

Overview of survey

Behavioural insight is a foundation of the EPA's Circular Economy Programme, providing evidence to inform policy, to inform behavioural change interventions and to inform awareness campaigns. The EPA contracted Behaviour & Attitudes (B&A) to carry out this qualitative study to understand the needs, influencers and barriers of women (up to 35 years) to buying Second Hand clothes/preloved clothes in preference to new clothing.

Six qualitative discussion groups were conducted online in October 2022 across Dublin, Cork and Galway among women aged 18 – 35 years – 45 participants overall. To get a gradient of attitudes towards Second Hand clothing, a mix of those more engaged with Second Hand clothing ('advocates') and those less engaged ('consideration' and 'inattentive') were included. This research incorporates and builds on insights from the [nationally representative baseline survey](#) on Irish citizens' attitudes, awareness and behaviours relating to textiles conducted in 2021.

The study topic areas are presented in a series of four sections:

Section 1 Approach, needs and attitudes to clothes shopping

Section 2 Understanding the Second Hand clothing context

Section 3 Shopping for Second Hand clothing

Section 4 Increasing engagement with Second Hand clothing



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Section 1: Approach, needs and attitudes to clothes shopping



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Approach, needs and attitudes to clothes shopping: *Highlights*

Retail is still in their shopping repertoire but online shopping dominates. This movement to online clothes shopping accelerated during the pandemic.

This shift to online has changed consumers expectations from shopping. Shoppers want a large variety of choice, at speed, with most unwilling to compromise.

Retail often underwhelms. Those based outside of Dublin tend to be more critical of the retail experiences in their localities.

Opportunities to buy new clothes are everywhere. There is an initial 'default' to buy new clothes instead of considering buying Second Hand.

Customers can easily self rationalise the 'need' to buy new clothes over Second Hand. Many would like to be more conscientious. However, they often do not feel like they have the control or resources to do so.



Retail is still in their shopping repertoire but online shopping dominates

Insights

- **Women under 35 years of age are the highest frequency and volume purchasers of online clothes shopping activity:**
 - Flexible - generally add to their basket over a day or two and not in a single sitting.
 - More convenient - fit shopping around other parts of their lives.
 - Greater choice - of different sizes and styles of clothing.
 - Ability to filter - improves the ease of search.

- **Movement to online clothes shopping was accelerated during the pandemic:**
 - This movement is aided by a perceived weaker retail offer in city centres especially outside of Dublin.

- **The anticipated reward for a clothing package arriving is as enjoyable as the reward of receiving it itself:**
 - A “pick me up” during the week.

- **Social media often prompts the idea to search and buy clothes:**
 - Social media provides ideas on what to buy and often through influencers on Instagram, TikTok.
 - Discount codes sent direct to email also appear to be highly effective in prompting the idea to buy clothing.
 - Getting a sense of value and reinforced by scarcity ('sale ends in 12 hours').

Study

Six discussion groups of women aged 18-34 years were asked **how they like to shop for clothes - in-store or online.**

What the women say...

Preference for online

“I would buy 90% of clothes online. I love the convenience, I love the way you can filter exactly what you want, you have more options. Not everything is available in store”.

Dublin 25-35 years

Role of social media

“I am very swayed by social media. If I saw nice stuff on Instagram, that would sway me as well a lot of the time”.

Cork 25-35 years



Shift to online has changed their expectations from shopping

Insights

- Online shopping has trained women among the 18-34 years age group to **expect choice, convenience and ease**.
- These shoppers want a large variety of choice, at speed, with **most unwilling to compromise**.

Study

Six discussion groups of women aged 18-34 years shared their views and expectations from **shopping online**.

What the women say...

Expect unlimited options

"It is endless. If you are looking at Boohoo or Pretty Little Thing, it is easy to browse new stock in. ASOS could have hundreds of stuff new in today like."

Cork 25-35 years

Impatient with search

"I kind of find it difficult to shop in person now since like lockdown and stuff. Just because you can look up whatever you're looking for and get it straightaway instead of looking through a shop and everything."

Dublin 18-24 years

Next day delivery, ease of returns etc.

"Returning stuff is a lot easier than it used to be, I just go to my local Mace and they take it off me now."

Galway 18-24 years



In-store shopping often underwhelms but has an important social role

Insights

- **Women based outside of Dublin tend to be more critical of the retail experiences in their localities:**
 - Less choice of shops.
 - Many brands moving out of their localities.
- **Relative to shopping online, many are also quick to criticise the retail experience:**
 - Unorganised and messy shop environments .
 - The effort involved in searching for and trying on items in-store.
 - Not having the sizes of clothing they need.
 - Less choice of clothing items in-store.
 - Long queues at checkouts.
- **For this age group, buying online is the first port of call:**
 - Frequency of trips to retail stores appearing to be sporadic.
- **In-store shopping has an important social role and is needed for some clothing categories:**
 - Retail is often paired with socialising and indeed can be particularly associated with certain retailers.
 - Often required for some clothing categories such as trying on jeans, coats etc.

Study

Six discussion groups of women aged 18-34 years shared their experiences with **in-store shopping**.

What the women say...

Not satisfactory shop environments

"Going in there [global retail fashion brand] is a mess. It's a headache. The one in (local store)... it's chaos"
Cork 25-35 years



Typically exhibit an initial 'default' to buying new clothes

Insights

- Women in the 18-34 age group expect choice, convenience and ease and **typically exhibit an initial 'default' to buy new clothes instead of considering buying Second Hand:**
 - This perspective is also **driven by a string emotional cues, i.e. buying new as a way of signalling self-care, love to others, status and even generational progress.**
 - This default to buy new means that for many, the idea of buying clothing Second Hand is not even on their radar.

- **Buying new clothes over Second Hand clothes is reinforced by the availability in the market:**
 - The number of fast fashion purchasing opportunities far outstrips that of Second Hand purchasing opportunities.
 - Many assume that charity or vintage retail won't have what they are looking for.

- **Many say it is just easier and more convenient to buy new clothes because:**
 - Consistency of product.
 - Easier search process to find clothes (certainty of product quality when buying new).
 - Better range of clothing items in terms of sizes, colours, etc.
 - Strong online shopping propositions, e.g. next day delivery, free returns, etc.

Study

Six discussion groups of women aged 18-34 years discussed their considerations around **preferences for buying new rather than second hand.**

What the women say about buying Second Hand...

Social signalling of buying Second Hand

"I am not rich or anything, but I have never felt like I had to buy Second Hand clothes."

Cork 25-35 years

Limited availability in Second Hand shops

"If you're going new, you go with a kind of an occasion or a need in mind. But you feel that won't work if you're going Second Hand."

Galway 18-24 years



Can easily self-rationalise the 'need' to buy new clothes over Second Hand

Insights

Many of the women are engaging in shopping behaviours that they feel conflicts with their aspirational values (e.g. being sustainable, saving money). However, self-rationalisation of the 'need' to buy new is easy for many.

- **'It's not my fault'**

Often they pass the blame on to industry and the lack of choice in greener clothes option *'Sustainable clothing is too expensive'*.

- **'Whatabouterisms'**

Pointing out contradictions and hypocrites, e.g. 'Everyone is doing it' to give licence for their own behaviours of buying high volumes of new clothes.

- **'I deserve it'**

Convincing themselves that they are entitled to some unsustainable behaviours, e.g. 'Buying clothes is my reward each month'.

- **'I'm already doing my bit'**

Making one change in one part of their lives allows them to rationalise unsustainable behaviour elsewhere, e.g. 'But I'm really good at recycling'

Study

Six discussion groups of women aged 18-34 years were asked to elaborate on their **preference for buying new rather than second hand.**

What the women say...

Buying new as a reward

"I think it just doesn't feel the same. If I am having a bad day, I think I will buy a new jumper and I will feel good. Whereas if I was to buy a jumper in a Second Hand shop, I would think I have just done my good deed."

Cork 25-35 years



Section 2: Understanding the Second Hand clothing context



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Understanding the Second Hand clothing context: *Highlights*

The majority of customers are not selling Second Hand clothes. To get more higher quality clothing items in circulation, and to encourage higher engagement with the circular economy, it is important we shift consumer attitudes to recognise the value of their Second Hand items.

That being said, momentum is building in Second Hand clothing. With those 'in the know' noting more opportunities to buy Second Hand clothing.

However, there are regional differences - with this being a more Dublin centric perspective. And age differences – with there appearing to be greater knowledge of online sources (Depop) amongst the youngest age cohort 18-24.

Advocates of Second Hand clothing appear more likely to feel that uniqueness, affordability and sustainability are benefits, whereas those who don't buy Second Hand clothing tend to consider negative associations first (e.g. musty smell, not wanted, dirty, broken items).

Within friendship groups (particularly younger), the need for belonging is a significant motivator to purchase Second Hand clothing. Others enjoy the process of 'treasure hunting' with others liking just how much more affordable it can be.



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The majority are not selling their Second Hand clothes

Insights

- **Many do not value what they don't want themselves:**
 - Most don't put an intrinsic value on items of clothes they deem to be not worthy of keeping.
 - For many there is an underlying sense of guilt associated with selling their clothes. They think 'why would someone want something that I don't want?'

- **Selling clothes feels like will take a lot of time and effort (particularly online):**
 - For many, donating/giving away clothes in bulk feels the most efficient way of removing the 'problem' of an overcrowded wardrobe.
 - Many (especially 25-35 year olds) feel that individually selling clothing items on platforms such as Depop is highly inconvenient.

- **There is also the 'good feel factor' of donating their clothes to charity:**
 - Donating clothes to the charity shop/clothing bank is felt to be a 'good deed'.
 - Giving clothes away rather than trying to sell them is felt to be the 'right' way to dispose of clothing that they do not want.

Study

Six discussion groups of women aged 18-34 years were asked to elaborate on how they **manage and discard their unwanted clothes.**

What the women say...

Not seeing the value of their own clothes

"I would think that no one would want it. I feel like selling it would be kind of cheeky, I feel like its getting someone else to pay for my rubbish."

Dublin 25-35 years

Effort of selling online

"It's really time consuming to take pictures, keep an eye of it."

Dublin 18-24 years

Feeling good with donating

"I feel like I am doing something good by giving them to charity."

Galway 25-35 years



Momentum is building in Second Hand clothing

Insights

- Those 'in the know' who buy Second Hand clothes are more knowledgeable about opportunities to buy Second Hand clothing:
 - There are regional differences - there appears to be greater knowledge of Second Hand sources among women from Dublin.
 - There are age differences – there appears to be greater knowledge of Second Hand online sources (e.g. Depop) amongst the youngest age cohort 18-24 years.

Study

Six discussion groups of women aged 18-34 years were asked to elaborate on **how they manage and discard their unwanted clothes.**

What the women say ...

Limited awareness about Second Hand clothes

"When you think about it, it does make sense. Like where do all of our clothes go? It does make sense to start passing them along. I am coming around to the idea that we shouldn't just wear a top and throw it in the bin."

Cork 25-35 years

Greater knowledge of Second Hand sources

"The fact that you know, Depop has obviously grown so quickly. It's very easy to browse for stuff online and purchase."

"And then of course, like the likes of Nine Crows in Temple Bar and other charity shops and vintage shops have started opening up. Totally vintage as well."

"I get a lot of ads on my Instagram for those kinds of places as well. So, it's becoming very easy to buy second hand."

Dublin 18-24 years



'Transatlantic drift of Thrift' is disrupting some of the stigma & normalising Second Hand

Contextual Commentary

- The increasing volume of joyful commentary around 'thrifting' in the United States has **contemporised the Second Hand space**.
- This is about **smart shopping**, about **volume** and about **winning**.
- To engage in treasure hunting the promise of the reward must be **substantial but never guaranteed**.
- The Thrift movement, viewed online, allows the viewer to witness the **search and reward process** and **aspire to the same rewards**.
- This **disrupts the narrative** of the new clothing landscape **where nothing is novel and nothing is complex**.



There are different starting points for advocates and non-advocates of Second Hand clothing

Advocates of Second Hand clothing appear more likely to feel that **uniqueness**, **affordability** and **sustainability** are benefits, whereas those who don't buy Second Hand clothing tend to consider negative associations first (e.g. **musty smell**, **not wanted**, **dirty**, **broken items**).

- Advocates
- Non-Advocates
- Both



I do feel like doing my bit for the environment, you know, it is more sustainable. And Second Hand clothing is probably going to be the way that we'll have to go in the future

Dublin 18-24 years

I'm still a bit wary about wearing it. So I think if I was to wear it, I probably wash it like, twice first. And I think that's just because I haven't bought second hand before.

Cork 18-24 years

For those who don't currently purchase Second Hand clothes, **there is a perception challenge to overcome, as their initial associations start from a negative point.**



Younger age group's need for 'belonging' can drive initial engagement with Second Hand clothing

Insights

- **There is often a shared commitment (consciously or subconsciously) amongst friends to engage with Second Hand clothing:**
 - A collaborative effort to go against fast fashion,
 - Following popular trends - 'hopping on the bandwagon',
 - To find more unique styles; this can be a competitive element amongst friends.
- **Adhering to these set norms within friendship groups reinforces key belonging clothing needs:**
 - Consistency with peers,
 - Admiration,
 - Receiving complements.
- For many who are currently purchasing Second Hand clothing, **interest within friendship groups appears to be a key instigator** in developing initial engagement with Second Hand clothing as well as sustaining it over time.
- **Personal values are also playing an important role too.** For many, purchasing Second Hand clothing can be a self-directed endeavour driven by:
 - Personal attitudes towards sustainability,
 - Consumerism,
 - Spending money locally.

Study

Six discussion groups of women aged 18-34 years shared **their motivations for buying second hand clothes.**

What the women say...

Following popular trends

"I think only recently, it kind of became trendy to wear vintage looking clothes. Depop became a thing. And then it was cool to buy Second Hand. And then since then, I think I've hopped on the bandwagon of that".

Dublin 18-24 years

Admiration from peers

"My experience has been getting compliments from friends and them asking where I got it from".

Galway 25-35 years

Personal attitudes

"I felt it was more sustainable and better for the environment to buy a Second Hand piece of clothing. It was also being sold at a reduced price".

Galway 25-35 years



'Treasure hunting' has appeal for many already engaging with Second Hand clothing

Insights

- **Second Hand clothes shopping is an almost 'hobby like' interest in which there is:**
 - Enjoyment in the search process,
 - The thrill of the find.
- **The potential of finding something special, unique, original or different drives engagement:**
 - With many 'advocates' willing to put in the time and effort to do this.
- **A heightened sense of reward when they find something special, unique.**
 - The potential of finding something unique is a strong draw, with many showing a desire to avoid common trends from the high street retailers - "I don't want to look the same as everyone else!".
- **Second Hand clothing becomes a vehicle that allows them to express their individuality.**

Study

Six discussion groups of women aged 18-34 years were asked about their **experiences with and motivations around buying Second Hand clothing.**

What the women say...

Enjoyment in the search process

"When you go in, there is the potential of not buying anything. When you do find something its lovely because you are going in thinking you mightn't find anything".
Galway 25-35 years

Heightened sense of reward

"I love when I find something really cool. That's like, extremely cheap. There's just a way more like, satisfying and really just fulfilling feeling from it rather than buying something that's like always in stock, you know, and it's something original. So I think that's like there's way more of a thrill".
Dublin 18-24 years



Affordability is also undoubtedly an important motivator for buying Second Hand

Insights

- **For some, getting clothing at a discounted price is a strong motivator.**
 - In fact, for most this is an expectation of Second Hand clothing.
 - Most are reluctant to spend the same amount of money on Second Hand clothes as they do for brand new items.
 - With only some advocates willing to spend as much (or more) for Second Hand clothes they deem to be 'unique'.
- **Some are buying Second Hand clothes for their kids as they grow so quickly.**
 - With this appearing to act as an entry point for parents to browse Second Hand items for themselves (especially C1C2 social group).
- **However, for many 'Second Hand is felt to be second best'.**
 - For many, buying Second Hand clothing can conflict with their 'self-concept' (identity/how they see themselves).
 - There is a stigma that signals an individual who is struggling (financially), or even who lacks self-care.

Study

Six discussion groups of women aged 18-34 years were asked their **reasons for buying Second Hand clothing.**

What the women say...

Second Hand clothing for kids

"I would buy my kids clothes in there a little bit because especially with kids' clothes, they grow out of them so fast so a lot of them don't really last or feel as worn, they would still be and have a lot of life left in them".

Galway 25-35 years

Financial stigma

"I was mortified going in there to be honest. I was embarrassed and I don't know why. Maybe because if someone saw me. I thought they were going to give me a big St. Vincent de Paul bag, but they gave me a Dunnes bag thank god".

Cork 25-35 years



For non-buyers of second hand clothing, there are some barriers

Insights

- **Non-buyers of Second Hand clothes assume;**
 - Poor quality, poor range and a more laborious search process.
- **Buying from charity or vintage retail conflicts with their 'self-concept' (identity/how they see themselves).**
 - They don't want to see themselves as the 'type' of person who needs to buy Second Hand.
- **Low trust and knowledge in buying Second Hand clothing online in particular**
 - May be riskier as difficult to determine product quality.
- **Many of the women would like to be more conscientious.**
 - However, they often do not feel like they have the control or resources to do so – many resorting to fast fashion choices as a 'need' rather than an outright desire or want.
 - Although brands that are considered 'too cheap' and 'having poor quality' are viewed more negatively, many of the women find themselves buying from these brands from time to time.

Study

Six discussion groups of women aged 18-34 years were asked their **reasons why they have not purchased second hand clothing**

What the women say...

Expensive to be conscientious

"When I went on holiday I went to Shein and bought like 30 things for €100. It was crazy. I didn't want to do it, but I needed it for the holiday."

Galway 25-35 years

Conflict with 'self-concept'

"I went to the second hand shop a bit further afield because I know it sounds awful but I was like what if I leave the shop and the parents of the kids at school see me."

Dublin 25-35 years



Section 3: Shopping for Second Hand clothing



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Shopping for Second Hand clothing: *Highlights*

Consumers take a more exploratory approach when buying clothing Second Hand. Many don't feel that Second Hand stores are a good option when they are under time pressure to find something to wear and most feel that it requires some element of luck on the day.

Second Hand propositions are currently misfiring with a large proportion of the population. Charity shops are felt to lack relevance for many. With vintage shops appearing to appeal to only a narrow cohort of shoppers (e.g. 'younger', 'hipster').

If we are truly to persuade people that Second Hand clothing is worthy of their love we must make it loveable. Starting from the outside in: the exteriors of most 'charity shops' are felt to remain uninviting.

Many have low trust in online Second Hand clothing providers. This is in sharp contrast to their experience of buying new clothing online in which there is near unlimited choice, ease, convenience, consistency and trust in the regulations of the provider.

In addition, buying clothing Second Hand is felt to be a more challenging thing to do for many, particularly in determining product quality. Many also find it a challenge to claim 'psychological ownership' over Second Hand items which can deter engagement.



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Have a different approach and expectations when shopping for Second Hand clothes

Insights

- The women take a **more exploratory approach** when buying clothing Second Hand.
- All accepting that there is a chance they will **not find what they are looking for** when shopping for Second Hand clothing:
 - Due to a limited supply of sizes, colours, etc.
 - In fact, all feel the need to go into a Second Hand store with **low expectations to avoid disappointment**.
 - Most feel that it requires some element of **luck on the day**.
- Many don't feel that Second Hand stores are a good option when they are **under time pressure to find something to wear** when:
 - Doing 'Mission based shopping', e.g. shopping for an upcoming event
 - Have the certainty of product availability (sizes, colours, etc.) among high street fashion (either retail or online).

Study

Six discussion groups of women aged 18-34 years were asked about **the barriers they experience when buying Second Hand**.

What the women say...

Exploratory approach

"I think I'd have to go in with an open mind and I kind of just go in for a browse. Like I don't think I could go in like with the intention of buying something".

Cork 18-24 years

Availability of time

"I didn't set out with the intent to go shopping but found myself in town with half an hour to kill. I had been walking on the street and some pieces in the window of the store caught my eye. I tend to only go shopping in a second hand store when I have some time and am not in a rush so I can go through rails piece by piece".

Galway 25-35 years



There are different attitudes towards charity shops and vintage outlets

The good feel factor of a charity shop

- Generally, the charity shop is the **most top of mind location** to purchase Second Hand clothing items.
- For many, this feeling of '**doing good**', can be as rewarding as the actual item itself.
 - Supporting the **charity, local employment etc**
 - Making an **ethical/sustainable choice**
 - But also **not purchasing** from high street brands
- However, many assume it will **lack items with relevance for them**.
 - And the act of shopping in a charity shop can **conflict with the self-concept** of many.

More 'commercial minded' vintage outlets have niche appeal

- Vintage outlets have **lower spontaneous awareness** (especially outside Dublin)
- Appearing to appeal to only **a narrow cohort of shoppers** (e.g. 'younger', 'hipsters').
- Meaning many others **don't feel like they have the 'licence' to shop there** (lacks relevance)
- In addition, for many (especially non advocates) it does not make sense to them to buy Second Hand clothing for the same price as new clothing.
 - They **don't place the same value** on 'unique' pieces.

Overall, Second Hand propositions **currently do not resonate** with a large proportion of the population. Charity shops are felt to **lack relevance** for many and vintage shops appear to appeal to only **a narrow cohort of shoppers** (e.g. 'younger', 'hipster').



Charity shops need to be more inviting to persuade young women to want their Second Hand offerings

Insights

The women less engaged with Second Hand clothes were tasked with buying a Second Hand clothing item. All chose to go to a charity shop in their local area.

There appears to be some consistent issues during their shopping experiences that would put them off revisiting:

- The exteriors of most of the charity shops visited are felt to **remain uninviting** with dark, unattractive window displays.
- The shop interiors are often **overwhelming, chaotic, lacking in clear purpose and very crowded**.
- Layout logistics and merchandising within the shops **are nil or confusing**.
- Discarded bin bags are often on display, reminding the viewer of clothing items' **'recent life' in a bin bag**.
- **Highly worn clothing items and older age profile of clothing** create a visceral negative response.
- The **smell of the shops' interiors** visited, whether real or imagined, is the most insurmountable reminder of the 'worn and discarded' nature of the wares.

Study

Six discussion groups of women aged 18-34 years were asked to **elaborate of their task of buying a Second Hand item**.

What the women say...

Hygienic concerns

"I know it sounds awful and sounds stuck up but I was actually retching even putting it into my car. Then I took it home and put it into a wash on its own, I thought I can't put that into a wash with all my normal clothes. What if whatever is on that comes onto my clothes then and then I am wearing them. It is washed at home, but it will probably need another wash, you know that kind of way".

Cork 25-35 years

Unpleasant smell

"The minute I went into the charity shop, there was a smell. It smelt like an old person's house".

Galway 18-24 years



Many have low trust in online Second Hand clothing providers

Insights

- Amongst the 25-35 year old age cohort, there appears to be lower awareness of online Second Hand clothing platforms.
- Younger age cohorts (18-24) appear to be more engaged with buying and selling clothing online:
 - Mainly through Depop which has quantity and searchability in its favour.
- Most are quick to point out deficiencies in buying Second Hand clothing online (both users and non-users of Second Hand online platforms):
 - Unregulated, e.g. no 'official' returns policy, relying on the seller to adhere to Depop guidelines.
 - Inability to fully inspect product.
 - Misleading and poor quality imagery of products online.
 - There is also the grapevine - "A friend of mine got a shirt with a stain on it...etc".
- There is admiration for early movers into Second Hand:
 - They bring credibility and curation which address some of the anxieties of the audience.

Study

Six discussion groups of women aged 18-34 years were asked about **their experiences with sourcing Second Hand clothing.**

What the women say...

Inability to fully inspect product

"You could buy something with a stain on it and its not going to be in the picture. At least in person you can check yourself".

Galway 25-35 years

Unregulated system

"Online can be really unregulated as well. I feel like Depop I could put up something and they just ... cleanliness you don't know that that person wash the clothes".

Galway 18-24 years



Buying Second Hand clothes is felt to be a more challenging process

Insights

- **Buying Second Hand clothes is felt to be a more challenging search process compared to buying brand new:**
 - The time required feels considerable (almost 'hobby' like)
 - The need to rifle through rails requires 'patience'
 - The skills required to know what to look for and what to avoid.

- **Most feel that buying Second Hand is a more complex decision process:**
 - There is a need to consider more factors compared to just buying new such as inspection of product durability, hygiene of item, etc.
 - These factors are taken for granted when buying new clothes.

- This need to put in **more time and effort** to search for and select Second Hand items is a considerable shift in mindset and experience for those women **trained for choice, convenience and ease:**
 - Especially amongst those who are more time poor (25-35 year olds).

Study

Six discussion groups of women aged 18-34 years were asked to discuss their **perceived barriers with buying Second Hand clothes.**

What the women say...

Patience required

"I actually ended up visiting a few second hand shops (6 total) all during the one outing. I found it hard to find something that I liked and was in my size. A lot of the clothes were very old fashioned and not targeted to people my age".

Dublin 25-35 years

Limited availability

"You don't have the range of option, sizes or colours when you buy second hand... you need to be more open minded when it comes to looking for something second hand".

Galway 25-35 years



There is a struggle to psychologically claim ownership over some Second Hand items

- **Smell penetrates - sensory cues** such as smells retained in the fabric points to evidence of past ownership.
- **Visual cues** such as fades in the material and even specific product features (e.g. open toed shoes) can result in a negative visceral response etc.
- This 'squeamish' response appears **heightened for some clothing categories** in particular – which consumers feel are off limits;
 - Particular clothing that is **in close contact with the skin**
 - e.g. leggings, vests, t-shirts, socks & underwear, shoes (generally 'high frequency item').
 - Most appearing far more comfortable buying and wearing Second Hand items that are **more distant from skin contact**
 - e.g. coats, hoodies, trouser/jeans
- The **ability to personalise items may help overcome consumer difficulty in psychologically taking ownership**. In addition, it is important for retail shops to be aware of the sensory and visual cues that prompt a negative visceral response.

Study

Six discussion groups of women aged 18-34 years explained **what could motivate them to buy Second Hand or buy more often.**

What the women say...

Lack of ownership of clothing items

"It freaks me out a bit wearing someone else's clothes. My sister recently bought some second hand clothes in vintage sales. I didn't even have an interest in looking at what they got. I thought it was so weird".

Cork 25-35 years

Higher concerns for items in close contact with the skin

"I would never go near shoes, I feel like everyone has a different shape of foot".

Galway 25-35 years



Section 4: Qualitative conclusions - Increasing engagement with
Second Hand clothing



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Qualitative conclusions: *Key Highlights*

Curation is a key enabler of engagement – consumers need to be introduced to how buying Second Hand is different, and helped along the way (especially for newcomers).

There is a need to redefine the value of Second Hand. The narrative around Second Hand clothing needs to shift from one of items that lack intrinsic value to one of rebirth and integration with the entire product lifecycle.

We need to revolutionise how we approach in store retail. We need to focus on creating an experience that draws consumers in, keeps them interested and keeps them curious about what might be in next. Moving Second Hand clothing on from its stigmatised past requires loud and proud communication from those who engender our trust.

Moving Second Hand clothing on from its stigmatised past requires loud and proud communication from those who engender our trust. As with much in the circular economy, persuading positive participation is key and new rewards are needed to replace the old.



Qualitative conclusions - Lead with Curation

- We are never going to be able to compete with the **certainty and scale** of regular clothing retail and it would be foolish to try
- We have a universe of women who at their least confident, are being asked to step into a world where they need to inherently trust their own choices.
- We also need to help them by **intelligently signposting** the way through the experience.
- We can learn a lot about the language of engagement in Second Hand shopping from thrifting.

- **Emotional curation and inspiration** are needed to create **normalisation** around Second Hand clothes
- We need to build leadership and inspiration - **treasures to be found**
- We won't necessarily have brand labels as signifiers of a treasure. We need people with **reach, taste and influence to advocate for sector**
- Curation doesn't need to be the preserve of the influencer or celeb. High street brand treatments of Second Hand clothes will likely draw **trust and consideration**
- We cannot trade too heavily on the concept of super premium treasure alone as there is a sense of **needle in a haystack in Ireland**: not enough of that kind of treasure to go around.

- **Practical curation is vital too** – the sense that someone cares whether you find something
- Signposting is well done online by conventional search functions but quality remains the blind spot
- Quality (brand and condition) and sizing are two of the most unstable dimensions of entering the world of Second Hand clothing
- Can we build suggestion pathways....not your size but love the style....look for X, leave a request for Y
- Seminally **the idea and language of thrifting has real purchase amongst the younger audience**
- Sign posting by price and value to create a sense of value and quantity is the alternate model

Curation is a key enabler of engagement – consumers need to be introduced to how buying Second Hand is different, and helped along the way (especially for newcomers)

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CIRCULAR ECONOMY PROGRAMME

The Driving Force for Ireland's Move to a Circular Economy



Riailtas na hÉireann
Government of Ireland

Qualitative conclusions - Redefining the value of Second Hand

- Of those who are currently buying or considering to buy Second Hand clothing, **few are actively engaged in selling.**
- **This is an important barrier to overcome as it unlocks sustained engagement with the circular economy –** increasing frequency of engagement with Second Hand clothing.
- **Consumers need to be encouraged and made aware that there is value in their Second Hand items.**
- The narrative around Second Hand clothing needs to shift from one of items that lack intrinsic value to one of **rebirth and integration with the entire product lifecycle.**
- A narrative in which consumers are **encouraged to see the value in selling Second Hand clothing and a narrative in which they can more easily claim psychological ownership of other people's items.**
- To get more higher quality clothing items in circulation, and to encourage higher engagement with the circular economy, it is important we shift consumer attitudes to recognise the **value of their Second Hand items.**



Qualitative conclusions - Evolve the physical environments

- The current propositions in the Second Hand clothing market **are misfiring.**
- Charity shops, which remain a core part of the Second Hand clothing market in Ireland, **need to be made loveable.**
- Places that evoke a **sense of curiosity** and **excitement** amongst consumers.
- Vintage shops will appeal to a certain cohort, but we need to consider how we make Second Hand more mainstream.

- It is possible for a charity shop to be a lovely space in which to explore
- Create enticing window displays in which the clothes are visibly revered and co-ordinated. Inspire!
- Lighting and space are in short supply in the imaginations of those who currently don't 'do' Second Hand
- These are easy fixes and instil a sense of trust and curation

- There is first a practical step of **removing cues that provoke a negative visceral response.**
- Windows that speak to nothing but abandoned items
- Smells that penetrate
- Removing poor quality items (with stains etc)
- Random adjacent objects which influence perceptions towards the stores clothing
- Better use of space and removing clutter
- Inject a sense of modernity – POS, use of technology, in store curation, changing room, lighting etc.

- There is then a more emotional step which should aim at **prompting sustained engagement.**
- Consumers **need to be rewarded** for their engagement with Second Hand clothing stores.
 - **Early access** to releases in store
- Scarcity as a tool for creating urgency to visit ('Lidl/Aldi middle aisle effect')
 - A key tool for building online communities and WOM
- There is also an opportunity to **leverage local talent.**
 - Local designers ranges etc.
 - Promoting the idea of rebirth and curation.

We need to revolutionise how we approach in store retail. We need to focus on creating an experience that draws consumers in, keeps them interested and keeps them curious about what might be in next...

Moving Second Hand clothing on from its stigmatised past requires loud and proud communication from those who engender our trust



Qualitative conclusions - Action to drive engagement and identification

Create a movement through loud coherent voices and events

Tie ups between nearby stores

Masterclasses by stylists, upcyclers and seamstresses

Tie ups between high street and charity to deliver trust and curation as well as the feel good factor

Use QR codes to redirect to other items you might like when something doesn't fit

Action to change the narrative

Teach and reward the behaviours that will underpin the change in perception of Second Hand clothing

Create ritual around rebirth to help move past the sense of prior abandonment

Moving Second Hand clothing on from its stigmatised past requires loud and proud communication from those who engender our trust. As with much in the circular economy, persuading positive participation is key and new rewards are needed to replace the old.





TEXTILES: UNDERSTANDING SECOND HAND CLOTHING QUALITATIVE STUDY 2022

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