



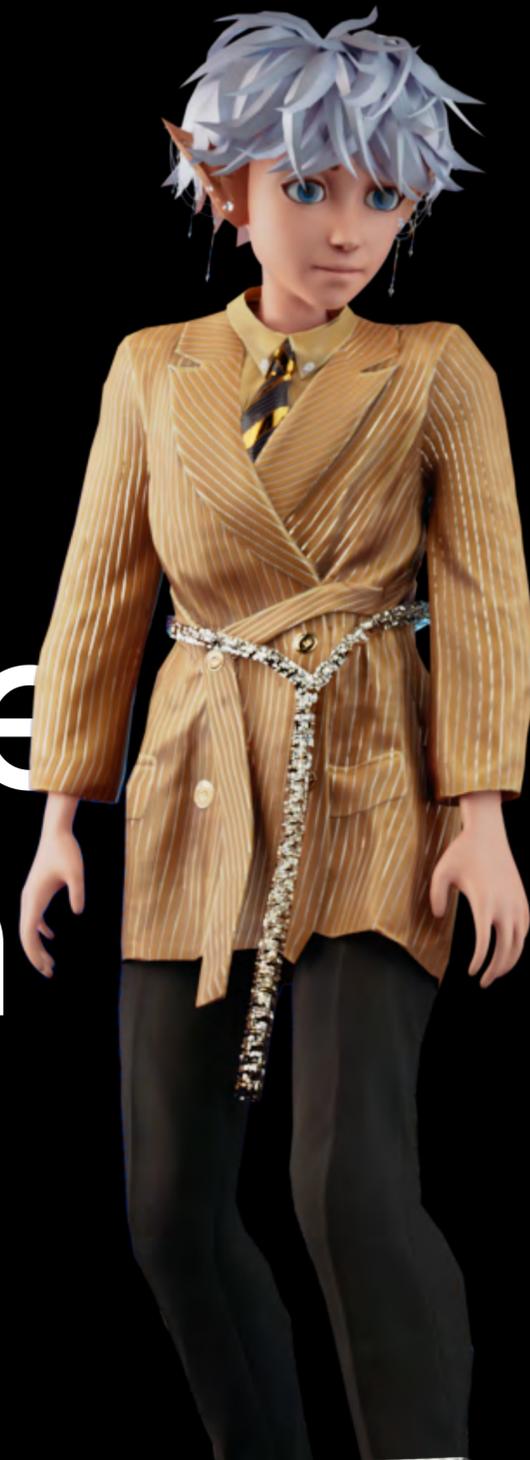
Metaverse Fashion Trends

2022

ROBLOX

THE NEW SCHOOL
PARSONS

The future of fashion is digital



“Gucci, Nike, Burberry, Carolina Herrera, Ralph Lauren, Tommy Hilfiger, Vans, Karlie Kloss... these are just a few global brands and people redefining fashion and experimenting with digital clothing, accessories and their own immersive experiences, as reported by the media over the past few years. But long before the vast potential of digital fashion caught widespread attention of media and brands, it had a massive following on immersive platforms like Roblox.

Here, millions of people have been connecting, socializing, creating – and expressing themselves through their digital identity and fashion – for over a decade. More recently, community designers have been setting trends, hosting virtual fashion shows, selling items straight off the runway and launching seasonal collections. Some call it an early example of the metaverse, an immersive version of the future Internet where people do things together in 3D spaces.

What’s been fueling all of this activity? First, community demand and the role that digital identity plays in every user journey on Roblox, where people come to be whoever they want to be. And second, the free tools that are easily available to our global community to create and share digital fashion on Roblox. This infrastructure, combined with an incentive to participate in the vast global virtual economy on the platform, makes self-expression opportunities truly limitless.

We see it in this report’s data showing the high frequency of avatar customization, along with the sheer number and variety of items created, acquired and worn on the platform. We believe the data will prove insightful for anyone interested in the current digital fashion trends, what digital fashion designers of today are creating and what resonates with Gen Z consumers. “

CHRISTINA WOOTTON

VP, Global Partnerships, Roblox

“ Collaborating on this research with Roblox has made it even more clear that self-expression through digital fashion is important for digital natives and Gen Z. Many already value digital fashion items and designers just as much as (or sometimes more than) they value physical items, and this will grow with time. As a result, it will become more and more important for future designers to be able to not just create physical collections, but also introduce digital versions of their collections.

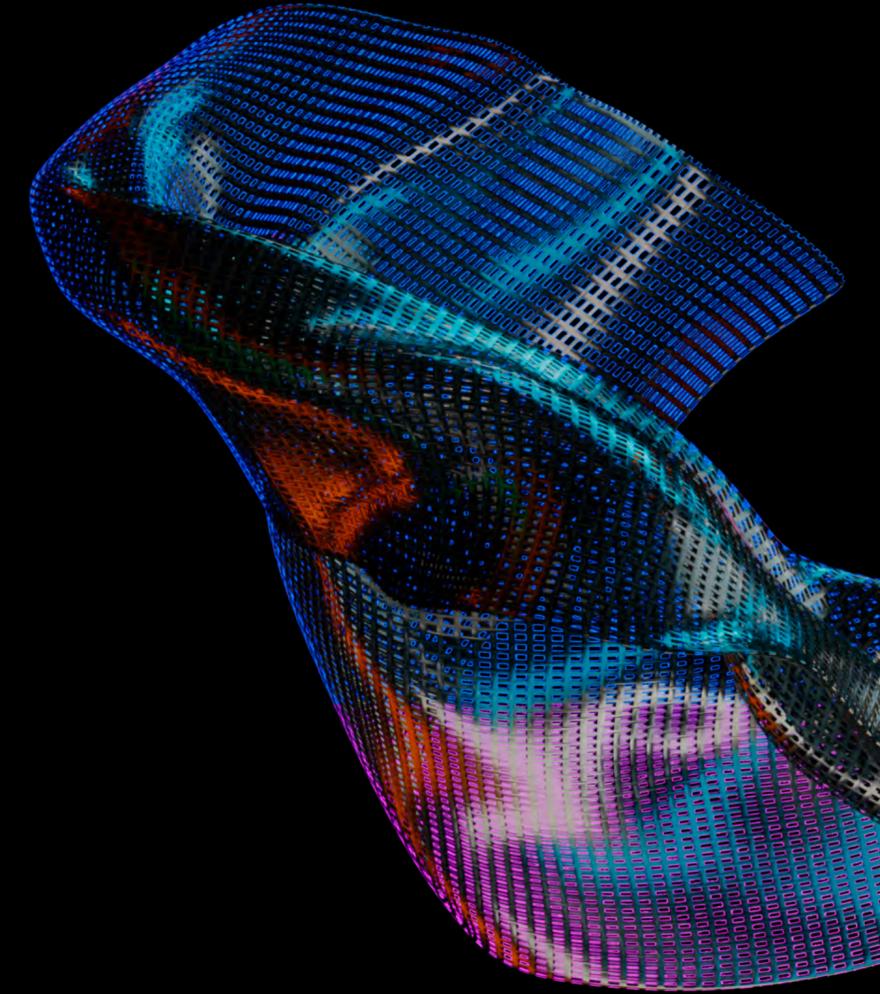
Designers will need to create in 3D and push the boundaries of creativity with metaverse-only garments, accessories and collections that can be made available with lightning-fast speed to millions of consumers globally, on platforms like Roblox. As we prepare the next generation of fashion designers for their careers, we look forward to the future where this creative profession is made accessible to all through the latest technology and creators' innovation. ”

BEN BARRY

PhD, Dean and Associate Professor of Equity and Inclusion, School of Fashion at The New School's Parsons School of Design

Key Insights

- With Gen Z spending more time socializing, creating and expressing themselves in immersive social spaces, **the demand for digital fashion, its widespread impact and, as a result, its prestige are on the rise.**
- **Half of our survey respondents** say they are changing their avatar's clothing at least every week, and for **2 in 5** self-expression (via clothing and accessories) in the digital world is already MORE important than expressing themselves in the physical world.
- Just like in the physical world, community members on platforms like **Roblox tend to connect with and react to others around them based on the way they look and dress**, which can have a profound impact on their self-confidence and relationships.
- Gen Z say dressing their avatars allows them to **express their individuality (47%) and feel good about themselves (43%)**, but also to feel more connected to peers – both in the digital and physical worlds.
- While 2022 IRL fashion trends were reflected both in community creation and purchases, what people wear in immersive spaces also impacts their choices in the physical world: **70%** of Gen Z say their avatars dress at least somewhat like their IRL style, while equally as many users (**70%**) get physical style inspiration from dressing their avatars.
- **Nearly 3 in 4** say they will spend money on digital fashion, with over **1 in 4** having spent from \$20 to \$100 or more on a single virtual item.
- **Two thirds** are excited to wear brand name virtual items on Roblox, and **nearly half** of Gen Z consumers look for digital fashion brands and designers to offer new and different clothes they can experiment with, which they wouldn't otherwise try in real life.
- **Respondents say it's important** for them to have diverse customization options for their avatars, from having a full range of skin tones (**70%**) to a full range of body sizes (**64%**) and a full range of hair colors, textures and styles (**70%**). The vast majority also agree with the importance of **digital clothing designs being inclusive.**



Report Methodology —This report includes two complementary sets of data:

1. Behavioral data collected from the Roblox platform from January through September 2022.
2. Self-reported survey data collected from 1,000 Gen Z users between the ages of 14 and 24, living in the United States. To obtain these responses, Roblox, in collaboration with the Parsons School of Design, commissioned a poll from Momentive (makers of the SurveyMonkey platform) fielded September 19-21, 2022. The sample has been balanced for gender using the Census Bureau's American Community Survey to reflect the demographic composition of the US population in that age range.

The Accelerating Influence of Creator Communities on Fashion



Over the course of 2022, **over 11.5 million** creators have designed more than **62 million** clothing and accessory items on Roblox. That's a **25% increase** from last year in the number of creators making digital goods on Roblox in January-September 2022. And with the release of creator verification in September 2022, Roblox users are able to identify notable creators by their Verified Badges, including those designing digital fashion on the platform.

These designers' work is pushing the boundaries of creativity in fashion at large and getting recognized with prestigious awards, like the British Fashion Council's first-ever [Fashion Award for Metaverse Design](#).

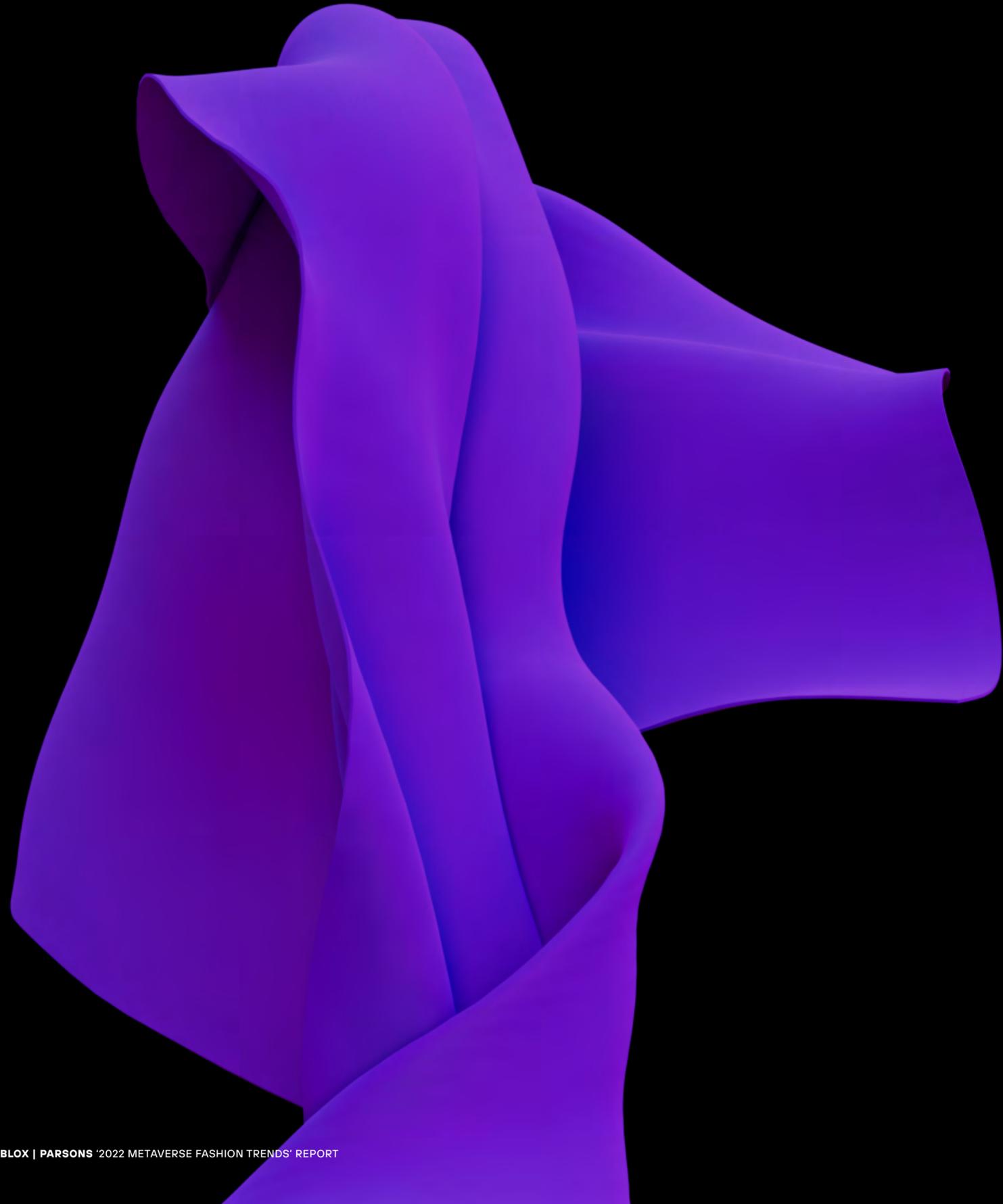
Based on just this year's activity, there are at least **200 times** as many creators designing clothing and accessories on Roblox as there are fashion designers creating physical collections in the United States.*

That's also at least six times as many creators as the estimated [1.8 million people](#) that are employed in all of the U.S. fashion industry across manufacturing, textiles and other fashion items.

“Fashion designers in the future won't just be sewing, they'll be coding..”

KARLIE KLOSS

Supermodel + Entrepreneur



“ When looking at the numbers of fashion designers in the U.S., these are likely people who do that for a living and focus on this full time. On Roblox, some of the community creators may be dabbling in creation and designing items as a hobby, but what’s important to underscore is this ability to easily create digital fashion and make it available to a global consumer audience allows many more individuals to get creative and experiment with designing and sharing their own fashions.

This is something that various barriers may prevent them from doing in the physical world – from the cost of materials to not having sewing skills or knowing how to pattern draft, or simply not having a way to share what they are creating with a broader audience, which is an important incentive. ”

DANIEL DRAK

Assistant Professor of Strategic Design and Fashion Communication & Associate Director of MPS Fashion Management, Parsons School of Design

Digital Fashion Embraced by Aspiring and Established Designers

Fueling the growth of digital fashion on Roblox even further is the entry of some of the world's most influential and well-known fashion brands and icons. This trend accelerated in 2022 with **dozens of renowned fashion and beauty brands** establishing presence on Roblox, designing virtual items, collaborating with existing popular experiences or creating their own immersive spaces.

The likes of Burberry, Carolina Herrera and supermodel and entrepreneur Karlie Kloss, as well as metaverse-only fashion companies like DRESSX, are experimenting with metaverse initiatives and pursuing digital products as a part of their portfolio. Many are tapping into collaborations with our experienced community designers to better understand Roblox users and come up with the most effective strategies for their early metaverse ventures.



Here are just a few designers from the Roblox community who have worked directly with global fashion brands in 2022 (some had multiple collabs):

- **Gucci Town:** [@RookVanguard](#), [@Lirn](#), [@Bunnexh](#)
- **Fashion Klosette Designer Showcase by Karlie Kloss:** [@Builder Boy](#), [@Lovespun](#), [@Reverse_Polarity](#), [@RynityRift](#), [@Yourius](#)
- **Burberry:** [@Builder Boy](#)
- **Tommy Hilfiger:** [@Soulskor](#), [@RynityRift](#), [@Yourius](#), [@Junozy](#), [@StrapCode](#)
- **Puma:** [@Wonder Works Studio](#)
- **Carolina Herrera runway dress for Karlie Kloss:** [@Lovespun](#)
- **Forever 21:** [@OceanOrbsRBX](#), [@MiracleDrops](#), [@StrapCode](#), [@Martin_Rblx2](#), [@Builder Boy](#)

The Importance of Avatar Customization for Gen Z

In our survey of 1,000 Gen Z consumers who are active on Roblox, nearly all **(94%)** say they have done at least some customization of their avatars, with over half **(53%)** saying they've customized "a lot." Interestingly, older users (especially female) are more likely to customize their digital identity: **60%** of users ages 22-24 (and the number goes up to **65%** for female users) have done "a lot" of customization vs. **45%** of users in the 14-17 y.o. age group*.

RESPONDENTS SAY* THEIR AVATAR MOST REPRESENTS:



“ Two years ago, my goddaughter asked me for a pair of digital shoes for her avatar on some platform that were more expensive than shoes she wears IRL. She made me realize it was really important for her avatar to wear those sparkly shoes, because this is where Gen Z are and what their communication is about. Their identity in the metaverse really matters. ”

GEMMA SHEPPARD

One of UK's leading fashion stylists and Metaverse Global Fashion Director, Dubit

Consumers Want Diverse Customization Options

Diverse options for avatar customization are important for the majority of community members. When asked about the significance of having a full range of skin tones for their avatars, **70%** of respondents indicated that this was “extremely” or “very important.”

This is in addition to **64%** of respondents who believe it is similarly important that a full range of body sizes are included, and **70%** of respondents who believe a full range of hair colors, textures and styles ought to be included.

On Roblox, millions of community members already have limitless customization options; and whatever is not yet available can be easily created. There are multiple community creators who specialize, for example, on a diverse range of hairstyles for broad representation – like [@Jazzyx3](#), [@Lirn](#) and [@EvilArtist](#). And in addition to existing body customization options, stylized avatars and avatazr bundles already available on the platform, community members will also be able to create any avatar bodies they can imagine in the future.

“ Where fashion choices are linked to identity and community, it’s critical that users have options for full customization of their avatars, in addition to the fashion they have them wear. ”

DANIEL DRAK

Parsons School of Design



Roblox data shows that **approximately 40%** of our monthly active users update their avatars at least once a month with approximately **18%** of daily users updating daily this year*

HALF OF GEN Z USERS SAY THEY CHANGE THEIR AVATAR'S CLOTHING AT LEAST EVERY WEEK**



*Based on the average number of updates January - September, 2022

**Based on survey fielded September 19-21, 2022, among 1,000 people ages 14 to 24, living in the United States.

Digital Self-Expression Fuels Confidence and Connection

As one of the key forms of self-expression in next-generation social spaces like Roblox, where you can be whoever you want to be and take your avatar wherever you go, digital fashion and avatar customization can have a profound effect on people's self-confidence and relationships. Just like in the physical world, online communities tend to connect with and react to others around them based on the way they look and dress, which in turn can spur creativity and positively impact confidence, optimism and connections in both the digital and physical worlds.

“Adam & Galinsky (2012) demonstrated the concept of encloded cognition, or how our clothing choices affect our psychological processes and mood. It is interesting to note how digital clothing choices may have similar effects.”

DANIEL DRAK

Parsons School of Design

DRESSING THEIR AVATARS ALLOWS GEN Z CONSUMERS TO:



*Based on survey fielded September 19-21, 2022, among 1,000 people ages 14 to 24, living in the United States.

“Being online has created a new realm of imagination for who you want to be, and it’s really what captivated me from the start.



It’s wholesome to see that avatar customization is bigger now than what it used to be. Our identities online become influential to who we are in the physical world, how we present ourselves, and eventually – our level of confidence. ”

@EVILARTIST Digital Fashion Designer on Roblox

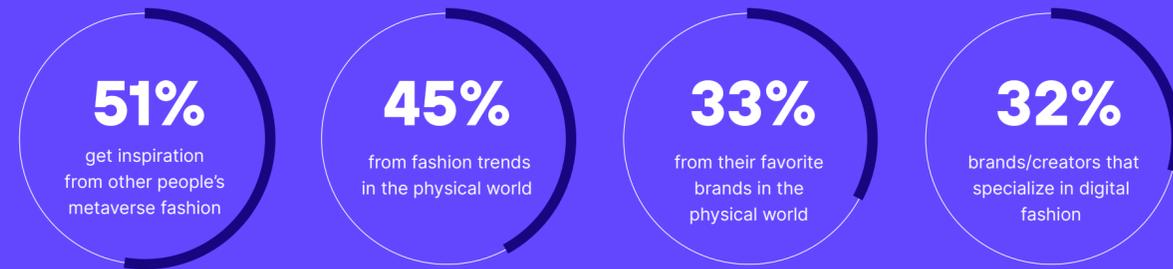


Gen Z Avatar Style

It's clearly important for communities on immersive social platforms like Roblox to show off their style during their daily activities and interactions, and users are also being influenced by what others are wearing around them – just like in the physical world.

- **For 42% of respondents**, expressing themselves with cool clothing and accessories in the digital world (i.e. on Roblox) is more important than expressing themselves in the physical world.
- **Almost half (46%)** of Gen Z users say having a trendy/fashionable outfit is “extremely” or “very” important for them.
- **Over three quarters (76%)** say it's important to be fashionably dressed in the metaverse.*
- **Two thirds (66%)** say they are excited to wear brand name clothing or accessories on Roblox.

Avatar Style Inspiration



For their digital fashion inspiration, Gen Z pay close attention to what other avatars are wearing with **82%** saying they are likely to try items they see on other avatars.* This data points both to the impact of existing trendsetters and friends' fashion choices on the platform, as well as to the future rise of digital influencers – whether IRL personalities or those that only exist in the metaverse.

*Combining respondents that answered "somewhat likely," "very likely," or "extremely likely."



SEEING OTHER AVATARS' STYLES EVOKES A RANGE OF EMOTIONS**



Mood of the Day Drives Digital Fashion Choices

People are expressing themselves through their avatar style and Roblox fashion choices similarly to the way they do in the physical world, with **over half (53%)** saying their style changes based on their mood or feelings on a particular day, and **42%** being driven by an impulse to immediately try on a new purchase. **Over a third (37%)** also change clothing based on where they are going in the metaverse and what they are doing, and for **nearly 1 in 4** it's about the group they are hanging out with, or the weather or season in the physical world around them.

“When making digital fashion choices I feel that people are more bold and daring. They feel they can be more courageous and wear items that they would not normally wear in the real world. There’s also this ability to dress an avatar to fit in with a certain social group or community. Community members can become part of groups which dress a certain way, perhaps wear Harajuku styles, cosplay or the latest gothic designs – which in the physical world, and for various reasons, they may not be able to be a part of.”

[@MISSMUDMAAM](#)

Digital fashion designer on Roblox

WHAT MAKES YOU CHANGE YOUR AVATAR STYLE?



*Based on survey fielded September 19-21, 2022, among 1,000 people ages 14 to 24, living in the United States.



Top 3 Metaverse Fashion Styles

AS DESCRIBED BY GEN Z USERS, THEY TYPICALLY GO FOR*:

Casual
45%

Trendy
38%

Bold
29%

- Females are more likely to describe their avatar style as Casual/Comfortable, Trendy, Bold.
- Males are more likely to describe their avatar style as Sporty/Athletic, Conservative or Understated.

"I like to dress up my avatar differently for every season and holiday."

@IAMSANNA Video creator and Roblox user

"My avatar's an expression of my personality, the things I'm into. I have a ton of real life merch represented on my avatar in Roblox. It says a lot about me and who I am."

@MEGANPLAYS Video creator and Roblox user

"I feel like I can get a lot more creative with my digital wardrobe. It's literally unbreakable! If I want to swim in water with a beautiful gown I can, and it won't get ruined by water! If I wanted to climb a mountain in a pair of heels they wouldn't break my ankles either. I can even wear a basic sweater with tennis shoes and fly around on a donut spaceship if I wanted. Digital fashion within Roblox and the metaverse truly has endless combinations, uses and can be worn whenever. It's also a very fun way of expressing yourself without words instead of making a statement on social media or posting a status update!"

@LOVESPUN Digital fashion designer on Roblox

The Vital Role of Inclusivity in Digital Fashion

Most Gen Z users (**90%**) note the importance of digital clothing being inclusive for all body types:*

- **7 in 10** consider inclusivity in digital fashion to be “very” or “extremely” important.
- Females are more likely to say that clothing in the metaverse should be inclusive for all body types than males (**78% vs. 60%**).

Cutting-edge technology can help address this consumer priority for the digital fashion designers of the future. In 2022, Roblox launched its groundbreaking [Layered Clothing](#) technology that allows designers to create hyper-realistic 3D garments that fit all avatar body types, from fantastical creatures to humanoid bodies of all shapes and sizes. Designers and brands, from Gucci and Burberry luxury fashion, to Tommy Hilfiger, Nars and Alo Yoga, have been embracing this technology to create a single design that fits all potential customers. The clothing itself has been gaining popularity within the community as well, as both beautiful and inclusive.



How the Layered Clothing Technology is Transforming Digital Fashion

Looking at adoption both from creators and consumers in this new 3D clothing category, here are some 2022 Layered Clothing statistics at a glance:

- Nearly **11 million** users have purchased Layered Clothing items to date, and **157 million** have acquired both free and paid items.
- **96%** of the top 10,000 eligible experiences now support Layered Clothing.
- The top 50 best-selling Layered Clothing items include a broad variety of clothing, from oversized sweaters and cardigans created by @PureSweetener, to princess gowns from @Muemby, and cropped tops from @ReddieTheTeddy. Among items dominating the list of top 10 items by sale are outerwear, sweaters/sweatshirts and playful one-piece suits.



One standout example is a recent collaboration among Carolina Herrera, Karlie Kloss and Roblox community creator @Lovespun. On September 12, 2022, Karlie Kloss wore a Carolina Herrera floral trench gown on the runway. Right after she walked, the dress went live on Roblox, recreated as a 3D digital dress powered by the Layered Clothing technology. Available for 4 hours only, it sold 432 units and then became a collectable (or “limited” item), among some of the most exclusive and highly sought after pieces on the platform. Within a week since launch, the gown **was re-sold multiple times for the equivalent of over \$1,000 on Roblox** and once for the equivalent of **\$5,000**.

“ It stands out with its highly detailed 3D quality reflective of the exquisite physical world design of Carolina Herrera and being a Layered Clothing item. Combined with the way the beautiful Karlie Kloss wore it and spotlighted it for the Roblox community, it was a recipe for success. ”

@LOVESPUN

Digital fashion designer on Roblox



“ It is exciting to see that there’s been such a great response to the dress, and the fact that there is such appetite and interest in celebrating fabulous fashion no matter where – from our runway show at The Plaza Hotel all the way to the metaverse. ”

WES GORDON

Creative Director, Carolina Herrera

Gen Z's Virtual Closets and Spending Habits

The story of the Carolina Herrera dress points to online communities' interest in digital fashion, including collectables, but also brings us to the topic of digital fashion shopping budgets and the contents of virtual closets of community members on Roblox.

Nearly 3 in 4 Gen Z in our survey said that they will spend money on digital clothing and accessories – here's the breakdown on what users spend:

- **31%** say they spend up to \$5 monthly; about **30%** spend up to \$10-\$20 each month; and about **12%** spend \$50-100 each month.
- While the majority have spent \$5-\$10 on a single item, **27%** users say they have spent anywhere from \$20 to over \$100 on a single virtual item.
- **1 in 4** say they own over 50 items their avatar can wear.

HERE'S WHAT COMMUNITY MEMBERS HAVE BEEN SHOPPING FOR IN 2022:

Top 10 most popular categories in the Roblox Avatar Marketplace that collectively include over 1 billion items sold in 2022 to date:

- 1) Shirts
- 2) Pants
- 3) Hats
- 4) Hair Accessory
- 5) Face Accessory
- 6) T-Shirt
- 7) Back Accessory
- 8) Shoulder Accessory
- 9) Jacket Accessory
- 10) Waist Accessory

The top 50 best-selling items list is dominated by hairstyles, but also includes some extravagant accessories like [Fluffy Feather Boa](#), [White 3.0](#), and [Rounded Cute Anime Glasses](#).



The Influence of IRL Trends on Avatar Fashion (and Vice Versa)

In their survey responses*, **70% of Gen Z** say their avatars dress at least somewhat like their IRL style, while equally as many users (**70%**) also get physical style inspiration from dressing their avatars. This fall's runway shows are a great illustration: Coperni designers cited Roblox avatar shapes that inspired some of the numbers from their latest collection, and Loewe sent pixelated garments down the runway. It's clear digital fashion and spending time in the metaverse inspire designers and users across physical and digital.

Our 2022 Roblox platform data reflects that – both in what consumers are shopping for, as well as what community designers and brands are bringing to the platform.

When buzz for the upcoming “Barbie” movie took over social media and #Barbiecore started trending, [Forever 21's Barbie collection](#) made a timely appearance on Roblox, offering Layered Clothing items for purchase so shoppers could quickly (and literally) get dolled up for their metaverse adventures.

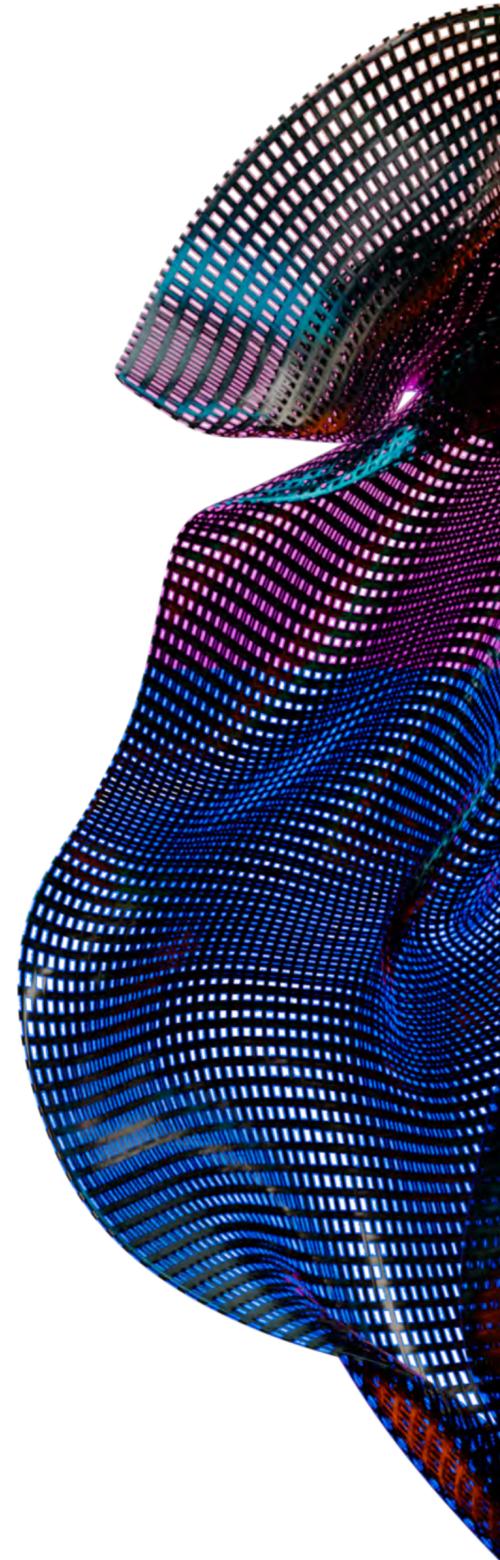
Needless to say, sporting the latest digital fashion trend on Roblox can foster more sartorial experimentation in the physical world.

“Immersive social spaces have been important for individuals to explore and experiment with identity and expression through fashion, while engaging in worldmaking and building communities.

With advances in digital fashion, Gen Z is poised to benefit significantly both in-game and IRL as they create and dress their avatars where 37% of respondents indicate their avatar represents their ideal self, and 39% indicate their avatar represents a part of them that they don't always get to show. //

DANIEL DRAK

Parsons School of Design



Community Brings Y2K and Other IRL Trends to Roblox

Another prominent trend of 2021-2022 is Y2K, revived by Gen Z sporting vintage sportswear, crop tops, colorful sunglasses, wide-leg jeans and baguette bags on social media. Taking us back to the year 2000, the late '90s and early 2000s fashion styles are flooding social feeds, runways and fashion magazines with the Y2K nostalgia. This style has also been peaking on Roblox, with this year's total purchases surpassing **188 million** Y2K-labeled items*.

From January to September 2022, we saw an **85%** year-over-year increase in the creation of unique virtual items labeled as Y2K (nearly double the number created and offered for sale in the Roblox Avatar Marketplace during the same time period in 2021) and a **165%** year-over-year increase in purchases of unique Y2K virtual items:

- **2022:** 383K+ items created and 922K+ items purchased
- **2021:** 206K+ created and 348K+ purchased

*Items accounted for include those labeled as Y2K



Credit: Virtual Brand Group x Forever 21

Here's What Consumers Want to See from Digital Designers and Brands

For designers and brands looking to get into metaverse fashion – here's what community members would like to see from you on Roblox and beyond:

CONSUMERS ARE LOOKING FOR DIGITAL FASHION DESIGNERS AND BRANDS TO OFFER:



“I design and sew clothing in real life, and the skill set transfers. It helps to know how fabrics move and fold, where to add the wrinkles; you want people in digital spaces to see if it's leather or if it's cotton.”

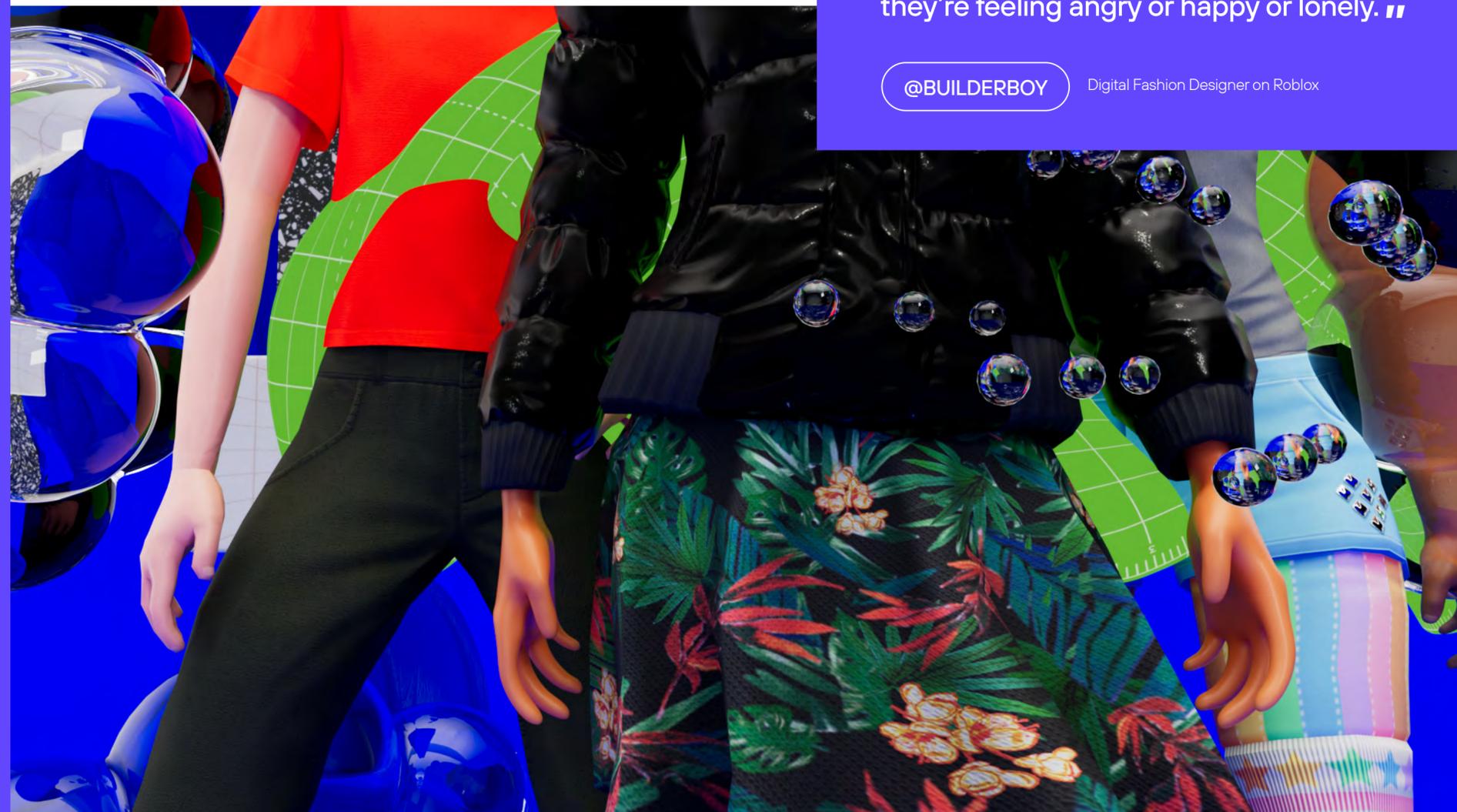
@COFFEENERD

Digital Fashion Designer on Roblox

“I've found that it's not the most perfectly designed outfits that are the most popular, but the ones that convey a feeling. Virtual clothes can say a lot about the user, and people can change what they're wearing based on whether they're feeling angry or happy or lonely.”

@BUILDERBOY

Digital Fashion Designer on Roblox



The Prestige of a Digital Fashion Design Career Is On The Rise

Finally, the growing amount of time the next generation of consumers spend in immersive spaces indicates they are also likely dedicating more time to customizing avatars, shopping and wearing digital fashion.

Now **more than half (58%)*** of Gen Z believing that a career as a digital fashion designer is just as impressive, or even more impressive, than the role of a physical fashion designer.

This number grows significantly among people who spend up to \$100 per month on avatar style, where **54%** state that being a digital fashion designer is more impressive.

“The world’s next Coco Chanel is probably a 10-year-old girl who is currently designing avatar skins on Roblox.”

CATHY HACKL

Futurist, Chief Metaverse Officer
& Co-founder of Journey

Predictions for the Future of Digital Fashion





“The report’s data clearly demonstrates that for many consumers, their digital identity is not always about replicating their style and IRL preferences. It’s about fully expressing themselves through their digital selves – showing sides they cannot easily express, or perhaps making bolder choices than those they would make in the physical world. Many are also willing to pay for unique digital fashion, since style is important for many Gen Z consumers in digital spaces, sometimes more so than in the physical world.”

MANUEL BRONSTEIN

Chief Product Officer, Roblox

“The next generation of fashion designers and brands will be deeply immersed in digital fashion, dressing avatars, designing 3D digital versions of their collections and creating metaverse-exclusive items. With Gen Z consumers spending more time in immersive spaces and increasingly growing their economic power and influence on fashion, trends from the metaverse are expected to have a profound impact on physical fashion, while trends from the physical world will also continue to move into the metaverse offerings and purchases.”

CHRISTINA WOOTTON

VP of Global Partnerships, Roblox

“Digital fashion – and that of the profession of a digital fashion designer – is transforming the fashion industry and design practice, and it will only continue to do so. The metaverse allows designers to push creative boundaries and to do so in ways that center access, inclusion, and self-expression. It is an exciting time to be in digital fashion – stay tuned for possibilities, energy, and opportunities in the field!”

BEN BARRY

PhD, Dean and Associate Professor of Equity and Inclusion, School of Fashion at The New School’s Parsons School of Design

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QUOTES

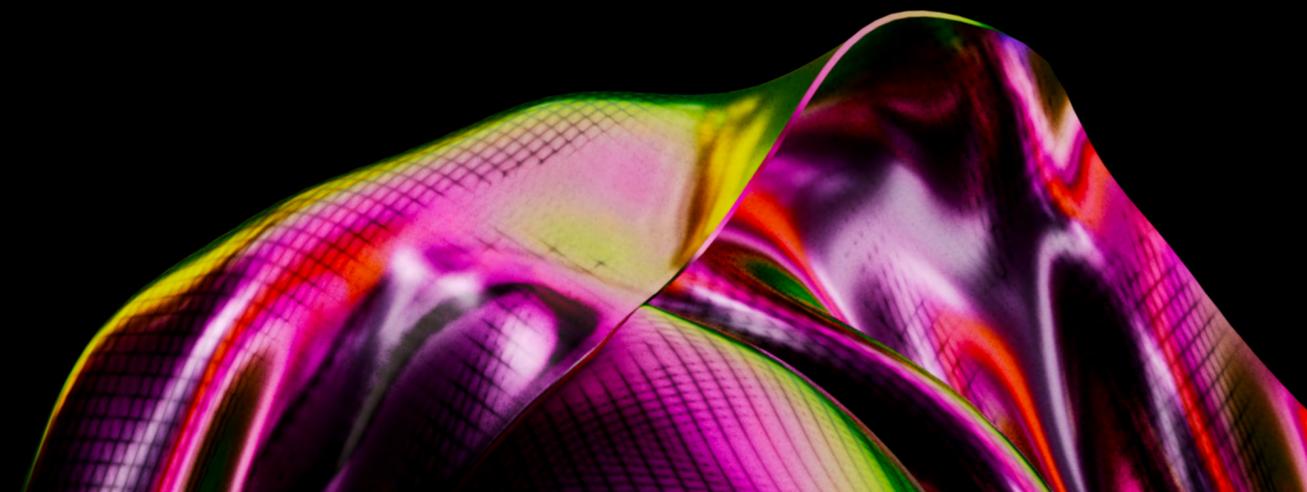
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- @MeganPlays, video creator and Roblox user
- @Lovespun, digital fashion designer on Roblox
- @CoffeeNerd, digital fashion designer on Roblox, focused on Layered Clothing
- @BuilderBoy, digital fashion designer on Roblox

ITEMS FEATURED FROM CREATORS/BRANDS

- Tommy Hilfiger
- Carolina Herrera x @Lovespun
- @BEASTinWHITE
- DressX
- Forever 21

REPORT DESIGN AND 3D ARTWORK

Roblox Creative Studio



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