Trabajo de Fin de Grado

Grado en Gestión Industrial de la Moda

THE FUTURE OF CIRCULAR ECONOMY: SECOND-HAND CLOTHING IN SPAIN

EL FUTURO DE LA ECONOMÍA CIRCULAR: LA MODA DE SEGUNDA MANO EN ESPAÑA

O FUTURO DA ECONOMÍA CIRCULAR: A MODA DE SEGUNDA MAN EN ESPAÑA

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For my family, friends, and partner

For those who will always be in my heart

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Summary

The beginning of the consumer society era or the fast fashion phenomenon have led the planet to generate and accumulate huge amounts of clothing waste. According to data from *Asociación Ibérica de Reciclaje Textil* (ASIRTEX, 2019), in Spain, an average of 32.35kg of clothing is discarded per person and only 1.7kg is processed correctly. The circular economy, and within this, the marketing of second-hand fashion, is one of the main challenges that, in terms of sustainability, the textile sector must face. For this reason, this Final Degree Project aims to answer three main questions. Firstly, to analyse the situation of second-hand clothing in Spain. Secondly, to find out the position adopted by buyers with respect to the second-hand clothing market. And finally, to determine whether the second-hand market would be a viable option for the circular economy in Spain.

In terms of methodology, this work uses different scientific methods. The analytical-synthetic method is applied in the first part of the work (chapters 1-3), where a literature review of previous publications is carried out. After this review, in a deductive way, the possible variables that influence the purchasing decision were selected, with the aim of designing a structured questionnaire. The empirical analysis, on the other hand, makes use of the hypothetical-deductive method, based on the descriptive analysis of the primary data obtained through the survey carried out on 215 people. Finally, based on the information analysed, the main conclusions and contributions are presented in an inductive manner.

The empirical evidence shows that in Spain more than half of the people interviewed are consumers of second-hand clothes and that even non-buyers would be willing to buy second-hand if certain conditions were met. People who buy second-hand clothes in Spain are style-conscious consumers, but they are also aware of the environmental impact of second-hand clothes compared to new clothes. They would also be willing to spend more money on clothes that are sustainable. The responses found allow us to affirm that buying second-hand clothes is a buying trend that seems to be on the rise in the coming years. In general, Spanish consumers have received a positive response to second-hand clothing and there is little stigma attached to it, making it a viable option for the circular economy in Spain. Furthermore, it has been found that the pandemic caused by COVID-19 did not have a major impact on the behaviour of second-hand clothing consumers. Ultimately, this work allows us to consider second-hand clothing as a positive part of the potential future of the textile industry. A future that uses resources already present in this planet and that is more sustainable and environmentally friendly.

Keywords: second-hand clothing, consumers, circular economy, sustainability, characterisation, Spain.

Resumen

El inicio de la era de la sociedad de consumo o el fenómeno del *fast fashion* han llevado al planeta a generar y acumular cantidades ingentes de desechos de ropa. Según datos de la *Asociación Ibérica de Reciclaje Textil* (ASIRTEX, 2019), en España, se desechan una media de 32.35kg de ropa por persona y solo 1.7kg son procesados correctamente. La economía circular, y dentro de ésta, la comercialización de moda de segunda mano, constituyen uno de los principales desafíos que, en términos de sostenibilidad, debe afrontar el sector textil. Por ello, este Trabajo Fin de Grado tiene como objetivo dar respuesta a tres cuestiones principales. En primer lugar, analizar la situación de la ropa de segunda mano en España. En segundo lugar, conocer la posición adoptada por los compradores con respecto al mercado de ropa de segunda mano. Y finalmente, determinar si el mercado de segunda mano sería una opción viable para la economía circular en España.

Sobre la metodología, en este trabajo se hace uso de diferentes métodos científicos. El método analítico-sintético se aplica en la primera parte del trabajo (capítulos 1-3), donde se realiza una revisión bibliográfica de publicaciones previas. Tras esta revisión, de un modo deductivo, se han seleccionado las posibles variables que influyen en la decisión de compra, con el objetivo de diseñar un cuestionario estructurado. El análisis empírico, por su parte, hace uso del método hipotético-deductivo, a partir del análisis descriptivo de los datos primarios obtenidos a través de la encuesta realizada a 215 personas. Finalmente, a partir de la información analizada, de un modo inductivo, se presentan las principales conclusiones y aportaciones.

La evidencia empírica muestra que en España más de la mitad de las personas entrevistadas son consumidoras de ropa de segunda mano y que incluso las no compradoras estarían dispuestas a comprar de segunda mano si se dan ciertas condiciones. Las personas que consumen ropa de segunda mano en nuestro país están centradas en el estilo, pero, a su vez, conscientes del impacto medioambiental de la ropa de segunda mano en relación con la ropa nueva. Asimismo, estarían dispuestas a gastar más dinero en prendas que fueran sostenibles. Las respuestas encontradas nos permiten afirmar que la compra de ropa segunda mano es una tendencia de compra que parece irá en aumento en los próximo años. En general, los consumidores españoles han recibido una respuesta positiva a la ropa de segunda mano y existe poco estigma en torno a ella, por lo que sería una opción viable para la economía circular en España. Además, se ha detectado que la pandemia provocada por el COVID-19 no tuvo un gran impacto en el comportamiento de estos consumidores. En última instancia, este trabajo permite considerar las prendas de segunda mano como parte positiva del potencial futuro de la industria textil. Un futuro que utilice recursos ya presentes en nuestro planeta y que sea más sostenible y respetuoso con el medio ambiente.

Palabras clave: ropa de segunda mano, consumidores, economía circular, sostenibilidad, caracterización, España.

Resumo

O inicio da era da sociedade de consumo ou o fenómeno da moda rápida levaron ao planeta a xerar e acumular inxentes cantidades de residuos de roupa. Segundo datos da Asociación Ibérica de Reciclaxe Téxtil (ASIRTEX, 2019), en España descártanse unha media de 32,35 kg de roupa por persoa e só se procesan correctamente 1,7 kg. A economía circular, e dentro dela, a venda de moda de segunda man, constitúen un dos principais retos que debe afrontar o sector téxtil en materia de sustentabilidade. Polo tanto, este Traballo Fin de Grao pretende dar resposta a tres preguntas principais. En primeiro lugar, analizar a situación da roupa de segunda man en España. En segundo lugar, coñecer a posición adoptada polos compradores con respecto ao mercado de roupa de segunda man. E por último, determinar se o mercado de segunda man sería unha opción viable para a economía circular en España.

En canto á metodoloxía, podemos afirmar que este traballo fai uso de diferentes métodos científicos. O método analítico-sintético aplícase na primeira parte do traballo (capítulos 1-3), onde se realiza unha revisión bibliográfica de publicacións anteriores. Tras esta revisión, de forma dedutiva, seleccionáronse as posibles variables que inflúen na decisión de compra, co obxectivo de deseñar un cuestionario estruturado. A análise empírica, pola súa banda, fai uso do método hipotético-dedutivo, baseado na análise descritiva dos datos primarios obtidos mediante a enquisa a 215 persoas. Finalmente, a partir da información analizada, de xeito inductivo, preséntanse as principais conclusións e achegas.

A evidencia empírica mostra que en España máis da metade das persoas entrevistadas son consumidores de roupa de segunda man e que incluso os non compradores estarían dispostos a comprar de segunda man se se cumpren determinadas condicións. As persoas que consumen roupa de segunda man no noso país son consumidores centrados no estilo, pero, ao mesmo tempo, son conscientes do impacto ambiental da roupa de segunda man en relación coa roupa nova. Así mesmo, tamén estarían dispostos a gastar máis cartos en prendas que fosen sostibles. As respostas atopadas permítennos afirmar que a compra de roupa de segunda man é unha tendencia de compra que parece ir en aumento nos próximos anos. En xeral, os consumidores españois recibiron unha resposta positiva á roupa de segunda man e hai pouco estigma ao seu redor, polo que sería unha opción viable para a economía circular en España. Ademais, detectouse que a pandemia provocada polo COVID-19 non tivo un gran impacto no comportamento dos consumidores de roupa de segunda man. En definitiva, este traballo permítenos considerar a roupa de segunda man como parte positiva do potencial de futuro da industria téxtil. Un futuro que utilice recursos xa presentes no noso planeta e que sexa máis sostible e respectuoso co medio ambiente.

Palabras clave: ropa de segunda man, consumidores, economía circular, sustentabilidade, caracterización, España.

Introduction

The textile fashion industry is, nowadays, one of the largest industries in the world, growing from 2000 to 2014 by 60% (Remy *et al*., 2020). A direct consequence of this increase in sales was the increase in production. Up to 100 billion of garments are manufactured every year (Hosey, 2020), of which a large percentage is thrown away (Greenpeace México, 2021).

This, in turn, has generated a huge environmental problem because those 100 billion garments that are manufactured require a large use on raw materials and natural resources that are now in short supply, endangering the sustainability of ecosystems. This would be the case of water, while in some areas of the planet there are droughts, to produce a pair of jeans up to 10,000 litres of water are needed (EasyEcotips, 2020).

This poses an incongruous situation for which there is already a potential solution, the use of which has increased in recent years, but which is far from widespread. This solution involves reusing resources whenever possible or using them as raw materials; in short, to generate less waste. All of this is part of the circular economy.

The main question it was raised in this project is what the circular economy will look like in an industry like the textile industry, which is so demanding in terms of resources. Many fashion companies are considering alternatives such as using more sustainable materials or minimising waste to become more sustainable. It was decided to analyse a different approach Because what is more sustainable than a garment that already exists?

An existing garment has already had its impact on the planet by the time it has been manufactured and distributed, and in most cases, it does not reach the end of its useful life. So, could the reuse of textiles be the future of fashion industry? And, above all, is the current Spanish consumer ready for second-hand garments? This project aims to answer these questions and some others that arose during the research, being three the main objectives. To determine the situation of second-hand clothing in Spain, to find out the position of second-hand buyers towards second-hand clothing and to determine whether it would be a viable route to the circular economy in Spain. As specific objectives, it is possible to highlight the following ones: to determine consumer preferences with respect to second-hand clothing, to understand the reasons why Spaniards do not buy second-hand clothing, to find out if this is a long-term solution, to clarify whether Spanish society is aware of the positive environmental impact of second-hand clothing, and whether the COVID-19 pandemic has had an effect on their purchases.

The methodology of this project has been carried out following two main techniques. Initially, a literature review of previous publications was conducted, in which it was contextualised the circular economy, second-hand clothing, and the consumer of second-hand clothing. After knowing all this, a questionnaire was developed to understand the consumer and the situation of second-hand clothing in Spain. An empirical analysis based mainly on this questionnaire was made.

From this analysis, it was concluded that the Spanish consumer has a high degree of acceptance of second-hand fashion. Although some adjustments and awareness are necessary, Spanish consumers show a good environmental awareness and few prejudices towards this type of garments. Therefore, in this project it has defined the second-hand consumer but also the Spanish non-consumer. This has allowed us to see the weaknesses of the market and how a correct expansion of second-hand clothing should be carried out in order to be accepted by consumers.

After this introductory section, the project is organized as follows. Chapter 1 offer a general overview about the circular economy, i.e., what it is nowadays and where it is going. Chapter 2 analyse second-hand clothing, i.e., its history, the current market, the business models, and the negative and positive aspects. Chapter 3 will talk about the second-hand consumer what it is known about the consumer from a more global point of view. Chapter 4, the methodology of this project. Chapter 5, through a questionnaire, the Spanish consumer was analysed, his vision and perception of second-hand clothes. Finally, Chapter 6 shows the results of these projects, its conclusions, problems, and future research that can be made.

1. Circular economy in the fashion industry

"Part of our problem in moving towards circularity is most people neither see the importance of it nor exactly know how to do it"

(John Elkington, CEO, and co-founder of *Volans Ventures*).

This first chapter is aimed at clarifying what the circular economy is and why it is important to understand this concept in order to talk about the future of fashion. Therefore, this first chapter is aimed at giving a proper context and facilitating the understanding of this concept by the reader.

1.1. The emergence of the concept of circular economy

The circular economy is "a model of production and consumption, which involves sharing, leasing, reusing, repairing, refurbishing and recycling existing materials and products, for as long as possible" (European Parliament, 2021). This model differs from the traditional or linear consumption model, which was only thought of until the customer had the product, i.e., no after-sales services were conceived to extend the life of the products, nor what the consumer would do with the product when it was no longer useful.

Before the emergence of the "circular economy" concept, there were other concepts already referring to similar ideas. Notably, different terms referring to environmentalism started to be used in the 1940s, gradually gaining importance until they became part of the usual vocabulary in the 1970s (Ekins, 2019). It was then when there was a considerable increase in the research on the topic.

The first person to refer to the idea of circularity concerning economy was Kenneth E. Boulding in his article "The Economics of the Coming Spaceship Earth." Boulding (1966), aware of the impacts of human activity on the Earth, acknowledged the need to create circularity on the planet. Boulding spoke of the need to reduce the consumption by comparing it to what would be the "spaceman economy"; i.e., a system, as defined by Kopnina and Poldner (2021) where the Earth is seen as a single spaceship, with limited resources either in what regards what can be taken from it (i.e., natural resources) and what can be disposed of (i.e., pollution and garbage). Boulding (1966) considered that the human being must adapt to a "cyclical ecological system" where consumption is reduced as much as possible and resources are used in an efficient way, looking for products with the longest possible useful life. However, the first person to refer to the "circular economy" term, as such, was Allen V. Kneese in article entitled "The Economics of Natural Resources," published in 1988 (Kneese, 1988).

One year later, Frosch and Gallopoulos (1989), conscious of the negative impact of pollution on the life quality of the population, published one of the first articles on the topic, dealing with the strategies for manufacturing. These authors pointed out that an ecologically responsible industry should "function as an analogue of biological ecosystems (i.e., plants synthesize nutrients that feed herbivores, which in turn feed a chain of carnivores whose wastes and bodies eventually feed further generations of plants)" (Frosch & Gallopoulos, 1989). This explanation, pioneer in that time, makes an accurate approximation to what the circular economy is, i.e., the idea is that industrial processes can be sustainable, recreating the same dynamics of nature. In this way, production processes are not only conceived from the point of view of the final product, but also thinking about how they affect other processes and how the impact of all of them can be reduced, minimising the necessary resources, and trying to close the loop.

According to the International Society for Industrial Ecology (ISIE,2022), this article was the precursor for a colloquium on industrial ecology, organised by the National Academy of Science in 1991 (Kumar & Patel, 1991), which laid the foundations for this term prior to the circular economy. As it was said, the term has been used before, but there was no consensus on what it was. In this colloquium it was defined what it was and what it implied, with a unified meaning that allowed the term to become popular and spread.

With this it has not only defined what the circular economy is, but also its historical evolution. The evolution of the term has led us to the 1990s, where it was finally defined and started to be used. With this the intention was to give the reader an understanding not only of the circular economy, but also of the evolution of thinking in society. Now, moving to a more current context, focusing on the vision and development of the concept of circular economy within the European Union (EU), aimed at understanding the actual situation and use of the term.

1.2. The circular economy in Europe

The concept of circular economy was gradually catching on in different companies and communities, as well as in governmental organisations. In 2015, for instance, the European Commission created its first ever circular action plan (European Commission, 2022b). This plan included fifty-four actions focused on the transition from a linear to a circular economy in the EU, including, among others, measures on the waste management in the value chain.

Five years later, in 2020, the European Commission created a new action plan on the circular economy. This new proposal aimed to reduce the pressure on existing raw materials, achieve a neutral footprint by 2050, and minimise the loss of biodiversity (European Commission, 2022a). In short, it stated specific measures for all processes within the value chain with the aim of creating truly sustainable products in the European Union.

In addition, the European Commission introduced legislation on the manufacture of products or the ban of single-use plastic products and adopted the ‘European Green Deal,’ which focuses on the increased use of renewable energy and the better use of existing resources. This plan also includes specific sections focussing on the textile industry which will be developed in more detail in Chapter 2. For now, what is relevant is to understand that the European Union has a clear commitment to establish and promote circularity within its member countries and in as many areas as possible.

The circular economy aims to seek greater sustainability, but this is something that cannot be implemented by industry or governments alone. As Frosch and Gallopoulos (1989) stated, a change of mentality and habits in society is needed. It is people who must demand and seek a reduction, reuse, and recycling of all its waste.

Ultimately, all these measures are born out of the need for a better world and the respect for that world. Hence the hackneyed phrase, which is repeated in all the articles on circular economy, “what we want, and need is to ‘close the loop’” is a counterpoint to the current situation many companies have, where an open, linear process takes place. "Closing the loop" means the construction of production chains that are efficient and with the least waste and the least number of new resources necessary to be efficient. This term can be observed in many EU communiqués, but also in the business language and in academic articles (European Commission, 2015).

1.3. The circular economy in the fashion industry

The fashion industry, the focus of this research, generates a great deal of pollution which urges the need to take further action. Indeed, Dottle and Gu (2022) warn that if action is not taken promptly, the world as it was known it may have nothing like it will in 10 years' time.

As Kate Krebs, member of the Closed Loop Partners, recognises, "waste is a design flaw, the ability to create circularity of all materials eliminates waste and builds a sustainable world" (Closed Loop Partners, 2021) and, therefore, clothing brands, like governments, have had to adapt to this change progressively, although it should be noted that by 2020 a third of the fashion industry was not yet implementing sustainability measures (Dean, 2020). For some brands, it has been a straightforward change, aligned with their values; for others, however, it was not in line with their values, which led some brands to even adopt ‘greenwashing’ practices. To put this in context, greenwashing is "the widespread practice of using advertising to falsely portray environmental responsibility, exists at the nexus between commercial advertising and ethical consumerism" (Jones, 2019, p.3).

Fashion brands have adopted different measures, most of them linked to the sustainability plans of companies. Some of the measures adopted by largest fashion companies, according to the classification made by Shapiro (2020), will be listed. In this regard, one of the main measures concerns the design stage, as much of the waste of a garment arises from its conception. Namely, close to 15% of a garment's fabric is wasted in the cutting process (Planeteer, 2021). In terms of design, brands such as *LMVH group* are committed to creating all their products with an eco-design point of view by 2030 (LVMH, 2022). Other fashion groups such as *Nike* or *Inditex* opt for prioritising the use of low-impact materials, creating, in the case of the latter group, a line of products (*Join Life*) made from recycled materials.

Regarding the life cycle of garments, *LVMH* aims to implement a repair and upcycling service by 2023. Similarly, *Nike* (Nike, 2022) is in the process of searching for circularity at the end of the useful life of their products, as well as thinking about how to separate the different components from their product when the useful life ends to recycle each part. *Inditex* aims to extend products' life cycle by donating a large part of its leftovers to Non-Governmental Organizations (NGOs).

Regarding packaging, *LMVH* proposes that by 2026 they will not use any plastic from fossil fuels. Other companies have also taken similar measures, as in the case of *Inditex*. Not only has this company eliminated plastic bags from their shops, but it has also started charging for paper bags, making it clear that the profit obtained from the sale of these bags will not go to the company, but to environmental projects (Martinez, 2021). In this way, *Inditex* promotes a responsible use of packaging, trying to persuade consumers of the importance of the environment.

In terms of manufacturing, many companies are committed to close production (that is, nearshoring or onshoring), as is the case of *Inditex*, where 50% of its garments are manufactured this way (Inditex, 2022). This reduces emissions derived from manufacturing and transport. *Sézane* is also looking for a closer production (Sézane, 2022). Although this French brand manufactures some collections in China, it is committed to local production. Recently, its T-shirts collection has opted for a complete production in France, from raw materials to the final product.

As can be seen, the measures applied by the different companies listed above follow a similar pattern, as they all have similar production models and large-scale production batches, even though the measures differ by company and area. Due to the great diversity in the textile sector, there is not a manual that details the exact steps to be taken to become sustainable (or more sustainable). Companies tend to review their actions by area by creating specific committees to come up with new ideas on how to carry out their processes or by outsourcing this task to a specialised company.

This brings us to the next question want to raise in this study, i.e., how the ideal way to apply the circular economy in fashion companies would be? And in this regard, ideally, a zero-waste policy should be implemented or, if waste is created, it should be reused or recycled to thus generate circularity in the company. The ideal application is extremely complicated, because even though the perfect conception of the process is known, putting it in practice is not so simple. Reversing the worldwide consumption pattern that has prevailed for many years is a tough challenge, so it is to implement the circular economy.

On many occasions, the idea of circularity can be seen as something that a company only has to apply to its production process; however, circularity goes beyond this. The idea of circularity would include everything from the energy consumed by the company to the furniture and technological devices that companies have, the products for sale and their subsequent life, up to an extensive list of processes that involve the manufacturing and selling of goods.

The transition to a circular economy should be done gradually. Large fashion companies, as previously stated, are striving to make changes towards sustainability, implementing, in some cases, circular practices in different areas of their value chain. But some of the practices implemented are not really sustainable or are not enough as compared to what is needed. As an example, in a 2021 campaign by *Redress*, 'Get Redressed!', this organization collected 20.5 tonnes of garments that consumers disposed thanks to the effort of 288 volunteers that invested 864 hours to sort the garments (Redress, 2021). What this campaign did was putting a burden on NGOs, for something that the textile industry is mostly responsible of.

Offering sustainable products is not enough either. According to Beall (2020), consumer habits have led to an average of 60% more clothing being purchased in 2020 than in 2005 and the average American throws away around 37 kgs. of textiles per year. This leads to believe that this number will continue to rise no matter how much investment is made in more sustainable garments. And here, second-hand clothing stands as an alternative to deal with this problem.

2. The second-hand clothing market: new business models

Second-hand clothing is a commodity that already exists, and it already exists in massive quantities. It is estimated that, on average, more than ninety-two million tonnes of textiles are thrown away every year, peaking at more than 100 billion in 2014 (Dean, 2020). It may look like these garments no longer have any value or that their useful life could only continue by being recycled to create new fibres. But what is most striking and what sustains second-hand fashion as a business is that the average number of times these garments are worn, before being thrown away, is seven times (Planeteer, 2021), so clothing is practically unworn. Another fact reinforcing this evidence has to do with the *Redress* case mentioned in Chapter 1. Among the 20.5 tonnes of garments this organization sorted, 10.67% were broken garments, 2.65% were used underwear and less than 2% were damaged or non-recyclable textile products (Redress, 2021). In other words, just over 15% of the garments cannot be reused and would have to be recycled to create new textiles, but the rest (that is, around seventeen tonnes) are garments that have not finished yet their useful life.

Therefore, evidence suggests that the sale of second-hand clothes is, in principle, a feasible business, both economically and environmentally. Second-hand clothes are products that already exist, and that have already created their impact on this world. So, in terms of sustainability, what better than wearing something that has already had its impact on this planet, rather than buying a new product that will creates new damage?

Chapter 2 outlines the historical and current context of second-hand clothing, identifies the different business models that have emerged around this concept., and ends up by presenting its main advantages and disadvantages. In sum, this chapter is intended to create a global vision to be able to determine if second-hand fashion could really be the future of the textile industry in terms of circularity.

2.1. Historical context

In order to understand what second-hand clothing is and, above all, the current perspective of it, Its history must be analysed. Therefore, this section looks back at second-hand origins and historical context.

Contrary to what it might be thought, second-hand clothing is a concept that is barely two hundred years old. Although it is true that the exact moment when the term was coined it was not found, the moment concept emerged was determined. Based on the Collins Dictionary definition, second-hand definition includes "things that are not new and have been owned by someone else" (Collins

Dictionary, 2022). In the old days, this perception did not exist, at least not in the same way as it does today. Fabrics were much more expensive to make and, therefore, to buy. For this reason, when a fabric was purchased and garments were made from it, those garments were used until the fabric was no longer of value. The garments were modified, readjusted, and transformed. In addition, this meant that all the sewing work was carried out almost daily, taking care of the garments so that they would be in optimum condition for as long as possible. Consequently, even if the garment was not new, it had an immense value due to the high cost of manufacturing it. With this, the lines between new and used were blurred, because garments were an item of great value and even luxury (Lilja & Jonsson, 2020).

But this perception changed with industrialisation, starting in England at the end of the eighteenth century. Industrialization changed many things in the textile sector, but the main change it brought was the fact that a wide range of textiles could be created on a massive scale and at a lower cost (Lilja & Jonsson, 2020). This lower cost resulted in lower garment production costs, which made it easier for consumers to buy more clothes. All this revolution was possible thanks to the creation of the sewing machine, the development of the aniline dyes, and the beginning of use of the first paper-based pattern-making techniques (Espinoza, 2021).

Since then, the concept of trends was introduced. It moved from trends that lasted almost half a century, to a constant change of trends as a consequence of implementing modern technologies. Thus, it went from a model in which garments were customised and handmade, which guaranteed their greater durability, to one in which trends were prioritized.

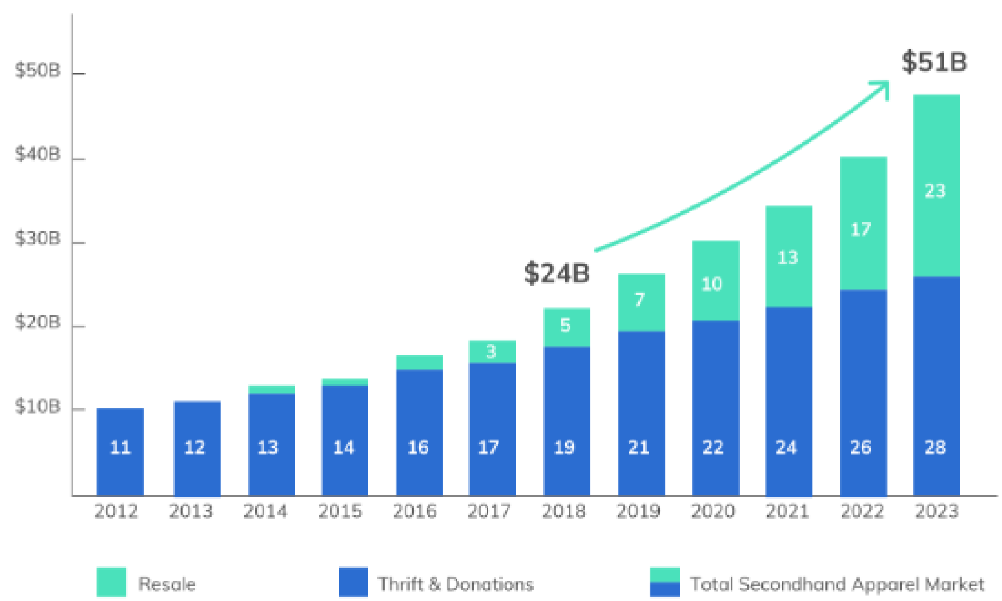
Industrialisation also prompted a change in the historical perspective on second-hand clothing, as some Swedish studies attest [e.g., Lilja & Jonsson (2020)]. With the advent of industrialisation and the subsequent automation of processes, costs decreased, making products more accessible to the general population (Romero, 2020). This made second-hand clothes less attractive. Besides, being able to have new clothes at a lower price meant that second-hand clothes no longer had as much value as a bargaining chip (Lilja & Jonsson, 2020). Cost reduction, coupled with increasingly rapid changes in trends (the more garments that could be created, the faster the trends rotated), boosted the purchase of new garments (Fahrenheit Magazine, 2020).

Returning to today's point of view, in the words of James Reinhart, co-founder and CEO of *ThredUp*, today society is returning to the vision of two hundred years ago; "as the line between new and used apparel blurs for consumers, a powerful transformation in retail will unfold". (*ThredUp*, 2019)

2.2. Current market

Today's second-hand clothing market is a growing sector. According to data from ThredUp (2019), the second-hand clothing market has steadily grown from being worth $11 billion in 2012 to potentially worth $51 billion by 2023, and even reach $77 in 2025 (ThredUp, 2021). This worth can be split into two variables -(a) resale and (b) thrift and donations-, as Figure 1 reflects. The resale sector is the one driving the growth; namely, it has experienced a growth 21 times faster than the retail apparel market in the last three years (ThredUp, 2019).

Figure 1. Total second-hand apparel market (2012-2023)



Source: *ThredUp* (2019)

As a result of this evolution, 62% of retailers are interested in getting involved, somehow, in second-hand fashion. Within this percentage, 60% would opt for a partnership with a company already involved in resale, 28% would start an in-house business from zero, 8% would acquire a company that sells second-hand clothes, and the remaining 4% will undertake other options (*ThredUp*, 2019).

From these data, one main inference can be drawn: most companies want to enter the second-hand clothing market in a comfortable way, i.e., in a way that do not require them to make major changes to their core company.

This is further shaped by the consumer profile itself. Chapter 3 will further develop the consumer profile but, to give a little context, the second-hand market is currently booming, largely because of young consumers and, particularly, the Z generation (Huber, 2020b). There are many factors why these consumers support second-hand clothing, but one circumstance that caused a clear acceleration was the pandemic. During the lockdown, social media applications such as *TikTok* grew by leaps and bounds (Huber, 2020a), with young people having the possibility to follow and support accounts with similar interests to their own. The hashtag "second-hand clothes," for instance, has more than 1.6 billion views, pointing out that this is a market in which users, and particularly, young people, have a strong interest.

As mentioned in Chapter 1, the action of governmental bodies is also encouraging the commitment to a more sustainable production and consumption in the field of fashion. For instance, the *EU Strategy for Sustainable and Circular Textiles*, which fulfils the commitments of the European Union's Green Deal or the new circular economy action plan, constitutes the path that the EU wants to set out for the textile industry. Its strategy intends to "create a greener, more competitive sector that is more resistant to global shocks" (Textiles Strategy, 2022).

This strategy draws particular attention because its objectives and actions are in some way related to the second-hand market. Its vision for 2030 specifies that textile products commercialized within the EU should be "durable, repairable and recyclable", also addressing that "fast fashion is out of fashion". These two vision statements, per se, constitute a big step towards a more sustainable Europe supporting indirectly second-hand clothes. However, it goes further than that.

This strategy defines different actions; among them, it states that all garments should be designed to last longer and be easily repairable and recycled, that overproduction and overconsumption must stop, or that the destruction of leftovers must be discouraged and limited. The destruction of unsold or returned garments was, until recently, a widespread practice in fast fashion companies, which found it cheaper to destroy these garments, due to the complex logistical process. This process, referred to in the industry as "reverse logistics", is unpredictable in terms of the number of garments returned, their condition, or whether they are the garments that were meant to be returned (Doyle, 2021). In most cases, it would involve the creation of a logistics line solely for returned garments where garments were checked, cleaned, packed, and returned to the usual logistics centre. This investment is not cost-effective for most companies that opt for product destruction. However, the European Commission is pledged to end this practice. In so doing, the *Eco Design for Sustainable Products Regulation*, proposes to make it compulsory for all large textile companies to create a declaration with the specific number of textiles and garments that are destroyed or wasted and what is done with all of them.

A boost is also envisaged for garment reuse initiatives, supporting local and sustainable trade. The European Commission states that this type of business "creates 20-35 jobs per 1,000 tonnes of collected textiles with a view to re-use" (EUR-Lex, 2022). For this reason, it will therefore seek to create measures that support the growth and circularity of such initiatives, while also encouraging partnerships with other companies with a greater impact, creating a mutual benefit.

All these measures are expected to significantly boost the second-hand market. In many cases, as it will be seen in the following section, companies prefer to donate leftovers rather than make the investment of creating a "reverse logistics" (Dopson, 2022) and, even though these products are not really second-hand as such, they will benefit the second-hand industry.

2.3. Advantages and disadvantages

The main advantages and disadvantages of second-hand apparel are here summarised. In this regard, one of the fundamental issues to consider is would be whether there are enough textile products to sell in the second-hand fashion market and where these products may come from. Even though what was stated in Chapter 1 would allow to answer these questions, as it seems that there is a large amount of clothing available in this field, it is going to be clarified it a bit more.

According to Halliday (2018), it is estimated that around 811 million garments remain practically unused in consumers' wardrobes only in the UK. But without resorting to people's wardrobes, only in the United States around 36 billion garments are thrown away every year, of which it is estimated that 95% could be recycled or reused. Therefore, from this it can be deduced that there is a large stock of products that could be sold. That´s why this would not be a drawback, but an advantage for the feasibility of the second-hand fashion industry.

Another major advantage that second-hand clothing has over new clothing is its environmental impact. Analysing the ecological footprint of both (*ThredUp*, 2019), the carbon footprint of first-hand clothing is 21 pounds of CO_2, plummeting to 3.7 in the case of second-hand clothing, thus reducing its carbon footprint by 82%. The average energy demand, in kWh, is 38.8 for new clothes and 4.8 for second-hand clothes, and the most relevant data is that 78.5 gallons of water are used in the production of a new garment and 1.2 gallons for a used one. This data is created with the assumptions that the garment is purchased from *ThredUp* and that when the garment completes 30% of its useful life it is susceptible to be reused.

Moreover, as James Reinhart of *ThredUp* stated, "mass market or luxury, if people can find a high-quality product for much less, they'll choose used" (*ThredUp*, 2019), so there is potential for selling second-hand garments. Based on this, what it is interesting to finding out is to what extent a buyer would save money by purchasing a second-hand garment. In this regard, in 2020 it was estimated that an average second-hand shopper could buy about seven used items for the price of buying one new. It is also estimated that in the last decade consumers have saved around $390 billion through their second-hand purchases.

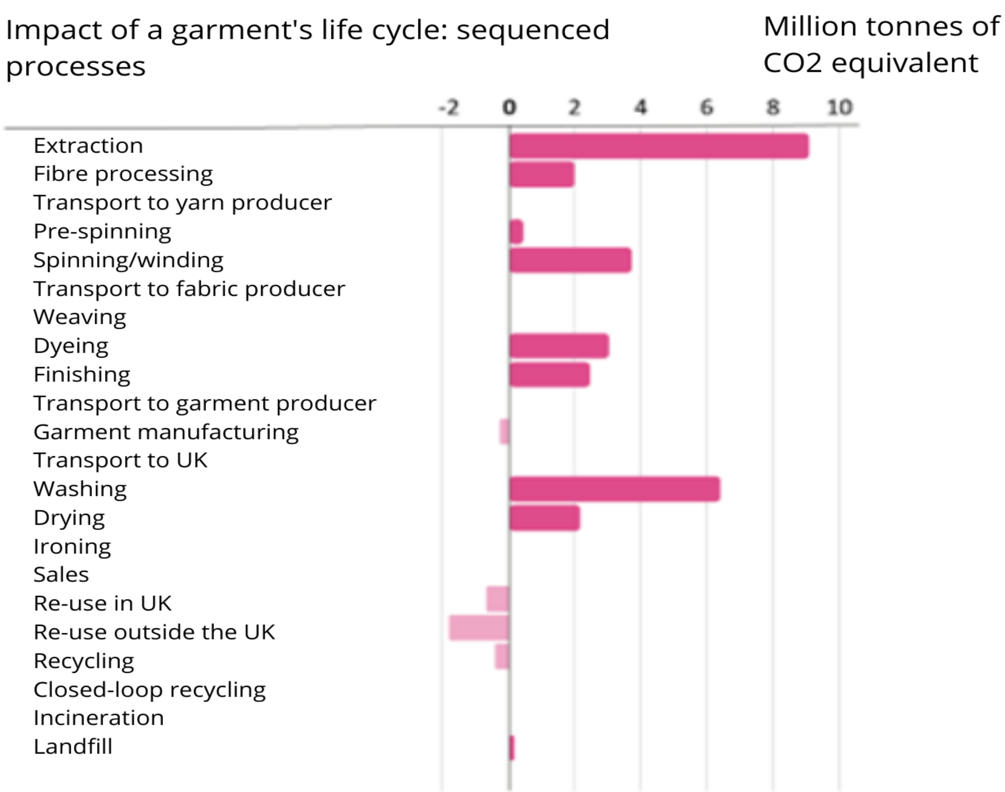
On the negative side of second-hand clothing, there is a major drawback, mainly at the level of marketing. Second-hand clothes cannot be sold in the same way as first-hand clothes. In the words of Cathaleen Chen, “the second-hand market is booming, and brands are piling in. But selling pre-worn clothes online is challenging. Every item must be sorted, priced, photographed and described in a listing. Resellers have giant warehouses where that work is automated. With resale far outpacing the growth of the overall fashion sector, brands must consider their options” (Chen, 2021).

In the case of first-hand clothing, a collection is created with certain garments. For the subsequent sale of these garments, two branches that cannot be applied to second-hand clothes con be seen. Firstly, for selling online, in the case of first-hand garments it is enough to take photos of the garment and know the stock in sizes and colours. Moreover, as they are mass-produced garments, the measurements are more generic. Thus, a large number of these garments can be sold just by means of an image. In the case of second-hand garments, each garment is unique and can have different effects and patterns. Therefore, each garment requires individual images, individual measurement, and individual description. This requires a greater logistical effort, as it is handled garment by garment and keeping track of them is more complicated -except in those stores that sell by weight- and greater time. Added to this, the publication of a garment in the fast fashion industry means the potential sale of thousands of items, whereas in the case of the second-hand industry quantities are limited.

The same can be extrapolated to stores, because in a second-hand store you want to be able to display as many items as possible because they have nothing to do with each other. On the other hand, in fast fashion stores many garments can be saved in the warehouse, avoiding having to over saturate the stores with items.

It is worth noting that, although it was mentioned on several occasions that second-hand clothes are more sustainable, they still pollute (Moda Re-, 2021). This is because even though they are already existing garments, their sorting and distribution still have an environmental impact. Observing from a global perspective, it is true that the overall emissions from creating a new garment to recycling vary quite a lot and are higher than those involved in the creation of a new garment, as can be seen in Figure 2.

Figure 2. Impact of each stage of the textile process on the carbon footprint of UK clothing consumption in tonnes of CO2 equivalent (2016)



Source: Moda Re- (2021)

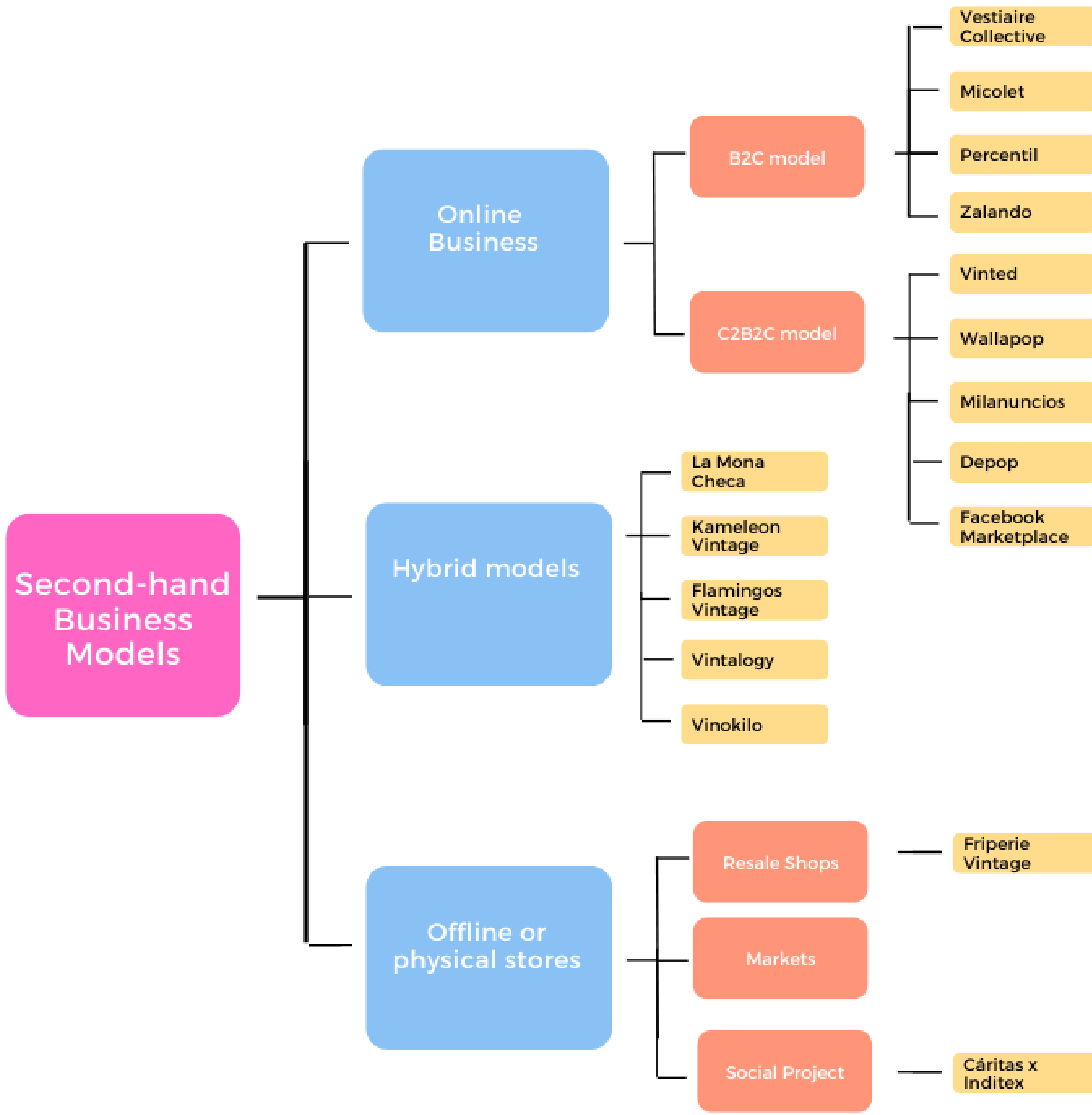
2.4. Main business models

According to Zaman *et al*. (2019), there are three main types of second-hand stores: consignment stores, thrift stores, and consignment online stores.[1] These authors point out that customers' profile and shopping habits vary across the different types of stores. The profile of customers will be characterised in Chapter 3, but in what follows of this section, the classification of second-hand stores in Spain will be detailed. Although the classification proposed by Zaman *et al*. (2019) works for many different countries, it would be slightly different for the Spanish case. In Spain, second-hand is a growing market, which results in less physical options for buying those items, as it will be seen. Therefore, in what follows, as can be seen in Figure 3, it is propose an own classification of second-

[1] Consignment stores are those normally for-profit companies, thrift stores are those that sell used items mainly relying on local donations, and online consignment stores are those consignment stores that operate online (Zaman et al., 2019).

hand stores in Spain based on their presence: online stores, physical stores, and hybrid stores (i.e., the ones that combine e-commerce and physical stores).

Figure 3. Second-hand business models in Spain



Source: Own elaboration

- Online stores:

  Online stores include two main type of businesses:

- Online business-to-consumer (B2C). This group include online business models in which garments are supplied to the company in different ways, such as through donation, transfer, or direct purchase from individuals, or through the purchase of lots of clothes at auctions or similar. In these cases, it is common to have the garments filtered by the brands and published directly on their websites. In this type of websites, search filters tend to be especially useful, and descriptions are objective. When the buyer purchases the product, the process is the same as for a regular online purchase. In this type of company, there are two clearly differentiated models in the case of products received from private individuals. The first one, where the private individual who wants to sell the products sends the products to the company and the company gives a power of attorney to the user. This means that, although it is the company that sets the price, if the product does not sell, the user can decide what to do with it. The second model, which is used by Vestiaire for example, is where the product is sent to the company once it is sold. In this case the company checks the products and then sends them to the user who bought them. In the latter case, if the user who bought the product does not want it in the end, the company keeps it, since once it enters their system, the initial seller makes the payment, and the company sells it on its website. This type of method does not allow a chat with the seller or negotiate the price or conditions of sale.

  Some examples of worldwide online companies, also operating in Spain, which meet this definition are:

  - *Vestiaire Collective*. It is a French company that sells second-hand luxury goods. It has more than 23 million users and a Gross Merchandising Value (GMV) of more than 916 million euros (Modaes, 2022b). In this case, due to the type of product being sold, *Vestiaire Collective* needs to inspect the potential product before publishing it, as only certain brands (i.e., the luxury ones) are allowed. Therefore, when a sale is made, the product is sent by the individual to *Vestiaire Collective*, which verifies the product before sending it to the buyer. Although in this case it comes from a private individual, it is considered as a B2B because of the filter that is applied. When the garments are sent to *Vestiaire Collective*, as long as they are authentic, the company buys the product to keep it, whether the final buyer keeps them or not. In the case of Vestiaire, it is considered a B2C and not a C2B2C because although the product enters its system only once it is sold, its intervention is not limited to being just a portal. C2B2Cs are portals that simply let individuals put their products on sale and take a commission for them. In the case of Vestiaire, they have an authentication system and take care of all the after-sales service, something that does not happen in other companies. And, what defines Vestiaire as B2C, is that they sell the products they buy, they don't just let individuals sell, they also as a company sell second-hand clothing.

- *Micolet*. This company sells donated or loaned clothes. Users can send clothes, a minimum of 20 garments, which meet the company's requirements and *Micolet* will be responsible for putting them on sale and setting the price. After some time or if the user does not agree with the price, the user can ask for their clothes to be sent back, paying the shipping costs. If the user does not want the garments or if it is a donation, after 6 months the unsold garments will be given to an NGO. In the case of donations, the money collected from the sale would be given directly to an NGO of the user's choice. *Micolet* takes a percentage of the profit collected from the sale of the garments (*Micolet*, 2021).
- *Percentil*. This company is pretty similar to *Micolet*, with the only differences being that the minimum shipment is 10 garments and there is no option to donate the garments (*Percentil*, 2022).
- *Zalando* or *Arizona Vintage*. These are other examples of companies selling second-hand clothing in Spain. It is also worth mentioning the project that *Hugo Boss* is going to launch at the end of the year in which private individuals will be able to offer items for sale on its website. But these products will be from users who have already used them, with *Hugo Boss* acting as an intermediary, reviewing the garments, and taking care of part of the sales process. (Modaes, 2022a).

- Customer-to-business-to-consumer (C2B2C[2]). This group includes online business models where the company acts as an intermediary between the seller and the buyer, as products are sold and bought by individuals. This process starts with the individuals publishing the description and photos of their products and deciding on the prices. Search filters may not work properly due to inadequate descriptions, or due to the fact that the same product can be published by several individuals at

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[2] Consumer to business to consumer (C2B2C) is a business model that is commonly associated with e-commerce transactions. In C2B2L, a business acts as an intermediary between two consumers who exchange goods. This exchange is a business transaction in which one of the individuals acts as a seller and the other acts as a buyer. C2B2C is a common model online, where many sites provide a platform over which two parties can conduct business with each other (Techopedia, 2022)

different prices or in different states. Once the buyer makes the purchase decision, he/she can (a) make the payment directly or (b) write to the seller to resolve any doubts or negotiate the price, which is quite common. At the time of making the payment, they buyer will see a special feature: the insurance for the buyer. These are the costs that the platforms charge for managing the order. The money is retained until the buyer receives the product, and only when he/she confirm that it meets its description, the seller receives his/her money. In case of any problem, the buyer's insurance will come into play.

Some examples of worldwide C2B2C companies, also operating in Spain, which meet this definition are:

- *Vinted, Wallapop* and *Milanuncios*. All three operate in a pretty similar way (Ayudaley, 2020), with *Vinted* being the most focused on the textile sector.
- *Depop*. One of the world's largest companies for buying and selling second-hand clothes. It has more than 15 million users, 90% of whom are under 26 years old (Huber, 2020; Packlink Blog, 2020). This app is like a social network.
- *Facebook Marketplace*. It is a platform anchored to the *Facebook* social network (Hootsuite, 2022). It works in a similar way to *Wallapop* and *Vinted* i.e., the individual publishes an ad, later reviewed by the platform, and whoever wants to buy needs to contact the advertiser. But this is as far as the similarities go because what comes after the purchase differs from the other platform. In Spain, *Facebook Marketplace* does not allow shipping and, therefore, does not offer purchase insurance. The positive side is that it does not take a percentage of the purchase, but it does offer adjusted shipping prices. It also allows to report a seller as a way to avoid scams.

- Hybrid stores. These shops have a website or online platform for the sale of their products. In addition, they have a physical store where they sell their products. This business model uses kind of a multichannel (or omnichannel) strategy. Some examples include:
    - *La Mona Checa*. It is a store in located in Malasaña (Madrid) and specialized in vintage items. It sells both on its website and in its physical store (*La Mona Checa*, n. d.).

- *Kameleon Vintage*. Located in Santiago de Compostela (Galicia), it is pretty similar to *La Mona Checa*. This company also sells wholesale batches of garments (*Kameleon Vintage*, 2022).

- *Flamingos Vintage Kilo*. Company with e-commerce and physical stores. It sells garments with an American aesthetic, received from the United States, by the kilo. This company has several shops in Spain in cities such as A Coruña or Barcelona (*Flamingos Vintage Kilo*, n. d.).

- *Vintalogy*. Quite similar to *Vestiaire Collective*, it sells luxury goods both on its website and in its physical stores (*Vintalogy*, n. d.).

- *Vinokilo*. It sells online and offline. *Vinokilo* is specialized in organizing second-hand clothing sales events by the kilo all over Europe (*Vinokilo*, 2022).

- Offline or physical stores

  Offline stores comprise different type of physical stores, detailed below:

  - Resale shops. One of the most common models for selling second-hand clothing. Due to the large number and great diversity of garments handled, many businesses choose to only sell offline. Within this it can found the following example:

    - *Friperie Vintage.* Located in Madrid, it sells second-hand clothes that, sometimes, the company customizes. Occasionally, this store uses Instagram to try to encourage sales (Méndez, 2017).

  - Markets. One of the most traditional and oldest forms of selling second-hand goods. According to the Real Academia Española (RAE)'s dictionary, a market is "made up of street stalls that are set up every, so often or on certain days of the week/month in an open-air location and where products are generally sold at low prices" (RAE, 2022). Markets include stalls of professional sellers, as in Spain a permit is required to participate in this type of market, who sell to private individuals, fitting the definition of B2C business (Cabezas, 2019). In some places, flea markets are also created in shopping centres or multipurpose spaces (Renatta&go, 2021). There are several quite famous markets in Spain, such as *Sant Jordi* in Ibiza, *El Rastro* in Madrid, the *Mercado de Avenida del Cid* in Valencia, or *Els Encants* Vells in Barcelona, where auctions are also held (Pita, 2021).

- Social Project. This category includes the “undertaking of solidarity actions aimed at improving one or more aspects of a society in which it exists, thus strengthening the sense of citizenship, or the social understanding of citizens” (IGI Global, 2022). One example of social project would be:

  - *Moda re-.* This is an initiative launched by the NGO *Cáritas*, with the support of *Inditex*. *Cáritas* collects used garments from individuals through its various donation points. These garments are taken to a processing centre, where they are separated into (a) those that can be reused and therefore sent to *Moda re-* stores, and (b) those that cannot be reused, but can be used to make new fabrics.

    Mode re- stores allow people at risk of social exclusion to shop at zero cost: not in the case of the remaining customers. As for the fabrics, they collaborate with different companies such as *Mango*, with which they produced a collection of jeans with 20% of the material reused, and they have also carried out collaborative projects with *El Corte Inglés*. The *Moda re-* garments are only available at its physical stores.

3. Determinants of second-hand clothing consumption

According to *ThredUp* (2021), around 36.2 billion of worldwide buyers purchased a second-hand fashion product in 2021 and potential buyers are expected to number 118.8 million in the coming years. Moreover, in 2019, 76% of individuals who have never sold their clothes would be willing to do so, with this figure rising to 87% in 2020.

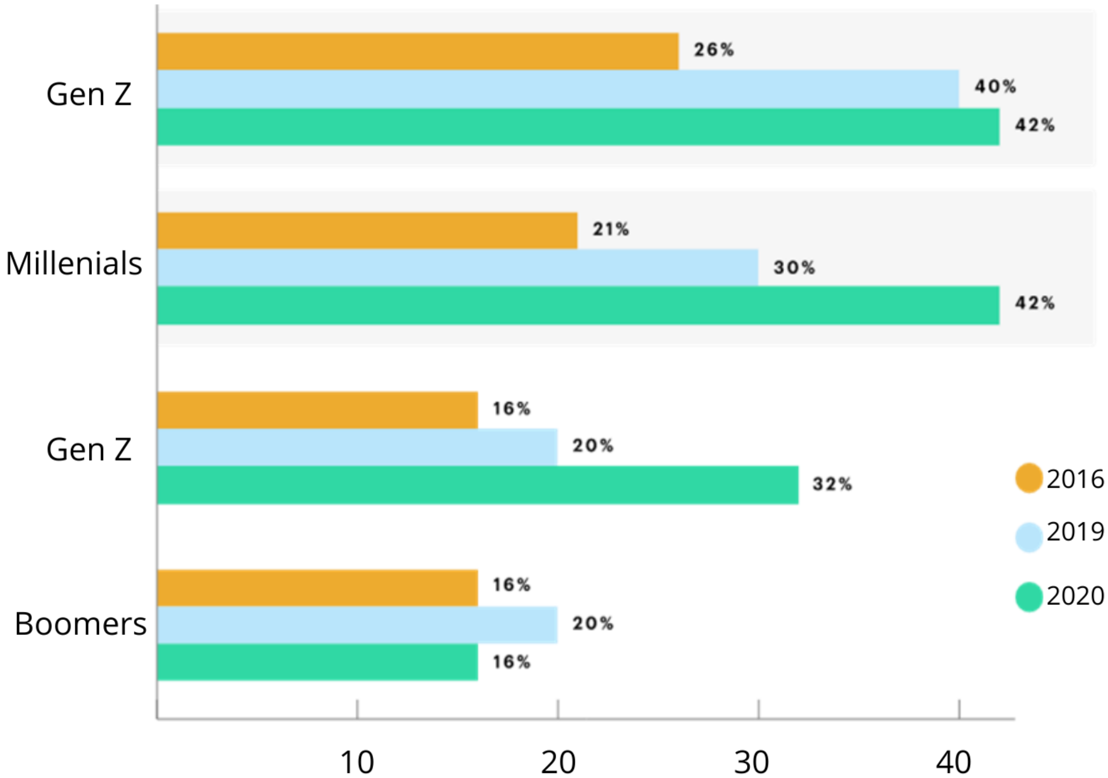
Data evidence a clear paradigm shift in the apparel consumer. But, to better understand why this shift in consumption patterns is taking place, the factors that determine the consumption of second-hand clothes need to be analysed. These factors are diverse and can be classified into five main categories: demographic, economic, social, psychological, and environmental factors. This third chapter will address the analysis of these five groups of factors, together with the possible effects that COVID-19 may have had on this type of consumer. In short, this chapter will attempt to identify which are the main factors affecting the purchasing decision of second-hand clothing.

3.1. Demographic factors

Firstly, it is possible to establish an age profile for this type of consumer. While it is true that the age range of potential buyers of second-hand clothing is widening, there is a clear difference between generations. If Baby Boomers are compared -those who were born between 1946 and 1964 (Quiroa, 2022)- with Generation Z or Gen Z -those who were born between 1994 and 2010 (Hernández & Terrasa, 2018)-, the latter are, as compared to Baby Boomers, 165% more likely to consider buying second-hand before buying a new item (*ThredUp*, 2021). In addition, the concept of ownership is diluted, making Gen Z 65% more likely than Baby Boomers to consider the ownership of garments as temporary and, consequently, Baby Boomers 33% less likely of resale a product before throwing it away.

As can be seen in Figure 4, in the period 2016-2020 the percentage of second-hand apparel consumers experienced a greater increase in the case of Millennials -those who were born between 1981 and 1993 (Hernández & Terrasa, 2018)- and Gen X -those born between 1965-1980- (100% increase in both cases), followed by that of Gen Z (61.5%). Evidence suggests that the consumption of second-hand clothing has a generational factor. The youngest generations -i.e., Generation Z and millennials- currently dominates, but it is possible that in a couple of years it will be the next generation, since, in view of the analyses carried out, it is a new mentality that is gradually gaining ground in society (*ThredUp*,2021).

Figure 4. Percentage of consumers of second-hand apparel by generation (2016-2020)



Source: *ThredUp* (2021)

As shown by Nawaz *et al.* (2021) there is a relationship between compulsive shopping and second-hand clothing purchases whereby consumers of second-hand clothing tend to start from more reflexive processes. Therefore, some factors in relation to their buying process will be discussed because they could be related to the consumption of second-hand clothes, as it will be clarified in the Chapter 5. Another of the most relevant factors, which at first sight may seem secondary, is marital status. Marital status has a truly relevant weight in compulsive shopping (Ugbomhe & Adomokhai, 2021). According to this report, compulsive shopping is more likely to occur in single people than in married people. This is because single people tend to shop more frequently but buy less, looking at items without purchasing them. In addition, there is a significant difference in shopping between individuals with and without children. Mothers, on average, spend 53% more money on new clothes than the average consumer. It is therefore very relevant that one in two women with young children plan to spend more money on second-hand clothes in the next 5 years, the biggest switch to second-hand clothes in any social group (ThredUp, 2021). Therefore, there is a relationship between marital status and second-hand consumption, with married people being more likely to buy second-hand apparel.

3.2. Economic factors

In relation to economic and financial factors, several can be highlighted. Firstly, as regards price, it should be mentioned that second-hand items use to be less expensive than new items. In this regard, as an example, 79% of the British, 27% of the Swiss, 66% of the Americans and 81.1% of the Belgians would prefer to make a purchase of a second-hand item if there is a saving (Hristova, 2019). As mentioned above, this would encourage certain profiles, such as mothers, to choose these garments (*ThredUp*, 2021). Secondly, as regards the search for information about the product and the comparison of its price, is usually favoured by online shopping, allowing consumers to compare prices for the same product on several websites (The Balance Editor, 2021). If this is extrapolated to the second-hand market, it allows for greater savings and comparison, because it is possible to find the same item for quite different prices -if not exclusive products are considered. The lowest price usually leads the consumer to finally buy the product, as stated by Colasante and D'Adamo (2021).

Although the economic factor is a determining driving force, the opposite reasoning can also be argued. According to Greg Petro (2021), "the younger generations are willing to spend the extra money for a more sustainable product instead of purchasing a cheaper unsustainable product". Specifically, in 2015, 73% of millennials were willing to spend more money on products that were sustainable. This begs the question: is second-hand clothing bought because it is cheaper or because it is the most affordable among the sustainable options? Although it may seem a slight nuance, it establishes a very different profile. On the one hand, people for whom price is the dominant criterion in making a purchase decision, thus opting for the most inexpensive one; and on the other hand, users for whom sustainability is the most important criterion, but that also consider the price in making a purchase decision.

Despite all this, Brummer (2020) concluded that economic factors were no longer as relevant as in previous years, indeed acknowledging that the economic factor was one of the least relevant. This author states that second-hand clothing is perceived as a trend, so social factors would be more important. On the other hand, other factors that will see later, such as the shopping experience or the uniqueness of the products have a greater weight.

On how the employment or income situation affects the purchase of second-hand clothes, the study by James *et al.* (2010) will be used. These authors noticed that there is a relationship between more difficult economic periods and shopping habits. The evidence found suggest that the lower and middle-income classes (i.e., the ones including pensioners, or people with precarious jobs or part-time jobs) shop more frequently in second-hand shops. However, people with a higher purchasing power opt for buying new items or buying in vintage stores when purchasing second-hand clothing.

Finally, purchasing power is related to impulse buying (Ugbomhe & Adomokhai, 2021). In this report several articles can be found that reinforce the theory that impulse purchases are more common among shoppers with higher purchasing power. This is explained by the fact that shoppers with greater purchasing power will find it easier to afford the payments associated with impulse purchases. Furthermore, as shown by Nørup *et al.* (2019) in countries with lower purchasing power such as Mozambique, Malawi or Angola, second-hand purchases are the only option. Due to the poverty situation, they do not consider buying new textiles. Although this is not the same situation as in Spain, it does provide an approximate view of how buyers with less purchasing power may perceive this type of garment. This is reinforced by Norum and Norton (2017), who state that higher purchasing power is related to lower purchases of second-hand clothing in the US. This is because of the prejudice towards these types of garments, which are perceived to be of lower value.

3.3. Social factors

Within the social factors, social networks, and the influence they have on consumers and their purchasing decisions stand out. In recent years, there have been several campaigns focused on environmental awareness through the consumption of second-hand clothing, promoted by, among others, *H&M*, which launched a special section for these garments on its website (Ringstrom, 2021) or *Intermon Oxfam*, with an awareness campaign for which they counted on the actress Sienna Miller (Oxfam, 2021).

Another key social factor is that second-hand clothing is nowadays considered trendy, as Brummer (2020) pointed out. The 'trend' factor makes the consumer more likely to buy (The Fashion Starter, 2021). Even though second-hand clothing is nowadays considered trendy, there is another relevant aspect to highlight. In a study conducted by ABC News (2022), it was found that the biggest difference between first and second-hand consumers was that the latter were style conscious. Until now, several articles from *ThredUp* and *The Fashion Starter* had suggested that the trend factor could constitute a relevant point. In contrast, the ABC News (2022) highlights that people with higher style-conscious scores were more likely to buy second-hand clothes than other options. Style-conscious consumers are described as consumers who prioritise clothes that complement their personality, which are part of their style, thus looking for original and unique garments. Treasure hunting, considered as the thrill of discovering unexpected treasures at low prices (Fu *et al*., 2022) also highlights this characteristic of second-hand clothes. This is interesting given that these are two different types of purchases: one more compulsive and the other more meditated. Second-hand clothing can encompass both, just as first-hand clothing does. But, although it is true that second-hand fashion can respond to both, it will be interesting to check later, through the empirical analysis of this work, which one prevails over the other.

With respect to other social factors, clothing plays a very relevant role in people's social position and feeling of belonging to a group or society. Acquiring on-trend clothes, following a similar social status to the social category to which one aspires, is a necessity for many people (Medvedev, 2022). Furthermore, second-hand clothes favour a redistribution of wealth on the social scale, thus allowing people who are in lower social classes of society to have the same goods as someone from a higher social class in terms of wealth and purchasing power (Freestone, 2021). This dilutes the characteristics that define a person as high social class, such as a certain brand, as someone with lower purchasing power can have the same product (Grechko, 2021).

3.4. Psychological factors

Regarding psychological factors, closely related to the emotional side, the analysis of a second-hand garment is quite different from a new or first-hand garment. Second-hand garments have already had a life, a use, a history behind them that, in many cases, is fascinating for the new owner (Cervellon *et al.*, 2012).

In this sense, the purchase of second-hand clothes could have a positive effect, on an emotional level, for the consumer. Haraldssonn and Peric (2017), in a study conducted among thrift store employees and volunteers, found that consumers felt good after making a purchase. This can be related to the expression "conscious shopping". Consumers related the fact that their purchase did not contribute to harming the planet and that was made in a responsible manner to feeling good. On a psychological level, this is a substantial change compared to normal shopping. Between 1% and 8% of purchases worldwide are compulsive purchases (Demetrivics *et al.*, 2016), motivated by unconscious shopping behaviour. This type of shopping is closely related to depression, alcohol dependence, nicotine dependence, or anxiety. Second-hand purchases start from a different basis, the buying process is slower and involves more reflection (Vernon, 2021; Walley, 2020), which favours the mental health of consumers (Crooked Driver Counselling, 2021). All of this can result in mentally calmer consumers and slower, stress-free shopping processes.

On the other hand, as indicated in the social factors' subsection, second-hand clothes allow people who would not usually be able to afford them to acquire luxury items (somehow, it allows social classes to be, at least partially, diluted). This could influence the psychological level for consumers, given that having luxury garments increases their self-esteem, as well as giving them the feeling of belonging to a group (Page, 2022). The exclusivity of some second-hand garments is also valued, because they need readjustments or certain alterations that make them unique, or simply because they are old garments that can no longer be acquired elsewhere. This feeling of originality of the product, giving it a unique character, increases the attractiveness of this type of garment. This is the case with antique jewellery, garments that are no longer manufactured or antiques, which can be even more valuable than if they were first-hand. This is also the origin of the "snob effect", which is the satisfaction a consumer gets from buying a product that is different from the masses.

As a consequence of the search for uniqueness and luxury items, an additional factor has been identified, treasure hunting (Cervellon *et al.*, 2012). As it was mentioned, treasure hunting is a relevant part of the consumer shopping experience and is a radical departure from traditional shopping (Brummer, 2020). This type of shopping experience is different and can only be provided by second-hand stores, creating stores with their own aesthetics and personality. Communities have been created around this concept, having a close relation with the psychological aspect of shopping second-hand (Treasure Hunting, 2022) and differentiating the process of buying second-hand clothes from the usual shopping process. In addition, there is a change in mentality regarding the concept of ownership, because the new generations, as stated in subsection 3.1 are losing the concept of ownership over products.

3.5. Environmental factors

If the focus is on environmental factors, the first factor that can determine the consumption of second-hand clothing is to try to ensure that a garment does not become waste, thus giving the product a second life. As already discussed, this greatly reduces its ecological footprint (Assoune, 2020), something that aligns with the values of multiple consumers. In addition, it also means giving new life to materials and preventing new raw materials from being used. This is both a complementary outcome of buying second-hand and an added factor. Second-hand consumers also value ethics in their purchases, and a proportion of them avoid buying second-hand clothing from brands whose values are not aligned with those of these consumers (Kang & Netguru, 2022).

It is also worth noting that younger consumers generally have a greater interest in sustainability and caring for the environment. In this regard, it is known that 43% of millennial and generation Z consumers have expressed that they feel responsible when buying or wearing fast fashion garments (Lundstrom, 2022). Linked to this interest, Haraldssonn and Peric (2017) found that all participants of their study claimed to feel a responsibility towards environmental well-being. The combination of responsibility and awareness makes the environment a relevant issue for the youngest generations.

A final factor worth highlighting is convenience. In a second-hand clothing order, all kinds of clothing can be purchased. Even, depending on the platform (e.g., *Milanuncios*), other products different from textiles. This possibility of acquiring a different range of products at the same point of sale means the negative environmental impact caused by travel or mobility is, to a large extent, minimised. In the shop, something remarkably similar happens. This makes the consumer of second-hand clothing see it as more convenient. In addition, these types of shops and outlets are constantly updated with a wide range of products that are not predictable, which would add another positive factor in many cases (Schipani, 2019).

3.6. Effects of the COVID-19 on consumers

Also, the COVID-19 pandemic has to be mentioned as it has changed the way consumers look at fashion, at least temporarily. In 2020, 33 million people bought second-hand clothes for the first time. Of these buyers, 76% plan to spend more money on second-hand clothes in the next five years. This also affected the way consumers perceive fashion, with one in four consumers less concerned about wearing the latest trends compared to the period before the irruption of the pandemic (*ThredUp*, 2021).

As a result of the pandemic, it can be observed that consumers are more careful about what they spend their money on, with 60% of the population refusing wasting money (*ThredUp*, 2021). An obvious consequence is that consumers are more concerned about the quality of their clothes, 43% of consumers have a greater preference for high quality garments (*ThredUp*, 2021)

3.7. Conclusions

After explaining all these factors, it should be noted that a consumer, when making a purchase of second-hand clothing, must decide which variables to prioritise. This can generate dissonance in a consumer as he/she is forced to choose between several competing aspects and may not find a product on the market that meets all his/her needs and/or expectations (Haraldssonn & Peric, 2017). Some authors such as Sharma (2014) consider second-hand fashion to be the solution to the dissonance that often exists between acquiring environmentally friendly products that are, at the same time, economical. It is worth noting that although second-hand clothes, as it can be seen, are a trend, they are not new. Many may be unworn, but most have a previous life and history. Therefore, for consumers who want clothes with the latest trends such as can be found in fast-fashion companies, second-hand clothes may not meet their needs.

What is clearly established is that second-hand consumers are looking for clothes with value, which help them save money. They prefer options that give them new products every time they buy, that surprise them when entering in the second-hand fashion stores, websites, or apps. In the words of Eliza Huber, "for Generation Z, thrifting is not just a way of shopping, it's a lifestyle. Thrifting is emblematic of the way Generation Z is getting off the beaten track. They want to be independent. They want to save the planet. They want to save money and make money. And they want to do it all in nice clothes that cost less than $10. Thrifting makes it possible." (Huber, 2020a).

4. Methodology

In the following paragraphs, the two main methodologies will be explained that have been used for the realisation of this project. On the one hand, the first thing that was done in this project was to establish a context through a literature review of different sources. And, on the other hand, with this data, it was used a quantitative methodology, based on the elaboration of a questionnaire. This questionnaire is focused on defining the profile of the second-hand consumer in Spain, although it also defined why non-consumers chose not to buy these garments. In addition, it was included a short section addressed to consumers in which they were asked about the possible effects that the COVID-19 pandemic had on them.

Regarding the structure of the questionnaire, it is divided into an initial control question and 4 subsequent sections. The first question asked was to separate consumers of second-hand clothes from non-consumers of second-hand clothes. From this point on, the questionnaire is divided into two distinct itineraries. The first one for consumers of second-hand clothes redirects them to sections 2, 3 and 4. The second route for non-consumers redirects them to sections 1 and 4.

Talking about the specific sections, as mentioned above, section 1 is addressed to non-consumers. In this section, the consumers were asked about the main reasons why they did not buy second-hand clothes, what factors might make them change their opinion, and their use of the garments. In Section 2, consumers of second-hand clothes are asked about various aspects related to their buying process, the number of garments they own, how many and how often they buy, etc. With this, the intention was to create a profile as detailed as possible to understand the consumer and their preferences. section 3 focuses on the consequences of the COVID-19 pandemic on the consumption habits of second-hand shoppers. Finally, section 4 is focused on collecting socio-demographic data on the respondents by asking them about their age, gender, employment status, income level, marital status, area, and place of residence. The most important question is where they live, which is fundamental because the questionnaire is focused on the Spanish market. The answers from outside Spain were discarded, the concrete number was one.

The questionnaire was developed using the online platform provided by Google, Google Forms, and the entire version can be viewed on the Appendix. Before starting with the structure, it should be noted that, although this project is conducted in English, the questionnaire is created in Spanish. This is because it is aimed at the Spanish population in general and if it were to be carried out in English, it could end up limiting the number of responses to be made.

For the dissemination of the questionnaire, there were different messaging applications used (WhatsApp and Telegram), social networks (Facebook, Instagram, and LinkedIn) and email (mailing lists of the Faculty of Humanities and Documentation and the University of A Coruña). Below a chronology with the dissemination actions of the questionnaire is shown (see Table 1).

Table 1. Chronology dissemination of the questionnaire

Date	Channel	Action
19/05/2022	WhatsApp	Distribution through contacts and groups
19/05/2022	Telegram	Distribution through contacts and groups
19/05/2022	Facebook	Post by myself
19/05/2022	Instagram	5 different stories created by contacts and me
20/05/2022	LinkedIn	Post
20/05/2022	LinkedIn	Post by Lucia Rey Ares
20/05/2022	LinkedIn	Post by Vanessa Mato Santiso
20/05/2022	Email	Distribution through the email list of the Facultad de Humanidades y Documentación
03/06/2022	Email	Distribution through the email list of the Universidade da Coruña

Source: Own elaboration

The sampling method used consists of a probabilistic sampling, and concretely, a simple random sampling. This type of sampling consists of using as a sample any person that can see the questionnaire (McCombes, 2019). Additionally, the data analysis was conducted with the support of *Microsoft Excel*.

The elaboration of this project started in February 2022 with the first chapter. This part was ended in March 2022. After the elaboration of Chapter 1, Chapter 2 and 3 were started to be written. This suffered delays due to the compatibility with the university internships. Due to this, it had to prioritise the Chapter 3 to be able to create the questionnaire on time. Chapter 3 was finished in May 2022. After this, Chapter 2 was finished while the survey was being distributed. The survey for this project was closed on 8 June 2022, from which point Chapter 5 was developed (see Table 2).

Table 2. Project timeline

Task	Initial date	Final date
Index	10/02/2022	20/02/2022
Chapter 1	03/03/2022	25/03/2022
Chapter 2	26/03/2022	08/06/2022
Chapter 3	26/03/2022	12/05/2022
Creation of the questionnaire	26/04/2022	19/05/2022
Chapter 5	08/06/2022	12/06/2022
Chapter 4	11/06/2022	19/06/2022
Chapter 6	11/06/2022	19/06/2022
Revision and deposit	19/06/2022	23/06/2022

Source: Own elaboration

5. Analysis of consumers (and non-consumers) of second-hand fashion in Spain

Having analysed what various authors have previously said about the main driving forces of second-hand fashion garments, the empirical section of this project will be explained now. As stated at the introductory section, the aim of this project is to establish a clear vision of the second-hand consumer in Spain. To this end, it has been decided to carry out a survey where both consumers and non-consumers of second-hand clothes were asked about their habits. In so doing, besides characterising the Spanish second-hand garment buyer, with the intend to be able to contrast the literature previously analysed with the results obtained from this sample.

5.1. The questionnaire

Our questionnaire started with a control question and then it was divided into four different sections. For the elaboration of this questionnaire different types of questions (e.g., multiple choice questions, Likert-scale and rating-scales questions, dichotomous and close questions, and open questions) were used. It should be noted that the questionnaire was carried out in Spanish even though this report is written in English. As the target audience is those people living in Spain, conducing the questionnaire in English could limit the number of responses obtained or the comprehension of the questions, so it was opted to use Spanish to draft the questionnaire. Full questionnaire is included in the Appendix.

At the beginning of the survey, a control question asking the interviewed if he/she has ever bought second-hand clothing was asked and, depending on the answer (yes, or no), the interviewed has do complete section 1 or section 2. Section 1 was made up of questions aimed at knowing the reasons why respondents do not buy second-hand apparel. Section 2 consisted of questions aimed at characterising second-hand apparel buyers. After section 2 was completed, survey respondents were invited to move on to section 3, that aims to get more information on consumer habits regarding second-hand purchases after the COVID-19 pandemic. Finally, section 4 was aimed at capturing respondent sociodemographic information.

This was done through a cross-sectional online survey using the *Google Forms* tool. This questionnaire had two different itineraries according to the profile of consumer, as mentioned above. The first itinerary was designed for non-consumers, starting with the control question at the introductory section, followed by section 1 and ending with section 4; the second itinerary was for second-hand apparel consumers, starting with the control question at the introductory section, followed by section 2, section 3 and section 4.

The questionnaire was distributed via instant messaging (*WhatsApp* and *Telegram*), social networks (*LinkedIn, Facebook*, and *Instagram*) and email (*Gmail* and *Hotmail*). Data collection took place during the third week of May 2022. The sampling method is a probabilistic sampling, and concretely, a simple random sampling. This type of sampling consists of using as a sample any person that can see the questionnaire (McCombes, 2019).

5.2. The sample

The population of this sample is composed of apparel consumers living in Spain. The analysis is limited to Spain because one of the aims of this project is characterising the Spanish consumers (and non-consumers) of second-hand clothing, as well as knowing the specific opinions in this geographical area. Within this population, it is understood that, for the most part, all people aged 14 or over are direct or indirect consumers of clothing

The initial sample comprised 216 responses but, after eliminating those completed by people from outside Spain, 215 responses remained.

Table 3 characterises the sample and summarises the responses to the sociodemographic questions (section 4). Most respondents (80.9%) are from Galicia and have an average age of 32,68 years. Almost half of respondents (47.4%) are aged between 21 and 30 years old, followed at a greater distance by those who are aged 31 to 40 (19.3%), 41 to 50 (13.8%), 51 to 60 (10.6%), less than 21 years (8.3%) and 61 or over (1.4%).

Women are the majority of respondents (70.4%) as compared to men (29.6%). Regarding educational attainment, 0.9% of respondents have completed primary education, 4.2% have completed the first stage of secondary education, 11.2% the second stage of secondary education, 17.2% vocational training, 35.3% have university studies, 21.9% have a master's degree, postgraduate degree, or specialisation, and 9.3% have a doctorate.

Regarding the employment status of the respondents, the majority are full-time employees (45.8%), followed by students (36.4%), part-time employees (8.4%), self-employed (5.1%), unemployed (2.8%), retired (0.9%), and disabled (0.5%).

Most of the respondents have a gross annual income below €49,999 (76.8%). Namely, those who have less than €9,999 are 17.2%, between €10,000-24,999 (36.3%), and between €25,000-49,999 (23.3%). The remaining percentages are divided among those who have between €50,000-74,999 (5.1%), between €75,000-99,999 (2.8%) and more than €100,000 (0.9%). Around one fifth of the sample (14.4%) preferred not to answer this question.

Regarding the marital status of the respondents, 68.4% were single, 21.4% were married, 6.5% were divorced and 0.5% were widowed. The remaining 3.3% are people whose marital status was not detailed.

Finally, as regards the level of population where the respondents live, almost half of them (53.2%) live in places with more than 50,000 inhabitants. The rest are very evenly divided between those with less than 5,000 inhabitants (11.7%), between 5,000 and 10,000 (17%) and between 10,000 and 50,000 (18.1%).

Some differences stand out between non-consumers and consumers with respect to socio-demographic variables. As can be seen in Table 3, there are more women among consumers than among non-consumers. In addition, non-consumers are older, with fewer people under 21 years of age and more users between 51 and 60 years of age. This corresponds to the previous chapter on age, where it was pointed out that it was the youngest people who were most willing to buy second-hand clothes. In the case of consumers, the most frequent level of education is bachelor's degree, in the case of non-consumers it is more evenly distributed among various education ranges with a higher number of PhD's. Regarding occupation, in non-consumers more than 50% are employed full time, but in the case of consumers more than 40% are students. This makes sense when looking at income levels, where more than 50% of consumers have less than €24,999 per year. Following that line, non-consumers have a purchasing power of between €10,000 and €49,999 per year. Both the employment situation and the income level correspond to what have seen previously. According to previous theory, lower purchasing power situations were related to buying second-hand clothes. It is worth noting that, contrary to what has been saw previously, there is a greater number of married people who do not buy second-hand clothes. Although it is true that this is not a radical difference, it is a greater number.

Table 3. Characterization of the sample

Variables	**Overall Sample (%)** (N=215)	**Consumers (%)** (N=116)	**Non-Consumers (%)** (N=99)
GENDER			
Male	29.6	21.6	39.2
Female	70.4	78.4	60.8
AGE			
Younger than 21	8.3	13.8	1
21-30	46.8	49.1	43.9
31-40	19.3	19.8	19.4
41-50	13.8	11.2	17.3
51-60	10.6	5.2	16.3
61 or older	1.4	0.9	2
LEVEL OF EDUCATION			

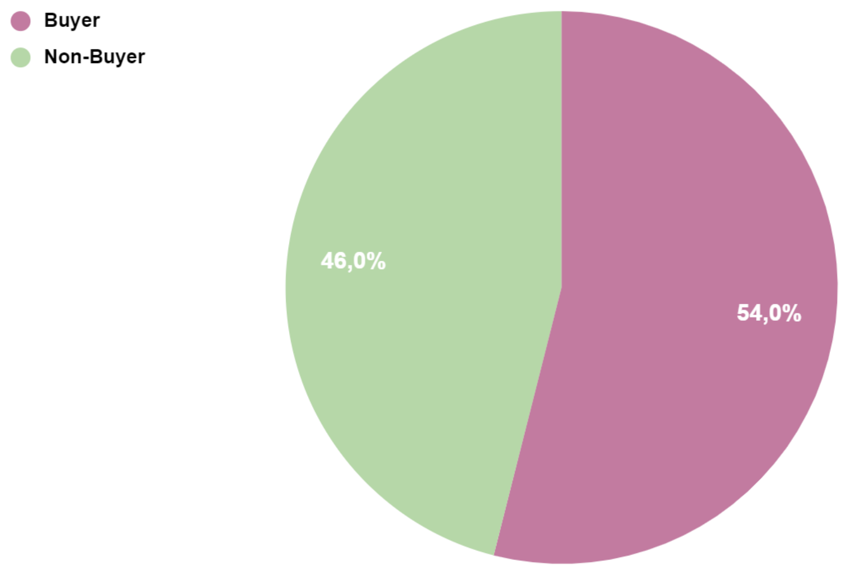
Variables	**Overall Sample (%)** (N=215)	**Consumers (%)** (N=116)	**Non-Consumers (%)** (N=99)
No studies	0	0	0
Primary studies	0.9	1.7	0
Secondary studies	4.2	3.4	5.1
High School Degree	11.2	10.3	12.1
Professional Training	17.2	11.2	24.2
Bachelor's degree	35.3	44	25.3
Master, postgraduate or specialization	21.9	23.3	20.2
PhD	9.3	6	13.1
OCCUPATION			
Paid employment (full-time)	45.8	38.3	54.5
Paid employment (part-time)	8.4	7	10.1
Self-employment	5.1	5.2	5
Not in the workforce	2.8	2.6	3
Retired	0.9	0.9	1
Student	36.4	46.1	25.3
Disabled	0.5	0	1
MARITAL STATUS			
Single	68.4	78.4	56.6
Married	21.4	13.8	30.3
Divorced	6.5	4.3	9.1
Widowed	0.5	0.9	0
I prefer not to answer	3.3	2.6	4
INCOME LEVEL			
From 1 to 9,999 euros	17.2	24.1	9.1
From 10,000 to 24,999 euros	36.3	32.8	40.4
From 25,000 to 49,999 euros	23.3	19.8	27.3
From 50,000 to 74,999 euros	5.1	6.9	3
From 75,000 to 99,999 euros	2.8	1.7	4
Over 100,000 euros	0.9	0.9	1
I prefer not to answer	14.4	13.8	15.2
AREA OF RESIDENCE			
Under 5,000 inhabitants	11.7	6.5	16.7
Between 5,000 and 10,000 inhabitants	17	26.1	8.3
Between 10,000 and 50,000 inhabitants	18.1	17.4	18.8
More than 50,000 inhabitants	53.2	50	56.3
PLACE OF RESIDENCE			
Galicia	80.9	78.3	83.3
Another Spanish region	19.1	21.7	16.7

Source: Own elaboration

5.3. The second-hand apparel non-consumers

After having characterised all survey respondents, the analysis will continue by seeing how many second-hand apparel buyers are. In this regard, the sample is quite balanced as 54% of respondents are second-hand apparel buyers, while the remaining 46% declare states that never shopped in second-hand clothes shops (Figure 5).

Figure 5. Percentage of second-hand apparel buyers



Source: Own elaboration

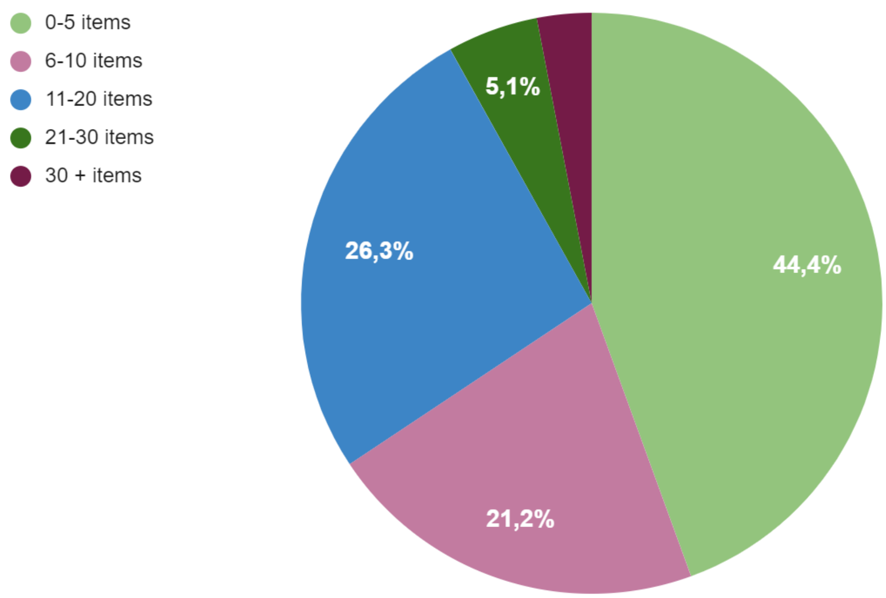
This section will start by analysing the non-buyers, aimed at better understanding the reluctance of Spaniards towards second-hand apparel fashion. But firstly, it should be clarified that in all questions that use a Likert scale from 1 to 5, 1 denotes "strong disagreement" and 5 “strong agreement".

Regarding the main reasons why the individuals of the sample do not buy second-hand apparel, on a Likert-scale from 1 to 5, respondents consider, with an average score of 3.27 points, that the main reason deals with the fact that buying second-hand garments is more challenging than buying new garments, because of issues such as the lack of size availability. Other reasons that non-consumers declare are that the difference in price between a second-hand garment and a new one is not worth it (2.7 points), that second-hand clothes do not fit in with the style of dress of the respondents (2.41) or that second-hand clothes do not follow the most recent trends (2.25). There is relatively more disagreement regarding the facts that second-hand clothes are not of sufficient quality (2.09), not hygienic (2.08), or related to poverty (1.58).

Second-hand garments have long been related to poverty or being worn-out or soiled, as Fitzgerald (2015) stated, but data evidence that, overall, nowadays, non-consumers of second-hand fashion have a low level of prejudice towards second-hand clothing.

Once the reasons that can dissuade Spaniards from buying second-hand clothing are known, it was interesting to find out how many items in their wardrobes they do not wear. This might give as an idea of how conscious is the consumer when buying garments. In this regard, evidence reflected that most of non-buyers (44.4%) only have between 0 to 5 items unused clothes in their wardrobes (Figure 6). After that, the percentages continue to decrease; 26.3% for those that have 11 to 20 unused clothes; 21.2% for those that have 6 to 10; 5.1% for those that have 21 to 30 items; and 3% for those that have more than 30 unused clothes.

Figure 6. Number of average unused clothes by non-consumers



Source: Own elaboration

When non-buyers were asked if they have ever thought that reusing unworn clothes from their wardrobes would be a good way to reduce their impact on the environment, 45.4% agreed, stating that they would also consider buying second-hand clothes. The remaining percentage is divided into 42.3% of respondents who do consider it would be a good method, but despite that would not be more willing to buy second-hand garments; 9.3% that considered that there are other, more effective methods to care for the environment; and 3.1% that did not consider the environment at all when buying fashion garments. Of the remainder, none are considering buying second-hand, but most are interested in reducing their environmental impact on the planet. The option of giving an alternative answer was also given and one of the respondents answered that he/she already gives a second life to their clothes by donating the ones he/she no longer uses to NGOs. From this, it can be deduced that, although initially all said they have never bought second-hand clothes, almost half would intend to buy these products in a near future.

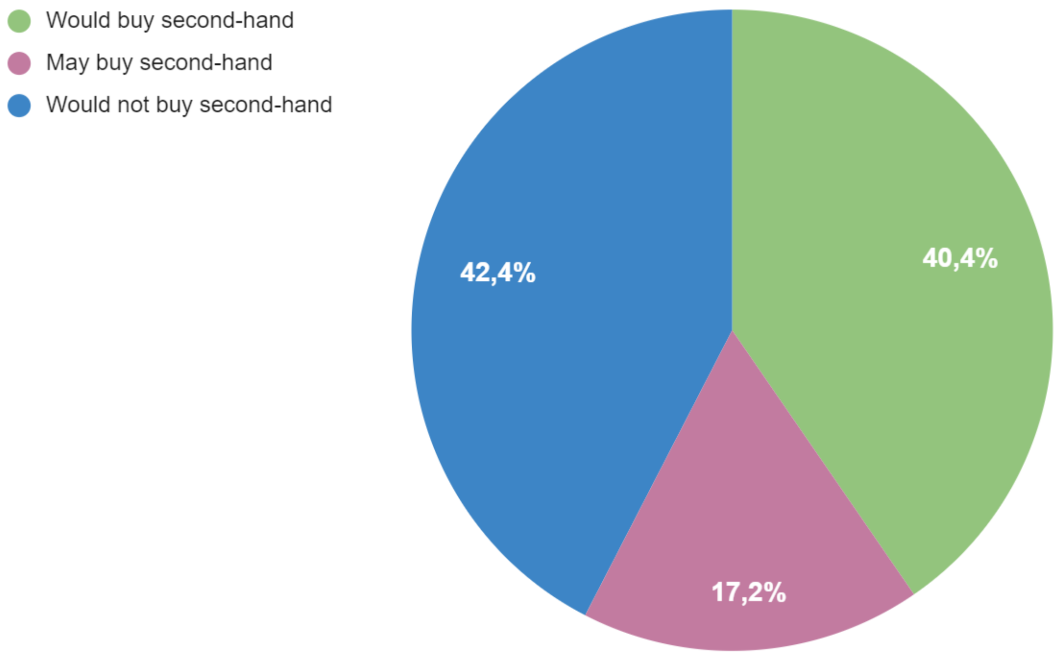
As previously mentioned, with an average of 2.7 on a Likert scale 1-5 on the level of agreement with the statement that price of second-hand clothing did not make a big difference compared to new clothes, it seems that price does not seem to be the main variable dissuading to buy second-hand clothing. But this will be explored in more depth with another question.

Namely, the respondents were asked whether the fact that second-hand clothes are, on average, cheaper than first-hand clothes would make them to buy second-hand. Less than half of the sample (43.4%) stated it would be a relevant factor and 13.1% admitted that the difference exists but is not enough; in case of a greater difference, they would buy second-hand clothing. On the other hand, 17.2% recognised that, although the differential exists, the value for money compared to a new garment is lower; and 26.3% stated that price is not relevant in their purchasing process. In this case, most respondents, once again, would be willing to buy second-hand clothes, in this case prompted by their lower prices. However, a strong prejudice about second-hand clothes is perceived among non-consumers: the price-quality ratio.

With this in mind, it is important to know what the value of a second-hand garment is for the consumer, beyond the monetary aspect. This question was raised aimed at finding out if this price-quality ratio is relevant and if is part of a problem that prevents giving a second life to these garments. Most respondents considered that second-hand garments have no less value (66.7%), with 56.3% stating that, despite its use, they have value; and 10.4% considering that they have a higher value because they are unique and different garments. The remaining 33.3% considered that they have a lower value due to their use.

ThredUp (2021) highlights the importance of government support for measures, such as the sale of second-hand clothing, which support environmental care. When non-buyers were confronted about whether they would be prompted to buy second-hand clothing if government would support it (Figure 7), a total of 40.4% admitted that it would encourage their purchases; 42.4% was hesitant; and 17.2% discarded this possibility. This evidence shows that governmental actions supporting second-hand clothing could encourage its consumption, because, potentially, more than 80% would consider buying second-hand products if they were promoted.

Figure 7. Effects of government measures in non-consumers decision to potentially buy second-hand clothing



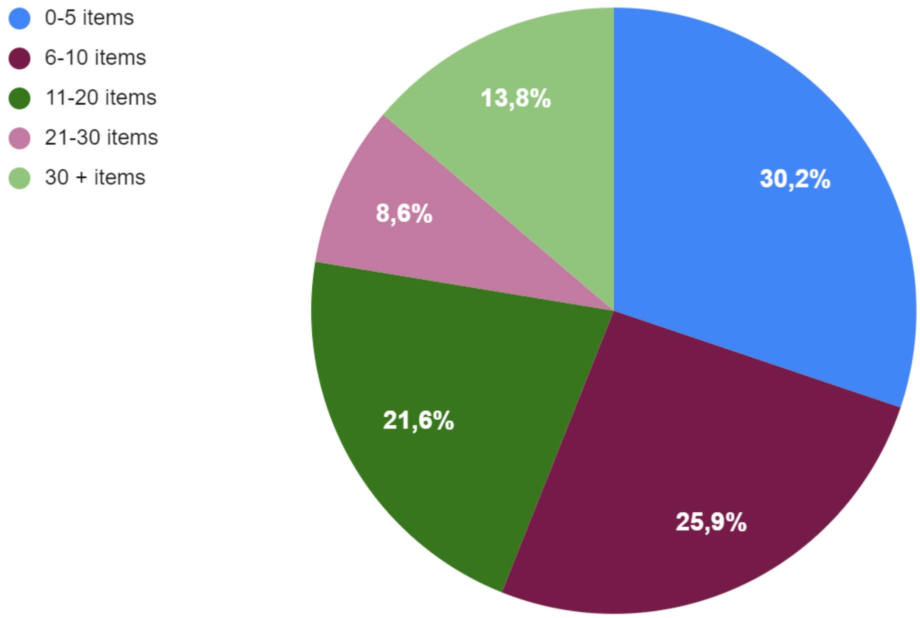
Source: Own elaboration

5.4. The second-hand fashion consumers

After analysing second-hand fashion non-consumers, focus is on second-hand fashion consumers, which constitutes the core of this project. To start with, let us focus on a question that is in common with non-consumers, i.e., the one of the number of unused clothes in their wardrobe, whose results are displayed in Figure 8.

In the case of consumers of second-hand clothing, the majority (30.2%) do not wear between 0-5 garments. The rest of the decreasing percentages are between 6 to 10 garments (25.9%), 11 to 20 garments (21.6%), 21 to 30 garments (8.6%) and, lastly, more than 30 garments (13.8%).

Figure 8. Number of average unused clothes by consumers

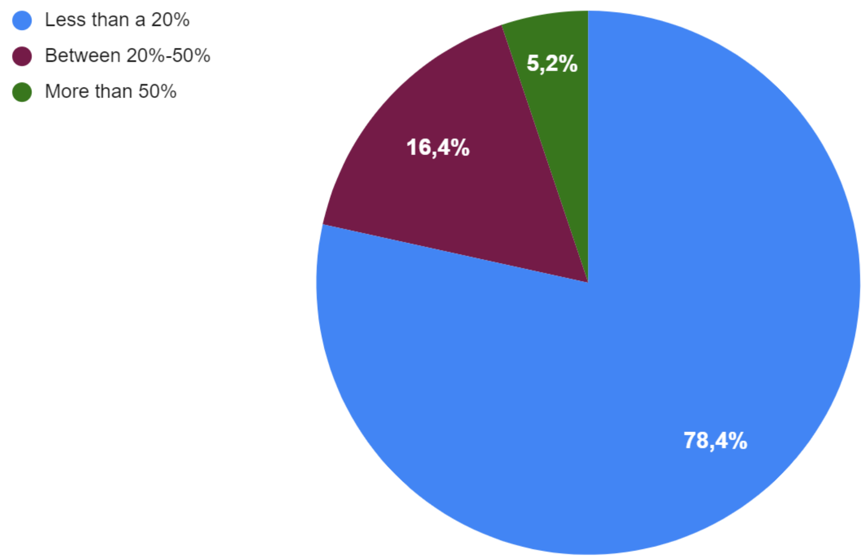


Source: Own elaboration

This contrasts with the result for non-consumers, who report that they have fewer items of clothing that they do not wear. This can be seen by comparing the 0-5 garments and 30+ garments percentages of garments they do not wear. In the 0-5 garment bracket, 44.4% of non-consumers selected this answer, whereas in the case of consumers the percentage reduces to 30.2%. In the range of more than 30 items, 13.8% of consumers selected this answer as compared to less than 3% of non-consumers. This shows that, contrary to what might be expected, second-hand apparel consumers tend to have more unworn clothes than non-consumers.

Continuing the review in the wardrobe of second-hand consumers, this time the focus is on the percentage of garments that come from the second-hand market (Figure 9). Of those surveyed, 78.4% stated that less than 20% of their wardrobe is second-hand; 16.4% had between 20% and 50% and the remaining 5.2% had more than 50% second-hand clothes. Although this might seem negative, it is a quite high percentage. Indeed, *ThredUp* (2021) estimated that in 2020 consumers worldwide had around 9% of second-hand garments in their wardrobe, expecting this percentage to double by 2030. In this case, evidence for Spain revels that 16.4% of second-hand consumers already had between 20 and 50% second-hand clothing in their wardrobes in 2022.

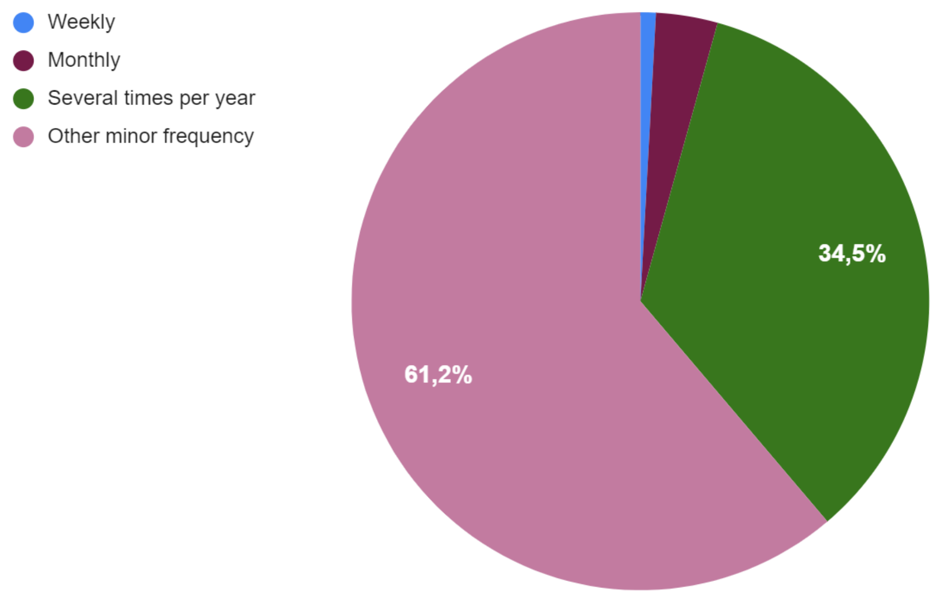
Figure 9. Percentage of second-hand clothes in second-hand consumer´s wardrobe



Source: Own elaboration

Our respondents were asked how often they buy at second-hand clothing stores as you can see in Figure 10. The majority (61.2%) answered less often than several times a year, followed at a much greater distance by those that buy several times a year (34.5%). From this it was seen that more than 90% of the respondents shop in a leisurely manner, spaced out over time.

Figure 10. Frequency of purchases at second-hand fashion stores

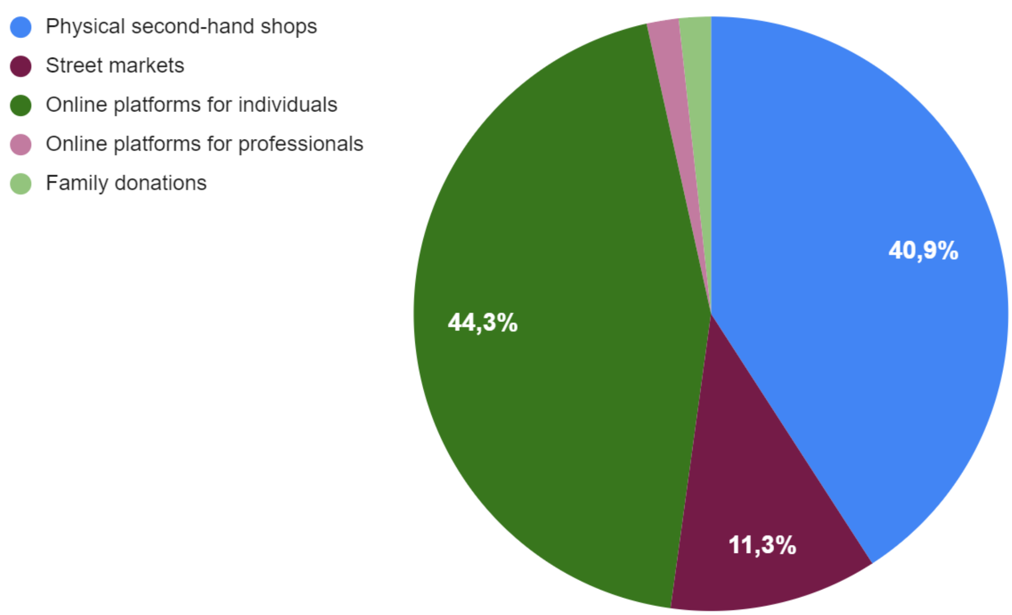


Source: Own elaboration

This evidence may be related to two factors mentioned above. On the one hand, the impulsivity of purchases, as more spaced purchases are related to less impulsive processes. And on the one hand, the percentage of second-hand clothes in consumers' wardrobe. A consumer who does not shop too often will take much longer to have a fully second-hand wardrobe than one who shops every week. Therefore, it could see a relationship between these two factors, although this may be confirmed later, when analysing when consumers started to buy second-hand clothes.

Knowing where customers buy second-hand garments will help us to understand whether consumers' needs are being met in the current market. Figure 11 reveals that online platforms of private individuals, such as *Vinted* or *Milanuncios*, is the more widespread option (44.3%). This fits with the current Spanish market, since, as summarised in Chapter 3, private online platforms have a large number of users. Physical second-hand stores are in the second position (40.9%). In more densely populated cities such as Barcelona or Madrid several options of this type were found, but in places with fewer inhabitants the options are more limited. Flea or street markets are in the third position, but as a much greater distance (11.3%), and lastly, professional online platforms (1.7%) that are in the fourth position. It is worth noting that the option for respondents to give other answers was given and three respondents indicated family donations as their source of second-hand clothes (1.7%).

Figure 11. Place of purchase of second-hand garments

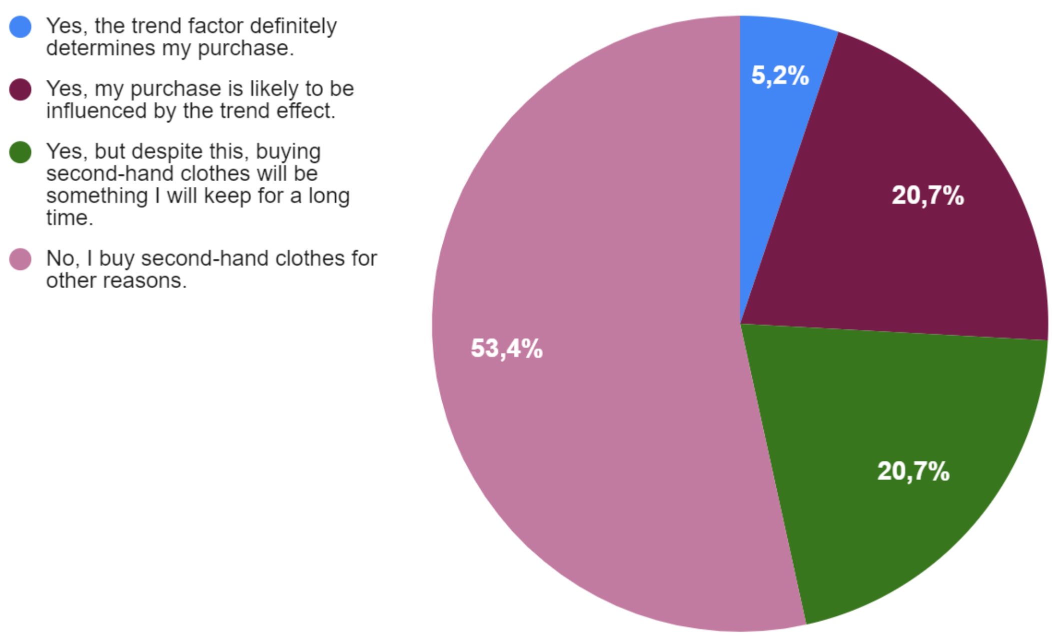


Source: Own elaboration

It was asked how important it would be to have the possibility to buy other products, such as furniture or books, when buying second-hand clothes, and on a Likert, scale ranging from 1 to 5, being 1 the lowest degree of importance, an average of 3.3 was obtained. This is not a determining factor, even though, as it was said for environmental factors, it is a positive one.

It seems that for now the market is adjusting to the needs of the customer and that eventually, being where a large percentage wants to buy, more physical second-hand shops will appear. But to know if second-hand clothing is really going to change the market, it is relevant to know if it is going to last over time. As it was discussed in the factors that define the consumer, second-hand clothing is a trend, and trends tend to be short-lived. That is why the consumers were asked if the fact that it is a trend influenced their purchasing process, being the results of this question summarised in Figure 12. Most respondents (53.4%) said no that they bought these second-hand garments for other reasons. In addition, 20.7% said that trend does influence their purchasing process, but it will continue to do so for a long time. The remaining 20.7% said that it does influence them in some way and 5.2% said that the main factor for buying second-hand clothes is that they are trendy. With this, it was obtained that more than 70% of those surveyed would buy second-hand clothes even if they were no longer in fashion (i.e., second-hand buying became less popular). This supports the market growth it was seen throughout this project.

Figure 12. Influence of trend factor for second-hand apparel consumer

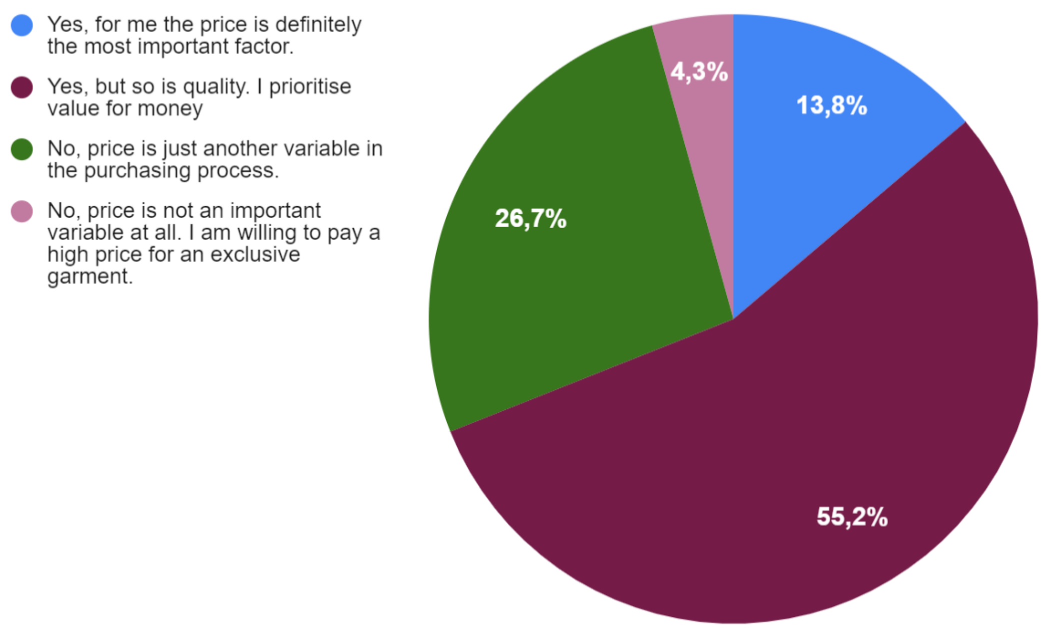


Source: Own elaboration

Respondents were also asked whether they valued treasure hunting in their purchasing process, as previous studies suggest that treasure hunting is a factor that is mostly positively valued by consumers. Spaniards also seem to consider this an important factor, as in a Likert scale from 1 to 5, 33.6% of respondents strongly agree and 31.9% agree on the fact that treasure hunting is a relevant factor when buying second-hand apparel.

As regards the effect of price on the buying process (Figure 13), half of the sample (55.2%) consider price to be a factor as important as quality in their buying process. This suggest that the stigma that second-hand clothes do not have quality is broken; a stigma that, however, non-consumer still consider to be true. One quarter of the sample (26.7%) considers price to be just another variable in their buying process, and 4.3% agrees on paying a higher price for an exclusive item. This fits with the definition it was given in the economic factors about the consumer. For most consumers, price is not the determining factor, with only 13.8% of consumers marking it as the determining factor in their purchasing process. In the case of non-consumers, as indicated in the previous section, 26.3% of them considered price not to be a relevant factor in their purchasing process; a slightly lower percentage than among consumers.

Figure 13. Relevance of price for second-hand apparel consumers

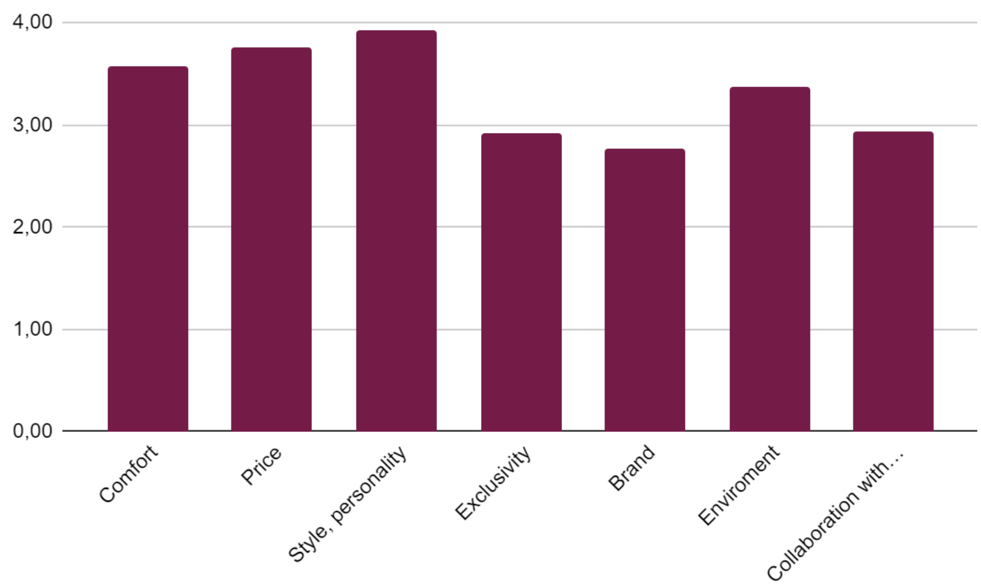


Source: Own elaboration

Second-hand consumers clearly agree that buying this type of products is a way to save money (80.2%). Similarly, when analysing whether they considered that second-hand fashion made luxury products more accessible, 83.3% of respondents thought it did, the remaining 16.7% did not. These figures reflect that second-hand fashion, in a certain way, helps to democratise fashion, as also indicated in Chapter 3.

Consumers are asked to assess how several factors may influence their purchases of second-hand clothing, to find out how important these aspects are to them (Figure 14). The three most relevant factors, valued on a Likert scale from 1 to 5, were clear: style/personality (3.93), price (3.75), and comfort (3.58). Also, although price may not be the most determining factor in their buying process, as seen before, consumers do take it into account (3.75). This points out that consumers want clothes with style, but not necessarily exclusive (2.91) and not a brand in particular (2.77), that at the same time are stylish and comfortable to wear. The collaboration with NGOs (2.94) or caring more about the environment (3.37) are factors that customers value in their purchasing decision. This is in line with the factors seen, where price or style were above environment but still a relevant factor. While it is true that for the purpose of this paper it is not a good premise that the environment is the fourth most relevant factor, it is good that it is valued more than the brand or the exclusivity of a garment. This may show more concern for the garment itself and its design than for factors surrounding it.

Figure 14. Second-hand apparel consumers' assessment of the important of different on the purchasing process

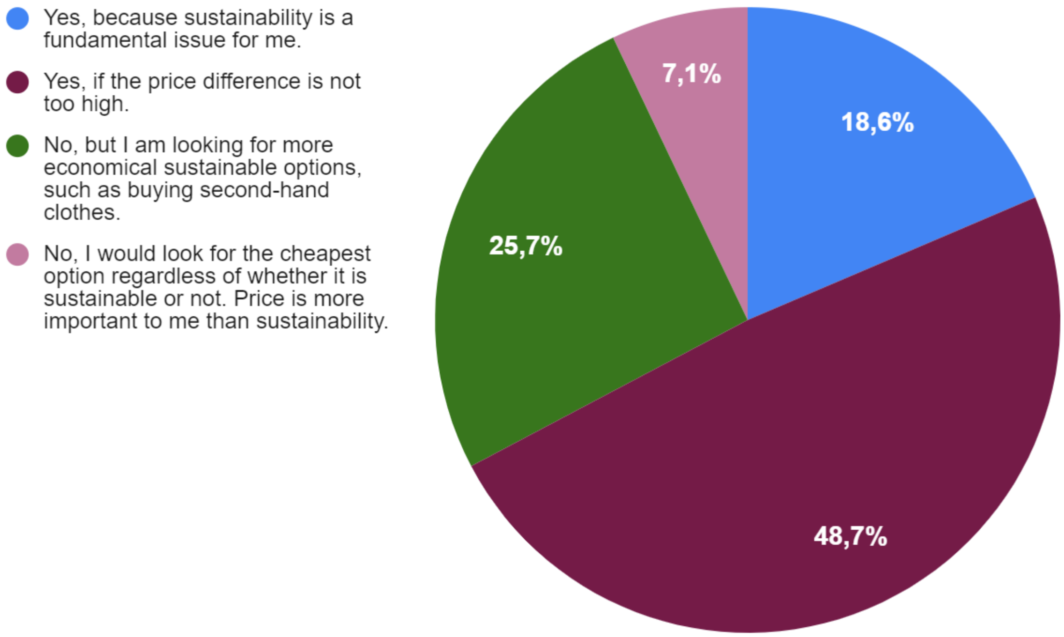


Source: Own elaboration

Figure 15 reflects consumers' willingness to pay a higher price for sustainable garments. Evidence reflects that only 7.1% radically rejected to pay more; they would look for the most economical option regardless of whether it was sustainable or not. Almost half of respondents (48.7%) indicated that they would pay more for a garment if the difference in terms of prices were not too great, and 18.7%

clearly agreed to pay more, as sustainability is a key issue for them. The remaining 25.7% rejected to pay more but affirmed that they would look for more sustainable options such as second-hand clothing. In sum, more than 90% of Spaniards care about their clothes being sustainable and, although not all would agree on paying more, they would choose the most sustainable option they can afford.

Figure 15. Willingness of consumer to pay a higher price for a sustainable garment



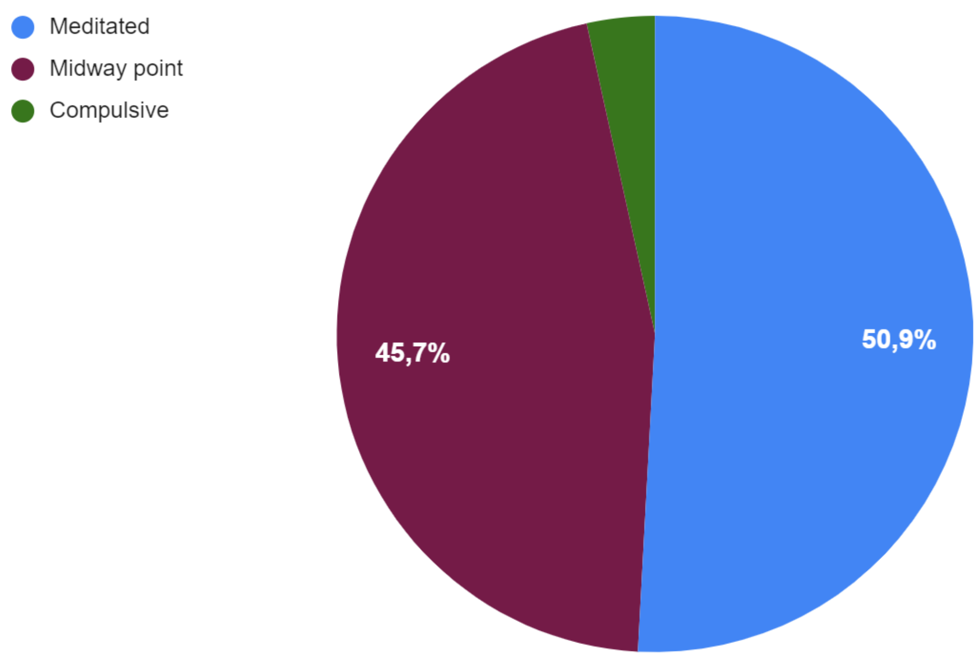
Source: Own elaboration

Continuing on the theme of responsibility, when customers were asked whether they consider that they have a responsibility towards the environment when they buy, 91.1% said yes, with the remaining 8.9% saying no. Going deeper on this, 33.6% of consumers considered that they had a responsibility but had not changed their habits because there was little they could do as an individual. This is a misconception because, as it will see later, family and friends are a factor that may influence second-hand purchases. So, the fact that someone changes his/her consumption habits has relevance not only for him/her, but also for his/her environment, and it can have a knock-on effect.

As mentioned above, consumers were asked whether they felt they had a responsibility towards the environment when making their purchases. In addition to the 33.6%, 57.8% responded that they did feel a responsibility and the remaining 8.6% that they did not. This demonstrates over 90% awareness of the impact of shopping on the environment, which is a good basis for consumers to adapt to more sustainable clothing.

As previously mentioned, the consumers were asked whether their decision to buy second-hand clothing was a thoughtful process (Figure 16). Half of respondents (50.9%) affirmed that it was a thoughtful process and (45.7%) that it was somewhere between compulsive and thoughtful. Only 3.4% considered that they buy compulsively. These results support was as previously related in the literature: fast fashion is related to compulsive processes, and second-hand to slower, stress-free processes.

Figure 16. Consumers' degree of compulsiveness when buying second-hand apparel



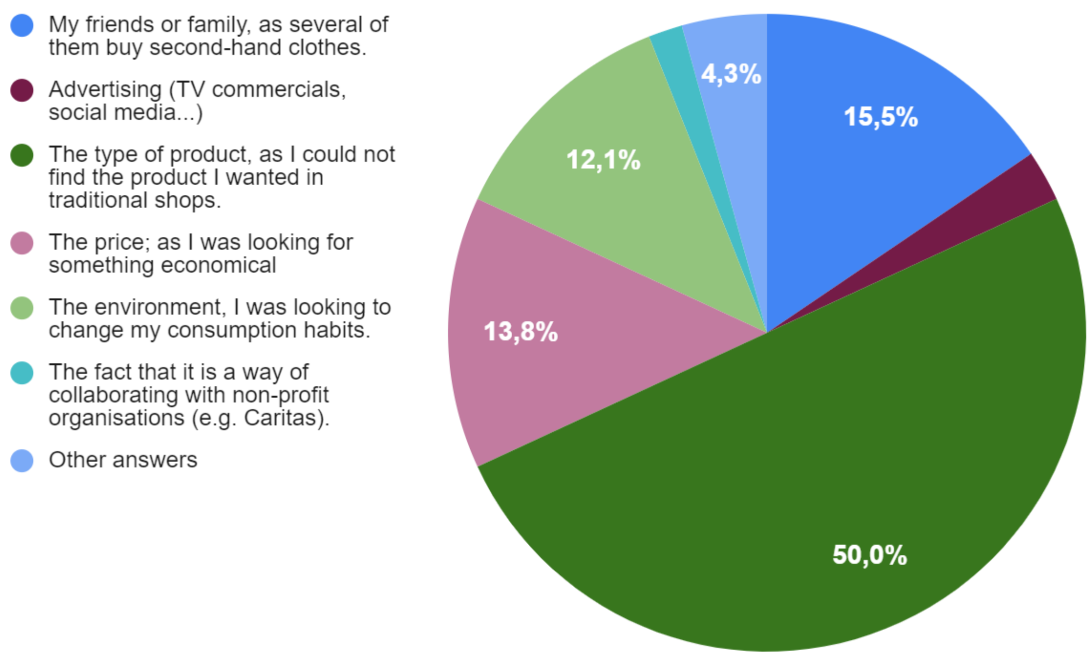
Source: Own elaboration

When customers are asked whether they felt good when buying second-hand clothing, on a Likert scale from 1 to 5, most respondents indicated that they neither good, nether bad (35.3%), whereas a close percentage agreed (30.2%) or strongly agree 4 (30.2%). This reinforces what was Haraldssonn and Peric (2017) found, i.e., second-hand clothes could have positive effects on the mental health of consumers, making them feel good.

Consumers were also asked on whether they would buy more second-hand clothing if the government promoted measures to support this sector. Clearly, most respondents (68.7%) would buy more, 24.3% feel doubtful, and the remaining 7% said no. This possibility would encourage second-hand purchases among second-hand fashion consumers and non-consumers, although to a greater extent among those who are already consumers.

Finally, the respondents were also asked what triggered their purchase the first time they bought a second-hand garment (Figure 17). With 52.3%, the majority voted that it was the type of product, as they were looking for clothes difficult to find in traditional shops. This is related to the most important purchase factor they voted for previously: style and personality. 16.2% indicated that it was friends or family who were already buying second-hand; 14.4% bought because of a cheaper price; 12.6% because they were looking for more sustainable options; 2.7% driven by advertisements; and 1.8% as a way to support non-profit organisations.

Figure 17. Main drivers in the first purchase of second-hand apparel

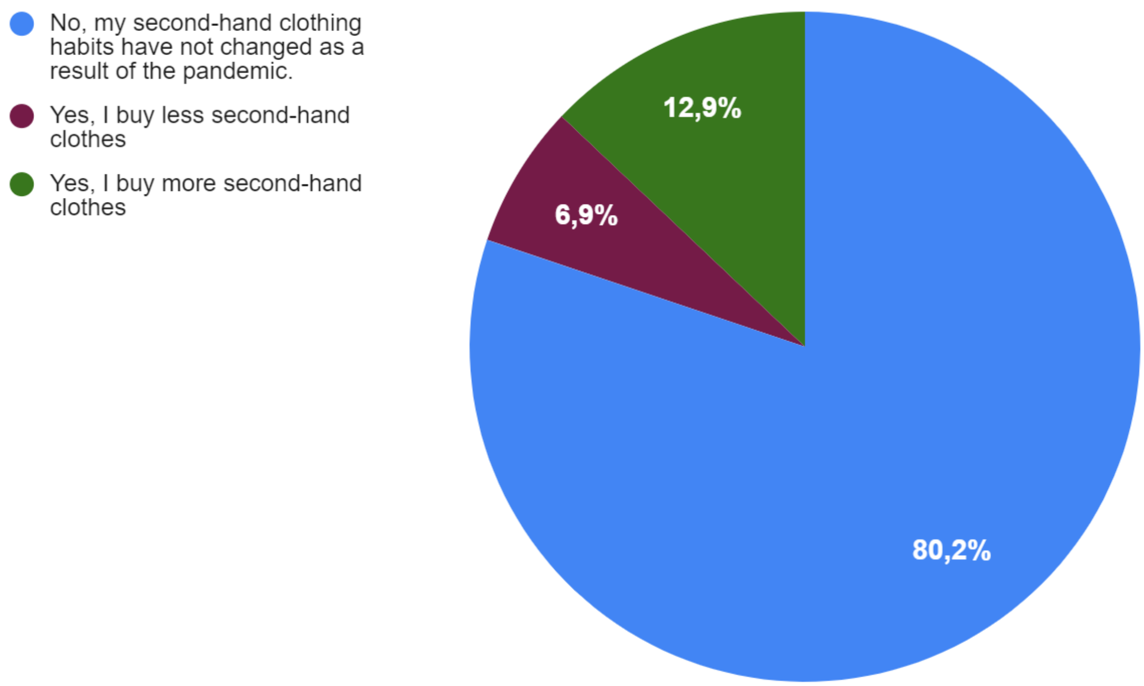


Source: Own elaboration

The remainder of this section is aimed at understanding whether the COVID-19 pandemic changed the consumption habits of consumers regarding the purchase of second-hand apparel. In this regard, when questioned whether the COVID-19 pandemic caused them to start buying second-hand clothes, 81.9% stated they were already buying these clothes before the pandemic, but the remaining 18.1% recognised that they started buying these products in the wake of the pandemic.

Overall, as Figure 18 reflects, 80.2% of second-hand consumers declared that the pandemic had not changed their consumption habits; 12.9% considered the pandemic led them to buy more second-hand clothes, whereas 6.9% considered it had the opposite effect. This evidence contradicts what was stated in Chapter 3, where it was seen that the pandemic had accentuated consumers' second-hand purchases.

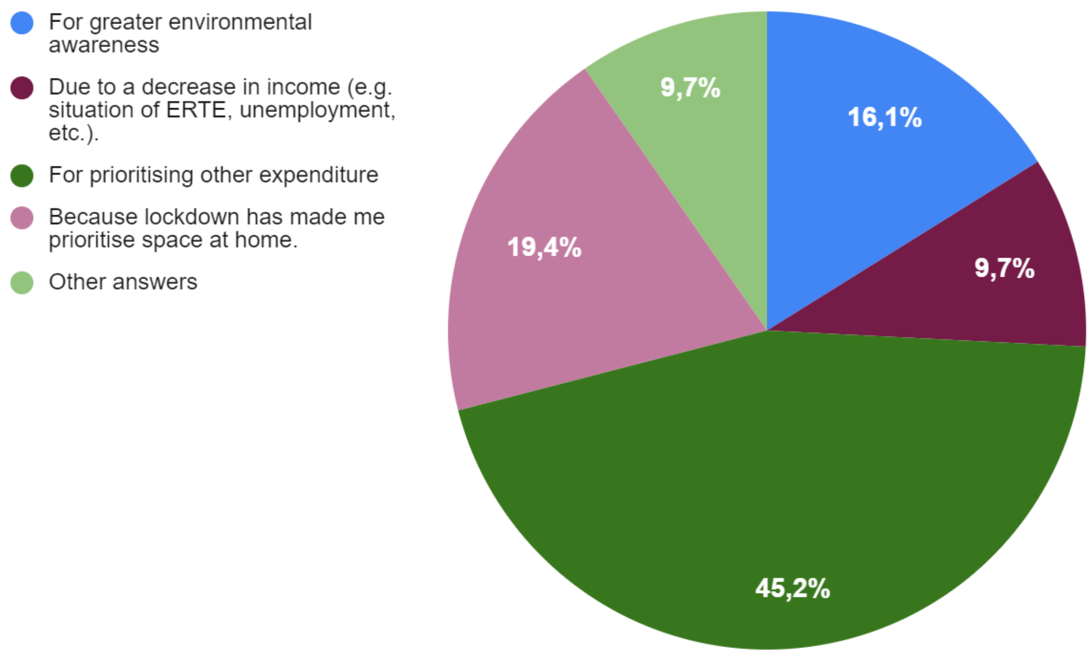
Figure 18. Change in shopping habits after the COVID-19



Source: Own elaboration

Consumers were also inquired whether they felt that the pandemic had caused them to reduce the amount of clothing (not only second-hand clothing) they buy. In this regard, 45.7% said no, while more than 50% recognised they had reduced the amount of clothing they consumed either partially (31%) or to a large extent (23.3%). Now, the reasons why those who reduced the amount of clothing they buy, did so are seen on deeper. As reflect in Figure 19, nearly half of them (45.1%), recognised they did so for prioritising other expenses; 16.1% said due to greater environmental awareness; 9.7% because of a decrease in their income; and just over 19.4% said it was for reasons related to having more space in their home, as the lockdown forced people to stay at home and as a results, some became aware of the need of having more space and looking for more comfortable homes. The remaining 9.7% were open responses, which include other reasons.

Figure 19. Main reasons why consumers bought less garments after the COVID-19



Source: Own elaboration

5.5. Conclusions

After analysing the data obtained from this questionnaire, a closer definition of the profile of second-hand fashion consumers can be made. Second-hand consumers equally use online platforms and physical shops, are not frequent buyers and have a rather meditated buying process in which they enjoy treasure hunting. They are consumers who, for the most part, are not driven by the fact that second-hand nowadays is a trend, who are looking for stylish and comfortable clothes at a good price, but prioritising sustainability in their purchases and feeling a sense of responsibility towards the environment. In addition, it was seen that maybe there is a positive psychological link to the second-hand shopping process, but it will be explained more later. Also, in the case of both second-hand fashion buyers and non-buyers, if governmental measures fostering the second-hand sector were taken, they would probably increase their second-hand purchases.

Most second-hand fashion consumers were already buying second-hand clothes before the pandemic, thus considering that their shopping habits have not changed, neither in terms of the purchase decision, nor in the quantity of products they buy. Among those who reduced the quantity of garments bought, the majority indicated economic reasons, and to a lesser extent space or environment-related reasons. This suggests that the pandemic itself has not generated a radical change in thinking or a massive awareness of the environment.

Among those who have never bought second-hand fashion, prejudices towards these garments does not seem to be a reason for not buying. Furthermore, when asked a reduction of price or reducing their environmental impact would make them buy second-hand, the response was mostly positive. These results indicate a possible purchase intention and environmental awareness.

6. Conclusions

In this project it is consider the main objectives established at the beginning were reached. It has been determined the situation of second-hand fashion in Spain. In this country there are no specific regulations nor a large presence of physical shops. Most of the shops are online. This limits the purchase of second-hand clothes because physical second-hand shops in Spain are small and located in large cities, so a larger number of physical second-hand shops could favour a higher consumption of second-hand clothes.

In addition, the position of the consumers with regard to second-hand fashion was determined. It was seen that more than half of the Spanish consumers (54%) already buys second-hand clothes. And of those who do not consume second-hand clothes, more than half (45.4%) would be willing to buy these clothes and, if an incentive is added like cheaper price, this percentage increases to a 56.6%. But among non-consumers, something already mentioned, the availability of products, came to the fore. In general, Spanish consumers have received positive responses to second-hand clothes and there is little stigma attached to them. It should also be noted that, although consumers are concerned about style, they are looking for it in sustainable garments.

Secondly, this project addresses how second-hand clothing gives a different solution in relation to the other current alternatives in the textile industry in terms of sustainability, being an option that provides a solution to two major problems: (a) what to do with all the waste generated by the textile industry; and (b) how to generate new products in a sustainable way. On whether this would be a viable route to the circular economy in Spain, the answer would also be positive according to this study. This is because consumers show an interest in sustainability and the environment. If their willingness to buy this type of clothing is added, second-hand clothing can be established as a possible future for sustainable clothing in Spain.

At the beginning of this project, number of secondary objectives were also set. Regarding the reasons why a consumer does not buy second-hand clothes, number of proposals for improvement were set. As to whether second-hand clothing is just a fashion statement, it was established that it is not, with 74.1% stating that they do not buy second-hand only because it is trendy. It has also been established that second-hand consumers are mostly aware of the positive environmental effects of second-hand clothing, and they care about the environment (91.1%). Finally, it was identified that the COVID-19 pandemic did not have a great impact for second-hand consumers, stating in an 80.2% the pandemic did not change their purchase habits.

Moreover, this project analyses the different business models regarding second-hand fashion that can be identified for the Spanish case. In so doing, this project tentatively proposes a new classification for online and offline second-hand fashion stores.

Ultimately, this makes it possible to consider second-hand garments as part of the future potential of the fashion industry. A future that uses these resources already present in this planet will be more sustainable and environmentally friendly, thus making fashion circular, respectful and durable.

Along the following lines, and based on the evidence obtained from the questionnaire, some recommendations will propose aimed at fostering the second-hand fashion industry in Spain.

Although treasure hunting is a factor that consumers value highly (65.5% in favour of this), it is true that this type of shopping is not always the most practical. When it comes to finding sizes or being able to search by colour, second-hand fashion is, to say the least, complicated and it is the highest rated factor (3.27 out of 5) in the reasons why non-consumers do not buy second-hand clothing. Therefore, one area of improvement in this industry would be textile sorting. It is believed that, in order to improve efficiency, garments should be sorted into a series of filters that allow shoppers to enter what they are looking for more easily. Although this can be done in apps for individuals, the results are not reliable. As it works by algorithms, the descriptions may not be real or may mislead the consumer. Also, non-consumers highlighted that second-hand clothing does not fit their style (2.41 out of 5) so better filters could help them find more style fitting items.

On the other hand, it could be positive to create price comparisons between original and second-hand. Second-hand buyers highlighted that second-hand garments help to save money, claiming this a 80.2%, while non-buyers indicated that the price difference is not big enough with a new product (2.7 out of 5). Creating price comparisons between the original price and the price at which it is sold or including the actual savings on the ticket may be some strategies to motivate non-consumers to buy.

Also, the introduction of other methods of acquiring second-hand clothing, such as renting, may be a positive step. In consumers' wardrobes there is an important percentage of unused garments, especially in those of second-hand consumers. The option of renting garments could help to avoid buying garments for few occasions or which have less use in the wardrobe. This would require a more in-depth study, as will be discussed in the improvements.

Likewise, more than 80% of both consumers and non-consumers have expressed that governmental measures fostering circular economy and second-hand clothing would boost their purchases. For this reason, the involvement of the Spanish government in the promotion of second-hand fashion in this country is essential. The European Commission is already promoting multiple measures that would be advisable to implement and reinforce in this country.

One prejudice that was detected on the part of non-consumers towards second-hand garments is value for money, with 33.3% considering the value to be lower due to wear and tear and, out of 5, the rated with a 2.09 that second-hand garments do not have enough quality. One way to reduce may be to give a guarantee on garments or better after-sales services such as the offer of repair services.

In addition, it is worth noting that consumers positively value outlets where they can buy other products (3.3 out of 5), so another viable business option would be generic second-hand outlets selling clothes, furniture, books, etc.

After explaining the different improvements or recommendations that can be drawn from the questionnaire that has been conducted, let us comment on some of the limitations this project had to face when it was carried out. The first limitation deals with the use of a non-probabilistic sampling. This meant that the sample was not objective, but an allocative one. Therefore, when analysing the results, it was observed that they are more representative of certain sectors such as young people and students. The second limitation, related with the previous one, is associated with the use of an online questionnaire when conducting the survey. The online questionnaire constituted the most useful and practical way to reach a significant number of responses, but it excludes people who do not have an Internet connection and an email account, who usually are old people. This type of questionnaire also limits the audience it can reach because it does not have adapted accessibility, so people with vision problems may not be able to take it.

In addition, some extensions will be highlighted that could be made to this work in future projects or some lines of research that may be considered relevant to explore. First, a study could be carried out on the favourite shopping places for second-hand consumers and their motives. By creating such a study and classifying it by age, specific niches could be established for each business model established above.

Also, to carry out a study on the treatment of second-hand clothes in Spain. To know their treatment processes and to be able to create a study similar to the one that came from Redress, looking at the real state of the garments after collecting and classifying them. This would make it possible to find out what is the current process of treatment of the garments and what is the real state of the garments and if it would be possible to reuse more and improve these sorting processes in Spain.

Analysis of the mental repercussions of buying fast fashion and second-hand clothes. As it was seen, second-hand clothes could have a relationship with the mental health and mood of the consumer.

This is based on the fact that 60.2% of the consumers said they have positive emotions after making these purchases. According to this study, the results are positive and beneficial for the consumer. But being such a delicate subject, it would be advisable to carry out more specific studies in order to correctly determine this relationship. This would allow us to see if it really has a positive impact and what are the reasons for it.

Finally, a striking factor was that second-hand consumers have more unworn garments than those who do not consume second-hand clothing. This is very interesting, and a study could be carried out to determine the reasons for this phenomenon as well as possible solutions. In this project a solution was proposed, but it could be improved with a more in-depth study.

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Appendix

La moda de segunda mano en España

Hola. Soy Sofía Pintor March, alumna de 4º curso del Grado en Gestión Industrial de la Moda en la Universidade da Coruña, y actualmente estoy realizando mi Trabajo Fin de Grado (TFG) sobre la ropa de segunda mano en España.

Uno de los objetivos principales de mi TFG es conocer más acerca del perfil del consumidor de ropa de segunda mano. Es por ello que le agradecería que, por favor, completase la siguiente encuesta, cuya duración estimada es de 10 minutos.

Le garantizamos que los datos obtenidos serán tratados de manera anónima, de acuerdo con el Reglamento General de Protección de Datos (UE) 2016/679 de 27 de abril de 2016 (GDPR) y se utilizarán únicamente de forma agregada y anonimizada con fines académicos y de investigación.

¡Muchas gracias por su colaboración!

*Obligatorio

1. ¿Ha comprado alguna vez en tiendas de ropa de segunda mano? *

Marca solo un óvalo.

- Sí *Salta a la pregunta 29*
- No *Salta a la pregunta 2*

Consumidores que no han comprado en tiendas de segunda mano

En este bloque buscamos conocer las causas por las que no ha comprado ropa de segunda mano y si, bajo ciertos supuesto, se plantearía comprarla

2. ¿Cuál es el principal motivo por el que no se ha decidido a comprar ropa de segunda mano? Valore las siguientes afirmaciones en una escala 1-5, siendo 1 'muy en desacuerdo' y 5 'totalmente de acuerdo' *

Selecciona todos los que correspondan.

	1	2	3	4	5
La ropa de segunda mano no es higiénica, al haber sido usada previamente.	☐	☐	☐	☐	☐
La ropa de segunda mano no tiene calidad suficiente o está en mal estado.	☐	☐	☐	☐	☐
La diferencia entre el precio de la ropa de segunda mano y el de la ropa nueva no compensa comprar ropa de segunda mano.	☐	☐	☐	☐	☐
La ropa de segunda mano no encaja con mi estilo y forma de vestir.	☐	☐	☐	☐	☐
La ropa de segunda mano no sigue las últimas tendencias en moda.	☐	☐	☐	☐	☐
La ropa de segunda mano está relacionada con la pobreza o carencia de recursos.	☐	☐	☐	☐	☐
Es más difícil comprar ropa de segunda mano (no hay tanta disponibilidad de tallas, por ejemplo).	☐	☐	☐	☐	☐

3. Cada persona en España desecha o tira, en media, entre 12 y 14 kilos de prendas de ropa al año, muchas de ellas sin usar. ¿Cuántas prendas de su armario se ha puesto entre 0 y 2 veces durante el último año? *

Marca solo un óvalo.

- Entre 0 y 5 prendas
- Entre 6 y 10 prendas
- Entre 11 y 20 prendas
- Entre 21 y 30 prendas
- Más de 30 prendas

4. ¿Considera que la reutilización de esas prendas (esto es, el darles una segunda vida para evitar que se tiren a la basura) sería un buen modo de reducir el impacto medioambiental sobre el planeta? *

Marca solo un óvalo.

- Sí, consideraré la compra de ropa de segunda mano porque el medio ambiente es importante para mí.
- Sí, pero seguiré sin considerar la compra de ropa segunda mano, por las razones antes indicadas.
- Es posible, pero el medioambiente no es prioritario para mí al comprar ropa.
- No, creo que hay otros métodos más eficaces para reducir el impacto medioambiental.
- Otro: ______________________

5. Las prendas de segunda mano son, de media, más baratas que las prendas de primera mano o nuevas. ¿Aumentaría esto las posibilidades de que compre ropa de segunda mano?

Marca solo un óvalo.

- Sí, el precio es importante para mí al comprar ropa
- No, considero que la relación calidad/precio que ofrecen es inferior a la de prendas nuevas
- No, considero que la diferencia de precio con las prendas nuevas no es suficiente, pero si fuese mayor, sí valoraría comprar ropa de segunda mano.
- No, el precio no es prioritario para mí al comprar ropa

6. ¿Considera que las prendas de ropa de segunda mano tienen menor valor (esto es, le proporcionan una menor satisfacción) que las prendas de ropa nueva?

Marca solo un óvalo.

- Sí, porque ya tienen un uso previo
- No. Considero que, a pesar del uso, son productos que pueden usarse aún durante más tiempo.
- No, considero que tienen mayor valor. Los productos de segunda mano son únicos y difíciles de conseguir (ej. prendas vintage)
- Otro: ____________________

7. ¿Consideraría comprar ropa de segunda mano si desde el gobierno se promoviesen medidas de apoyo a este método de compra, a través de, por ejemplo, reducciones en el IVA, bonos para realizar compras, etc.?

Marca solo un óvalo.

- Sí
- No
- Tal vez

Salta a la pregunta 29

Consumidores que sí han comprado en tiendas de segunda mano

En este bloque buscamos conocer un poco más sobre el perfil y motivaciones de los compradores de ropa de segunda mano.

8. Cada persona en España desecha o tira, en media, entre 12 y 14 kilos de prendas de ropa al año, muchas de ellas sin usar. ¿Cuántas prendas de su armario se ha puesto entre 0 y 2 veces durante el último año? *

Marca solo un óvalo.

- Entre 0 y 5 prendas
- Entre 6 y 10 prendas
- Entre 11 y 20 prendas
- Entre 21 y 30 prendas
- Más de 30 prendas

9. Pensando en las prendas que tiene en su armario, ¿qué porcentaje de éstas son prendas de ropa de segunda mano? *

Marca solo un óvalo.

- Menos de un 20%
- Entre un 20-50%
- Más de un 50%

10. ¿Con qué frecuencia compra en tiendas de ropa de segunda mano? *

Marca solo un óvalo.

- Semanalmente
- Mensualmente
- Varias veces al año
- Otra frecuencia menor

11. ¿Dónde realiza la mayor parte de sus compras de ropa de segunda mano? *

Marca solo un óvalo.

- Tiendas físicas de segunda mano
- Mercadillos
- Plataformas online de particulares (Wallapop, Vinted, MilAnuncios, Facebook marketplace...)
- Plataformas online de profesionales (Vestiaire Collective, Micolet, Percentil...)
- Otro: ______________________

12. ¿El hecho de que comprar ropa de segunda mano sea una de las principales tendencias en la actualidad hace que la quiera comprar? Nos referimos a que la compra de ropa de segunda mano se ha popularizado, y cada vez es frecuente ver anuncios publicitarios en televisión o redes sociales sobre empresas o aplicaciones de ropa de segunda mano. *

Marca solo un óvalo.

- Sí. Sin duda el factor tendencia determina mi compra
- Sí, es probable que mi compra se vea influida por el efecto tendencia
- Sí, pero a pesar de ello, comprar ropa de segunda mano será algo que mantendré en el tiempo
- No, compro ropa de segunda mano por otros motivos

13. ¿Es el precio el factor más determinante para usted en la compra de ropa de segunda mano? *

Marca solo un óvalo.

- Sí, para mí el precio es sin duda el factor más importante
- Sí, pero también lo es la calidad. Priorizo la relación calidad-precio
- No, el precio es una variable más del proceso de compra
- No, el precio no es una variable en absoluto importante. Estoy dispuesto a pagar un precio elevado por una prenda exclusiva.

14. ¿Cuál es la importancia que le otorga a las siguientes características o criterios cuando compra ropa de segunda mano? Valore las siguientes características en una escala 1-5, siendo 1 'muy poco importante' y 5 'muy importante' *

Marca solo un óvalo por fila.

	1	2	3	4	5
Comodidad					
Precio					
Estilo, personalidad					
Exclusividad					
Marca					
Contribución al medio ambiente					
Colaboración con entidades sin fines de lucro					

15. ¿Considera que la ropa de segunda mano es un modo de ahorrar dinero? *

Marca solo un óvalo.

- Sí
- No

16. ¿Estaría dispuesto a pagar un precio superior por una prenda de ropa si ésta es sostenible? (Entendiendo por sostenible aquella prenda que reduce su impacto en el planeta en cualquier punto de su vida útil) *

Marca solo un óvalo.

- Sí, porque la sostenibilidad es una cuestión fundamental para mí
- Sí, si la diferencia de precio no es muy elevada
- No, pero busco opciones sostenibles más económicas, como la compra de ropa de segunda mano
- No, buscaría la opción más económica independientemente de si es sostenible o no. El precio es más importante para mí que la sostenibilidad.
- Otro: ______________________

17. ¿Su decisión de compra de ropa de segunda mano es un proceso compulsivo o meditado?

Marca solo un óvalo.

- Meditado, dedico un tiempo a valorar cada compra y si realmente es una prenda que será útil
- Punto intermedio, intento buscar prendas que vaya a usar habitualmente pero también compro algunos productos sin pensarlo demasiado
- Compulsivo, no pienso mis compras y eso me lleva a tener bastantes prendas que casi ni uso

18. La primera vez que realizó una compra de ropa de segunda mano, ¿qué le motivó a realizar dicha compra? *

Marca solo un óvalo.

- Mis amistades o familia, ya que varios compran ropa de segunda mano
- El precio; ya que buscaba algo económico
- El tipo de producto, al no encontrar el producto que deseaba en tiendas tradicionales
- El medioambiente, estaba buscando cambiar mis hábitos de consumo
- La publicidad (anuncios en TV, redes sociales...)
- El hecho de que es una forma de colaborar con organizaciones no lucrativas (ej. Cáritas)
- Otro: ______________________

19. ¿Cree que la ropa de segunda mano facilita que los consumidores puedan adquirir artículos de marcas de lujo? *

Marca solo un óvalo.

- Sí, creo que favorecen que sean más asequibles
- No, creo que no son accesibles para todo el mundo, ni siquiera en el mercado de segunda mano
- Otro: ______________________

20. ¿Se siente bien cuando realiza una compra de prendas de segunda mano? Valore las siguientes afirmaciones en una escala 1-5, siendo 1 'muy en desacuerdo' y 5 'totalmente de acuerdo' *

Marca solo un óvalo.

1	2	3	4	5
○	○	○	○	○

21. ¿Valora el "treasure hunting" como un factor relevante para comprar prendas de segunda mano? (treasure hunting = proceso de búsqueda en el que se pueden encontrar prendas únicas o grandes ofertas) Valore las siguientes afirmaciones en una escala 1-5, siendo 1 'muy en desacuerdo' y 5 'totalmente de acuerdo' *

Marca solo un óvalo.

1	2	3	4	5
◯	◯	◯	◯	◯

22. ¿Considera que tiene una responsabilidad con el medioambiente cuando realiza sus compras? *

Marca solo un óvalo.

◯ Sí

◯ Sí, pero no he cambiado mis hábitos de compra porque como consumidor individual poco puedo hacer

◯ No

23. ¿Considera importante para comprar ropa de segunda mano que pueda adquirir también otros productos distintos en la misma compra, como muebles, libros, etc.? Valore las siguientes afirmaciones en una escala 1-5, siendo 1 'muy en desacuerdo' y 5 'totalmente de acuerdo' *

Marca solo un óvalo.

1	2	3	4	5
◯	◯	◯	◯	◯

24. ¿Consideraría comprar ropa de segunda mano si desde el gobierno se promoviesen medidas de apoyo a este método de compra, a través de, por ejemplo, reducciones en el IVA, bonos para realizar compras, etc.?

Marca solo un óvalo.

- Sí
- No
- Tal vez

Influencia del COVID-19 en el consumo de prendas de segunda mano

En este bloque buscamos conocer si la pandemia de COVID-19 ha tenido algún efecto en su decisión de comprar ropa de segunda mano.

25. ¿Cuánto tiempo hace que compra en tiendas de ropa de segunda mano?

Marca solo un óvalo.

- Desde antes de la pandemia
- Empecé a comprar ropa en estas tiendas después de la pandemia

26. ¿Considera que la pandemia del COVID-19 ha cambiado sus hábitos de consumo de ropa de segunda mano?

Marca solo un óvalo.

- Sí, compro más ropa de segunda mano
- Sí, compro menos ropa de segunda mano
- No, mis hábitos de consumo de ropa de segunda mano no han variado como consecuencia de la pandemia

27. ¿Considera que la pandemia del COVID-19 ha provocado que reduzca la cantidad de prendas que compra?

Marca solo un óvalo.

- Sí, en gran medida
- Sí, pero solo parcialmente
- No, no he cambiado la cantidad de prendas que consumo

28. Si la respuesta anterior ha sido afirmativa, ¿por qué ha cambiado sus hábitos de consumo tras la pandemia del COVID-19?

Marca solo un óvalo.

- Por una mayor conciencia medioambiental
- Por priorizar otros gastos
- Por una disminución de los ingresos (ej. situación de ERTE, desempleo…)
- Porque el confinamiento me ha hecho priorizar el espacio en casa
- Otro: ____________

Perfil personal

29. Género *

Marca solo un óvalo.

- Mujer
- Hombre
- Prefiero no decirlo
- Otro: ____________

30. Edad *

____

31. ¿Ha heredado ropa de algún miembro de su familia (ej. hermano/a, primo/a) o conocido/a durante su infancia? *

Marca solo un óvalo.

- Sí
- No

32. Nivel máximo de estudios que ha alcanzado *

Marca solo un óvalo.

- Sin estudios
- Educación primaria/Estudios primarios
- Educación secundaria
- Bachillerato
- Formación Profesional (ya sea ciclo medio o superior) o equivalente
- Grado/Diplomatura/Licenciatura/Ingeniería
- Máster/Posgrado/Curso de Especialización
- Doctorado

33. Situación profesional

Marca solo un óvalo.

- Estudiante
- Trabajador/a por cuenta propia
- Trabajador/a por cuenta ajena (a tiempo parcial)
- Trabajador/a por cuenta ajena (a tiempo completo)
- Desempleado/a
- Incapacitado/a
- Jubilado/a
- Amo/a de casa

34. Estado civil *

Marca solo un óvalo.

- Soltero/a
- Casado/a
- Divorciado/a
- Viudo/a
- Prefiero no responder

35. ¿Cuáles son, en media, sus ingresos brutos anuales? Seleccione la franja que corresponde, considerando los ingresos de todas las personas que conforman su hogar. (Le recordamos que sus respuestas son anónimas) *

Marca solo un óvalo.

- De 1 a 9.999 euros
- De 10.000 a 24.999 euros
- De 25.000 a 49.999 euros
- De 50.000 a 74.999 euros
- De 75.000 a 99.999 euros
- Más de 100.000 euros
- Prefiero no responder

36. Su lugar de residencia tiene... *

Marca solo un óvalo.

- Menos de 5.000 habitantes
- Entre 5.000 y 10.000 habitantes
- Entre 10.000 y 50.000 habitantes
- Más de 50.000 habitantes

37. Lugar de residencia *

Marca solo un óvalo.

- Galicia
- Resto de España
- Resto del mundo

Fin del cuestionario

Muchas gracias por su tiempo y por haber colaborado en la realización de este TFG. No te olvides de pulsar en "Enviar".

Si tiene cualquier duda o sugerencia, puede ponerse en contacto conmigo ([redacted]) o con mis tutoras de TFG: Lucía Rey ([redacted]) o Vanessa Mato ([redacted]).