

FARFETCH

UNDERSTANDING THE ENVIRONMENTAL SAVINGS OF BUYING PRE-OWNED FASHION

IN PARTNERSHIP WITH QSA, ICARO AND
LWARB



For information on this research or access to the raw data
collected please contact positively@farfetch.com.



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About this report

Luxury resale represents \$24 billion+ market and is growing four times faster than the primary luxury market. Two of the main drivers spearheading this growth are online resellers and consumer interest in sustainable fashion (**source**).

Farfetch has been selling a curated selection of pre-owned fashion online since 2010, and in 2019 launched two pilots offering customers services to sell (**Farfetch Second Life**) or donate (in partnership with **Thrift+**) their pre-owned items.

We wanted to better understand the environmental benefits of these pilots to use in future business cases, as we continue to focus on and implement projects to reduce our environmental impact as a business. Existing data was limited, so we commissioned research in two areas:





1. Displacement rates

Does the purchase of a pre-owned fashion item replace the purchase of a new item (therefore reducing the demand for additional items that require new resources)?

The main source of research on displacement rates was carried out in the UK in 2013 by WRAP – a study limited to the UK and charity shop purchases. The aim of our research was to provide an updated figure that reflected the recent rise in interest and demand for pre-owned fashion, and that also considered geographical differences and purchase avenues.

For this we used an online survey of people who had bought pre-owned in 2019 (see page 18 for a full list of questions) with a total of 3,000 respondents evenly spread across three markets: the UK, the US and China.

2. Environmental impacts

What are the average environmental impacts (carbon, water, waste) for fashion items, which can be applied with the displacement rate above to give an indication of the environmental savings when someone purchases a pre-owned item?

For this, we used existing data sources which provided the average environmental impact of different fibres, average compositions of garments and average garment weights. These provide an indication of carbon, water and waste impact per garment. Calculating the environmental impacts of fashion items is significantly influenced by multiple external factors, and robust analysis requires specific and in-depth life-cycle data that takes into account all impacts across a product's life (e.g. sourcing raw materials, primary and secondary manufacturing, distribution, retail, use and end of life). This research used data which is publicly available and accounts for life-cycle impacts where possible. For the purpose of this research this gives a good indication of the potential average environmental impacts.





We are sharing our findings as we hope this information will be of interest and use to the rest of the fashion industry and wider stakeholders.

If you would like to access the raw data from the survey or the calculations for the environmental impact, please contact positively@farfetch.com.

To help engage consumers in this information we have created a **fashion footprint tool** for consumers to understand how their pre-owned and conscious fashion choices can impact the planet.

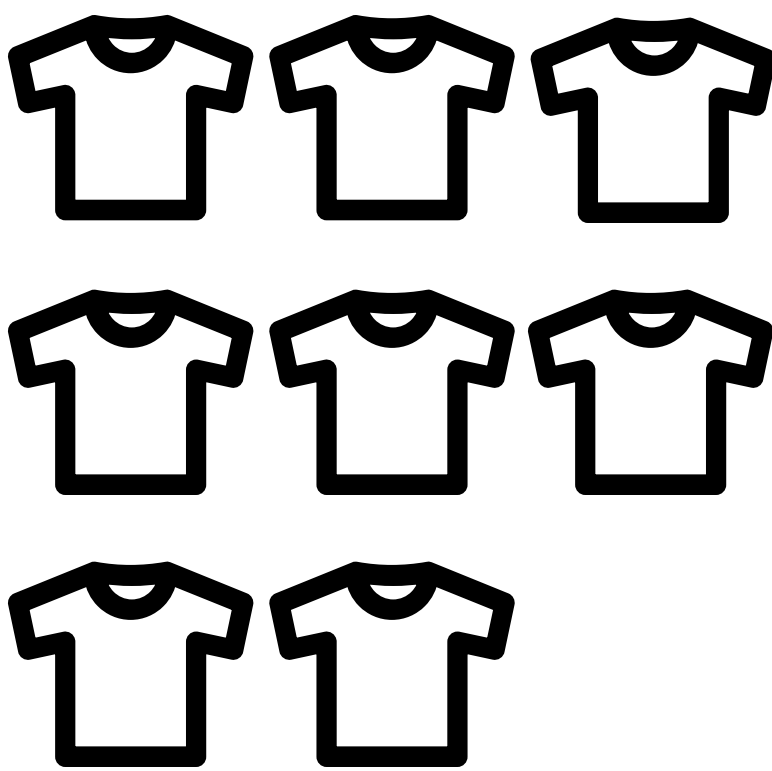
FARFETCH

KEY FINDINGS

Statistics are based on a survey of 3,000 'Pre-owned buyers' (people who have purchased at least one pre-owned item in the last year) in the UK, US and China (1,000 per market).



On average they purchased eight pre-owned items in 2019



of pre-owned items, buyers were actively searching for pre-owned

Where pre-owned buyers are buying



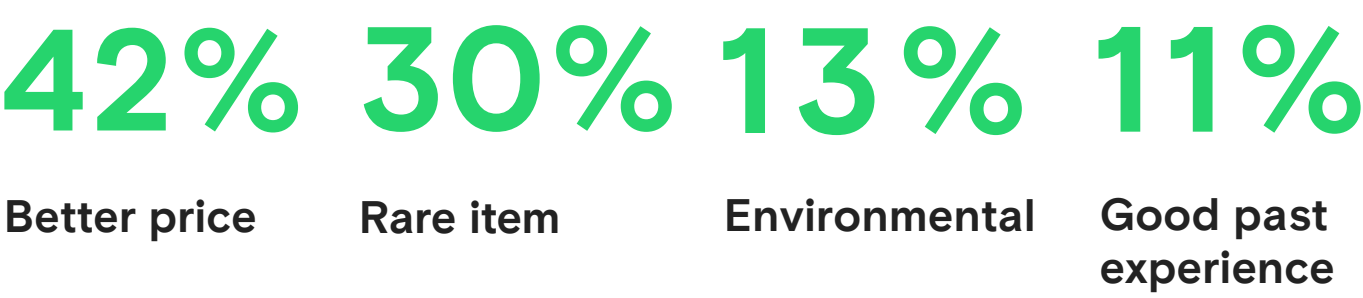
US 74%, UK 62%, China 42%



US 26%, UK 38%, China 58%



Top four reasons for buying pre-owned

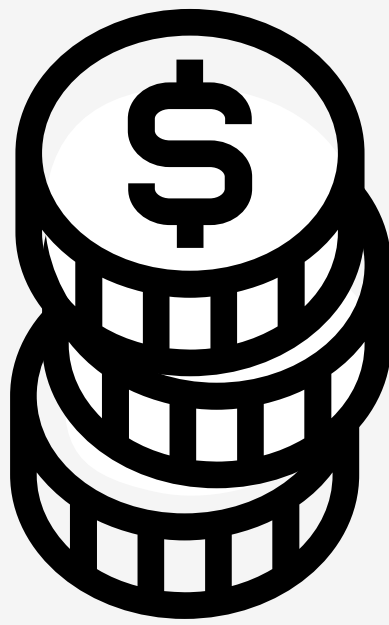


* China are more likely to purchase pre-owned items due to item rarity, where as the US and the UK are more driven by a better price

Average spend per pre-owned item



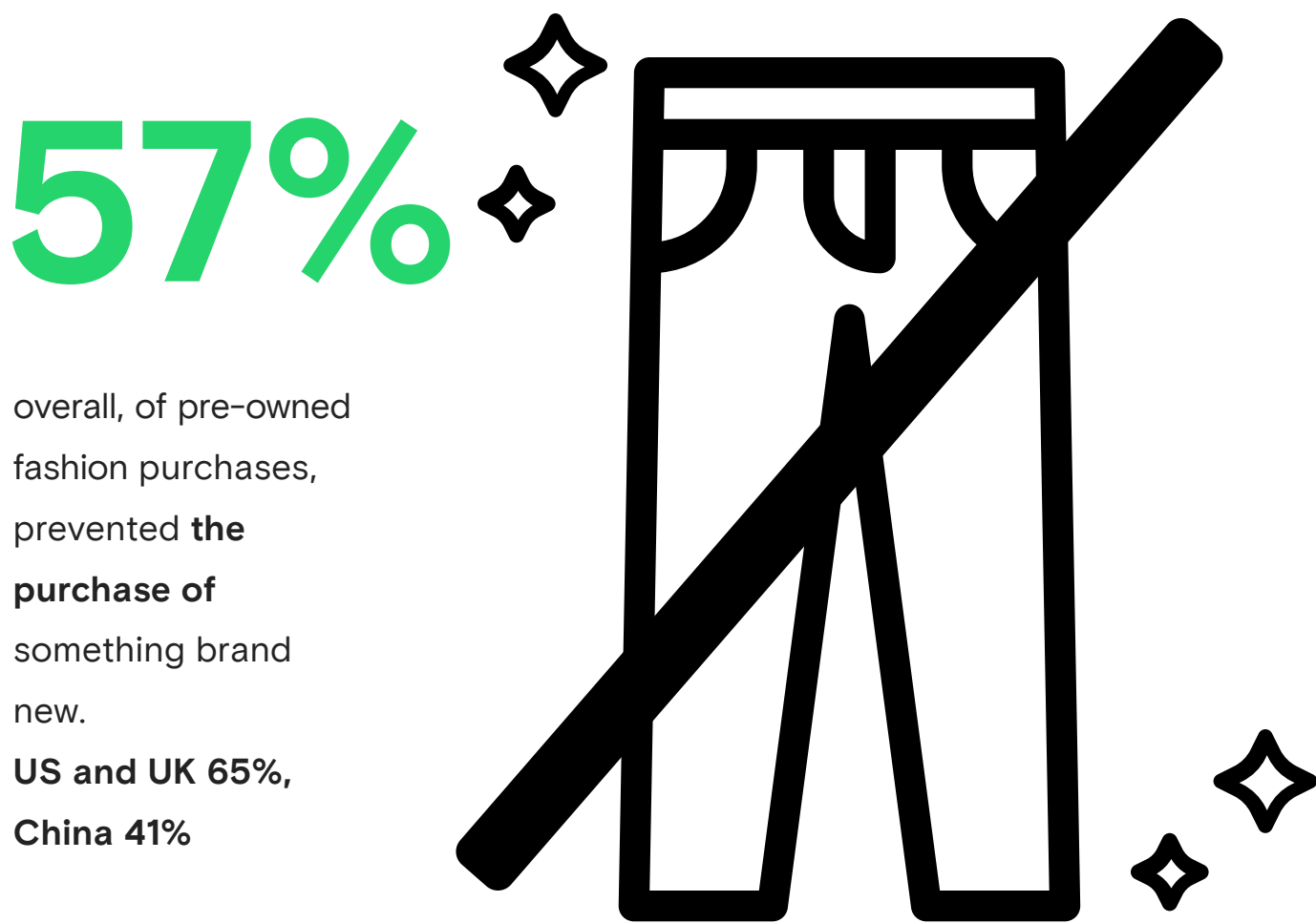
US \$59



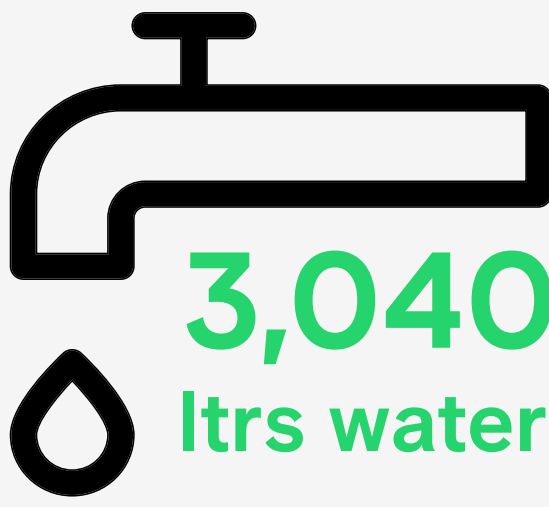
CN \$88



UK \$47



On average one pre-owned purchase saves



Methodology: Displacement

CALCULATING THE DISPLACEMENT RATE

When considering the displacement rates it is worth noting:

- The fieldwork took place between 29 November – 9 December 2019.
- It was based on an online survey completed by 1,000 consumers per market aged 18+ in the US, UK and China (total of 3,000) who had all purchased at least one pre-owned item in 2019.
- Respondents were not a nationally representative sample. The research focused specifically on people who had purchased pre-owned items in 2019 to ensure a significant sample size. For example, in the UK and US, this skews the mix of female respondents up to around 60% where nationally it is 51%. Please see page 16 for details on demographics for each market.
- Base population sizes vary by question and are always stated in the appendix slides. Some of the findings' data is based on "respondents" and some is based on "items of clothing". Respondents could answer all questions for up to four pre-owned purchases.
- We asked 27 questions in total to get as full a picture as possible about those pre-owned purchases. See page 18 for the full list of questions.

Methodology: Displacement

To calculate the displacement rate we used two core questions with the following weighting: **Q14a.**

Which of the following statements best applies about each of the items you purchased?

1. Buying this second hand/vintage prevented the purchase of a new item (i.e. it meant that I didn't have to buy the same item new).

[Displacement = 100%]

2. Buying this second hand/vintage purchase did not prevent the purchase of a new item (i.e. I purchased the same item new around the same time). [Displacement = 0%]

3. It's difficult to say if buying this second hand/vintage prevented the purchase of a new item. [Go to Q14b]

Q14b. You said that it's difficult to say if buying this second hand/vintage prevented the purchase of a new item.

Which of the following best applies?

1. It probably prevented the purchase of a new item, for example I didn't buy a similar item new for quite a while afterwards.

[Displacement = 50%]

2. It probably did not prevent the purchase of a new item, for example I purchased something similar around the same time or quite soon afterwards. [Displacement = 0%]

Methodology: Displacement



EXAMPLE CALCULATION

50% say it prevented the purchase of a new item (100% displacement); 20% said it probably did (50% displacement); 10% probably not (0% displacement); 20% it did not (0% displacement) = Average rate of displacement: $50\% + 10\% + 0\% + 0\% = 60\%$.

Methodology: Displacement

Alternative ways of asking the question around displacement, returns a similar overall result.

Another survey, conducted in October 2019 by QSA on a UK nationally representative sample, asked respondents about displacement using a different question structure and yielded similar results. Over half of people declared that their second hand/ vintage clothing purchase prevented them from purchasing a new item. This gives us even more confidence that our results are a true reflection of displacement behaviour.

There is not a defined best-practice methodology of how to ask and calculate displacement rates, but we took guidance from QSA, ICARO and other stakeholders . ¹

¹ There is not a defined best-practice methodology of how to ask and calculate displacement rates. Below we outline the rationale behind the displacement calculation, and the raw survey data can be provided should others want to apply their own methodology.

When deciding how to ask the questions which would calculate the displacement rates, two of the main challenges were: When should we ask the question in the purchase journey? In the 2013 displacement research by WRAP, respondents were asked immediately after a purchase in a physical charity shop. We wanted to give the respondent time after the purchase, to reflect and realise if their purchase truly displaced a brand new purchase or not. In the survey we asked for purchases that had been made within 2019, and took (up to) the most recent four purchases forward to the more detailed questions. We found that most of the items carried forward were recent purchases, meaning the respondent likely had time to reflect but not so long they weren't able to accurately remember. Will respondents be sure if their purchase was a true displacement? Within the question, we included an option for if the respondent was uncertain and applied a zero percent (probably didn't prevent the purchase of a new item) or a 50% (probably did prevent the purchase of a new item) displacement rate. While we were originally concerned with the best way to resolve displacement for respondents who were uncertain about the displacement impact, the outputs from the survey showed that roughly only 10% of respondents said they were uncertain about the displacement.

Methodology: Environmental Impacts

For this, we used publicly available existing data sources, which provided the average environmental impact of different fibres, average compositions of garments and average garment weights. This data was combined and used to calculate average carbon, water and waste impacts per garment. Calculating the environmental impact of fashion items is highly influenced by multiple external factors and robust analysis requires more specific and in-depth life-cycle data. This research aims to provide a good indication of potential average environmental savings. The main sources used for calculating material impacts and associating these to different garments were:

Environmental impact (carbon, water and waste) for material types. The main sources used were:

1. WRAP's Valuing Our Clothes evidence base
2. The GLASA State Of The Apparel Sector Special Report on water

Garment weights from the European Commission's Environmental Improvement Potential of Textiles (IMPRO Textiles) report. This is a broad study, but detailed and robust information on current garment weights was difficult to source – it is not common industry practice to share this information.

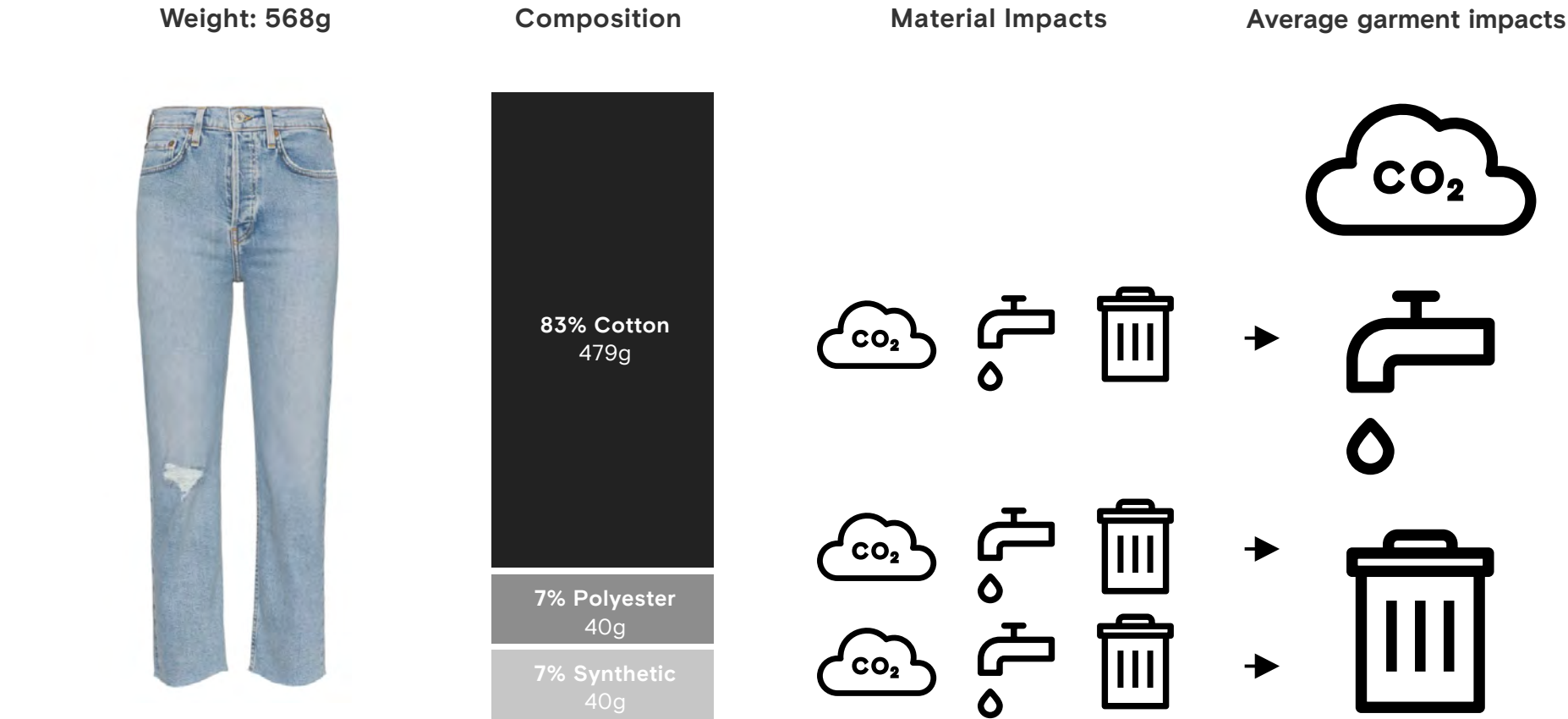
Garment composition data from the European Commission's IMPRO Textiles report and ECAP European Clothing Impacts Study.

For a full list of data sources see page 110.

Methodology: Environmental Impacts

We combined the weight, composition and impact data to estimate the total environmental impact of each garment category, as shown in this figure below.

Methodology of calculating item impact



Methodology: Environmental Impacts

Average impacts per item:

Item type	kg CO2(e)	ltrs water	kg waste
Dress/Jumpsuit	27	1,813	2
Jacket or blazer	27	1,427	1
Coat	53	1,922	2
Suits	36	1,621	1
Tops & T-shirts (incl shirts & blouses)	12	2,333	1
Tracksuits	12	1,423	1
Trousers (excl denim)	16	4,073	1
Skirt	10	2,129	1
Denim jeans or jacket	16	5,455	1
Leather handbag	10	8,206	0

Combining Displacement and Environmental Impacts

Displacement and environmental impacts can be used together to calculate the average environmental impact savings when selling or purchasing pre-owned items. For any one individual item, if you know for certain a pre-owned purchase or sale has (or hasn't) replaced a new sale, there is no need to apply the displacement calculation.

An example of the potential environmental savings of purchasing pre-owned, based on a 65% displacement rate.

Item type	# items sold	Displacement %	# new items displaced	Total reused weight (kg)	kg CO2(e)	litres water	kg waste
Dress/Jumpsuit	100	65%	65	73	1,761	117,846	107
Jacket or blazer	100	65%	65	46	1,784	92,773	71
Coat	100	65%	65	98	3,454	124,944	144
Suits	100	65%	65	60	2,317	105,339	92
Tops & T-shirts (incl shirts & blouses)	100	65%	65	26	758	151,614	40
Tracksuits	100	65%	65	31	755	92,480	42
Trousers (excl denim)	100	65%	65	37	1,045	264,760	58
Skirt	100	65%	65	25	651	138,395	38
Denim jeans or jacket	100	65%	65	37	1,013	354,547	59
Leather handbag	100	65%	65	33	619	533,378	1

Appendix: Data Analysis

Sample Profile: Respondents

Given that the survey involved a targeted sample (i.e. those who had purchased a clothing-related item second hand/vintage in 2019), the profile of the sample in terms of socio-demographic variables (such as age, gender, etc.) was allowed to fall out naturally. It delivered the following sample profiles.

	US	UK	China
Male	38%	42%	49%
Female	62%	58%	51%
18-34	41%	40%	47%
35-54	41%	43%	46%
55+	18%	17%	7%
Working FT	55%	53%	86%
Working PT	12%	19%	7%
Unemployed	6%	7%	0.4%
Retired	11%	9%	3%
Student	5%	5%	3%
Homemaker	11%	9%	0.2%
Children in home	57%	55%	80%

Sample Profile: Items

The 1,000 survey respondents in each country were asked which items – and how many of each - they had purchased second hand/vintage in 2019. Then, the survey method adopted a convention of focusing in on the most recent four purchases (both to maximise respondent recall about the most recent purchases and also guard against respondent fatigue, i.e. having to answer the survey for e.g. 10 different items). This approach delivers the following numbers of items that were then carried through the survey.

	US	UK	China
All items	3,807	3,653	3,413
Clothing	1,738	1,881	865
Bags/handbags	538	408	769
Shoes/footwear	646	571	731
Other clothing accessories	482	418	466
Jewellery/watches	403	375	582

Survey Questions

Survey Questions

Measuring displacement via second hand/vintage acquisitions.

ASK ALL

Q1. In 2019 so far, have you purchased any of the following second hand, vintage or 'pre-loved' – whether in a store or online? Please include items that you purchased for yourself as well as for someone else. But please don't include items that you acquired for free (i.e. they were passed on to you by friends/family).

1. Clothing
2. Bag/handbag
3. Other clothing accessories (e.g. purse, hat, belt, gloves, scarves)
4. Shoes/footwear
5. Jewellery / Watches
6. I haven't purchased any of these items second hand/vintage in 2019.

ASK IF Q1=1-5. SHOW ONLY THOSE CATEGORIES SELECTED AT Q1.

Q2. You said that you've acquired one or more of the following categories second hand/vintage. Thinking just about 2019 so far, approximately how many items in each category have you acquired second hand or vintage? Once again, please include items for yourself as well as for someone else in the household. SINGLE CODE FOR EACH CATEGORY

1 / 2 / 3 / 4 / 5 / 6 / 7 / 8 / 9 / 10+

IF SUM OF Q2=1 TAKE THIS ITEM FORWARD TO Q4

IF SUM OF Q2=2 TAKE THESE TWO ITEMS FORWARD TO Q4

IF SUM OF Q2=3 TAKE THESE FOUR ITEMS FORWARD TO Q4

IF SUM OF Q2=4 TAKE THESE FOUR ITEMS FORWARD TO Q4

IF SUM OF Q2=5+ ASK Q3 TO ESTABLISH WHICH FOUR TO TAKE FORWARD

Survey Questions (cont.)

ASK IF SUM OF Q2=5+

Q3. These are the items that you said you've acquired second hand/ vintage in 2019 so far. Please select your four most recent purchases.

COLUMNS (UP TO FOUR): ITEM 1; ITEM 2; ITEM 3; ITEM 4. ROWS AS FOLLOWS. SINGLE CODE FOR EACH

1. Clothing
2. Bag/handbag
3. Other clothing accessories (e.g. purse, hat, belt, gloves, scarves)
4. Shoes/footwear
5. Jewellery / Watches

ASK FOR EACH CLOTHING ITEM TAKEN FORWARD

Q4. Of the clothing items that you just mentioned, which of the following best describes the item(s) of clothing? COLUMNS (UP TO

FOUR) = CATEGORY DESCRIPTION (1-5 FROM Q1). ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY

1. Dress/jumpsuit
2. Jacket or blazer
3. Coat
4. Suit
5. Tops & T-shirts
6. Knitwear
7. Shirt/blouse
8. Trousers
9. Skirt
10. Denim jeans or jacket
11. Other item of clothing

Survey Questions (cont.)

ASK FOR EACH ITEM TAKEN FORWARD

Q5. [IF ONLY ONE ITEM]: Thinking of this item, who did you acquire it for? [IF MORE THAN ONE ITEM]: Thinking of these items, who did you acquire each item for? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION [FOR Q1=2-5 THIS WILL ALWAYS BE THE WAY THE CODE IS WRITTEN AT Q1; FOR Q1=1 EXCHANGE 'CLOTHING' FOR THE SPECIFIC ITEM DESCRIPTION AT Q4, EG 'DRESS'] ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY:

1. For myself
2. For a child in the home
3. For someone else in the home (e.g. a partner)
4. For someone else not living in the home (e.g. a friend, family member)

ASK FOR EACH ITEM TAKEN FORWARD

Q6. When in 2019 did you acquire each item? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY:

1. October-November 2019
2. July-September 2019
3. April-June 2019
4. Jan-March 2019

ASK FOR EACH ITEM TAKEN FORWARD

Q7. Did you purchase it in a shop, online or some other way? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY:

1. In a shop
2. Online
3. Some other way (write in)

Survey Questions (cont.)

ASK IF ITEM PURCHASED ONLINE (Q7=2)

Q8a. Which of the following best describes where you purchased these items online? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY:

1. Charity shop website
2. From an online retailer
3. On eBay
4. Social media market places (e.g. Facebook marketplace)
5. Online ads/listings (e.g. Gumtree)
6. Something else (write in)

ASK IF ITEM PURCHASED IN STORE (Q7=1)

Q8b. Which of the following best describes where you purchased these items in store? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY:

1. In a charity shop
2. In a thrift shop
3. In a commercial shop
4. Something else (write in)

Survey Questions (cont.)

ASK FOR EACH ITEM TAKEN FORWARD

Q9. How would you describe the item?

COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY

1. High Street Item (e.g. Topshop, H&M, Asos, Mango, Laura Ashley, Boden, Monsoon, Hollister, Superdry, Fat Face, Zara)
2. Premium item (e.g. All Saints, Whistles, Cos, DKNY, Levi's, Diesel, Calvin Klein, Ralph Lauren, Hobbs, Tommy Hilfiger, Reiss, The North Face)
3. Luxury Fashion Item (e.g. Kenzo, Chloe, Versace, Stella McCartney, Burberry, Missoni, Prada, Gucci, Moschino, Acne Studios, Alexander McQueen, Comme des Garçons)
4. Other (write in)

ASK FOR EACH ITEM TAKEN FORWARD

Q10. How much did you pay for the item? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS.

SINGLE CODE FOR EACH CATEGORY:

1. £0 (i.e. it was free)
2. Less than £10
3. £10-£29
4. £30-£49
5. £50-£74
6. £75-£99
7. £100-£199
8. £200-£299
9. £300-£499
10. £500+`

Survey Questions (cont.)

ASK FOR EACH ITEM TAKEN FORWARD

Q11. Which of the following statements best applies about the item? COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY

1. I set out to buy it second hand/vintage
2. I set out to buy it new but happened to find it second hand/vintage
3. I set out to look into the option of buying it new as well as second hand/vintage
4. It wasn't a planned purchase – I saw the item second hand/vintage and wanted it
5. Other (write in)

ASK WHERE SECOND HAND WAS PLANNED (Q13=1 OR 3).

Q12a. You said that you intended to purchase, or consider purchasing, [this item][these items] second hand/vintage. What was the reason for this? Select up to three. MULTICIDE UP TO THREE

ASK IF 2+ ANSWERS GIVEN AT Q12a

Q12b. And if you had to pick one, what would you say was the main reason?

1. It was a better price
2. The item was last season so the only way to buy it was second hand/vintage
3. To reduce my environmental impact
4. I like finding rare or unusual items second hand/vintage
5. I've had good past experiences of buying second hand/vintage
6. The fact it is vintage adds to the appeal of the product
7. Other (write in)

Survey Questions (cont.)

ASK FOR EACH ITEM TAKEN FORWARD WHEN FOR SOMEONE IN THE HOME (Q5=1-3)

Q14a. Which of the following statements best applies about each of the items?

1. Buying this second hand/vintage purchase prevented the purchase of a new item
2. Buying this second hand/vintage purchase did not prevent the purchase of a new item
3. I'm uncertain/it's difficult to say if buying this second hand/vintage prevented the purchase of a new item

ASK FOR EACH ITEM TAKEN FORWARD WHEN FOR SOMEONE IN THE HOME (Q5=1-3) AND Q14a = 3

Q14b. You said that it's difficult to say if buying this second hand/vintage prevented the purchase of a new item. Which of the following best applies about each of the items?

1. It probably prevented the purchase of a new item, for example I didn't buy a similar item new for quite a while afterwards

2. The second hand/vintage purchase probably did not prevent the purchase of a new item, because I purchased something similar around the same time or quite soon afterwards.

ASK FOR EACH ITEM TAKEN FORWARD WHERE IT IS FOR SOMEONE IN THE HOME (Q5=1-3)

Q15. How many times has the item been worn/used so far?

COLUMNS (UP TO FOUR) = CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE FOR EACH CATEGORY

1. 0 (i.e. it hasn't been worn/used yet)
2. 1-9
3. 10-19
4. 20-49
5. 50-99
6. 100+

Survey Questions (cont.)

ASK FOR EACH ITEM TAKEN FORWARD WHERE IT IS FOR
SOMEONE IN THE HOME (Q5=1-3)

Q16. And how many more times do you think the item will be worn/
used before disposing of them? COLUMNS (UP TO FOUR) =
CATEGORY DESCRIPTION. ROWS AS FOLLOWS. SINGLE CODE
FOR EACH CATEGORY

1. 0 (i.e. it won't be worn/used again)
2. 1-9
3. 10-19
4. 20-49
5. 50-99
6. 100+

ASK ALL

Q17. Overall, how frequently do you purchase clothes for
yourself...? SINGLE CODE. HALF TO SEE SCALE IN REVERSE

Columns:

In-store

Online

Rows:

1. Several times a week
2. About once a week
3. A few times a month
4. About once a month
5. Once every few months
6. Once or twice a year
7. Less than once a year
8. Never

Survey Questions (cont.)

ASK ALL

Q18. How much, on average, would you say you spend on clothes in a typical month? SINGLE CODE. HALF TO SEE SCALE IN REVERSE

1. Less than £10
2. Between £11-£20
3. Between £21-£50
4. Between £51-£100
5. Between £101-£200
6. £201-£300
7. £301-500
8. £501-£1,000
9. More than £1,000

ASK ALL

Q19. In 2019 so far, have you sold or donated any of the following used clothing second hand, vintage or 'pre-loved' - whether in a store or online? Please include items that you wore or used yourself as well as items used by someone else. MULTICODE

1. I have sold used items in 2019
2. I have donated used items in 2019
3. I didn't sell or donate any used items in 2019 so far

Survey Questions (cont.)

ASK ALL

Q20. Thinking now about all the clothes that you currently own. Please estimate a percentage to each of the following to describe how your wardrobe is made-up. Your best estimate is fine. MUST ADD TO 100%

- a) Clothes that were new when you purchased them
- b) Clothes that were 2nd hand/vintage when you acquired them

ASK ALL

Demographic questions .This section included 7 questions on:

- D1. Gender
- D2. Age
- D3. Location in country
- D4. Social grade
- D5. Working status
- D6. Annual household income before tax
- D7. Number of children in the household

Points to note on data in subsequent graphs

1. Respondents are adults 18+ that purchased fashion second hand/vintage in 2019, they are not a nationally representative sample. See slides 16 for details for respondent demographics for each market.
2. Due to rounding some data will not equal 100%.
3. For some questions there were small number of people who selected 'other', due to the %'s being so small, this category has not been included in the graphs.
4. The data presented on each page is based on either the number of respondents or the number of items, bases are explained on every slide in the top copy and in the footer. When the bases includes or excludes certain data this is also noted in the top copy.

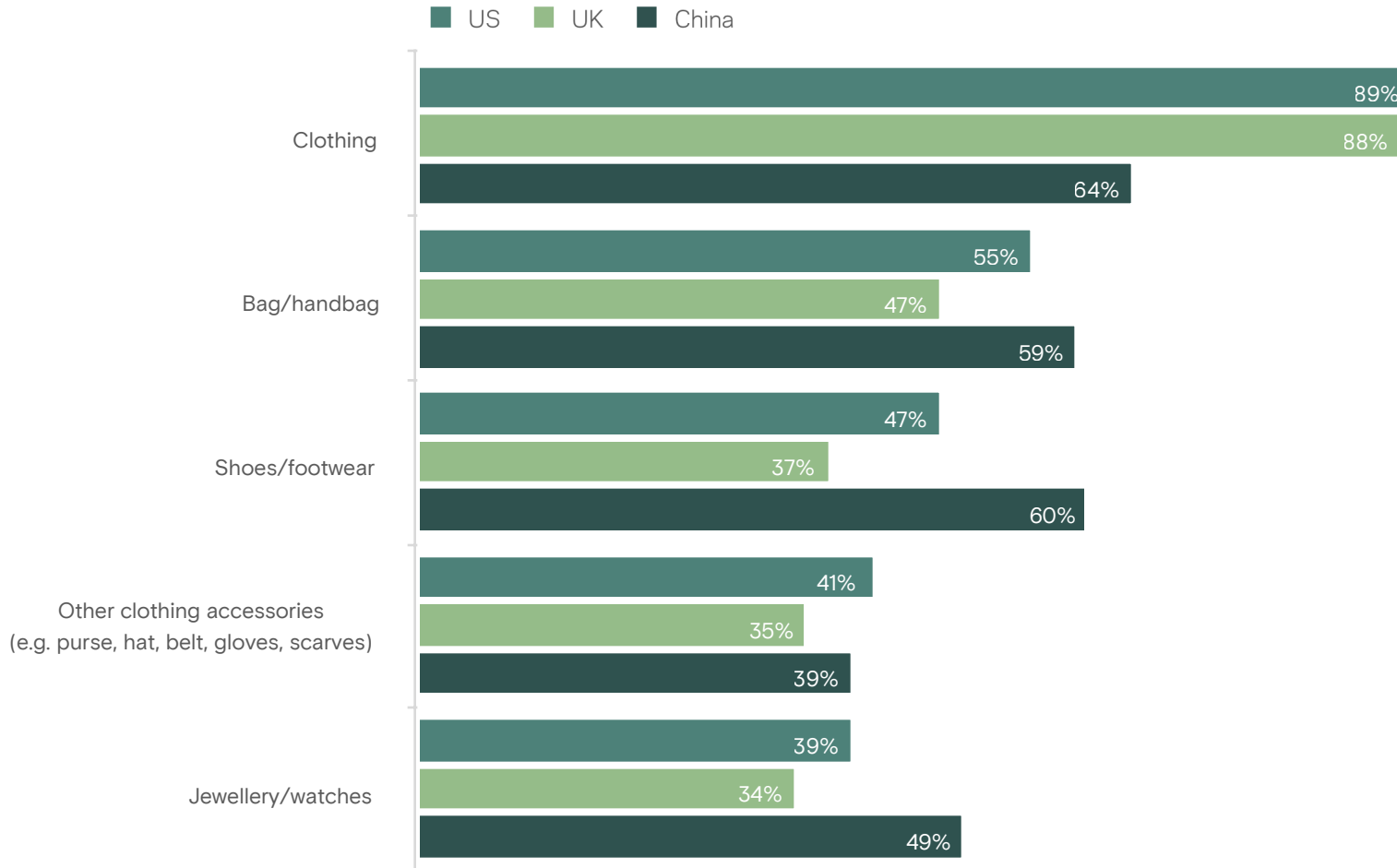
Results

1. Second hand/vintage purchase behaviour

Purchase behaviour – overall

Q1. In 2019 so far, have you purchased any of the following second hand, vintage or 'pre-loved' – whether in a store or online? Please include items that you purchased for yourself as well as for someone else, but don't include items that you acquired free (i.e. passed on to you by friends/family).

BASE = CONSUMERS. E.G. 89% OF US CONSUMERS IN THE SAMPLE PURCHASED 1+ CLOTHING ITEMS IN 2019.



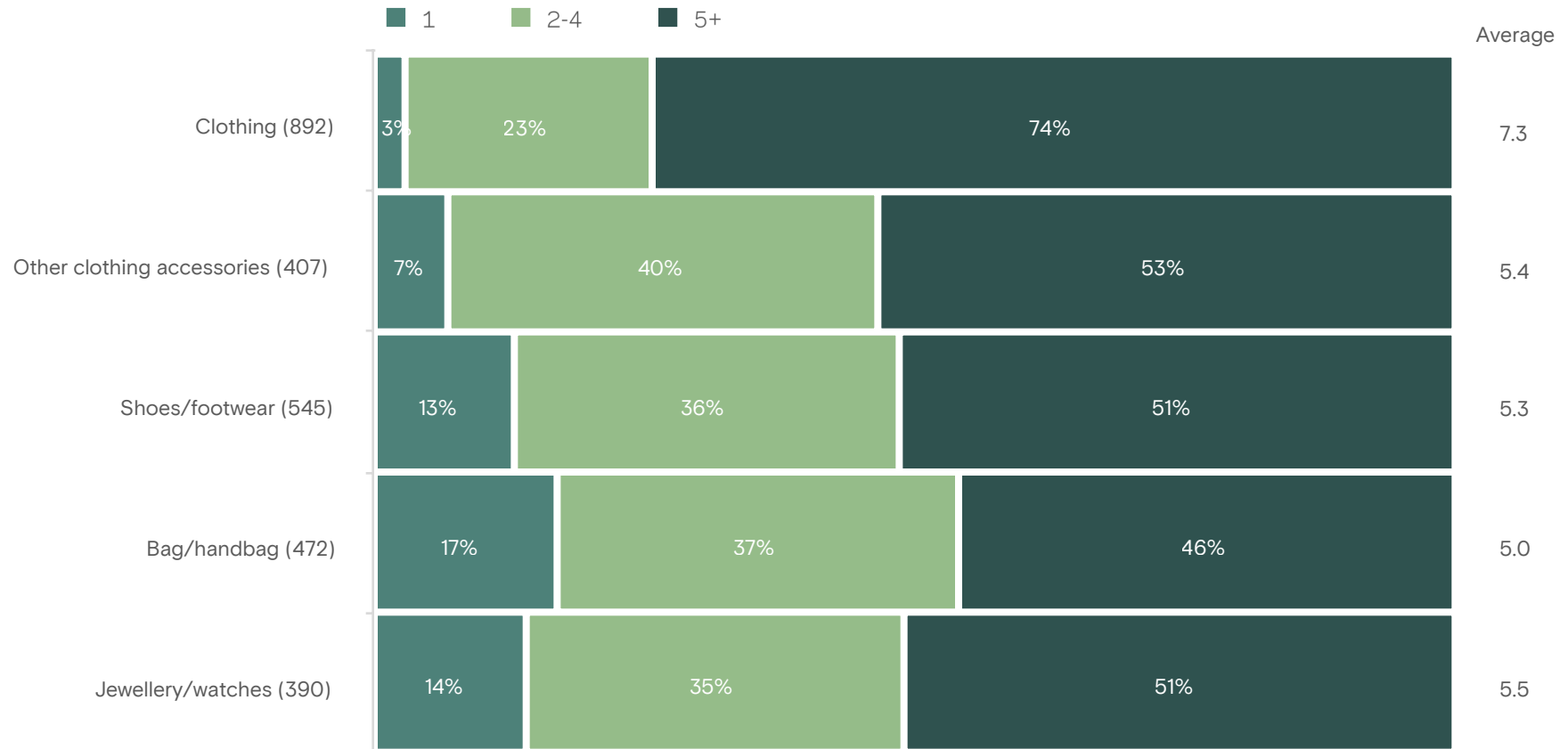
2. The number of items purchased second hand/vintage

Number of items acquired - US

Q2. You said that you've purchased one or more of the following categories second hand/vintage. Thinking just about 2019 so far, approximately how many items in each category have you purchased second hand or vintage. Once again, please include items for yourself as well as for someone else in the household.

BASE = CONSUMERS, E.G. OF THOSE 892 US CONSUMERS IN THE SAMPLE WHO HAVE PURCHASED CLOTHING SECOND HAND/VINTAGE IN 2019, 74% HAVE PURCHASED 5+ ITEMS.

NB: For total number of second hand/vintage items purchased in 2019, if respondents selected 10+ it was assumed they purchased 12.



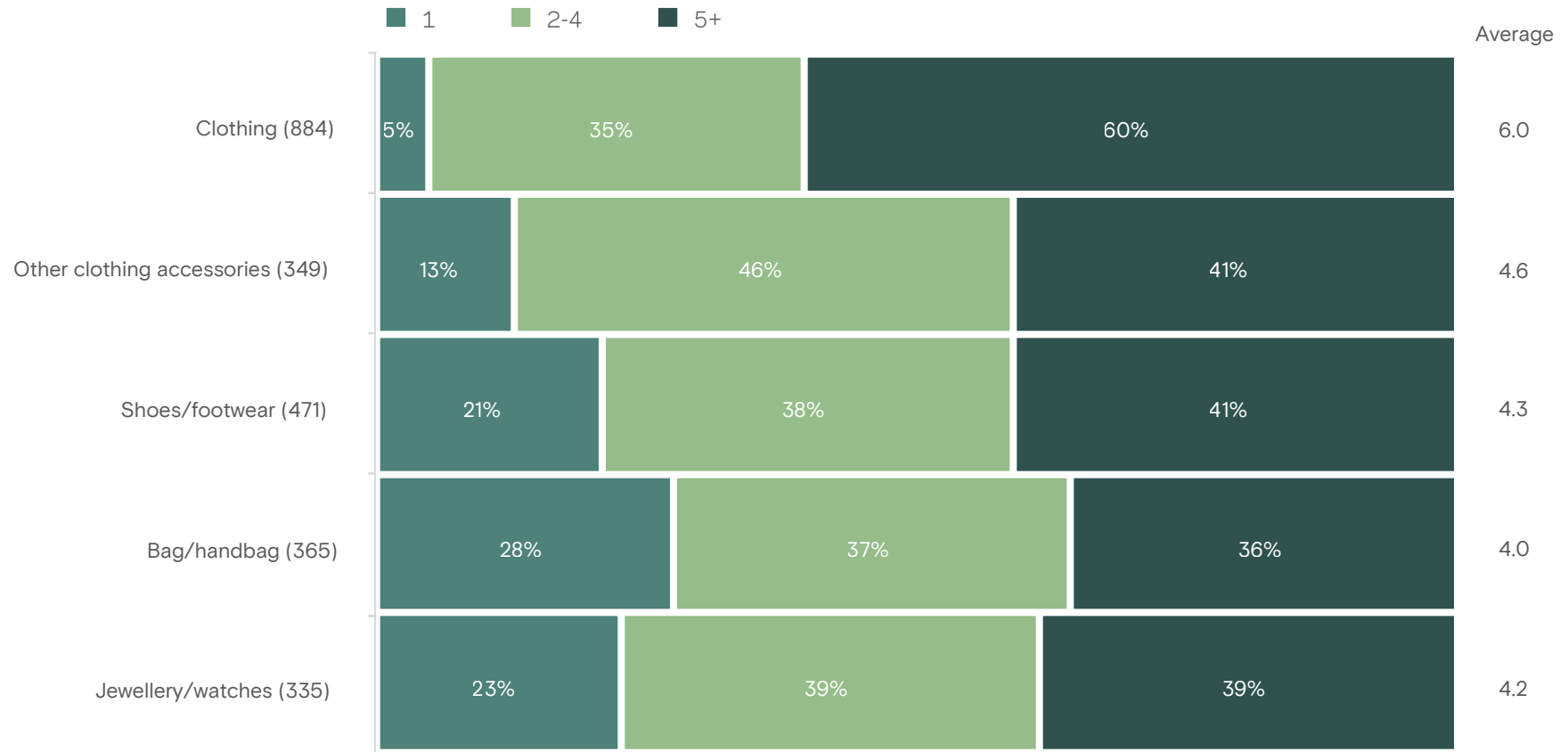
Base: Respondents who have purchased each category second hand/vintage in the US (bases in brackets)

Number of items acquired – UK

Q2. You said that you've purchased one or more of the following categories second hand/vintage. Thinking just about 2019 so far, approximately how many items in each category have you purchased second hand or vintage. Once again, please include items for yourself as well as for someone else in the household.

BASE = CONSUMERS, E.G. OF THOSE 884 UK CONSUMERS IN THE SAMPLE WHO HAVE PURCHASED CLOTHING SECOND HAND/VINTAGE IN 2019, 60% HAVE PURCHASED 5+ ITEMS.

NB: For total number of second hand/vintage items purchased in 2019, if respondents selected 10+ it was assumed they purchased 12.



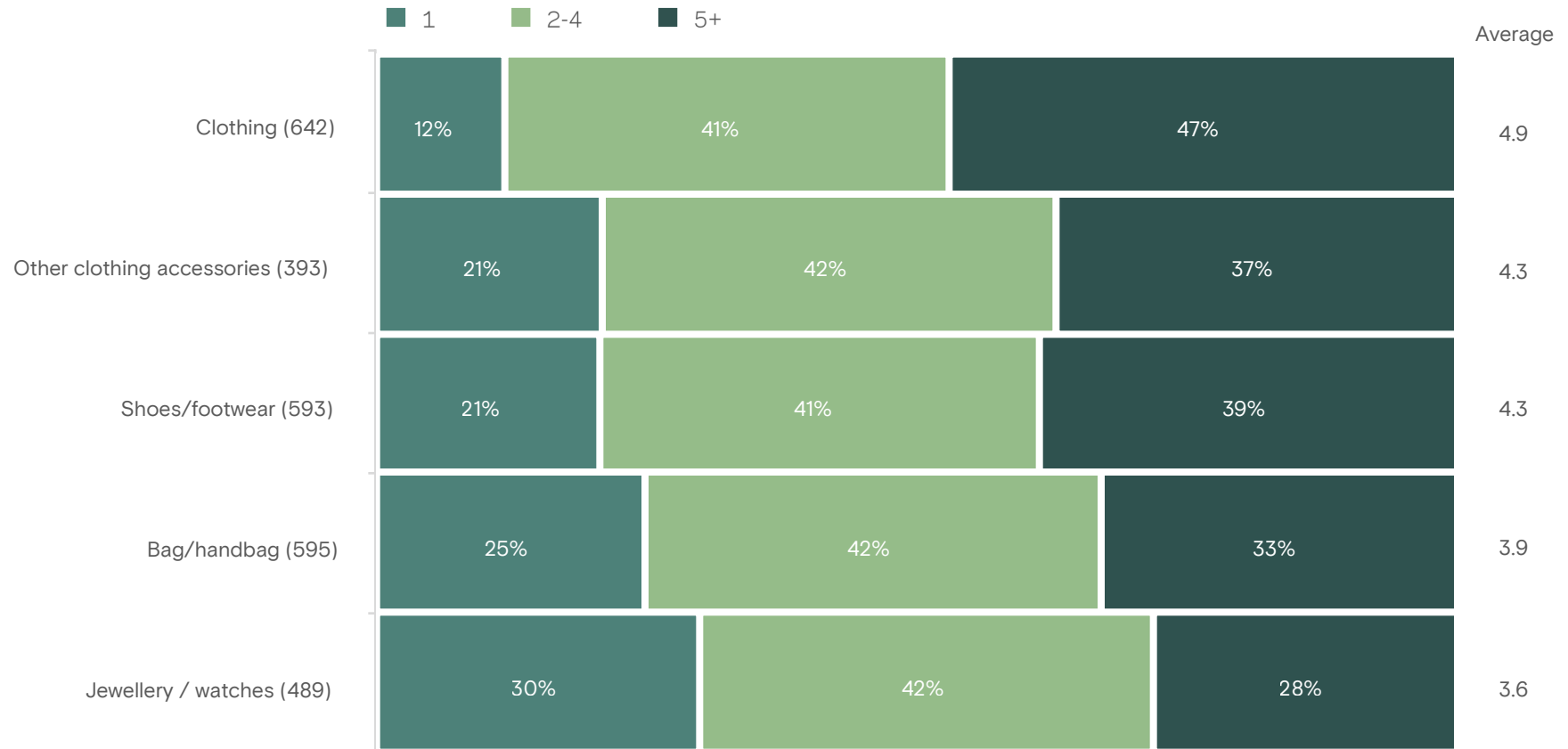
Base: Respondents who have purchased each category second hand/vintage in the UK (bases in brackets)

Number of items acquired - China

Q2. You said that you've purchased one or more of the following categories second hand/vintage. Thinking just about 2019 so far, approximately how many items in each category have you purchased second hand or vintage. Once again, please include items for yourself as well as for someone else in the household.

BASE = CONSUMERS, E.G. OF THOSE 642 CHINESE CONSUMERS IN THE SAMPLE WHO HAVE PURCHASED CLOTHING SECOND HAND/VINTAGE IN 2019, 47% HAVE PURCHASED 5+ ITEMS.

NB: For total number of second hand/vintage items purchased in 2019, if respondents selected 10+ it was assumed they purchased 12.



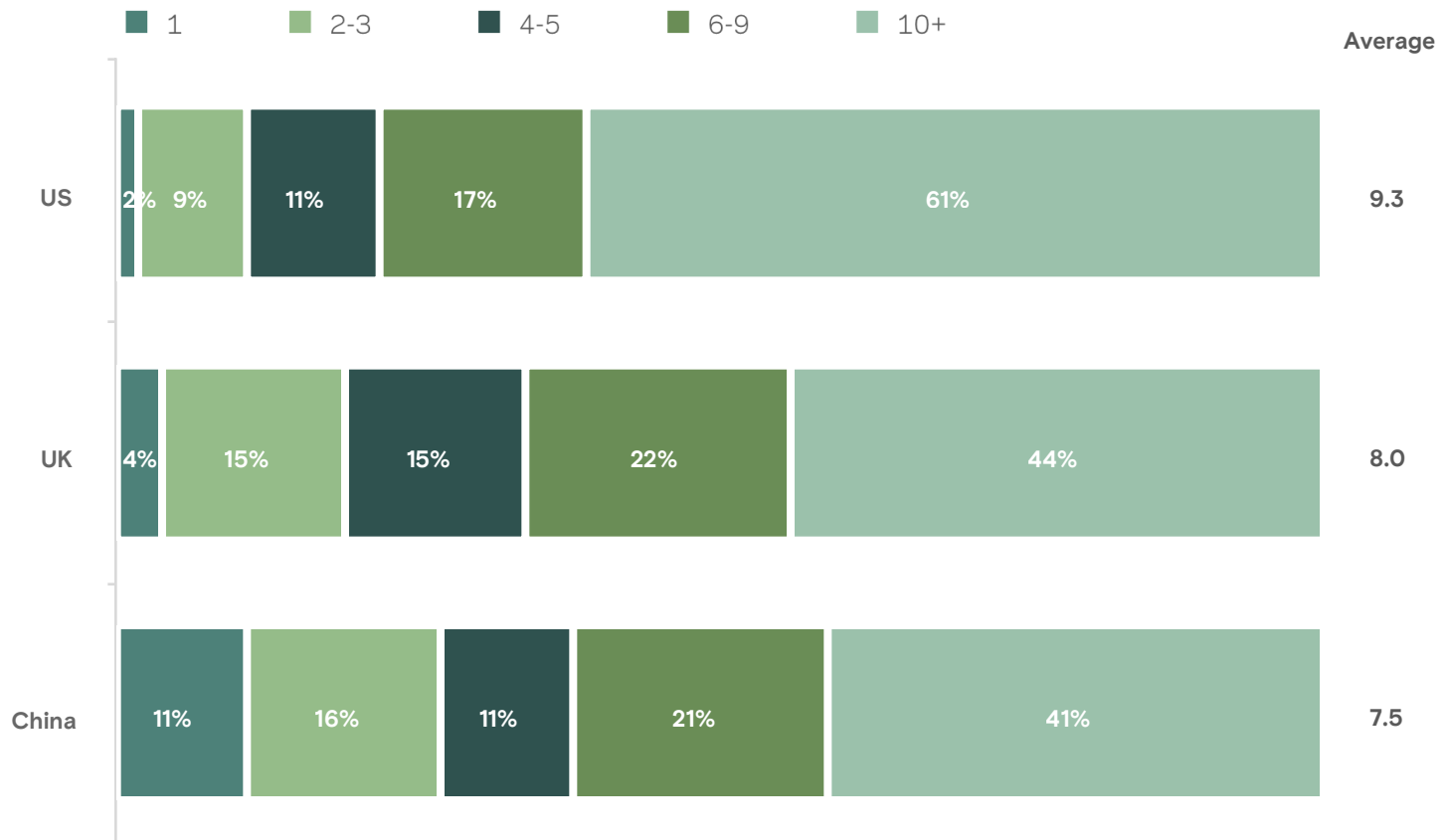
Base: Respondents who have purchased each category second hand/vintage in China (bases in brackets)

Number of items acquired – overall

Q2. You said that you've purchased one or more of the following categories second hand/vintage. Thinking just about 2019 so far, approximately how many items in each category have you purchased second hand or vintage. Once again, please include items for yourself as well as for someone else in the household.

BASE = CONSUMERS, E.G. 61% OF US CONSUMERS WHO HAVE PURCHASED ITEMS SECOND HAND/VINTAGE IN 2019 HAVE PURCHASED 10+ ITEMS.

NB: For total number of second hand/vintage items purchased in 2019, if respondents selected 10+ it was assumed they purchased 12.

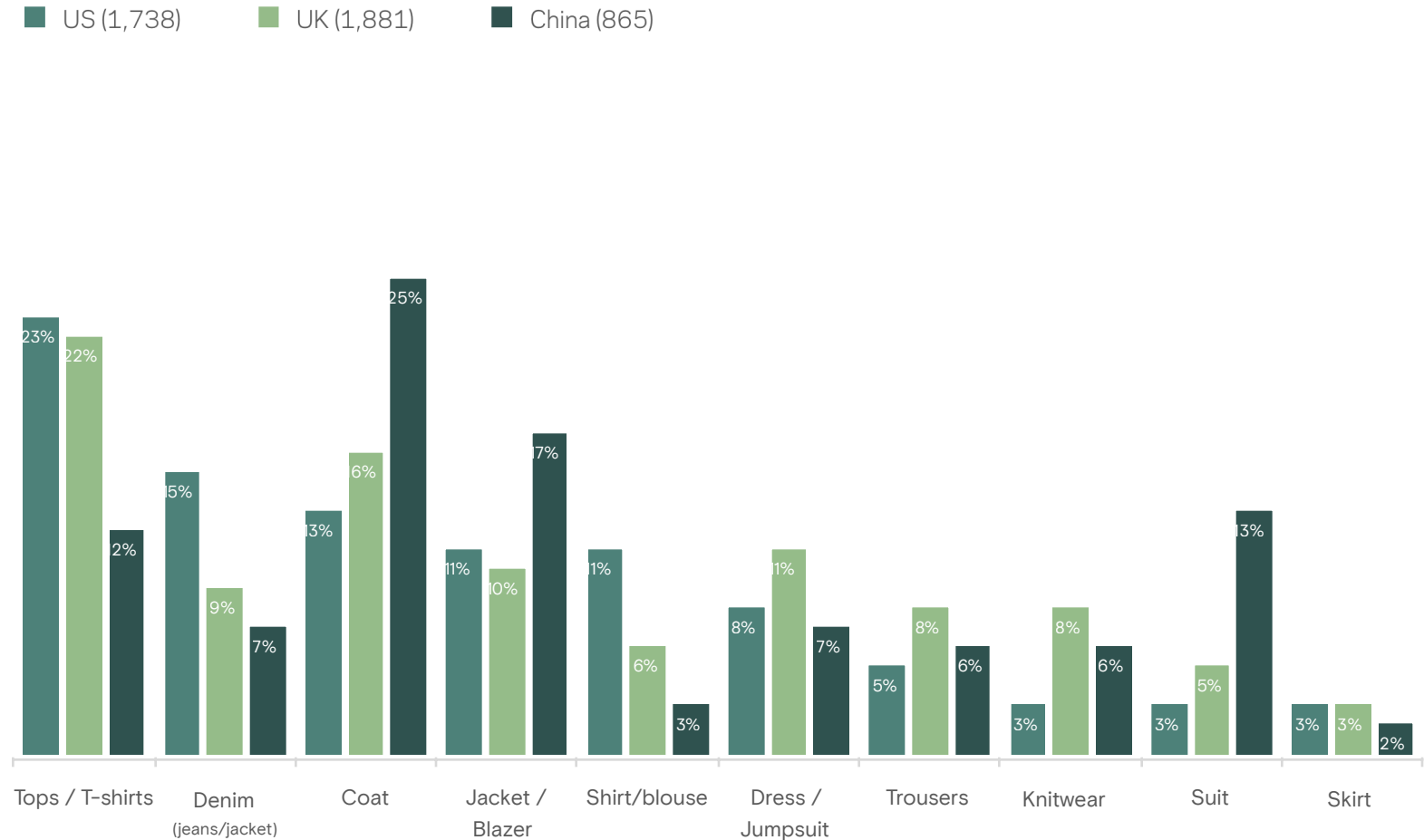


**Up to 4 of the most recent purchases
were taken forward for the remaining
questions.**

Types of clothing

Q4. And which of the following best describes the item of clothing?

BASE = ITEMS. E.G. OF ALL CLOTHING ITEMS PURCHASE SECOND HAND/VINTAGE IN THE US IN 2019, 23% WERE TOPS / T-SHIRTS.



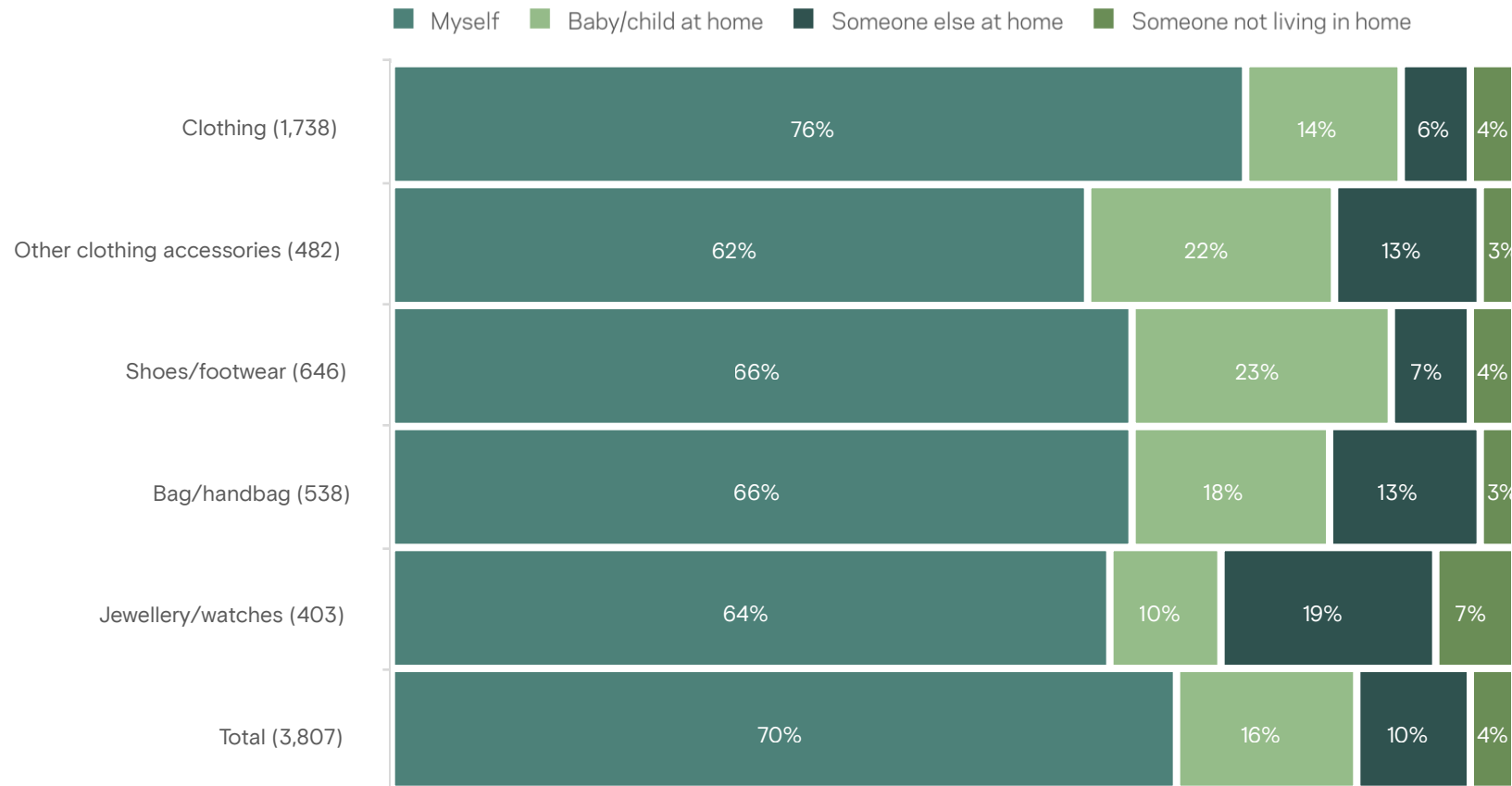
Base: Clothing items acquired second hand/vintage (bases in brackets)

3. Auditing the second hand/vintage purchases – who for, where purchased, when, how much

Who the items were acquired for – US

Q5. Who did you acquire each item for?

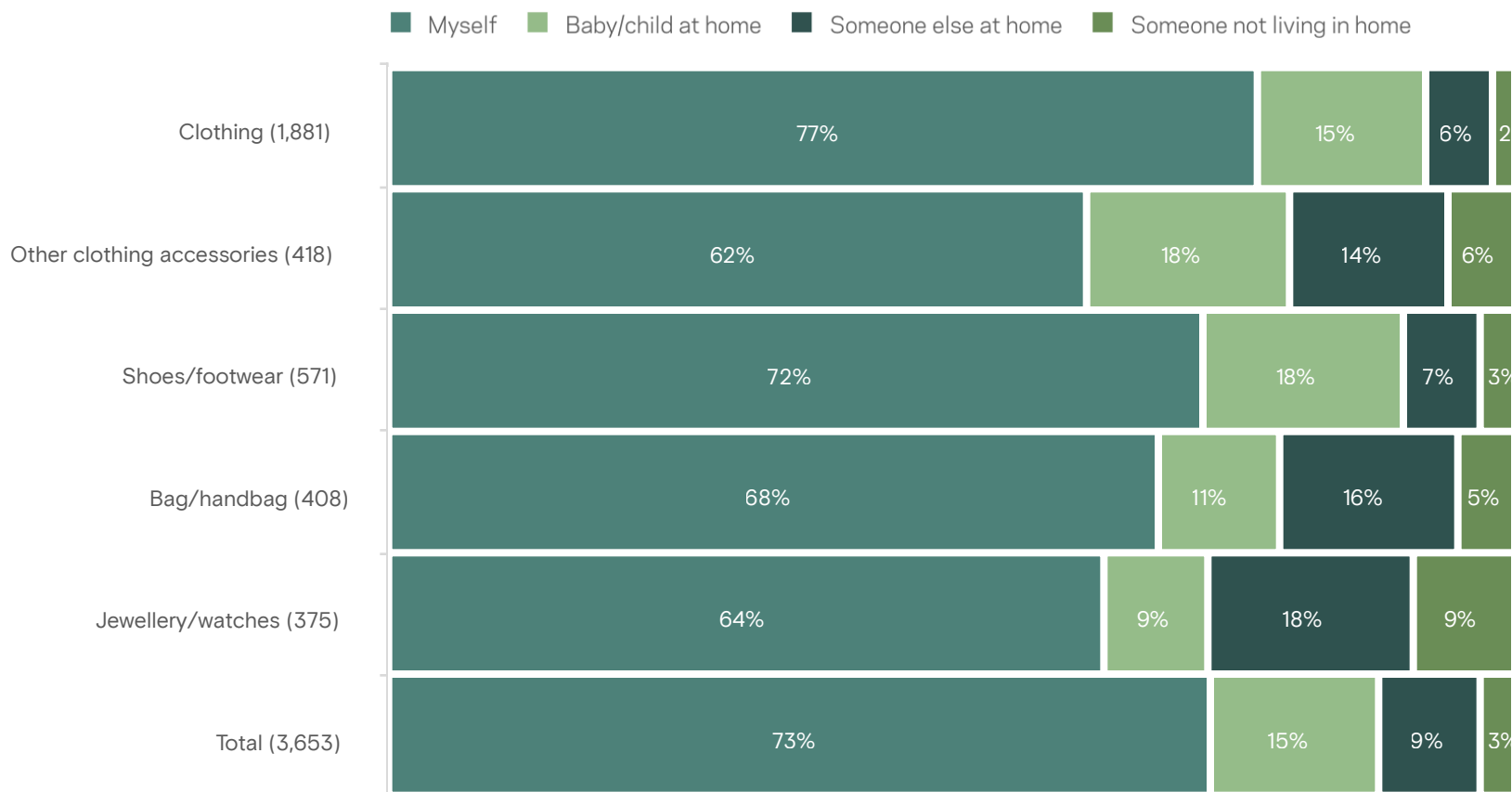
BASE = ITEMS. E.G. 16% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE PURCHASED FOR A BABY/CHILD AT HOME.



Who the items were acquired for – UK

Q5. Who did you acquire each item for?

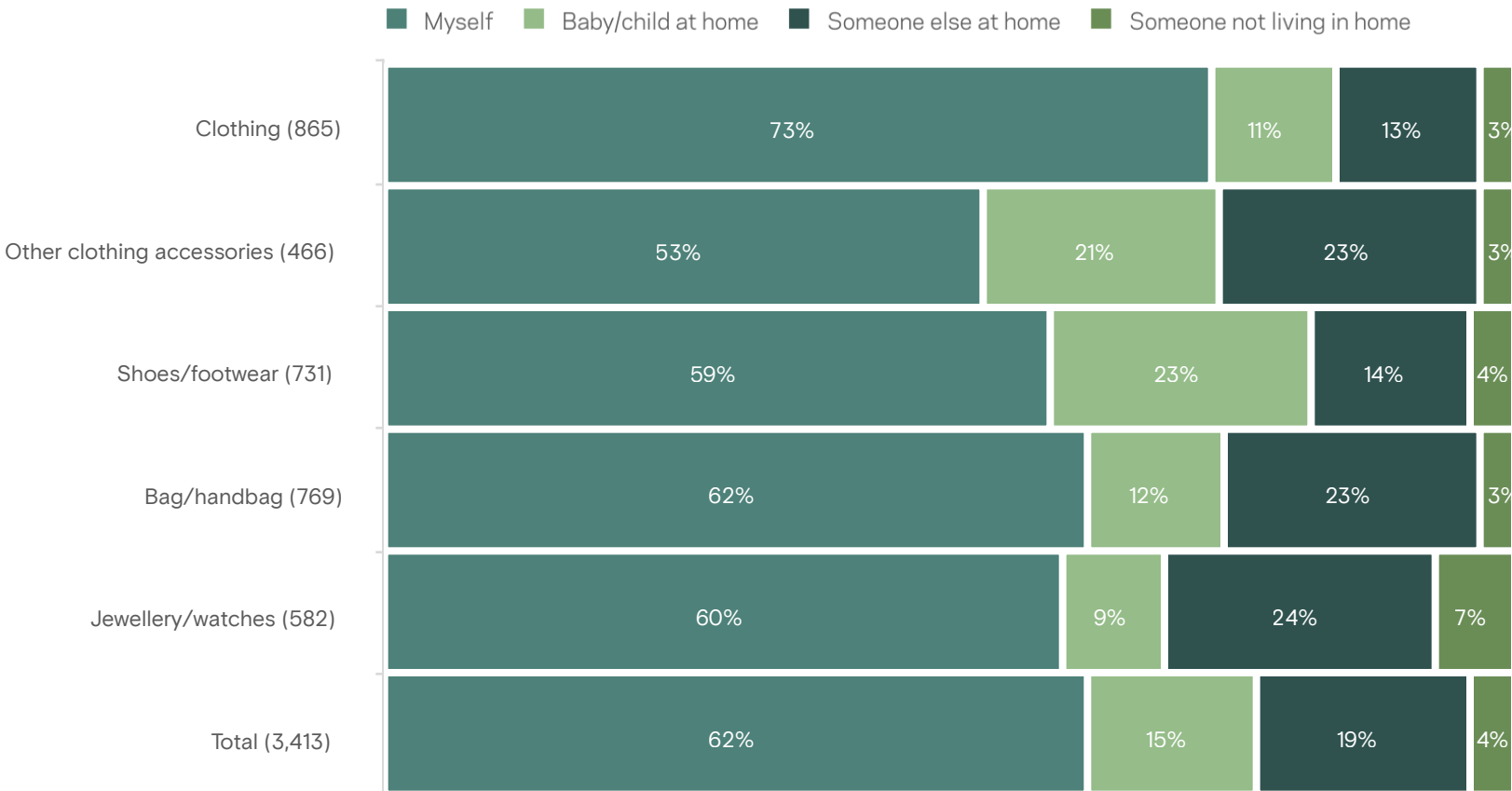
BASE = ITEMS. E.G. 15% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 WERE PURCHASED FOR A BABY/CHILD AT HOME.



Who the items were acquired for – China

Q5. Who did you acquire each item for?

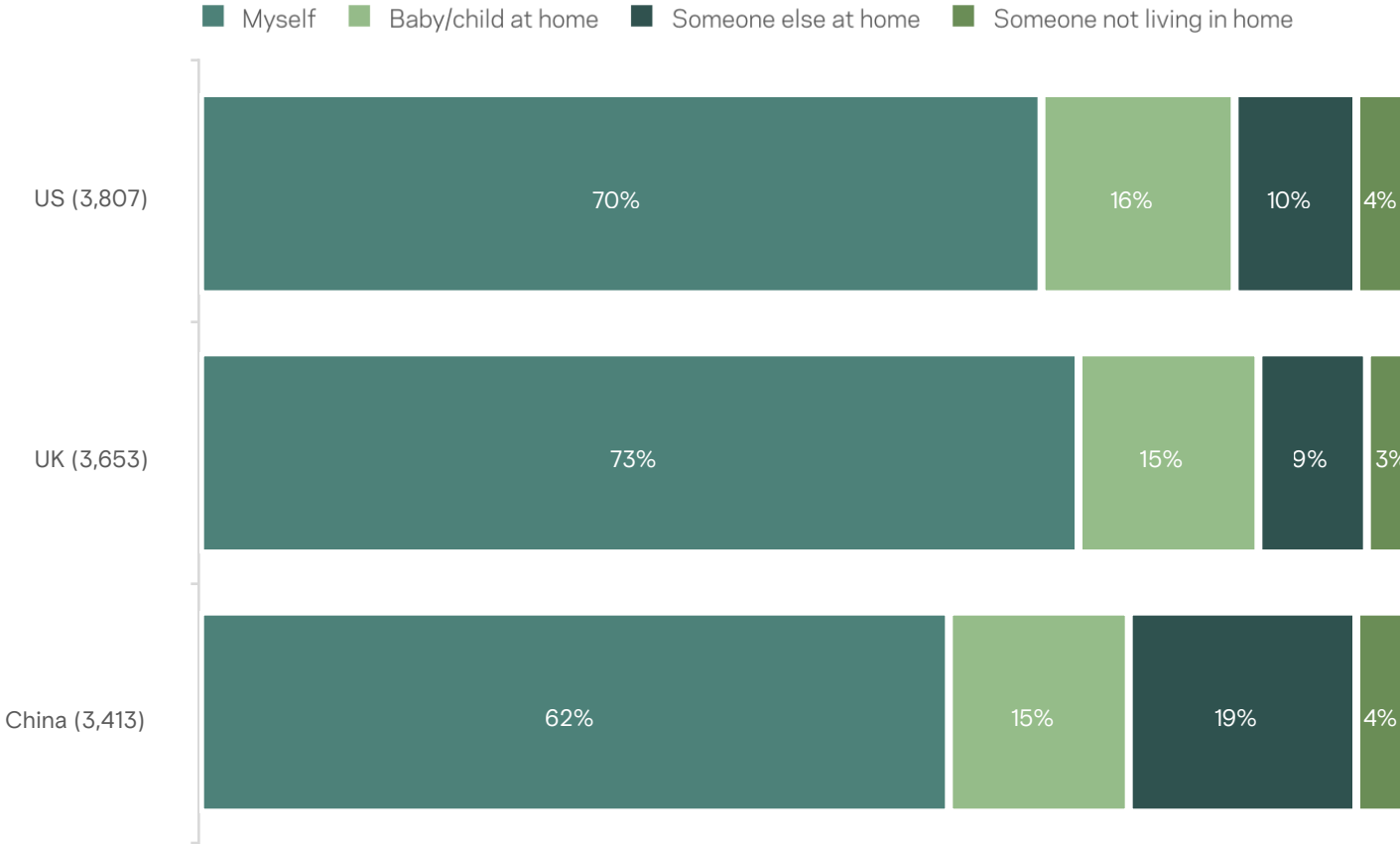
BASE = ITEMS. E.G. 15% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 WERE PURCHASED FOR A BABY/CHILD AT HOME.



Who the items were acquired for – overall

Q5. Who did you acquire each item for?

BASE = ITEMS. E.G. 16% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE PURCHASED FOR A BABY/CHILD AT HOME.

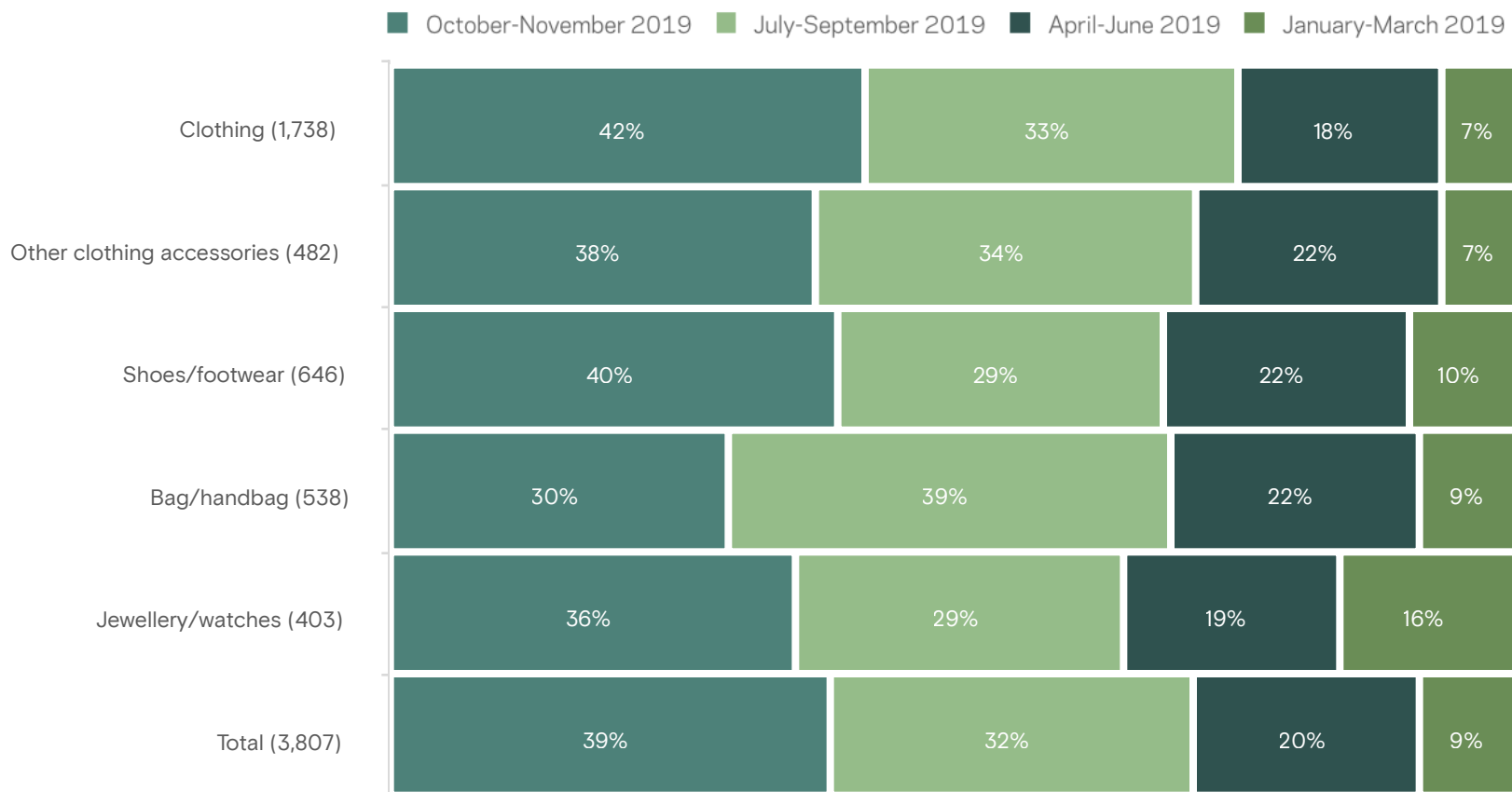


Base: Items purchased second hand/vintage (bases in brackets)

When the items were acquired – US

Q6. When did you acquire each item?

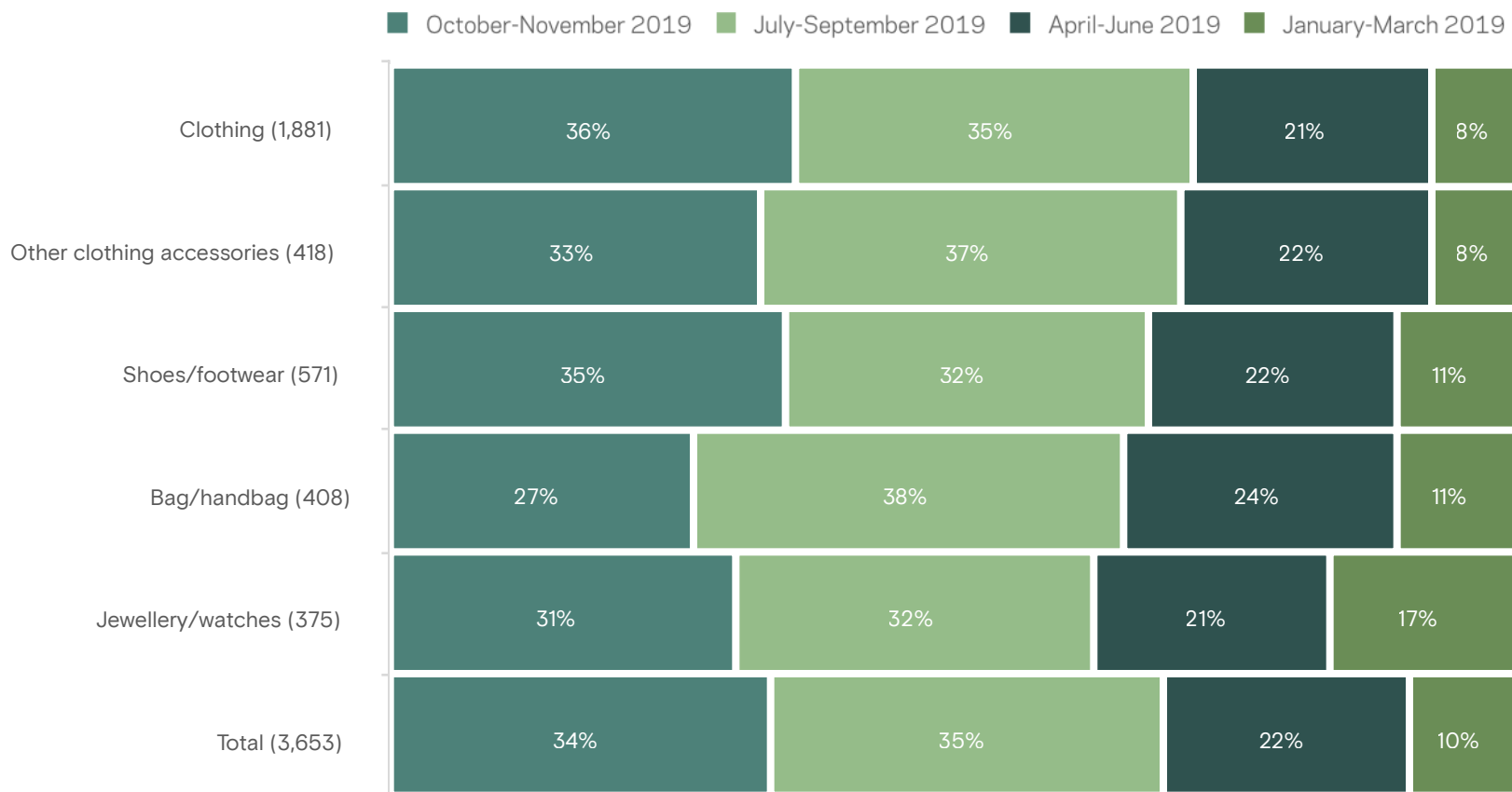
BASE = ITEMS. E.G. 39% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE DONE SO IN OCTOBER-NOVEMBER 2019.



When the items were acquired – UK

Q6. When did you acquire each item?

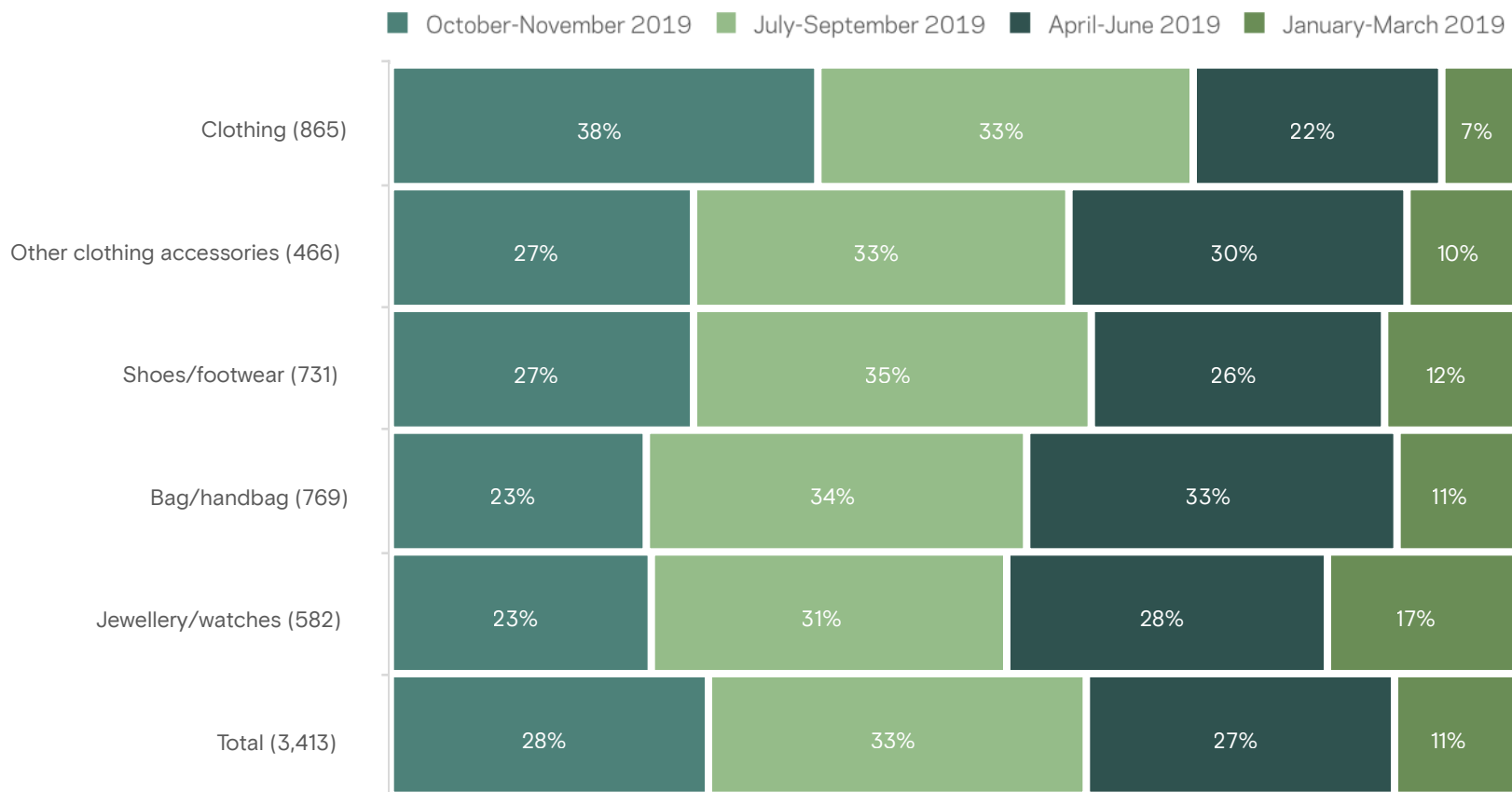
BASE = ITEMS. E.G. 34% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 WERE DONE SO IN OCTOBER-NOVEMBER 2019.



When the items were acquired – China

Q6. When did you acquire each item?

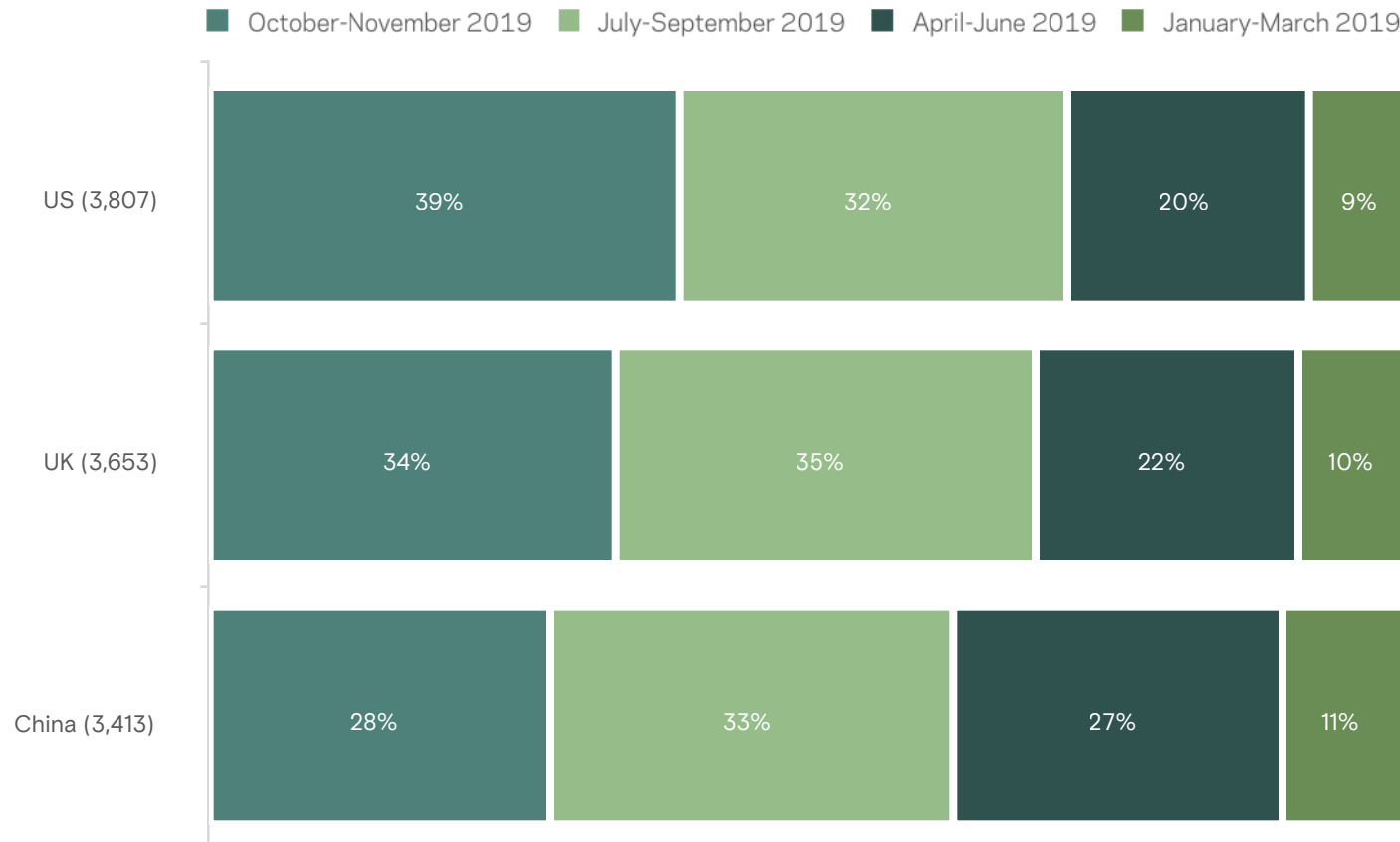
BASE = ITEMS. E.G. 28% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 WERE DONE SO IN OCTOBER-NOVEMBER 2019.



When the items were acquired – overall

Q6. When did you acquire each item?

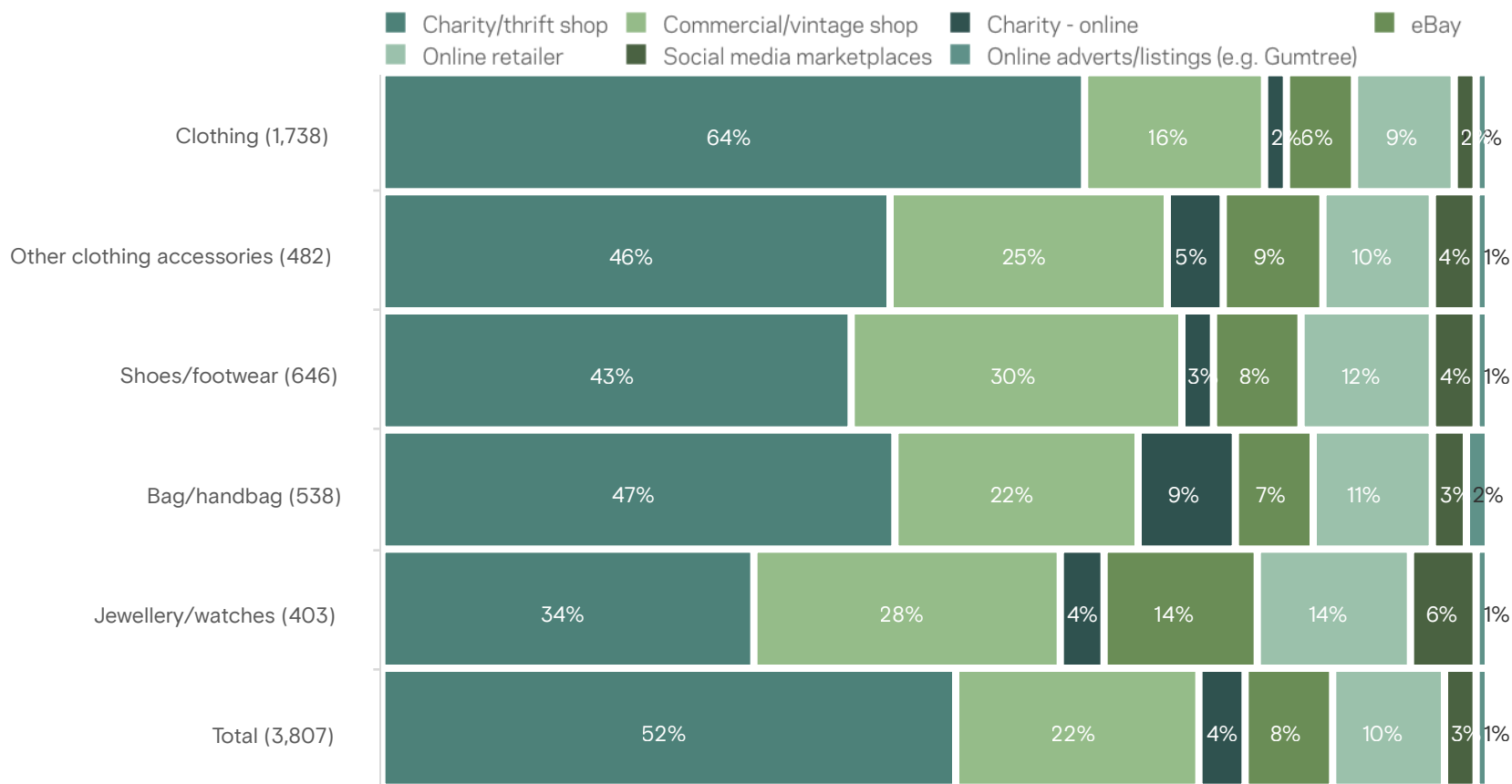
BASE = ITEMS. E.G. 39% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE DONE SO IN OCTOBER-NOVEMBER 2019.



Where the items were acquired - US

Q7/8a/8b. Which of the following best describes where you purchased these items?

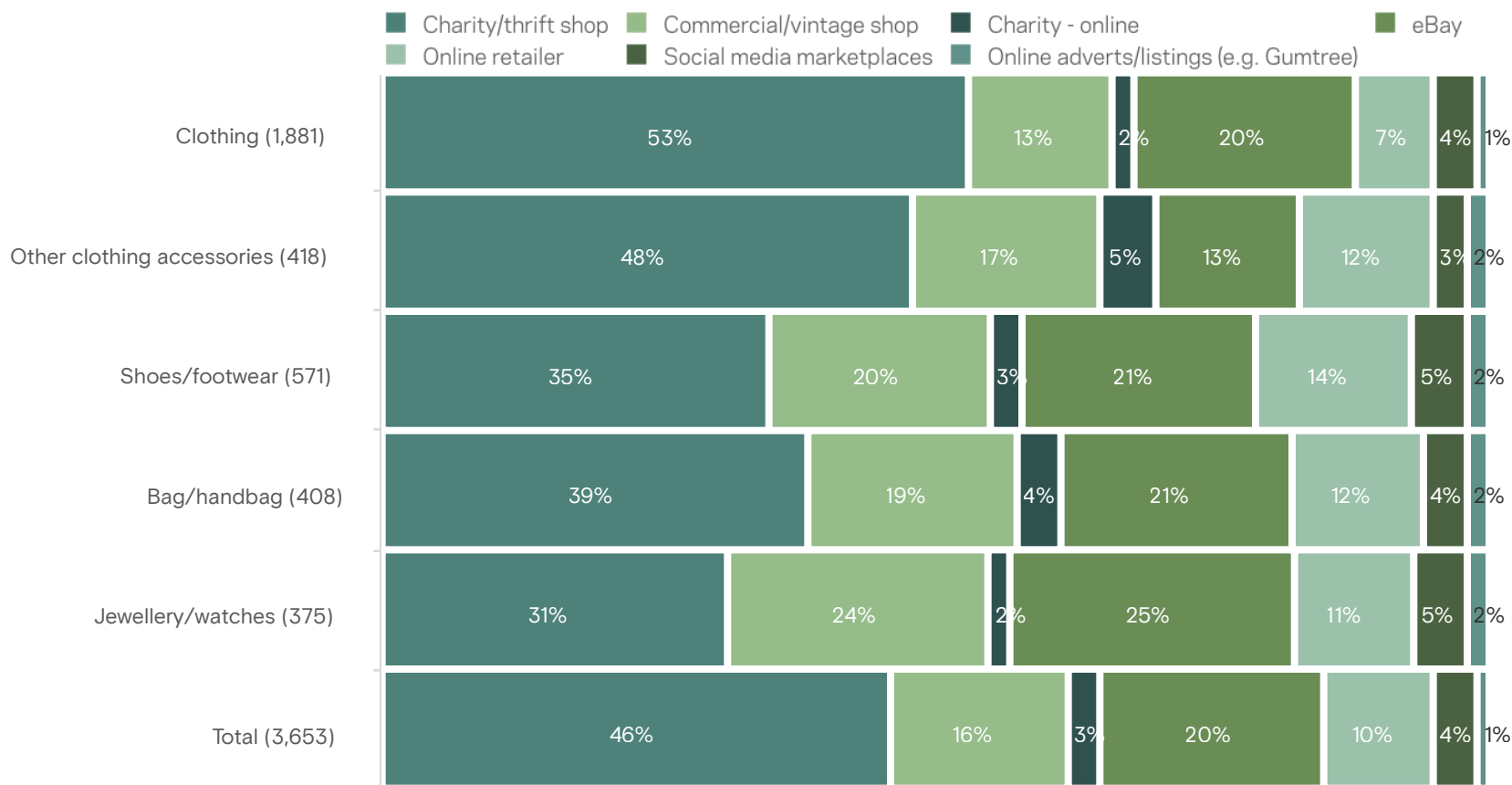
BASE = ITEMS. E.G. 22% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE PURCHASED IN A COMMERCIAL/VINTAGE SHOP.



Where the items were acquired – UK

Q7/8a/8b. Which of the following best describes where you purchased these items?

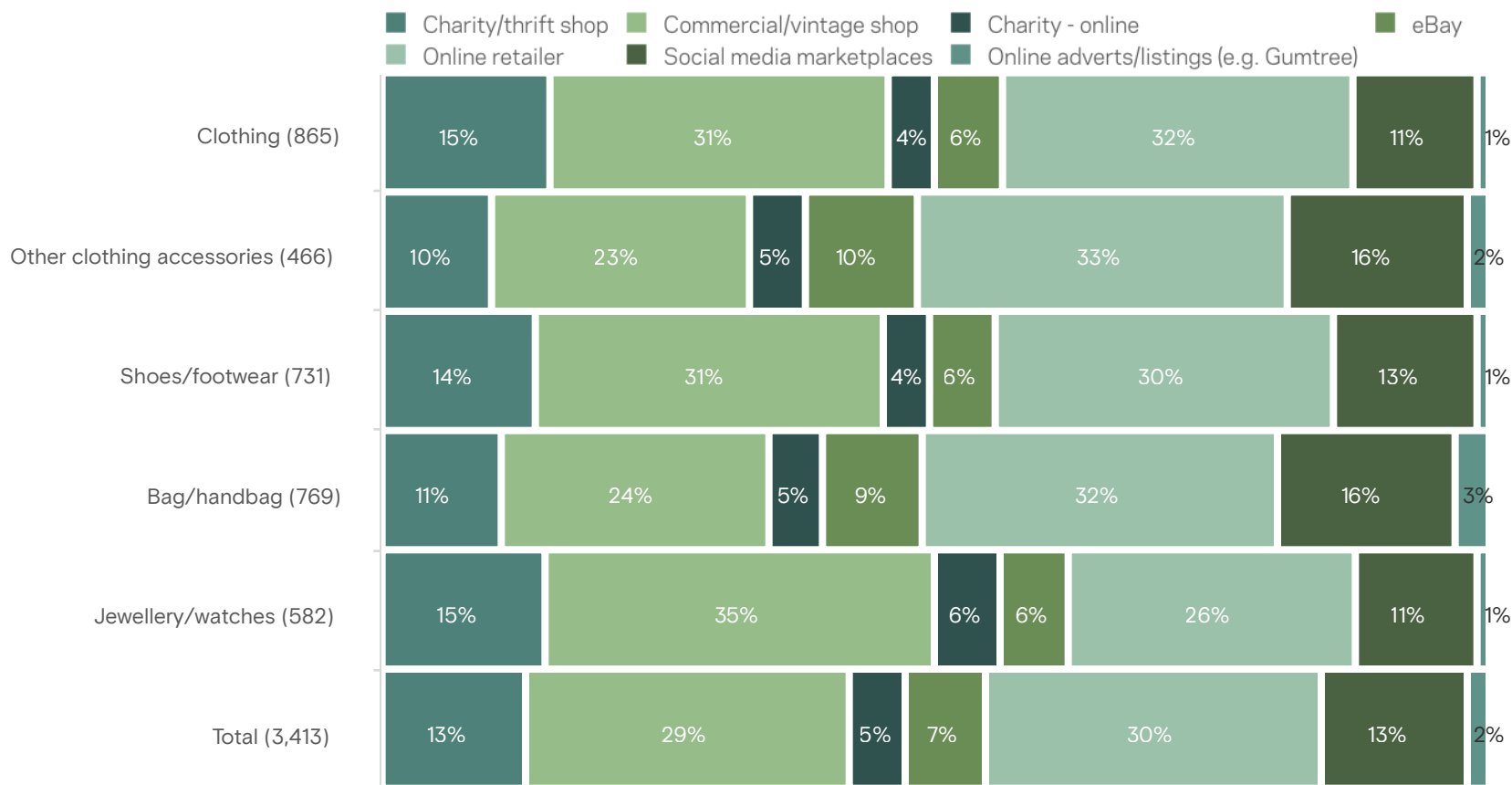
BASE = ITEMS. E.G. 16% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 WERE PURCHASED IN A COMMERCIAL/VINTAGE SHOP.



Where the items were acquired - China

Q7/8a/8b. Which of the following best describes where you purchased these items?

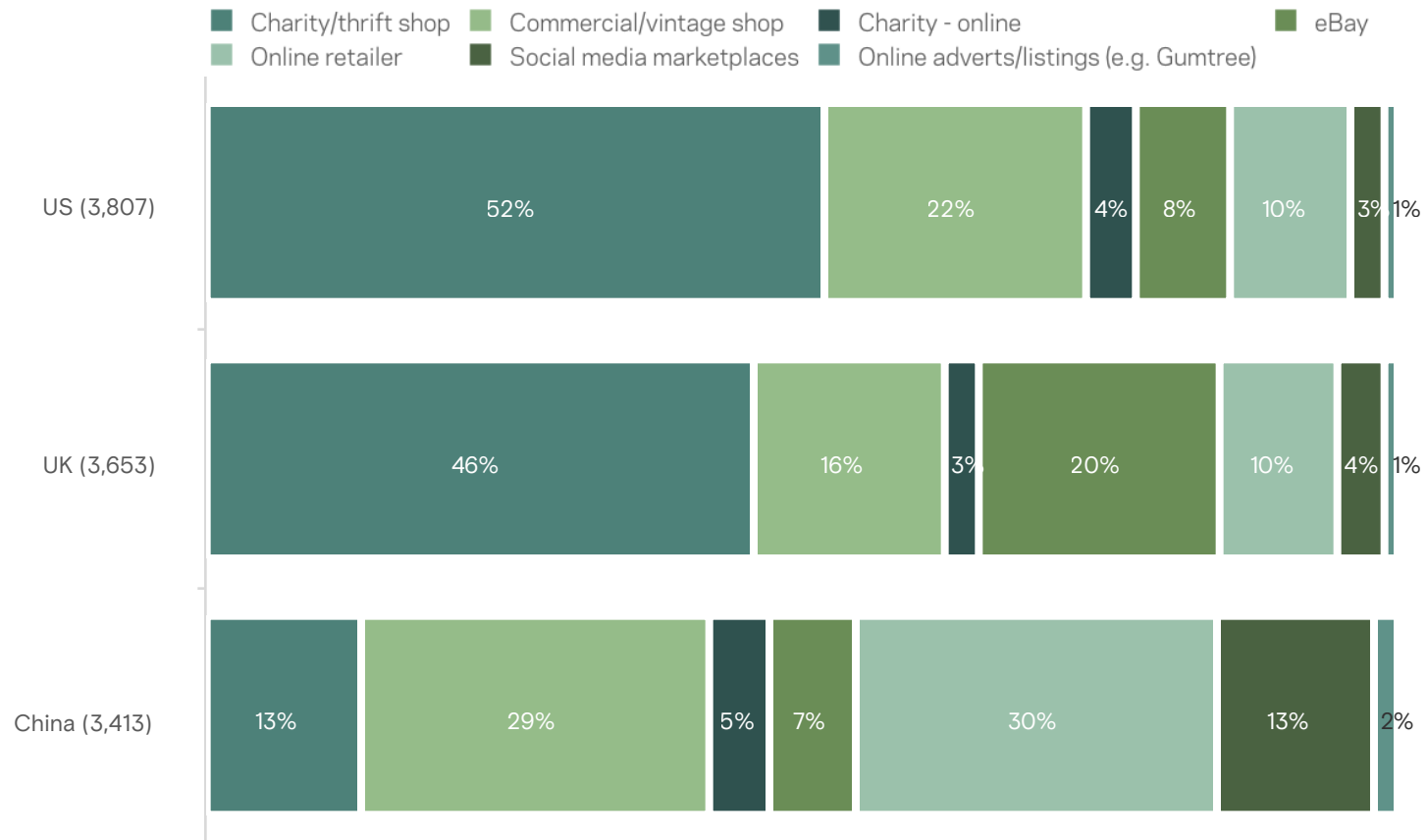
BASE = ITEMS. E.G. 29% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 WERE PURCHASED IN A COMMERCIAL/VINTAGE SHOP.



Where the items were acquired – overall

Q7/8a/8b. Which of the following best describes where you purchased these items?

BASE = ITEMS. E.G. 22% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE PURCHASED IN A COMMERCIAL/VINTAGE SHOP.

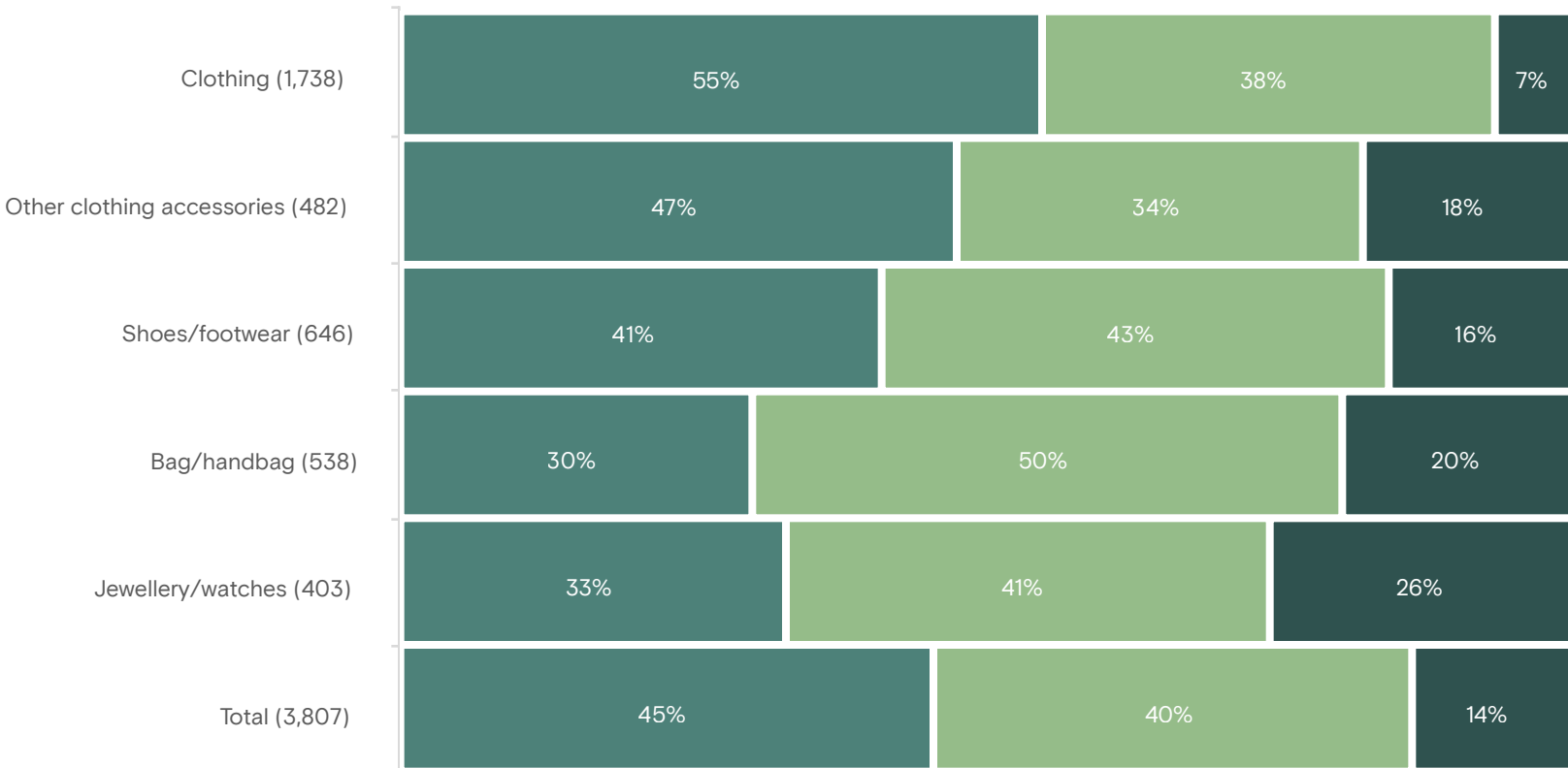


Classification of the item - US

Q9. How would you describe the item?

BASE = ITEMS, E.G. 45% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 ARE DESCRIBED AS A HIGH STREET ITEM.

- High Street Item (e.g. Topshop, H&M, Asos, Mango, Laura Ashley, Boden, Monsoon, Hollister, Superdry, Fat Face, Zara)
- Premium item (e.g. All Saints, Whistles, Cos, DKNY, Levi's, Diesel, Calvin Klein, Ralph Lauren, Hobbs, Tommy Hilfiger, Reiss, The North Face)
- Luxury Fashion Item (e.g. Kenzo, Chloe, Versace, Stella McCartney, Burberry, Missoni, Prada, Gucci, Moschino, Acne Studios, Alexander McQueen, Comme des Garçons)

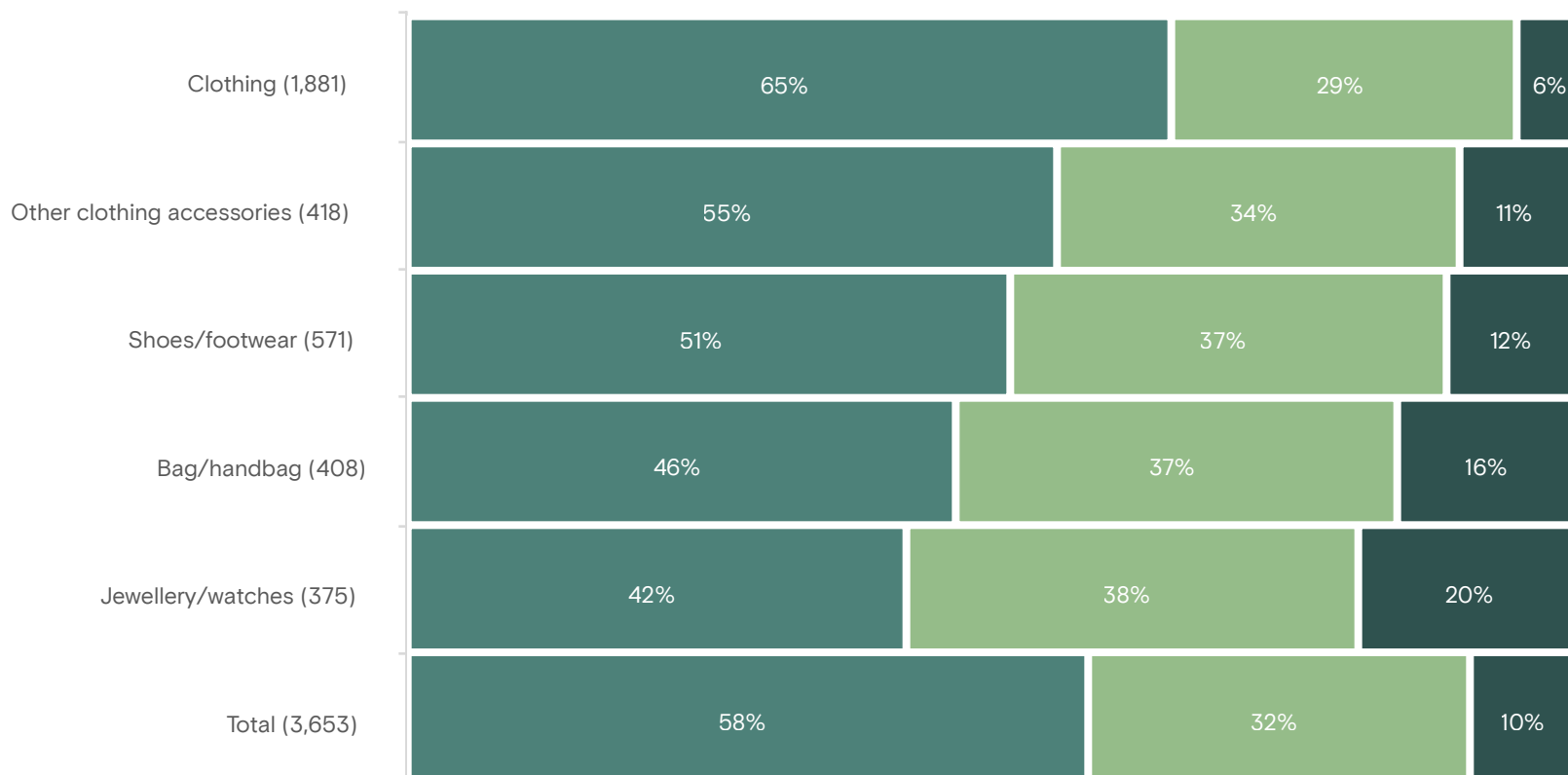


Classification of the item - UK

Q9. How would you describe the item?

BASE = ITEMS, E.G. 58% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 ARE DESCRIBED AS A HIGH STREET ITEM.

- High Street Item (e.g. Topshop, H&M, Asos, Mango, Laura Ashley, Boden, Monsoon, Hollister, Superdry, Fat Face, Zara)
- Premium item (e.g. All Saints, Whistles, Cos, DKNY, Levi's, Diesel, Calvin Klein, Ralph Lauren, Hobbs, Tommy Hilfiger, Reiss, The North Face)
- Luxury Fashion Item (e.g. Kenzo, Chloe, Versace, Stella McCartney, Burberry, Missoni, Prada, Gucci, Moschino, Acne Studios, Alexander McQueen, Comme des Garçons)

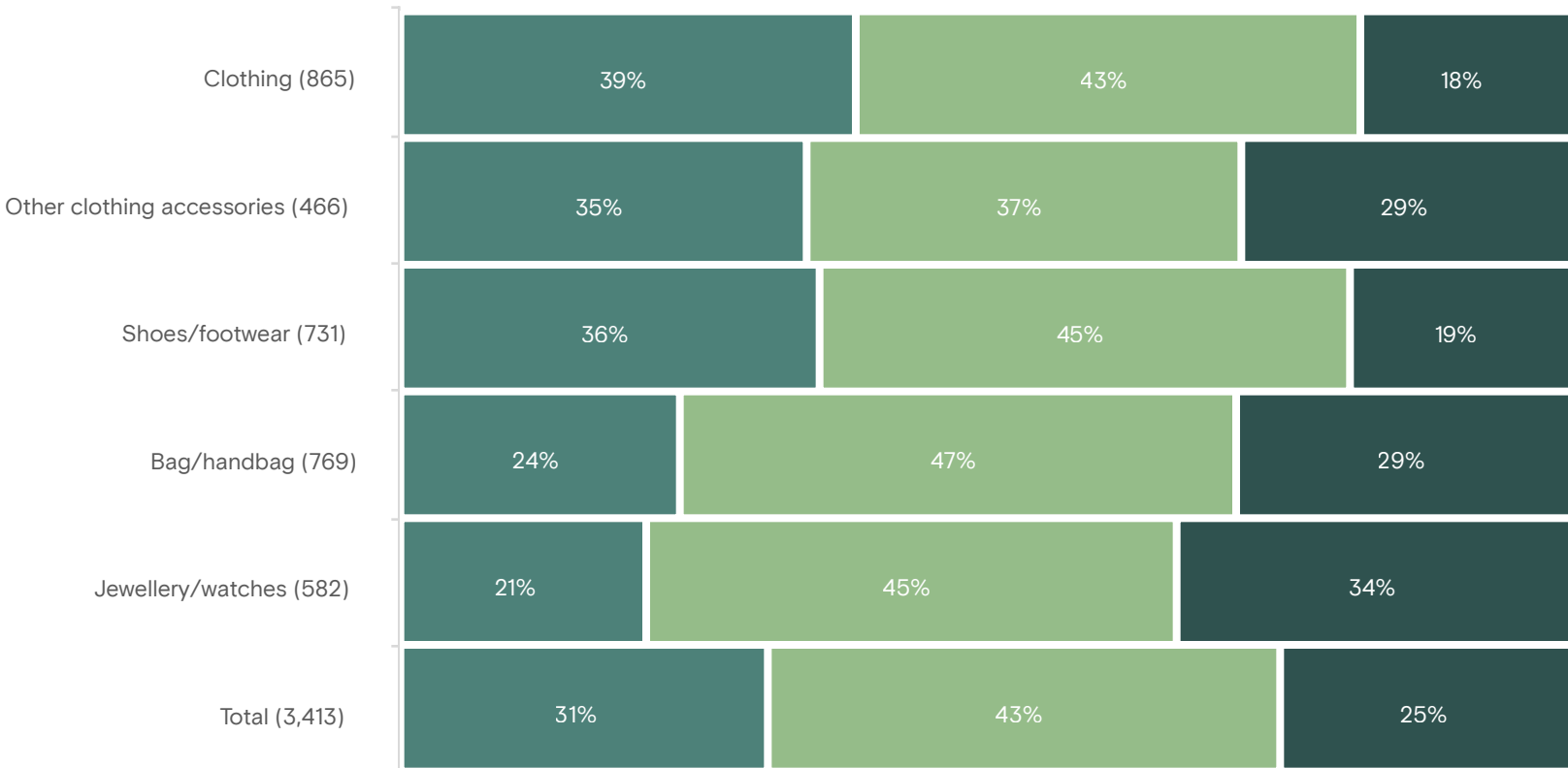


Classification of the item - China

Q9. How would you describe the item?

BASE = ITEMS, E.G. 31% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 ARE DESCRIBED AS A HIGH STREET ITEM.

- High Street Item (e.g. Topshop, H&M, Asos, Mango, Laura Ashley, Boden, Monsoon, Hollister, Superdry, Fat Face, Zara)
- Premium item (e.g. All Saints, Whistles, Cos, DKNY, Levi's, Diesel, Calvin Klein, Ralph Lauren, Hobbs, Tommy Hilfiger, Reiss, The North Face)
- Luxury Fashion Item (e.g. Kenzo, Chloe, Versace, Stella McCartney, Burberry, Missoni, Prada, Gucci, Moschino, Acne Studios, Alexander McQueen, Comme des Garçons)

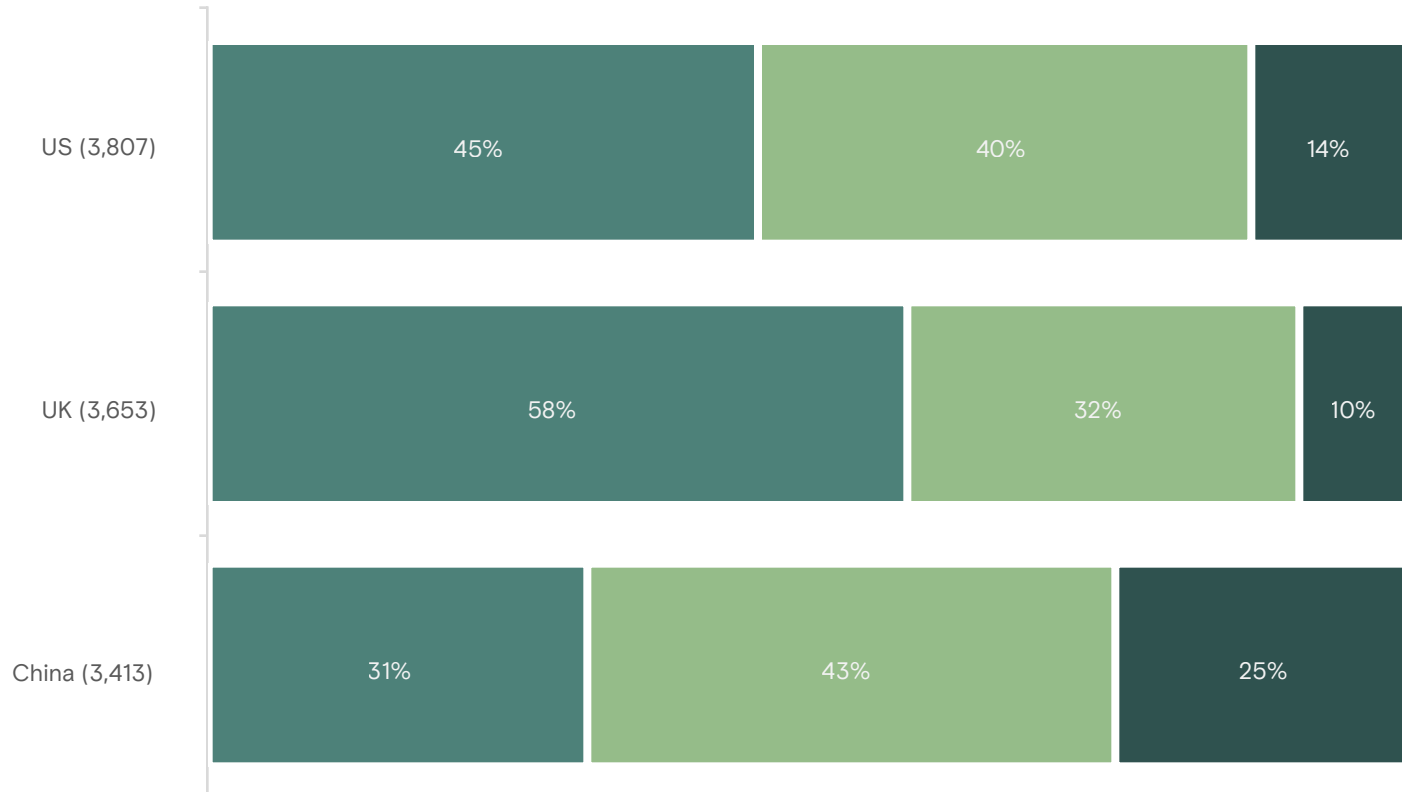


Classification of the item – overall

Q9. How would you describe the item?

BASE = ITEMS, E.G. 45% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 ARE DESCRIBED AS A HIGH STREET ITEM.

- High Street Item (e.g. Topshop, H&M, Asos, Mango, Laura Ashley, Boden, Monsoon, Hollister, Superdry, Fat Face, Zara)
- Premium item (e.g. All Saints, Whistles, Cos, DKNY, Levi's, Diesel, Calvin Klein, Ralph Lauren, Hobbs, Tommy Hilfiger, Reiss, The North Face)
- Luxury Fashion Item (e.g. Kenzo, Chloe, Versace, Stella McCartney, Burberry, Missoni, Prada, Gucci, Moschino, Acne Studios, Alexander McQueen, Comme des Garçons)

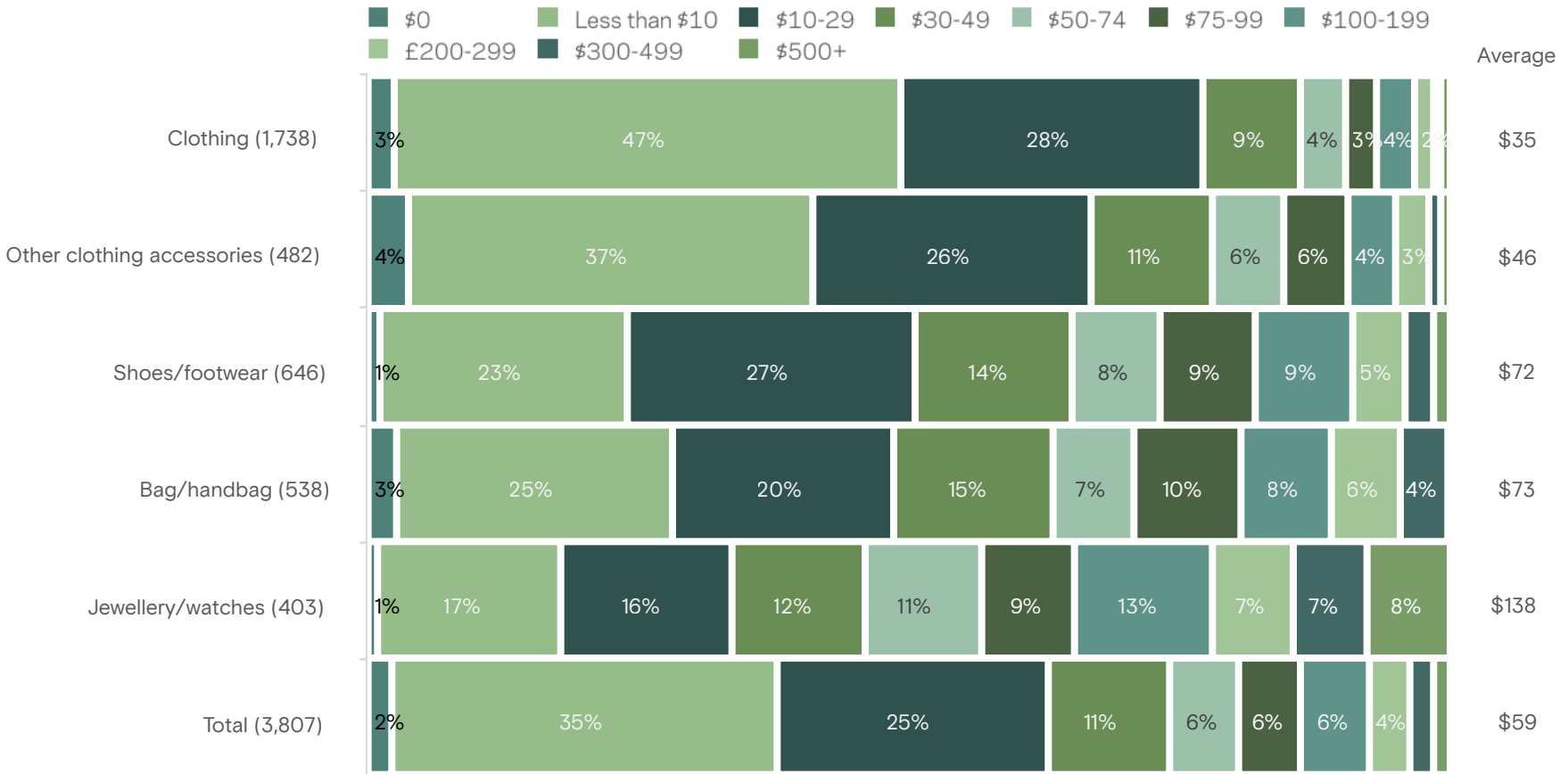


Price of the items - US

Q9. How much did you pay for the item?

BASE = ITEMS, E.G. 35% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE LESS THAN \$10. NB: If

respondents selected \$500+ for the average price calculation it was assumed they paid \$650.

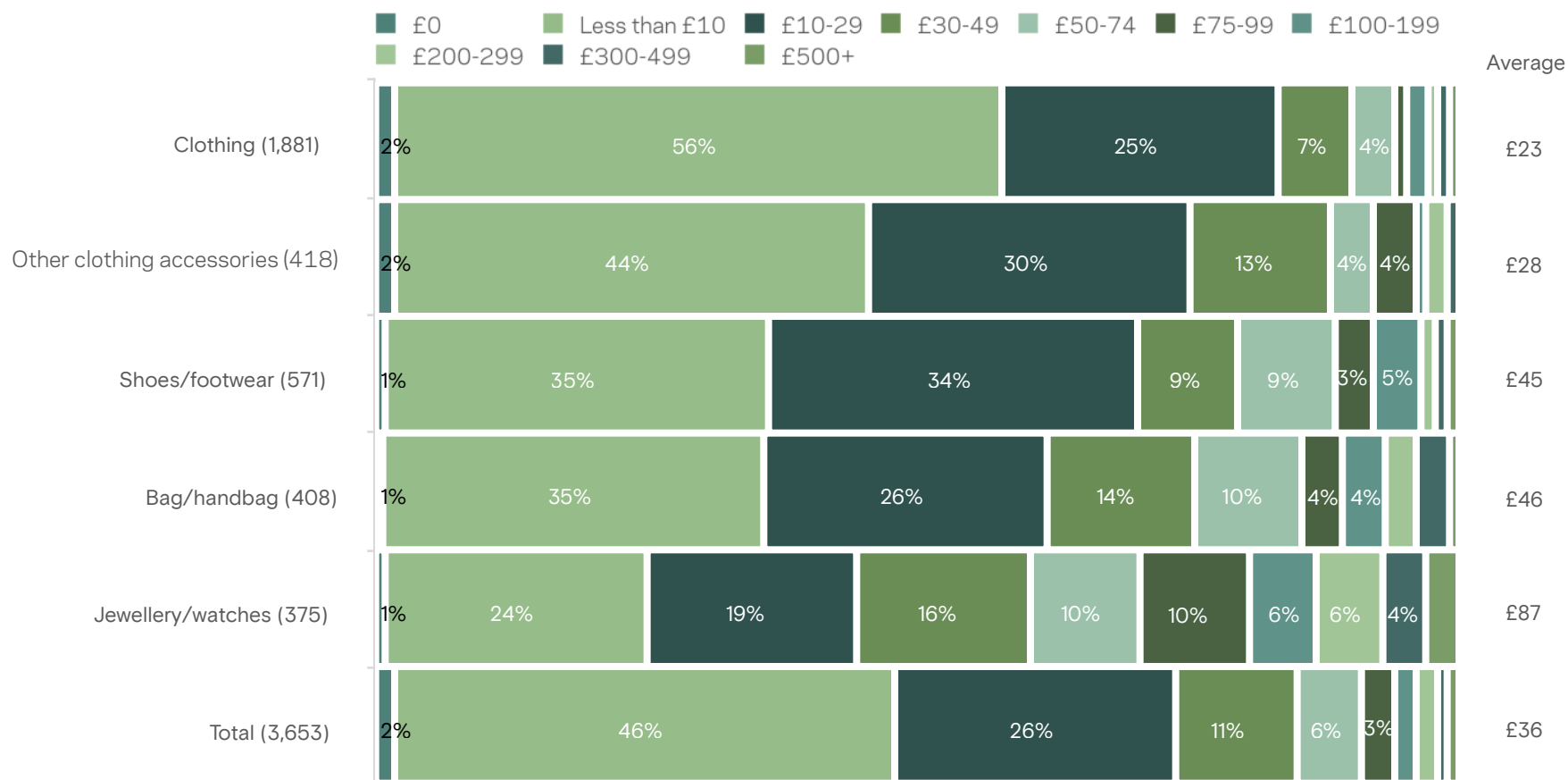


Price of the items - UK

Q9. How much did you pay for the item?

BASE = ITEMS, E.G. 46% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 WERE LESS THAN £10. NB: If

respondents selected £500+ for the average price calculation it was assumed they paid £650.

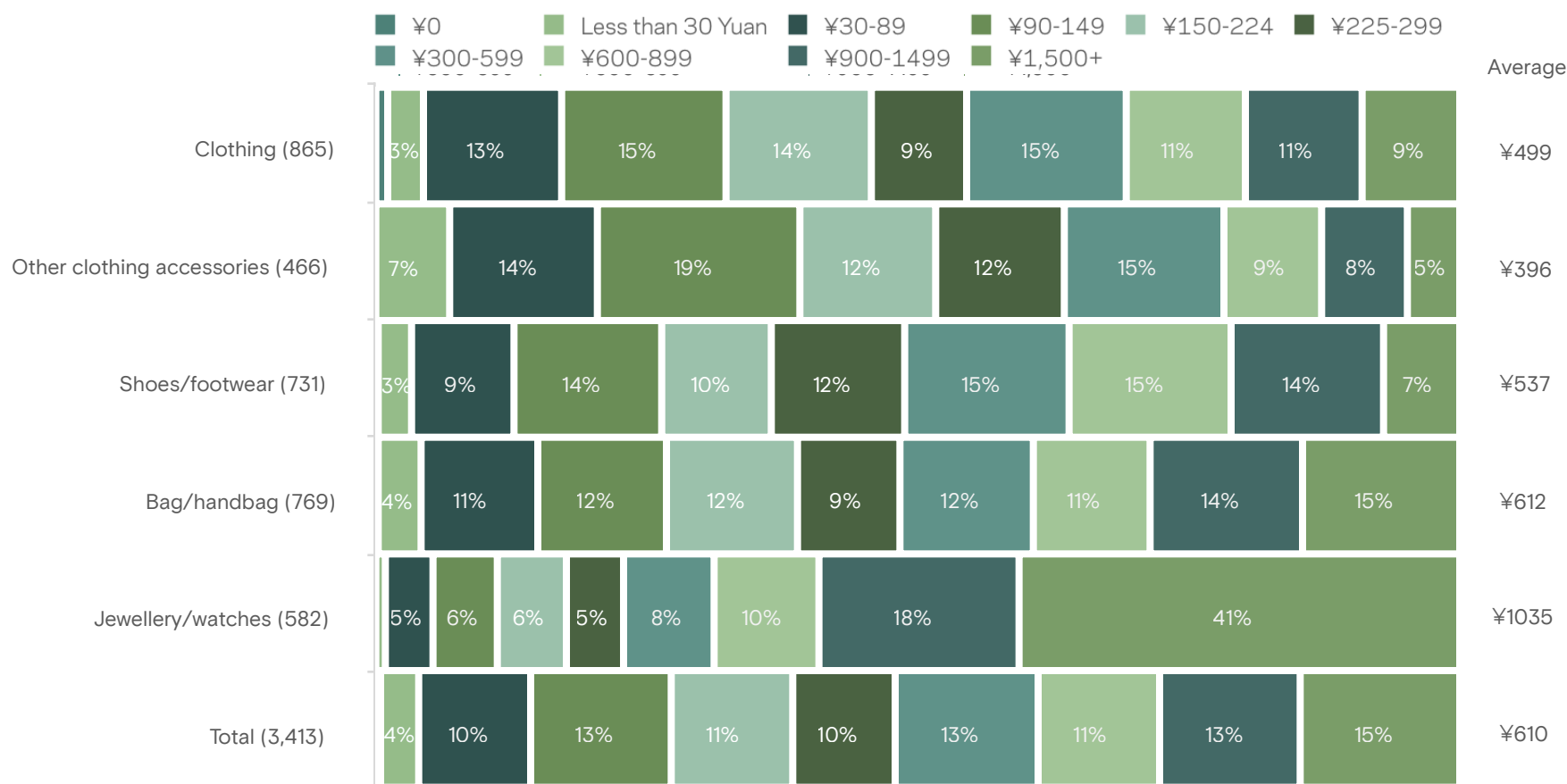


Price of the items - China

Q9. How much did you pay for the item?

BASE = ITEMS, E.G. 4% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 WERE LESS THAN 30 YUAN. NB: If

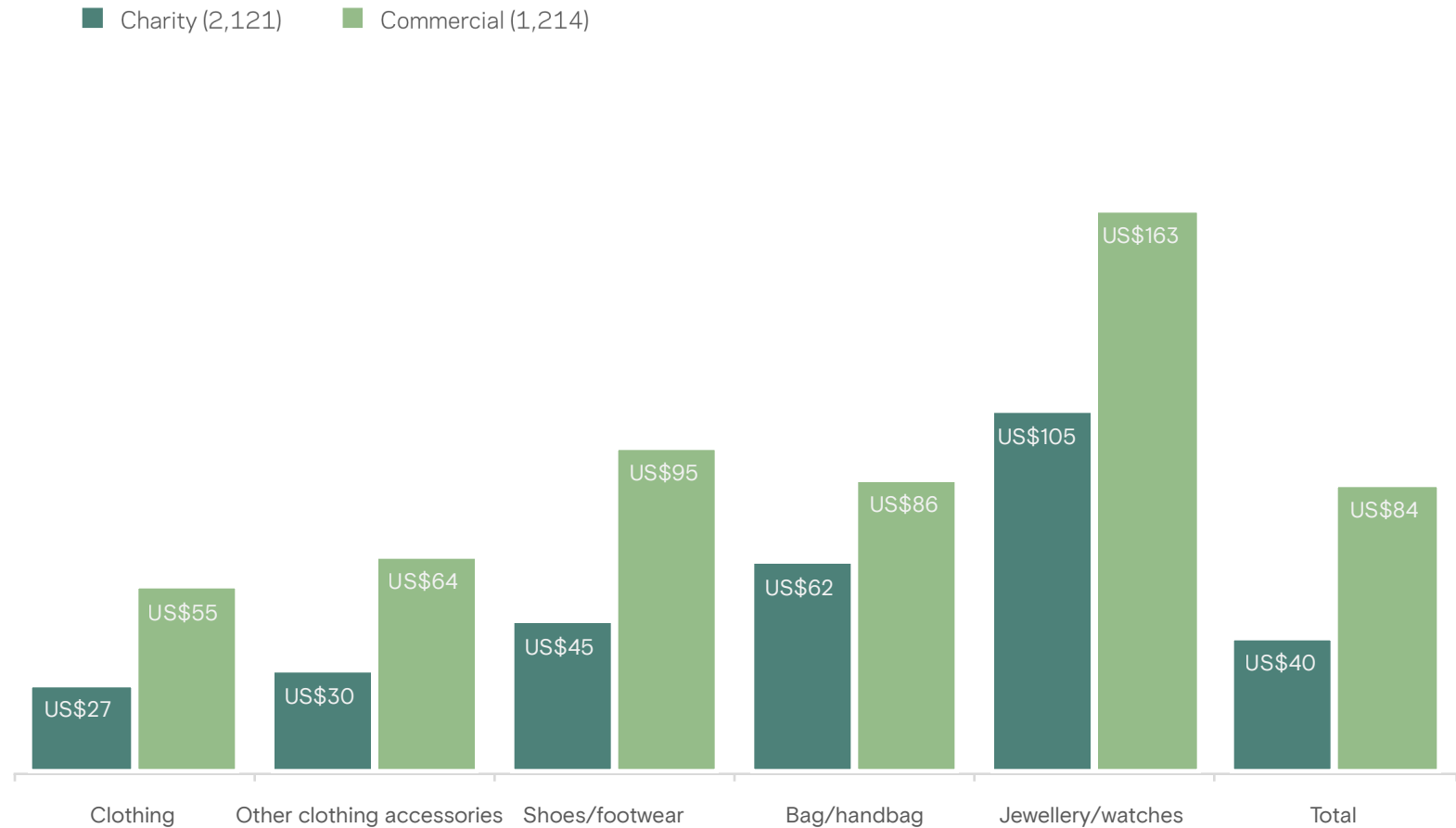
respondents selected ¥1,500+ for the average price calculation it was assumed they paid ¥1,650.



Price – charity vs commercial – US

This graph shows the average price of items in the US purchased via charity and commercial routes.

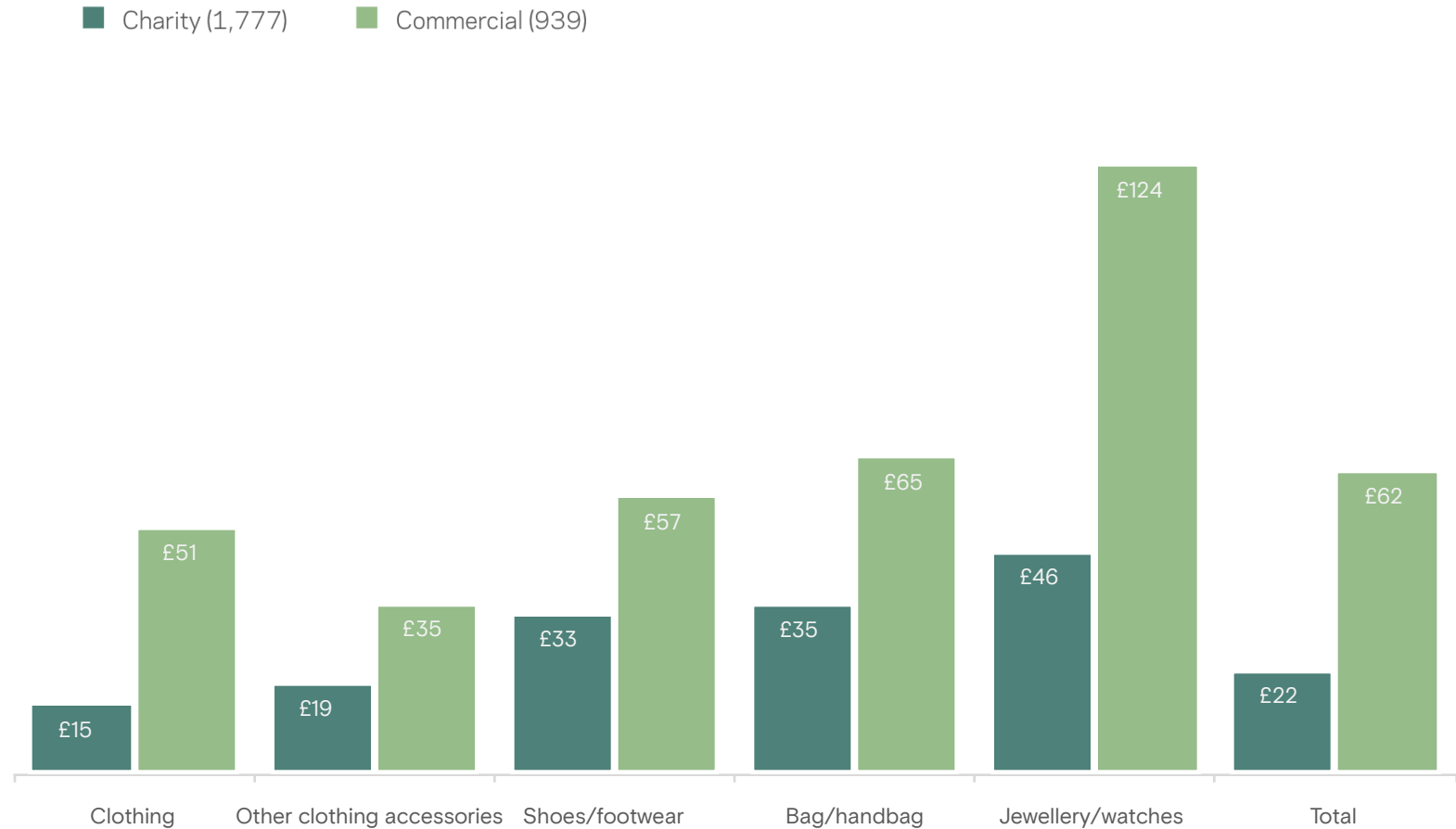
NB: Commercial purchases include items brought from an online retailer and in a commercial shop, it excludes items brought from Ebay, on social media and online listings. If respondents selected \$500+ for the average price calculation it was assumed they paid \$650.



Price – charity vs commercial – UK

This graph shows the average price of items in the UK purchased via charity and commercial routes.

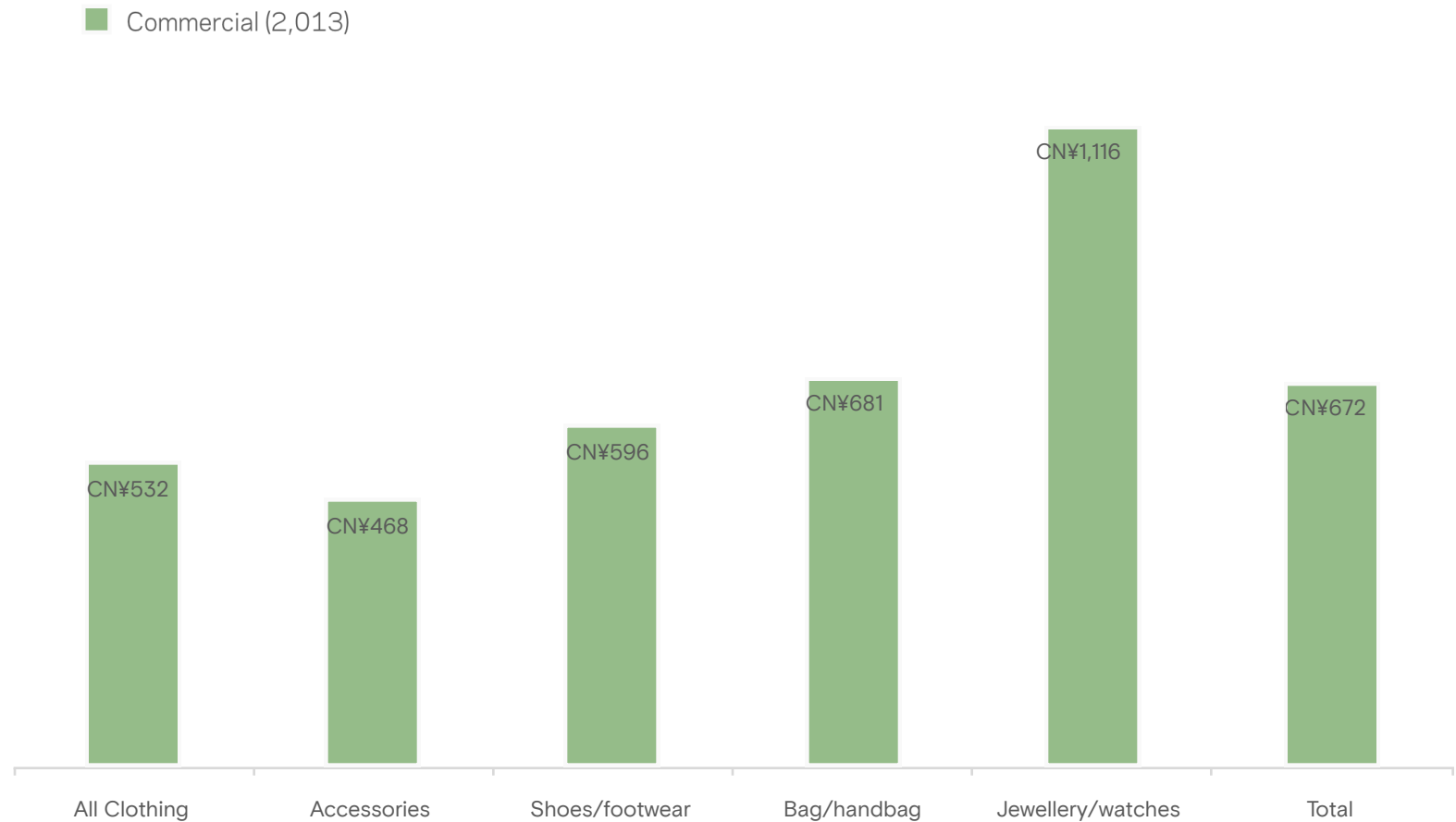
NB: Commercial purchases include items brought from an online retailer and in a commercial shop, it excludes items brought from Ebay, on social media and online listings. If respondents selected £500+ for the average price calculation it was assumed they paid £650.



Price – commercial – China

This graph shows the average price of items in the China purchased via commercial routes.

NB: Commercial purchases include items brought from an online retailer and in a commercial shop, it excludes items brought from Ebay, on social media and online listings. Charity prices are excluded from this graph as the sample sizes are too small. If respondents selected ¥1,500+ for the average price calculation it was assumed they paid ¥1,650.

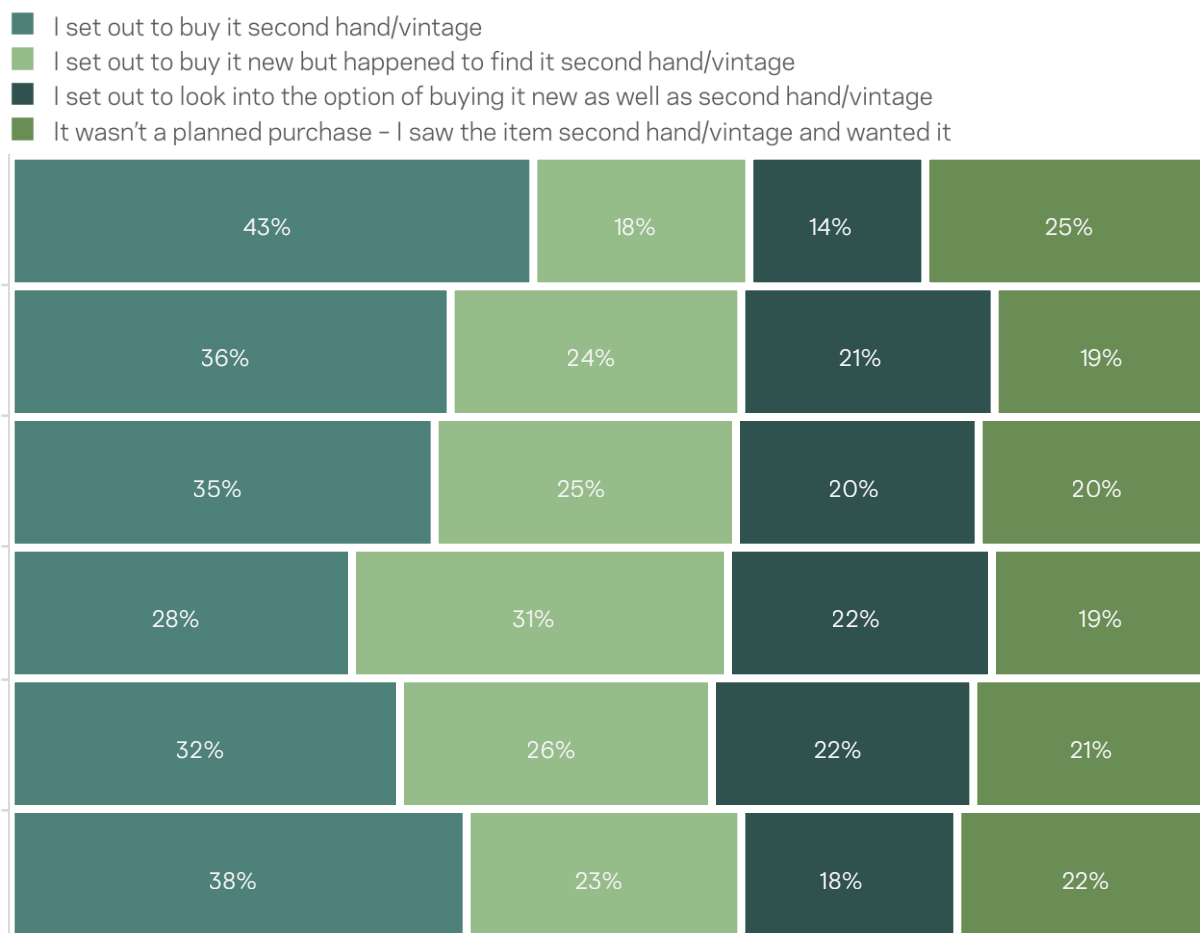


4. Intention to purchase second hand/ vintage, and motivations for doing so

Intention to purchase second hand/vintage – US

Q11. Which of the following statements best applies about each of the items?

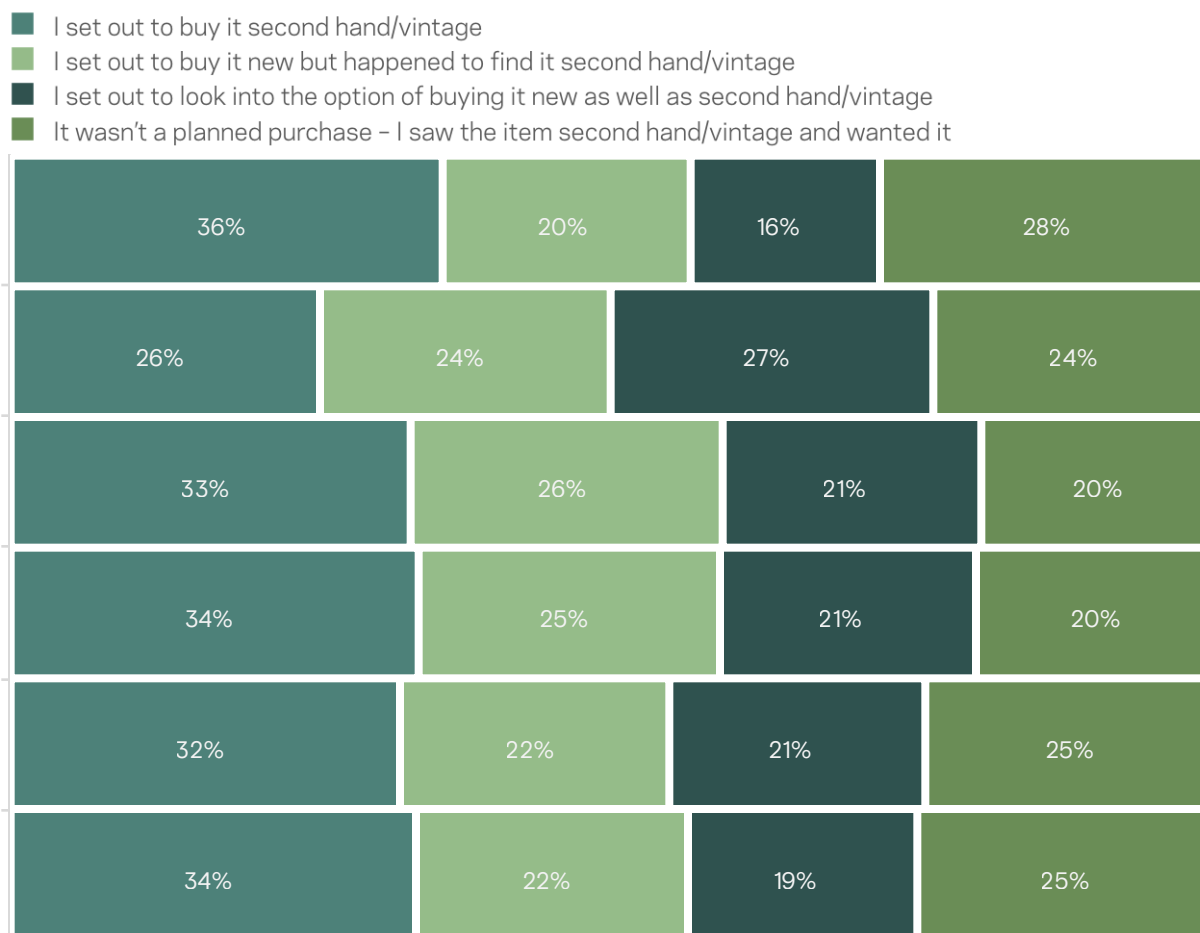
BASE = ITEMS. E.G. 28% OF BAGS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 WERE SET OUT TO BE PURCHASED SECOND HAND/VINTAGE VS. 31% THAT WERE ORIGINALLY SET OUT BE PURCHASED NEW.



Intention to purchase second hand/vintage – UK

Q11. Which of the following statements best applies about each of the items?

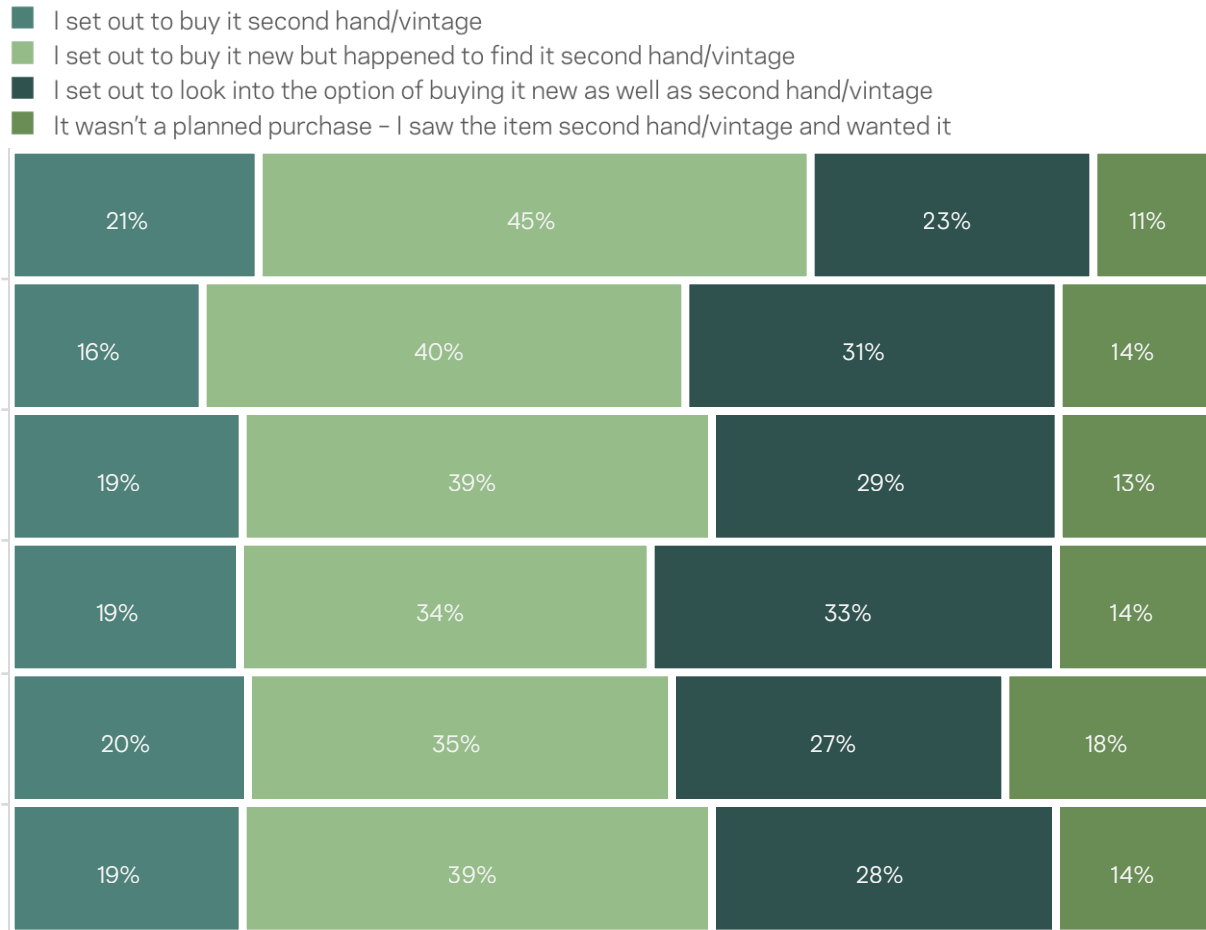
BASE = ITEMS. E.G. 34% OF BAGS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 WERE SET OUT TO BE PURCHASED SECOND HAND/VINTAGE VS. 25% THAT WERE ORIGINALLY SET OUT BE PURCHASED NEW.



Intention to purchase second hand/vintage – China

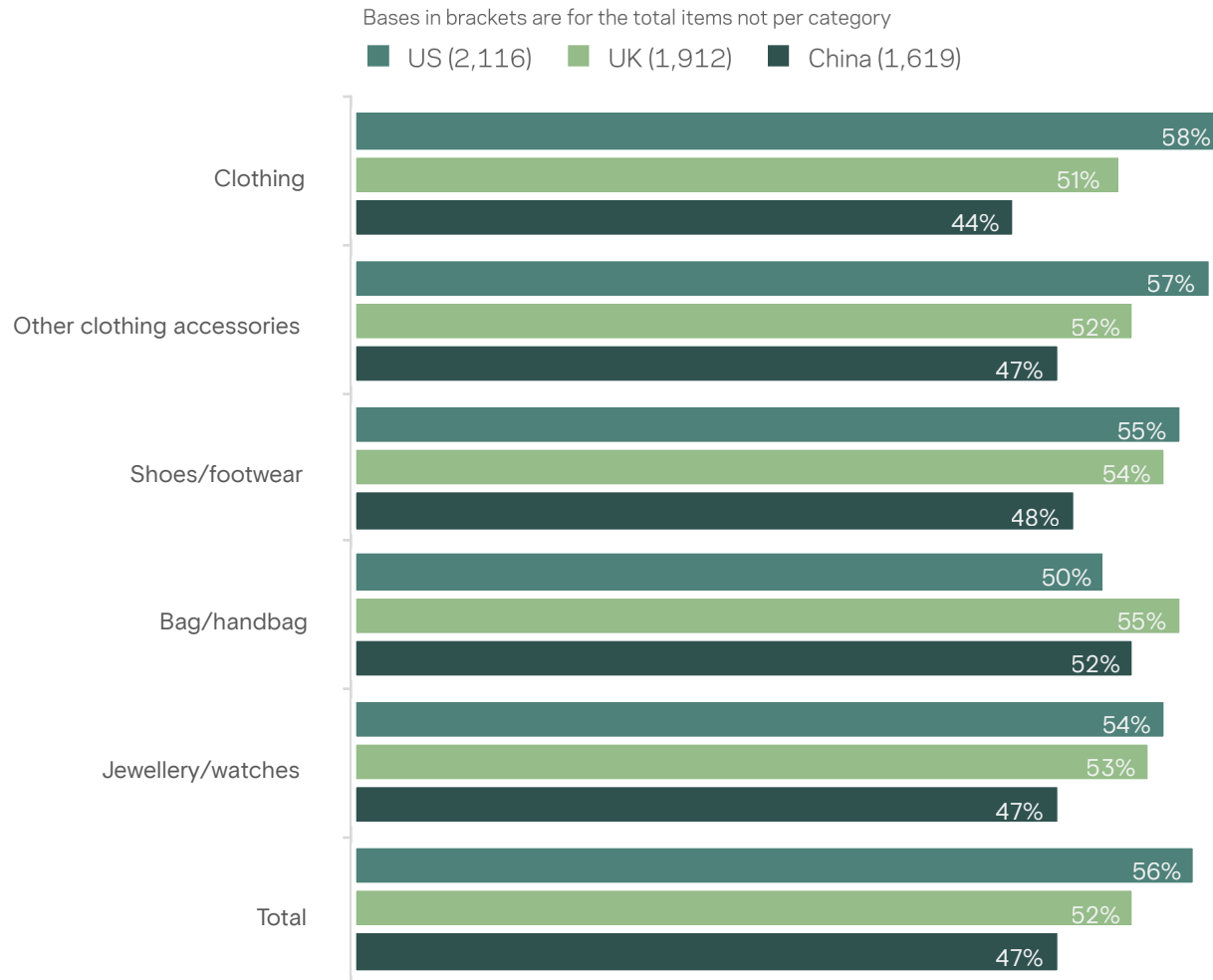
Q11. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 19% OF BAGS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 WERE SET OUT TO BE PURCHASED SECOND HAND/VINTAGE VS. 34% THAT WERE ORIGINALLY SET OUT BE PURCHASED NEW.



Intention to purchase second hand/vintage – overall

This graph shows the percentage of items purchased second hand/vintage in 2019 which were set out to be purchased second hand/vintage and/or where a second hand/vintage option would be considered alongside buying it new.

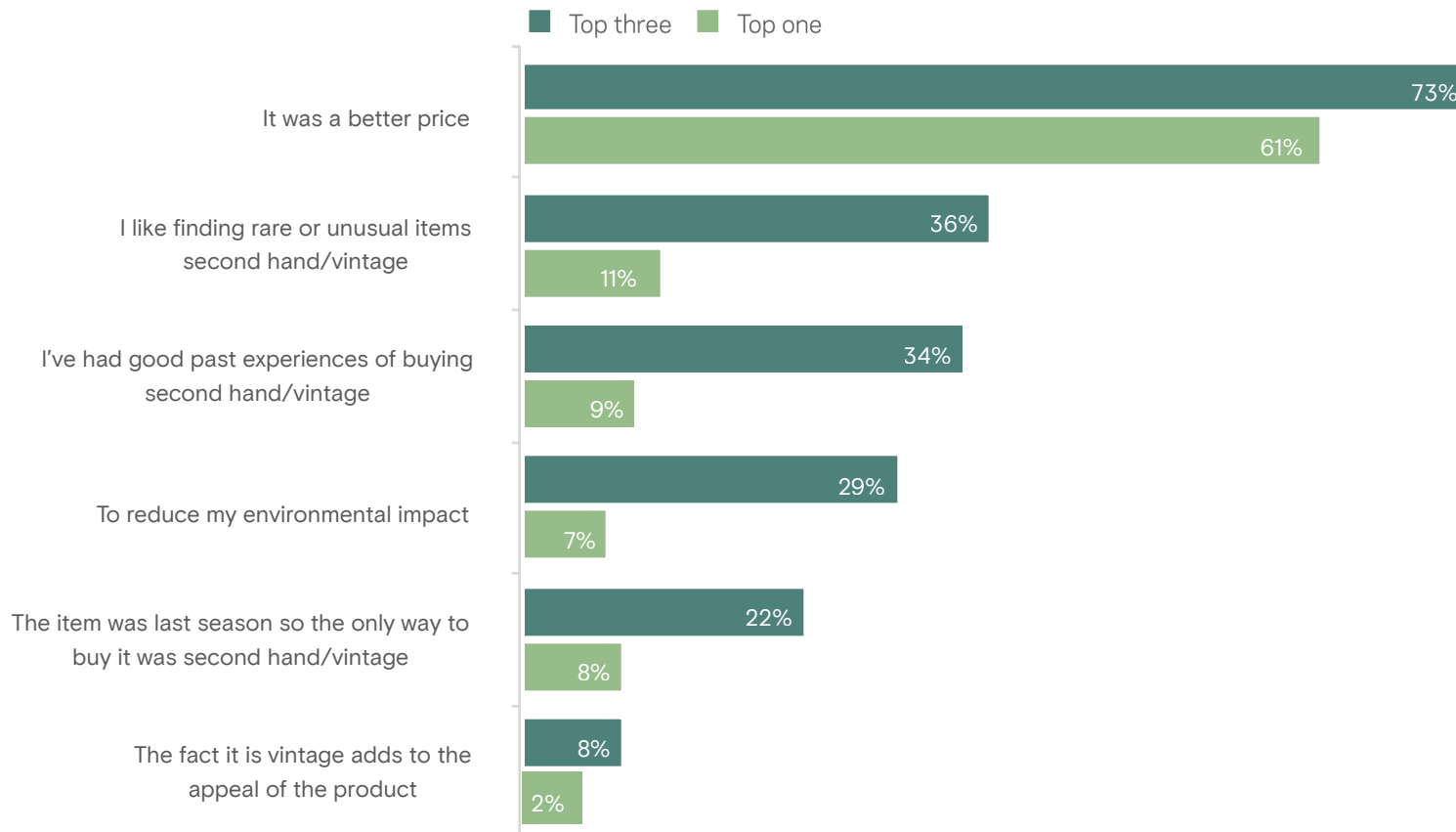


Motivations to purchase second hand/vintage – US

Q12a. You said that you intended to purchase, or consider purchasing [this item][these items] second hand/vintage. What was the reason for this? Select up to three

Q12b. And if you had to pick one, what would you say was the main reason?

NB. BASE = CONSUMERS. E.G. 73% OF CONSUMERS IN THE US MENTION PRICE AS ONE OF THEIR TOP THREE REASONS FOR BUYING THE ITEM(S) SECOND HAND/VINTAGE.

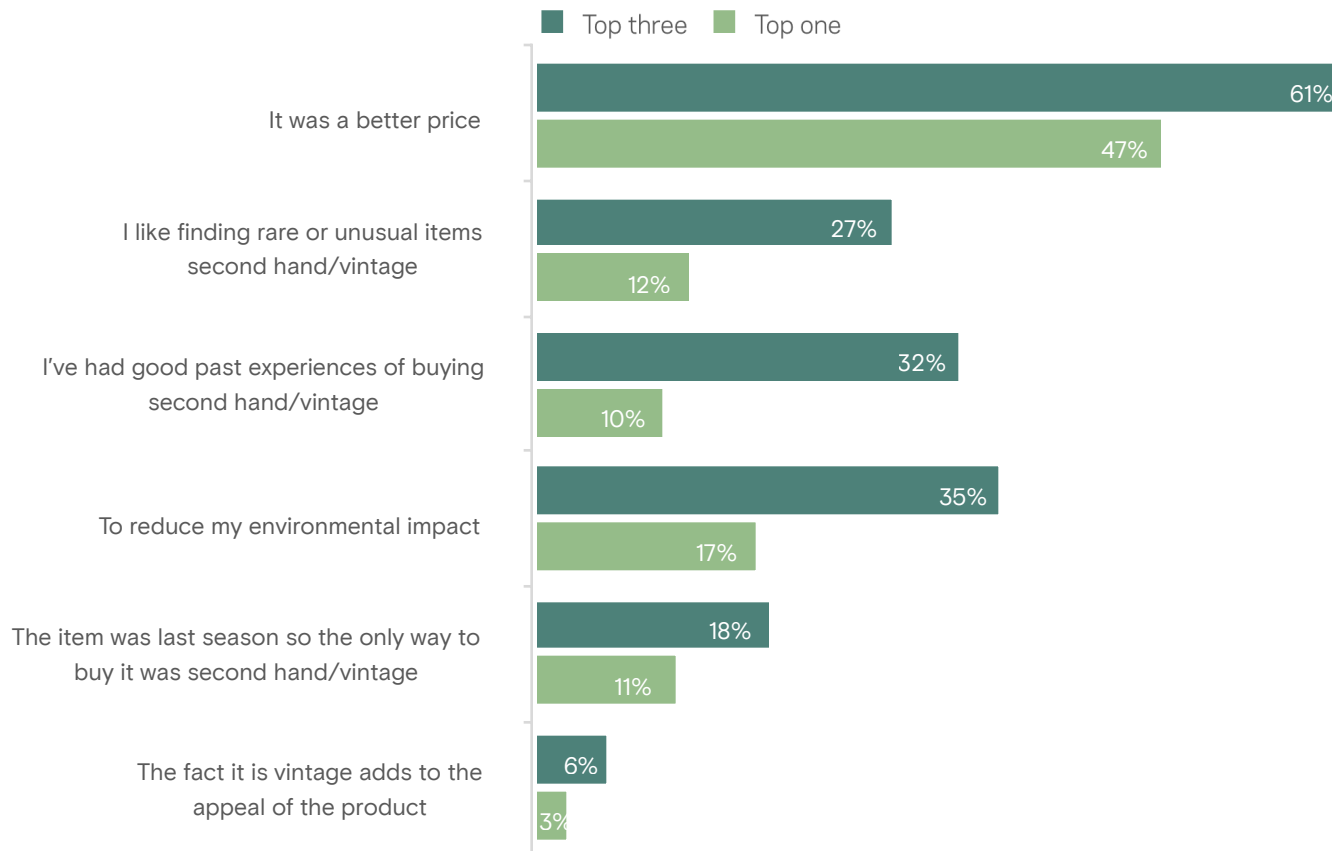


Motivations to purchase second hand/vintage – UK

Q12a. You said that you intended to purchase, or consider purchasing [this item][these items] second hand/vintage. What was the reason for this? Select up to three

Q12b. And if you had to pick one, what would you say was the main reason?

NB. BASE = CONSUMERS. E.G. 61% OF CONSUMERS IN THE UK MENTION PRICE AS ONE OF THEIR TOP THREE REASONS FOR BUYING THE ITEM(S) SECOND HAND/VINTAGE.

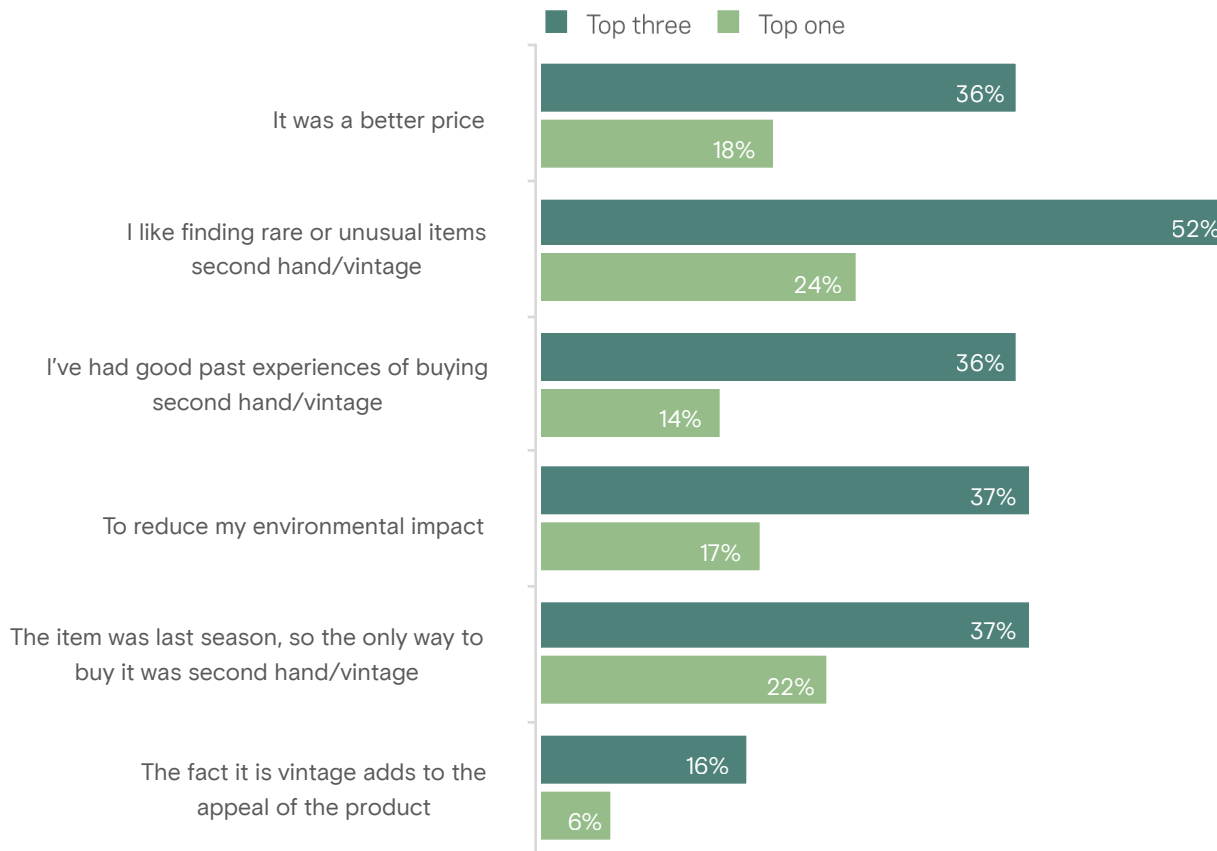


Motivations to purchase second hand/vintage – China

Q12a. You said that you intended to purchase, or consider purchasing [this item][these items] second hand/vintage. What was the reason for this? Select up to three.

Q12b. And if you had to pick one, what would you say was the main reason?

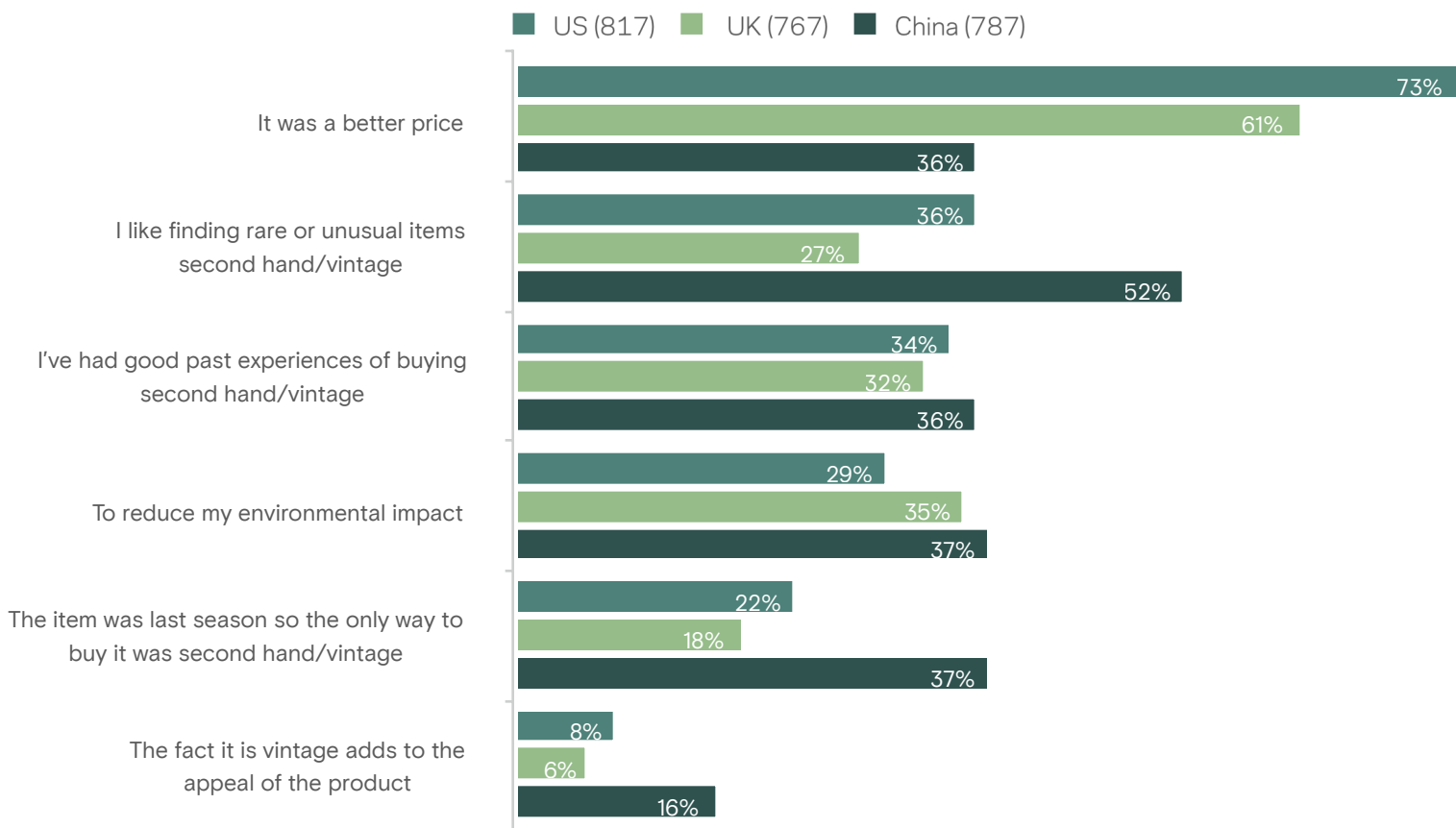
NB. BASE = CONSUMERS. E.G. 36% OF CONSUMERS IN CHINA MENTION PRICE AS ONE OF THEIR TOP THREE REASONS FOR BUYING THE ITEM(S) SECOND HAND/VINTAGE.



Motivations to purchase second hand/vintage – overall

Q12a. You said that you intended to purchase, or consider purchasing [this item][these items] second hand/vintage. What was the reason for this? Select up to three.

The graph shows the percentage of consumers who cite each motivation as one of their top three reasons they looked to purchase the item second hand (i.e. in their top three choices).



Base: Respondents who set out to either purchase second hand/vintage or consider it as an option (bases in brackets)

5. Displacement

As stated in the footer, when calculating displacement only items purchased for the respondent or someone in the home were considered (excluding items purchased for people outside of the home). It was assumed that if the item was purchased for someone not living in the home, the respondent would not be able to judge if the item displaced the purchase of a new item.

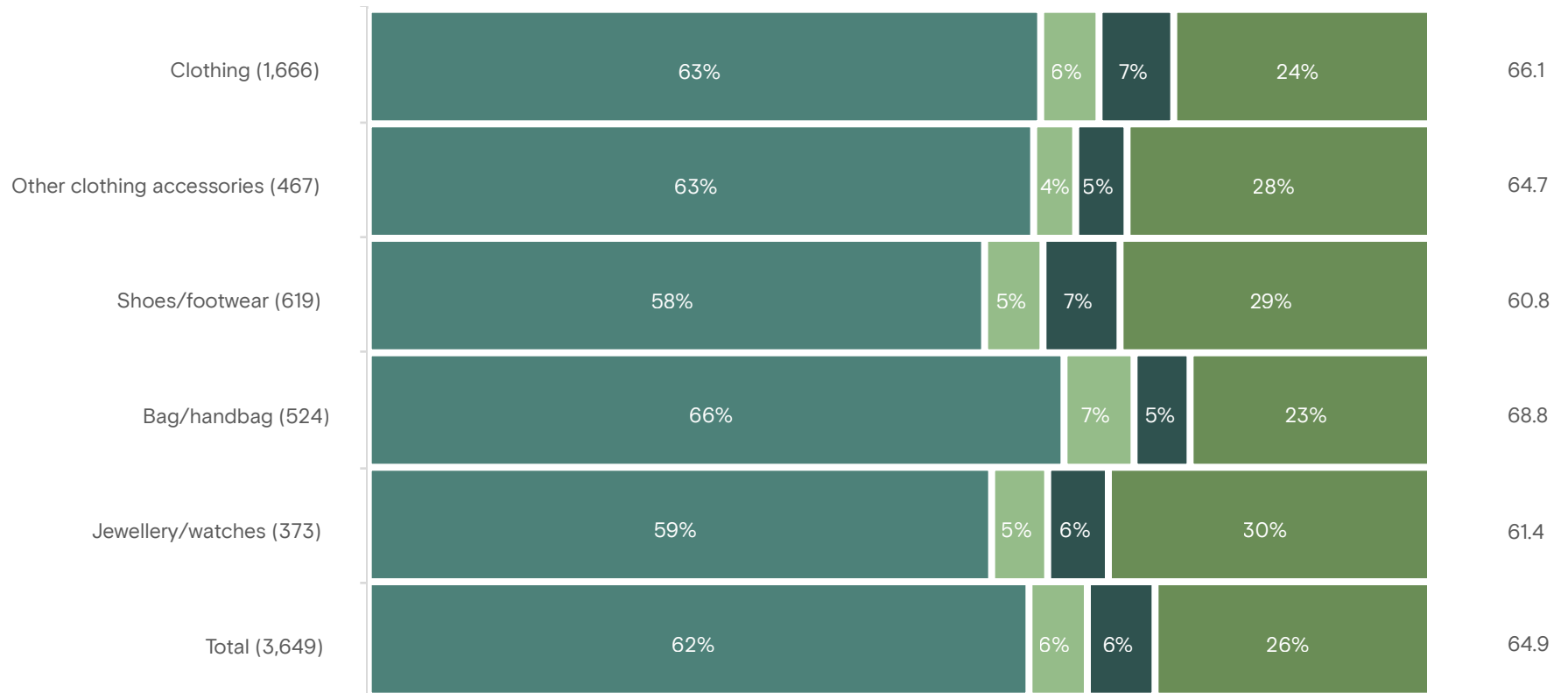
Displacement - US

Q14a/b. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 66% OF SECOND HAND/VINTAGE BAG PURCHASES IN THE US IN 2019 PREVENTED THE PURCHASE OF A NEW ITEM. NB: Rate of displacement calculation on the right, calculates the overall displacement based on the methodology outlined on pages 8-11.

- Buying this second hand/vintage prevented the purchase of a new item (i.e. it meant that I didn't have to buy the same item new)
- It probably prevented the purchase of a new item, for example I didn't buy a similar item new for quite a while afterwards
- It probably did not prevent the purchase of a new item, for example I purchased something similar around the same time or quite soon afterwards
- Buying this second hand/vintage purchase did not prevent the purchase of a new item (i.e. I purchased the same item new around the same time)

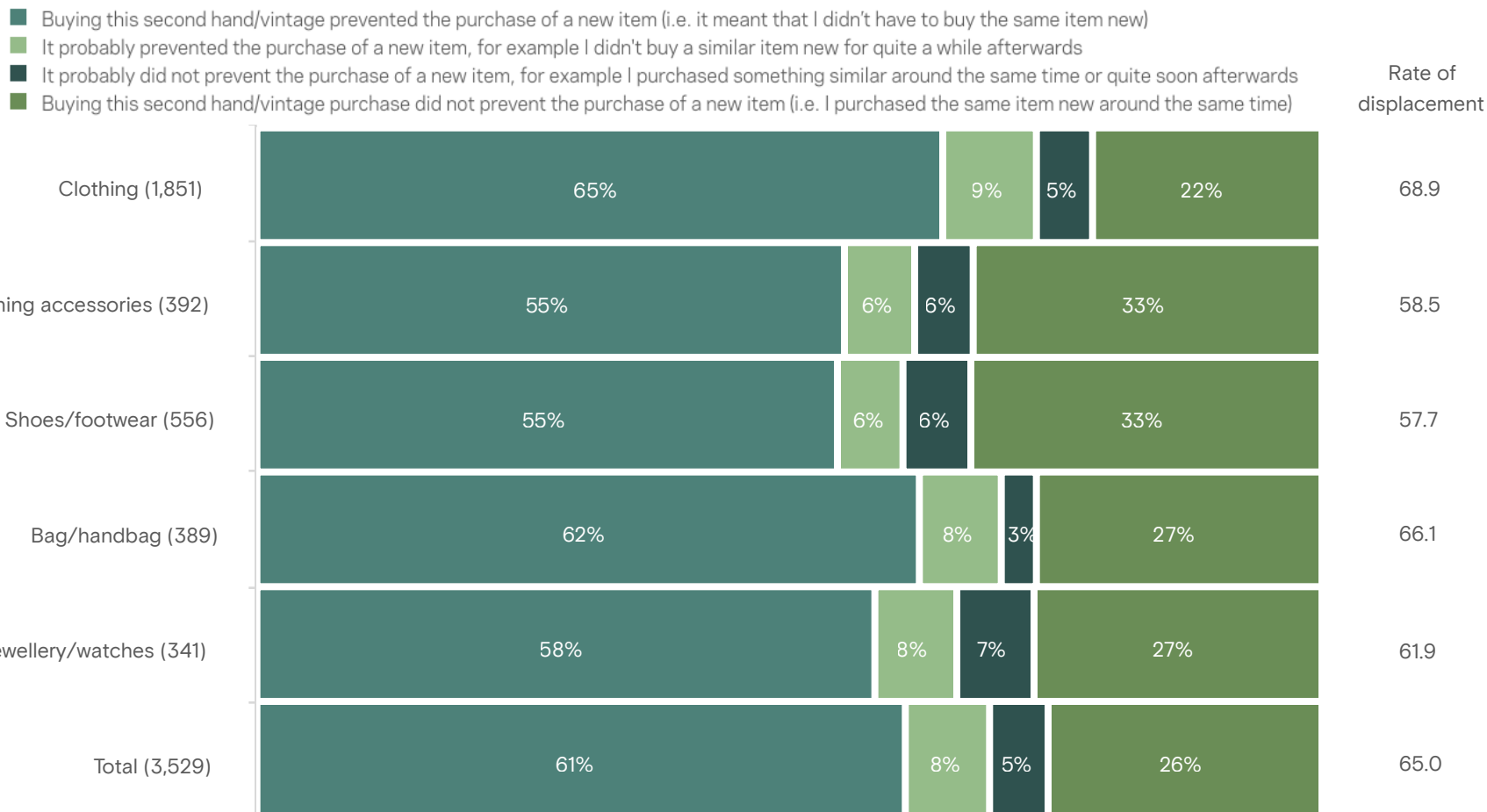
Rate of
displacement



Displacement – UK

Q14a/b. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 62% OF SECOND HAND/VINTAGE BAG PURCHASES IN THE UK IN 2019 PREVENTED THE PURCHASE OF A NEW ITEM. NB: Rate of displacement calculation on the right, calculates the overall displacement based on the methodology outlined on pages 8-11.

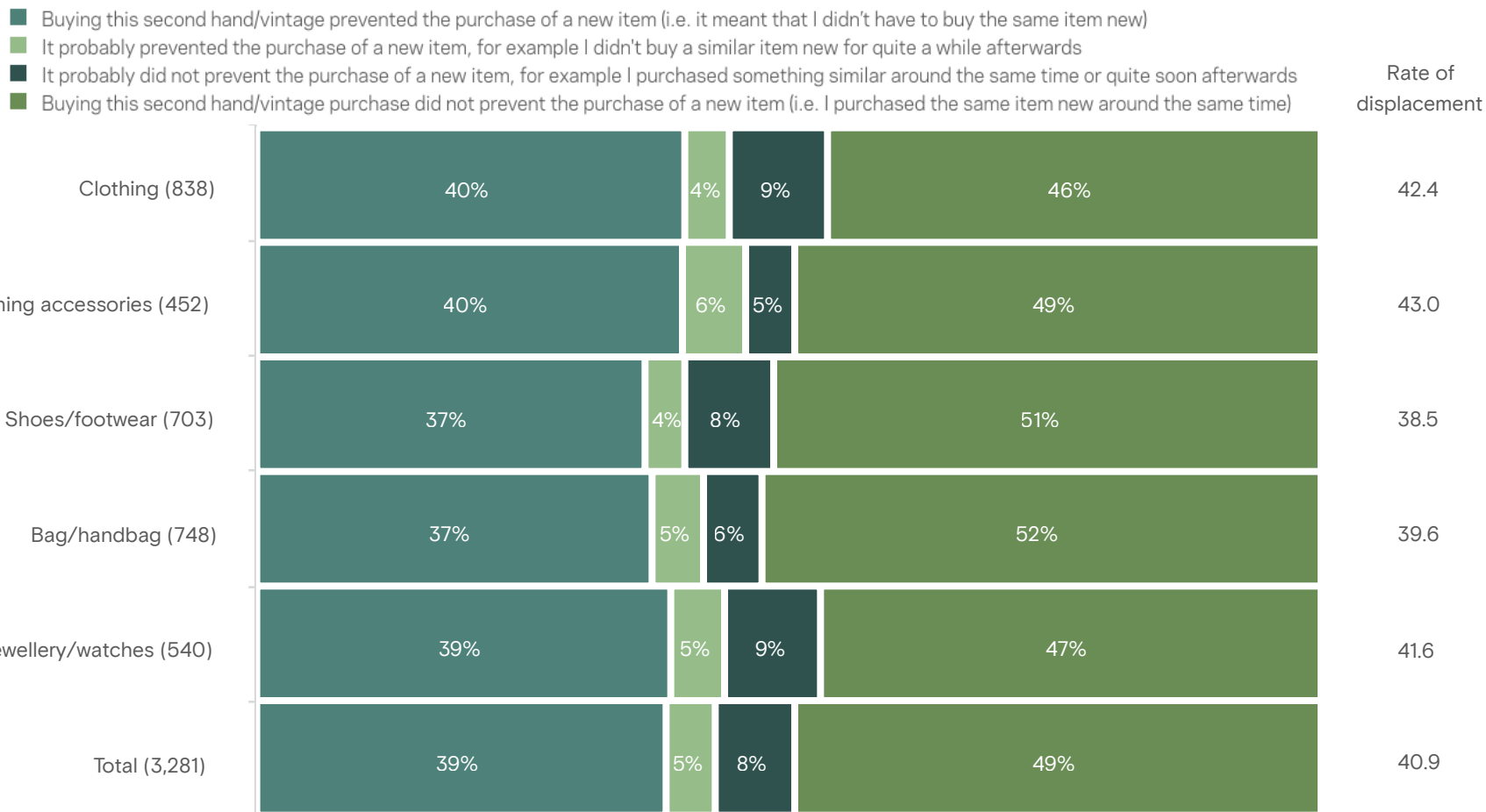


Displacement – China

Q14a/b. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 37% OF SECOND HAND/VINTAGE BAG PURCHASES IN CHINA IN 2019 PREVENTED THE PURCHASE OF A NEW ITEM. NB: Rate of

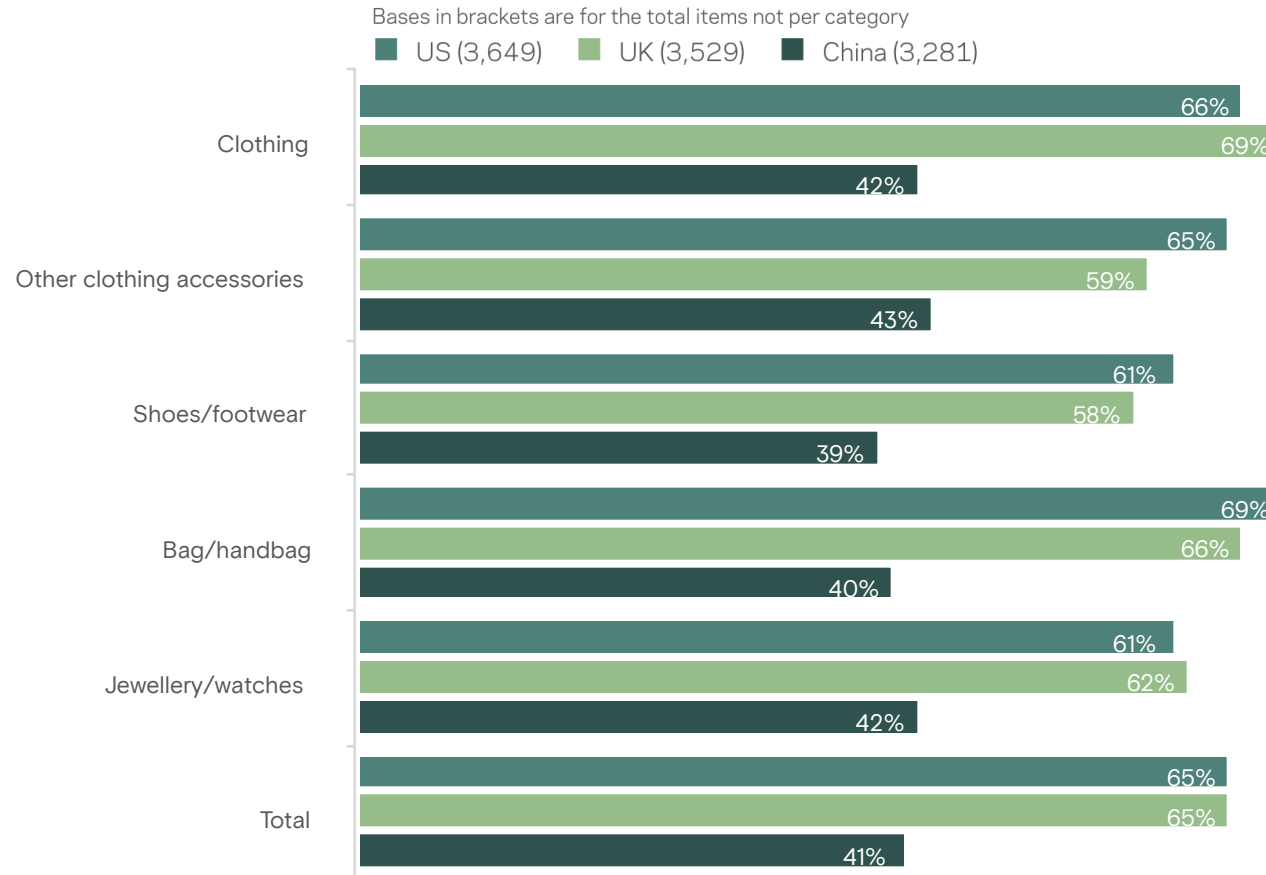
displacement calculation on the right, calculates the overall displacement based on the methodology outlined on pages 8–11.



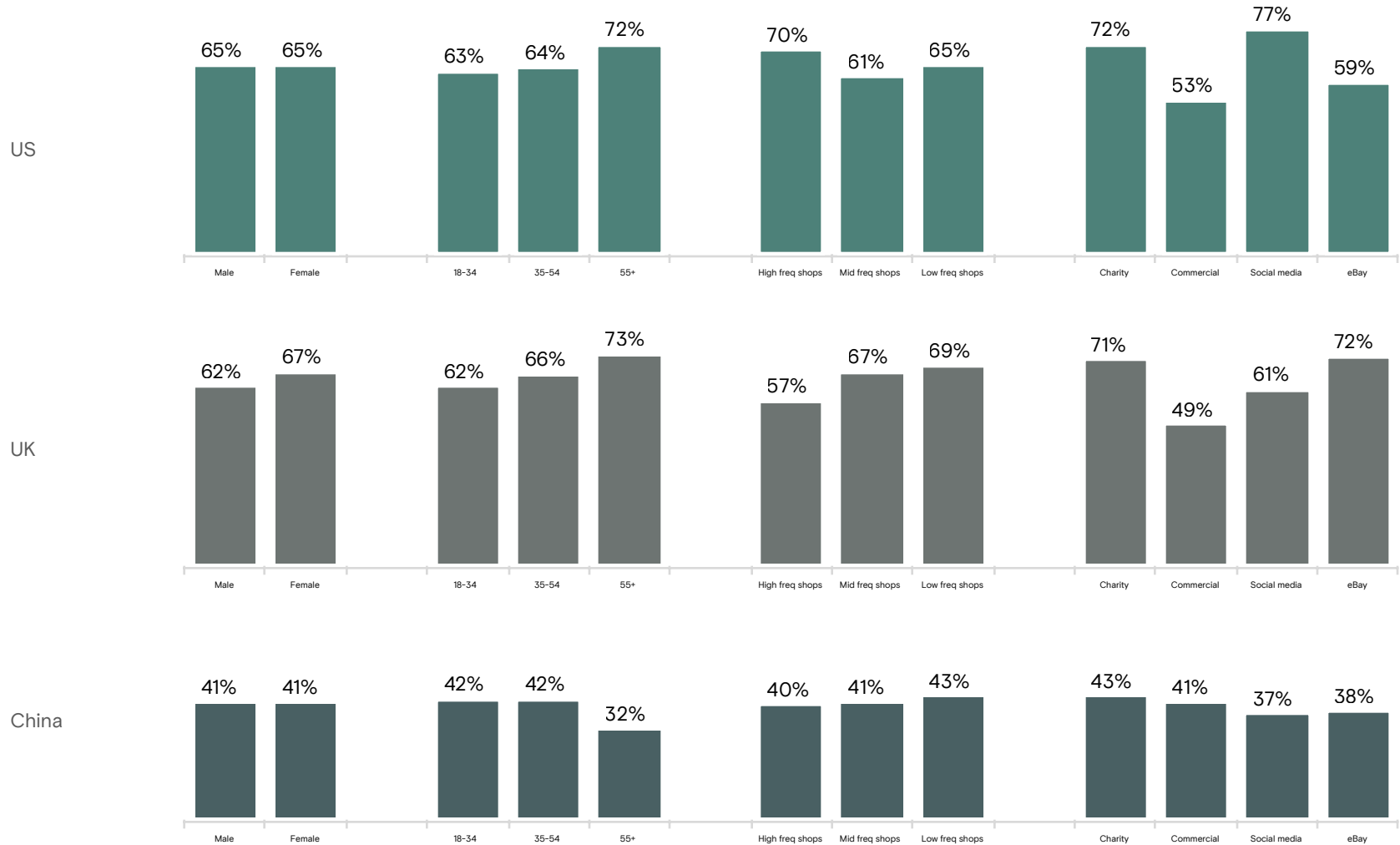
Displacement rates – averages

This graph shows the average rate of displacement, calculated using the methodology outlined on pages 8-11.

BASE = ITEMS. E.G. THE AVERAGE RATE OF DISPLACEMENT FOR BAGS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 IS 69% - COMPARED TO 66% IN THE UK AND 40% IN CHINA.



Displacement across consumer sub-groups



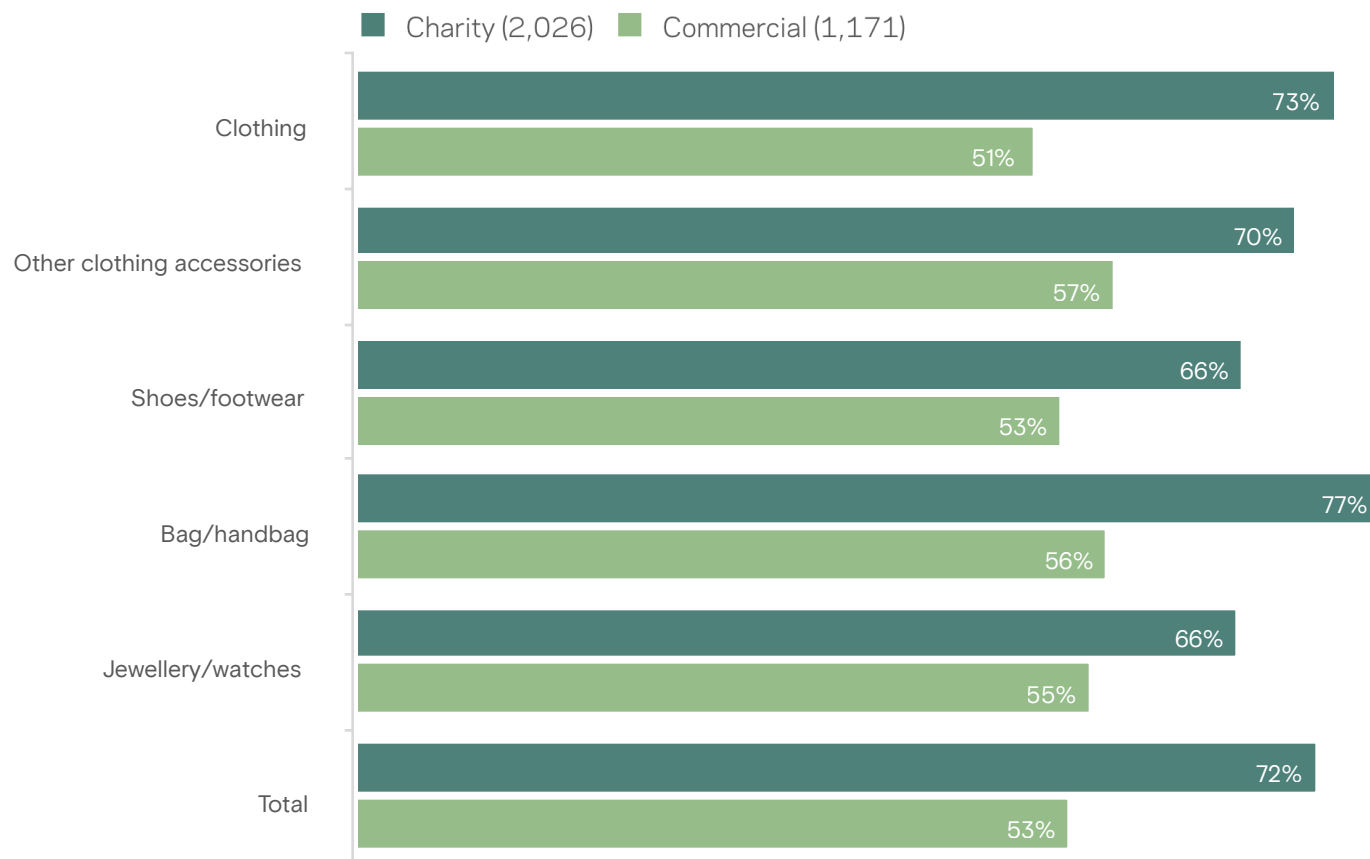
Base: Items purchased second hand/vintage for the respondent or someone in their home

Displacement rates – charity vs commercial – US

This graph shows the average rate of displacement for items purchased via charity and commercial routes, calculated using the methodology outlined on pages 8-11.

BASE = ITEMS. E.G. THE AVERAGE RATE OF DISPLACEMENT FOR BAGS PURCHASED SECOND HAND/VINTAGE IN A COMMERCIAL STORE IN THE US IS 56% – COMPARED TO 77% FOR BAGS PURCHASED SECOND HAND/VINTAGE IN A CHARITY SHOP.

NB: Commercial purchases include items brought from an online retailer and in a commercial shop, it excludes items brought from Ebay, on social media and online listings.

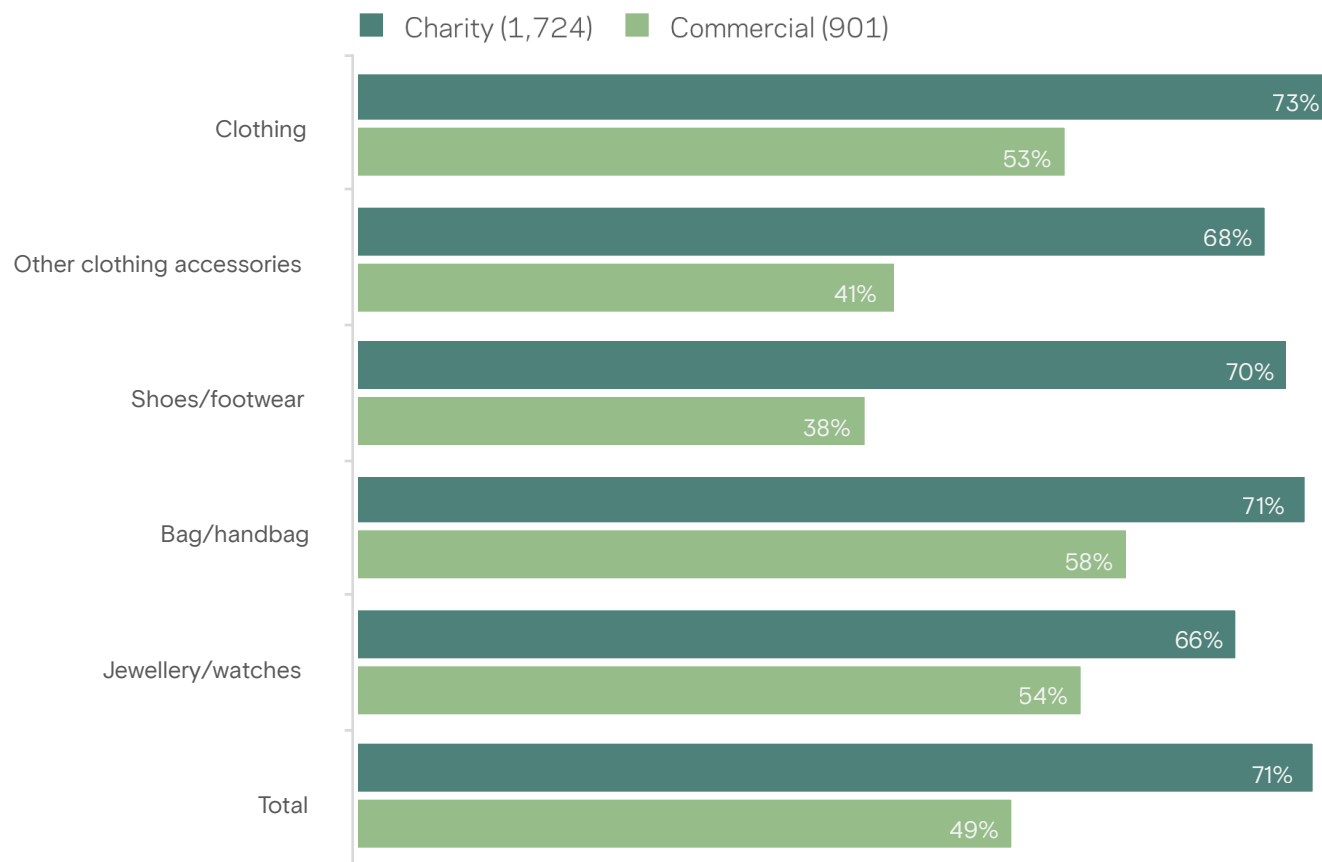


Displacement rates – charity vs commercial – UK

This graph shows the average rate of displacement for items purchased via charity and commercial routes, calculated using the methodology outlined on pages 8-11.

BASE = ITEMS. E.G. THE AVERAGE RATE OF DISPLACEMENT FOR BAGS PURCHASED SECOND HAND/VINTAGE IN A COMMERCIAL STORE IN THE UK IS 58% – COMPARED TO 71% FOR BAGS PURCHASED SECOND HAND/VINTAGE IN A CHARITY SHOP.

NB: Commercial purchases include items brought from an online retailer and in a commercial shop, it excludes items brought from Ebay, on social media and online listings.

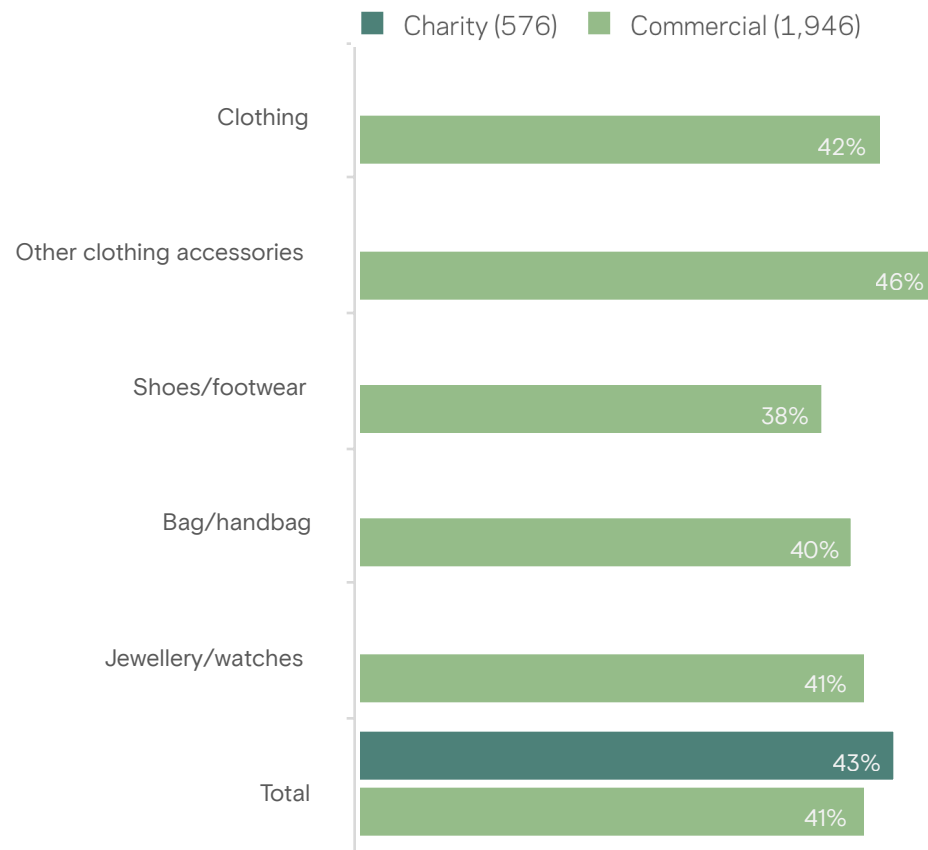


Displacement rates – charity vs commercial – China

This graph shows the average rate of displacement for items purchased via charity and commercial routes, calculated using the methodology outlined on pages 8-11.

BASE = ITEMS. E.G. THE AVERAGE RATE OF DISPLACEMENT FOR BAGS PURCHASED SECOND HAND/VINTAGE IN A COMMERCIAL STORE IN CHINA IS 40%.

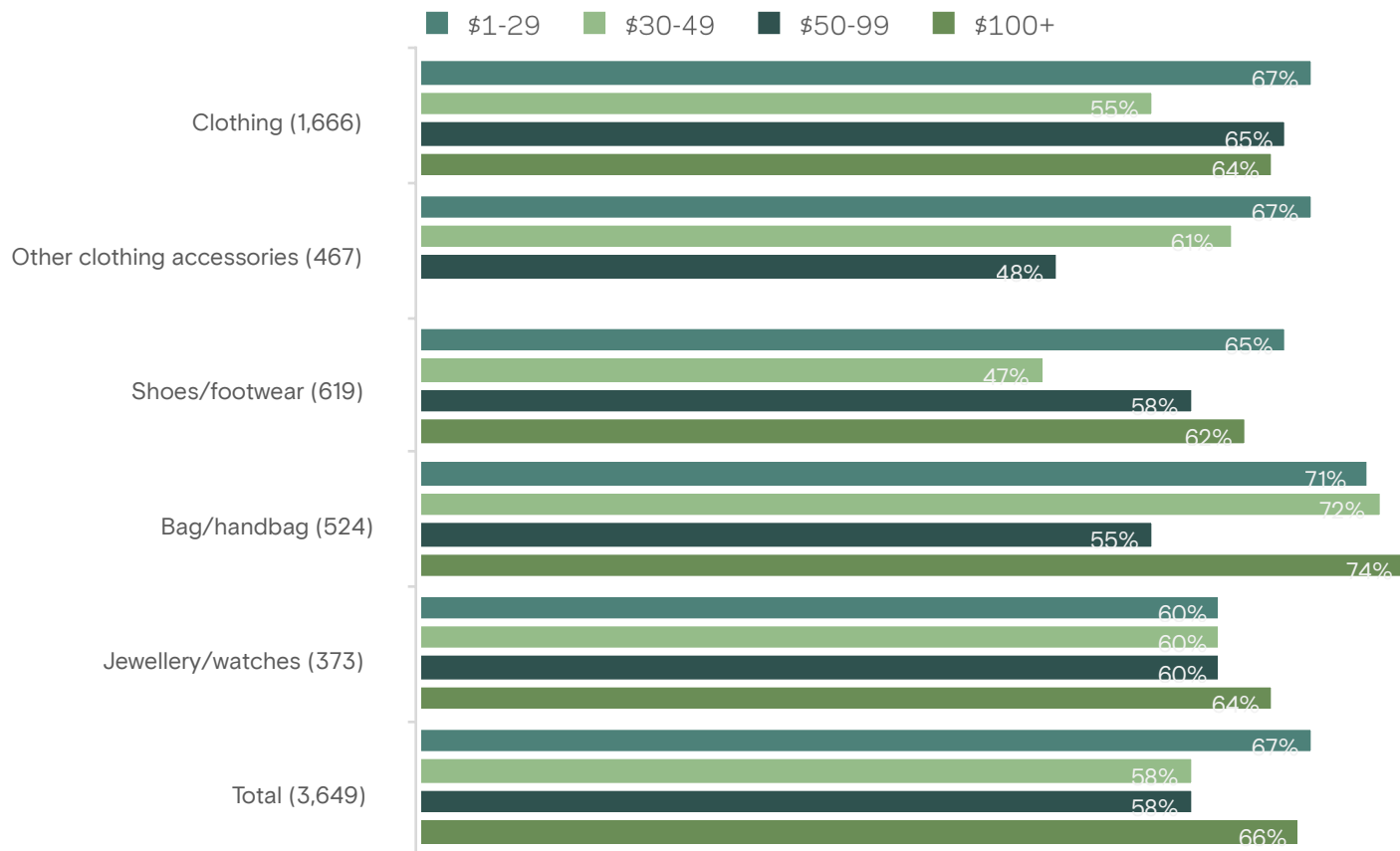
NB: Some data points have insufficient sample sizes and are left blank. Commercial purchases include items brought from an online retailer and in a commercial shop, it excludes items brought from Ebay, on social media and online listings.



Displacement rates by price paid – US

This graph shows the average rate of displacement at different purchase prices, calculated using the methodology outlined on pages 8-11.

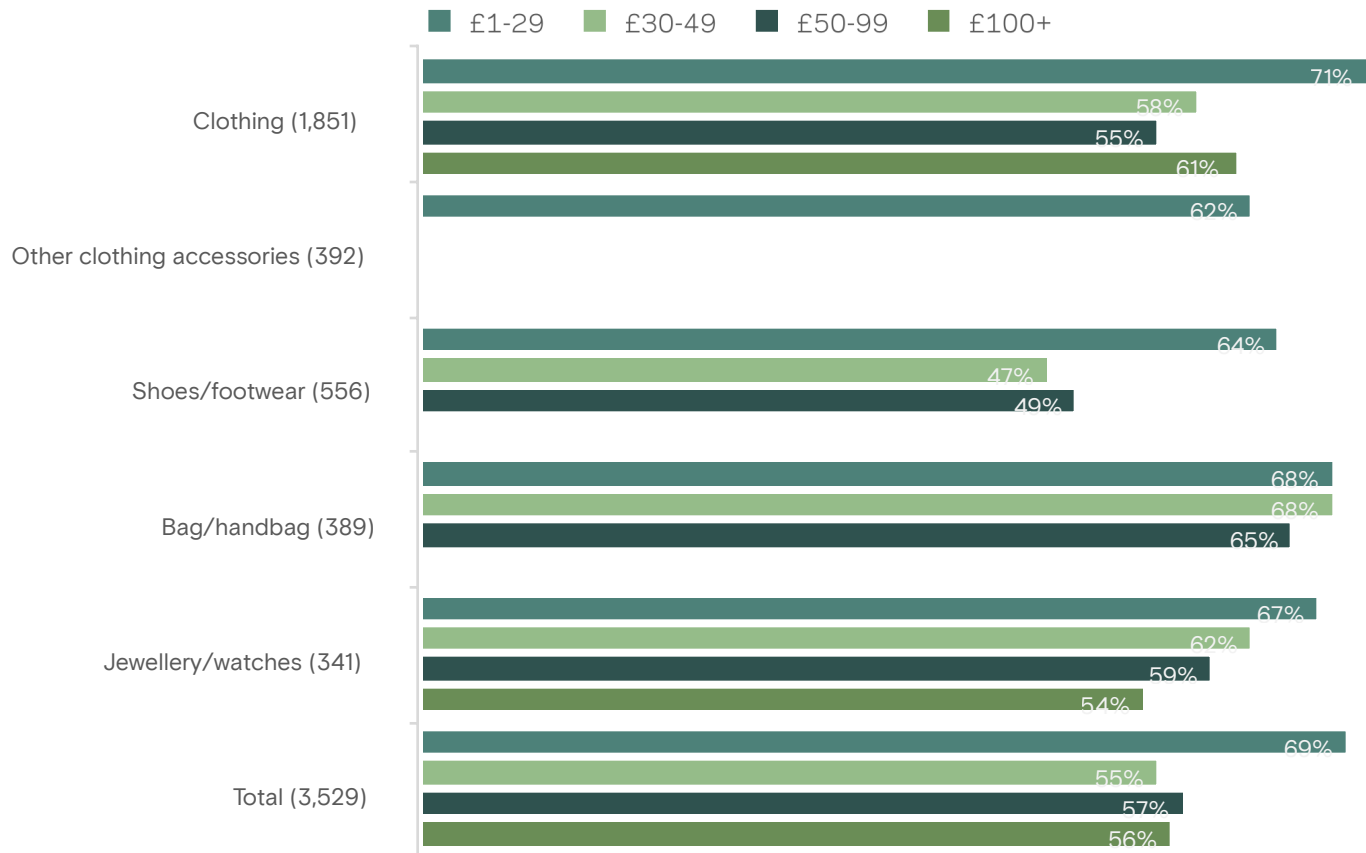
BASE = ITEMS. E.G. IN THE US THE AVERAGE DISPLACEMENT RATE FOR A BAG PURCHASED SECOND HAND/VINTAGE FOR \$1-29 IS 71%. NB: Some data points have insufficient sample sizes and are left blank.



Displacement rates by price paid – UK

This graph shows the average rate of displacement at different purchase prices, calculated using the methodology outlined on pages 8-11.

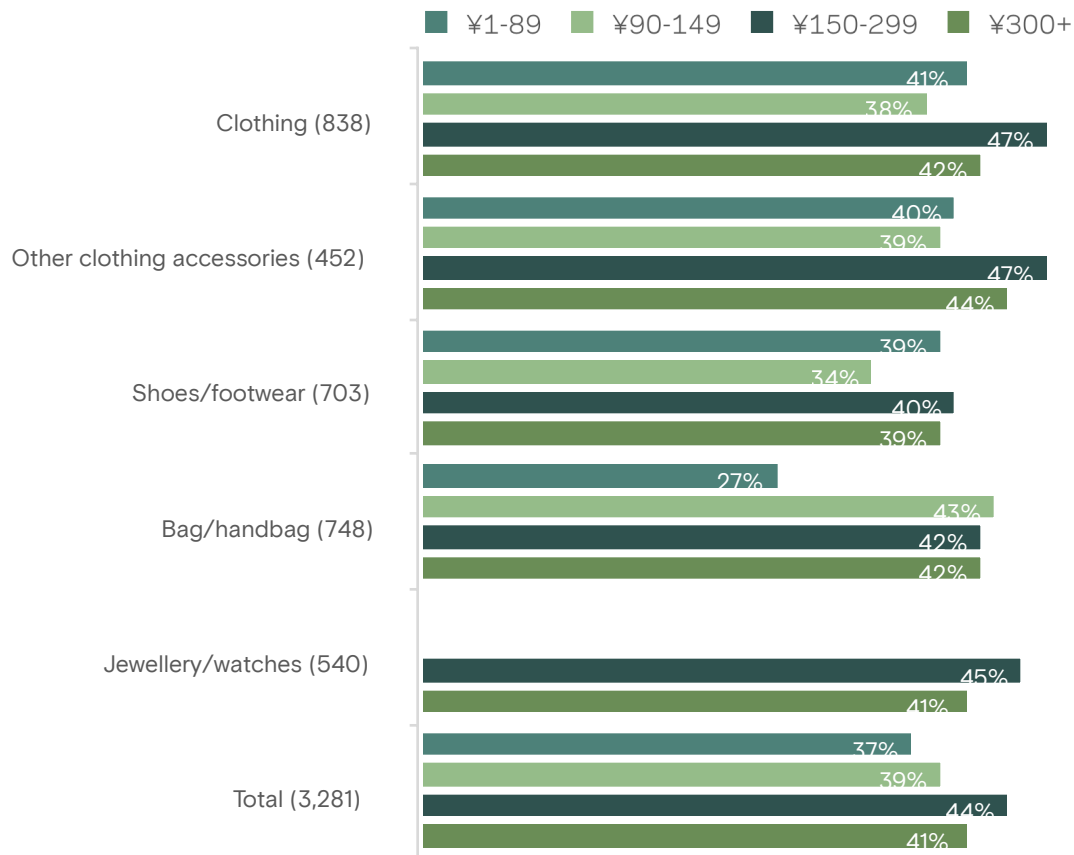
BASE = ITEMS. E.G. IN THE UK THE AVERAGE DISPLACEMENT RATE FOR A BAG PURCHASED SECOND HAND/VINTAGE FOR £1-29 IS 68%. NB: Some data points have insufficient sample sizes and are left blank.



Displacement rates by price paid – China

This graph shows the average rate of displacement at different purchase prices, calculated using the methodology outlined on pages 8-11.

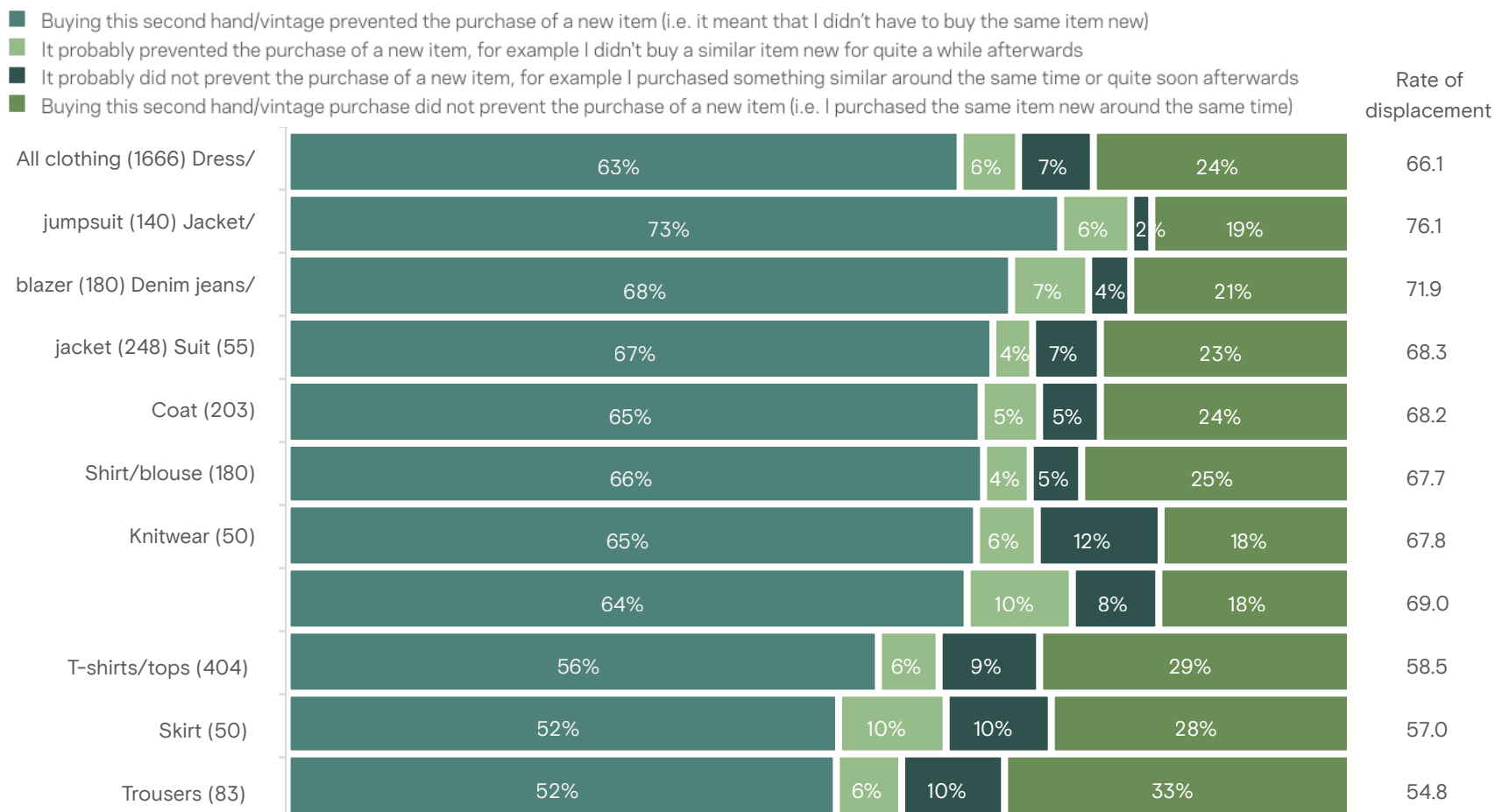
BASE = ITEMS. E.G. IN CHINA THE AVERAGE DISPLACEMENT RATE FOR A BAG PURCHASED SECOND HAND/VINTAGE FOR 1-89 YUAN IS 27%. NB: Some data points have insufficient sample sizes and are left blank.



Displacement – individual clothing items – US

Q14a/b. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 68.2% OF SECOND HAND/VINTAGE SUITS PURCHASED IN THE US IN 2019 PREVENTED THE PURCHASE OF A NEW ITEM. NB: Rate of displacement calculation on the right, calculates the overall displacement based on the methodology outlined on pages 8-11.

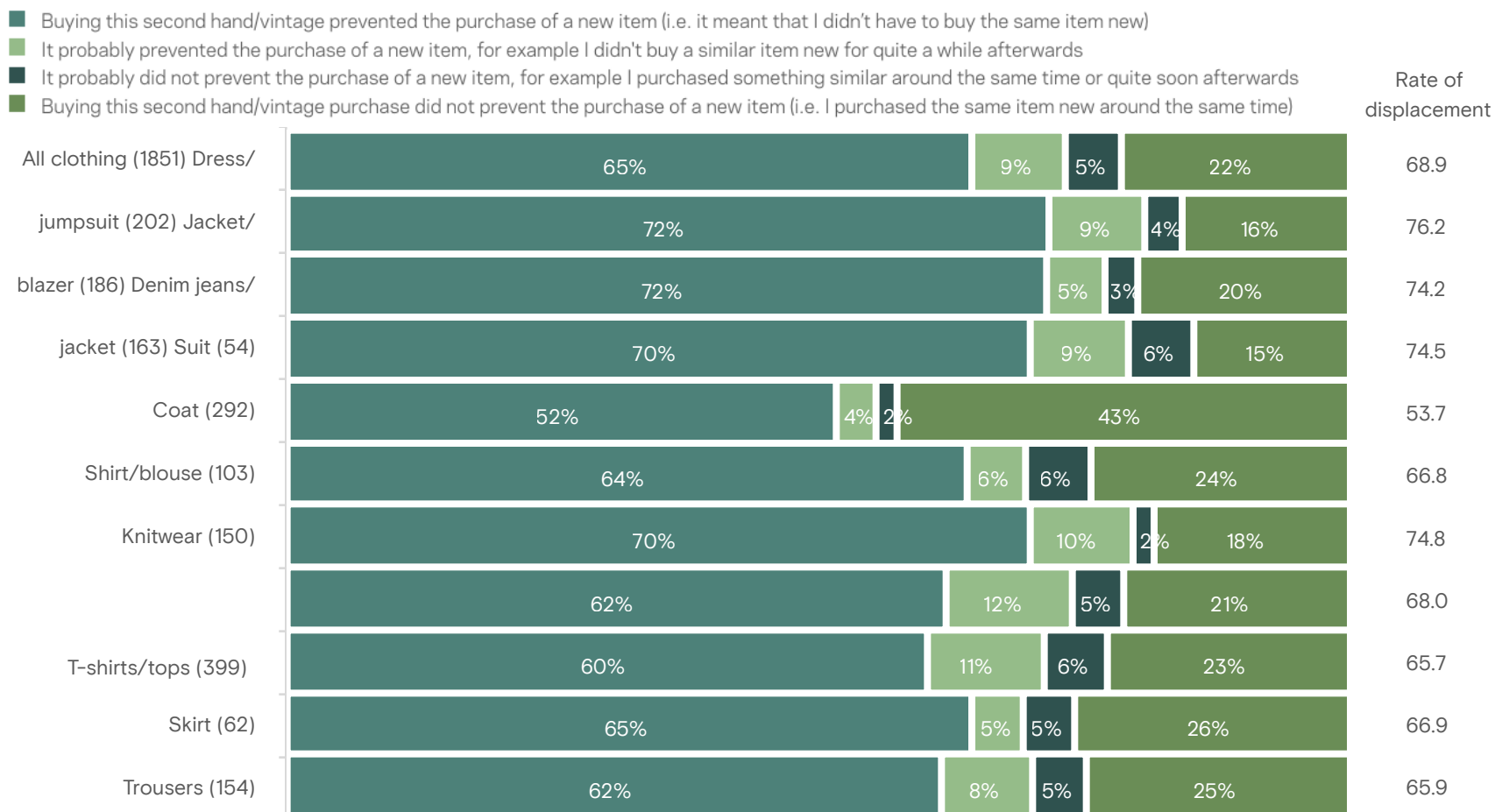


Base: Items purchased second hand/vintage for the respondent or someone in their home in the US (bases in brackets)

Displacement – individual clothing items – UK

Q14a/b. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 53.7% OF SECOND HAND/VINTAGE SUITS PURCHASED IN THE UK IN 2019 PREVENTED THE PURCHASE OF A NEW ITEM. NB: Rate of displacement calculation on the right, calculates the overall displacement based on the methodology outlined on page 8-11.



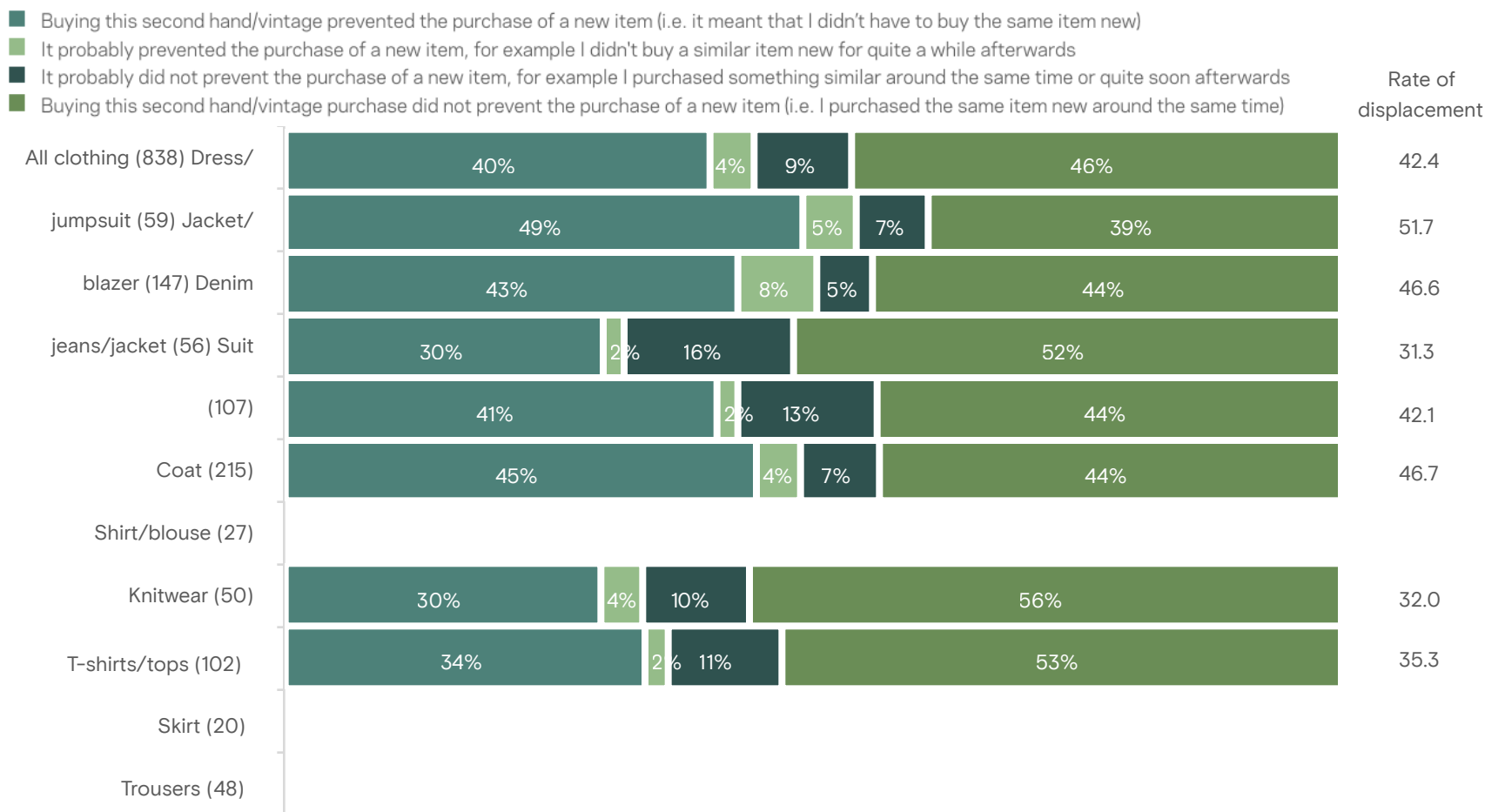
Base: Items purchased second hand/vintage for the respondent or someone in their home in the UK (bases in brackets)

Displacement – individual clothing items – China

Q14a/b. Which of the following statements best applies about each of the items?

BASE = ITEMS. E.G. 42.1% OF SECOND HAND/VINTAGE SUITS PURCHASED IN CHINA IN 2019 PREVENTED THE PURCHASE OF A NEW ITEM.

NB: Rate of displacement calculation on the right, calculates the overall displacement based on the methodology outlined on pages 8–11. Some data points have insufficient sample sizes and are left blank.



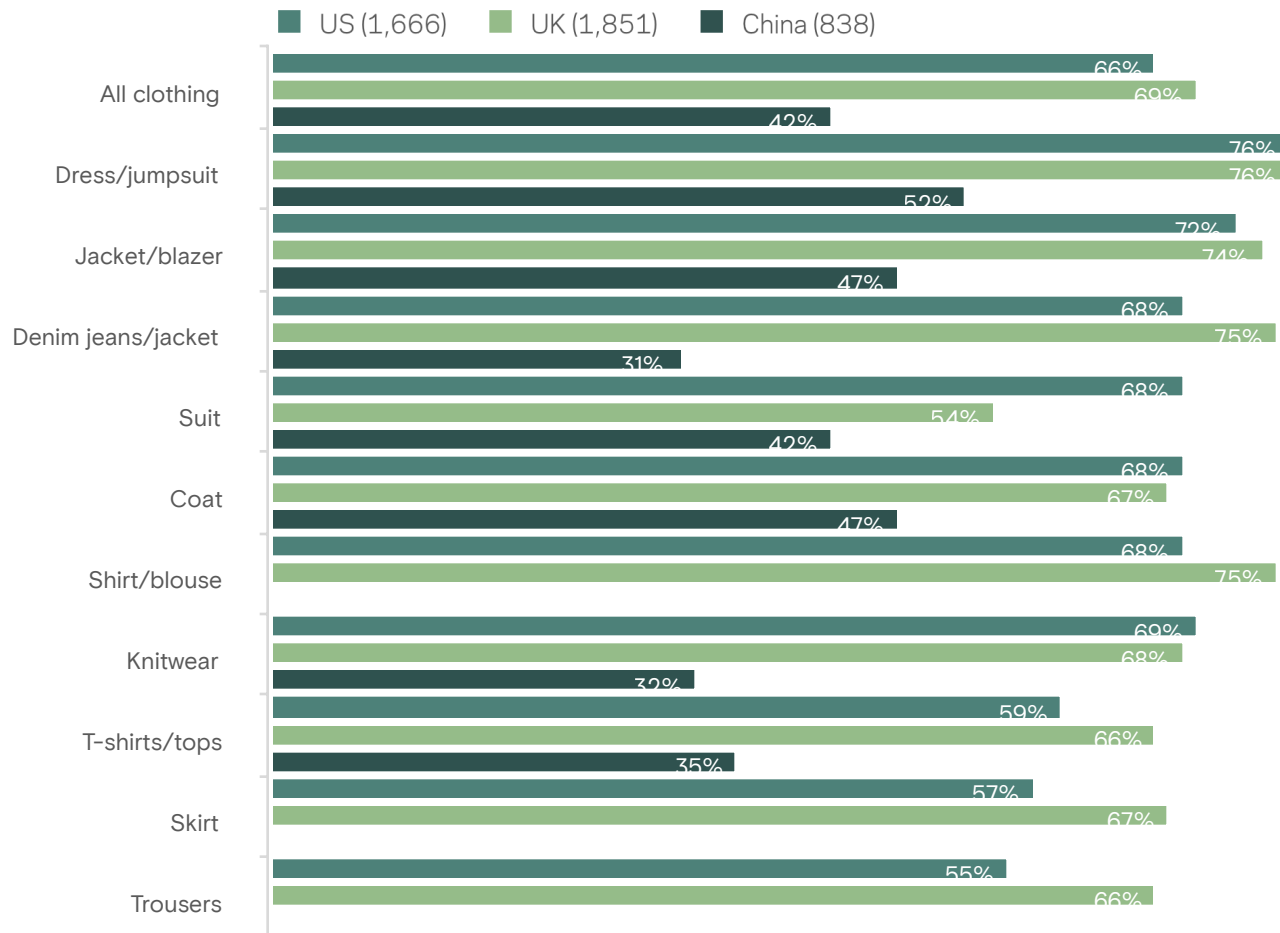
Base: Items purchased second hand/vintage for the respondent or someone in their home in China (bases in brackets)

Displacement rate – average

This graph shows the average rate of displacement across clothing items, calculated using the methodology outlined on pages 8-11.

BASE = ITEMS. E.G. THE AVERAGE RATE OF DISPLACEMENT FOR SUITS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 IS 68% – COMPARED TO 54% IN THE UK AND 42% IN CHINA.

NB: Some data points have insufficient sample sizes and are left blank.



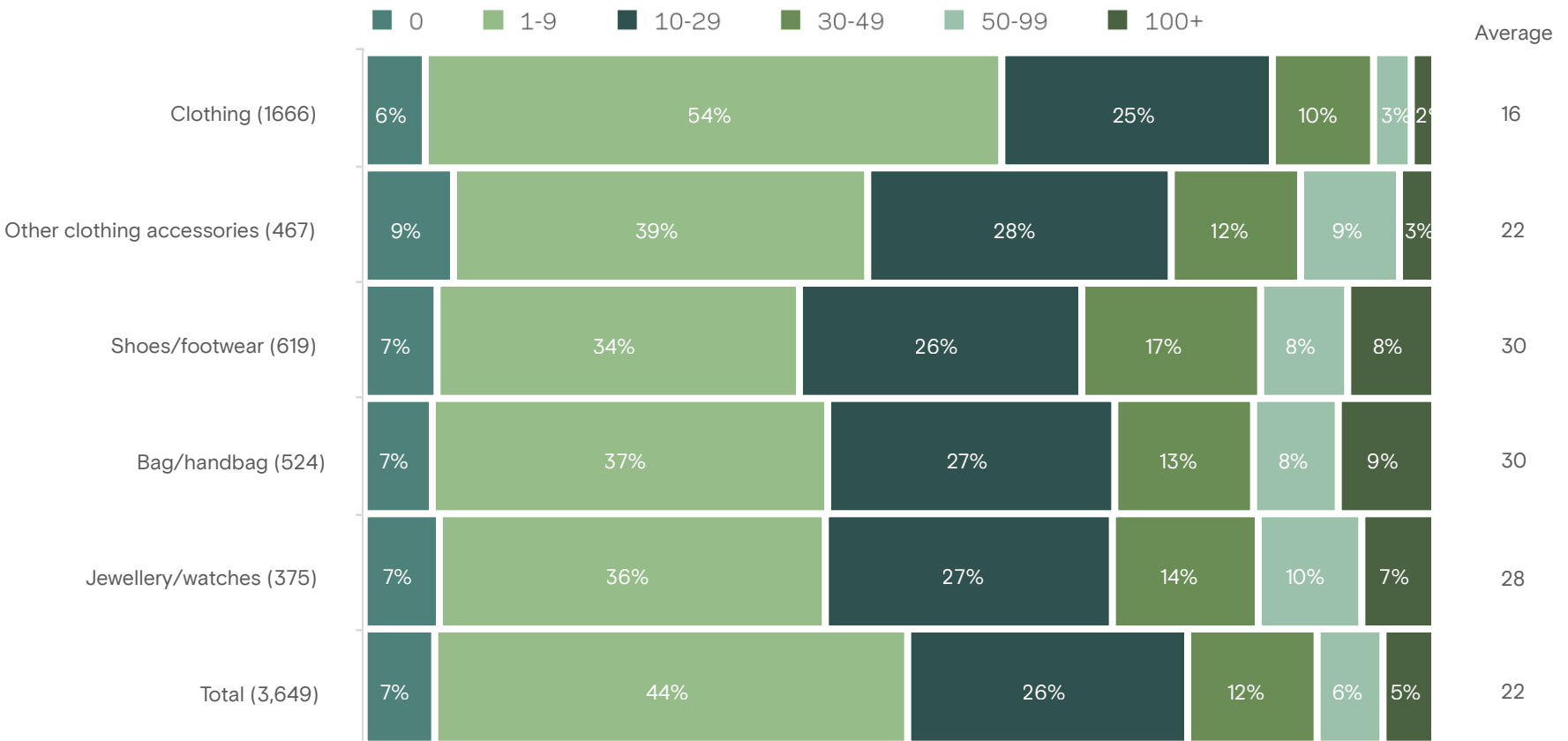
Base: Items purchased second hand/vintage for the respondent or someone in their home (bases in brackets)

Number of wears/uses so far - US

Q15. How many times has the item been worn/used so far?

BASE = ITEMS. E.G. 44% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 HAVE BEEN WORN/USED 1-9 TIMES SO FAR. NB: If

respondents selected 100+ for the average calculation it was assumed the item had been worn/used 150 times.

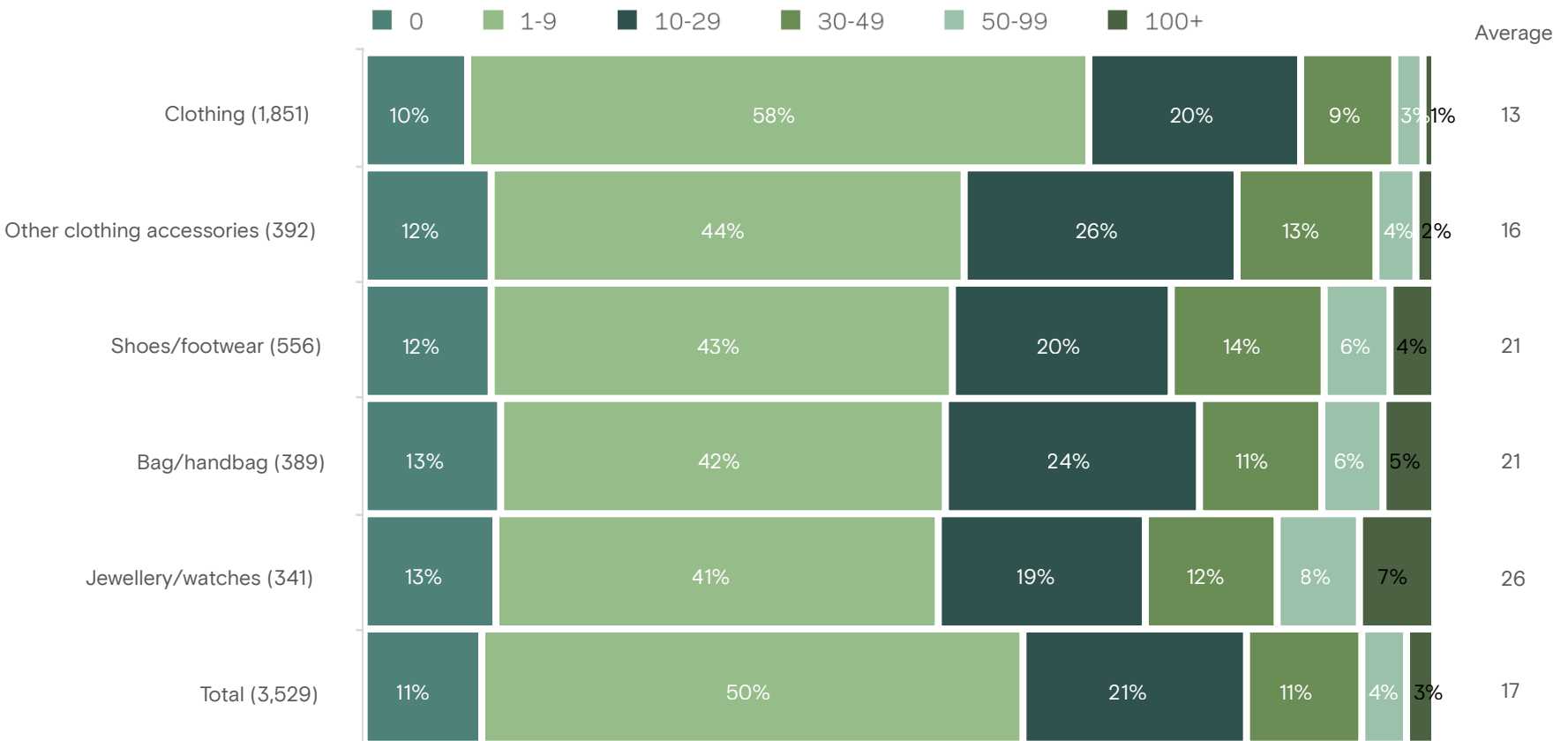


Number of wears/uses so far - UK

Q15. How many times has the item been worn/used so far?

BASE = ITEMS. E.G. 50% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 HAVE BEEN WORN/USED 1-9 TIMES SO FAR. NB: If

respondents selected 100+ for the average calculation it was assumed the item had been worn/used 150 times.

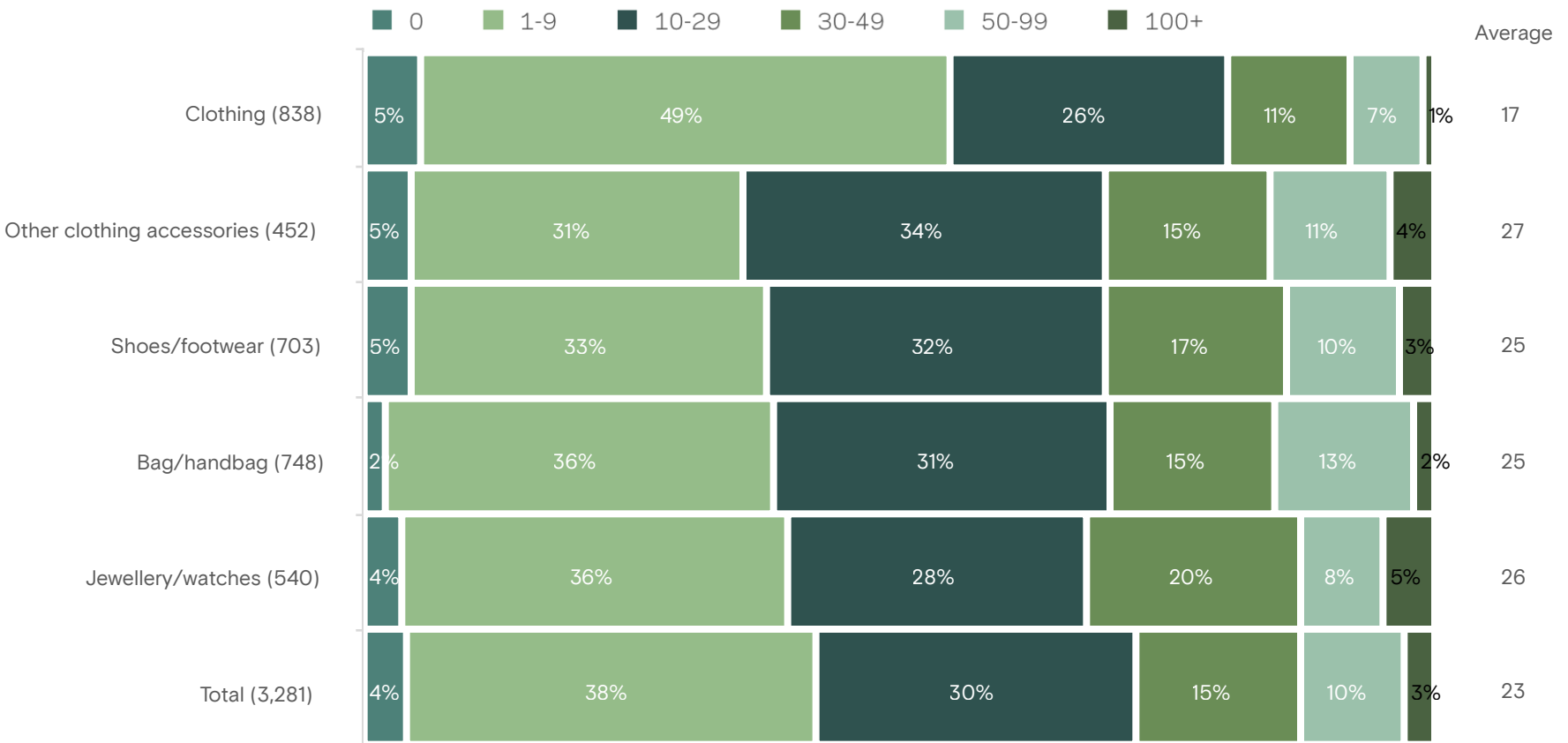


Number of wears/uses so far - China

Q15. How many times has the item been worn/used so far?

BASE = ITEMS. E.G. 38% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 HAVE BEEN WORN/USED 1-9 TIMES SO FAR. NB: If

respondents selected 100+ for the average calculation it was assumed the item had been worn/used 150 times.

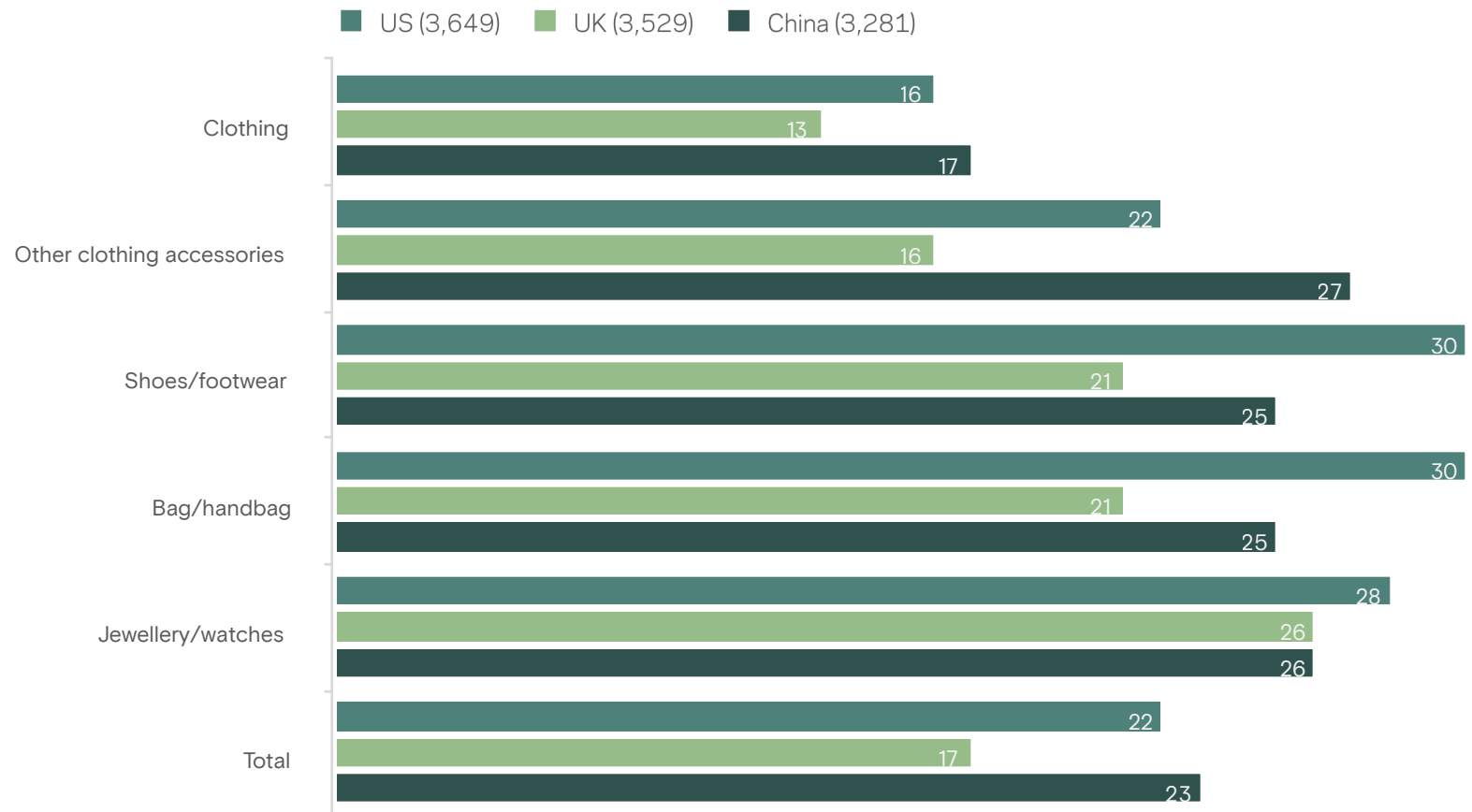


Number of wears/uses so far – averages

This graph shows the average number of wears/uses so far, since purchase.

BASE = ITEMS. E.G. SHOES/FOOTWEAR PURCHASED SECOND HAND/VINTAGE IN 2019 HAVE BEEN WORN ON AVERAGE 30 TIMES IN THE US, 21 TIMES IN THE UK AND 25 TIMES IN CHINA.

NB: If respondents selected 100+ for the average calculation it was assumed the item had been worn/used 150 times.

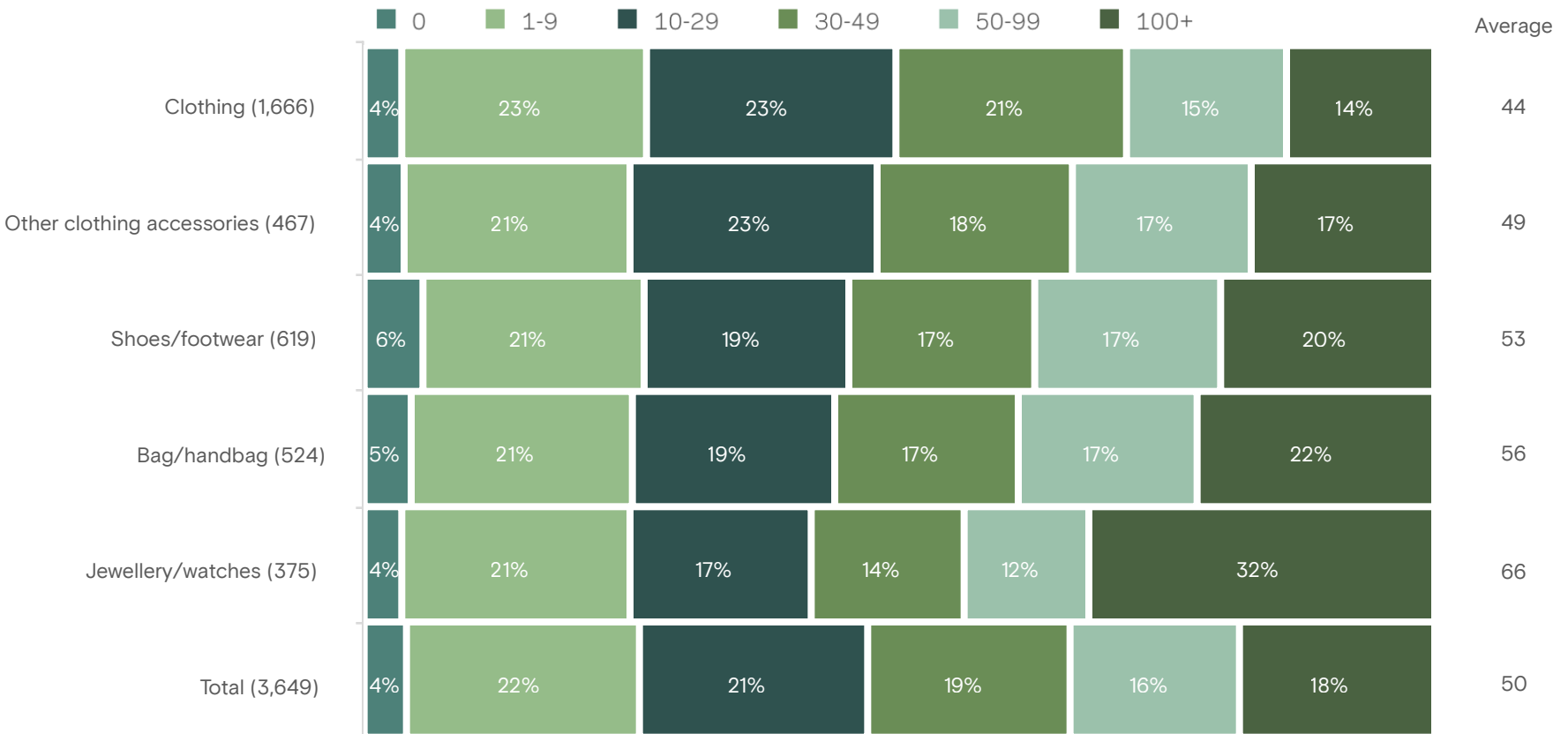


Predicted future wears/uses - US

Q16. And how many more times do you think the item will be worn/used before disposing of them?

BASE = ITEMS. E.G. 22% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 ARE ESTIMATED TO BE WORN/USED 1-9 MORE TIMES BEFORE THEY ARE DISPOSED OF.

NB: If respondents selected 100+ for the average calculation it was assumed the predicted future wears/uses would be 200 times.

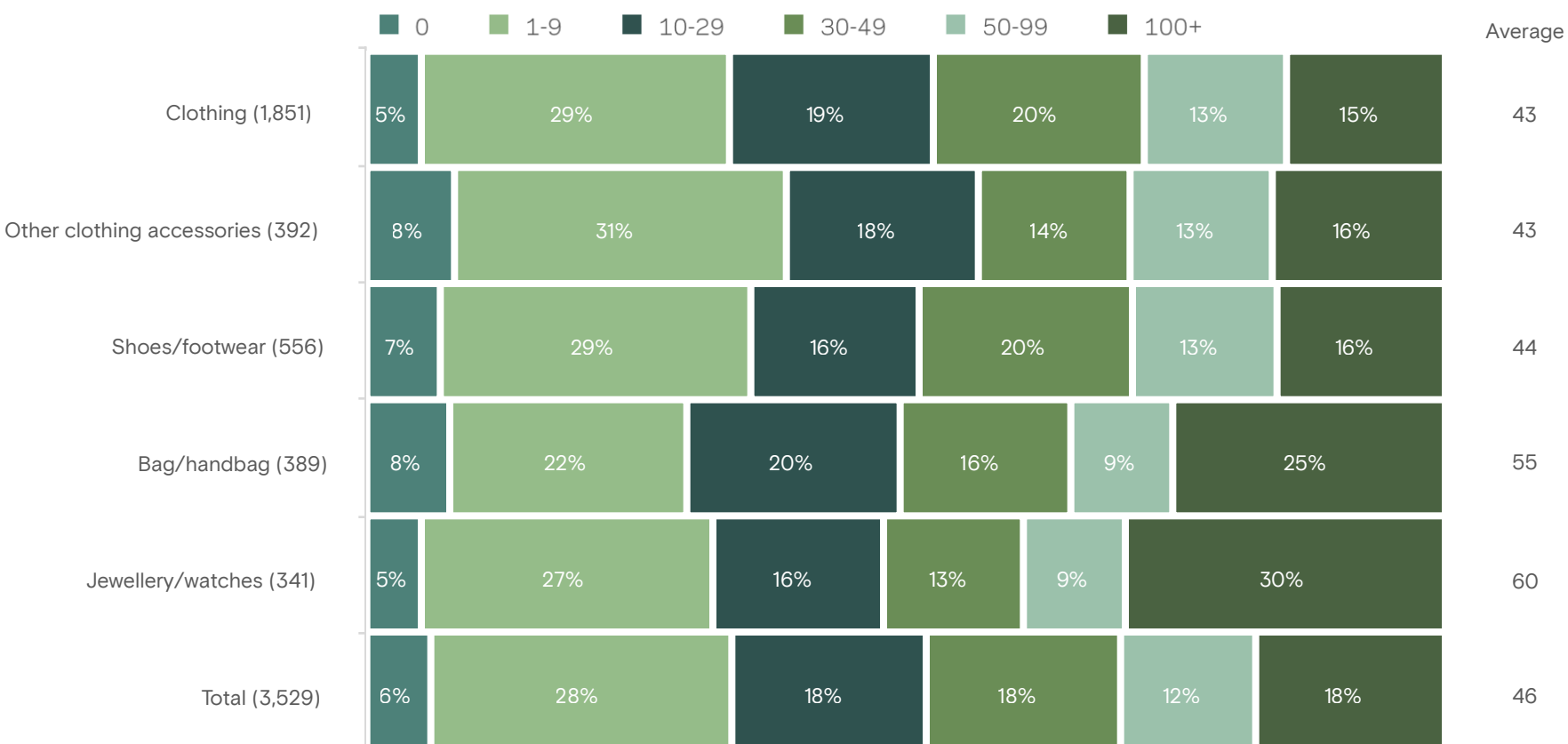


Predicted future wears/uses - UK

Q16. And how many more times do you think the item will be worn/used before disposing of them?

BASE = ITEMS. E.G. 28% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 ARE ESTIMATED TO BE WORN/USED 1-9 MORE TIMES BEFORE THEY ARE DISPOSED OF.

NB: If respondents selected 100+ for the average calculation it was assumed the predicted future wears/uses would be 200 times.

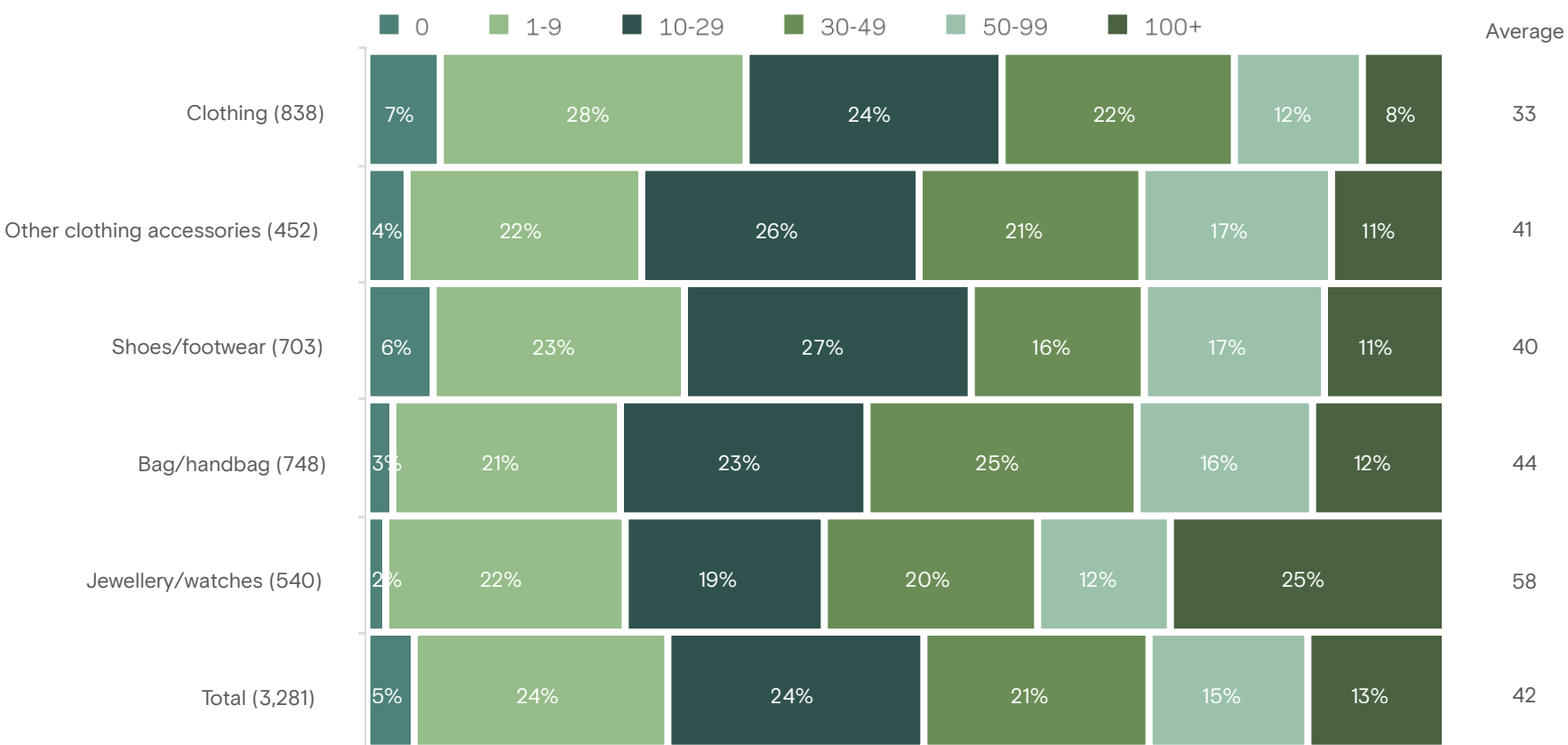


Predicted future wears/uses - China

Q16. And how many more times do you think the item will be worn/used before disposing of them?

BASE = ITEMS. E.G. 24% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 ARE ESTIMATED TO BE WORN/USED 1-9 MORE TIMES BEFORE THEY ARE DISPOSED OF.

NB: If respondents selected 100+ for the average calculation it was assumed the predicted future wears/uses would be 200 times.

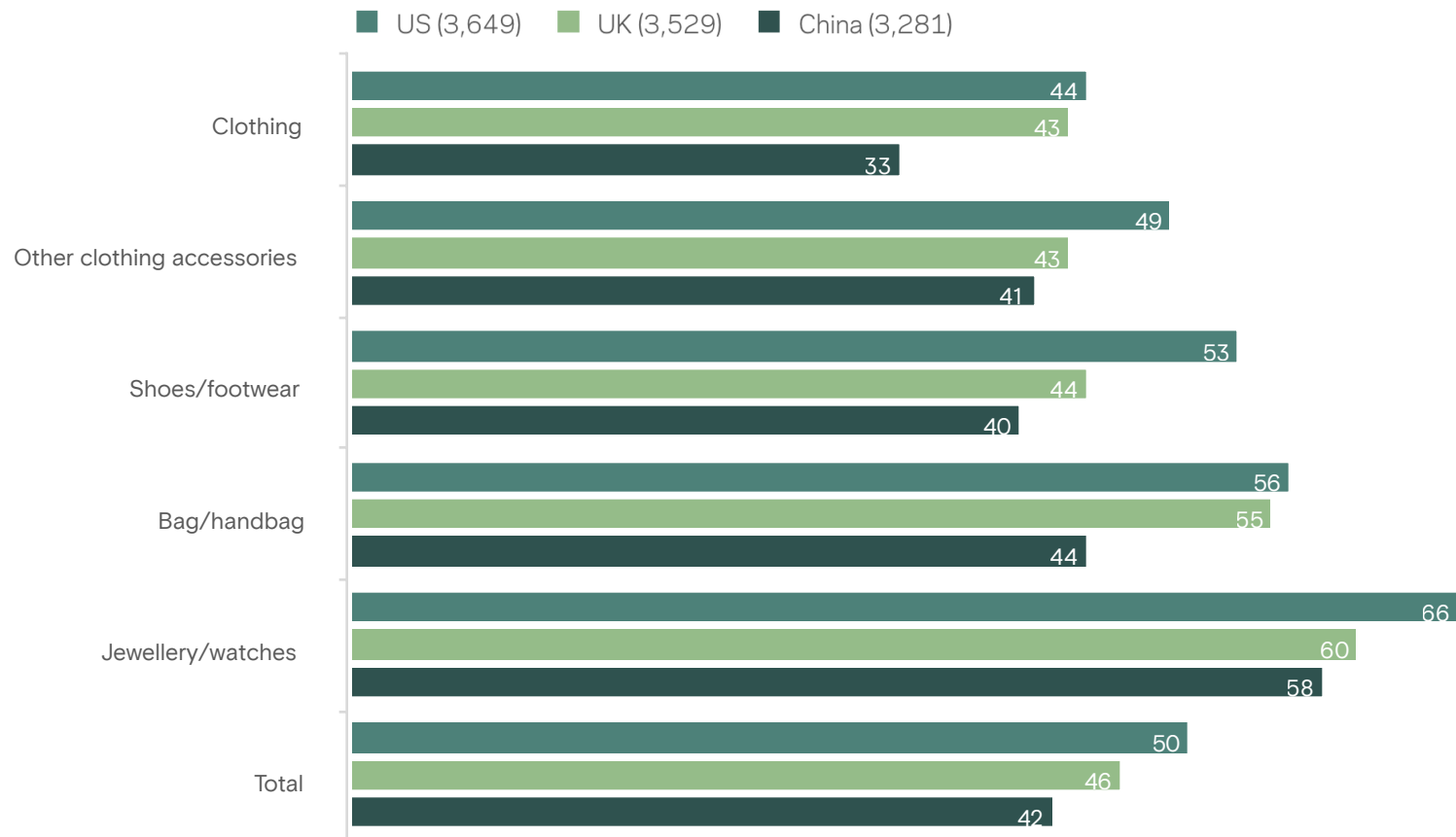


Predicted future wears/uses – averages

This graph shows the average estimated number of future wears/uses before the item is disposed of.

BASE = ITEMS. E.G. SHOES/FOOTWEAR PURCHASED SECOND HAND/VINTAGE IN 2019 ARE ESTIMATED TO BE WORN ON AVERAGE 53 MORE TIMES IN THE US, 44 MORE TIMES IN THE UK AND 40 MORE TIMES IN CHINA.

NB: If respondents selected 100+ for the average calculation it was assumed the predicted future wears/uses would be 200 times.

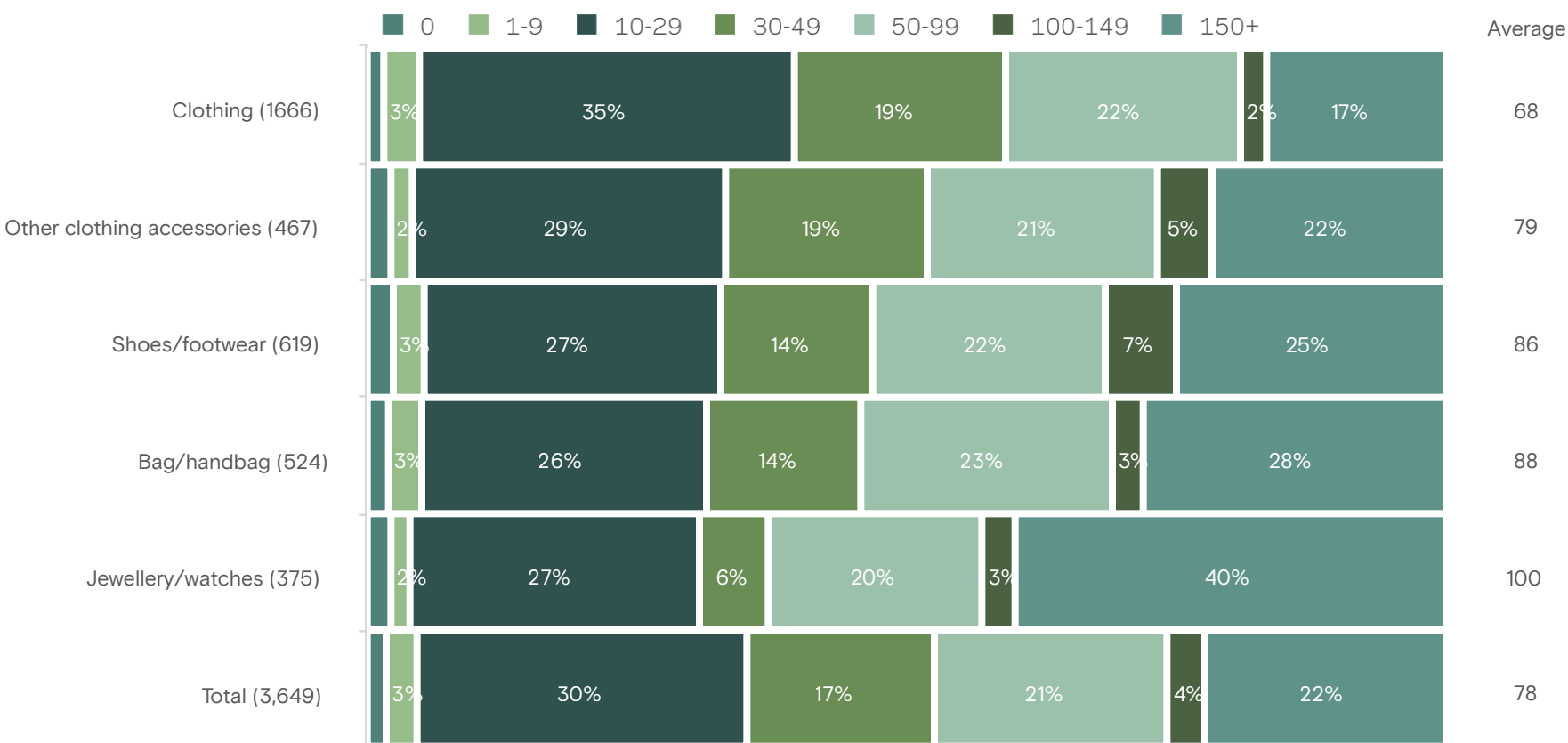


Total (past + predicted) wears/uses – US

Q15. How many times has the item been worn/used so far? + Q16. And how many more times do you think the item will be worn/used before disposing of them?

BASE = ITEMS. E.G. 3% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE US IN 2019 ARE ESTIMATED TO BE WORN/USED A TOTAL OF 1-9 TIMES BEFORE THEY ARE DISPOSED OF.

NB: If respondents selected 100+ for the number of times the item had been worn/used, it was assumed 150 times. If respondents selected 100+ predicted future wears/uses it was assumed it would be 200 times.

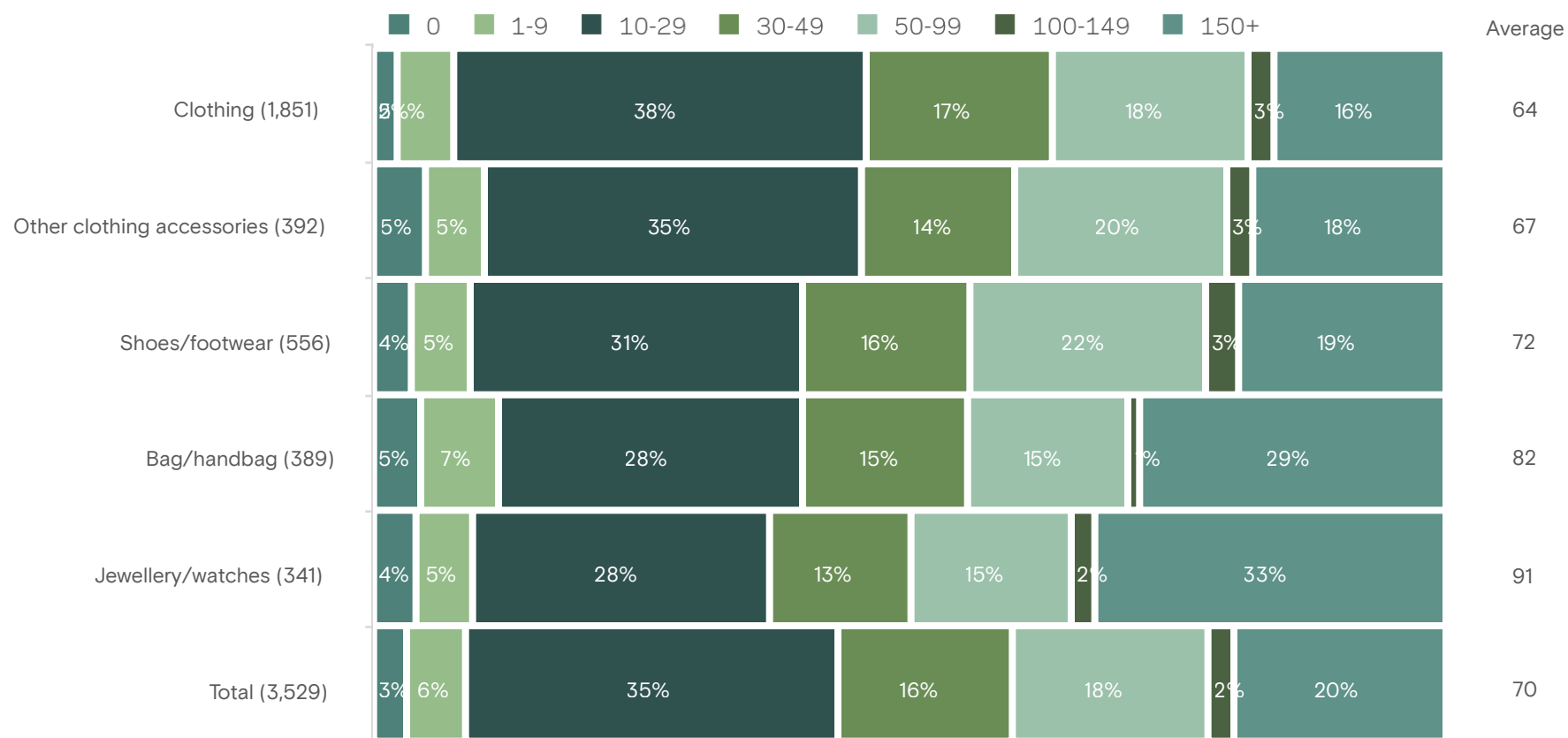


Total (past + predicted) wears/uses – UK

Q15. How many times has the item been worn/used so far? + Q16. And how many more times do you think the item will be worn/used before disposing of them?

BASE = ITEMS. E.G. 6% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN THE UK IN 2019 ARE ESTIMATED TO BE WORN/USED A TOTAL OF 1-9 TIMES BEFORE THEY ARE DISPOSED OF.

NB: If respondents selected 100+ for the number of times the item had been worn/used, it was assumed 150 times. If respondents selected 100+ predicted future wears/uses it was assumed it would be 200 times.

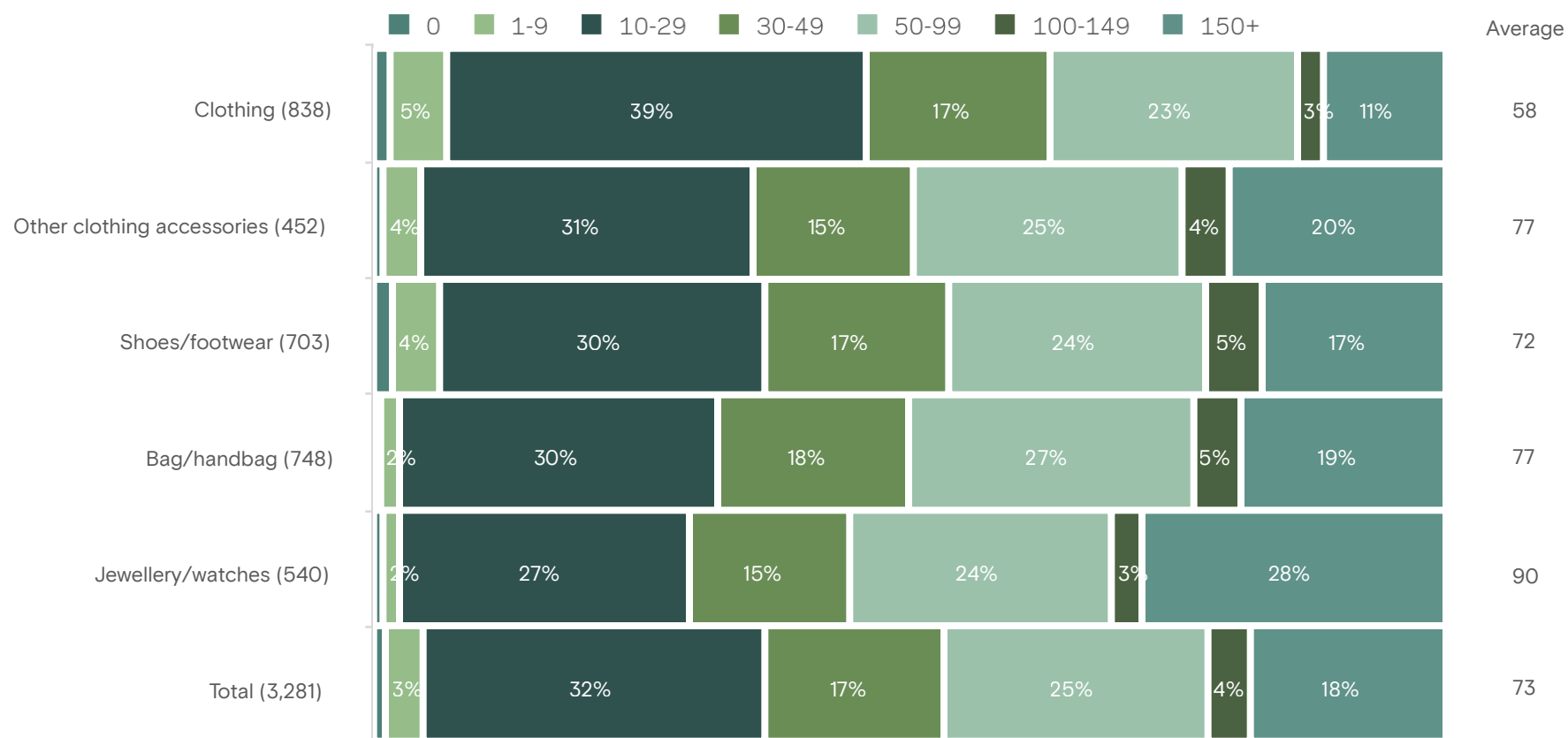


Total (past + predicted) wears/uses – China

Q15. How many times has the item been worn/used so far? + Q16. And how many more times do you think the item will be worn/used before disposing of them?

BASE = ITEMS. E.G. 3% OF ALL ITEMS PURCHASED SECOND HAND/VINTAGE IN CHINA IN 2019 ARE ESTIMATED TO BE WORN/USED A TOTAL OF 1-9 TIMES BEFORE THEY ARE DISPOSED OF.

NB: If respondents selected 100+ for the number of times the item had been worn/used, it was assumed 150 times. If respondents selected 100+ predicted future wears/uses it was assumed it would be 200 times.

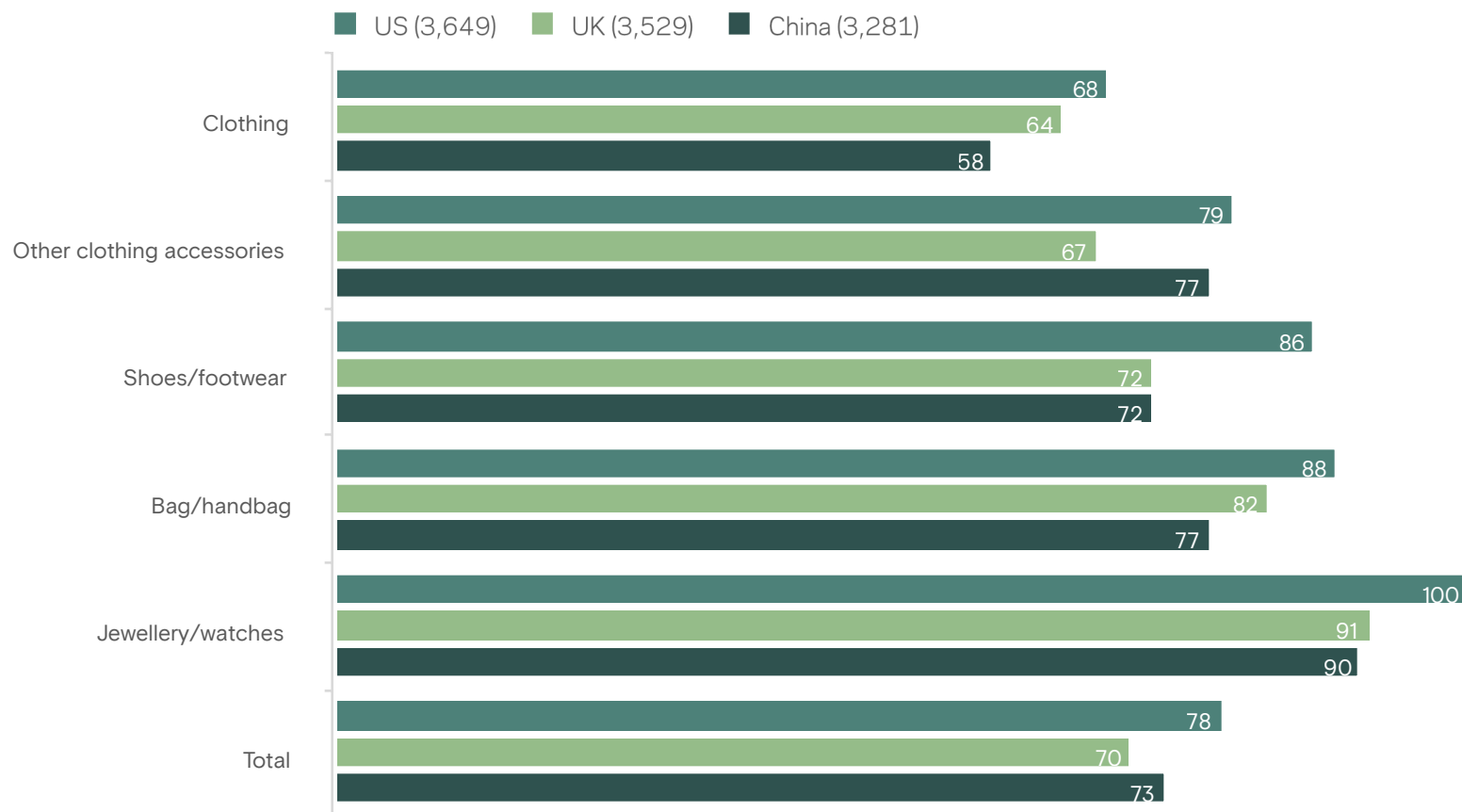


Total (past + predicted) wears – averages

This graph shows the average estimated number of wears/uses before disposal.

BASE – ITEMS. E.G. OF ALL THE ITEMS PURCHASED SECOND HAND/VINTAGE IN 2019, THE AVERAGE NUMBER OF ESTIMATED WEARS/USES IS 78 IN THE US, 70 IN THE UK AND 73 IN CHINA.

NB: If respondents selected 100+ for the number of times the item had been worn/used, it was assumed 150 times. If respondents selected 100+ predicted future wears/uses it was assumed it would be 200 times.

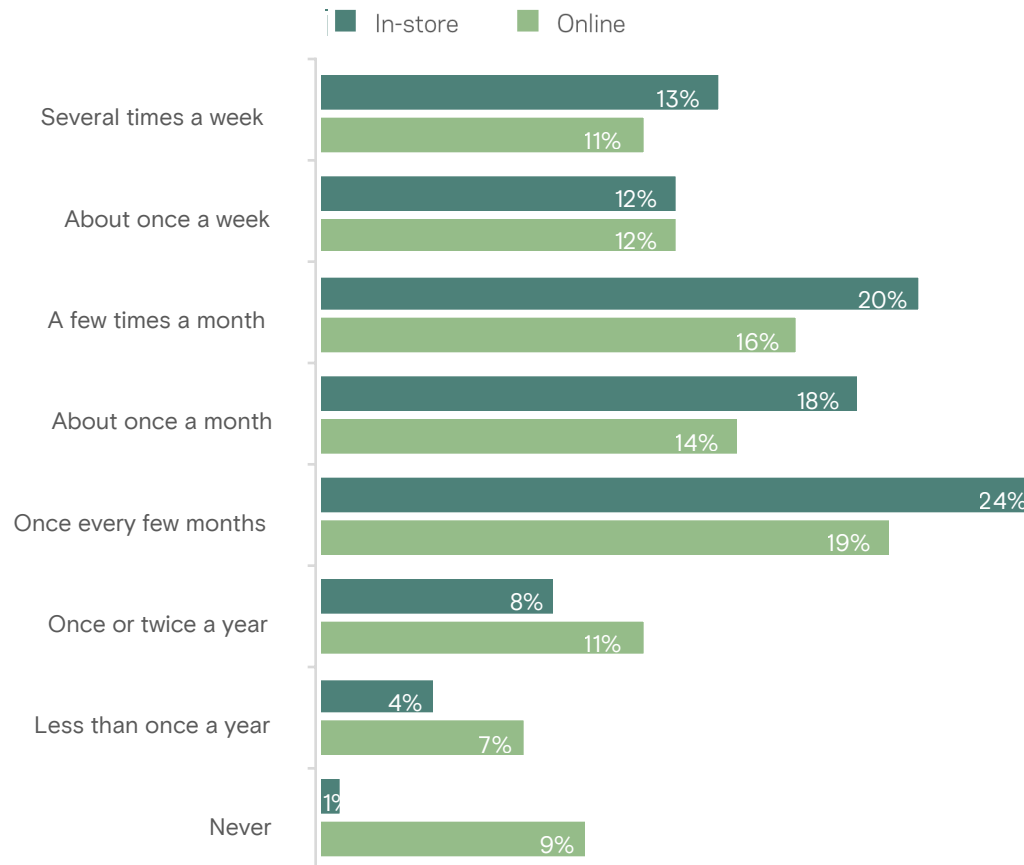


6. Understanding the wider context

Frequency of clothing purchase - US

Q17. Overall, how frequently do you purchase clothes for yourself...?

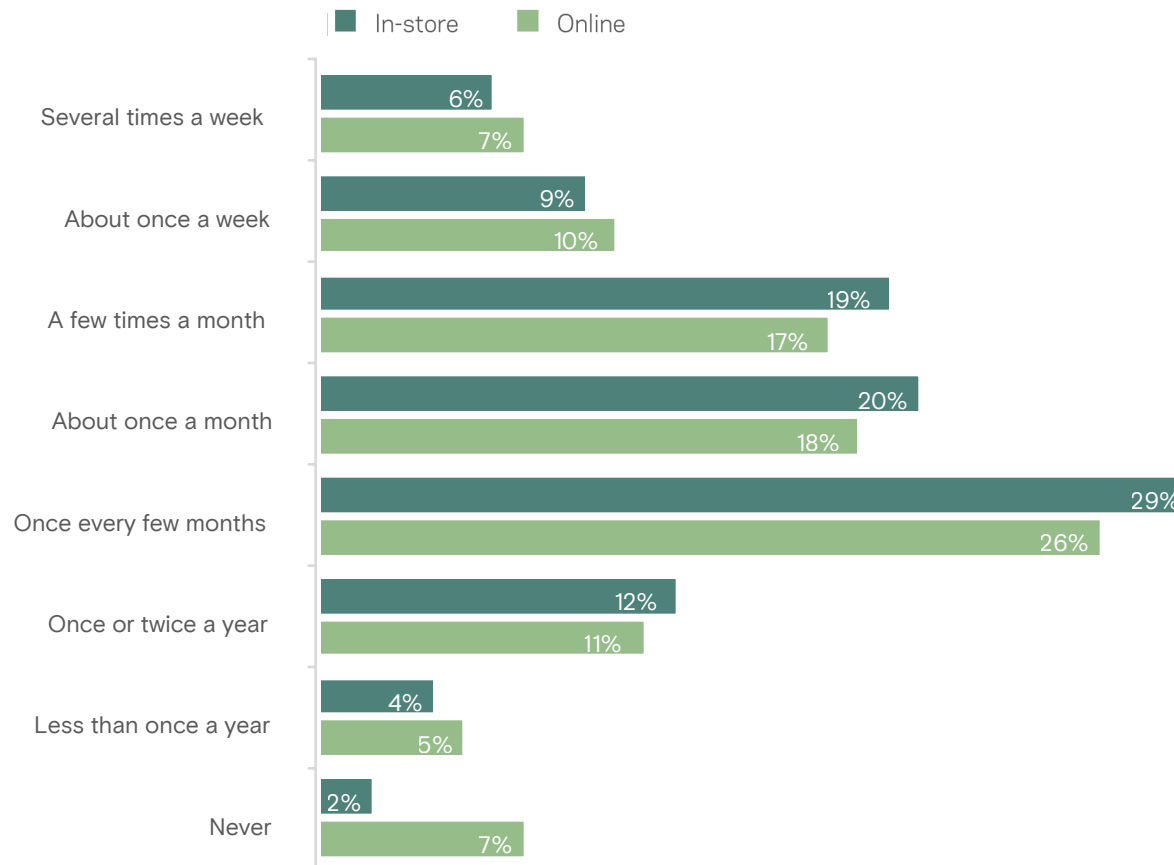
BASE = CONSUMERS. E.G. 13% OF CONSUMERS IN THE US SHOP SEVERAL TIMES A WEEK IN STORE FOR CLOTHES.



Frequency of clothing purchase - UK

Q17. Overall, how frequently do you purchase clothes for yourself...?

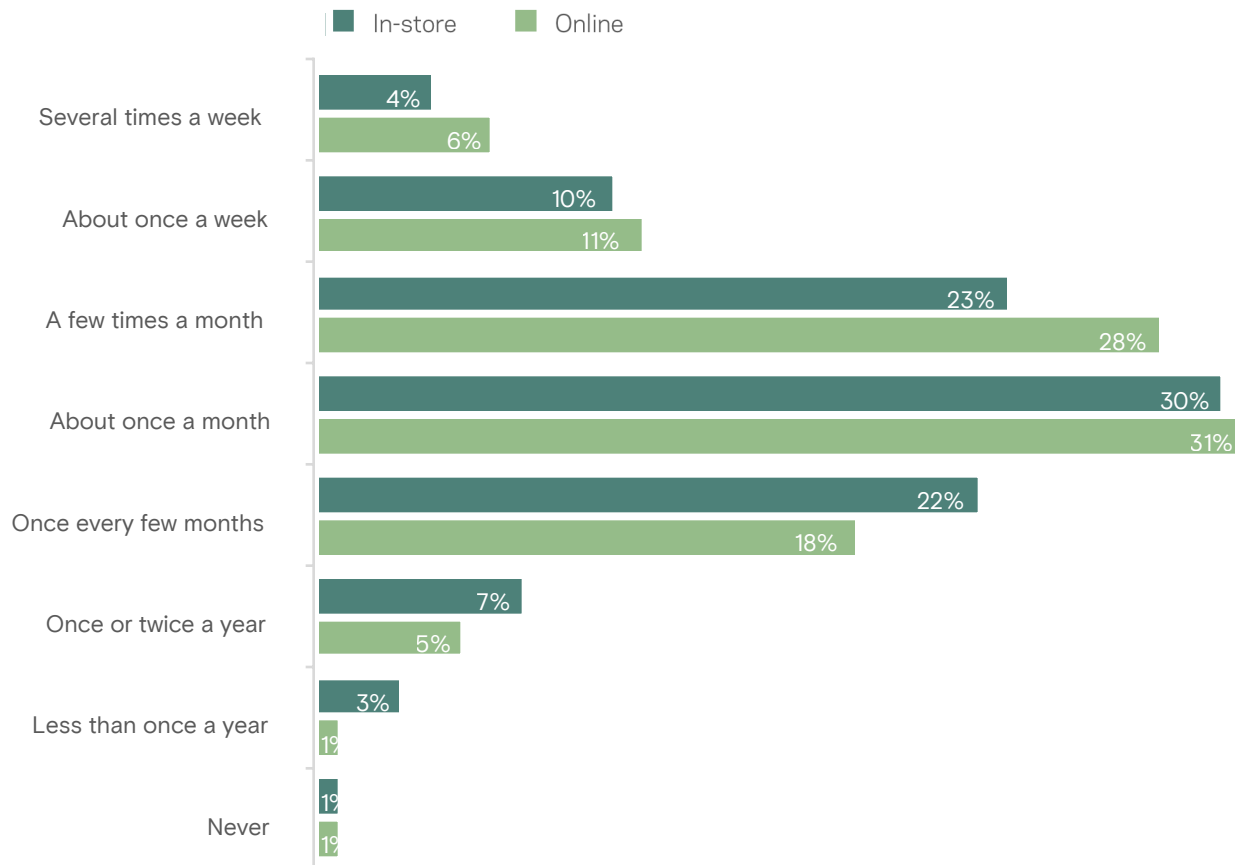
BASE = CONSUMERS. E.G. 6% OF CONSUMERS IN THE UK SHOP SEVERAL TIMES A WEEK IN STORE FOR CLOTHES.



Frequency of clothing purchase – China

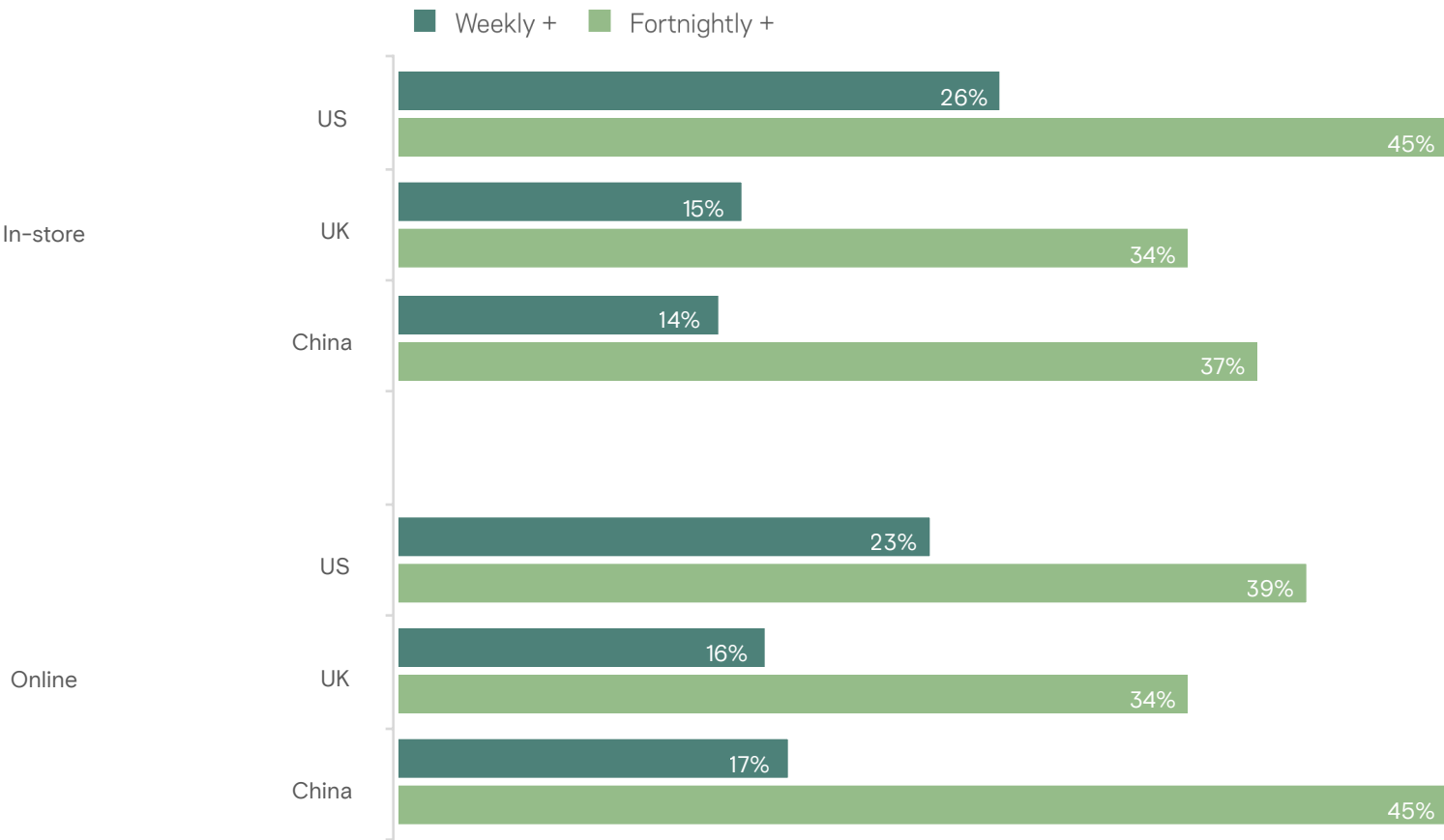
Q17. Overall, how frequently do you purchase clothes for yourself...?

BASE = CONSUMERS. E.G. 4% OF CONSUMERS IN THE CHINA SHOP SEVERAL TIMES A WEEK IN STORE FOR CLOTHES.



Frequency of clothing purchase – overall

Q17. Overall, how frequently do you purchase clothes for yourself...?

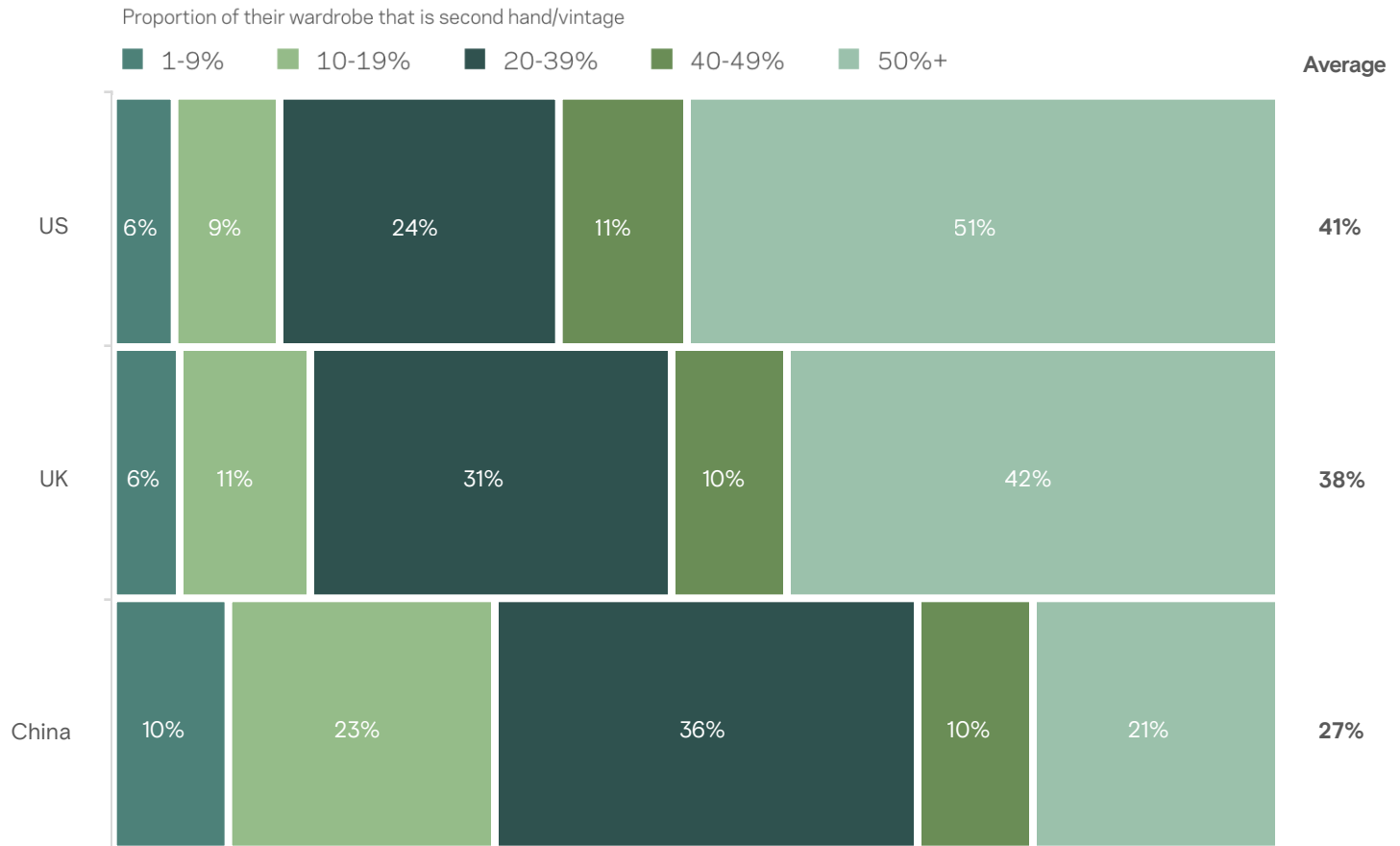


Base: 1,000 respondents per market who have purchased second hand/vintage

Proportion of wardrobe second hand/vintage

Q20. Thinking now about all the clothes that you currently own. Please estimate a percentage to each of the following to describe how your wardrobe is made-up: Clothes that were second hand/vintage when you acquired them. Your best estimate is fine.

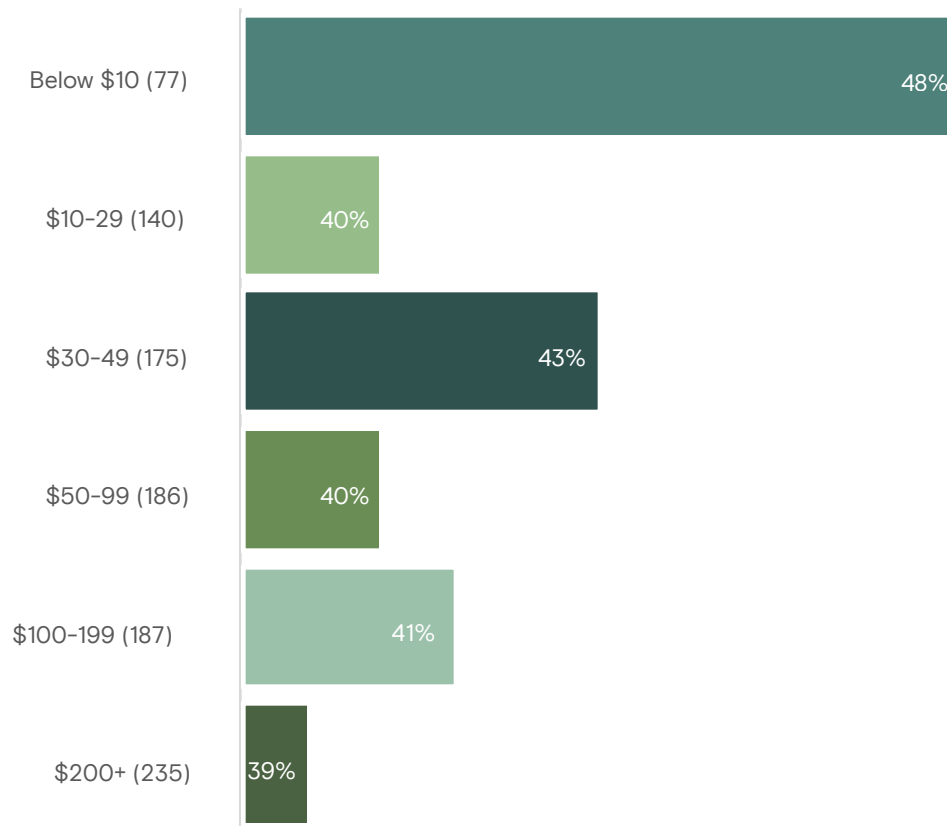
BASE = CONSUMERS. E.G. 11% OF CONSUMERS IN THE US SAMPLE ESTIMATE 40-49% THEIR WARDROBE IS MADE UP OF SECOND HAND/VINTAGE CLOTHES (VS. 10% IN THE UK AND 10% IN CHINA).



Proportion of wardrobe second hand/vintage – by average monthly spend on clothing – US

Q20. Thinking now about all the clothes that you currently own. Please estimate a percentage to each of the following to describe how your wardrobe is made-up: Clothes that were second hand/vintage when you acquired them. Your best estimate is fine.

BASE = CONSUMERS. E.G. 48% OF US CONSUMERS WITH AN AVERAGE MONTHLY CLOTHING SPEND OF BELOW \$10 ESTIMATE THAT OVER HALF THEIR WARDROBE IS MADE UP OF SECOND HAND/VINTAGE CLOTHES.



Base: Respondents who have purchased second hand/vintage in the US (base in brackets)

Proportion of wardrobe second hand/vintage – by average monthly spend on clothing – UK

Q20. Thinking now about all the clothes that you currently own. Please estimate a percentage to each of the following to describe how your wardrobe is made-up: Clothes that were second hand/vintage when you acquired them. Your best estimate is fine.

BASE = CONSUMERS. E.G. 40% OF UK CONSUMERS WITH AN AVERAGE MONTHLY CLOTHING SPEND OF BELOW £10 ESTIMATE THAT OVER HALF THEIR WARDROBE IS MADE UP OF SECOND HAND/ VINTAGE CLOTHES.



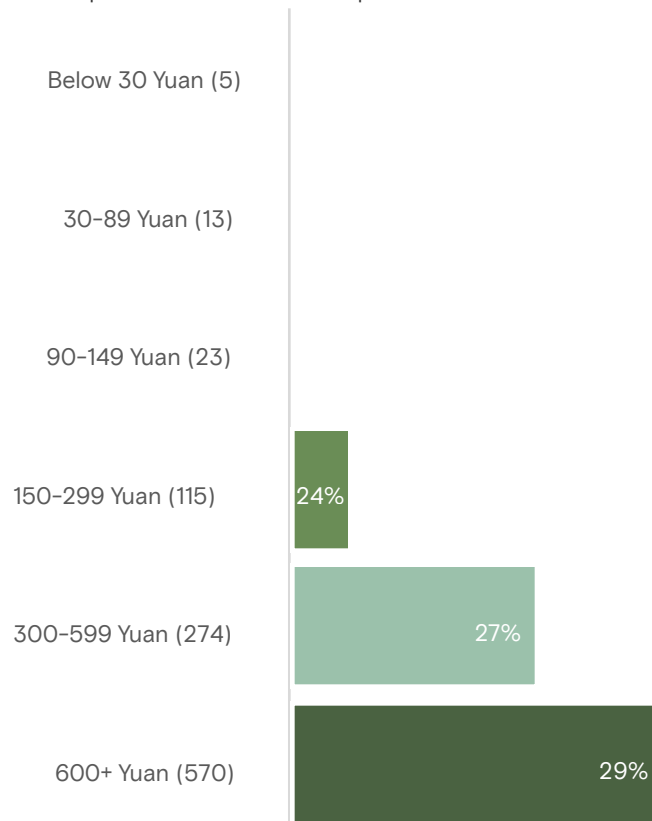
Base: Respondents who have purchased second hand/vintage in the UK (base in brackets)

Proportion of wardrobe second hand/vintage – by average monthly spend on clothing – China

Q20. Thinking now about all the clothes that you currently own. Please estimate a percentage to each of the following to describe how your wardrobe is made-up: Clothes that were second hand/vintage when you acquired them. Your best estimate is fine.

BASE = CONSUMERS. E.G. 29% OF CHINESE CONSUMERS IN THE SAMPLE WITH AN AVERAGE MONTHLY CLOTHING SPEND OF 600+ YUAN ESTIMATE THAT OVER HALF THEIR WARDROBE IS MADE UP OF SECOND HAND/VINTAGE CLOTHES.

NB: Some data points have insufficient sample sizes and are left blank.

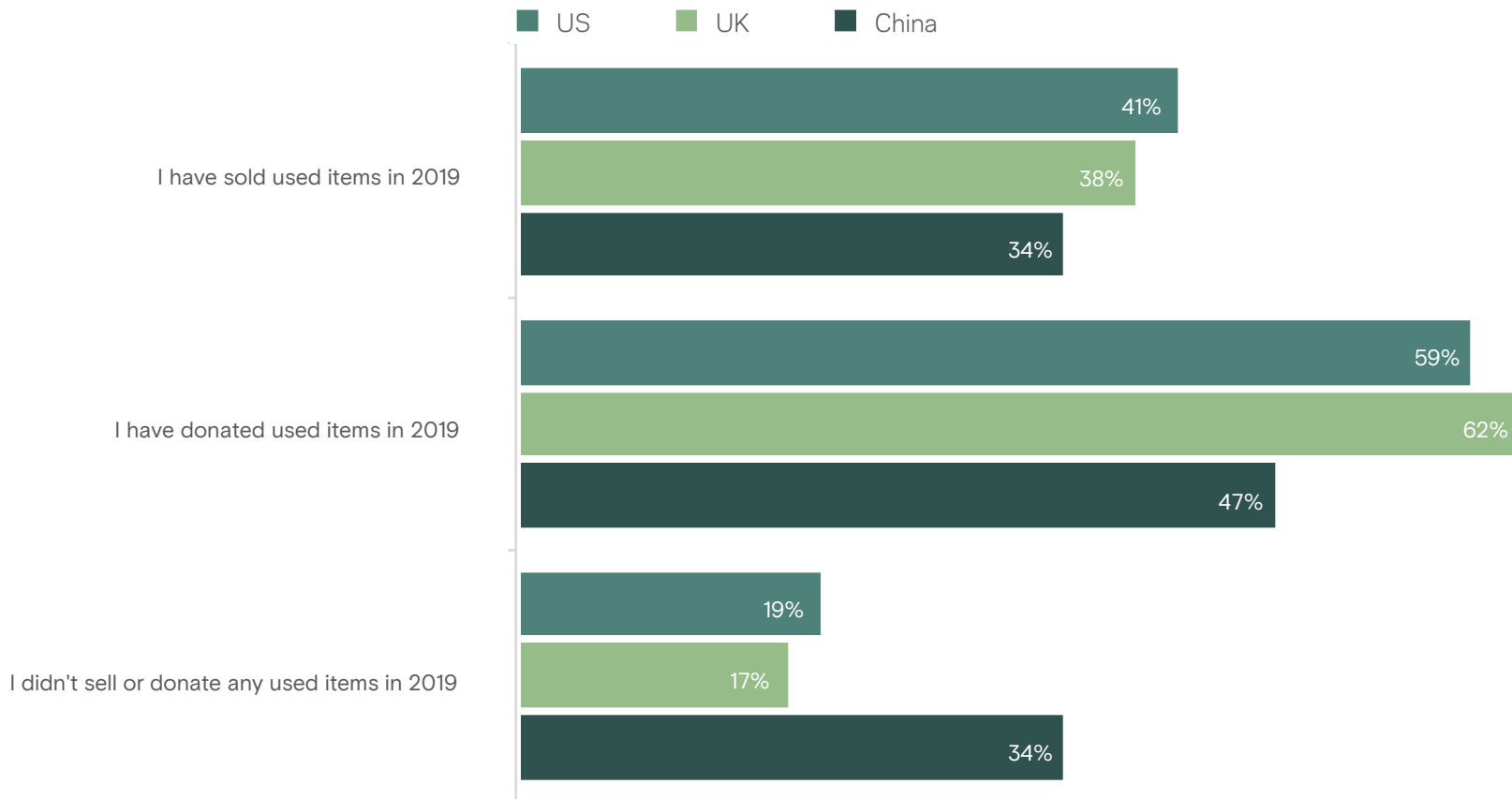


Base: Respondents who have purchased second hand/vintage in the China (base in brackets)

Sales/donation behaviour

Q19. In 2019 so far, have you sold or donated any of the following used clothing second hand, vintage or 'pre-loved' – whether in a store or online? Please include items that you wore or used yourself as well as items used by someone else.

BASE = CONSUMERS. E.G. 41% OF CONSUMERS IN THE US SAMPLE HAVE SOLD ITEMS IN 2019, 59% HAVE DONATED ITEMS IN 2019 AND 81% HAVE DONE AT LEAST ONE OF THESE BEHAVIOURS.



Environmental Data Sources

Full list of environmental impact data sources

Below is a list of all the sources used when calculating the carbon, water and waste impacts per material.

Environmental Impacts (carbon, water, waste)	
Source	Reference
1	http://www.wrap.org.uk/sites/files/wrap/10.7.12%20VOC-%20FINAL.pdf
2	https://leatherpanel.org/sites/default/files/publications-attachments/leather_carbon_footprint_p.pdf
3	https://quantis-intl.com/wp-content/uploads/2018/03/measuringfashion_globalimpactstudy_full-report_quantis_cwf_2018a.pdf
4	http://www.worldstainless.org/Files/issf/non-image-files/PDF/ISSF_Stainless_steel_and_CO2.pdf
5	http://ec.europa.eu/environment/integration/research/newsalert/pdf/302na5_en.pdf
6	https://www.carbontrust.com/media/38362/ctc791-international-carbon-flows-steel.pdf
7	https://www.kering.com/en/sustainability/resources/
8	http://www.ecap.eu.com/wp-content/uploads/2018/07/Mapping-clothing-impacts-in-Europe.pdf
9	https://ceowatermandate.org/resources/glasa-state-of-the-apparel-sector-report-2015/
10	https://waterfootprint.org/en/resources/interactive-tools/product-gallery/
Garment weights	
	https://publications.jrc.ec.europa.eu/repository/bitstream/JRC85895/impro%20textiles_final%20report%20edited_pubsy%20web.pdf
Garment composition data	
	http://www.ecap.eu.com/wp-content/uploads/2018/07/Mapping-clothing-impacts-in-Europe.pdf
	https://publications.jrc.ec.europa.eu/repository/bitstream/JRC85895/impro%20textiles_final%20report%20edited_pubsy%20web.pdf

Environmental Impacts (carbon, water, waste)	
Source	Material type
1,9	Cotton
2,3,7,10	Leather
1	Polyester
1	Wool
1	Silk
6	Steel
4	Stainless steel
7, 5	Gold
1	Acrylic
1	Nylon
1	Viscose
7	Brass
1	Linen
7	Synth stones & sapphire glass
1	PU/PP/Lycra