

**Title:** ZMET study: Brides' thoughts on second-hand wedding dresses and the sharing economy.

**Abstract:** There is a clear need for reducing the environmental impact of fashion clothing. This paper argues that wedding dresses are a key topic for exploration due to their notable environmental impact. Currently there is very little understanding of how brides-to-be choose their wedding dress, and our research aims to close this gap by researching how, when, and why brides-to-be might engage with the sharing economy to acquire a second-hand wedding dress. Encouraging re-distribution of wedding dresses can make a significant contribution to lessening their negative environmental impact over time.

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### Introduction:

The sharing economy is a rapidly growing technology-enabled phenomenon that academics and practitioners have been grappling with since the early 2010s. Publications are increasing every year (Rojanakit et al., 2022) and Agarwal and Steinmetz's (2019) systematic literature review finds five core streams of work: sustainability, participant behaviour, regulatory frameworks, business models, and conceptual studies. There have been clear calls for research on sharing economy industries other than transportation and accommodation (Filser et al., 2020; Trabucchi et al., 2019), both of which have been heavily studied to the detriment of our understanding of other industries.

As the sharing economy grows industry, governments, and consumers are also working to reduce pollution and improve sustainability with mixed success. One industry that has received much attention and sometimes scorn is the fashion industry, where textile waste, manufacturing processes, transportation processes, and worker's rights regularly come under fire. Accusations of planned obsolescence and unethically propagating demand, especially within the young, have been well documented in the media.

Fashion clothing is a relatively popular area of participation in the sharing economy (Geissinger et al. 2020) but despite growing publications we still have many gaps in our knowledge since Park and Armstrong's (2017) call for research into collaborative fashion consumption. The use of sharing economy solutions may be one way to positively adjust consumer behaviour towards sustainability (Becker-Leifhold, 2018), but there are functional and psychological barriers to engaging with the broader sharing economy that could extend to fashion. These include the complexity of engaging, concerns regarding image, and fears of contamination (Hazée et al., 2017; Hazée et al., 2019).

With the increasing need to embed sustainability within business models and many gaps in the literature on consumer behaviour in relation to fashion clothing there is a clear need for research on second-hand clothing. We seek to make both a theoretical and practical contribution to enabling and enhancing sustainability in business models by understanding how brides-to-be engage with the sharing economy to acquire a second-hand wedding dress.

### Literature review:

In this section we review relevant literature with the intention of building a clear argument for the need for research. The sharing economy is "a web of markets in which individuals use various forms of compensation to transact the redistribution of and access to resources, mediated by a digital platform operated by an organization" (Mair and Reischauer; 2017, p.12). There are many routes to engaging across a variety of industries.

### **Second-hand clothing in the sharing economy:**

The fashion and clothing area of the sharing economy is quite large in comparison to some areas but understanding the size of the phenomenon or predicting growth is notably difficult

(Geissinger et al., 2020). Sharing economy practices typically encompass five key areas; renting, lending, swapping, donating, and purchasing used goods (Hamari et al., 2016).

Consumers attempting to acquire second-hand clothing, including wedding dresses, can engage in all of these practices. They may acquire a dress via word-of-mouth in family and friend networks, cutting out the facilitating role of business, but it's more likely they will interact, either online or physically, with or through a third party. The business model of brick-and-mortar second-hand fashion retailers typically allocates the customer a dual role, both as a purchaser, and as a (potential) supplier (Gopalakrishnan and Matthews, 2018), but this can also extend to online stores.

We still know relatively little about the decision making processes of this consumer group. In the case of acquiring second-hand wedding dresses, fashion rental seems to be the most popular, suggesting many brides are only taking a role as purchaser, and not as supplier. As a service, fashion rental enables consumers to temporarily access clothes or accessories for a set amount of time for a fixed price (Hu et al., 2019). Although renting clothing has become popular over the past decade, it is yet to become mainstream (Mukendi and Henninger, 2020).

With the rising popularity of fast fashion retailers, it is hard to change consumer habits of wanting to buy new items on a regular basis (Henninger et al., 2020). Indeed, after experiencing considerable growth initially, the fashion rental market has suffered considerable losses in recent years, with many companies struggling and some collapsing altogether, such as Menswear rental companies *Seasons* and *The Rotation* (Lieber and Chen, 2022). Even *Rent the Runway*, the most popular fashion rental company, which popularised the then practically unheard-of idea of renting clothes in 2009, has seen its stock drop by two-thirds since October 2021 and its net loss widened to \$87.8 million (Lieber and Chen, 2022). These losses are due to high operating costs on aspects such as dry cleaning and logistics (Lieber and Chen, 2022). However, the wedding dress hire sector has continued to increase in popularity.

### **The wedding dress:**

The COVID-19 pandemic hit the wedding industry hard, with the majority of weddings being cancelled, postponed, or downsized throughout 2020 and 2021. Yet, post-pandemic the sector is now booming, with market research showing that brides want weddings to be faster and more convenient, with fewer custom wedding dresses being bought and more purchased 'off the rack' than ever before (Lieber and Sergison, 2021). As a result of the wedding industry's revitalisation, the rules are changing with different purchasing habits, such as jumpsuits and separates on the rise, multiple wedding dress purchases for different parts of the day/multiple smaller weddings, as well as different modes of purchasing wedding dresses, such as online and through Instagram (Lieber and Sergison, 2021).

The concept of clothing rental has become more normalised over the last decade, and as a result, this trend has infiltrated the bridal industry and is set to rise over the coming years (Chilcott, 2021). Indeed, *My Wardrobe* HQ reported a 600% growth in its bridal rental business in 2020, highlighting the demand for more sustainable and less risky purchase for brides (Chilcott, 2021). This trend is suggestive of a successful and somewhat responsive industry, but it doesn't reflect the growing need for sustainability more widely.

The argument for advocating for more sustainable wedding dresses becomes clear when we consider some recent statistics. The latest available data shows nearly 235,000 marriages across England and Wales in 2018 (ONS, 2018). At most weddings the bride will wear a wedding dress. The average cost is approximately £1,500 (Bridebook, 2021), and it will be worn for around 10 hours. It takes 9000 litres of water to manufacture (StillWhite, 2021), produces 400 pounds of rubbish, and 63 tons of carbon dioxide (Harrison, 2008). Despite this, wedding dresses have been overlooked for a long time (Kwon, 2017).

The sharing economy provides a route towards lowering the environmental impact of wedding dresses by facilitating reuse. Market research shows that more brides are now opting for second-hand wedding dresses from platforms such as *StillWhite* and *The RealReal*, due to their more sustainable credentials and affordability (Suen, 2019). Dresses on *StillWhite* typically sell for 50-60% of their original retail price (Suen, 2019), suggesting consumers are happy to pay still relatively sizeable sums for a second-hand dress. Sustainability is increasing in importance, particularly for Gen-Z consumers, and wedding dress manufacturers are now incorporating more sustainable materials such as recycled polyester, as well as providing increased transparency surrounding their practices (Lieber and Sergison, 2021).

Overall sustainability and convenience are now becoming more prominent when it comes to purchasing wedding dresses and there seems to be a consumer appetite for change, or at the very least, choice. Understanding consumer decision making in this industry can be beneficial to all stakeholders in this industry. Despite all this, our review of the Scopus database (23/02/22) reveals very little information on how brides-to-be choose their wedding dresses and no research at all incorporates the sharing economy. Therefore our research aims to explore factors affecting consumer engagement with the sharing economy in relation to second-hand wedding dresses. We have three objectives as part of this:

- To identify where in the consumer decision making process consumers are considering sourcing a dress through sharing economy options.
- To understand which overarching factors are affecting their decision making, and how.
- To reveal underlying attitudes, beliefs, and behaviours influencing decision making.

#### Methodology:

Our study will interview brides regarding their thoughts on second-hand wedding dresses and by adopting a qualitative approach we answer the call for more qualitative sharing economy research (Rojanakit et al., 2022). Choosing a wedding dress can be a complex and intimate process for some and so we have chosen our data collection method carefully to ensure good quality, ethically collected data. We will use an alternative visual method named Zaltman's metaphor elicitation technique (ZMET) which is fully appropriate for eliciting deeper thoughts and feelings on this relatively sensitive and personal topic (Zaltman and Coulter, 1995). The benefit of using this method is that images enable a trusting bridge with the

interviewer/interviewees (Hancock and Foster, 2019) and counter depth deficit (Mulvey and Kavalam, 2010).

ZMET is an established visual methodology which has been used extensively by *OlsonZaltman* commercially and numerous academics across the globe (Zaltman, 2003). The technique is a hybrid multi-disciplined based visual methodology, which works by using a layered approach of established research tools to help uncover hidden inner thoughts. We aim to collect data from 18 participants to ensure qualitative saturation is achieved, although it is recognised that 12 interviews would also provide sufficient data for the study.

For the pilot study the candidates were briefed one week before the interview to choose 6 images which represented their own thoughts and feelings towards second-hand wedding dresses and the sharing economy. This enabled the interviewee to be primed and ready to participate in the interview. (Zaltman, 1997) The interview process uses nine steps such as storytelling, missed images, sensory metaphor probe and a montage construction. Hancock and Foster (2019) clearly explain the steps of the process in detail and suggest that practice is required to further develop skill in the technique. Data is analysed through the lens of metaphors, providing valuable insights in the frame of consumer decision making. Early findings can be shared live during the conference.

#### Conclusion:

Although work on the sharing economy has been expanding rapidly (Rojanakit et al., 2022) and the knowledge created has been diverse (Agarwal and Steinmetz, 2019) we are left with some important contemporary gaps. Our work to understand how brides-to-be engage with the sharing economy to source a second-hand wedding dress attempts to close one such gap. By unlocking this information we deepen our knowledge on a topic of sociocultural and environmental significance.

In future we will work towards answering Geissinger et al.'s (2020) call for research on turning the sharing economy into a business opportunity as opposed to a threat. There is also very little information available regarding what women do with their dresses following the wedding and we plan to address this in future work with a view to understanding how to improve supply in the sharing economy.

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