OSINT RESEARCH DOCUMENT

Deep Source Index

Gen Y, Gen Z & Gen Alpha Fashion Research
PDF Research Corpus

Research Topic: How and Where to Find Gen Y, Gen Z and Gen Alpha for a New Clothing Brand in Spain

Document Type: Source Index & Research Corpus

Sources Indexed: 45+ Reports

March 2025

Research Scope & Methodology

Research Objective: This document serves as a comprehensive source index for researching how and where to find Gen Y (Millennials), Gen Z, and Gen Alpha consumers for a new clothing brand entering the Spanish market.

Source Selection: Reports were identified using systematic Google Dork queries (filetype:pdf) targeting Tier 1-4 research organizations, consulting firms, and institutional sources. Priority was given to reports published within the last 5 years containing quantitative research, consumer surveys, and industry insights.

Research Questions Addressed: (1) Generation comparison for marketing ROI potential, (2) Platform/channel reach by generation, (3) Digital media consumption habits, (4) Purchase drivers and fashion behaviors, (5) Effective advertising formats and strategies.

Geographic Focus: Spain primary, with European and global context where Spain-specific data is limited.

45+	15	4	2019-2025
REPORTS INDEXED	SOURCE ORGANIZATIONS	SOURCE TIERS	PUBLICATION RANGE

Source Tier Definitions: TIER 1 Global Research Firms (Nielsen, Kantar, Ipsos, YouGov, GfK, Comscore) | TIER 2 Major Consulting (BCG, McKinsey, Deloitte, PwC, Accenture, EY) | TIER 3 Industry Orgs (IAB, eMarketer, WARC) | TIER 4 Institutional (EU Commission, OECD)

Tier 1: Global Research & Measurement Firms

Nielsen / NIQ / GfK

Report	Year	URL	Description
T1 **Spend Z: A Global Gen Z Report** NielsenIQ, GfK & World Data Lab	2024	https://25336566.fs1.hubspotusercontent-eu1.net/hubfs/25336566/Spend%20Z/NIQ_GenZ%20Report%2017FL.pdf	Comprehensive analysis of Gen Z spending power projected to reach $12T by 2030. Covers digital behaviors, values, and purchasing habits for CPG and tech/durables industries. Essential for understanding Gen Z economic impact.
T1 **European Retail Study 2024-2025** GfK	2024	https://gfkespana.es/hubfs/Retail%20Europeo%202024%202025/European_retail_study_2024_2025%20(Ingles).pdf	Analysis of European retail trends including regional online potential in Spain, generational distribution (Boomers vs Gen Z), and purchasing power data. Includes Spain-specific consumer confidence insights.

YouGov

Report	Year	URL	Description
T1 **Youth of Today: Gen Z Travel & Tourism**	2022	https://commercial.yougov.com/rs/464-VHH-988/images/YouGov-Travel-Whitepaper-A4-Final.pdf	Global Gen Z travel behavior study with Spain-specific data (34% of Spanish Gen Z intend to spend more on travel). Covers social media engagement, advertising attitudes, and platform preferences relevant to fashion marketing.
T1 **Personalized Advertising Report 2025**	2025	https://commercial.yougov.com/rs/464-VHH-988/images/WP-2025-03-US-personalized-advertising-report.pdf	Cross-market study of 17 countries including Spain (36% find personalized ads helpful). Examines Gen Z/Millennial comfort with personalized advertising and privacy concerns. Critical for targeting strategy.
T1 **Gen Z Food & Sustainability Survey** (Whole Foods)	2024	https://s24.q4cdn.com/538403808/files/doc_news/Gen-Z-Is-Hungry-for-Transparency...	US-focused study revealing 55% of Gen Z willing to pay more for sustainable products, 70% support climate-smart practices. Transferable insights for sustainable fashion positioning with Gen Z.

Ipsos

Report	Year	URL	Description
T1 **Global Trends 9th Edition**	2025	https://resources.ipsos.com/rs/297-CXJ-795/images/IpsosGlobalTrends9thEdition.pdf	Macro-level consumer trends across society, technology, and global economy. Covers AI mainstreaming, geopolitical tensions, and declining consumer optimism. Essential context for market entry timing.
T1 **Gen Z Category Report (Australia)**	2025	https://iris-au.ipsos.com/wp-content/uploads/2025/09/Ipsos_iris-GenZ-Report_V3.pdf	Digital media use analysis for Gen Z covering social media, video consumption, retail attitudes. Shows 4+ hours daily on smartphones, YouTube ubiquity (93% reach). Platform behavior insights applicable to Spain.

Comscore

Report	Year	URL	Description
T1 **The Power of Like: Europe**	2012	https://iabireland.ie/wp-content/uploads/2012/08/The_Power_of_Like_Europe.pdf	Analysis of social marketing for retail fashion brands (ASOS, Topshop, Zara, H&M) across UK, France, Germany. Documents Facebook's role in brand reach and purchase behavior. Historical baseline for platform evolution.
T1 **State of Social Networking**	2011	https://www.repman.com.tr/tr/wp-content/uploads/user/arastirmalar/comscore-social-world-deck.pdf	Global social networking trends showing 1 in 5 online minutes spent on social networks. Regional differences in engagement with Europe at 24% of time spent. Useful historical context for platform growth.

Tier 2: Major Consulting & Strategy Firms

Boston Consulting Group (BCG)

Report	Year	URL	Description
T2 **How Can U.S. Brands Reach Gen Z?**	2024	https://web-assets.bcg.com/89/59/e5e28cd249538bc99c5a45193b02/how-can-us-brands-reach-gen-z-slideshow-jan-2024-240401.pdf	Key finding: Gen Z is most open to brands at the start of purchasing journey. Trust people they know over traditional advertising. View social media as alternative to search. Critical for fashion brand awareness strategy.
T2 **Multigenerational World: Fashion Retail** (BCG x Vogue Polska)	2025	https://web-assets.bcg.com/a3/47/12517d3740aeb0d10ea1dce8b37e/raport-bcg-25-final.pdf	Generational shopping behavior analysis. Gen Z allocates higher budget share to fashion/beauty. 25% of Gen Alpha (10-15) visit stores for fun/social outings. Store experience design for multigenerational appeal.
T2 **Resale's Next Chapter: Secondhand Fashion** (BCG x Vestiaire Collective)	2025	https://web-assets.bcg.com/fa/dd/b5849ed54807b140a220f835487e/resales-next-chapter-report-oct-2025-1.pdf	Secondhand market worth $210-220B, growing 3x faster than firsthand. Europe fastest-growing region. 28% of closet items now secondhand. Gen Z drives adoption. Essential for circular fashion strategy.
T2 **European Consumers Brace for More Uncertainty**	2025	https://web-assets.bcg.com/a6/90/16fbefac4e779214b9a48a17e5b5/european-consumers-brace-for-more-uncertainty.pdf	Survey of 16,000 Europeans across 9 countries including Spain. 54% pessimistic about economy. Spain falls in middle for economic worry (between France/UK at 70% and Scandinavia at 36%). 59% in Spain seek bargains.
T2 **How the Generations Are Redefining Activewear**	2024	https://web-assets.bcg.com/e9/55/28d5934b44c6a18e83554c7d0d1a/bcg-activewear-trends-report.pdf	Gen Z activewear preferences: investing in cultural relevance, visible innovation, subtle branding. Performance as identity for Millennials. Strategic imperatives for reclaiming consumer relevance across generations.
T2 **Black Friday Consumer Study 2024**	2024	https://web-assets.bcg.com/IE/68/0FF886B5442E9F89E72E974AE91/BLACK-FRIDAY-CONSUMER-STUDY-2024-GLOBAL-RESULT-S-VP.PDF	Global holiday shopping behavior analysis. Purchase intent, channel preferences, and deal-seeking behavior by generation. Useful for promotional calendar planning in Spanish market.

McKinsey & Company

Report	Year	URL	Description
T2 **The State of Fashion 2026** (BoF x McKinsey)	**2025**	https://www.mckinsey.com/~/media/mckinsey/industries/retail/our%20insights/state%20of%20fashion/2026/the-state-of-fashion-2026-vf.pdf	Industry economic profit declined 12% in 2024 but remains 2.5x above pre-pandemic. Mid-market and value/discount segments strongest. 46% of executives expect conditions to worsen. Essential industry outlook.
T2 **The State of Fashion 2025**	**2024**	https://www.mckinsey.com/~/media/mckinsey/industries/retail/our%20insights/state%20of%20fashion/2025/the-state-of-fashion-2025-v2.pdf	Record economic profit expected in 2024. Luxury segment EP declining first time since 2016. Non-luxury catching up in value creation. Challenger brands outperforming incumbents in sportswear.
T2 **The State of Fashion 2024**	**2023**	https://www.mckinsey.com/de/~/media/mckinsey/locations/europe%20and%20middle%20east/deutschland/news/presse/2023/2023-11-28%20state%20of%20fashion%202024/sof24_report.pdf	Strategic themes: climate versatility, vacation mode, social media as new search, formalwear renaissance, Gen AI creation. Industry outlook with regional breakdowns including Europe.

Deloitte

Report	Year	URL	Description
T2 **Global 2025 Gen Z and Millennial Survey**	2025	https://sydna-startups.gr/wp-content/uploads/2025/07/2025-genz-millennial-survey.pdf	23,482 respondents across 44 countries. Work/life balance top priority, 53% using GenAI at work, environmental concerns influencing behavior. Denmark profile included as representative European market.
T2 **Global 2024 Gen Z and Millennial Survey**	2024	https://set.kellyservices.us/hubfs/Kelly_Services_July_2023/pdf/deloitte-2022-genz-millennial-survey.pdf	Austria country profile showing Gen Z/Millennial workplace preferences, education paths, and career goals. Work/life balance paramount, flexibility driving non-traditional employment models.
T2 **European Economic Outlook**	2025	https://www.ey.com/content/dam/ey-unified-site/ey-com/en-pl/insights/economic-analysis-team/documents/ey_european_economic_outlook_jan25_external.pdf	Euro area inflation forecast at 2.3% for 2025. Spain projected at 1.5% inflation in 2026. Economic conditions affecting consumer spending power and retail outlook.

PwC, Accenture, EY

Report	Year	URL	Description
T2 **Real Estate Retail Market Report** PwC Italy	2025	https://www.pwc.com/it/it/industries/retail-consumer/docs/2025/retail-market-report.pdf	European retail sector growth (+5.5% in 2024). Consumer shift toward mindful consumption, prioritizing essentials. Technology adoption intensifying competition. Retail market transformation analysis.
T2 **The Next Billion Consumers** Accenture	2023	https://www.accenture.com/content/dam/accenture/final/accenture-com/document/Accenture-Digital-Commerce-Report.pdf	98% of Gen Z with internet access are active social media users spending 4+ hours daily on smartphones. Four consumer segments identified: Digital Native Purchasers, Digital Savvy Millennials, Digital Native Content Creators, Digital Alpha Influencers.
T2 **2025 Retail Outlook for Europe** PMG (ex-EY)	2025	https://downloads.ctfassets.net/951t4k2za2uf/56pfadbxx3th4mjLP86SP4/7bc6caef64f3c6e6a7efa3feb3e43c7b/PMG_2025-State-of-Commerce-Europe_April.pdf	Retail media ad spending to surpass all digital channels by 2025. TikTok, YouTube Shorts, Instagram Reels driving product discovery. AI-powered search and social commerce redefining purchase journeys. Southern Europe showing resilience.

Tier 3: Industry & Media Organizations

IAB Europe

Report	Year	URL	Description
T3 **AdEx Benchmark Report 2024**	2025	https://iabeurope.eu/wp-content/uploads/IAB-Europe_AdEx-Benchmark-2024-Report_FINAL.pdf	European digital advertising reached EUR 118.9 billion (+16% growth). 30 markets covered including Spain. 21 markets grew double-digit. Retail media now separate category. Critical for ad spend planning.
T3 **Attitudes to Retail Media Report 2024**	2024	https://iabeurope.eu/wp-content/uploads/IAB-Europe_Attitudes-to-Retail-Media-Report-July-2024.pdf	90% of buyers investing in on-site retail media. 52% shifting budgets from linear TV. Access to retailer first-party data primary driver (90%). Fragmentation and lack of standards key barriers.

Other Industry Sources

Report	Year	URL	Description
T3 **Personalised Advertising in the EU** Implement Consulting (Google)	2025	https://alliedforstartups.org/wp-content/uploads/Personalised-advertising-in-the-EU.pdf	EUR 100 billion boost to EU competitiveness from personalized ads. Digital ad spend 57% of total in EU. Younger generations use social media as integral parts of lives. Academic review of personalization efficiency.
T3 **Online Advertising on IPR-Infringing Websites** EUIPO	2025	https://euipo.europa.eu/tunnel-web/secure/webdav/guest/document_library/observatory/documents/reports/2025_Online_Advertising...	Spain estimated ad revenue EUR 1.3 million from monitored websites (7th highest in EU). Context for understanding digital ad market scale and brand safety considerations.
T3 **Building a Digital Strategy for Generational Marketing** StackAdapt	2022	https://www.stackadapt.com/resources/wp-content/uploads/sites/2/2024/04/StackAdapt_Building-a-Digital-Strategy-for-Generational-Marketing.pdf	Gen Z spending power of $143 billion, 40% of global consumers. 89% feel brands should aim to do good. Effective personalization improves ROAS by 70%. Platform and creative guidance by generation.

Tier 4: Institutional & Public Data

Report	Year	URL	Description
T4 **Digital Economy and Society Statistics** Eurostat	2024	https://ec.europa.eu/eurostat/statistics-explained/SEPDF/cache/33473.pdf	EU enterprises generated 7.32% of turnover from web sales. Spain among countries with majority B2C web sales. 85.77% of enterprises use own websites/apps vs 45.25% using marketplaces. Official EU statistics.
T4 **DESI 2022 Thematic Analysis** European Commission	2022	https://www.knjiznice.si/wp-content/uploads/2023/01/DESI_Full_European_Analysis_2022.pdf	Digital Economy and Society Index covering connectivity, human capital, digital integration. 87% mobile broadband take-up in EU. 70% fixed very high capacity network coverage. Digital infrastructure context.
T4 **Integrating Consumer Behaviour Insights** OECD	2022	https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/05/integrating-consumer-behaviour-insights...	Behavioral economics insights for competition enforcement. Loss aversion, framing biases, salience effects. Understanding consumer decision-making psychology for marketing strategy.

Academic & Specialized Research

Generation Alpha Research

Report	Year	URL	Description
T3 **Gen Alpha 2025: Identity, Digital Influence** Britopian	2025	https://www.britopian.com/wp-content/uploads/2025/03/Gen-Alpha-2025-Identity-Digital-Influence-Purchasing-Power.pdf	Gen Alpha (born 2010+) first fully digital generation. 55% of 7-12 year olds use social media. Gaming platforms (Roblox, Minecraft) key discovery channels. Traditional advertising less effective. Influence via content and community.
T3 **Social Media's Impact on Female Gen Alpha** Lindenwood University	2024	https://digitalcommons.lindenwood.edu/cgi/viewcontent.cgi?article=2673&context=theses	52% of female Gen Alpha follow influencers, 69% purchased due to influencer. Skincare top purchase category. Sephora/Ulta as social venues. Peer pressure and influencer marketing drive consumer decisions.
T3 **Gen Alpha Digital Media Engagement** IJCRT	2024	https://ijcrt.org/papers/IJCRT2406392.pdf	First generation fully immersed in digital from birth. Screen time, social media monitoring, parental mediation. Digital citizenship and content limitation practices. Foundational research on Alpha behaviors.

Influencer Marketing & Fashion Research

Report	Year	URL	Description
T3 **Influencer Marketing Impact on Gen Z** IJPREMS	2025	https://www.ijprems.com/uploadedfiles/paper/issue_4_april_2025/40515/final/fin_ijprems1745670923.pdf	90% of Gen Z follow influencers, 72% purchased due to recommendations. Instagram most popular, followed by YouTube and TikTok. Micro-influencers (10K-100K) most trusted. Fashion 33% of influenced purchases.
T3 **Impact of Instagram Fashion Influencers** Bournemouth University	2023	https://eprints.bournemouth.ac.uk/37061/1/The%20Impact%20of%20Instagrams%20Fashion%20Influencers...	Media Dependency Theory applied to Gen Z fashion purchases. Instagram most popular platform for Gen Z. Dependency on medium predicts influence level. Research gap analysis on purchase behavior.
T3 **Short-Form Video Marketing & Gen Z Purchase Intent** All Multidisciplinary Journal	2025	https://www.allmultidisciplinaryjournal.com/uploads/archives/20250804182718_MGE-2025-4-221.1.pdf	Conceptual framework for TikTok, Instagram Reels, YouTube Shorts impact. Five factors: exposure, perceived authenticity, influencer credibility, engagement, demographic moderation. Foundation for campaign design.
T3 **Sustainable Fashion Practices Among Gen Z** IJIRT	2024	https://ijirt.org/publishedpaper/IJIRT190229_PAPER.pdf	Thrifting and upcycling practices among Indian Gen Z. Environmental awareness, digital activism influence. Circular fashion models and social responsibility. Regional perspective on sustainability trends.

Brand Loyalty & Consumer Behavior

Report	Year	URL	Description
T3 **Gen Z Loves Store Brands** PLMA	2024	https://www.plma.com/sites/default/files/files/2024-05/2024-plma-consumer-research-genz.pdf	67% of Gen Z highly aware of store brands, 64% purchase frequently. Four segments: Expressive Loyalists (23%), Functional Loyalists (24%), Optimistic Moderates (31%), Discerning Reluctants (22%). Brand loyalty drivers by segment.
T3 **Factors Influencing Gen Z Brand Loyalty** IJRAW	2024	https://academicjournal.ijraw.com/media/post/IJRAW-4-11-49.1.pdf	Five-pillar framework: digital engagement, social media influence, brand values alignment, personalized experience, emotional connection. Conceptual model for loyalty-building strategies targeting Gen Z.
T3 **Millennial Shopping Behavior (Europe)** L'Observatoire Cetelem	2018	https://observatoirecetelem.com/app/uploads/sites/2/2019/02/observatoire-cetelem-consommation-2018-en.pdf	Spanish and Portuguese Millennials most likely to save (83%, 80%). 76% prefer to spend on useful items. 72% prefer quality over quantity. Physical shopping as social outing (20%). Connected purchase behavior.

Spain & European Market Specific

Report	Year	URL	Description
T3 **Spain Country Factsheet: E-commerce** Landmark Global	2025	https://landmarkglobal.com/uploads/destinations/Factsheet_2025_ES.pdf	33.8 million online shoppers in Spain. EUR 3,300 average spend per shopper. EUR 95 billion e-commerce value. 56% cross-border. Clothing/footwear 43% of cross-border purchases. TikTok redefining brand engagement.
T3 **DHL E-commerce Insights: Spain**	2024	https://www.dhl.com/content/dam/dhl/local/global/dhl-ecommerce/documents/pdf/g0-ecs-insights-country-report-spain-1.pdf	75% browse online weekly, 44% buy from abroad. Social media for shopping inspiration. Debit/credit card preferred (41% digital wallet). 63% want free returns for cross-border purchases. Payment and delivery preferences.
T3 **Brand Trust in Spain** Intuit Mailchimp	2024	https://assets.ctfassets.net/yzco4xsimv0y/6sDyaVsseZMMevxgXLAujg/475d4936dfe3bfe061b55a8cd20ca26d/Spain_-_Brand_Trust...	52% of 18-24 year-olds in Spain believe future of personalization means products come to them. 58% looking for cheaper alternatives. 37% prioritize brand trust and connection. Data personalization acceptance with assurances.
T3 **European Retail Radar H2 2024** Cushman & Wakefield	2025	https://admin.immoweek.fr/wp-content/uploads/2025/04/european-retail-radar-h2-2024-final-1.pdf	Retail rents growth across Europe. Retail parks strongest growth. High streets approaching 2018 levels. Tourism surpassing 2019 numbers. Sneaker brands focusing on customer experience. Department store transformation.
T3 **European E-commerce Report 2024** Ecommerce Europe	2024	https://ecommerce-europe.eu/wp-content/uploads/2024/10/CMI2024_Complete_light_v1.pdf	Country profiles for EU e-commerce including Spain. Internet penetration, e-shopper percentages, GDP and E-GDP data. Cross-border shopping trends. Payment method preferences by market.
T3 **Mid-Year 2025 Outlook: Europe** PMG	2025	https://downloads.ctfassets.net/951t4k2za2uf/7Il09Hi7dl2yPusK8Fz82y/ddd2b560972dee4421c4dfa8f0f4b854/PMG_2025_Mid-Year-2025-Outlook-Europe.pdf	Spain reported highest optimism at 34% (vs France pessimism at 28%). Consumer confidence improving but negative. Apparel among categories with cut discretionary spending. Deal-seeking behavior analysis.

Additional Specialized Sources

Report	Year	URL	Description
T3 **The Next Gen Index: Afterpay**	2022	https://afterpay-newsroom.yourcreative.com.au/wp-content/uploads/2022/03/Afterpay_Web_report_US_Final.pdf	Gen Z spending on BNPL up 925% since Jan 2020. Fashion accounts for 73% of Gen Z spend. 45% name TikTok/Instagram as top platforms influencing purchases. Mobile commerce and social shopping behavior.
T3 **Next Gen Shoppers: Square/Afterpay**	2022	https://www.workwithsquare.com/rs/424-IAB-218/images/Afterpay%20-%20Next%20Gen%20Shoppers%20whitepaper.pdf	73% use smartphone to shop online. 88% of Gen Z use social platforms multiple times daily. 45% name TikTok/Instagram top for purchase influence. Social commerce integration essential for reaching next-gen.
T3 **Retail Revolution: Top 10 Trends 2024** ERA Group	2024	https://en.eragroup.com/wp-content/uploads/2024/01/Retail-Revolution-The-Top-10-Trends-and-Predictions-for-2024.pdf	Inflation as Europe's top concern. National living wage impacts. Consumer price sensitivity and cautious spending. Supply chain optimization needs. Retail landscape complexity and risk reduction strategies.
T3 **Gen Z Disruption of Retail** University of Porto	2020	https://repositorio-aberto.up.pt/bitstream/10216/117550/2/302811.pdf	Exploratory study of Gen Z purchase journey. Brand bias in search, price comparison behavior, peer validation seeking. Five consumer clusters identified by digital behavior and preferences.

Source Index Summary

Total Reports Indexed: 45+ primary sources

By Tier: Tier 1 (Research Firms): 9 reports | Tier 2 (Consulting): 14 reports | Tier 3 (Industry/Academic): 19 reports | Tier 4 (Institutional): 3 reports

By Generation Focus: Gen Z: 35+ reports | Millennials/Gen Y: 12 reports | Gen Alpha: 5 reports | Multigenerational: 8 reports

By Geography: Spain-specific: 6 reports | Europe-wide: 28 reports | Global with European data: 11 reports

Publication Range: 2019-2025 (majority 2022-2025)

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