



# The future of fashion

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# 01. Introduction

Clothes are a key part of our society and culture, as it not only provides us with protection and comfort, but is also a form of expression and communication. The clothes we choose may reflect our personality, our values, our social status and even our profession. Fashion and trends change constantly, however the importance of clothes as an instrument to express our identity and communicate something about ourselves has endured throughout history. Furthermore, the fashion industry is one of the world's largest and most powerful: it has a market value of about 2.5 trillion dollars and is estimated to contribute 2% of the global gross domestic market (GDP) (Fashion United, 2021).

However, fashion is one of the most contaminating sectors on the planet according to Greenpeace (2021), particularly fast fashion. In addition, according to the World Wide Fund for Nature (WWF), this type of fashion is responsible for around 20% of waste water and 10% of carbon emissions worldwide (2020).

In view of the above, the purpose of this study is to examine the opinion of the inhabitants of the Basque Country as regards fashion and the textile industry: Will we wear clothes bearing in mind the environment? Will we change our consumer habits as regards clothing? Are we seeking a fashion with a more innovative approach looking forward? Will the fashion industry advance towards more sustainable practices?

This study focusses on responding to these and other issues, examining the perception of the Basque society as regards the transformations expected in fashion in the future, as well as its level of knowledge and points of view in respect thereof.







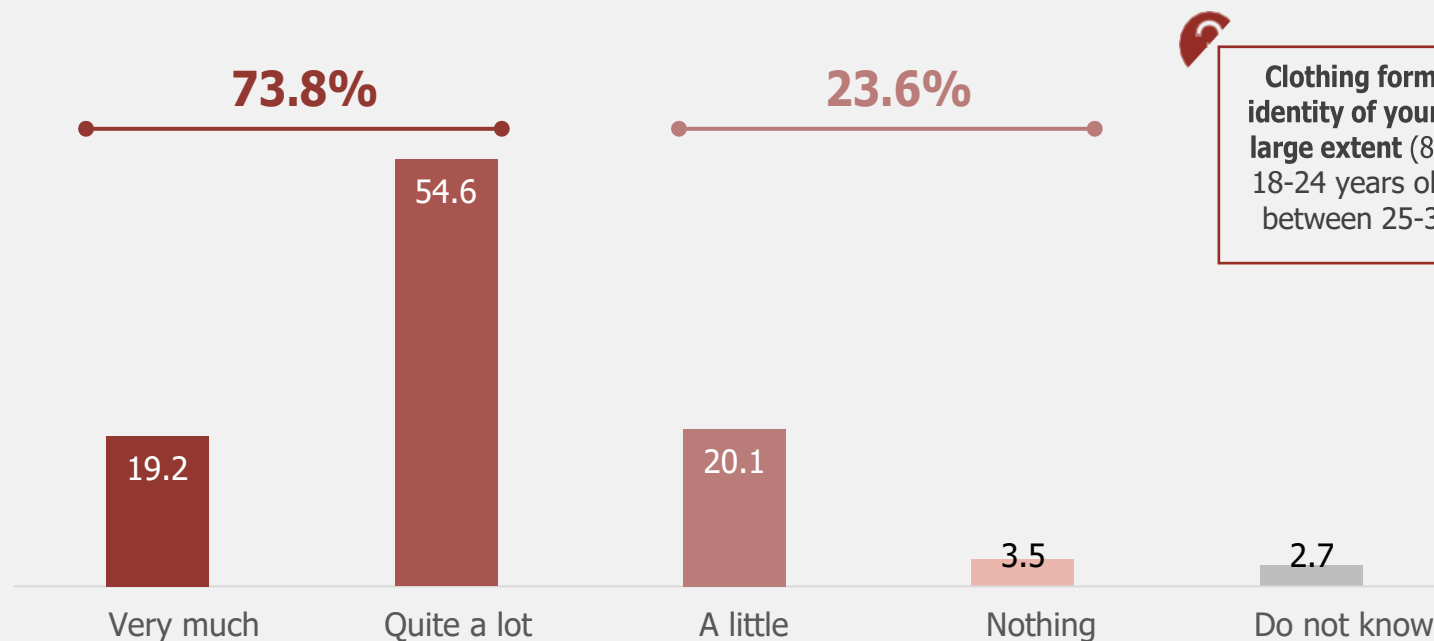
## 02. Identity and fashion

## Is clothing an ingredient of our identity?

*Today, how much do you believe clothing says about who we are?*



### % of the total population



Clothing forms part of the identity of young people to a large extent (80.7% between 18-24 years old and 83.2% between 25-34 years old).

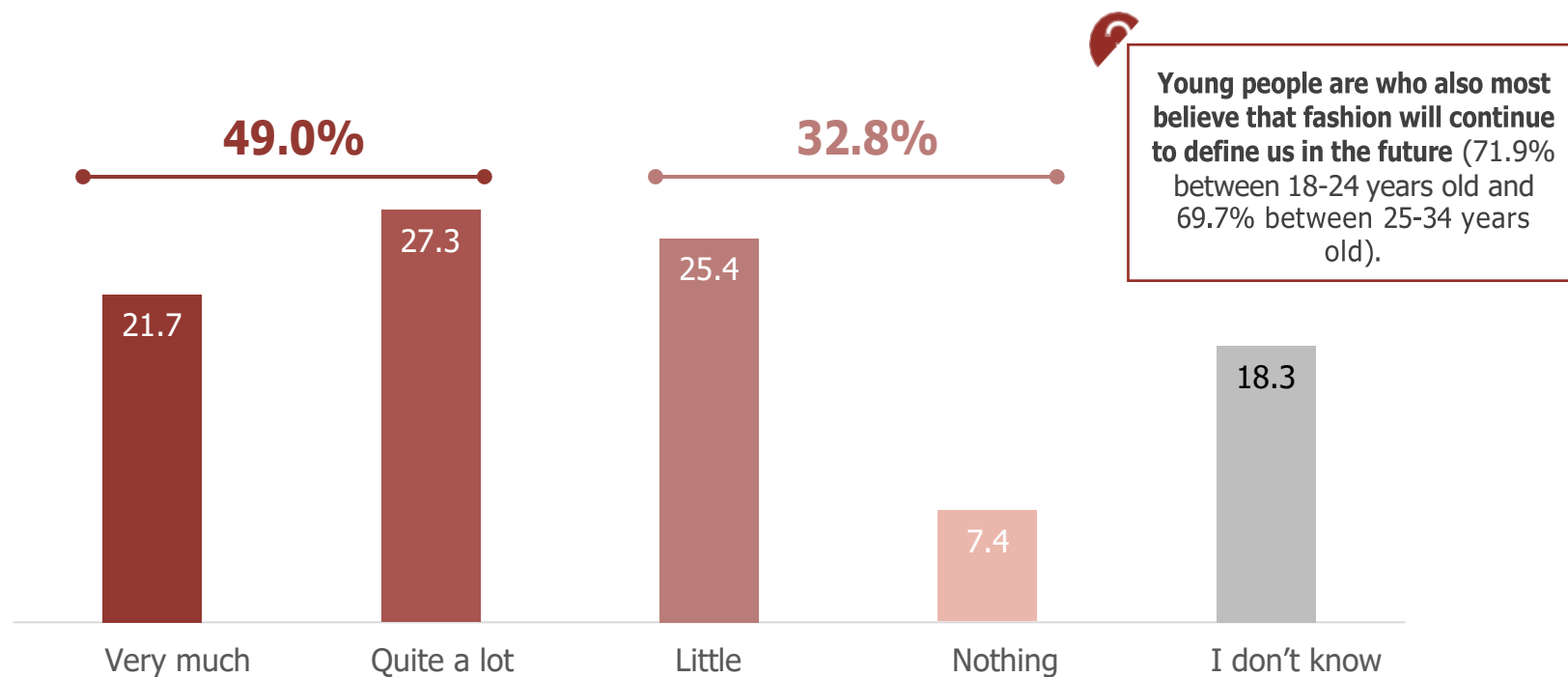
**Clothing is a key element of our identity:** such is considered by 73.8% of society...

## Will clothing be an ingredient of our identity?

And, in 2050, how much do you believe it will tell us about who we are?



% of the total population



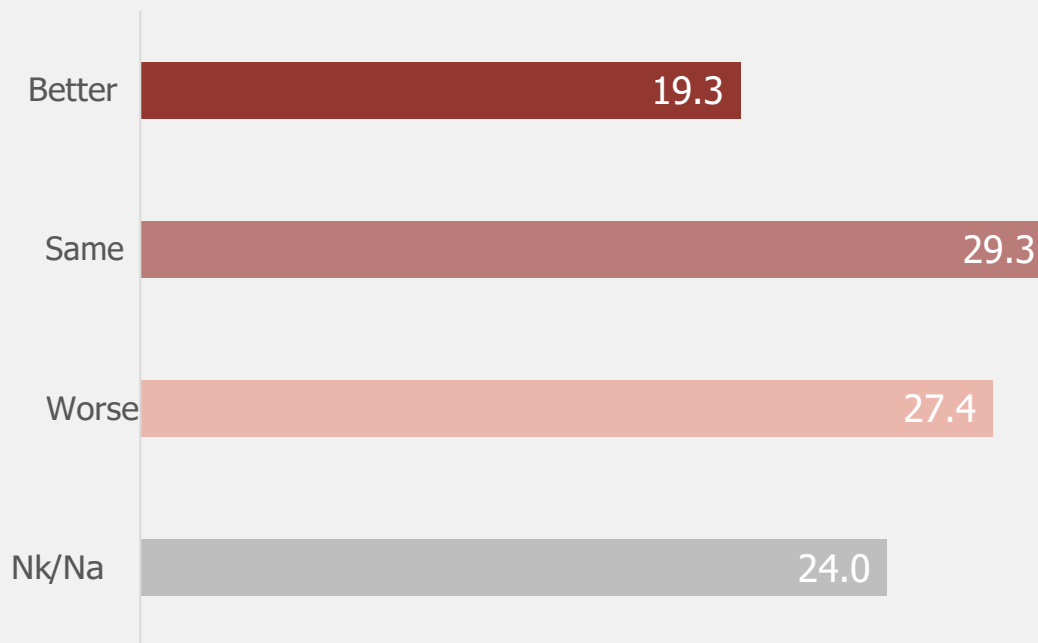
... although only half believe that clothing will continue to be relevant in the future.

## How will our way of dressing evolve?

*Do you think we will dress worse, the same or better in 2050?*



% of the total population



**Young people, more optimistic about how we will dress:** 44.3% between 18-24 years old and 33.9% between 25-34 believe we will do it better.

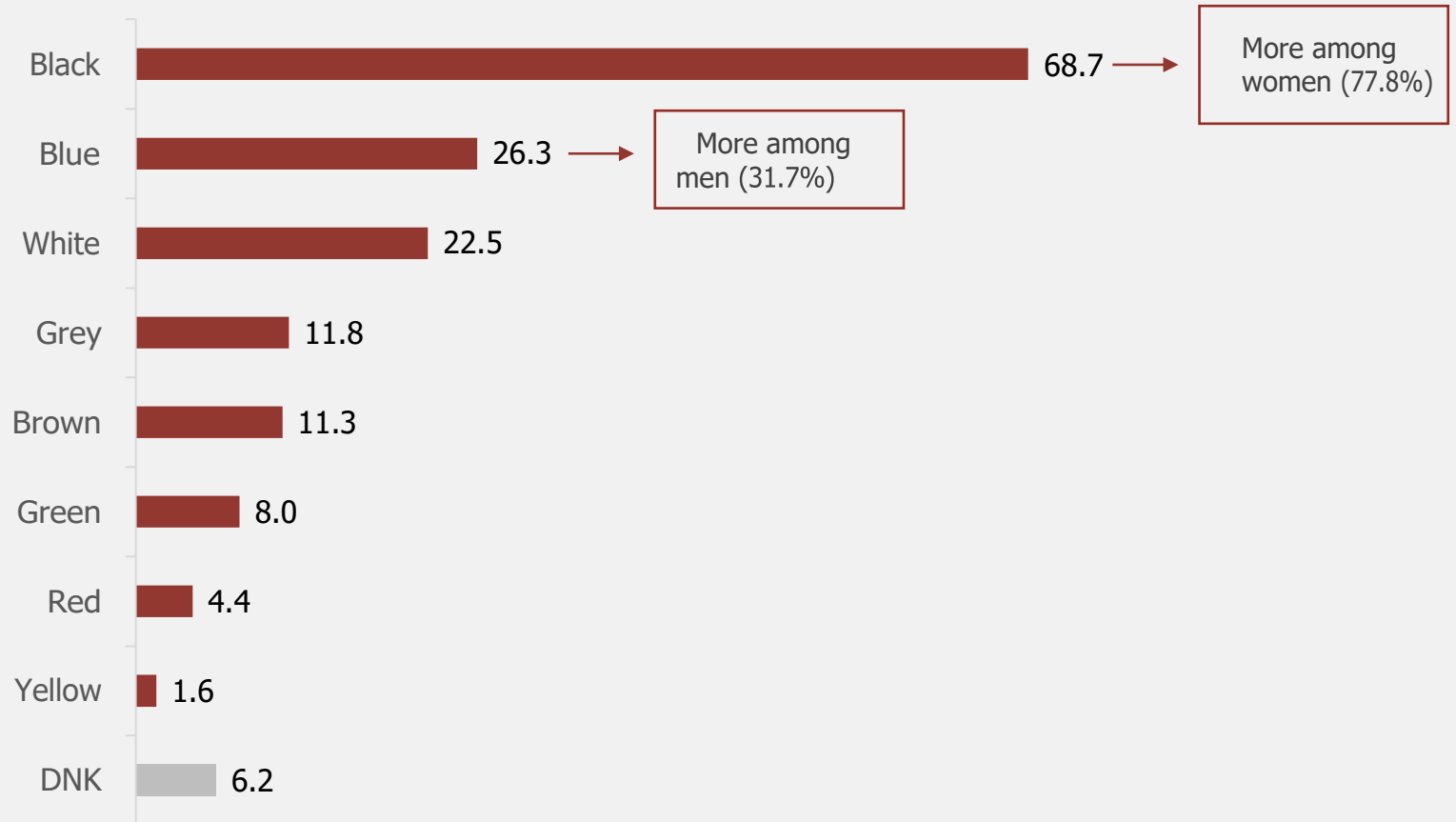
**Almost 1 out of 3 considers we will dress worse than now in 2050**, whereas 19.3% believe we will dress better.

## What is the most commonly worn colour?

*What colour do you think predominates the fashion you see in the streets?  
Choose a maximum of two answers.*



### % of the total population

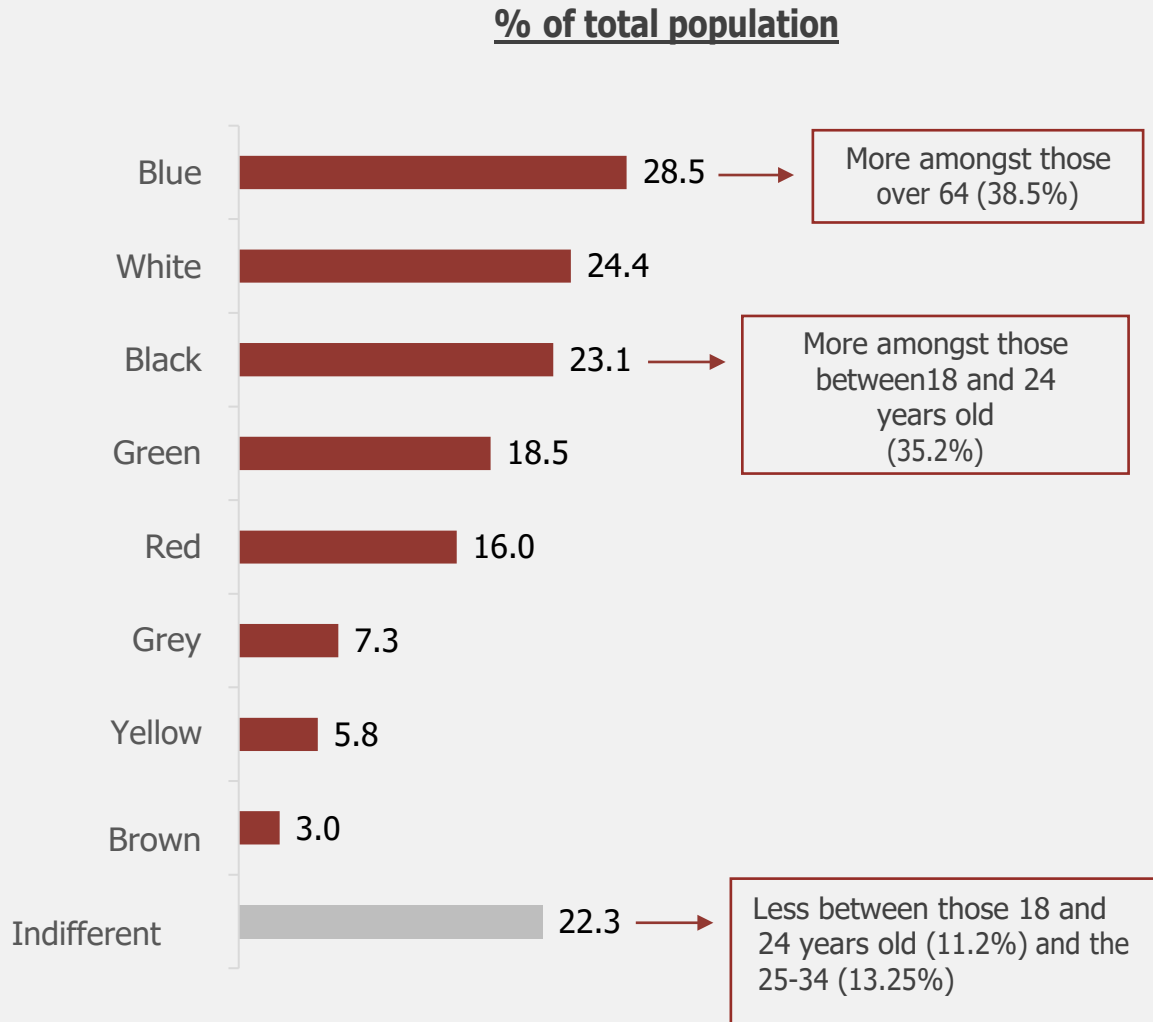
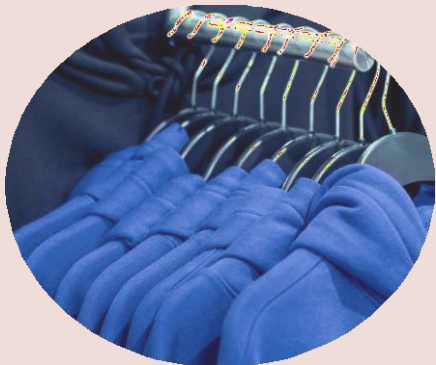


**The predominant colour in our society is black according to a large majority, followed by blue and white.**



## What will be the most commonly worn colour?

*And what colour would you like to predominate the fashion of the future? Choose a maximum of two answers.*



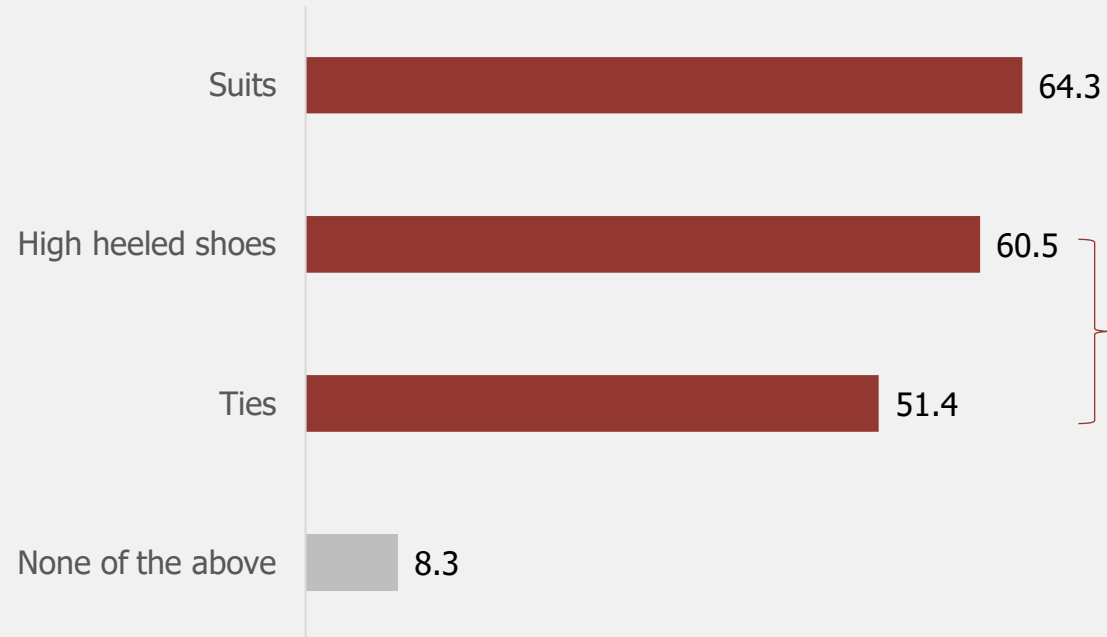
Although **more than 1 out of every 5** are indifferent, **3 out of every 10** would like the **most commonly worn colour in the future to be blue**, followed by white and black.

## Will suits, ties and high heels continue to exist?

*Do you think they will continue to exist in 2050...? Check all those you consider.*



### % of the total population



**Those over the age of 64 are more pessimistic about the continuity of these elements in the future.**

**Suits, ties and high-heeled shoes will continue to exist in 2050:** this is believed by more than half of the population of the Basque Country.

## Gender and fashion

*Of the following changes in fashion in the future, which would you like to occur?  
Check all those you consider.*

### % of the total population

*Men's and women's wear sections would disappear, that is to say,  
a gender free fashion.*



19.0%



Young people are much more in favour of a unisex fashion (46.9% between 18-24 years old and 28.0% between 25-34 years old).



**Only a minority** is in favour of the **men's and women's wear sections disappearing** in the future.



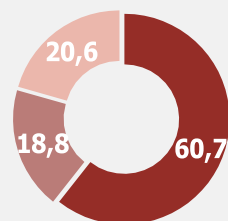
## Real wardrobe vs ideal wardrobe

Indicate the clothes and footwear you currently have in your wardrobe and how many you would like to have.

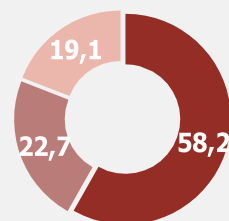


### % of the total population

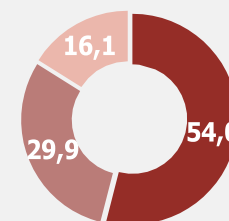
Coats...



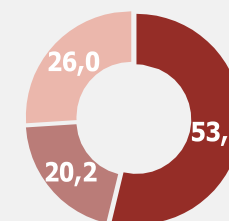
Shirts...



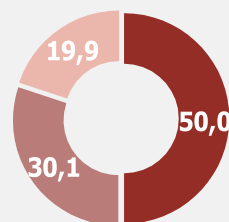
T-shirts...



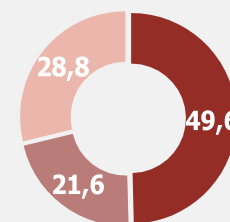
Skirts\*...



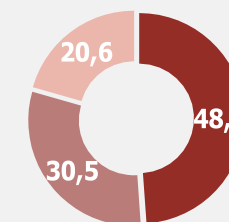
Trousers...



Dresses\*...



Footwear...



■ Have the SAME No. of garments they would like to have.

■ Have MORE garments than they would like to have.

■ Have LESS garments than they would like to have.

In general, citizens consider they **agree with the number of garments they own**. However, around **30% have more shoes, trousers and t-shirts** than they would like to have.

\*% of those who say they use/would use

A yellow cable-knit sweater is laid flat on a light grey surface. A small globe of the Earth is placed in the center of the sweater. Several blank, light brown paper price tags are attached to the sweater with white string. A single tag is also attached to the top of the sweater. The entire scene is framed by a black border.

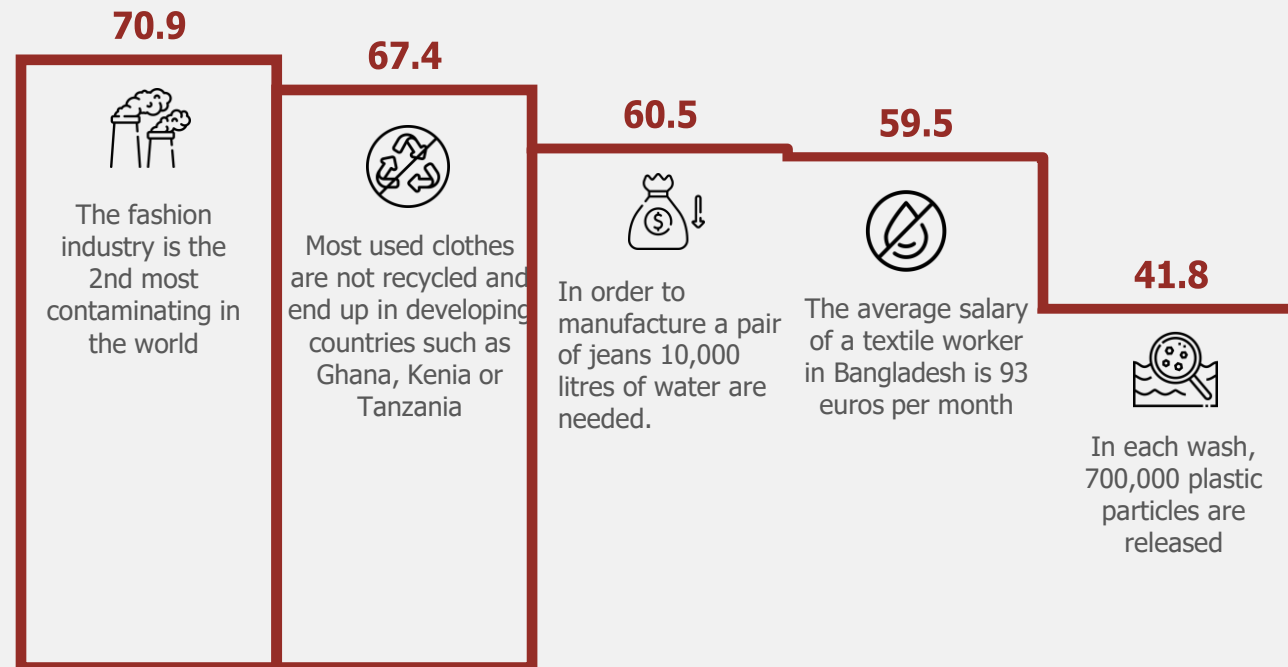
## 03. Climate change and fashion

## What do we know about the problems associated to the fashion industry?

*Have you heard or read any of the following statements related to the fashion industry before?*



% of yes of the total population



**Most of the environmental problems associated to the fashion industry are known among citizens. However, only 41.8% have heard or read that thousands of microplastic particles are released in every wash.**



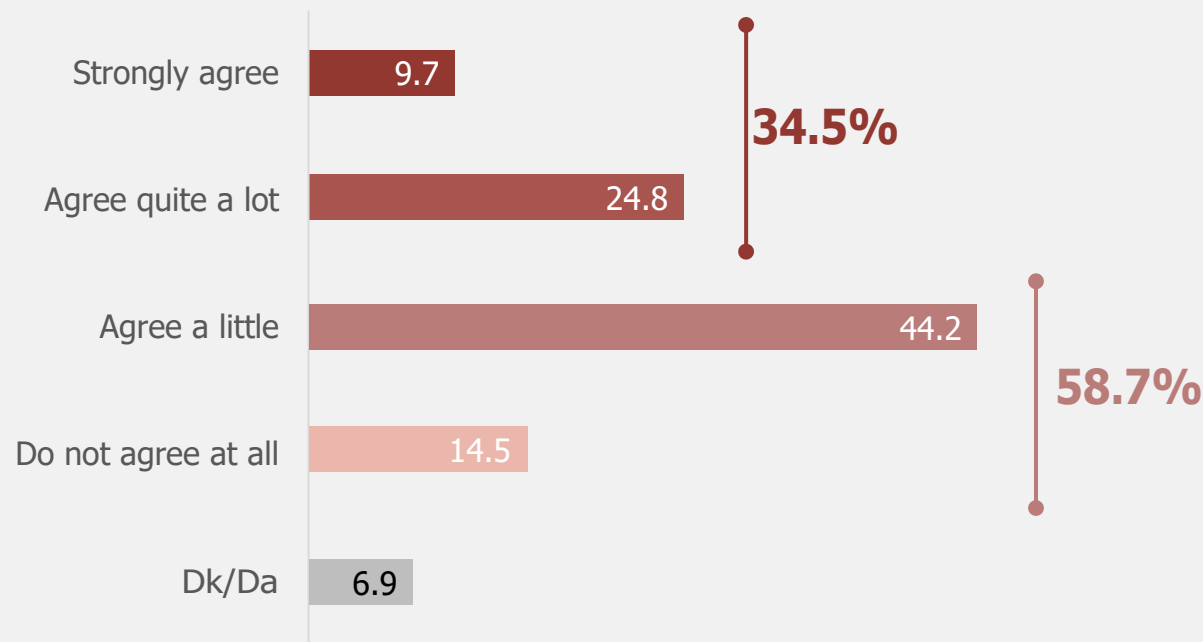
## Level of information about how to access sustainable fashion.

Indicate your degree of agreement with the following statements related to some of the challenges presented by the future of fashion.



% of the total population

*I have adequate information to choose the clothes that best respect caring for the environment*



Even so, only **1 out of every 3** consider they have adequate information to choose the clothes that best respect and care for the environment.

## What behavioural changes would help mitigate the climate crisis?

*Of the following actions, which do you believe help mitigate the climate crisis?*

*Check all those necessary.*



### % of the total population



**Women, more in favour of second-hand clothes (56.0%), of selling those they don't wear (52.4%) and of renting them out (13%). The over 64 age group, are more in favour of only buying the clothes they need (76.4%), but less to rent them out (4.0%) and buying second-hand (32.7%)**

**Reduce the consumption of clothes buying only those needed is the key measure to mitigate the climate crisis.** In addition, more than half understand that buying clothes with sustainable materials, placing them in clothing bins, and taking care and repairing them, would also have a positive impact.

A person with curly hair is wearing a white VR headset and a shiny, metallic-looking jacket. They are looking down and adjusting the headset. The background is a gradient of blue and purple. A black rectangular box is overlaid on the image, containing white text.

## **04. How will we dress in the future?**

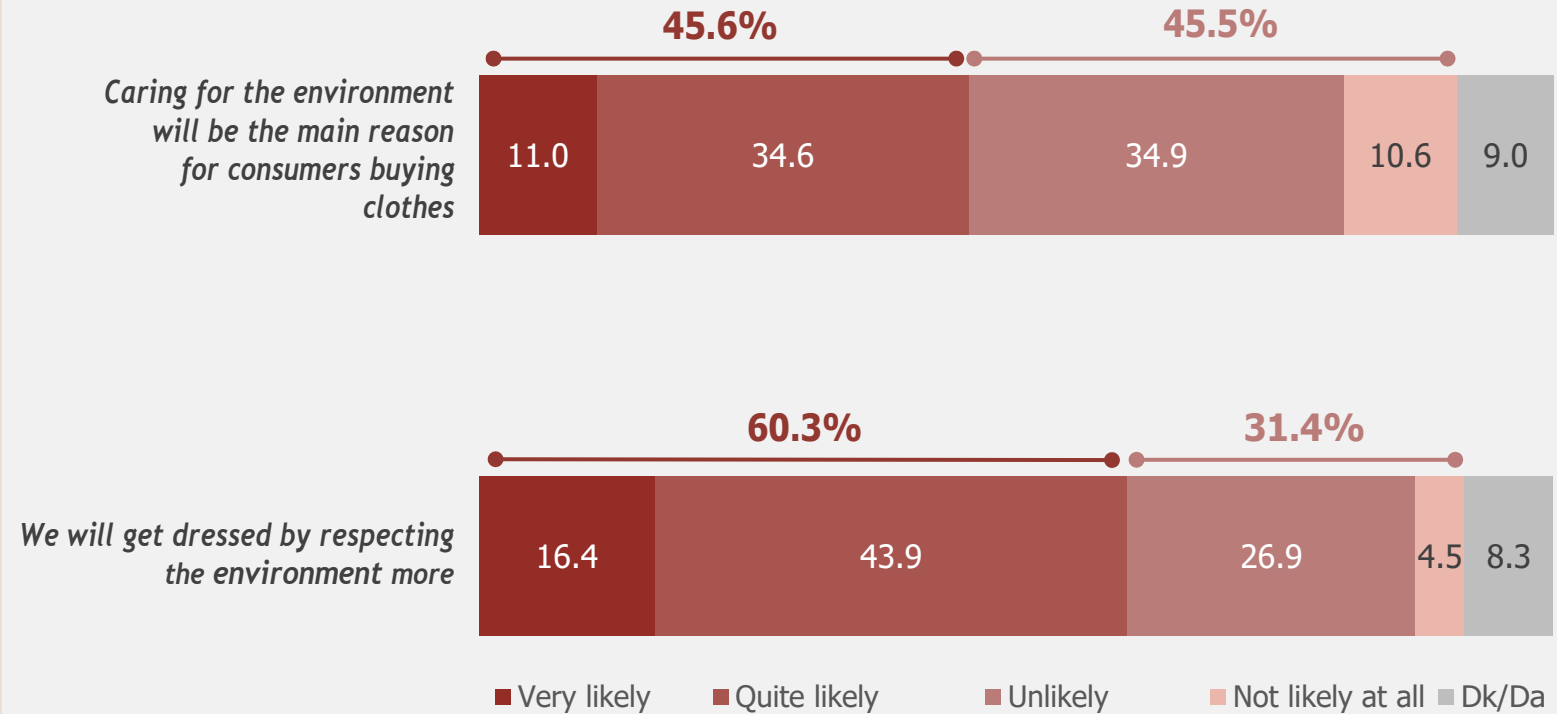


## Will we buy clothes and get dressed respecting the environment?

Thinking about 2050, do you believe it is likely the following events will occur?



### % of the total population



**There is no unanimous consensus as regards the environment being the main purchasing driver in the future:** 45.6% thinks so, whereas a similar percentage think the opposite.

However, **6 out of every 10 do believe they will dress by respecting the environment more.**

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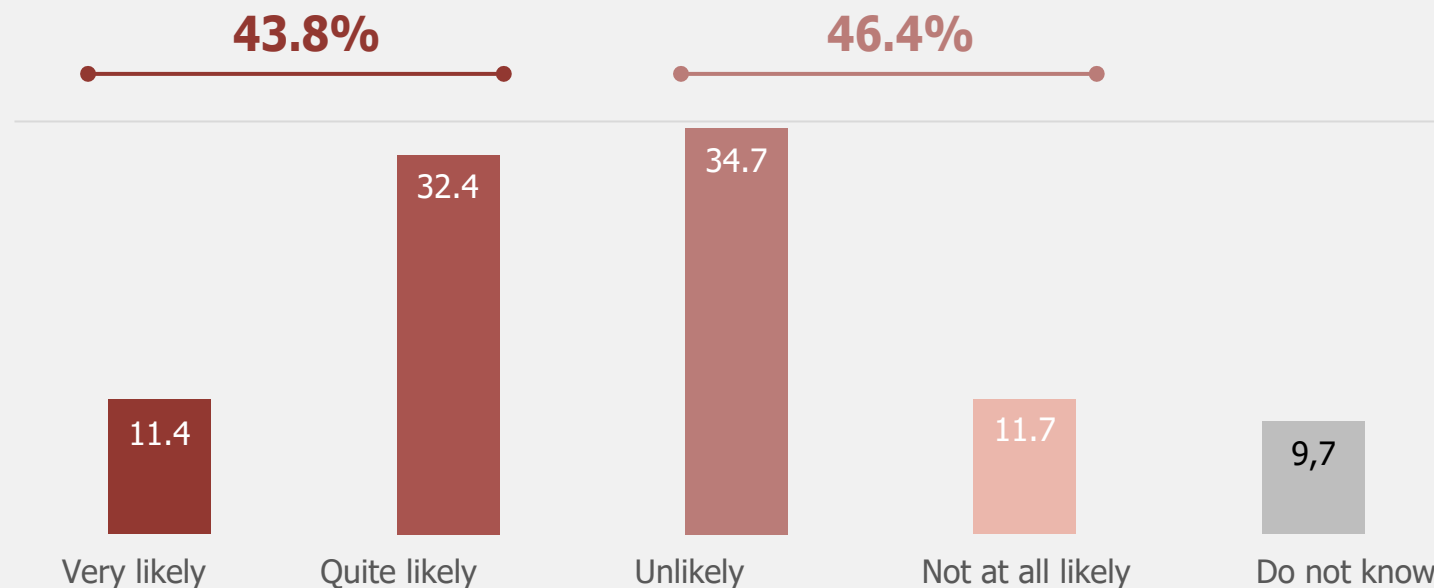
## Will sustainable clothing be accessible to the most vulnerable?

Thinking about 2050, Do you think it likely the following events will occur?



% of the total population

*Environmentally friendly clothing will be more accessible to citizens with less economic resources*



**Neither** does society **unanimously** consider the most vulnerable people will have greater access to sustainable clothing.

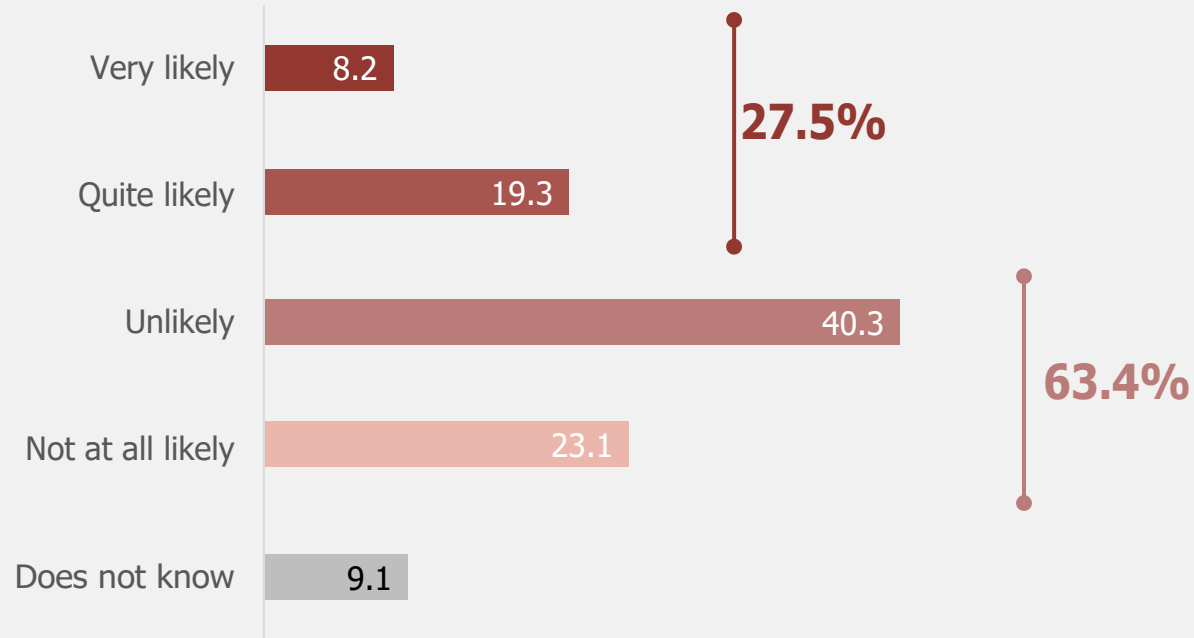
## Will we dress only out of necessity?

Thinking about 2050, do you think it likely the following events will occur?



% of the total population

*We shall dress only out of necessity and not for pleasure*



Only a **minority** believe it likely that people will **dress only out of necessity**.



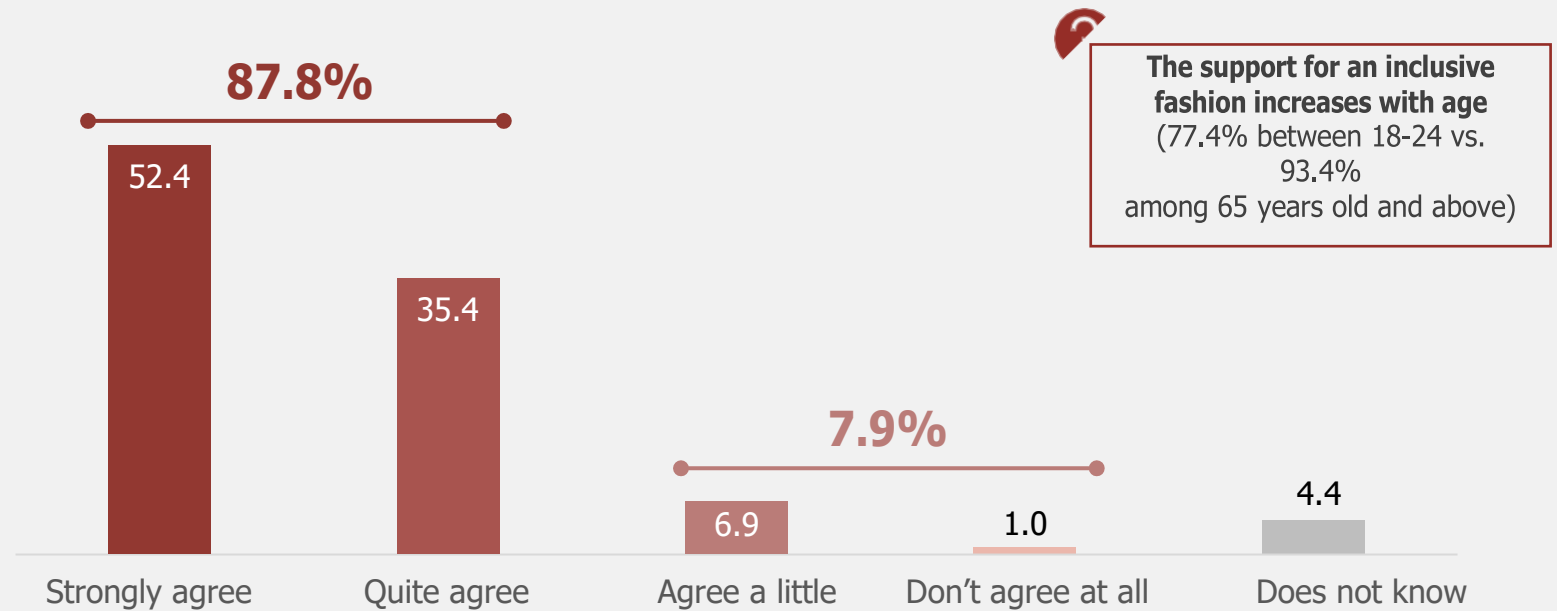
## Do we want a more inclusive fashion?

Indicate your degree of agreement with the following statements related to the challenges presented by the future of fashion.



### % of the total population

*Brands should endeavour to offer their clothes in all the sizes that there are in society*



For citizens **it is important for brands to endeavour to offer all the sizes there are in society.**

## Do we want a futuristic fashion?

*Of the following changes in the fashion of the future, which would you like to occur?  
Check all those you consider.*



### % of the total population



**Young 18-24 people are more in favour of a futuristic fashion:** they would buy it on Metaverse (19.9%), sprays for instant dresses (25.2%) and, they would have 3D printers to print clothes (34.4%) to a larger extent.

**Although more than half would like clothes to be biodegradable in the future, Basque society does not seem very in favour of a futuristic fashion:** less than 10% would like to go shopping in a virtual world, that clothes be made from living fabrics or created with sprays.

## What do we want there to be in the clothing stores of the future?

*Thinking about the clothing store of the future, what characteristics would you like to find in it? Check all those necessary.*



### % of the total population



**Among women**, there is more support for **image consultants** (29.3%) and **clothes renting areas** (19.6%).  
**Young people 18-24** are more in favour of **digital formats**: buying exclusively online (17.8%) and wardrobes using applications (46.2%).

**The areas to leave, exchange or sell unused clothes are the main requirement of the stores of the future.** In addition, it is requested **that clothes that are not environmentally friendly be easy to identify, they should have a repair service and for there to be no plastic.**

## 05. Habits and trends to a sustainable fashion



MADE BY  
100% RECYCLING  
MATERIALS

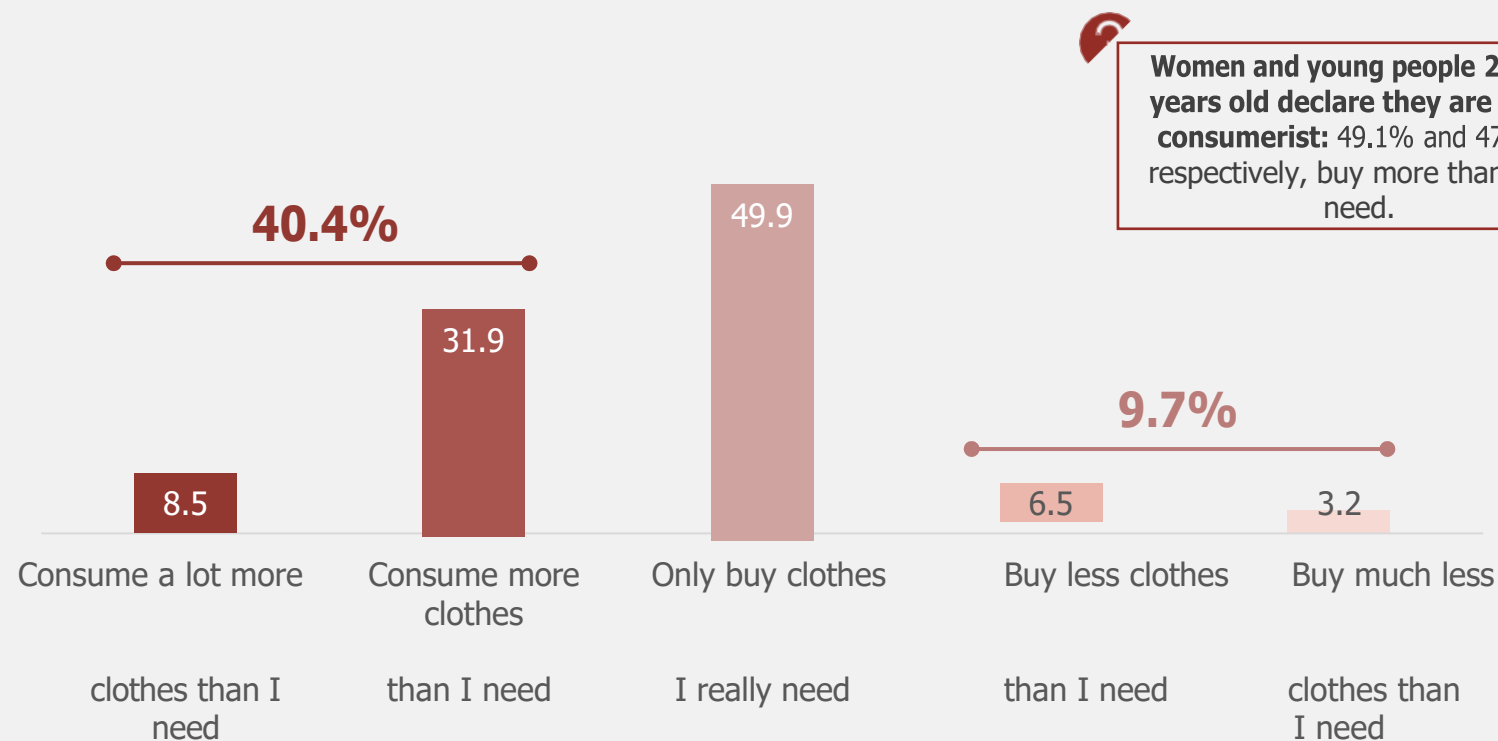


## Do we consume more clothes than we need?

*Thinking about the clothes you buy, would you say that...?*



% of the total population



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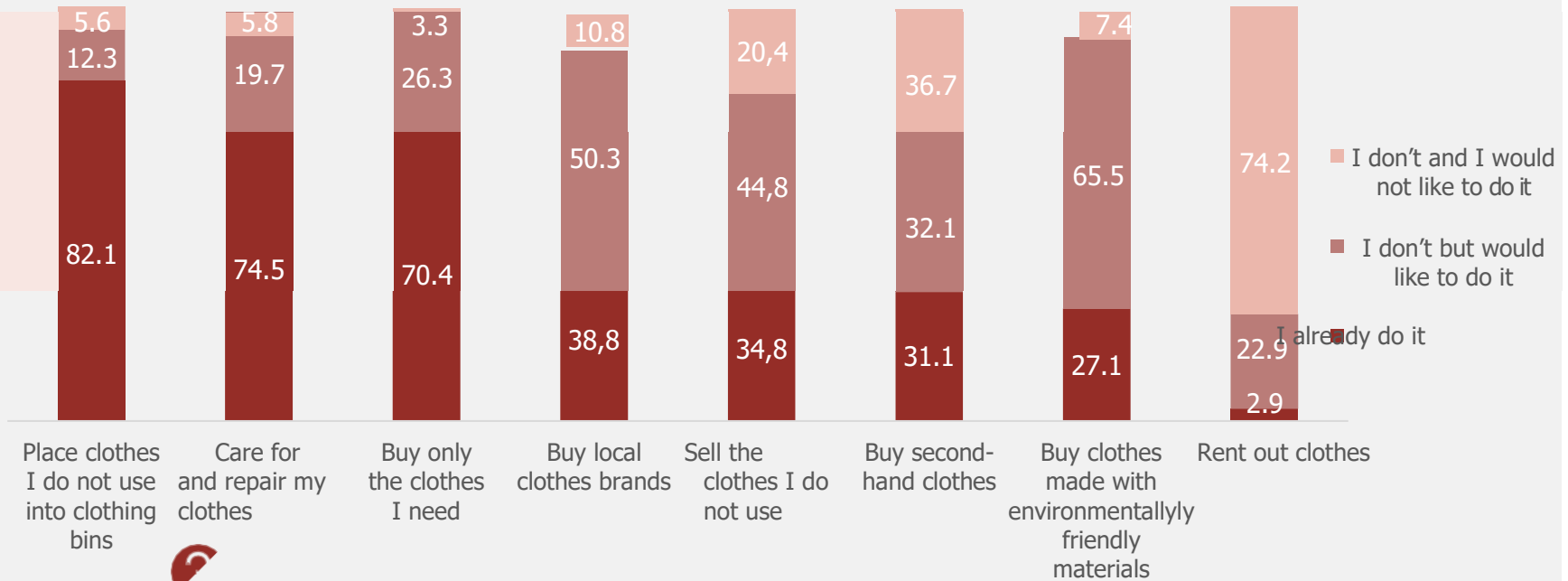
**Half of the citizens consider they buy clothes "rationally": 49.9% only buy the clothes they need, although 40.4% consume in excess.**

## Habits and intention of changing to more sustainable actions

Thinking about clothing, would you say...?



### % of the total population



**Women and young people between 18-24 and 25-34 years old** are more likely to buy **second-hand** clothes (40.8%, 47.4% and 45.6%) and to **sell clothes they don't use** (44.9%, 50.8% and 55.5%). Conversely, **men** are more prone to **only buy the clothes they need** (81.0%).

The most common habit is to place unused clothes in clothing bins, followed by taking care of and repairing clothes and buying only the clothes one needs. Conversely, only 3% rent out clothes and a large majority are neither prepared to do so.

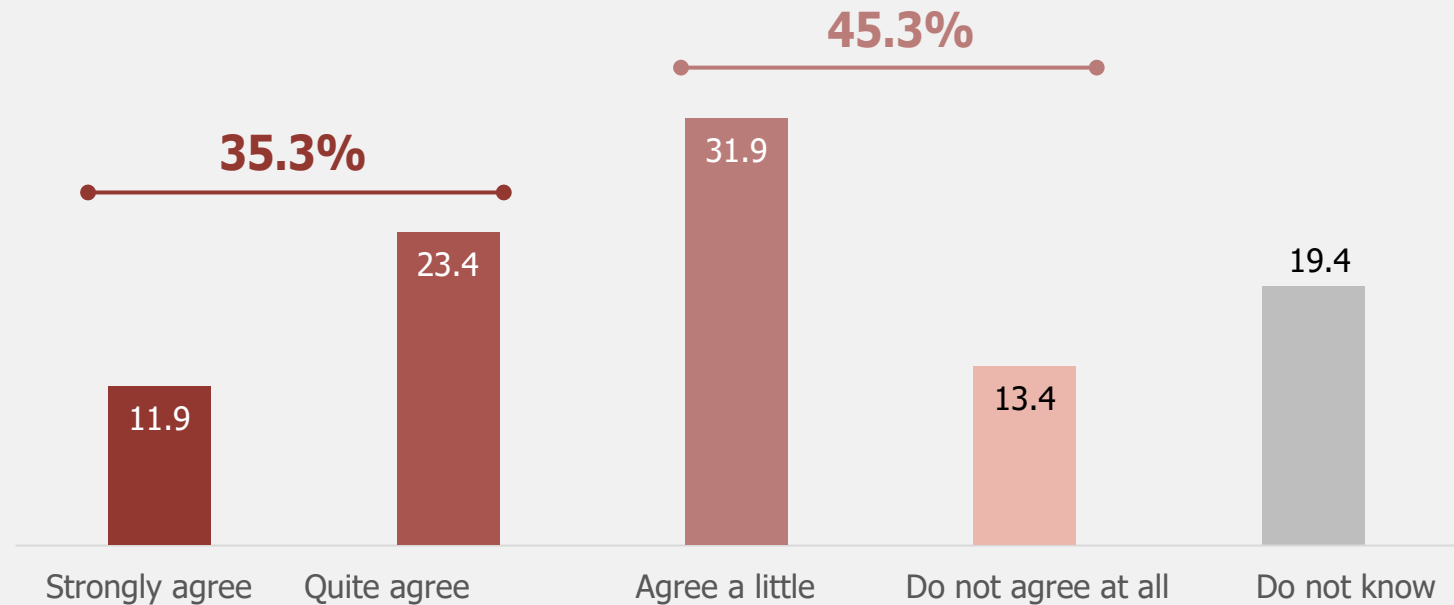
## Will clothes be thrown away in the future?

Indicate your degree of agreement with the following statements related to some of the challenges presented to the future of fashion.



% of the total population

*In 2050 no one will throw clothes into the garbage*



**According to 45.3% of the population in 2050 people will continue to throw clothes into the garbage.**

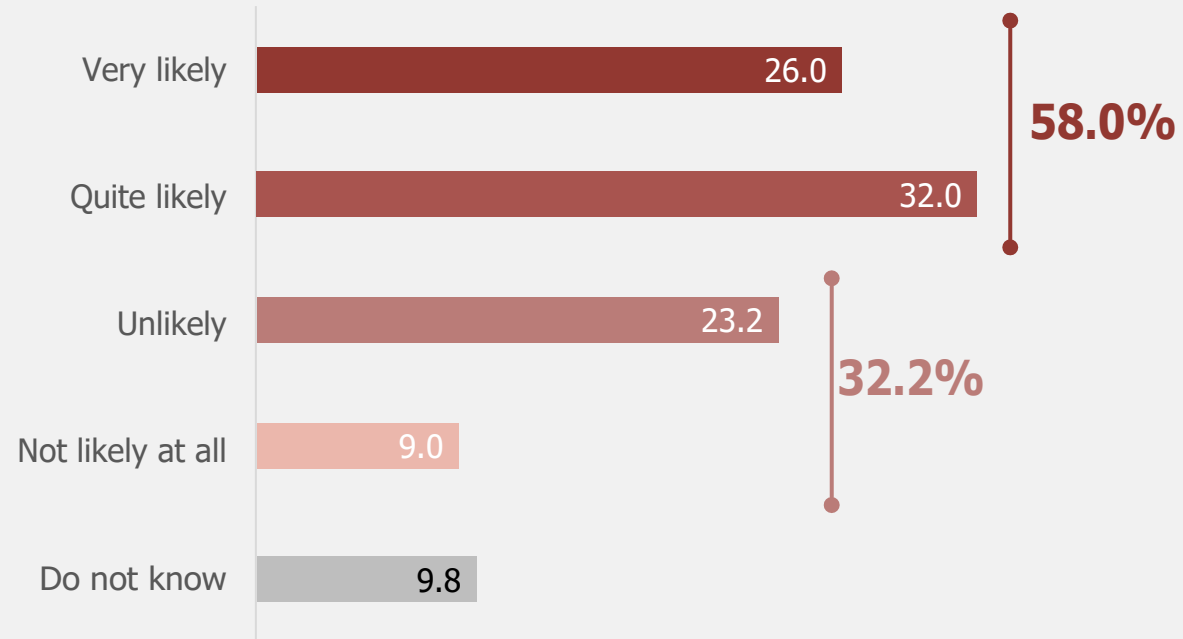
## Will we sew in the future?

Thinking about 2050, do you think the following events will occur?



% of the total population

*No one will sew at home*



**Sewing at home is a habit which will disappear according to 58% of the citizens.**

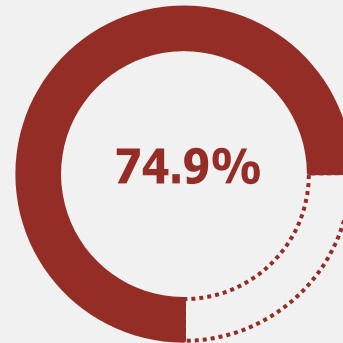


## Will sales still exist?

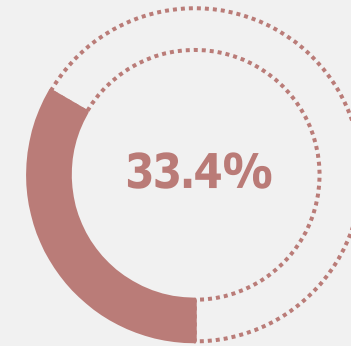
*Do you think they will continue to exist in 2050...?  
Check all those necessary*



% of the total population



Sales



New t-shirts for 1 Euro

**Adults between 35-44** believe so to a large extent (42.2%)

**Sales will endure in the future according to a large majority**, whereas a similar percentage believe that **t-shirts for 1 euro will not**.

A photograph of a textile factory. In the foreground, several large spools of thread in yellow, red, and white are visible. In the background, a complex spinning machine with many bobbins and threads is in operation. The machine has blue and orange components. The scene is brightly lit, and the overall atmosphere is industrial.

## 06. Industry and fashion

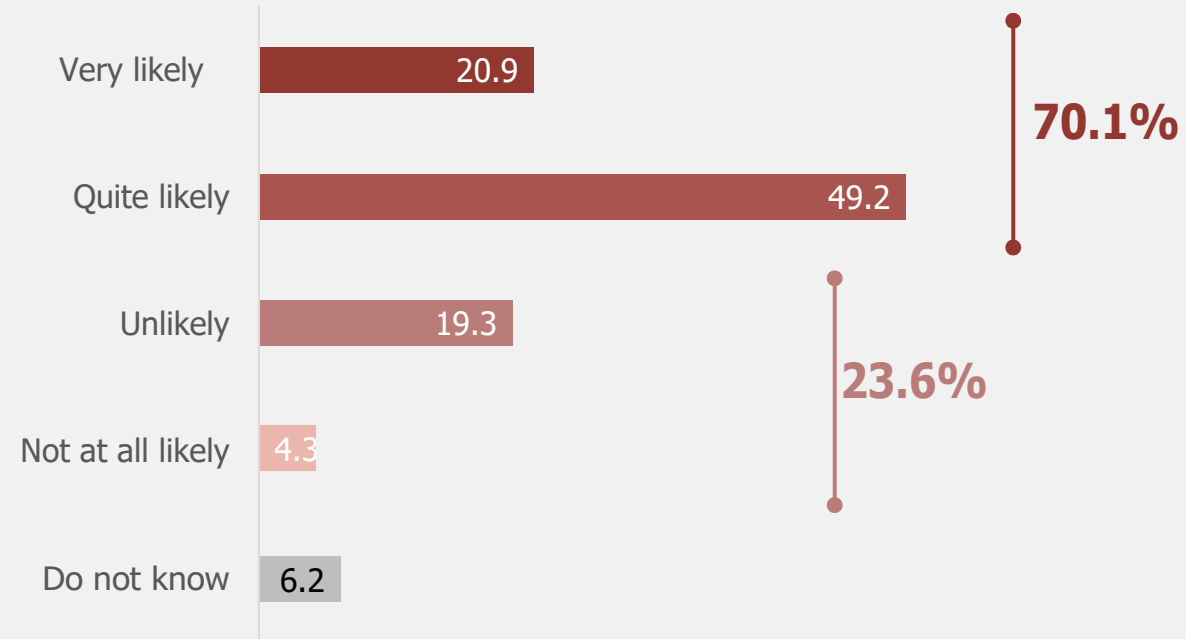
## Will there be a shift in the fashion industry towards sustainability?

*Thinking about 2050, do you think the following events are likely to occur?*



% of the total population

*The fashion industry will innovate to offer more environmentally friendly products*



**The majority trust that in 2050 the fashion industry will offer more environmentally friendly products.**

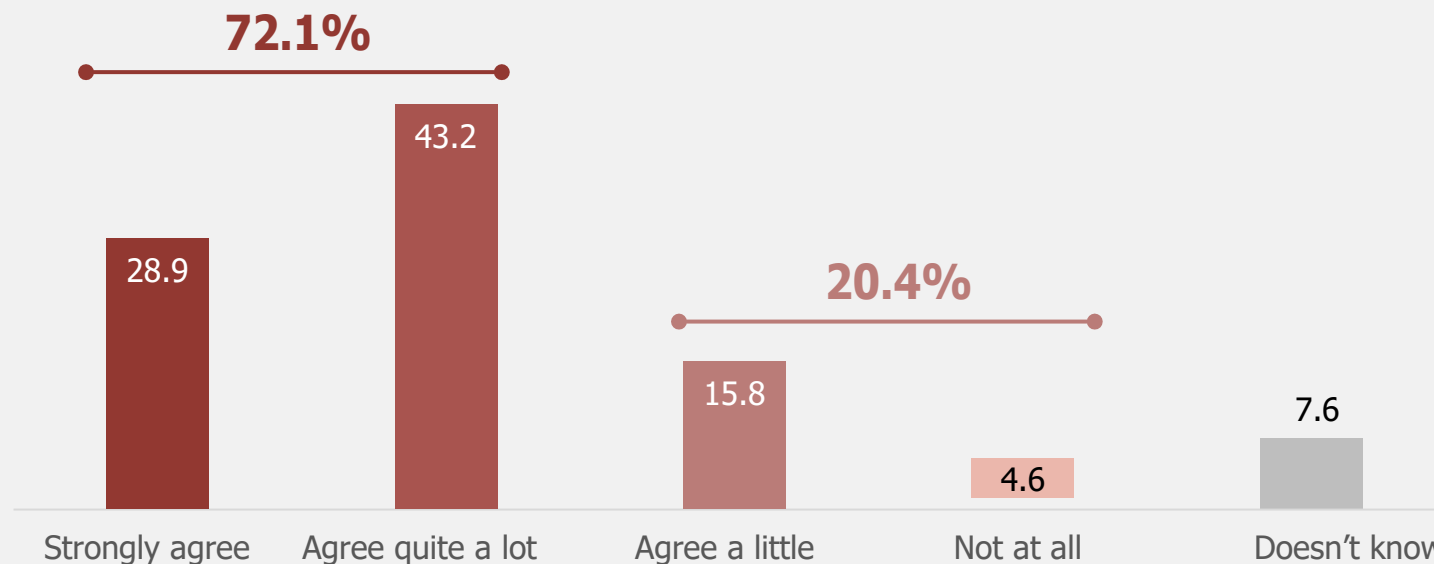
## Should brands reduce their annual number of collections?

Indicate your degree of agreement with the following statements related to some of the challenges presented to the future of fashion.



% of the total population

*It is a problem that fashion brands launching so many collections every year*



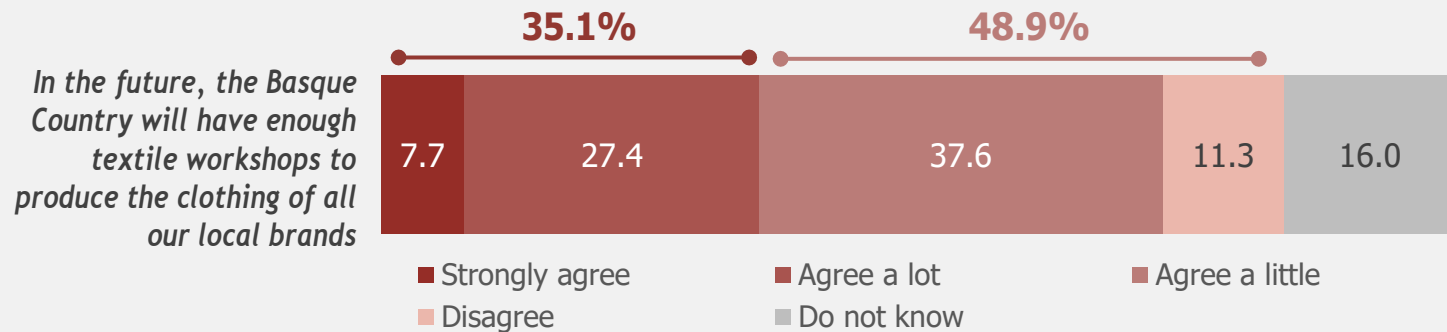
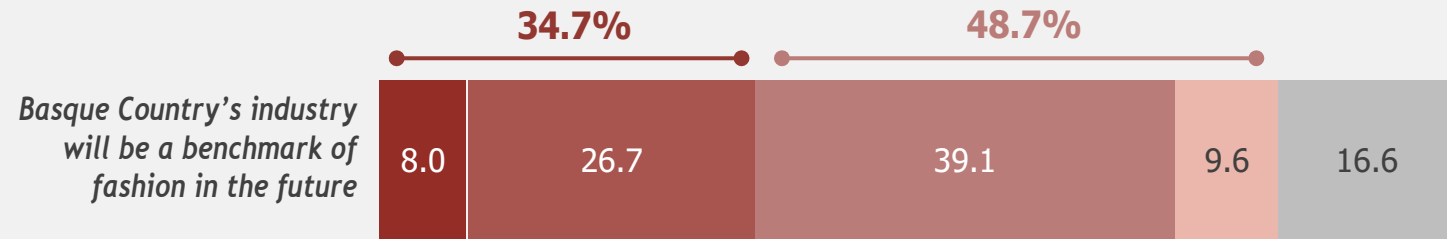
**More than 70% have a negative perception of brands launching so many collections every year.**

## The future of the Basque Country's fashion industry

Indicate your degree of agreement with the following statements related to the future of fashion.



### % of the total population



**Women, are more optimistic:** 40.9% think that the Basque fashion industry will be a benchmark. Also, **young people between 18-24 and 25-34** years old: 57.8% and 50.9%, respectively, believe that the **textile workshops** will be able to produce **clothing of Basque local brands**.

**Optimism is not strong regarding the future of the fashion industry in the Basque Country:** close to **50%** consider that the industry of the Basque Country will not be a benchmark in the sector and it will not have enough textile workshops to produce clothing of local brands.

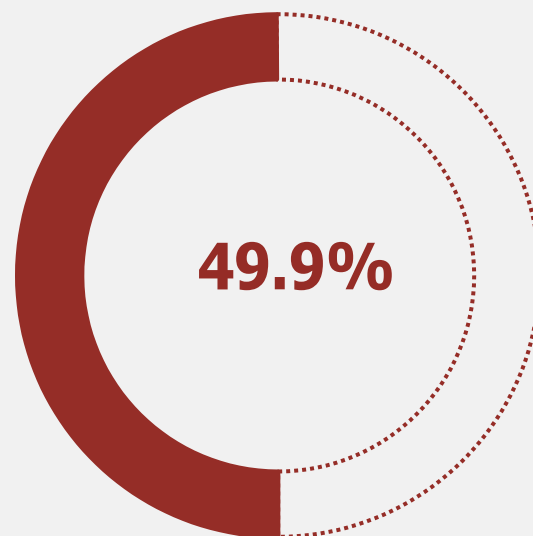


## Will tailors and dressmakers disappear in the Basque Country?

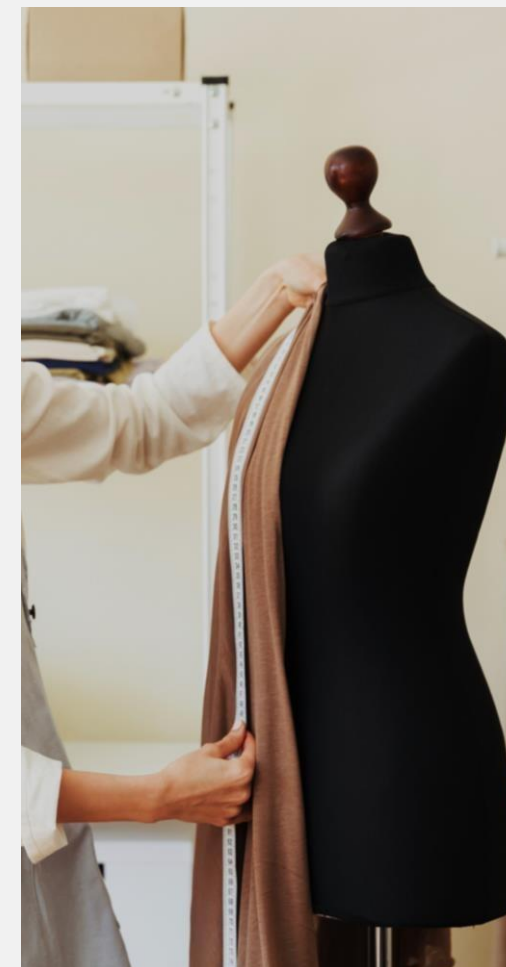
*Do you believe they will continue to exist in 2050...?  
Check all those necessary.*

% of the total population

*tailors and dressmakers*



**50%** believe that, **there will continue to be tailors and dressmakers** in the future.



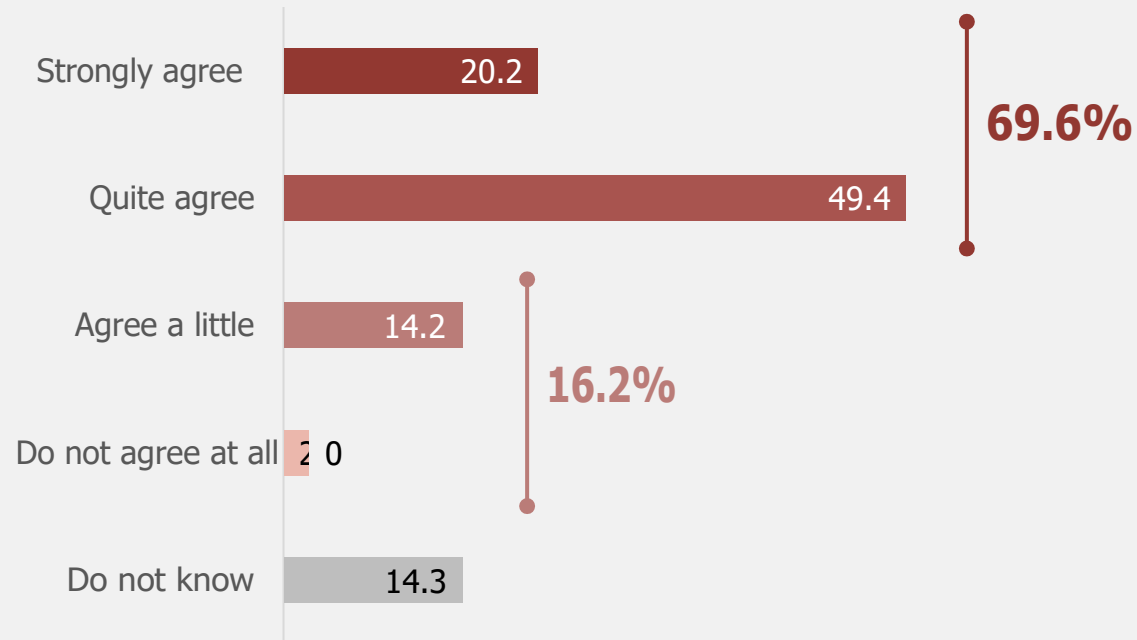
% of the total population

## Do we want a fairer distribution of the wealth that is generated by the textile industry?

Indicate your degree of agreement with the following statements related to the future of fashion.



*There should be a fairer distribution in the Basque Country of the profits generated by the fashion industry*



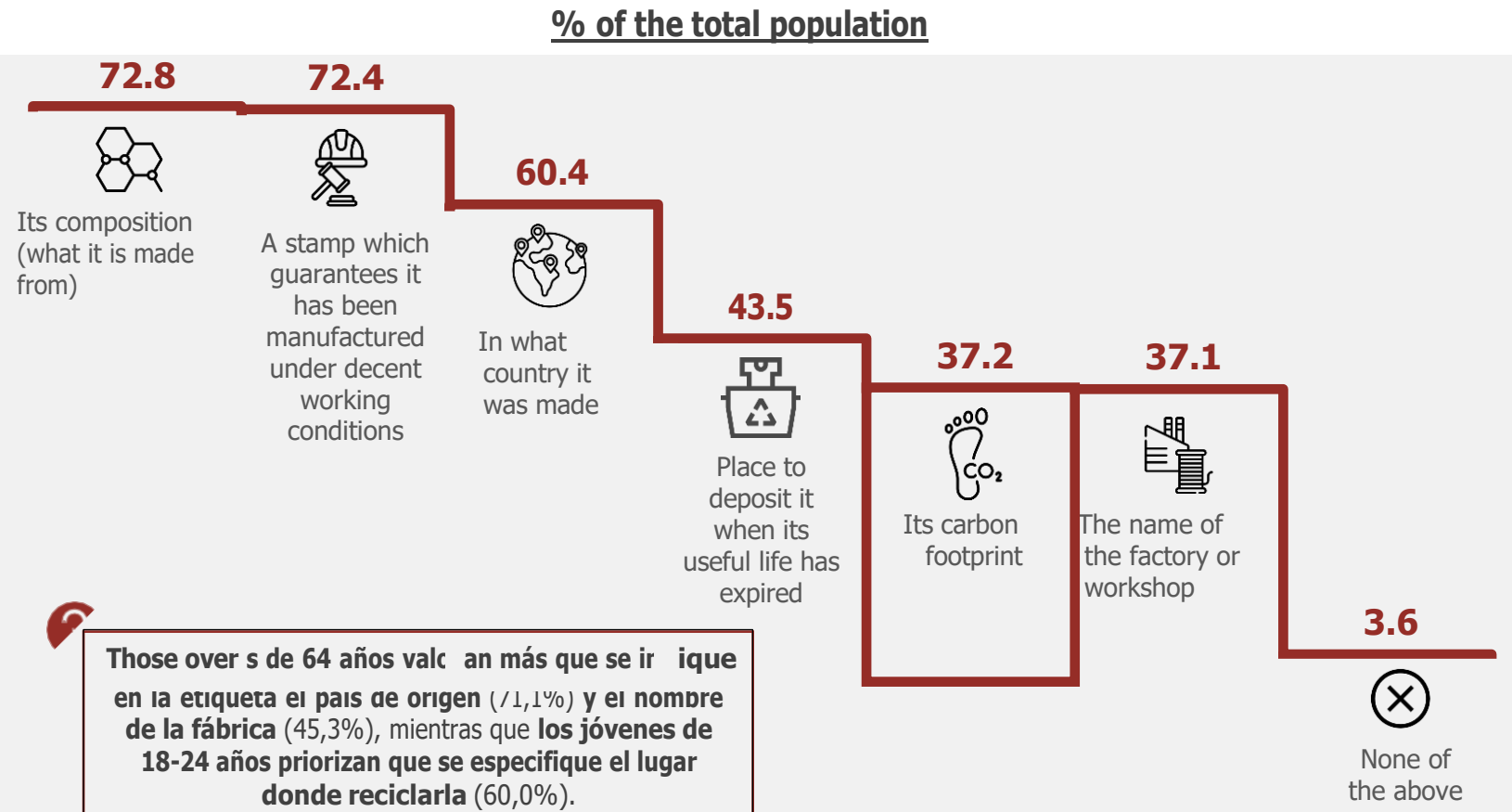
Citizens defend a **fairer distribution of the profits of the fashion industry in the Basque Country.**

A photograph of two women in a clothing studio. They are standing around a table covered with a white cloth, examining a peach-colored garment. The woman on the left is wearing a white shirt and a black vest, and the woman on the right is wearing a black blazer over a white top. In the background, there is a rack of clothes and a mannequin wearing a white top and a brown skirt. The text "07. How to regulate fashion?" is overlaid in the center of the image.

## 07. How to regulate fashion?

## The ideal clothing label of the future

Thinking about clothing labels, what would you like to find on your clothing label? Check all those necessary



The elements most demanded on clothing labels are the composition, a stamp ensuring it has been produced under decent working conditions and the country of manufacture.

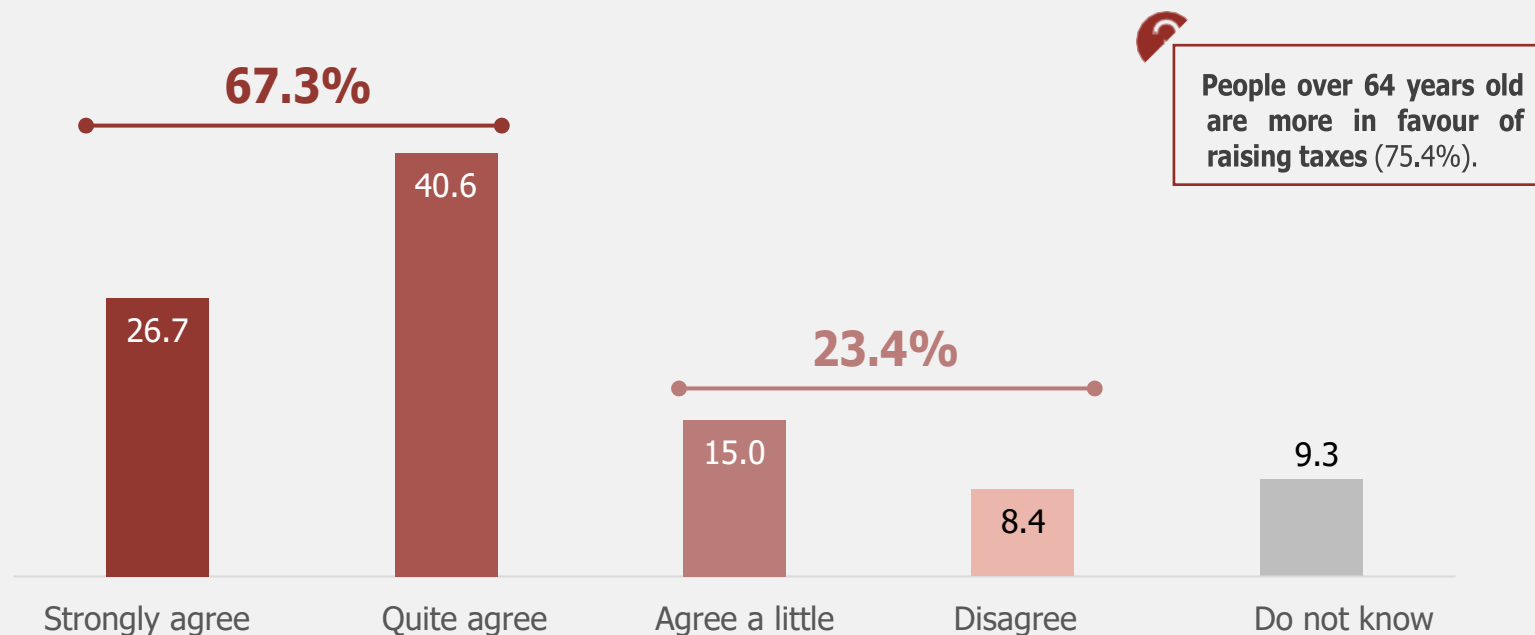
## Should taxation be increased for less sustainable clothing?

Indicate your degree of agreement with the following statements related to some of the challenges presented to the future of fashion.



% of the total population

*Taxation should be increased for less environmentally friendly clothing*



**Citizens are in favour of increasing taxation on less environmentally friendly clothing.**

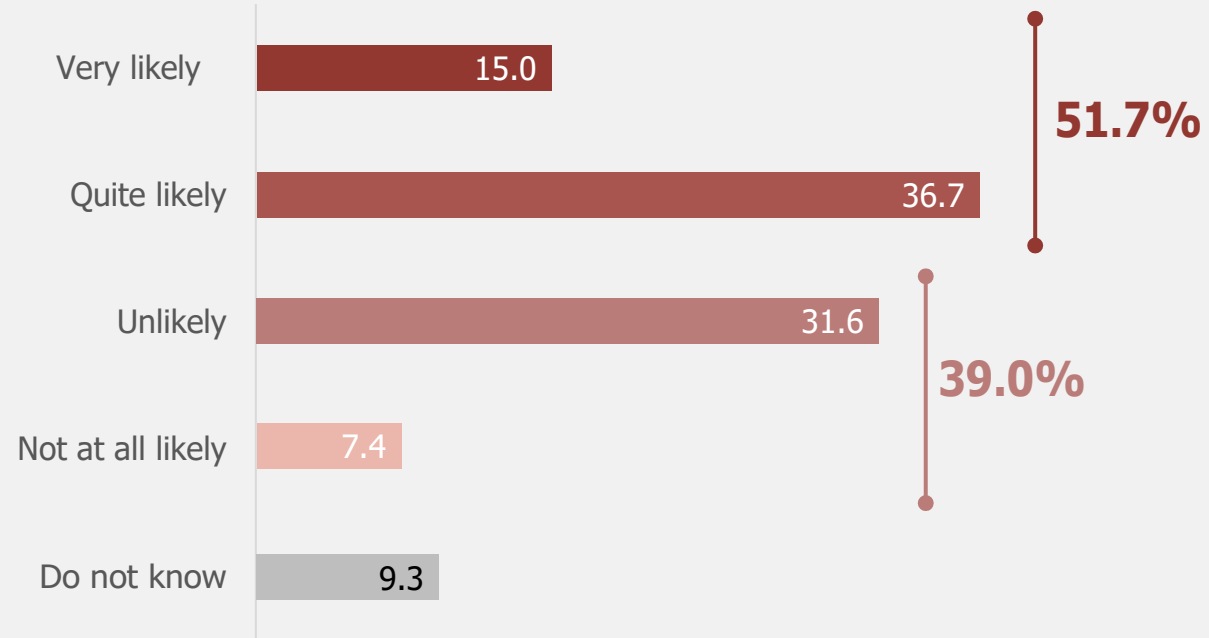
## Will the most harmful fabrics for the environment be banned?

Thinking about 2050, do you think it likely the following events will occur?



% of total population

*Governments will put a ban on less environmentally friendly fabrics*



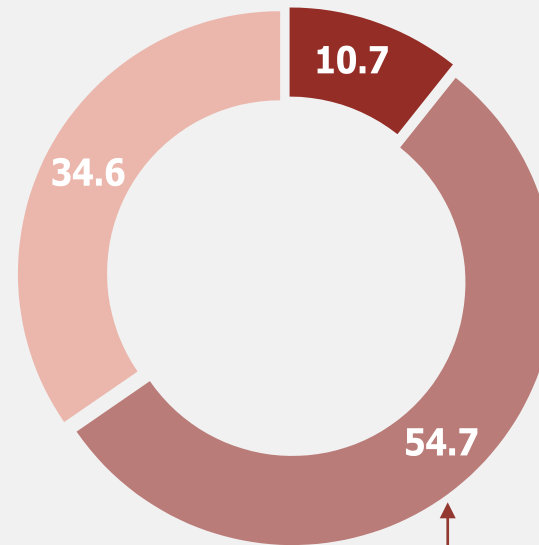
**And, more than half** believe that in 2050 **governments will put a ban on clothing which is more harmful to the environment.**



## What should be done about the international *fast fashion* store chains?

Which of the following statements about the future of international fast fashion store chains (not environmentally friendly cheap disposable clothing store chains) do you identify with most?

- They should continue as they have been doing so far
- They should have visible advertising on their premises about the damage they do to the environment
- They should disappear



Young people demand it to a large extent:  
64.7% between 18-24 years old and 60.4% between 25-34.



**A majority demand for *fast fashion* store chains to have advertising on their premises about the harm they cause the environment, and even 1 out of every 3 consider that this type of store chains should disappear.**

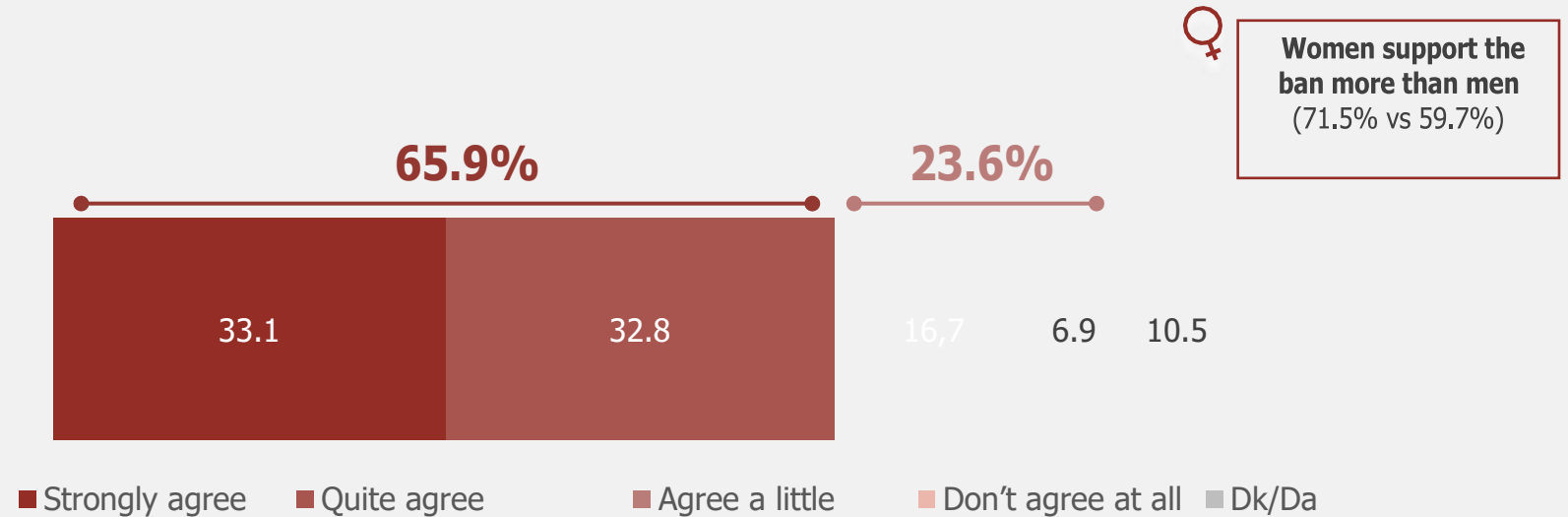
## Will animal farms used in making clothes for us to wear be banned?

Indicate your degree of agreement with the following statements related to some of the challenges facing the future of fashion.



% of the total population

*Governments should ban animal farms used in making clothes for us to wear*



**Support for putting a ban on animal farms used for clothing is widespread among Basque citizens.**



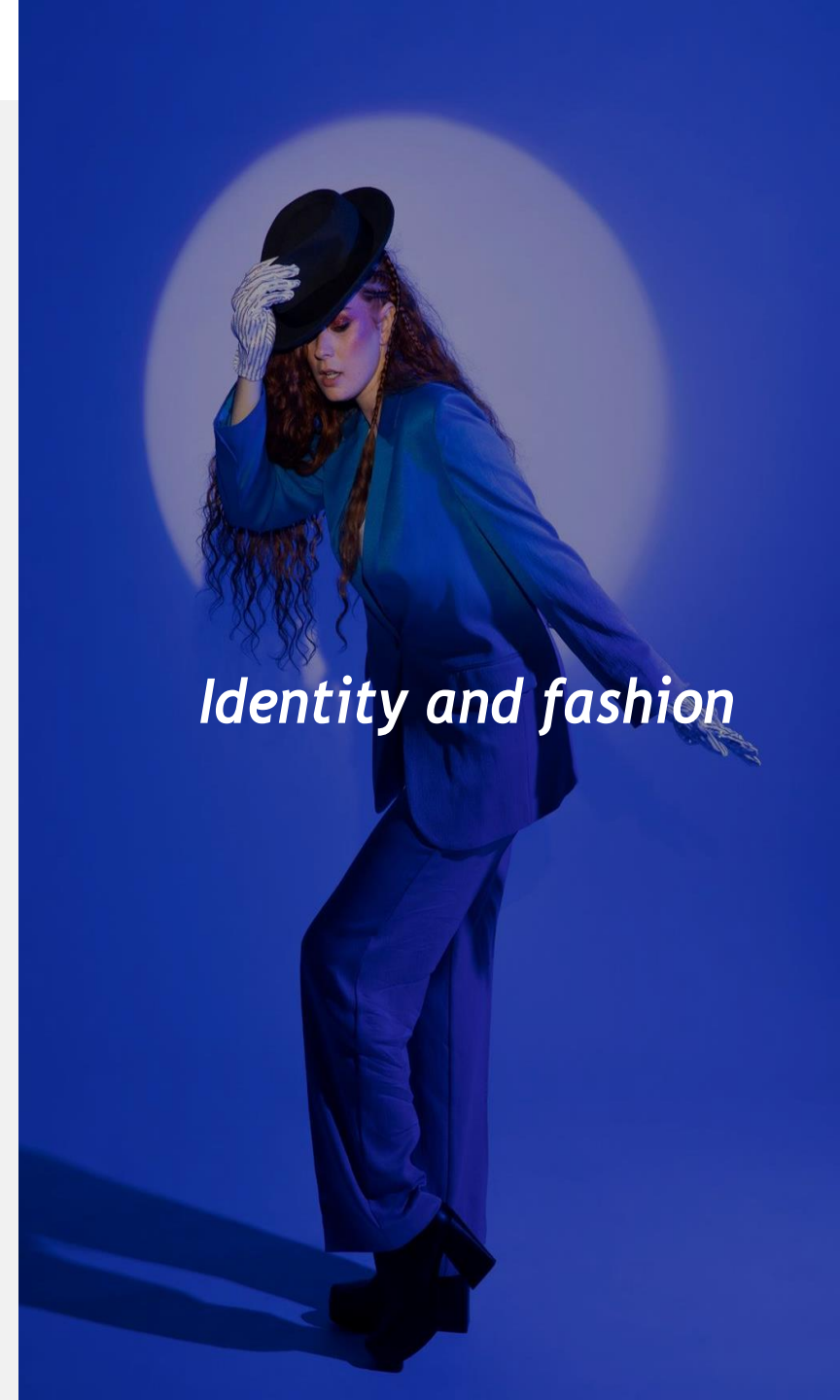
**08. Keys to the fashion of the future**

**#1** Although clothing is a key feature of its identity (73.8%), Basque society considers this relevance will decrease in the future. Furthermore, almost one out of every three believes we will dress worse in the future.

**#2** Even though the colour black is more extensively worn in society, almost 30% express their desire for blue to be the predominant colour in the future.

**#3** More than half of the respondents think that suits, ties and high-heeled shoes will continue to exist in 2050.

**#4** Only a minority, barely 20%, is in favour of men's and women's wear sections disappearing. Young people 18-24 years old are significantly more in favour of a gender-free fashion.



*Identity and fashion*



#1

The **majority of citizens** are familiar with the environmental problems related to the **fashion industry**. However, **only 34%** consider they have enough information to choose **environmentally friendly clothing**.

#2

In order to combat climate change, society considers that the **most effective measure is to reduce the consumption of clothing by buying only what is necessary** (72.3%). Almost 60% also advocate for buying clothing made with sustainable materials, place it in clothing bins, and to take care of and repair it.



*Climate change  
and fashion*



#1

Close to 60% **consider that we will have a greater commitment with the environment when dressing.** However, **there is no consensus on whether protecting the environment will be the main reason for buying clothing in the future:** this believed by 45.6%.

#2

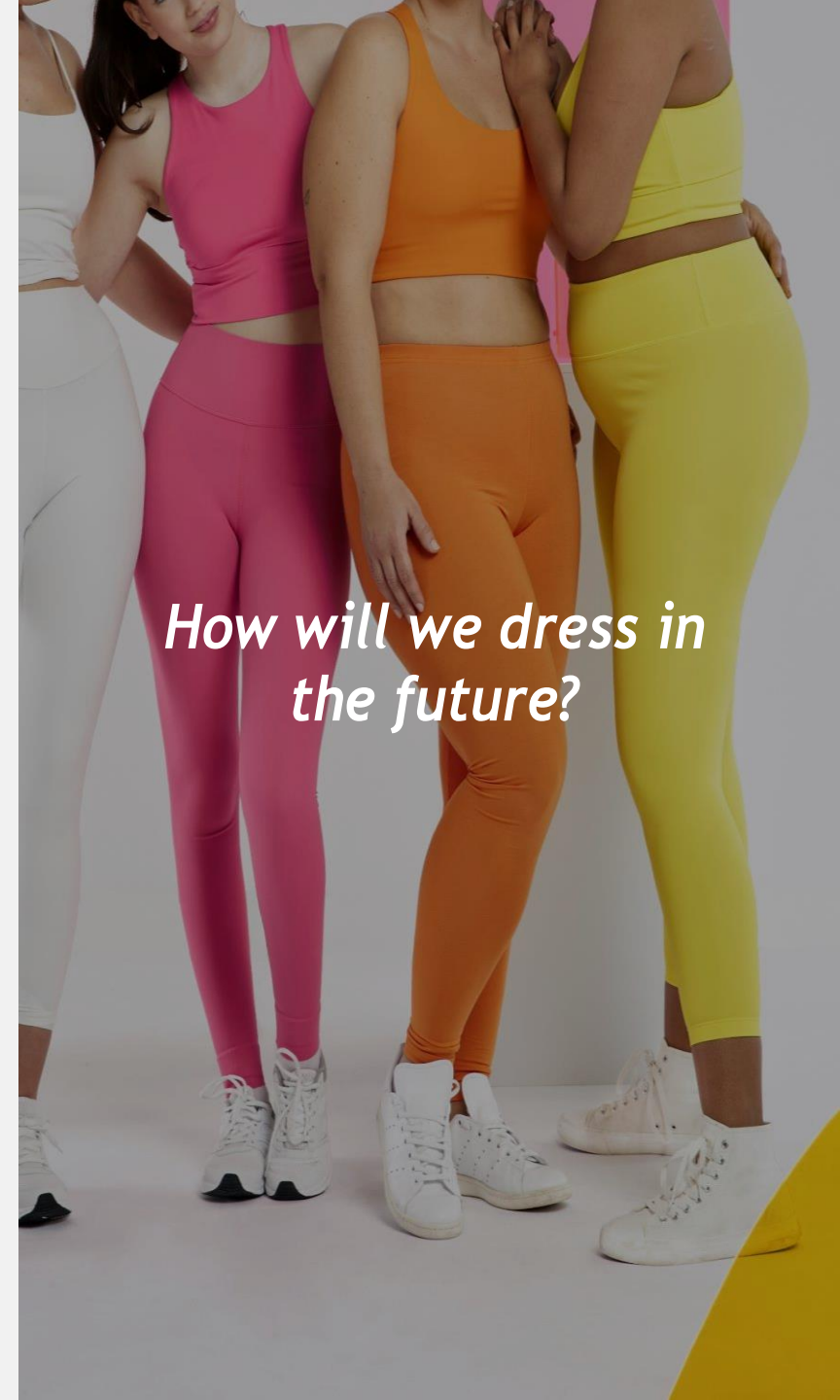
**Although society is not in favour of a gender-free fashion, the large majority** believe that **fashion should be more inclusive:** almost 90% demand that clothing come in all the sizes that exist in the population.

#3

As regards the changes they would like in the future, **the majority is not interested in a futuristic fashion:** less than 10% would agree with buying in a virtual world, using clothing manufactured with living fabrics and produced with sprays. Conversely, **they do defend a more sustainable fashion:** 50% want clothing to be biodegradable and more than 40% want clothing production to be reduced.

#4

Regarding the stores of the future, **almost 60% would like for there to be areas for placing, exchanging or selling clothes which are not used anymore.** Furthermore, **more than half are in favour of clothing that is not environmentally friendly be properly identified, that repair services be offered and for plastics to not be used.**



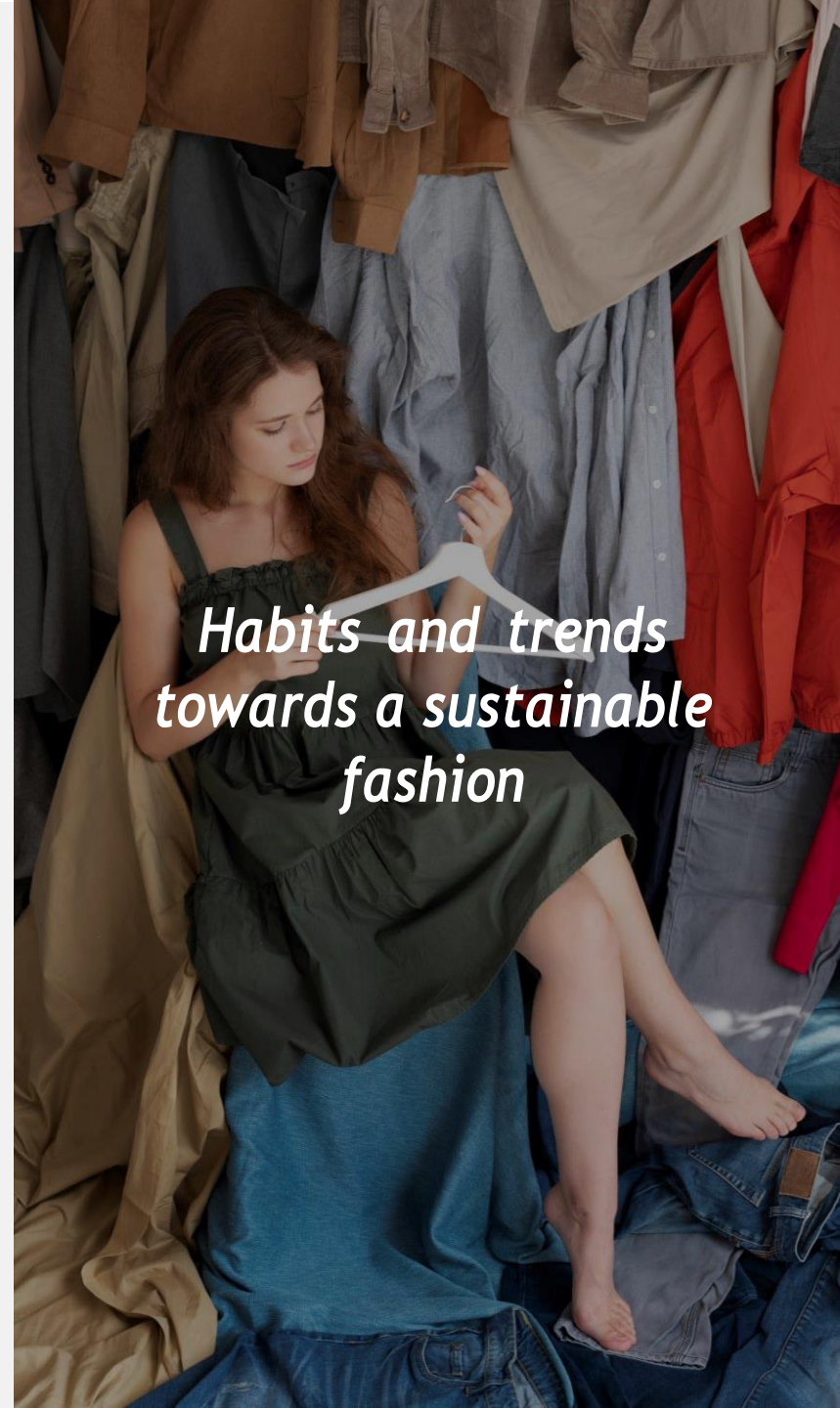
*How will we dress in the future?*

**#1** **Half of the citizens buy only necessary clothing**, whereas 40.4% consume more than they need.

**#2** **The majority** have as **most frequent habits placing unused clothing into specific bins, taking care of and repairing garments they have and only buying clothes they need.** By contrast, **renting out is an uncommon practice**, since only 3% of the respondents do so, and the majority are not prepared to do so.

**#3** Almost **half of the population** estimates that, by 2050, **the problem of throwing clothing into the garbage will persist.**

**#4** **58%** consider that **sewing at home will disappear in the future.** Conversely, **75%** of the Basque people believe that **sales will continue to exist in the future**, whereas a similar percentage think that **t-shirts for 1 euro will cease to be a common practice in the fashion industry.**



*Habits and trends  
towards a sustainable  
fashion*



**#1** Only half believe that tailors and dressmakers will continue to be relevant in the sector.

**#2** The large majority considers that **practices as common as sales will continue to exist in the future**, although more than 70% **perceive as negative that brands launch so many collections every year**. In fact, **a large majority hope that the fashion industry will evolve towards more environmentally friendly products** and considers that unsustainable practices, such as t-shirts for 1 euro, will disappear from now to 2050.

**#3** As regards the information that should be included on clothing labels, **the aspects most demanded are its composition (72.8%), a certificate which guarantees that it has been produced under decent working conditions (72.4%) and the country of manufacture (60.4%)**.

**#4** By being informed of the fashion industry's environmental problems, **society fully requires fast fashion store chains to inform consumers about the environmental impact of the products on their premises**, and a third of the population even considers that **these store chains should disappear**.



*The fashion industry:  
present and future*

#5

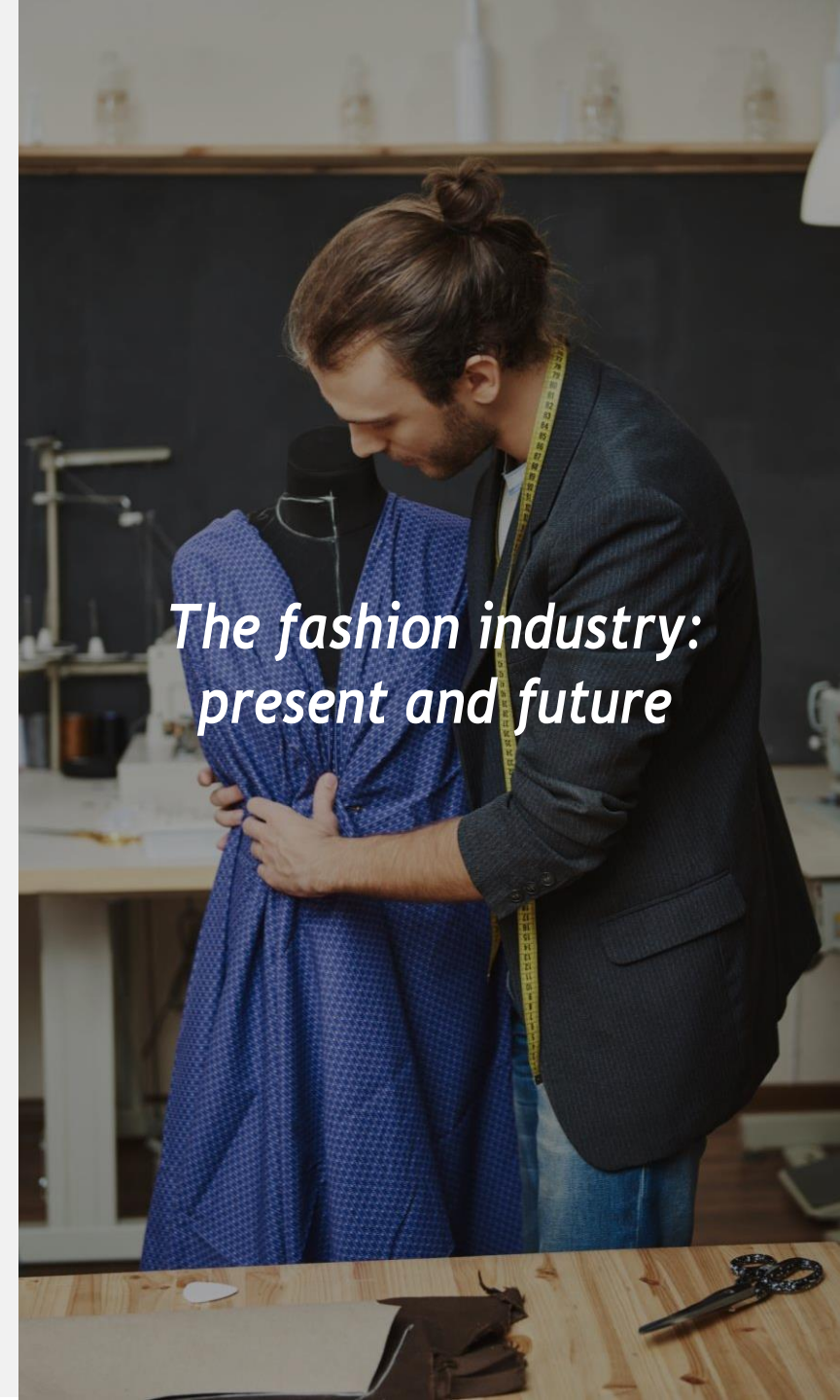
There is a **consensus** between citizens in the Basque Country **in favour of a fairer distribution of the profits generated by the fashion sector**. Furthermore, there is **unanimous support for increasing taxes on less sustainable clothing**.

#6

**More than half believe that governments will ban fabrics which are more environmentally harmful** by 2050 and more than 6 out of every 10 **support the banning of animal farms used in the fashion industry**.

#7

Finally, there is a predominant **pessimistic attitude** as regards the **future of the fashion industry in the Basque Country: almost half of the population believes the region will not be a benchmark in the sector** and there will be a **lack of textile workshops for producing local clothing brands**.



*The fashion industry:  
present and future*



The image shows a person's hand pointing at a bar chart on a printed document. In the background, a laptop screen displays a dashboard with various data visualizations, including a pie chart, a line graph, and a bar chart. The scene is set in an office environment with a desk and a plant visible.

## 09. Technical details



# Technical details



## UNIVERSE

Population resident in the Basque Country 18 years old and above



## SAMPLE SIZE

1.000 surveys

Quotas by sex, age and province



## FIELDWORK

From 27/02/2023 to 21/03/2023



## PROCEDURE

Online survey (CAWI)



## SAMPLING ERROR

$\pm 3.1$  percentage points, considering  $p=q=50\%$  and a confidence level of 95% on the assumption of simple random sampling.



## QUESTIONNAIRE

17 questions + socio-demographic questions



