KANTAR

Finding the Future series

FASHION

GLOBAL REPORT

Our focus

While we recognise that most searches are related to fast or high-street fashion, our focus in this report remains on disruptive trends guided by the unique voices of an emerging, niche consumer base. These consumers have the power to shape and transform the ever-evolving fashion landscape.

Average global monthly searches

220m

SHEIN Primark Zara Muji Uniqlo H&M

Outfit of the Day Fashion Streetwear



What's next on consumers' fashion runway?

1.

Introduction and framework

2.

Consumer needs

3.

Fashion trends 4.

Concluding thoughts

Click to navigate

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Intro

Welcome to Kantar's Finding the Future series, your guide to the latest global trends.

Powered by Kantar's proprietary Dx Analytics toolkit, we apply Al and analytics on big data (search and social) to identify emerging trends at speed and scale.

By layering human insight and Kantar's trends framework, we identify growth opportunities for brands across markets, languages, and categories in real time. In this issue, we immerse ourselves into the world of fashion whilst also rooting ourselves firmly into the evolving context of consumer needs unearthed from our previous three reports.

Join us as we take you on the journey to discover how consumer needs transfer across categories and manifest into trends!

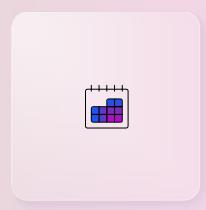


Introduction and framework

How we

We looked at over **2.5b Google searches** linked to 113+ topics spanning 4,888 trends globally over a span of five years to uncover emerging trends.

We've anchored our findings in the ever-changing landscape of consumer preferences, drawing on our recent reports to anticipate trends shaping the future of fashion.









2018-2023

Time period

2023

Predicted data

2.5 billion

Data points

4,882

Number of search trends evaluated

Introduction and framework

Kantar trends framework

Macro drivers

Discrete, measurable and sustained forces that change and shape the consumer landscape.

Organised by:

⊕='

The consumer

Social, technological, environmental, economical, political, and wellbeing drivers.

Data sources:

Includes government data, news reports and industry sector information.

How to use:

Useful for thinking about overall business and growth strategy.

Category/Product expressions

Leading-edge manifestations of energy in any market. Includes types of products, benefits and ingredients.

Organised by:

New products, services, subcultures, messaging campaigns, etc.

Data sources:

Social and search, panel and industry data.

How to use:

Product innovation, renovation and communications.

Leverages Kantar's proprietary Dx Analytics toolkit powered by big data and Al

Consumer trends

The result of shifts in consumer expectations, attitudes, and needs in response to the macro drivers at play.

Organised by:

Protection, wellbeing, connections, identity, experiences, flow, status, and responsibility.

Data sources: Attitudinal and

values surveys, social data.

How to use:

For brand strategy and positioning, marketing communications and content creation.

Leveraging Global MONITOR, Kantar's proprietary attitudinal database

Consumer needs driving the narrative on fashion trends

A recap of the key consumer needs that shape trends

We achieve this by drawing upon the valuable insights gathered from our previous three *Finding* the *Future* reports.

SUSTAINABILITY REPORT

NEEDS: HEALTH, ENABLE, AND ENVIRONMENT

October 2022

Trends:

- Time to bring renewable energy to the household
- Microplastics, the new concern
- Biodynamic and soil health on the radar
- Show me the money: green bonds
- Biodiversity gains traction

FOOD REPORT

NEEDS: EXPERIENCE, HEALTH, AND ENVIRONMENT

March 2023

Trends:

- Cognitive reloaded
- Precision nutrition
- Gut health is life
- The great sugar debate
- Swicy, new flavour profile
- Sea plants are the new superfoods
- Ancestral ingredients pivot from Asia
- Plant-based bolsters, the protein narrative
- Rethinking home cooking steams ahead
- Sustainability gets granular

TECH-ENABLED LIFE REPORT

NEEDS: ENTERTAIN, ENABLE, AND PROTECT

July 2023

Trends:

- Tech gets conversational
- Health on me
- Harmonising integration within the smart home
- Ushering in the era of advanced connectivity
- Privacy and protection
- Gaming redefined

Consumer needs 8

How do these needs manifest to fashion trends?

1.

WELLBEING

Pursuit of **healthy fashion** to support wellbeing goals

2.

INCLUSION AND DIVERSITY

Modest fashion: breaking **stereotypes**, inspiring **diversity** **5.**

SUSTAINABILITY

Prioritising **sustainable and next-gen materials** whilst promoting second-hand markets

Pursuit of healthy fashion to support wellbeing goals

The spotlight on chemicals and the fight against toxic textiles for health

3.7m

Average global monthly searches

THE MACRO CONTEXT

10%

of microplastics dispersed in the ocean each year come from textiles ¹

+50%

Chemical free clothing (YoY growth)

Source: Google trends

8k

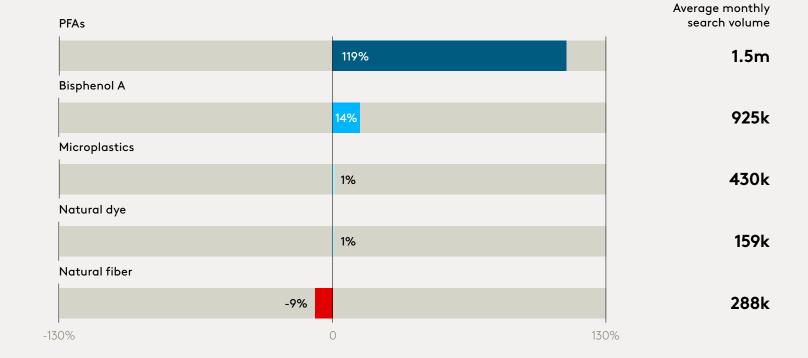
Synthetic chemicals are commonly used to produce clothes ²

+150%

Bluesign certified (YoY growth)

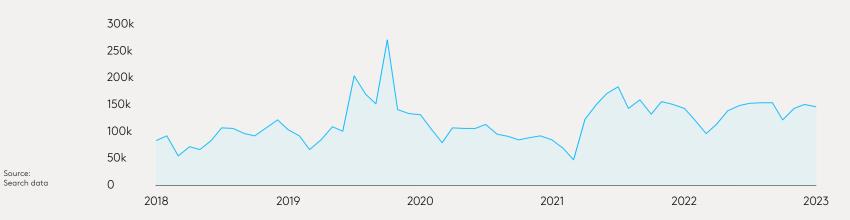


TOPICS THAT DISRUPT RANKED BY GROWTH



INTEREST IN NATURAL DYE

Source: Search data



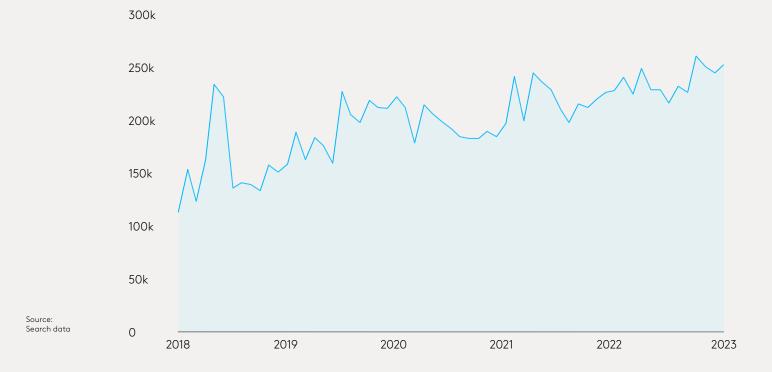
Consumer need

In line with consumer expectations from sustainability, food, and tech the consciousness around clean and ethical in fashion is gaining momentum. All eyes are on the entire supply chain as consumers seek greater transparency for their health and wellbeing.

Therefore what lies ahead?

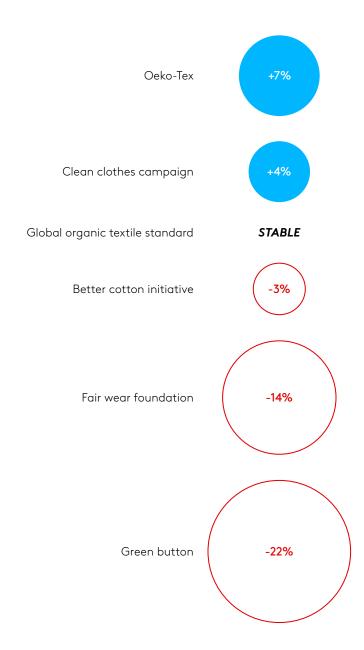
Considering the forthcoming legislation around the Digital Product Passport (EU), brands must actively consider creating a system to track and trace products. Will innovation around products and textile answer the need for reassurance on fashion's impact on the planet, and on individual health?

INTEREST IN OEKO TEX



TOPICS DRIVING THE TREND BY GROWTH

Source: Search data



Introducing the clean junkie

THE CONSUMER BEHIND THE TREND

About

Clean credentials become foremost as consumers increasingly focus on the ingredient story of their fabric. They recognise that it is not only what one eats and drinks but also what one wears.

Key needs

A desire for efficiency drives their choices.

Demographic

Skews toward women aged across a mature age cohort of 44-65 years old.

Interests

Poetry, travel and jewellery are a priority.

Fashion topics

- Synthetic-chemical
- Forever-chemicals
- Stain-resistant
- Toxic-clothing
- TributylAzo-dyes
- PFAs
- BPAs

Social networks

12.17x*	• Medium
3.42x	Spotify
1.27x	facebook
1.25x	X

*Interpreted as Medium is 12.17 more relevant to this segment compared to the full fashion audience collected for this report.

"I am obsessed with this conscious luxury dress I saw. It is made from algae-based sequins and carbon neutral fabric."

Social expressions



How brands are already innovating to address this trend



Water from Mars has a 100% plastic-free top that uses 55% True Hemp and 45% Tencel fabric. The buttons are made of tagua nut, and we used 100% cotton thread for sewing. Labels are also woven using organic cotton. When washed, this shirt releases zero microplastic particles ⁴.



Oeko-Tex: Suppose a textile article carries the standard 100 label. In that case, you can be sure that every component of this article, i.e., every thread, button, and other accessories, has been tested for harmful substances and that the article is harmless for human health ³.



Olderbrother: Our seasonal products are up-cycled from our defects and scraps. One-of-a-kind pieces that have been repaired and re-envisioned. Wild silk, hemp, and linen dyed with Kelp, all repurposed with indigo and sun bleaching ⁵.

Modest fashion that breaks stereotypes and inspire diversity

Transcending cultures: a symbol of empowerment, self-expression and inclusivity



24m

Average global monthly searches

THE MACRO CONTEXT

\$88.3b 2.2b

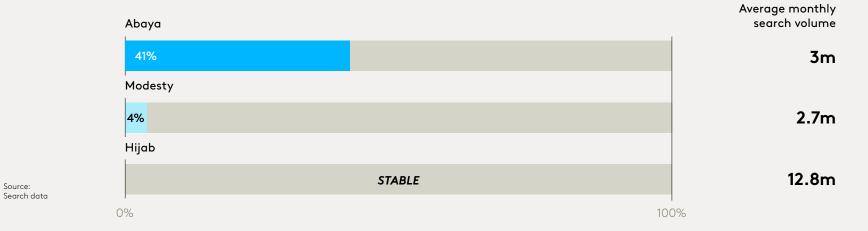
Halal market forecasted worth by 2025 ⁶

Muslim population projection 2030 ⁷

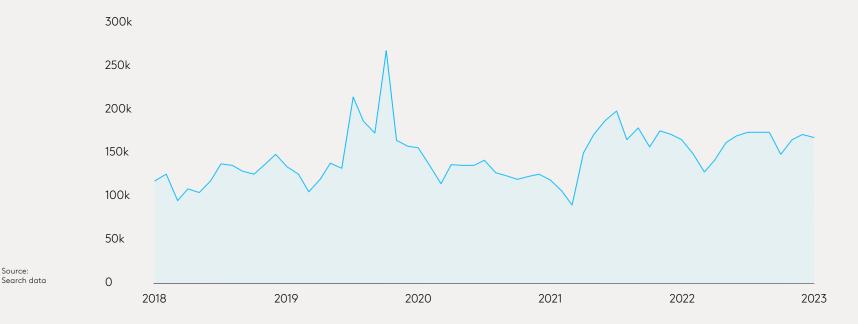
Pushing the creative boundaries by a style conscious cohort vested in appearance.



TOPICS DRIVING THE TREND



INTEREST IN HIJAB



Consumer need

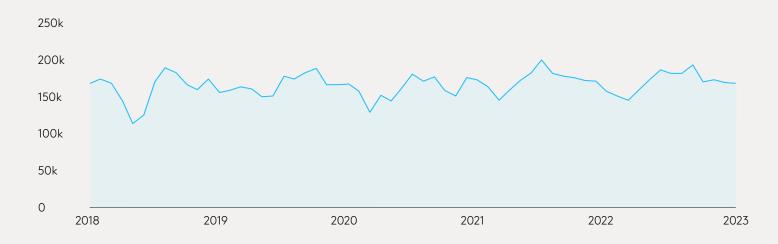
A fashion-forward approach where women are challenging conventional norms to confidently embrace unique identities and shatter preconceived notions by proving that authenticity needs to be celebrated and modesty can coexist with style.

Therefore what lies ahead?

Continued collaboration between high-end designers and emerging talent to cater to the needs of women who believe their identity encompasses modernity and faith. A style and aesthetics diversification that intertwines culture and heritage into a distinct style.

INTEREST IN MODEST FASHION

Source: Search data



BRANDS AND INFLUENCERS DISTRUPTING (YoY GROWTH)

Source: Search data

+64%

+45%

+28%

+13%

V E L A

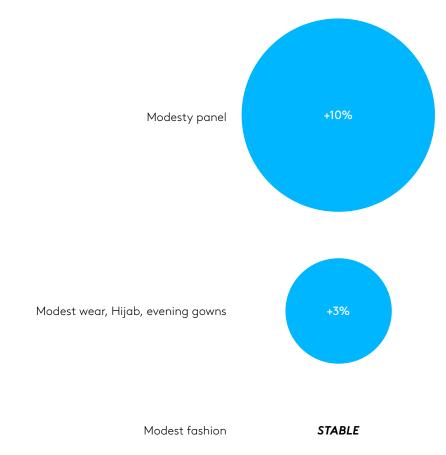
ZAHRAA

Noor Tagouri

aab

TOPICS THAT DISRUPT RANKED BY GROWTH

Source: Search data



Haute Hijab **NEW**

Introducing the modest groupie

THE CONSUMER BEHIND THE TREND

About

A rising cohort of consumers choosing to dress conservatively but with panache. Bold, fierce, and unafraid to own their individuality within the boundaries that they have set for themselves.

Personality

Likes to challenge authority and traditional values to bring about positive change.

Demographic

Skews toward women across 13-54 years old.

Interests

Intrigued by hip-hop music and culture. They are also fascinated with accessories and shoes.

Fashion topics

- Fashion
- Muslim
- Conservative
- Islamic
- Influencers
- Modest
- Hijab

Social networks

17x*	Discore
13x	d TikTok
13x	Spotify

*Interpreted as Discord is 17 more relevant to this segment compared to the full fashion audience collected for this report.

"Some of us like modesty or having options; if only there were some real options out there to represent us in our true nature."

Social expressions



Prioritising sustainable and next-gen materials whilst promoting second-hand markets

The quest to promote circular economy



Average global monthly searches for sustainable and next gen materials

THE MACRO CONTEXT

\$10.2b 8.3%

Market for ethical fashion expected to grow in 2026* Annual growth rate*

Average global monthly searches for second-hand clothing market

THE MACRO CONTEXT

23%

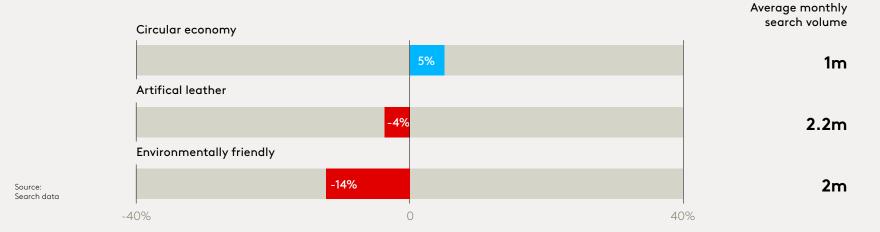
\$350b

Expected market share (second-hand apparel) in 2030 from current 35%*

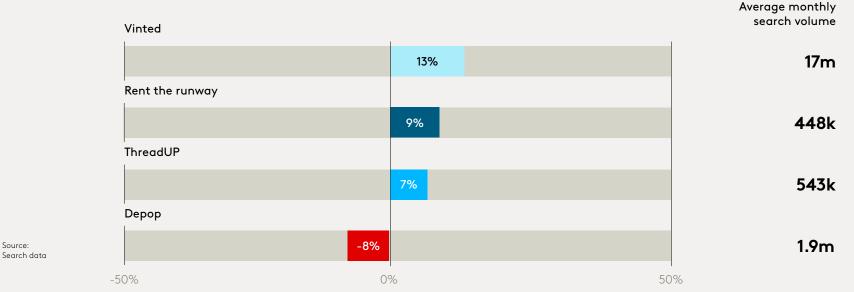
Expected market size to double by 2027*

Preloved fashion moves from the fringes of society to mainstream as consumers make a statement and resist one of the most polluting industries.

TOPICS DRIVING THE TREND FOR SUSTAINABLE AND NEXT GEN MATERIALS



TOPICS DRIVING THE TREND FOR SECOND-HAND CLOTHING MARKET



Consumer need

Consumers have started questioning the virtues of faux/synthetic leather, considering it is not biodegradable and releases harmful chemicals into the environment during production. Interest in vegetable-based faux/synthetic leather, such as mushroom mycelium, is rising as a cohort of consumers seek alternatives to animal leather. A blanket environmentally friendly stamp is no longer good enough to assure consumers of ethical and environmental concerns. They want the back story of the materials that go into the production of fashion and its impact on not just themselves but also the planet. There is excitement around the possibilities of next-generation material like spider silk and the developments around it.

Amidst this, consumers are also welcoming the second-hand clothing market. Shoppers are increasingly turning to preloved items for multiple reasons. Firstly, many are actively trying to save money by tightening their belts. Secondly, they are lured by the excitement of discovering something unique as they grow tired of the typical high street collection. Finally, the destigmatisation of second-hand shopping has encouraged more people to embrace preloved items.

Therefore what lies ahead?

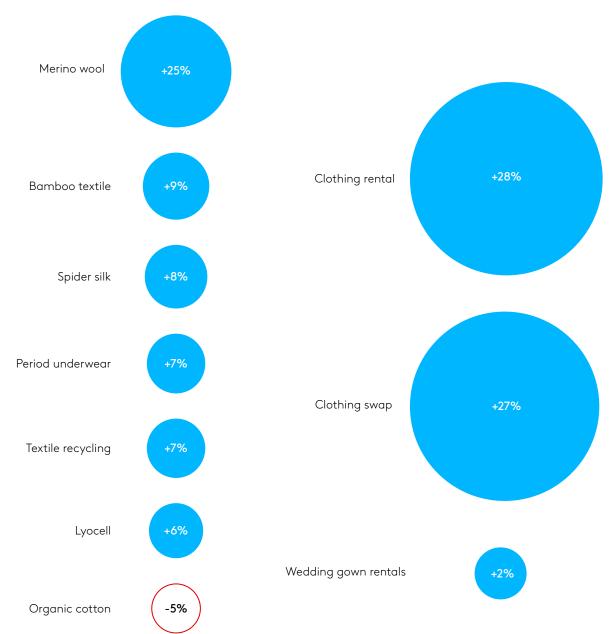
Brands must invest in their raw materials strategy in response to consumer scrutiny and the evolving climate policy landscape. Beyond traceability, diversification of their material portfolio is crucial for future-proofing.

Parallelly, brands should strategically explore the burgeoning resale marketplace by establishing dedicated sub-brands focused on preowned and preloved items. This approach offers a compelling opportunity to not only extend the lifespan of clothing and embrace circular fashion principles but also connect with a value-conscious consumer segment.



TOPICS THAT DISRUPT RANKED BY GROWTH

Source: Search data



Introducing the sustainability advocate

THE CONSUMER BEHIND THE TREND

About

The conscious consumer who is looking for sustainable alternatives and demanding a change in how clothes are manufactured.

Values

These consumers think it is essential to take care of people around them.

Demographic

Skews women, particularly Gen Z's and Millennials.

Interests

Ecology and energy are areas of interest that are actively explored in design beyond aesthetics.

Fashion topics

- Global-organic-textile-standard
- Eco-friendly-dyeing-printing
- Fair-wages
- Recycled-polyester
- Organic-cotton
- Hemp
- Vegan-leather

Social networks

5.43x*	Linked in
2.79x	• Medium
2.58x	Pinterest
1.83x	♂ TikTok

^{*}Interpreted as LinkedIn is 5.43 more relevant to this segment compared to the full fashion audience collected for this report.

"Love Yak fiber as a sustainable alternative to cashmere."

Social expressions



Introducing the thrifters

THE CONSUMER BEHIND THE TREND

About

Value-seeking consumers who are grappling with rising costs but also genuinely embracing the environmentally friendly option it offers.

Personality

They are active, social and genial, and enjoy a fast-paced busy schedule with many activities.

Demographic

Skews predominantly females in the 13–34 age cohort.

Interests

Always on the hunt for a good deal, they follow and partake in auctions and needlework.

Fashion topics

- Rented clothes
- Thrift haul
- Preloved
- Second-hand clothes
- Sustainable fashion
- Poshmark seller

Social networks

1.7x*	Pinterest
1.5x	\bigcirc
1.4x	O
1.3x	♂ TikTok

^{*}Interpreted as Pinterest is 1.7 more relevant to this segment compared to the full fashion audience collected for this report.

"I save money by shopping at swap meets, thrift stores, yard sales, dead stock stores, or eBay. The options are endless!"

Social expressions



How brands are already innovating to address this trend



A new sweater from **Goldwin and Spiber** looks like wool, but the yarn partially came from a bioreactor, not a sheep. The new material, "Brewed Protein," is designed to mimic standard fabrics while shrinking their environmental footprint.

H&M FOUNDATION

H&M Foundation unveils clothing with ${\rm CO_2}$ capture properties. Non-profit H&M Foundation and The Hong Kong Research Institute of Textiles and Apparel (HKRITA) have unveiled cotton garments that capture ${\rm CO_2}$ from the air and release it as plant nutrition.

24

Concluding thoughts

"In the dynamic landscape of UK fashion, many narrative trends are being re-woven, ushering in a new era where sustainability, inclusivity and individuality will take centre stage."



Jodie Gillary
Head of Client Impact
Kantar

It's hard to be out of fashion these days. In an era where anything goes and everything is instantly available, the big topics of interest have shifted from seasonal style predictions to more socially pertinent issues like inclusivity, sustainability and the importance of identity.

Pre-loved: Bridging the say-do gap or accidentally sustainable?

There's no doubt that sustainable fashion has found its voice, resonating with a growing audience concerned about the environmental impact of their choices. Yet, there remains a gap between what consumers say they want and what they actually do, as evidenced by the continued popularity of fast fashion giants like Boohoo and Shein who have both been called out for their unethical processes. In fact, Shein were the 5th most valuable global brand in our annual BRANDZ ranking with around 17.4 million average monthly searches and a 5818% long growth (growth across 2 years) as indicated on the Emerging Trends dashboard, highlighting that consumer demand is still very much driving their success. Alongside this, the rise of re-sale platforms like Vinted and De-pop has been instrumental in the re-brand of second hand to pre-loved. Unlike a charity shop, these marketplaces allow the seller to tell the item's backstory: e.g. 'worn once for a party' or 'bought but really needed the next size up', and this accompanying

narrative delivers a marker of quality as well as an increased sense of bargain.

However, whilst the sustainability angle is clear, is it an accidental by-product rather than the primary motive for selling? Many of the items listed are new and unloved, allowing sellers to claw back some of their 'ill advised' expenditure, and buyers to simply snap up this season's items at a fraction of the RRP.



Inclusivity – The four 'isms' making waves:

As such, the fashion industry is witnessing a rebellion against ableism, ageism, sizeism, and sexism. Retailers are being called out for their inaction or lack of representation and whilst it's mostly smaller independent brands driving inclusivity, we are starting to see the impact more widely.

Brands like Good American, recognising that body shapes can fluctuate on a regular basis, are leading the way with innovations such as jeans that stretch up to 4 sizes.

Other premium brands like ME+EM are acknowledging this with adjustable waistbands whilst the high street has more 'one size' items that simply create a different fit depending on your body shape and can be cinched in where required.

Never Fully Dressed is an example of an independent UK brand born out of the desire to create versatile looks with a single item that is often draped and therefore designed to fit a wide range of bodies. At a lower price point, ASOS have also been quick to showcase quirky, streetwear inspired gender inclusive brands where the same items are shown modelled on male and female bodies.

You are what you wear: The role of Identity

In a world of 'dupes', Pinterest, and online fast fashion, the gap has closed between the haves and have nots. Anyone can access designer styles, whether it's the real deal or a legitimate copy. It should therefore be easier than ever to carve out the identity you want. Except it isn't. With there being fewer short term trends to latch onto, there is more pressure on people to develop and define their own personal style, something which many find challenging especially in a post pandemic world where dress codes have been irrevocably altered and many have struggled to find their style voice in this new landscape.

In summary: What does this all mean for you?

The journey ahead is one of continual evolution and the topics discussed will be integral components of a more conscious and diverse fashion landscape. Ultimately, fashion remains a canvas for self-expression that transcends age, size, societal norms and even worlds.

As these different intersections collide, it can be hard to prioritise the direction in which to take your brand. What's clear is that fashion marketers and Insight teams hold the power to become the change agents and show up for the people they represent. Whether it's luxury or mainstream, how brands connect with people on the issues above will determine their future success.

Speak to us to find out what people are actually looking for in this space and how your brands can engage with them in a more meaningful way.

Jodie Gillary is Head of Client Impact at Kantar and also a certified Personal Style CoachTM. In 2023 she published the book 'How to stop spending money you don't have on clothes you don't wear' which applies the principles of brand building to wardrobe management.



Special thanks and appreciation to:

Jodie Gillary

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