

# FASHION & ACCESSORIES

Where self-expression meets spending power, and campus choices become a brand loyalty opportunity

An Eighteen24 White Paper · May 2026



## EXECUTIVE SUMMARY

A preview of how UK Gen Z students shop, what shapes their style, and how fashion brands win their attention.

The full paper sets out the data, the cultural forces driving choice, the brands earning loyalty and how fashion brands can build presence in the moments that matter. This summary gives you the headlines.

### FOR THE FULL PAPER

Email

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### INSIDE THIS SUMMARY

- Section guide
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- How to access the full paper

# A complete guide to fashion, accessories and the UK Gen Z student audience.

The full paper covers market data, behaviour, cultural shifts and media planning implications drawn from 60 industry sources including Statista, Mintel, Barclays, Universities UK, McKinsey & Business of Fashion, Pinterest, Kantar, YouGov and Outsmart.

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**This summary covers six headline insights.** The full paper goes further with brand-by-brand case studies on the labels winning UK Gen Z, the academic year demand calendar, and the activation formula for reaching 70% of UK Gen Z students in the moments their style identity is being formed.

## What the data tells us.

### INSIGHT 01 • THE MARKET OPPORTUNITY

**A £67.8bn UK fashion market with student spend underwritten on a calendar brands can plan around.**

The UK clothing market climbed back to £67.8bn in 2025, with clothing and footwear spending up 1.7% year on year. The UK is home to 2.86 million higher education students whose fashion spend is structurally underwritten by recurring (up to) £13,762 maintenance loans, paid in three predictable termly instalments. The full paper sets out the scale, structure and rhythm of the opportunity.

**£67.8bn**

**UK clothing market value, 2025**

Source: Mintel, 2026

### INSIGHT 02 • HOW UK GEN Z STUDENTS SHOP

**Tactile, multi-brand, and unusually open to switching.**

UK Gen Z students still want to handle products before buying. 73% prefer in-store, 61% want items the same day, 54% visit multiple brands per shopping trip. Loyalty is earned, not assumed: 97% are open to switching the brands they buy, while 45% will pay more for a trusted name. A high-discovery audience that rewards the brands present at the moment of choice.

**45%**

**of UK Gen Z are willing to pay more for fashion from a trusted brand or retailer**

Source: Mintel UK Fashion & Sustainability Report, 2025

### INSIGHT 03 • WHERE THE SPEND IS MOVING

**Footwear leads, resale is structural, accessories drive frequency.**

Three structural shifts are reshaping student fashion spend. The lifestyle sneaker market is worth £2.5bn, forecast to nearly double by 2035. The UK second-hand market is worth £7bn, growing three times faster than first-hand, with 38% buying from resale platforms in the past year. Jewellery has become a high-frequency identity category, with 58% buying three or more pieces a year.

**£7bn**

**UK second-hand fashion market, growing 3x faster than first-hand**

Source: OC&C Strategy Consultants / Barclays, 2026

## INSIGHT 04 • LONG-TERM VALUE OF WINNING STUDENTS EARLY

### Brand affinity formed at 19 compounds across 30+ earning years.

The UK graduate earns £100,000 to £130,000 more in lifetime earnings than a comparable non-graduate. Earnings grow 72% between ages 23 and 31, against 31% for non-graduates. 65% of UK students remain loyal to brands they first discover during Freshers. The customer at 19 is not the customer at 31, and the brands present at the entry point own the journey.

**£100k-£130k**

Net lifetime earnings premium for UK graduates over comparable non-graduates

Source: Institute for Fiscal Studies

## INSIGHT 05 • THE STUDENT STYLE CALENDAR

### Four predictable moments when consideration peaks across the academic year.

UK Gen Z students buy fashion year-round, but four moments drive demand peaks: Back to Uni in September-October (£1.5bn), Gift Season in November-December (£509m projected Gen Z jewellery spend over six months), Spring Term in January-March, and Festival & Holiday Season in April-June. Continuous presence builds the brand. Calendar alignment amplifies when intent peaks.

**£123**

Monthly UK student spend on clothing, shoes & accessories, the third-largest spend category after rent and groceries

Source: NatWest Student Living Index 2025 (Savanta survey of 5,001 UK undergraduates)

## INSIGHT 06 • SEEN, NOT SKIPPED

### DOOH delivers attention in the trusted public spaces fashion brands need.

DOOH is one of the few channels that cannot be skipped, blocked or scrolled past. It accounted for 67% of UK OOH spend in 2025, projected to reach 75% by 2027. Kantar's LIFT+ analysis, drawn from thousands of brand-lift studies across measured channels, finds DOOH delivers the highest impact for spontaneous brand awareness and purchase intent. For UK Gen Z, that effect is amplified: 84% notice OOH advertising and 58% trust it, both above the rates seen across older audiences.

**84%**

of UK Gen Z say they notice OOH advertising, with 58% saying they trust it

Source: JCDecaux GENgage, 2023

GET THE FULL PAPER

## Ready for the full picture?

We share the full white paper directly with brands, agencies and media planners working in this category. It's a short conversation and we'll send the complete report straight back to you.

### Email us for the full paper.

Tell us a bit about your brand or planning brief and we'll send the complete Fashion and Accessories white paper, plus answer any questions you have about reaching the UK student audience.

[sales@eighteen24.com](mailto:sales@eighteen24.com)

Already chatting with someone at Eighteen24?  
Reply to their last email and ask for the full Fashion and Accessories paper.

#### Curated research

Sourced from 60 industry references including Statista, Mintel, Barclays, the Institute for Fiscal Studies, Universities UK, McKinsey & Business of Fashion, NatWest, Pinterest, YouGov and Kantar.

#### Built for planners

Behavioural frameworks, brand case studies and the academic year demand calendar structured for use in briefs and recommendations.

#### Calendar-aligned

Maps the four predictable consideration peaks across the student year, from Back to Uni and Gift Season to Spring Term and summer ball season.

## The UK's largest student DOOH network

Over 400 premium full-motion D6 screens placed inside Students' Unions across 130+ campuses and 90+ universities, including 21 of the top 25. Positioned in cafés, study areas, gyms, social spaces and walkways where dwell time is highest.

**400+**

SCREENS

**90+**

UNIVERSITIES

**2M**

STUDENTS  
REACHED

**116M**

IMPRESSIONS  
PER FORTNIGHT

### Our formula for effective Gen Z engagement

Be where they  
**are**

Be where they  
**care**

Be where they  
**share**

Be where they  
**see you**

## Be the brand they take with them.

The university years are when UK Gen Z's adult style identity takes shape. New peer groups, new spending decisions and the brand affinities formed here become the wardrobe students carry into 30+ years of earning life. Show up in the moments that matter.

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