

#IMPACTFUL

The monthly newsletter that deciphers opinion.

Edition #27

REPORT OF THE MONTH

The second-hand market gets a new lease of life

p.2

MEDIA VERSUS REALITY

Influence: macro-debates, micro-offences

p.5

EMERGING SIGNALS, STRONG SIGNALS

Is the future of social media private?

p.6

LAST BUT NOT LEAST

ChatGPT gets eyes and a voice

p.7

REPORT OF THE MONTH

The second-hand market gets a new lease of life

From an emerging trend for its usefulness to a fully-fledged mode of consumerism

Autumn 2023 was the time to reiterate the importance of buying second-hand as a veritable way of consuming for French people. According to a study by Joko, **Vinted was France's most popular platform for the start of the school year in 2023**. From the retail giants to lifestyle media, all boast the ecological and economic benefits of the second-hand market, and even local media are responding to the growing expectations of their readers on the subject by increasingly focusing on the second-hand stores and thrift stores in their regions.

61 %

of French people automatically look to see if a new product is on sale at a more appealing price on a second-hand platform
(Sofinscope, 2023)

76 %

of French people have already bought or sold second-hand products
(IFOP, 2023)

81 %

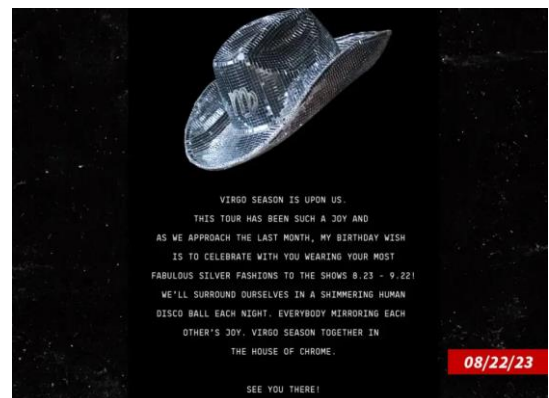
of French people intend to buy as many or more second-hand articles in the coming months
(Le Bon Coin study, 2023)

The second-hand market is firmly established on rational arguments: firstly, its economic value - the purchase of second-hand articles is presented as a way to protect your wallet. Then, the emergence of players like Vinted and Le Bon Coin has enabled the phenomenon to expand, notably by offering second-hand as a solution to the problem of overconsumption.

Nevertheless, an event that happened earlier this year proved that the concept of second-hand as a simple pragmatic solution no longer applies...

By asking fans to wear silver outfits at her concerts, the American singer, Beyoncé, generated **an increase of 658% in searches for metallic clothes and accessories, globally**, according to a study by the e-commerce website NastyGal... a rise that was as noticeable on fast-fashion websites as it was on second-hand platforms!

Which all goes to show that this practice has become an actual consumer reflex, no longer necessarily responding to aspirations to consume more responsibly or to consume less, but also to consume for pleasure and for style!



On Instagram, Beyoncé asked her fans to "celebrate" Virgo season and her birthday by wearing outfits specifically designed for her concerts...and the fans played along!

REPORT OF THE MONTH

The second-hand market gets a new lease of life

Brands change their message...

If second-hand appeals to the large majority of French people today, it's precisely because the associated players have achieved a real feat: **transcending the bounds of utility and increasing their creative capital.**



leboncoin.fr

"Find a good deal among the 26 915 802 adverts on leboncoin"



leboncoin
Le bon _____ pour tous.

This change in paradigm for buying pre-owned items is reflected in the shift in message from Le Bon Coin, an essential player in the second-hand market and its popularization in France.

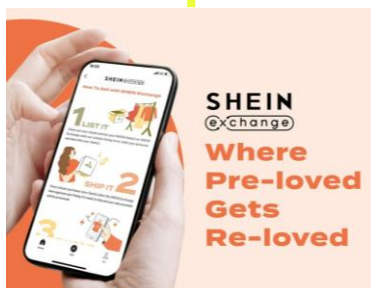
Initially the specialist in the "good deal", Le Bon Coin presented a new tagline a few years ago, which translates to "The right__for everybody", highlighting the brand's capacity to respond to every expectation, be it about the rational benefits of second-hand ("The right choice for the planet") or individual consumer aspirations ("The right sofa for my living room").

This evolving tagline therefore acknowledges the numerous scenarios in which pre-owned turns out to be **the best choice**, beyond simple pragmatism.

...by capitalizing on this new range of possibilities!

Paradoxically, fast fashion brands have also launched their own resale platforms. By exploiting the pragmatic arguments for choosing second-hand clothes to legitimize their initiative, they have developed more appealing concepts to continue to inspire their customers.

With its pre-owned platform, Zara focusses its message on its commitment to the circular economy, helping to "extend the lifespan of clothes". This choice is not insignificant, as by talking about circularity rather than pre-owned, the brand wants to promote each customer's individual sustainability initiative, aligning it with Zara's promise to *"make responsibility and inspiration accessible to all"*.



The strategy of the Chinese brand, Shein, is different. By rebranding the second-hand around the term "pre-loved" – something that H&M also did – Shein appeals to the empathy of its customers ("Love really does make the world go 'round!") and draws on the imagery of second-hand clothes as individual pieces, each with its own story.

REPORT OF THE MONTH

The second-hand market gets a new lease of life

The imagery associated with second-hand broadens

An increasing number of brands are embarking on the path of second-hand and, in so doing, are adopting a multi-dimensional narrative, to appeal to a broader audience and **meet all their requirements**. Their message is fueled by both rational and aspirational concepts, creating more promising horizons. They address the ideas of pleasure, the reassurance of getting the right article at the right price, and the reconciliation of consumption and personal commitments to sustainability.

eBay well understands the issues at hand. To mark its return to advertising in France, the brand relied on an emotional narrative to reintroduce itself to French consumers.



"To say that it's good for the planet, isn't the key. You have to show that second-hand enables people to buy unusual objects that wouldn't be accessible new. It's not old fashioned. On the contrary, it's a pleasure purchase."

Ségolène de Noray, Marketing Director at eBay.

The new brand campaign fittingly tells the story of a young woman who is looking for the perfect mirror. One that she can only find on eBay - the only platform able to offer a unique object that suits her and that allows her to assert her identity. The evocative tagline **"Find the difference that matches you"** focuses on second-hand as an expression of people's individuality, beyond its factual benefits.



After having built a wider imagery, allowing consumers to meet all their purchasing aspirations, it will be particularly interesting to see how brands can sufficiently differentiate their messages, so as not to lose the customer in a plethora of new marketplaces...



THE OMNI EYE

"The second-hand market needed powerful storytelling to go from a one-dimensional trend to a very desirable way of consuming. To do this, brands have developed the imagery of this practice to position it as an echo of deeper consumer aspirations: expression of their identity, of their style and singularity... In short, to reconcile their hearts with their heads by offering a purchase with functional benefits certainly, but also one that continues to provide pleasure!"

Gaëtan Peret – Junior Strategic Planner, Omnicom PR Group

MEDIA VERSUS REALITY

Influence: macro-debates, micro-offences

Media are focused on the controversial topics of macro-influence

2023 was rich with news in the world of influence. Even though the sector has finally found a regulatory framework in which to sustain itself, media noise nevertheless seems catalyzed by controversies around "influence-thieves" and other influencers guilty of wrongdoing. As proof, the drama of the Booba/Magali Berdah affair, which started nearly two years ago, continues to be picked up by the mainstream media outlets.


« Hypocritical »: despite the influencer law, the scams continue


Booba-Magali Berdah affair: a résumé of the war between the rapper and the influencer agent


Booba versus Dylan Thiry: what we know about the accusations against the influencer


Major influencers can earn 30 000 euros with a single Instagram story

Such visibility fuels questions that have always been debated in the sector. Notably, around the value of influencers versus their compensation, which is perceived as excessive, even indecent... But the idea of macro-influencers being overpaid and fundamentally dishonest is exaggerated compared to reality.

A reality that further incriminates micro-influencers

The September edition of the Observatoire de l'Influence Responsable (the Responsible Influence watchdog) by the ARPP (the French advertising self-regulatory organization) tells us that more than 1000 influencers have obtained the Responsible Influence Certificate. This represents a meteoric rise, given that they reported only 150 influencers in September 2022. The acquisition of such a certification correlates with a real awareness of ethical influence practices: in the first half of 2023, only 0.78% of the content published by certified creators did not comply with the transparency rules.

If we look in more detail at the non-compliance figures, the ARPP reveals that they are more due to micro and nano-influencers: **23% of their commercial content doesn't specify their collaboration with a brand, compared to only 8% of macro-influencers.** This figure highlights that influencers with small audiences are less aware of the regulations and tend to be ignorant of the legal framework they have to adhere to, or that they simply don't consider themselves to be influencers.

Instead of validating a "Mad Men"esque vision of influence, these figures show us that it is crucial to help micro-influencers better understand the rules, and this will require more educational initiatives.


@collectifsai
YARA
Yara, be careful honey.
We've recently started following you, so we have very little perspective of your content.
A few questions: are you working with an agency? Since when have you been sharing brands? Are you working under contract or independently?
In any event, you need to urgently comply to the norms.
Nano-influencer or not, ignorance of the law is no excuse.

Each month this X account presents an "assessment review" to remind people of correct practices, as far as commercial collaborations are concerned. They don't hesitate to single out both macro and micro-influencers.



THE OMNI EYE

"The recently introduced rules brought in to regulate the market of influence have exposed certain misconceptions about "influence-thieves". Even though partnerships with high profile accounts are scrutinized, micro-influencers sometimes slip below the radar. This is a key element of our consulting support at OPRG: to insure the smooth running of collaborations between brands and creators, in accordance with brand messages and applicable regulations, whatever their profile or their level of professionalization."

Ophélie Wachala – Account Manager, Brand & Lifestyle, Omnicom PR Group

EMERGING SIGNALS, STRONG SIGNALS

Is the future of social media private?

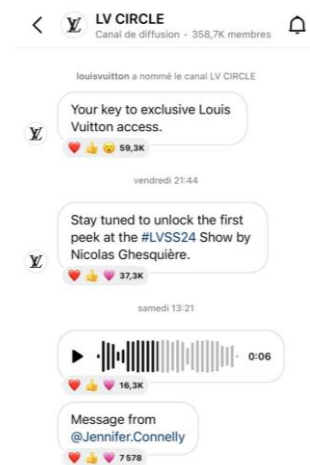


"People think of Instagram as a feed of square photos...but that's the third most important surface at most, maybe fourth now. People say 'you don't show enough of my friends posts... well that's because your friends don't post that much to feed!'"
Adam Mosseri, Head of Instagram, in an interview last August.

Have we entered the era of Dark Social?

Even if Adam Mosseri's words went unacknowledged this summer, they testify to an important change in the way people are using social networks. And as sending direct messages has become the most used feature on Instagram, this year the application introduced "Broadcast Channels" allowing content creators to send direct messages containing exclusive content to their followers. And the phenomenon doesn't just concern Instagram: X/Twitter in turn tried out "Circles" – which has since been removed – favoring private interaction between users. And even BeReal has begun to implement a messaging feature, allowing users to "create deeper connections".

If open social networks are retreating so much into private interactions, the extensive use of encrypted messaging is already well-established: **WhatsApp was the most downloaded app in France in 2022, according to Arcep and Arcom, beating even TikTok!**



And brands haven't ignored the popularity of privacy on social media, as it is often synonymous with an **augmented experience** and what is perceived as a **privileged interaction**.

To unveil its latest perfume last May, Courrèges launched a half-public, half-private campaign, giving people the ability to experience an exclusive WhatsApp initiative. The brand posted a telephone number on its Instagram account and when people called it, they could listen to a vocal poem, before chatting by message to learn about the perfume.

The question that remains: what metrics can be used to monitor campaigns like this? The science isn't exact on the subject yet, but brands are still choosing to take the path, which proves its significance.



THE OMNI EYE

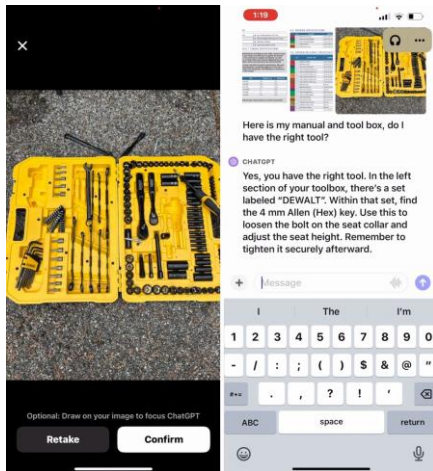
"The standardization of content and social media features, combined with the risk of compromising privacy, are contributing to the anonymization of profiles and the rise of dark social. After being inspired by Snapchat's AR filters and TikTok's algorithm, platforms are turning towards the messaging features of Telegram (Channels on WhatsApp and Broadcast Channels on Instagram). The next development is most likely to be geared towards community gaming and associated platforms, like Discord and Reddit."

Ulysse Roux – Account Director, Social & Innovation, Omnicom PR Group

LAST BUT NOT LEAST

ChatGPT gets eyes and a voice

ChatGPT acquires its third sense



Here, a user asks ChatGPT to analyze their photo to find out if they have the right tool based on a manual: an example that shows the capabilities of image analysis and contextualization of the chatbot!

The next development of the generative AI interface that initially became famous for its capacity to produce text content, aims to make it more intuitive and inclusive by integrating searches that can include images and enable vocal interactions. These advancements will offer users the possibility to chat with ChatGPT by sharing images. For example, according to information communicated by OpenAI, if they're looking for cooking tips, they will be able to show the contents of their fridge.

These new features aren't limited to the fun aspect but will also include practical applications such as help with children's homework, or even reading them a bedtime story. Paying subscribers to ChatGPT Plus and Enterprise plans will have access to these enhancements.

And how will this apply to brands?

Spotify has already claimed a position on this new voice feature, announcing the introduction of automatic translations of podcasts, with synthetic voices generated by ChatGPT. This collaboration aims to make programs recorded in English accessible in several languages, while still maintaining podcasters' distinctive speech characteristics. Spotify has invested significantly in podcasts over the last months and this new feature will offer a **more authentic listening experience, which will sound more personal and natural than traditional dubbing.**



As far as image analysis is concerned, this feature hasn't yet found an application in the communication sector. However, experts agree that the function could, in the long term, enable the democratization of alternative text. In particular, for the visually impaired, delegating the task of automatically generating the description of images to AI.

It remains to be seen how more traditional brands will be able to use ChatGPT's eyes and voice to make their campaigns more personalized or more inclusive...

WANT TO TALK?

For any advice or guidance, please contact the **Omnicom PR Group**.

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