

GLOBAL ADVISOR ON FASHION:

CONSUMER VIEWS ON THE SECOND-HAND MARKET AND SUSTAINABILITY

Françoise Hernaez & Maxime Gicquel,
Luxury Market Experts

12 March, 2020

GAME CHANGERS



FASHION:

BOOM IN THE SECOND-HAND MARKET

"True luxury is what can be repaired," said the former CEO of Hermès, Jean-Louis Dumas. Giving a second life to someone else's unwanted clothes or accessories is an approach that is gaining ground among the most affluent consumers and fashion followers. Latest figures from our World Luxury Tracking study on second-hand product purchases show a considerable rise of +11 points in the US and +9 points in Europe between 2017 and 2019.

The phenomenon is spreading beyond the Affluents and is now an increasingly common practice in the fashion world. Recent data from our 28-country Global Advisor survey finds that 41% of respondents have already purchased second-hand fashion items, accessories or shoes.

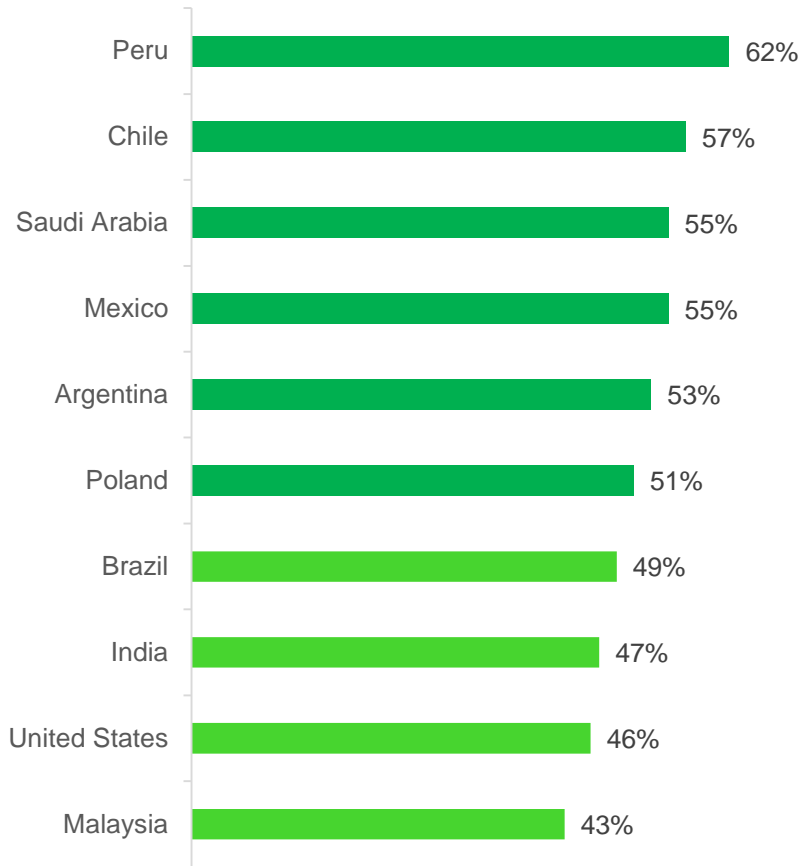
Of course, the motivations need to be balanced between economic choices in countries with strong constraints on purchasing power and style-related compromises with the development of a very high-end second-hand market as a consequence. This is notably the case in the US, with the "consignment store" offering the experience of the pleasure of buying, the pleasure of accessing historical - some would say iconic - items and, most of the time, at reduced prices compared to what you could find in regular stores today. It is important to remember that luxury goods do not depreciate, and sometimes their value even increases over time. Some luxury brands have understood this, such as the Swiss backpack brand Freitag, whose "upcycling chic" concept works very well, or Maison Martin Margiela, which has just presented its SS20 upcycling collection under the direction of John Galliano.



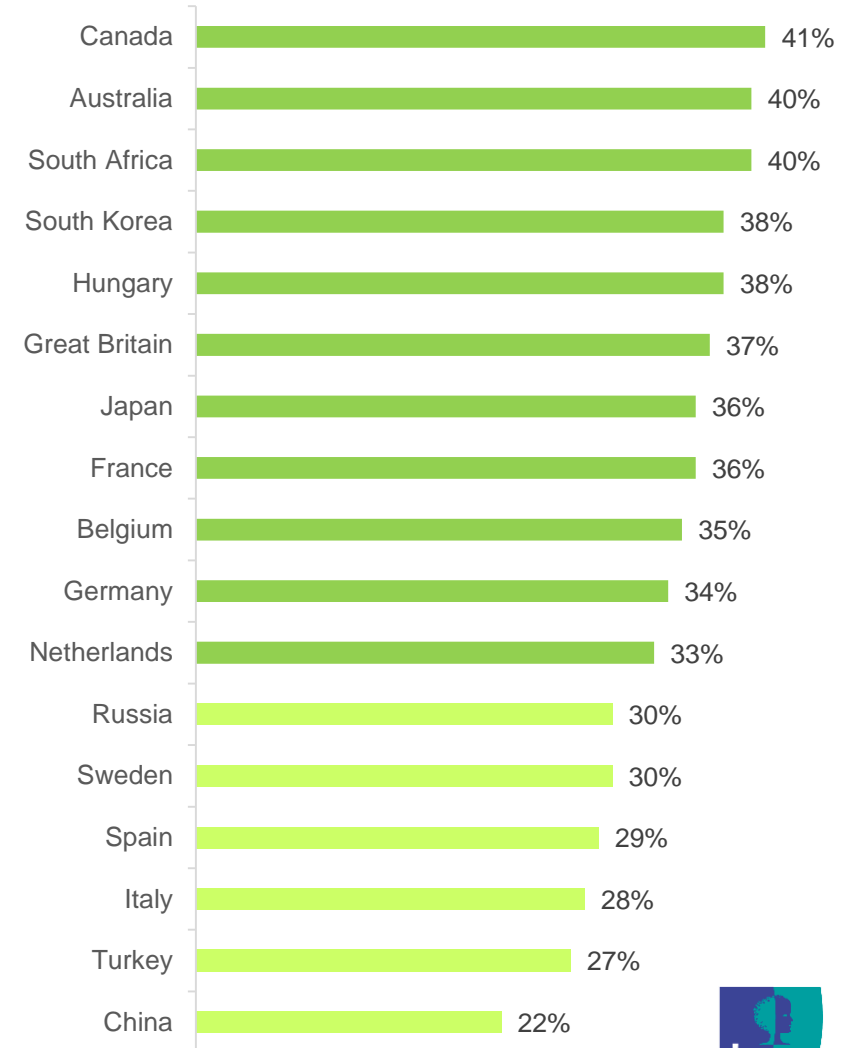
Photo by [Clem Onojeghuo](#) on [Unsplash](#)

GLOBALLY, 4 IN 10 HAVE PURCHASED FASHION APPAREL, SHOES OR ACCESSORIES FROM SECOND-HAND/CONSIGNMENT RETAILERS

Q. How often do you purchase fashion apparel, shoes and accessories from second-hand/consignment shops and websites/apps? (% often or sometimes)

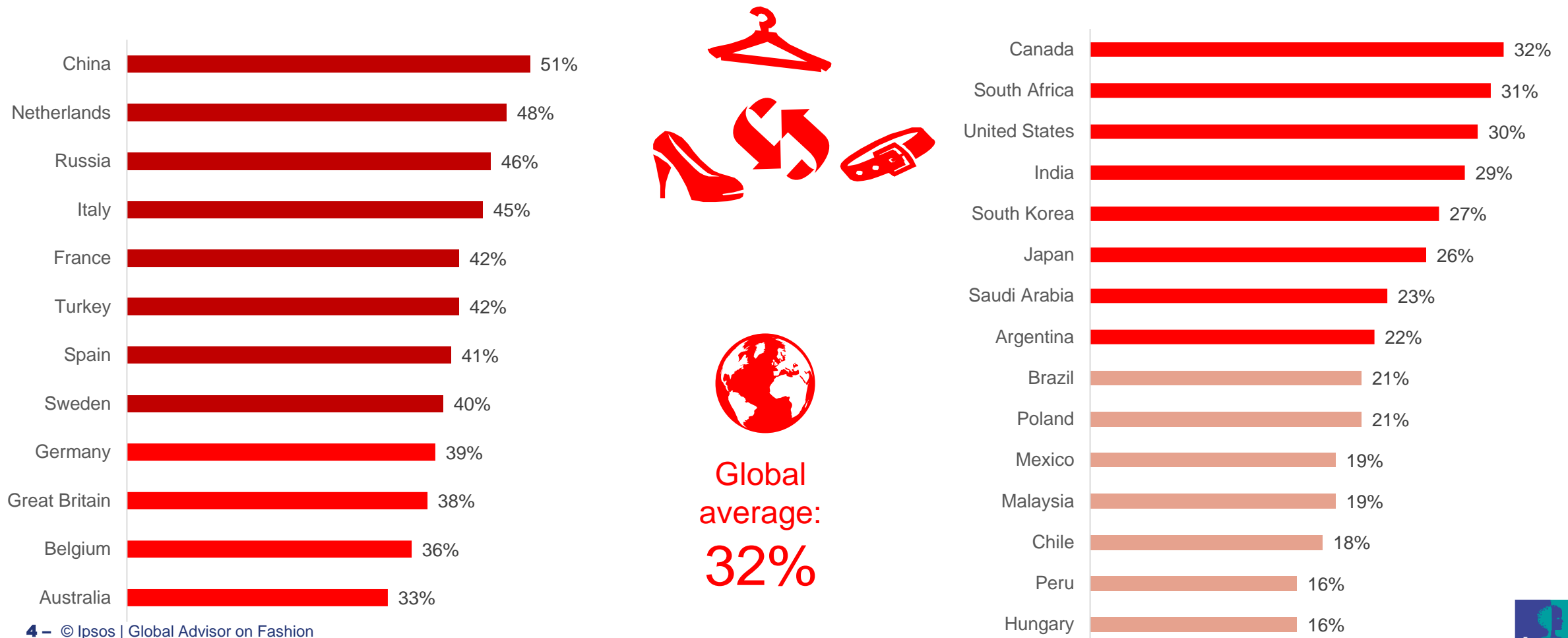


Global
average:
41%



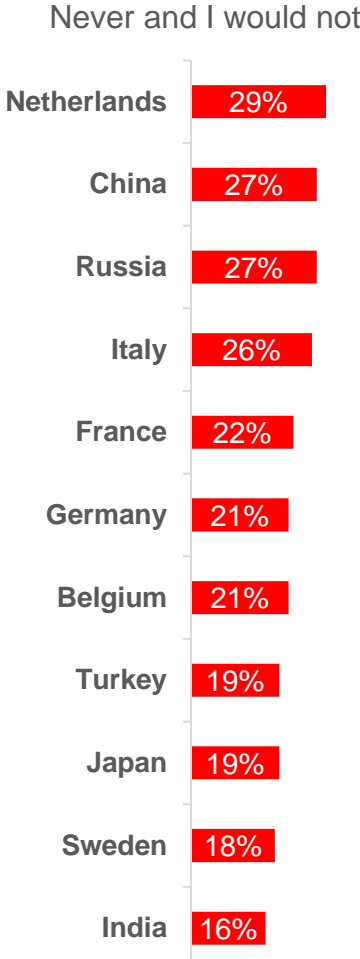
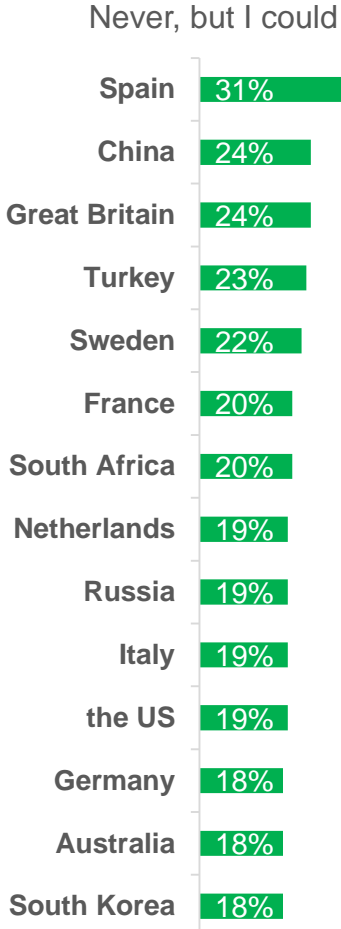
HALF OF CONSUMERS IN CHINA AND THE NETHERLANDS HAVE NEVER PURCHASED SECOND-HAND FASHION APPAREL

Q. How often do you purchase fashion apparel, shoes and accessories from second-hand/consignment shops and websites/apps? (% never)



SPAIN IS WHERE CONSUMERS ARE MOST OPEN TO SECOND-HAND FASHION; THE NETHERLANDS WHERE THEY ARE MOST AVERSE TO IT

Q How often do you purchase fashion apparel, shoes and accessories from second-hand/consignment shops and websites/apps?



FASHION

AN ETHICAL TURNING POINT

When it comes to ethical commitment, fashion brands still have a lot of work to do to gain credibility with the general public. Despite new agendas such as the Fashion Pact*, there is still a long way to go for those luxury brands that have just started making small steps towards a cleaner way of making tomorrow's fashion. Indeed, a large majority (63%) of Global Advisor respondents consider that luxury brands are no more environmentally friendly than other brands. Those in European countries and the US felt most strongly about this, while the Middle East, China and India were more lenient.

For a long time, niche brands have set an example in that area. In 2011, Rombaut began using vegetal fibres to make sneakers that are 100% vegan. In 2015, Neith Nyer started setting the tone with an entirely vegan collection. And, as of today, numerous formerly under the radar labels such as Nanushka, Andrea Crews and Jill Milan have taken sustainability to a new level in fashion.

Bigger players in the industry are now expected to do the same, but the challenges are complex given their scale. What is now expected from them is not solely doing more for a cleaner production but also involving more transparency in their communication on the matter. Fashion companies will have to take this issue seriously or else face the risk of being accused of unresponsiveness, or worst, green washing.

Authors: Françoise Hernaez, Maxime Gicquel, luxury market experts.

*The Fashion Pact brought together over 150 industry stakeholders, including Kering and LVMH, who has recently invested in Maison Stella McCartney.



Photo by [BYØRK](#) on [Unsplash](#)

THE FASHION INDUSTRY & THE UP-CYCLING

Some examples



**Maison Martin Margiela
PFW 2020**



Freitag



Rombaut

BOOKS OUR WORLD SUSTAINABILITY

Nanushka

SEARCH MU / HUF



CRAFTSMANSHIP

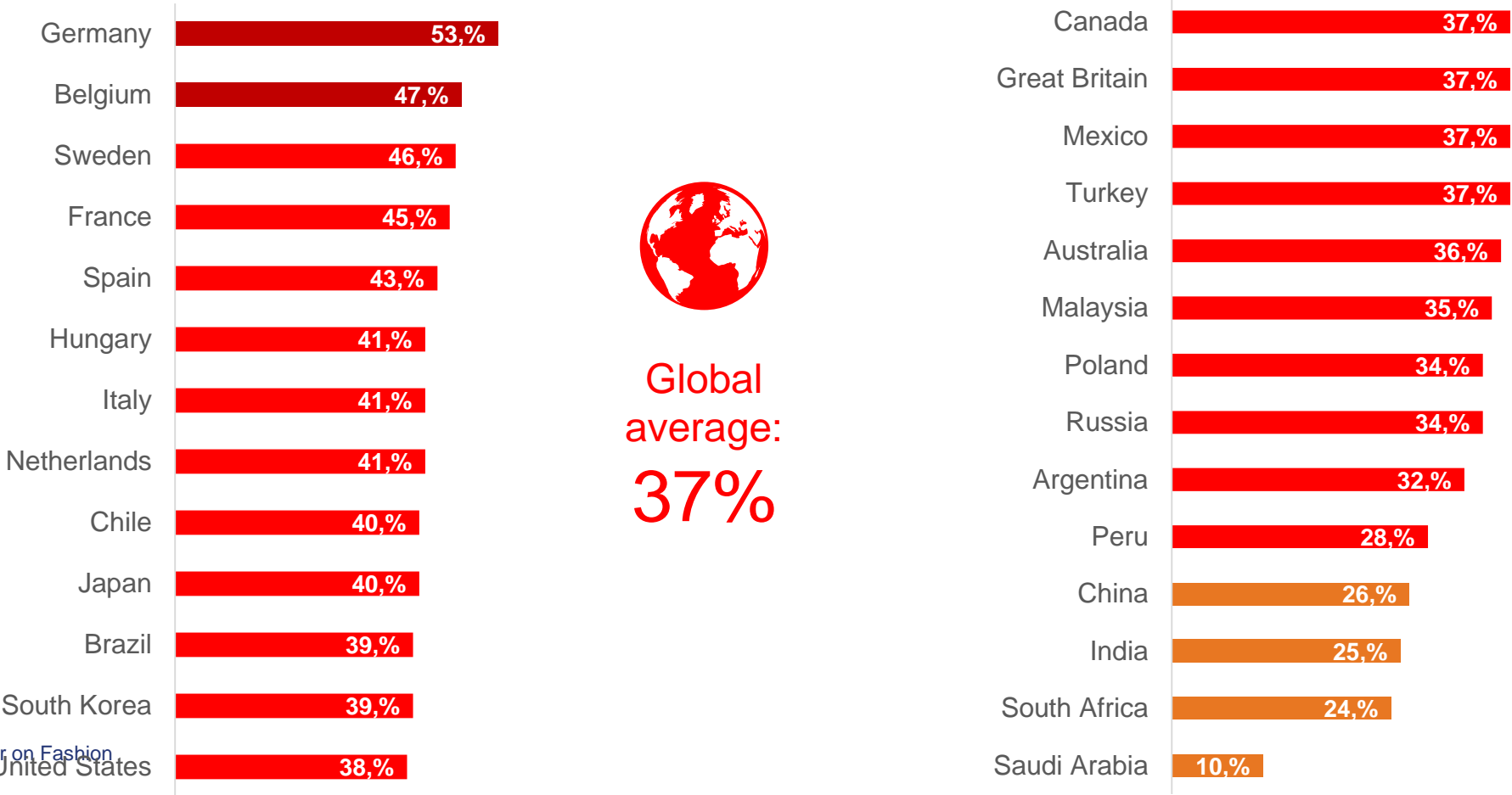
We define craftsmanship as an intelligent use of materials that unites function with beauty, heritage with technology. Craftsmanship shows us new ways to use materials and save them from becoming waste. It also makes it possible to empower communities by providing job opportunities in crafts, increasing their health and wellbeing and supporting them to be active participants of society. To us, craftsmanship is a way of doing business: we know the people behind our products, this is how we rebel against facelessness. Craftsmanship taps into emotional values too, encouraging a deeper, long-standing connection between the consumer and the clothes: the things we make with love and care are made to be loved and cared for by those who wear them.

EXPERIMENTATION & PROGRESSIVISM

We pledge to stay experimental and progressive. We strive to transform the way fashion is made, perceived and consumed by implementing new business models, by the purposeful use of technologies, considered materials and always seeking new solutions.

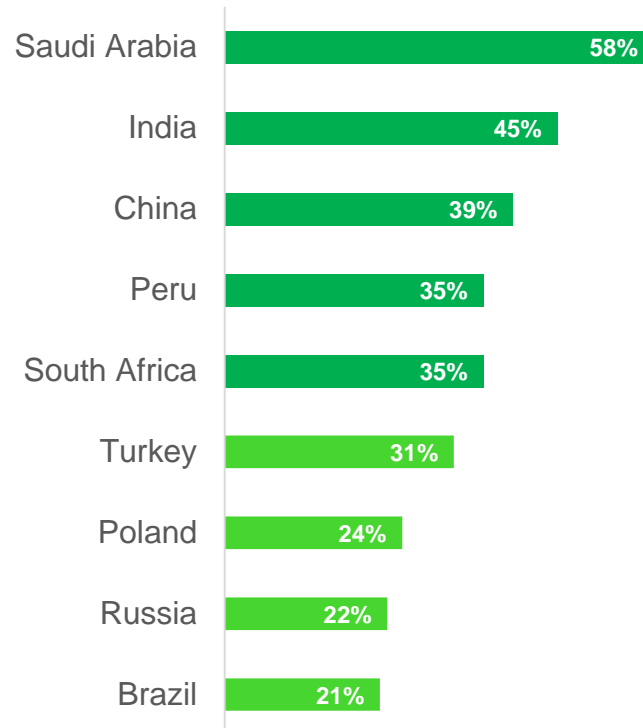
NEARLY 4 IN 10 CONSUMERS GLOBALLY *DISAGREE* THAT LUXURY BRANDS RESPECT THE ENVIRONMENT MORE THAN OTHER BRANDS

Q. Luxury brands are more respectful of the environment than other brands in the apparel/ fashion/ accessories industry (% strongly or somewhat disagree)

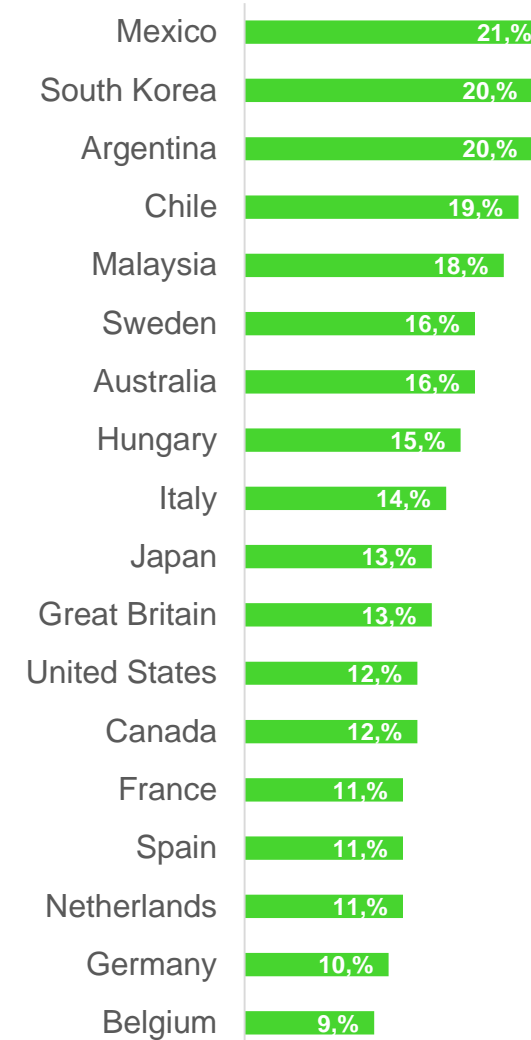


AGREEMENT THAT LUXURY BRANDS ARE MORE RESPECTFUL OF THE ENVIRONMENT IS WIDESPREAD ONLY IN A HANDFUL OF COUNTRIES

Q/ Luxury brands are more respectful of the environment than other brands in the apparel/ fashion/ accessories industry (% agree strongly or somewhat)



Global average:
21%



METHODOLOGY

These are the findings of a survey conducted in 27 countries via Global Advisor, the online survey platform of Ipsos, between 24 January and 7 February, 2020. For this survey, Ipsos interviewed a total of **20,204** adults aged: 16-74 in Argentina, Australia, Belgium, Brazil, Chile, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Netherlands, Peru, Poland, Russia, Saudi Arabia, South Korea, Spain, and Sweden; and 18-74 in Canada, South Africa, Turkey, and the United States of America.

The sample consists of 1,000+ individuals in each of Australia, Brazil, Canada, China, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and of 500+ individuals in each of the other countries surveyed.

The data is weighted so each country's sample composition best reflects the demographic profile of its adult population according to the most recent census data, and to give each country an equal weight in the total "global" sample. Online surveys can be taken as representative of the general working-age population in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Netherlands, Poland, South Korea, Spain, Sweden, and the United States. Online samples in other countries surveyed are more urban, more educated and/or more affluent than the general population and the results should be viewed as reflecting the views of a more "connected" population.

Sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. The precision of online surveys conducted on Global Advisor is measured using a Bayesian Credibility Interval. Here, the poll has a credibility interval of +/-3.5 percentage points for countries where the sample is 1,000+ and +/- 4.8 points for countries where the sample is 500+. For more information on the Ipsos use of credibility intervals, please go to: https://www.ipsos.com/sites/default/files/2017-03/IpsosPA_CredibilityIntervals.pdf.

Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses.

The publication of these results abides by local laws and regulations.

FOR MORE INFORMATION, CONTACT:

Françoise Hernaez

francoise.hernaez@ipsos.com



Maxime Gicquel

maxime.gicquel@ipsos.com



**THANK
YOU**

GAME CHANGERS

