

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

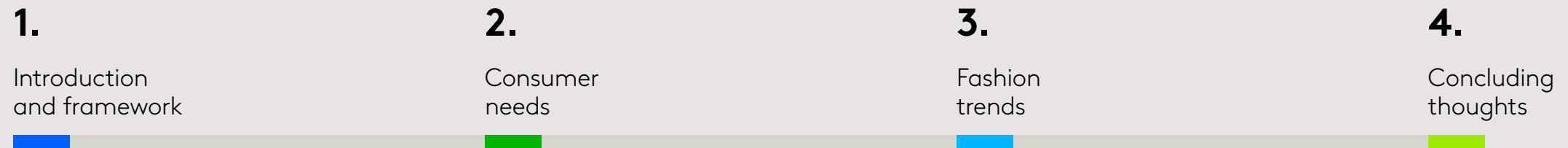
SHEIN
Primark
Zara

Muji
Uniqlo
H&M

Outfit of the Day
Fashion
Streetwear



What's next on consumers' fashion runway?



Click to navigate



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 AI 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.

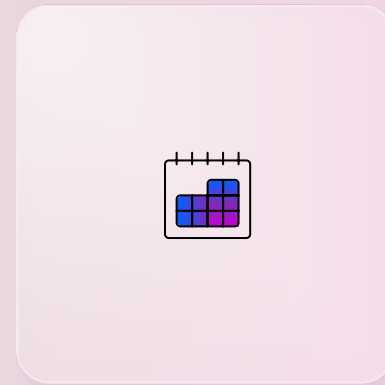
Join us as we take you on the journey to discover how consumer needs transfer across categories and manifest into trends!



How we did it

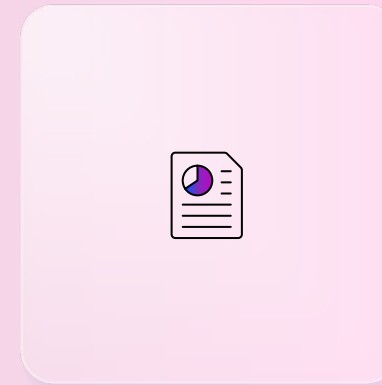
We looked at over **2.5b Google searches** linked to **113+ topics** spanning **4,888 trends globally** over a span of five years to uncover emerging trends.

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



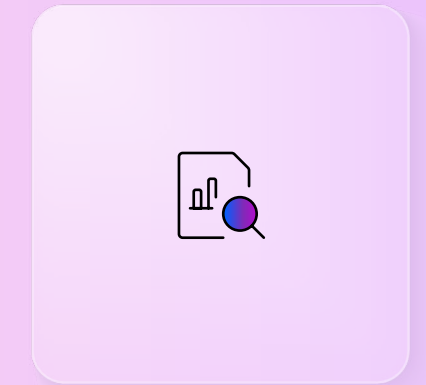
2023

Predicted data



2.5 billion

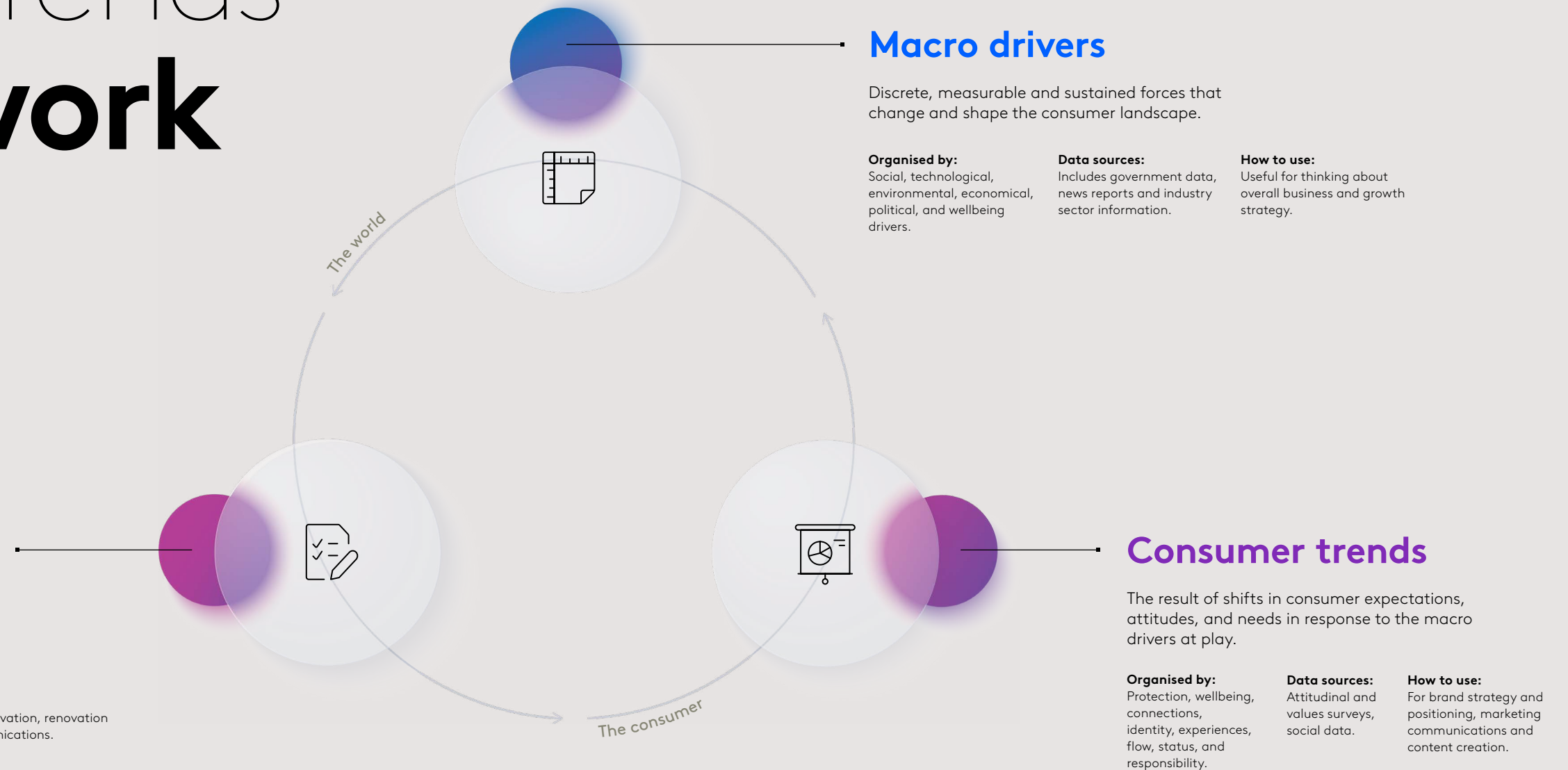
Data points



4,882

Number of search trends evaluated

Kantar trends framework



Macro drivers

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

Organised by:

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.

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.

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

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

How do these needs manifest to **fashion trends?**

1.

HEALTH

Pursuit of healthy fashion to support wellbeing goals

2.

ENABLE

Modest fashion that breaks stereotypes and inspire diversity

3.

ENVIRONMENT

Putting sustainable and next-gen materials at the forefront

4.

ENABLE

Bagging bargains on the second-hand scene

5.

ENABLE AND HEALTH

Reimagining the fashion industry with novel tech



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

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

1

3.7m

Average global monthly searches

THE MACRO CONTEXT

10%

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

8k

Synthetic chemicals are commonly used to produce clothes ²

+50%

Chemical free clothing (YoY growth)

Source: Google trends

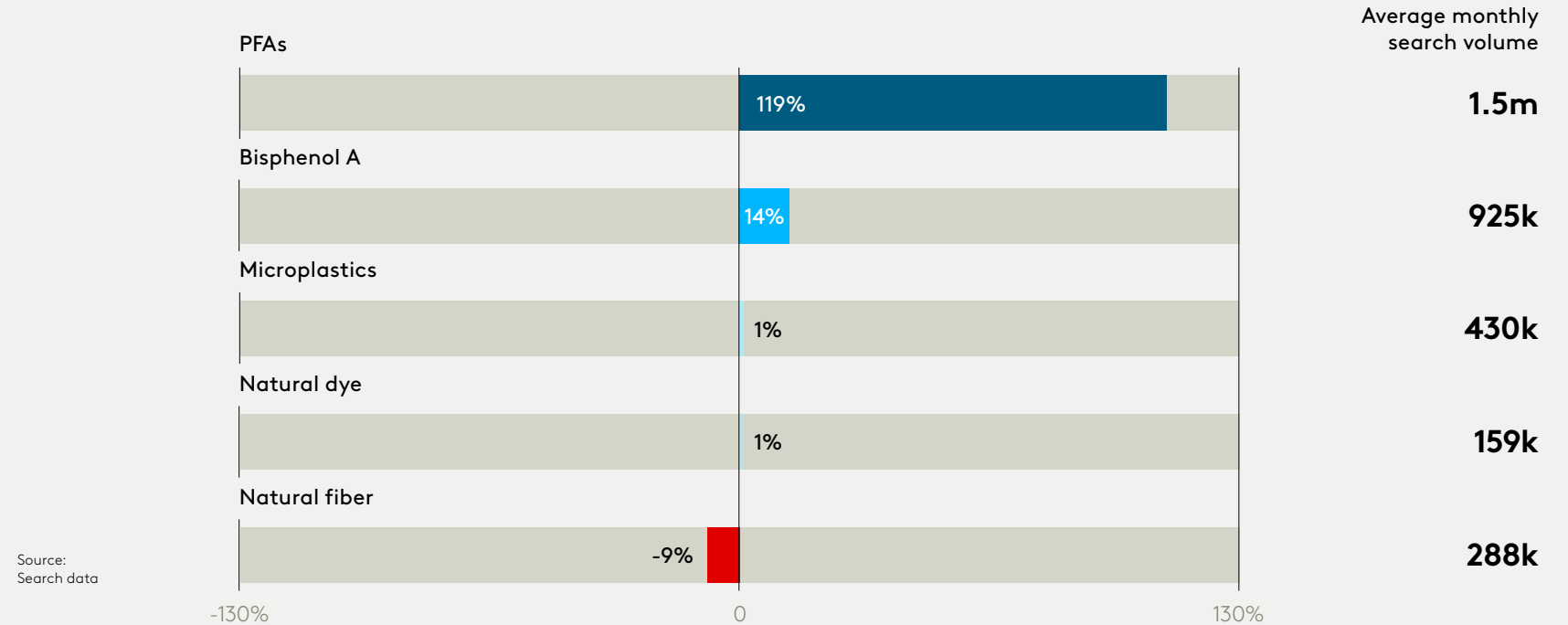
+150%

Bluesign certified (YoY growth)



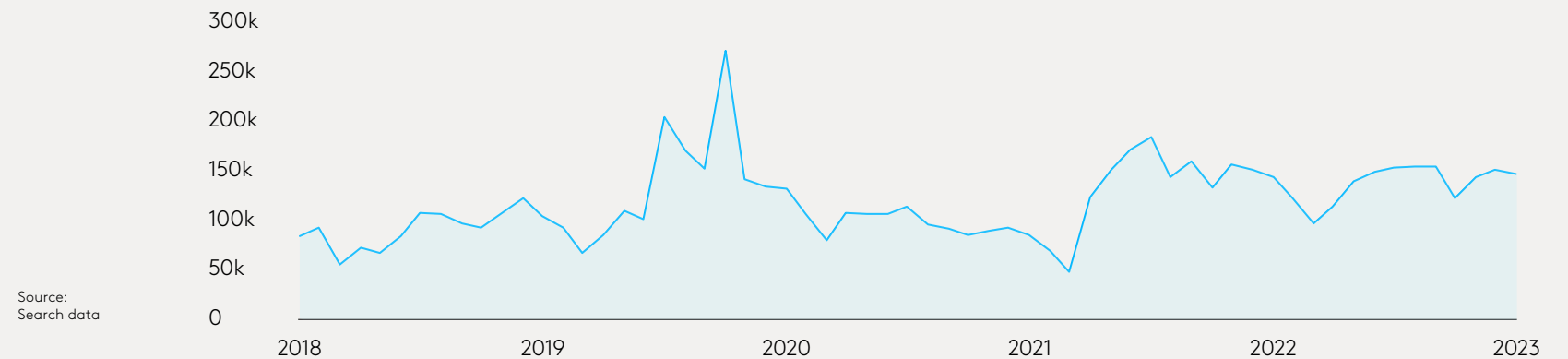
Fashion trends

TOPICS THAT DISRUPT RANKED BY GROWTH



Source: Search data

INTEREST IN NATURAL DYE



Source: Search data

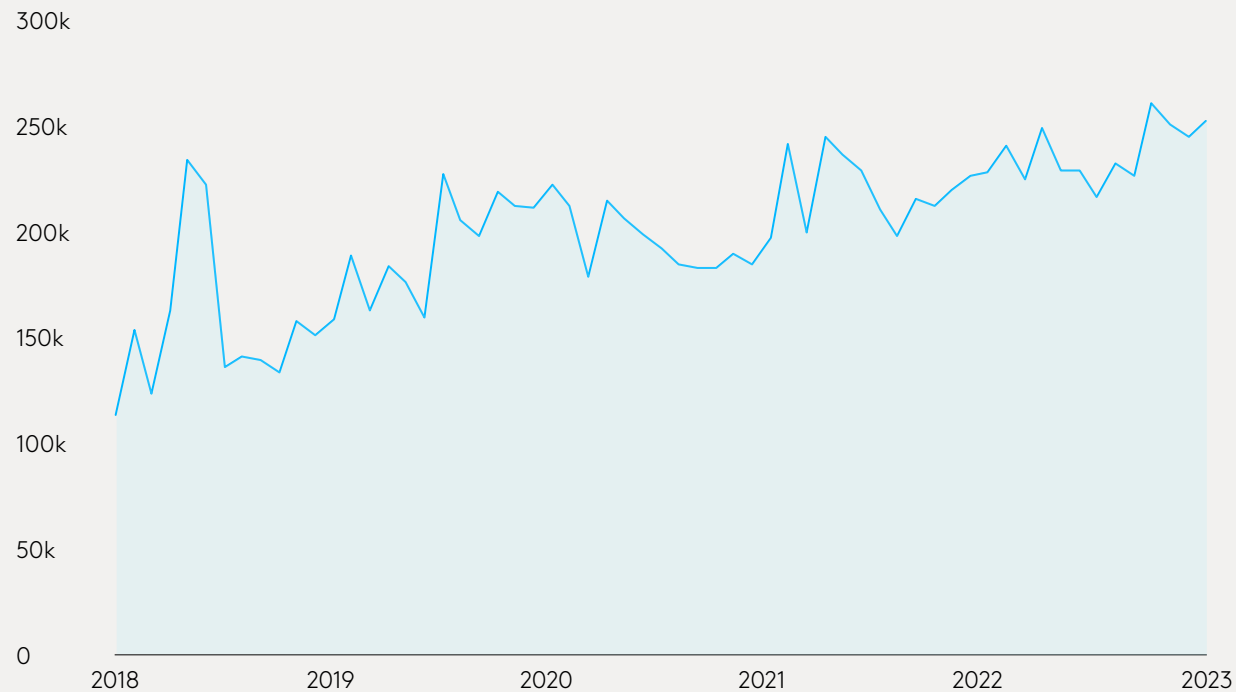
Consumer need

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?

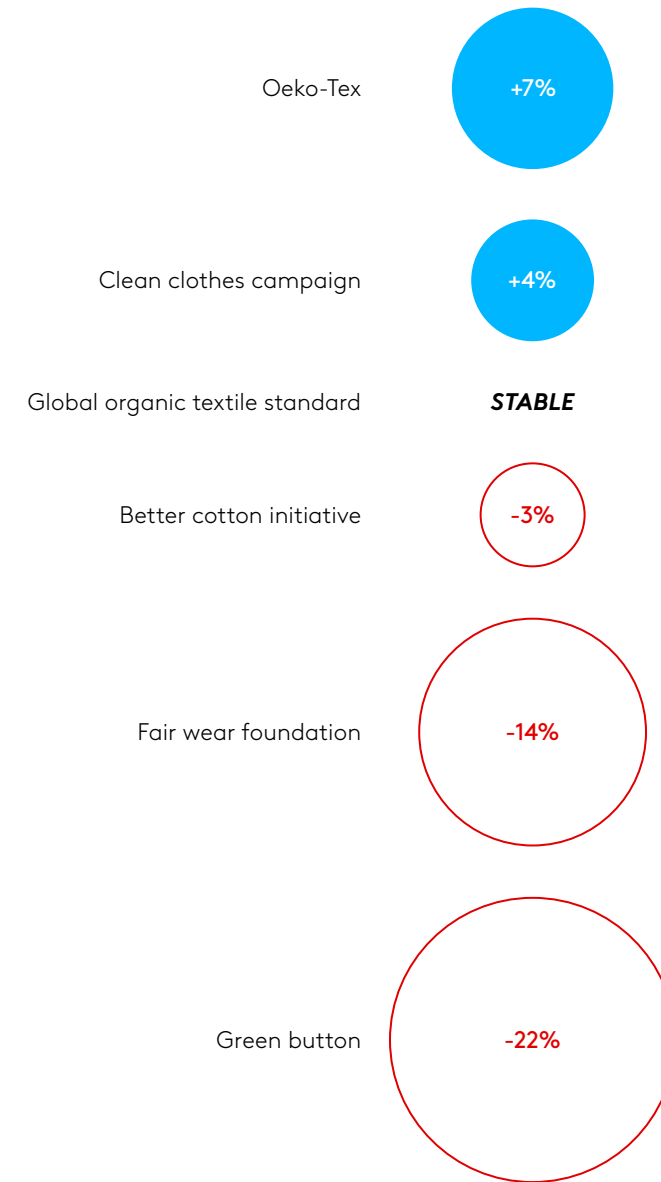
INTEREST IN OEKO TEX



Source: Search data

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 jewelry are a priority.

Fashion topics

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

Social networks

12.17x* 

3.42x 

1.27x 

1.25x 

*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**

2

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



24m

Average global monthly searches

THE MACRO CONTEXT

\$88.3b

Halal market forecasted worth by 2025 ⁶

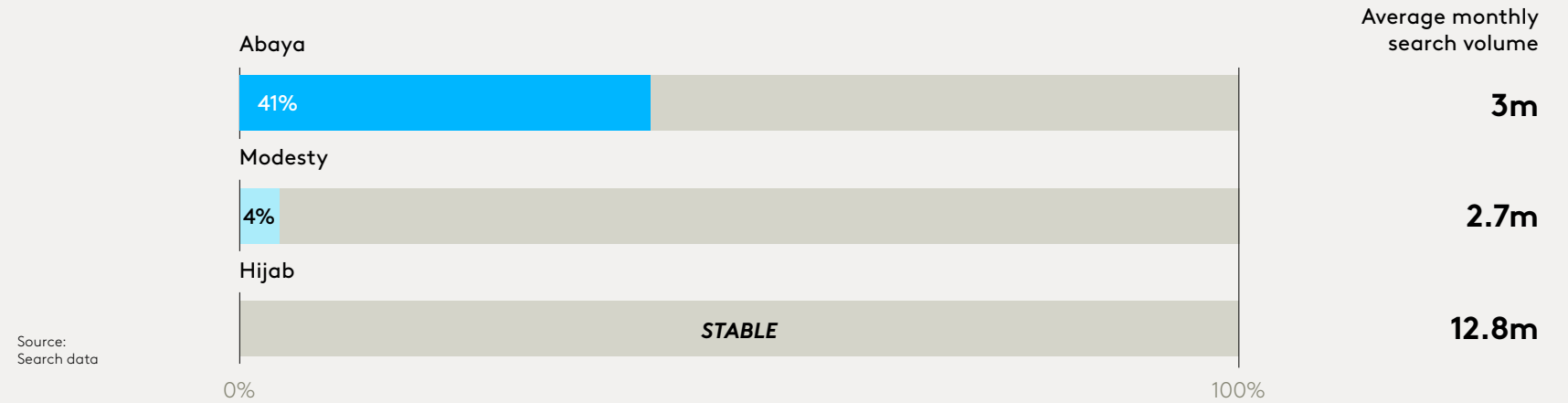
2.2b

Muslim population projection 2030 ⁷

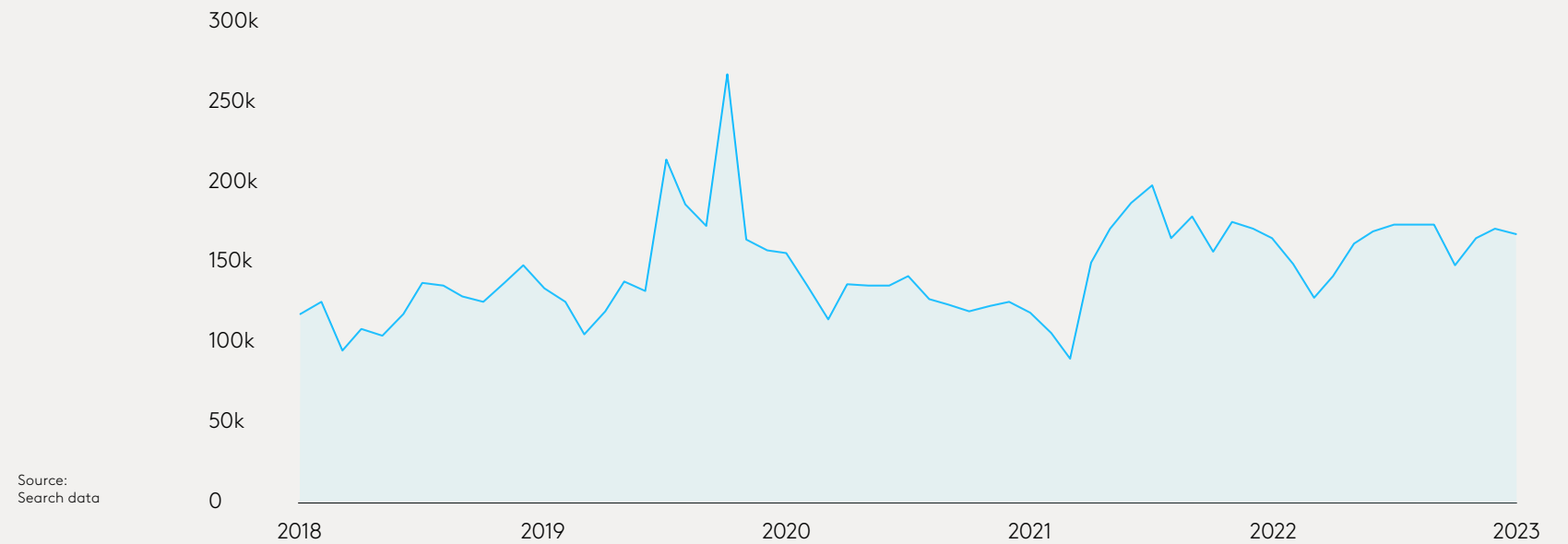
Pushing the creative boundaries by a style conscious cohort vested in appearance.



TOPICS DRIVING THE TREND



INTEREST IN HIJAB



Consumer need

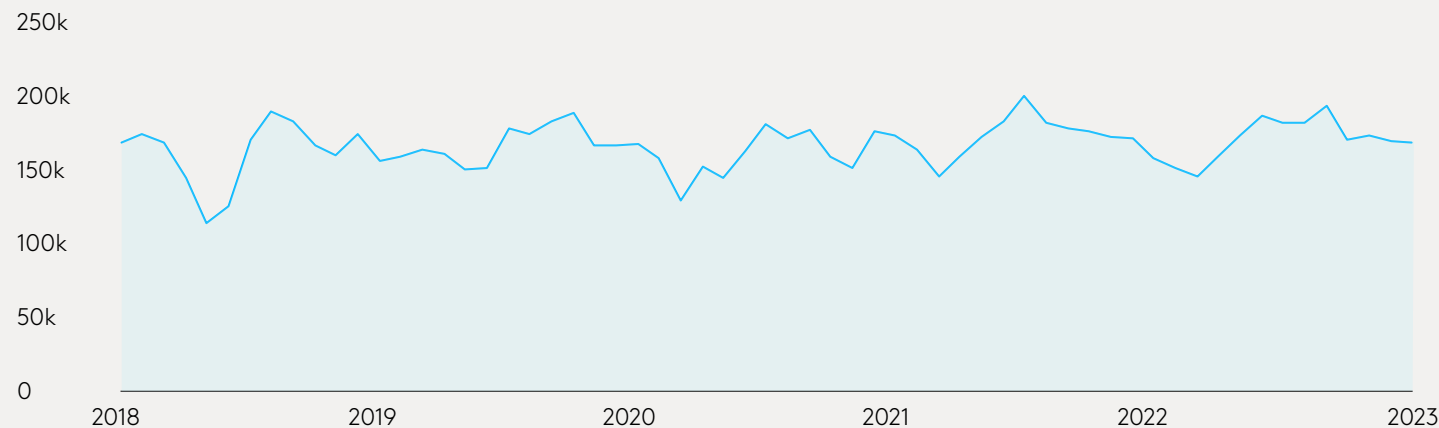
A fashion-forward approach where women are challenging conventional norms to confidently embrace unique identities and shatter preconceived notions by proving that authenticity needs to be celebrated and modesty can coexist with style.

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 DISRUPTING (YoY GROWTH)

Source: Search data

+64%



+45%



+28%

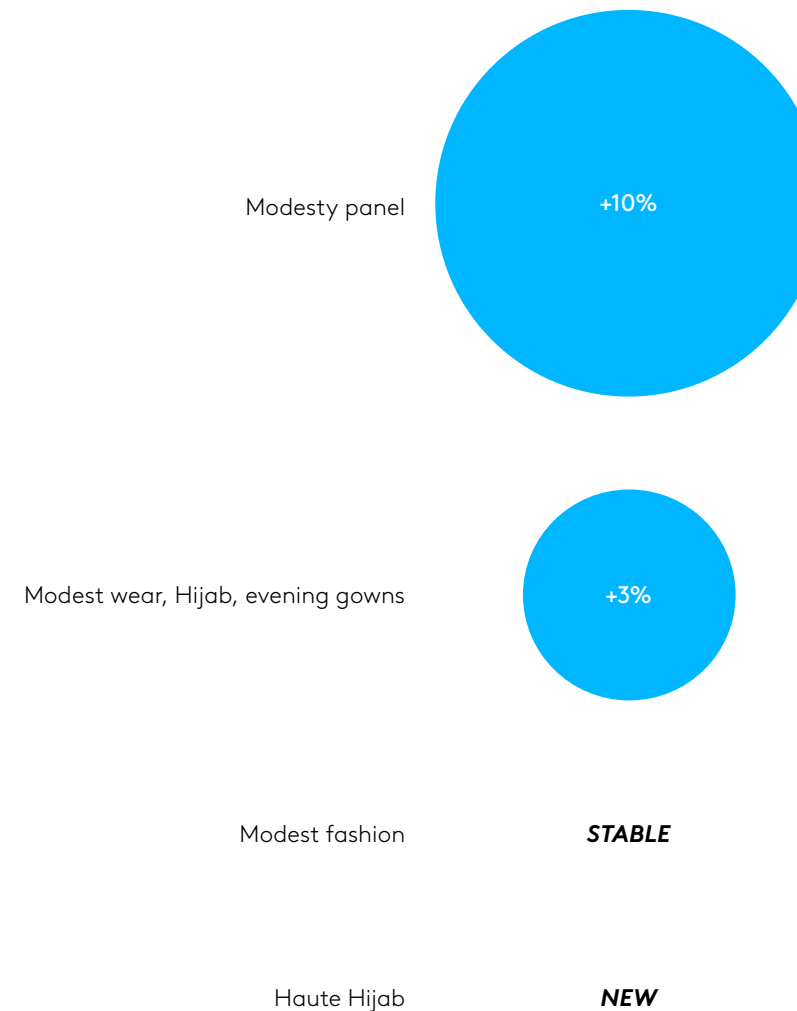
Noor Tagouri

+13%



TOPICS THAT DISRUPT RANKED BY GROWTH

Source: Search data



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*  Discord

13x  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





Putting **sustainable**
and **next-gen** materials
at the forefront

The quest to be fashionably transparent

3

8m

Average global monthly searches

THE MACRO CONTEXT

\$10.2b

Market for ethical fashion expected to grow in 2026* ⁸

8.3%

Annual growth rate* ⁹

+50%

Sustainable leather (YoY growth)

+120%

Mycelium leather (YoY growth)

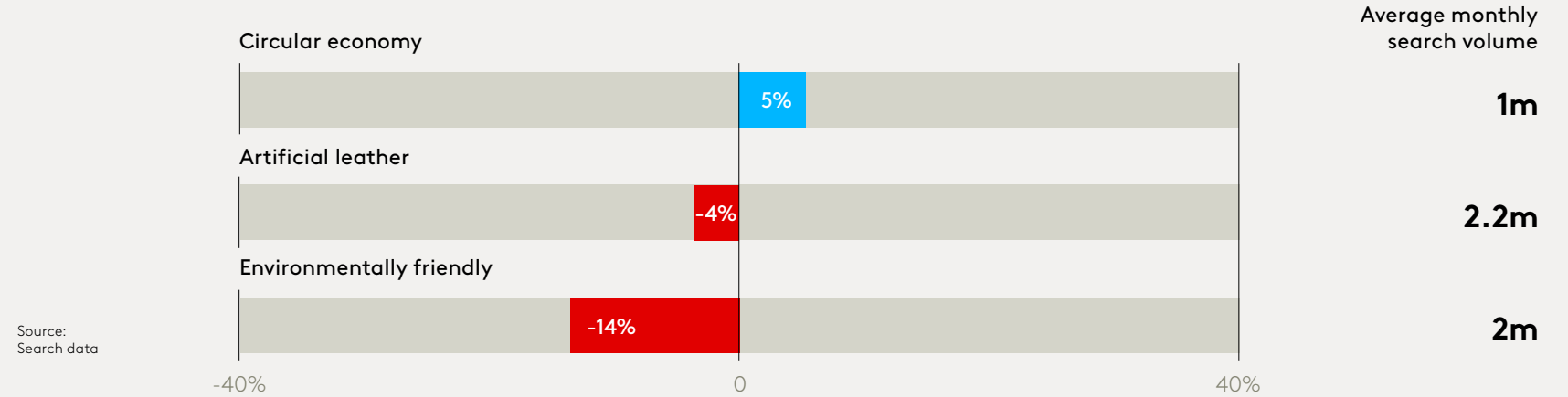
+80%

Mushroom/Vegan leather (YoY growth)

Source: Google trends

 Fashion trends

TOPICS DRIVING THE TREND



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 as consumers seek alternatives to animal leather. A blanket environmentally friendly stamp is no longer good enough to assure consumers of ethical and environmental concerns.



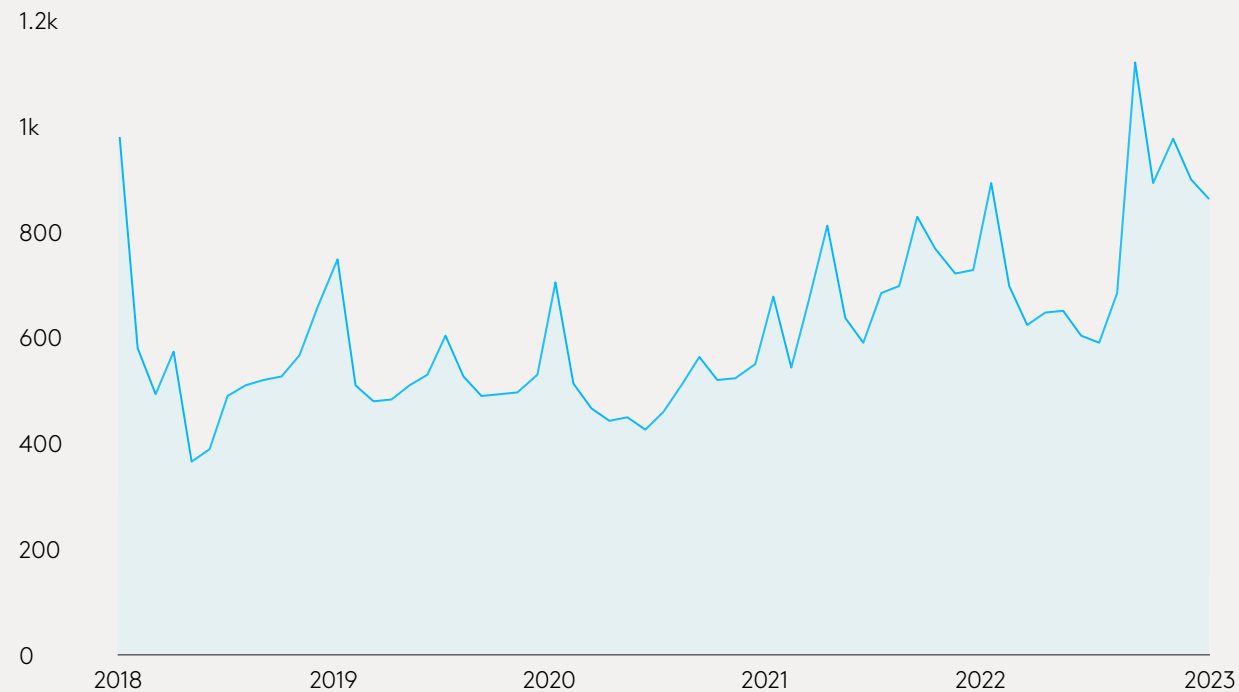
Consumer need

Vested in knowing the back story of the materials that go into the production of fashion and its impact on not just themselves but also the planet. They are excited to learn about the possibilities of next-generation material like spider silk and the developments around it.

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.

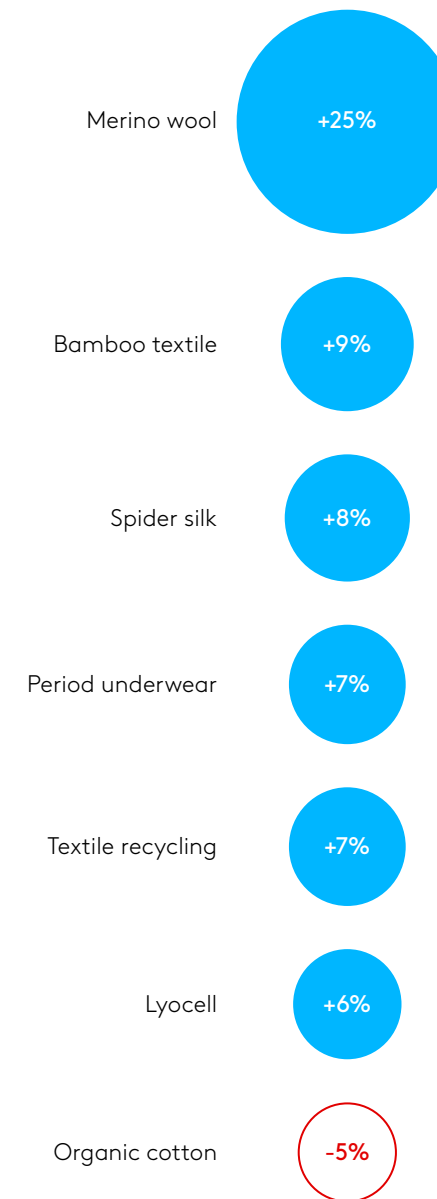
INTEREST IN SPIDER SILK



Source: Search data

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* 

2.79x 

2.58x 

1.83x 

*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



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 CO₂ capture properties. Non-profit H&M Foundation and The Hong Kong Research Institute of Textiles and Apparel (HKRITA) have unveiled cotton garments that capture CO₂ from the air and release it as plant nutrition.



Bagging bargains on the second-hand scene

The emergence of the budget-savvy consumer
amidst shrinking discretionary incomes

4



22m

Average global monthly searches

THE MACRO CONTEXT

23%

Expected market share (second-hand apparel) in 2030 from current 35%*¹⁰

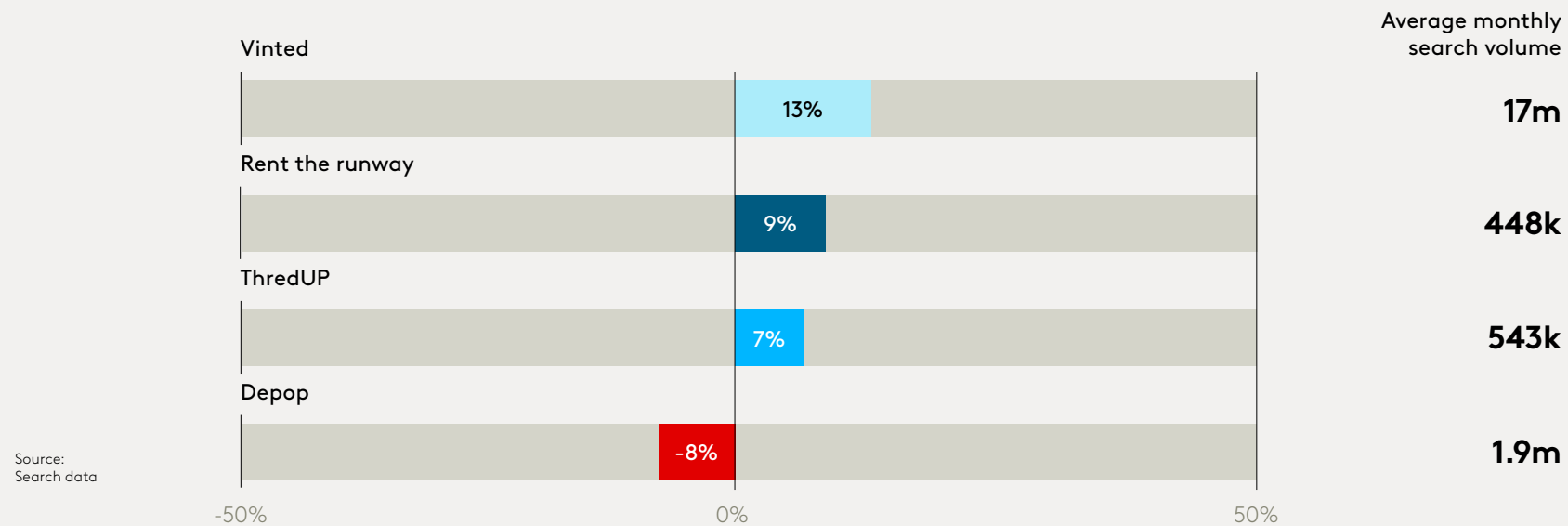
\$350b

Expected market size to double by 2027*¹¹

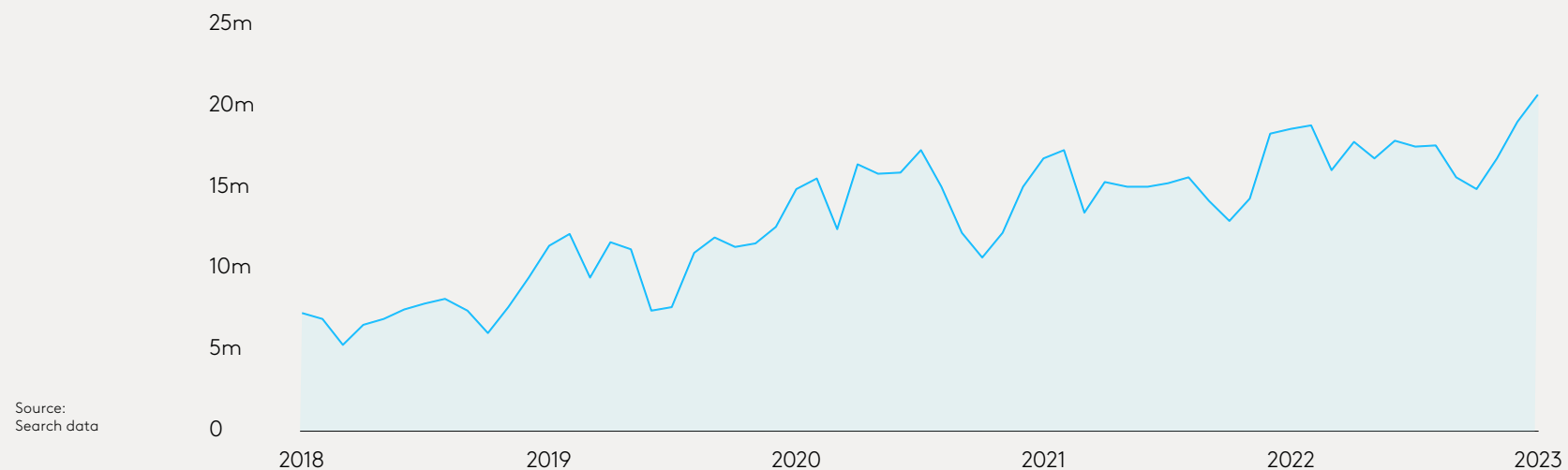
Preloved fashion moves from the fringes of society to mainstream as consumers make a statement and resist one of the most polluting industries.



TOPICS DRIVING THE TREND



INTEREST IN VINTED



Consumer need

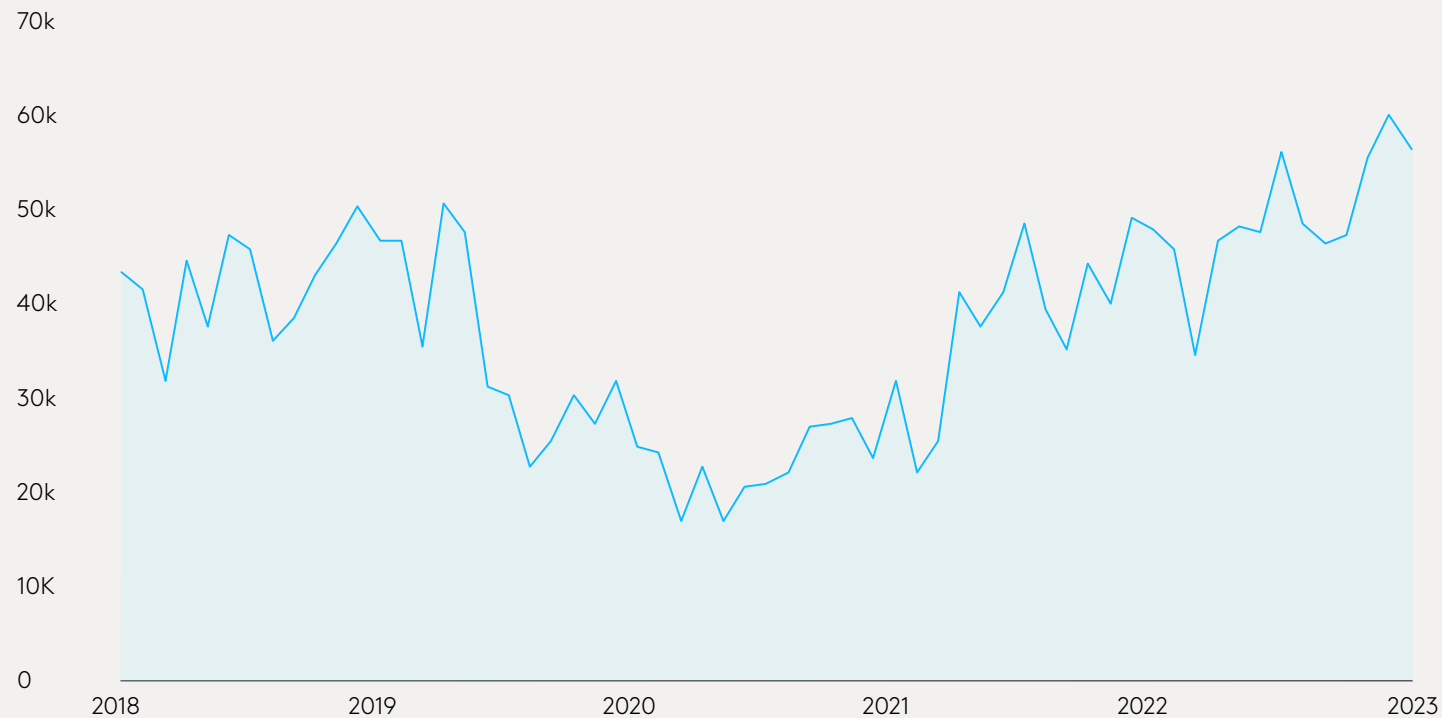
Shoppers are increasingly turning to preloved items for multiple reasons. Firstly, many are actively trying to save money by tightening their belts. Secondly, they are lured by the excitement of discovering something unique as they grow tired of the typical high street collection. Finally, the destigmatisation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

Therefore what lies ahead?

Brands 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.

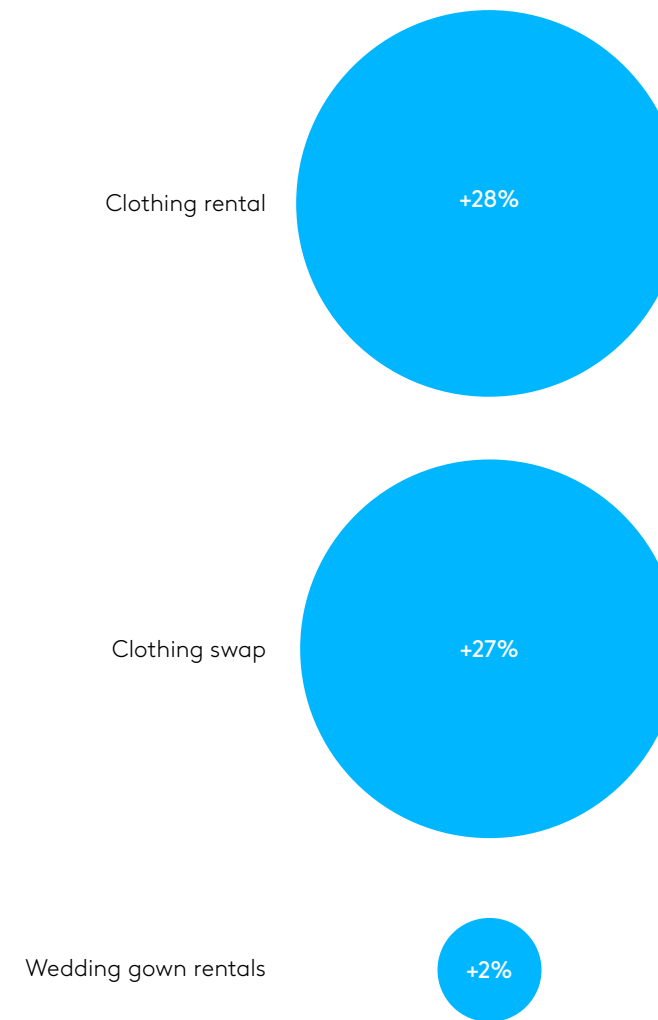
INTEREST IN CLOTHING SWAP

Source: Search data



TOPICS THAT DISRUPT RANKED BY GROWTH

Source: Search data



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*



1.5x



1.4x



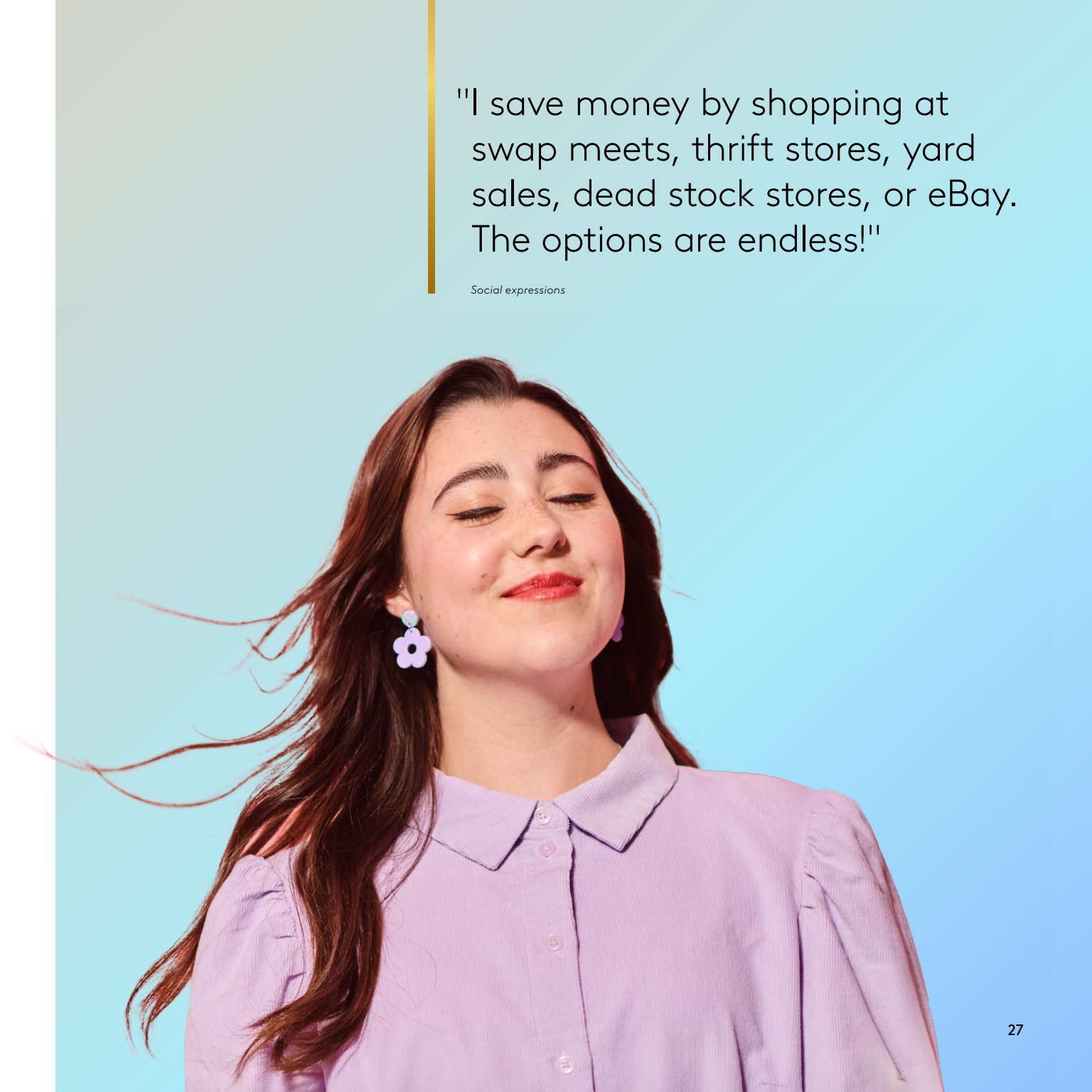
1.3x



*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



Reimagining the
fashion industry
with **novel tech**

Redefining the rules of engagement
with style

5



12m

Average global monthly searches

THE MACRO CONTEXT

\$594b

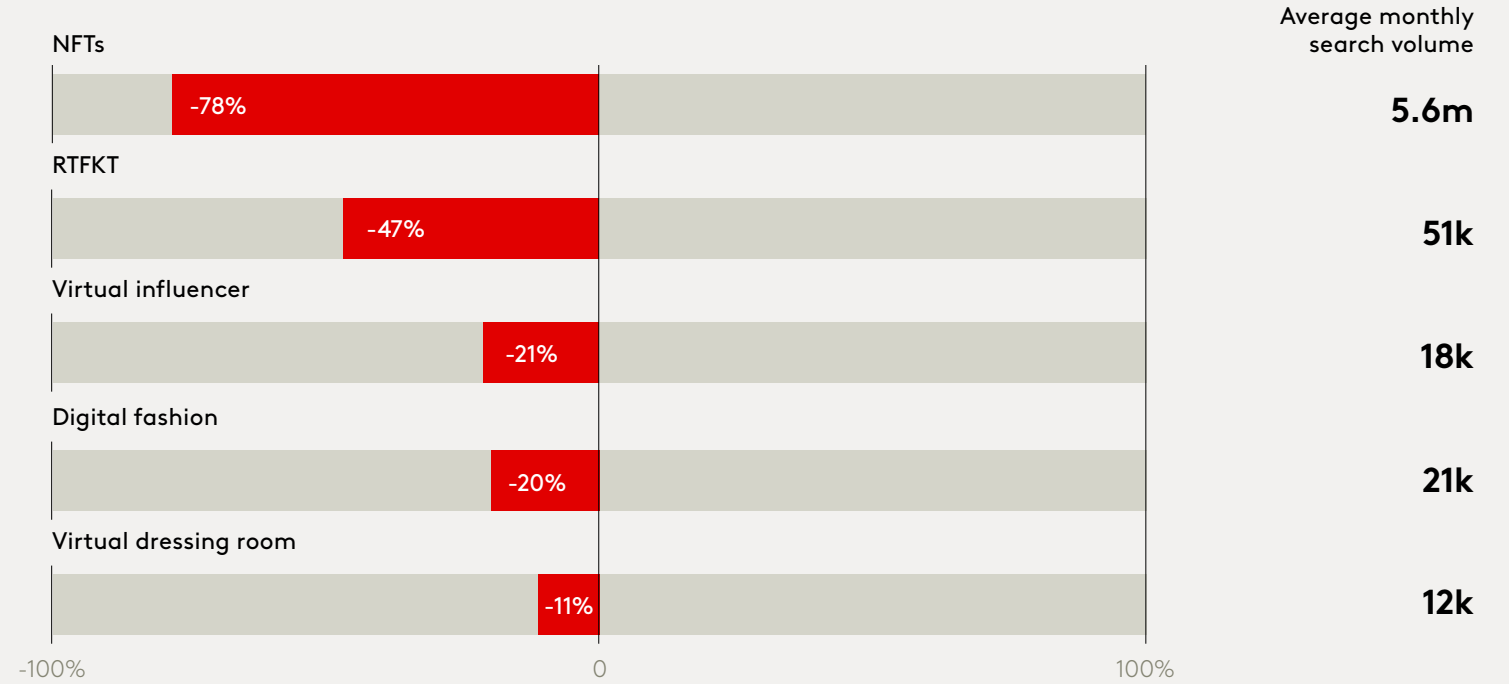
Potential market expenditure of the apparel sector in the metaverse in the U.S.¹²

\$14.87b

Forecast size of the global virtual fitting room market by 2029

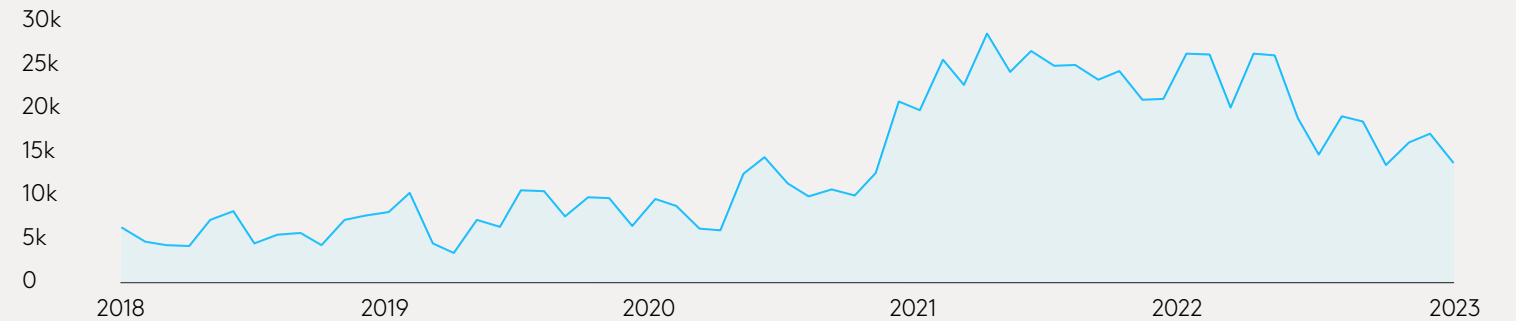
With the emergence of GenAI, the future is moving towards personalised and customised digital-physical ownerships.

TOPICS DRIVING THE TREND



INTEREST IN DIGITAL FASHION

Source: Search data



Consumer need

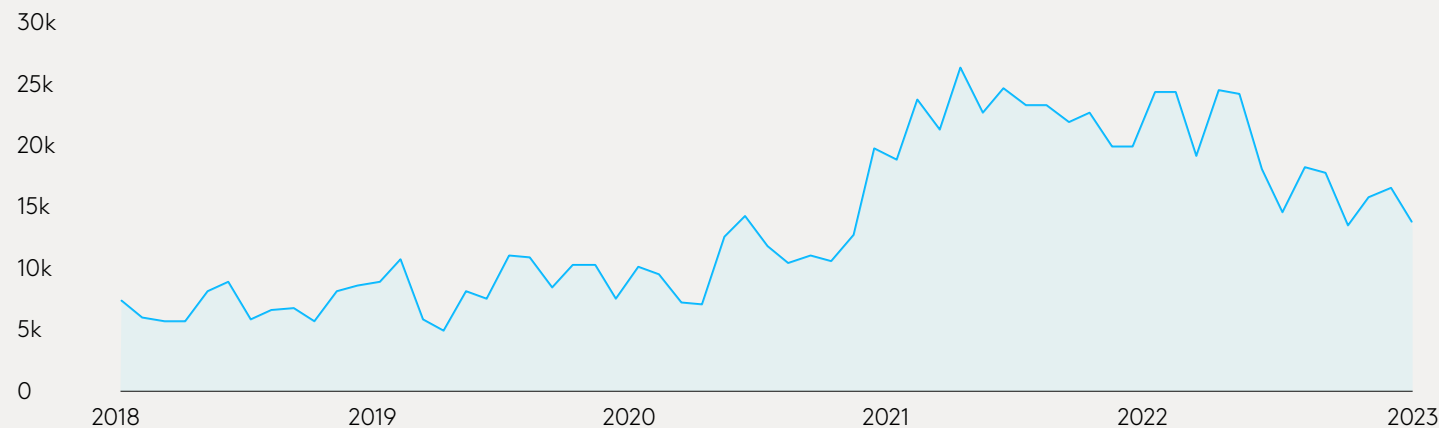
Interest in digital realms of fashion continues to take shape as consumers experiment with virtual garments and accessories increasingly becoming a part of their wardrobe. Beyond these, a silent need emerges for tech and fashion elements that help consumers manage health and climate realities.

Therefore what lies ahead?

Extended realities provide the best opportunity to invite mavericks into the digital spaces where physical assets accompany shoppable digital assets. Online Avatars tackle the e-commerce try-and-buy gap, and functional tech pieces deliver to the core of technology's expectations—solve problems and simplify lives.

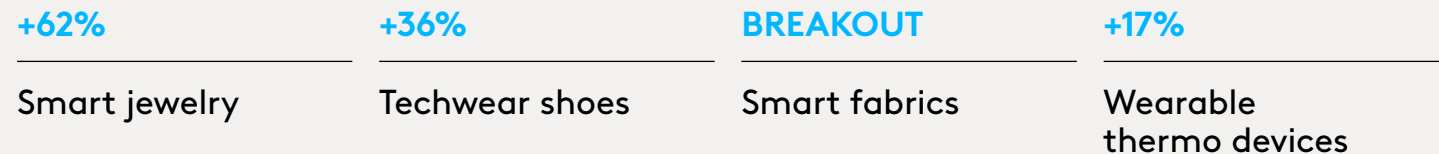
INTEREST IN E-TEXTILES

Source: Search data



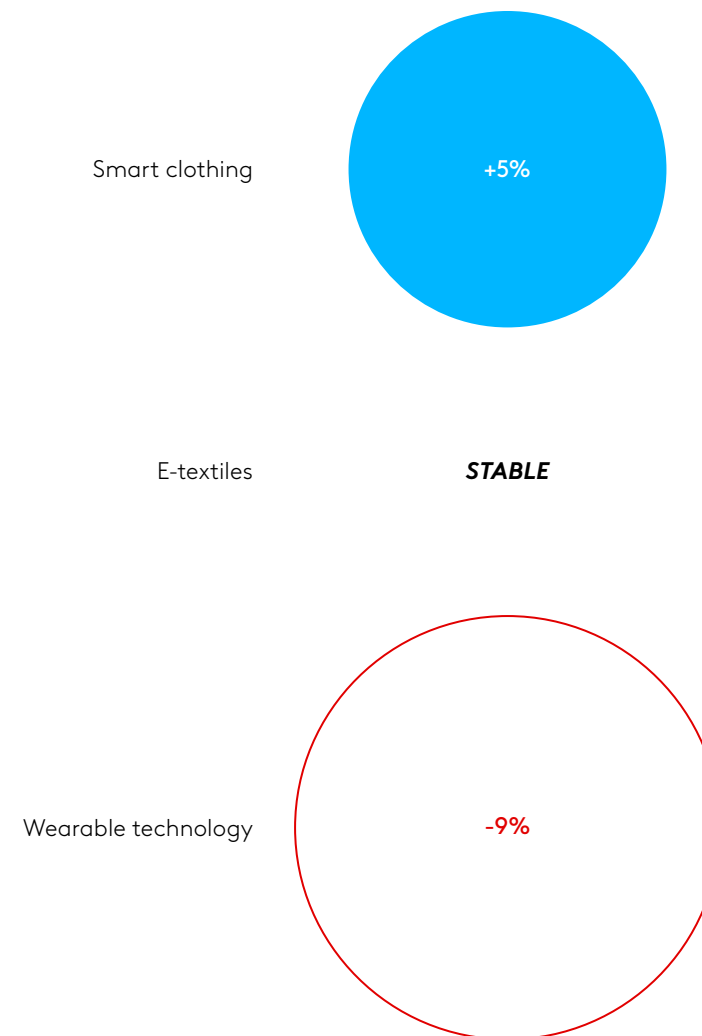
TECH FASHION TOPICS THAT DISRUPT (YoY GROWTH)

Source: Search data



TOPICS THAT DISRUPT RANKED BY GROWTH

Source: Search data



Introducing the digi fashionista

THE CONSUMER BEHIND THE TREND

About

Where tech intersects fashion and consumers lean towards digital smarts across multiple touchpoints to give them what they seek.

Personality

Analytical, active, and passionate.

Demographic

The only segment that skews males spread across various age cohorts.

Interests

Technology and computing are central to their identity. Gaming, anime, and manga are their core hobbies.

Fashion topics

- On-demand-manufacturing
- UA-recover-clothing
- Kinetic-energy-harvesting
- NFTs
- Wearable-art
- Smart-socks
- Interactive-dress

Social networks

27.7x*  Discord

25x  reddit

16.78x  Telegram

10.72x  Medium

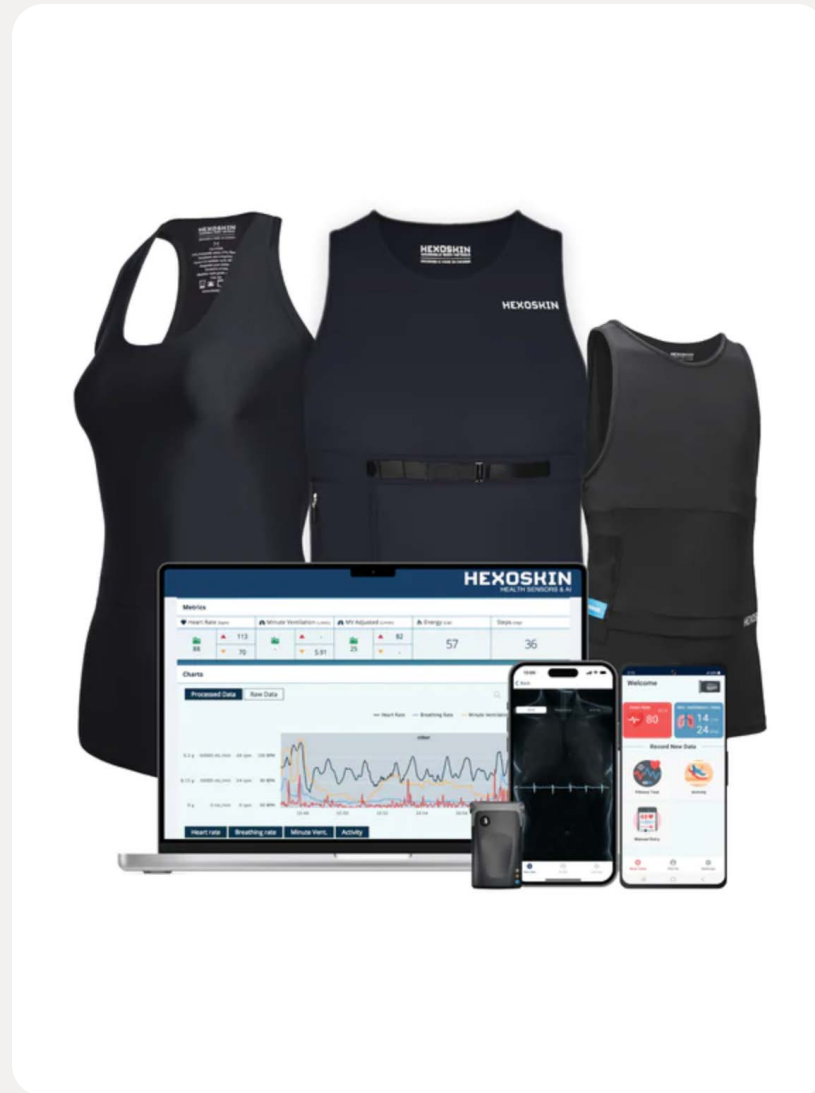
*Interpreted as Discord 27.7 more relevant to this segment compared to the full fashion audience collected for this report.

"I want to see an entire outfit covered in LED Matrix. I wish more companies looked at e-textile options."

Social expressions



How brands are already **innovating** to address this trend



The [Hexoskin](#) Smart Garments include textile sensors embedded into comfortable garments for precise and continuous cardiac, respiratory, and activity monitoring. Hexoskin users can visualise, report, and analyse their data ¹³.



Startups such as [Techniche](#) are creating cooling clothes for a warmer future. They are producing outfits that reflect sunlight and apparel that comes with its thermostat to help people deal with more intense heatwaves ¹⁴.

Concluding thoughts

Digitally dressed for success, **avatars** are the new frontier



Serene Wilson
Global Insight, Dx Analytics
Kantar



The line that separates the physical and digital worlds will continue to blur as more and more people grow comfortable with avatars of artists, influencers, and even representations of themselves.

We want our digital selves to look as great as we do—maybe even better. An extension of ourselves, digital identity is not just about personal expression but for the marginalised and the restricted, a means to break barriers. Curtailed by limitations and stereotypes in real life, the creative and personalisation opportunities in the digital realm provide a suitable space for self-expression. As more time is spent online, digital identities will become increasingly important.

Self-expression doesn't need to come at the cost of the environment. Virtual fashion aligns with the core values of the future consumers, such as inclusivity, sustainability, and democratising the fashion landscape.

With more audiences growing relaxed with digital spending, fashion, and owning designer pieces have become accessible to those outside the real-world consumer groups of high-end fashion. It begs the inquiry of whether digital possessions will ultimately become more valuable than physical possessions, both emotionally and financially.

The metaverse will continue indulging the senses through experiences not available in the physical world. The allure of unique digital assets created through NFTs will endure in line with the demand for digitalisation and personalisation.

"Within one year, we have shown the world one of the strongest and most obvious use cases for the metaverse yet—digital fashion."

Dr. Giovanna Graziosi Casimiro
Head of metaverse fashion week



Creating **genuine bonds** with consumers



Yuthi Meas
Creative Director

Yuthi has led brand and identity work for mass and high-end brands, including Tommy Hilfiger, Vince Camuto, Elie Tahari, Giorgio Armani, Nike, L'Oréal, Amazon Fashion, and celebrity brands, including Jessica Simpson.

Establishing a personal connection with consumers has become crucial due to the surge of new digital brands and plethora of options.

Successful branding now requires depth, a distinct perspective driven by passion, and a defined set of values. In simpler terms, brands must possess a personality. Meanwhile, consumers are keen to forge a sense of belonging by immersing themselves fully in the world of their favourite brands.

Leveraging celebrity endorsements has traditionally been the go-to approach for well-established brands. However, this strategy now demands a deeper level of engagement beyond merely replacing a fashion model in a print campaign. Instead, it necessitates a genuine collaboration. Conversely, entrusting a founder or creative director to communicate their voice and style or tapping into stylistic themes such as nostalgia, luxury, or social currents can be effective for emerging or smaller brands. Similar to interpersonal relationships, people are naturally drawn to brands that present with authenticity and sincerity, coupled with a clear, committed vision.



Inclusive, diverse, and beyond



Cynthia Vega
Global Lead, Dx Analytics
Kantar

"Fashion is the armour to survive
the reality of everyday life"

Bill Cunningham
American photographer

Universal yet deeply personal. A language to communicate, express, differentiate. An identity. An escape. A raison d'être. A mere necessity. Nuanced, distinct, unique, versatile, fluid. A space where there is place for everyone to co-exist whilst embracing individuality.

The debate continues...the discourse, while the industry norms break away from the traditional...narrative. Representation in the future is no longer just about size inclusivity, impairment, LGBTQ+, gender, racial, and ethnic diversity. It's also about the people behind—designers, makeup artists, manufacturers, photographers, casting directors.

Furthermore, the rhetoric of climate justice can not be separated from accurate representation—including workers producing garments and communities facing the brunt of climate change. True inclusivity and representation in fashion involve deliberate consideration linked to ethical sourcing, mindful consumption of resources, minimal waste, and eco-friendly materials. All the while catering to the needs of a consumer who wants to be empowered to feel good about themselves

True inclusivity and representation in fashion involve deliberate consideration linked to ethical sourcing, mindful consumption of resources, minimal waste, and eco-friendly materials. All the while catering to the needs of a consumer who wants to be empowered to feel good about themselves.



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Cynthia Vega

Author
Serene Wilson

Design
Stephen Shecora

For further information please contact us:

Sources

Trend 1

¹Igini, Martina. "10 Stunning Fast Fashion Waste Statistics." Earth.org, 21 Aug. 2023, earth.org/statistics-about-fast-fashion-waste/. Accessed 2 Nov. 2023.

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