

(16 APRIL 2020)

# THE IMMUNIZED SHOPPER

A WHITEPAPER ON THE POST-  
QUARANTINE CONSUMPTION HABITS  
OF THE NEW LUXURY CONSUMER

HIGHSNObIETY 01

**IN THE WEEKS FOLLOWING THE GLOBAL OUTBREAK OF COVID-19, IT BECAME CLEAR THAT THIS CRISIS WOULD NOT ONLY TEMPORARILY STALL THE ECONOMY AND UPEND OUR DAILY ROUTINE, IT WOULD ALSO RESCRAMBLE OUR CULTURE ENTIRELY.**

**WILL THE SAME THINGS MATTER TO US  
WHEN WE EMERGE FROM THIS THAW?**

**WILL THE AESTHETICS AND VALUES  
OF OUR CULTURE CHANGE?**

**AND WILL WE WANT THE SAME THINGS,  
EVEN WHEN STORES OPEN AGAIN?**

**IN ORDER TO GET A PULSE ON HOW OUR GENERATION'S  
RELATIONSHIP TO FASHION AND LUXURY HAS CHANGED,  
WE POLLED THE HIGHSNOBIETY AUDIENCE\* ABOUT HOW  
THEIR SPENDING HABITS, DESIRABILITY DRIVERS, AND  
RELATIONSHIP TO BRANDS HAVE BEEN AFFECTED BY THE  
COVID-19 PANDEMIC.**

\*About the research panel: n=400; 66 % male, 32 % female, 2 % non-binary, 75 % 18–34 years old; 41% North America, 44 % Europe, 12 % APAC, 3 % ROW

**IN THIS DATA, WE'VE FOUND AN EMERGENT VALUE SYSTEM BEING BORN IN SELF-ISOLATED APARTMENTS ACROSS THE WORLD: ONE THAT IS FOCUSED ON THE ESSENTIALS, ALLERGIC TO HYPE, AND, PERHAPS SURPRISINGLY, VERY OPTIMISTIC ABOUT THE FUTURE. INTERESTINGLY, THIS IMMUNITY TO CLASSIC DESIRABILITY-DRIVERS SEEMS TO EXTEND WAY BEYOND CRISIS MODE, AND INTO A NEW GENERATIONAL APPROACH TO THE WORLD. WE ASCRIBE THIS POV TO A CHARACTER WE CALL THE IMMUNIZED SHOPPER.**

**"SEEING THE WAY BRANDS HAVE REACTED  
TO THE SITUATION HAS OPENED MY EYES  
TO THEIR PRIORITIES."  
(HIGHSNOBIETY READER)**



# FASHION'S FIRST RESPONDERS

**If you told us three months ago that a New Balance N95 mask would be blowing up the Highsnobiety feed, we would have asked you what episode of National Geographic's 'Doomsday Preppers' you watched last night.**

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Yet today it is clear that brands have become (at least symbolically) first responders to public crises, turning perceived magnanimity into valuable consumer equity. And this is not the first time. When Notre-Dame was ravaged by an accidental fire, the wealthy heads of LVMH and Kering rushed in with a combined €3 million of aid. Indeed, brands and companies who use their massive platforms to do good reap double the benefits: positive sentiment and a swell in their communities.

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Despite industry fear that now is not a time for fashion, **89 percent of our audience still wants to hear from fashion brands**, in some way or another — whether it's the efforts of LVMH and Kering shifting their ateliers to produce PPE, or it's small labels stressing the existential importance of supporting independent brands through this crisis.

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Rather than seeing it as a value-add, the Highsnobiety readers in particular almost **expect** brands to display a level of proactive altruistic involvement on the world stage — and they themselves want to be a part of this conversation.

**"FROM THE TOP OF MY MIND UNIQLO DEFINITELY STANDS OUT BECAUSE INSTEAD OF USING THEIR PRODUCTION FACTORIES TO CONTINUE MAKING CLOTHING, THEY'RE CREATING MASKS, WHICH ARE CURRENTLY ESSENTIAL FOR MEDICAL STAFF."  
(HIGHSNOBIETY READER)**



# VALUE VERSUS VALUES

**Although youth culture has become less anti-consumerist than ever before, it seems that the readers we spoke to are taking stock of what they've accrued in a lifetime of chasing clout.**

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Yet it is important to distinguish this awakening from those who detest the idea of spending more than one needs to on clothing. The readers we spoke to still value connoisseurship. However, they are now reckoning with a newfound aversion to the more shallow aspects of luxury.

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To put in more bluntly:

**The Immunized Shopper has been sick with hype, and now they're sick of hype.**

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The new journey of the Immunized Shopper — young people surfing through crisis — is a process of separating value from values, wants from needs, entertainment from enlightenment.

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Of all the categories Highsnobiety readers plan to increase their spend on, the highest are education (43 percent) and — strangely, yet not surprisingly — furniture (35 percent). Instead of dressing themselves, they're now focused on furnishing their external and internal environments.

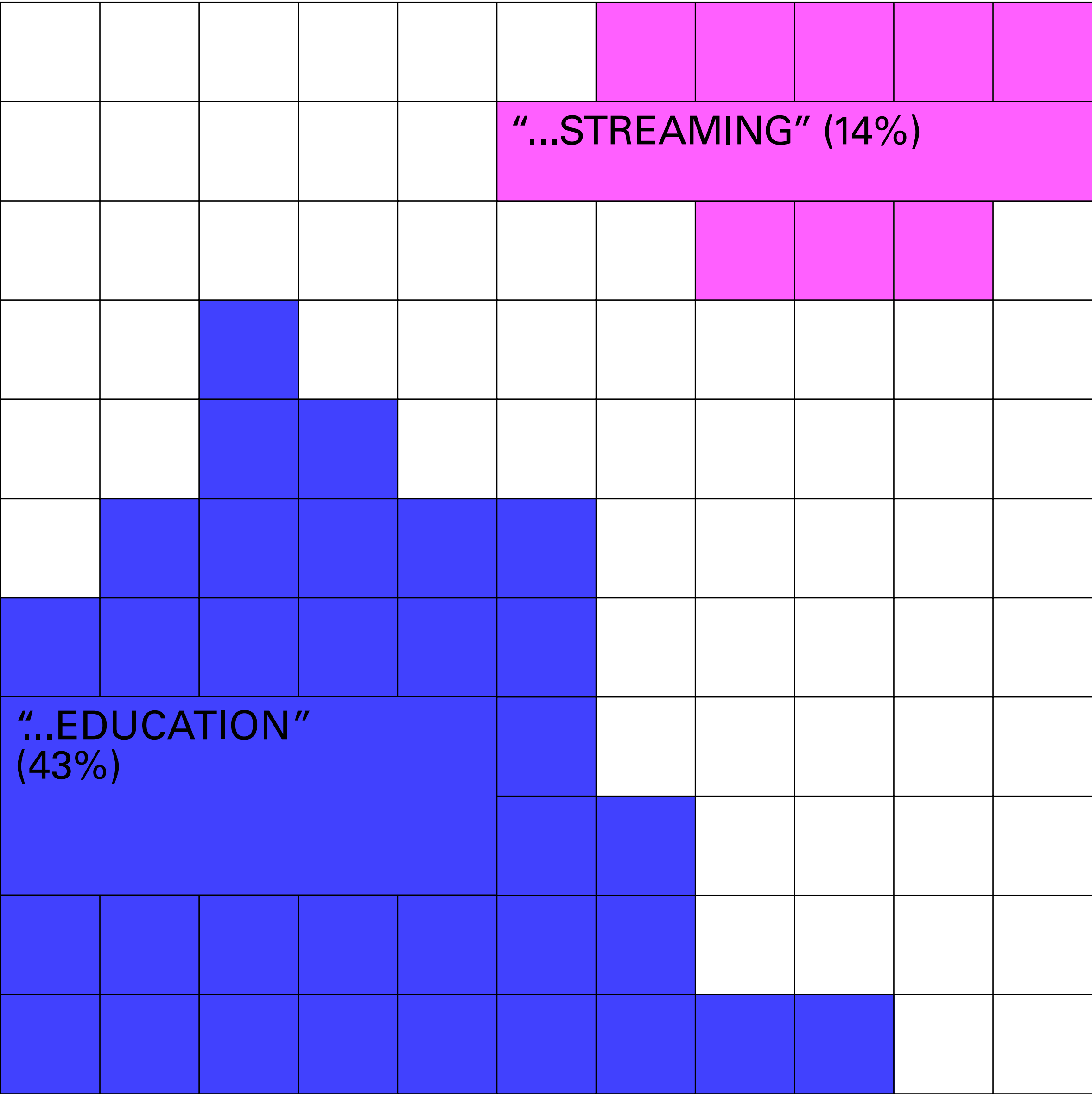
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In many of our survey results, the idea of "time" came up often — both as an unexpected gift given to our readers as a side effect of self-isolation, and as a precious thing not to waste.

**"I'VE BEEN A SNEAKER COLLECTOR FOREVER,  
BUT MY STOCK PILE OF 1000+ SHOES THAT  
I KEEP AT MY FRIENDS HOUSE FEELS VALUELESS.  
DO I REALLY NEED THAT MANY?"  
(HIGHSNOBIETY READER)**

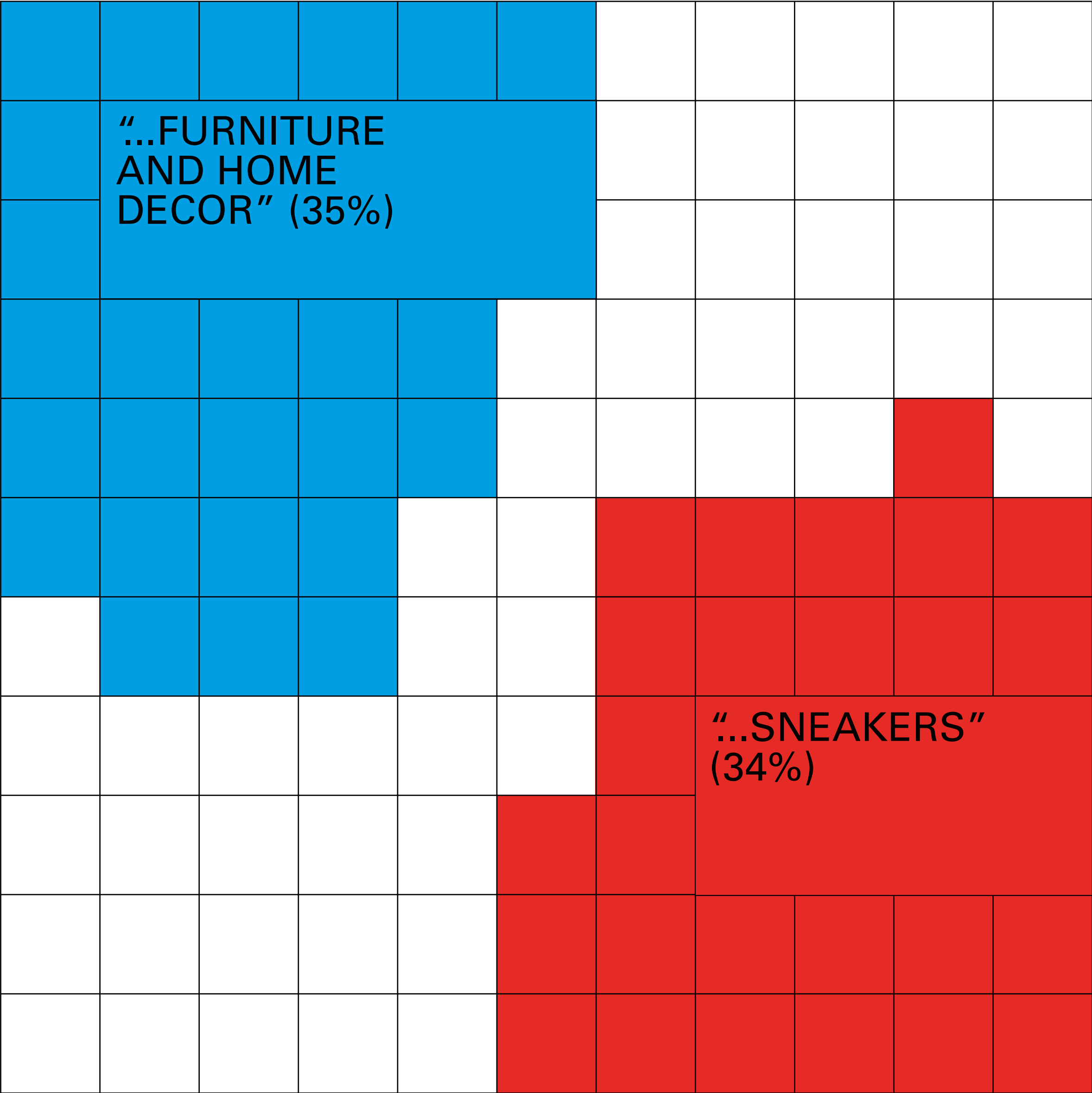
# NO MORE WASTING TIME

“In the next 6 months,  
I expect to spend  
more on ...”



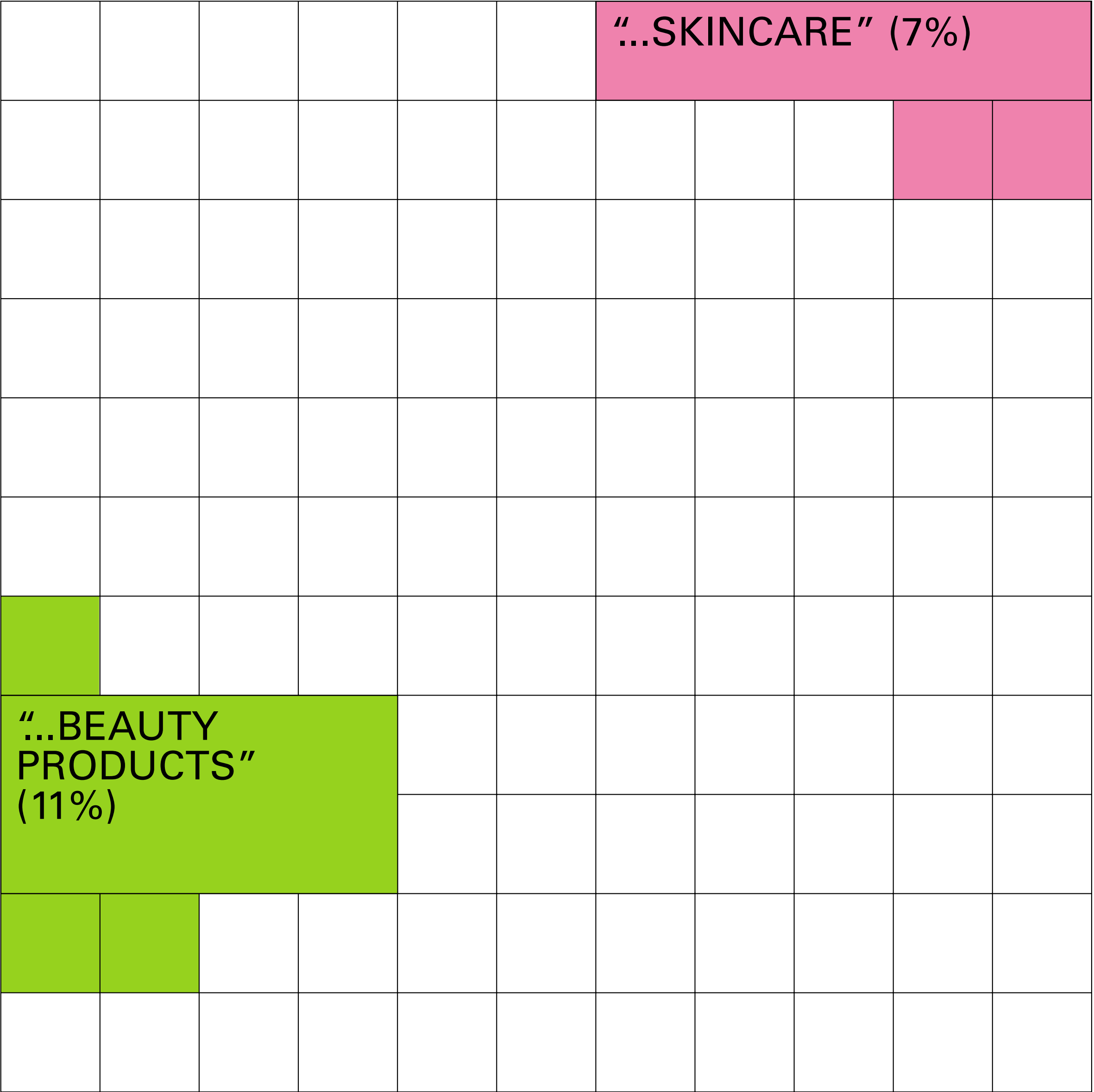
# JUST THE ESSENTIALS

“In the next 6 months,  
I expect to spend  
more on ...”



# LOOKING GOOD IS RECESSION-PROOF

“In the next 6 months,  
I expect to spend  
less on ...”





**"I COOK, READ, TALK TO MY FAMILY, ENJOY THE  
INDOORS MORE THAN I HAVE IN THE PAST TWO  
YEARS. I SIMPLY AM NOT GETTING BORED. AND IT'S  
REASSURING TO KNOW THAT — ESPECIALLY SINCE  
LONELINESS AND BOREDOM ARE PROBABLY SOME OF  
THE MOST FEARED THINGS IN TODAY'S SOCIETY."  
(HIGHSNOBIETY READER)**

# MINIMALISM, NOT AUSTERITY

**While conspicuous consumption might be waning, fashion and style as interests (both intellectually and economically) remain strong.**

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Many of the readers who participated in our study plan to increase their spending in categories like sneakers, education, and furniture. And although 42 percent of those who we polled feel uncomfortable indulging in expensive fashion while many others are tightening their belts, only 15 percent of them say the Covid-19 crisis affects their overall passion for style.

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The Immunized Shoppers we spoke to seem to pride themselves much more on cultural literacy than broadcasting purchasing power. Trend-wise, 54 percent of the readers we spoke to expressed **a sudden aversion to large logo placements**, while 33 percent find ostentatious “chunky” sneaker silhouettes less attractive now than before Covid-19. Of the aesthetic systems we polled readers on, “Minimalism” ranked highest in terms of its post-pandemic attractiveness.

# MINIMALISM, NOT AUSTERITY (CONT'D)

**In the late-aughts, the 2008 recession had a similar, yet also very different impact on the world of menswear.**

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Similar to the views portrayed by our readers, logos all but disappeared. Style retreated to classic aesthetic tropes, from tailored suits to hard-wearing workwear. Men dressed for interviews they hoped to get, and **bloggers began to look more like loggers**, taking on beards, boots, and buffalo plaids.

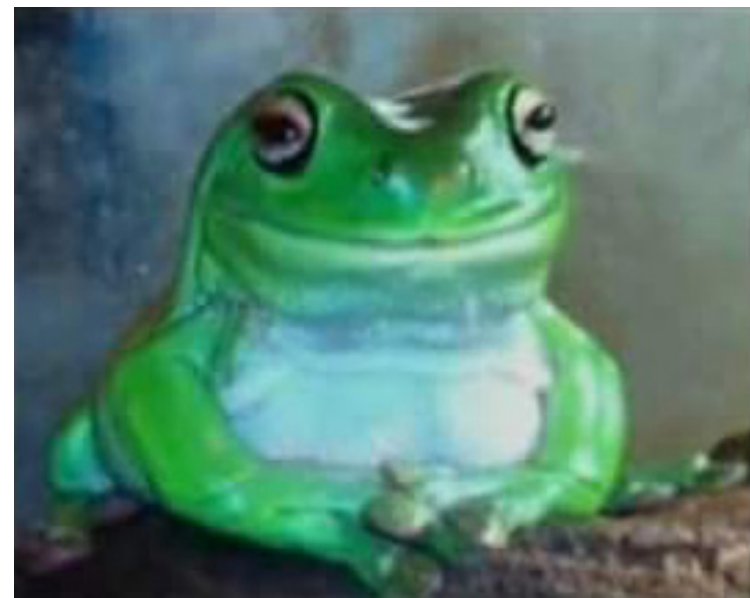
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However, while the readers in our survey display a newfound affinity for “timelessness,” our generational relationship to high quality is no longer stuck in the past. Through the streetwear revolution in luxury, labels like Bape and Supreme can comfortably thrive in the same conversation as Louis Vuitton and Gucci. As the once-niche streetwear and sneaker cultures continue to go mainstream, “return-to-roots” heritage dressing won’t manifest today in the same way it did during the 2008 recession.

**"I REALLY HOPE WE DON'T SEE MOTHERFUCKERS  
LOOKING LIKE THEY'RE DRESSED IN THE 1920S  
AGAIN, IN SADDLE SHOES AND TOP HATS.  
THERE IS A MIDDLE GROUND WHERE SNEAKERS,  
STREETWEAR, AND OTHER CLOTHING CAN  
HAPPILY COEXIST." (PODCASTER JAMES HARRIS IN  
CONVERSATION WITH HIGHSNOBIETY)**

# NEW VALUES, NEW FAUX PAS

**“Since the Covid-19  
pandemic I find  
\_\_\_\_\_ more  
attractive.”**



- MINIMALISM (53%)
- STREETWEAR CLASSICS (43%)
- SEASONLESS STAPLES (35%)

MINIMALISM, NOT AUSTERITY

**“Since the Covid-19  
pandemic I find  
\_\_\_\_\_ less  
attractive.”**

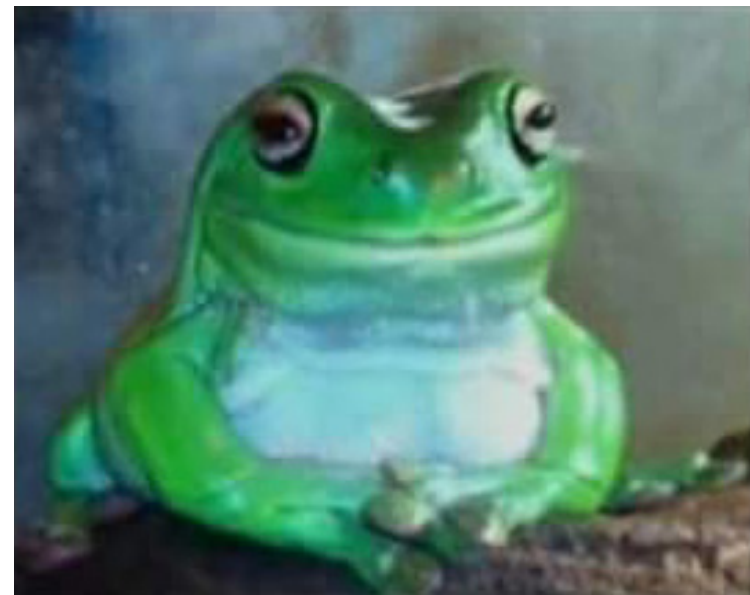


- LOGOMANIA (54%)
- CHUNKY SNEAKERS (33%)
- MONOGRAMS (25%)



# NEW PRIORITIES, OLD ONES

“Since the Covid-19 pandemic I find \_\_\_\_\_ more attractive.”



- QUALITY (60 %)
- TIMELESS BRAND (50 %)
- SUSTAINABILITY (43 %)



- RESALE VALUE (8 %)
- STATUS SIGNALLING (10 %)
- INFLUENCERS (14 %)

# CONCLUSION: A NEW OPTIMISM

**Ironically, in times like these, the most unanimous result of our survey centered around optimism: 99 percent of the readers we spoke to expressed a positive outlook on their post-Covid-19 future.**

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It is therefore clear that the rise of the Immunized Shopper is **not a recession-era move toward purity, pessimism, and simplicity.** Rather, what we see now is desire for fashion to engage with its audience beyond the level of appearance and necessity: something that strives toward knowledge, education, and appreciation.

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What's clear is our readers feel increasingly optimistic about their future despite the looming and lasting effects of Covid-19. Many cite the examples of brands like Louis Vuitton, Prada, Burberry, and Gucci as reinforcing their passion for the industry, galvanizing their connection to the global fashion complex. It echoes a sentiment shared by Virgil Abloh when he spoke at Harvard's Graduate School of Design in 2017: "Don't get trapped in the mentality of: Everything sucks, the world is coming to an end. That's just an internal mechanism to chill."

# CONCLUSION: A NEW OPTIMISM (CONT'D)

**This is not a time to hit the self-destruct button for the audience members we heard from — rather, it's a hard reboot.**

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And many of the things our study heralds the decline of — conspicuous consumption, logo fever — were already on the way out. Yet a strong connection to brands remains, one that provides young creative people with a road map for how their ideas can do good in the world.

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No matter what the future holds, it is clear the next thing is currently being incubated by this brave, bold new generation of Immunized Shoppers, a generation of brand natives who will come out this crisis with even more finely honed **bullshit detectors**. Marketing to them will require more than just knowing the language — it will require the transparency in actions as well.

# ABOUT HIGHSNOBIETY

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**Highsnobiety is a media authority on youth fashion and the culture that surrounds it. Started as a lifestyle publication which grew out of a streetwear blog launched in 2005, Highsnobiety now also operates an in-house creative agency, shopping platform and insights- and strategy consultancy for its brand partners. In a world where being culture-obsessed has become not the exception but the rule, Highsnobiety's mission is to turn curious outsiders into cultivated insiders.**

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**For more first-hand insights on the business behind youth culture and what makes our market tick, sign up to the Highsnobiety Insights Newsletter: <http://hsnob.co/omte>**

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