

Mestrado em Gestão de Informação
Master Program in Information Management

**ANALYZING THE COMMUNICATION AND
MARKETING STRATEGIES USED BY SECOND-HAND
STORES IN PORTUGAL AND THEIR INFLUENCE IN THE
ADOPTION OF SECOND-HAND CLOTHES PURCHASE**

Marta Maria de Oliveira Galvão Martins Faria

Dissertation presented as partial requirement for obtaining
the Master's degree in Information Management with a
specialization in Marketing Intelligence

NOVA Information Management School
Instituto Superior de Estatística e Gestão de Informação
Universidade Nova de Lisboa

**ANALYZING THE COMMUNICATION AND MARKETING STRATEGIES
USED BY SECOND-HAND STORES IN PORTUGAL AND THEIR
INFLUENCE IN THE ADOPTION OF SECOND-HAND CLOTHES
PURCHASE**

by

Marta Maria de Oliveira Galvão Martins Faria

M20200682

Dissertation report presented as partial requirement for obtaining the Master's degree in Information Management/ Master's degree in Statistics and Information Management, with a specialization in Marketing Intelligence

Advisor / Co Advisor: Prof. Teodóra Szabó-Douat, Ph.D.

March 2022

ABSTRACT

Fashion is one of the sectors that has increased in relevance over time while also increasing its environmental effect. Implementing the circular economy contributes to improved resource management and a more sustainable way of living.

Second-hand clothing (SHC) businesses are now popular across the world, but it's unclear why their popularity hasn't grown as rapidly in Portugal.

This study looks at what SHC is doing in Portugal as a marketing and communication way to achieve consumer preference for this mode of consumption. It's critical to evaluate and research what's now being done so that it might be improved and readjusted in the future. An experiment was done from the consumer's point of view, which included the creation of several potential campaigns with various focuses to assess the public's reaction and adherence. The findings are used to test the proposed model and suggest that there is a difference between those who have previous experience in this type of consumption and those who have never bought, so we should segment them differently. For those who have never bought SHC, the strategies should reflect the economic benefits that this model of consumption brings and the environmental impacts. Those who already have previous experience, are not as impacted by the type of campaigns presented, but the emphasis on low prices will also be beneficial. There is a clear urgency to re-educate consumers to think about their decision process in fashion consumption in Portugal, it is necessary to start gathering and reconciling the strategies used by better-known brands, and even fast fashion brands, to introduce this concept to the Portuguese shoppers.

KEYWORDS

sustainability; environmental impact; reuse; circular economy; consumption; marketing and communication strategies; fast fashion; second-hand clothes; second-hand clothes' stores; sustainable fashion

INDEX

1. Introduction	1
2. Literature review.....	3
2.1. Sustainable fashion.....	3
2.2. Second-hand clothing industry.....	4
2.2.1. Motivations	4
2.2.2. Barriers	6
2.3. Marketing in fashion.....	7
3. Methodology	10
3.1. Theoretical Model	10
3.2. Methodological Choices.....	11
3.3. Quantitative Method – Online Questionnaire - Data collection	12
3.3.1. Scales.....	12
3.3.2. Sample characterization.....	12
3.3.3. Results	12
3.4. Qualitative Method – Semi-Structured Interviews – Data Collection	15
4. Discussion	19
5. Conclusions	22
5.1. Theoretical Implications.....	22
5.2. Managerial Implications	23
5.3. Limitations and Future research.....	24
6. Bibliography	25
7. Annexes.....	29

LIST OF ABBREVIATIONS AND ACRONYMS

SHC - Second-hand clothes

1. INTRODUCTION

We all must become aware of the environmental impact of our way of life and the need to preserve the planet's limited resources. Fashion is one of the industries that has grown in importance while also intensifying its environmental impact over time. This industry itself is responsible for over 10% of global carbon emissions and approximately 20% of wastewater (UNECE, 2018). The estimated amount of clothing items barely worn or unused in consumers' closets in the United States is 9 billion. The projected annual quantity of clothing pieces thrown away is 36 billion. Almost all of it could be recycled or reused. (*Resale Report - Thred Up*, 2021). Fast fashion, defined as low-cost clothing lines that replicate current luxury fashion trends referred to as "quick fashion" (Fletcher, 2012; Joy et al., 2012, p. 4), contributes to these statistics. Nevertheless, nowadays the concern about sustainable fashion is growing, and with that, concepts such as slow fashion, circular economy, and second-hand consumption have been explored.

Slow fashion is a quality-based concept of fashion. It is more expensive than fast fashion (Schrewentigges, 2018) but respects the use of local resources and the transparency in production (Wischer et al., 2020), also focuses more on conscious consumption. The circular economy has a focus on profit but adopts closed-loop techniques to regenerate the product. (Gazzola et al., 2020; Schrewentigges, 2018; Wischer et al., 2020). With the importance of these concepts increasing, buying and selling second-hand clothes is already a reality in many countries around the world. The secondhand market is worth 25 billion euros and is growing at a rate of 12% per year around the world. According to a recent Boston Consulting Group report, the global secondhand market is expected to increase at a CAGR of 15% to 20% over the next five years. (Willersdorf, 2020). However, the need to keep up with current trends and to be continually updated on the latest styles delay the mass adoption of second-hand clothes purchases (McNeill & Venter, 2019). In Portugal particularly, this market is not expanding as quickly as in some other countries, so this calls for analysis to understand why.

Several studies have been developed to understand the reasons and barriers for the adherence to (or the avoidance of) the second-hand clothing model. According to literature, cheap prices are one of the strongest motivations to buy second-hand clothes (Farooq Baqal et al., 2018; Gopalakrishnan & Matthews, 2018), as well as the uniqueness of each piece and the emotional worth they represent (McNeill & Venter, 2019), but there is still a lack of information about the effectiveness of these findings on the seller's side, and specifically in second-hand physical stores. There is no information regarding the marketing and communication strategies used by them and it is necessary to understand if the current strategies are being well implemented and effective in Portugal, as one of the biggest barriers to buying SHC is the unfamiliarity with SHC stores (Silva et al., 2021). Previous studies considered only the consumers' perspective, word-of-mouth, and online strategies (Lo et al., 2019; Mohammad et al., 2020) but did not explore the communication strategies of the physical stores.

The purpose of this study is to understand the communication and marketing strategies currently used by second-hand clothing physical stores, and those that operate both physically and online, in Portugal. The idea is to understand whether the current strategies influence adherence to this type

of consumption or not, and the impact they are having from the perspective of the consumer. The ultimate objective of this research is to investigate and analyze which campaigns would be most effective from a business point of view and what factors should they focus on. The consumer's role in this industry is crucial and highlighted (Machado et al., 2019) in a wide range of studies, but it is always necessary to understand the other side of the coin and try to improve it. To accomplish these goals, three main questions are asked, the first one is "*What is currently being done in marketing and communication second-hand businesses in Portugal?*" the second one is "*How does this influence adherence to this type of consumption?*" And finally, the third one, "*What can be done to improve the marketing and communication area and increase the consumers' willingness to buy second-hand clothes?*".

This research will help SHC stores to understand what is failing and how to improve their communication and marketing strategies efficiently, giving them insights to increase the consumers, revenues, and also for those who want to enter this industry. It aims to increase the adherence to this type of consumption adding information about the topic because one of the consequences of increasing sustainable fashion is helping to combat the impacts of fast fashion on the environment.

Regarding the structure of this thesis, the next chapter is the *Literature Review*, where all insights learned and collected from previous research are described, which enabled the creation of hypotheses that will be proven or not through the theoretical model. It includes knowledge about sustainable fashion, impacts of this industry, concepts related to the circular economy, what moves people to join this type of consumption, what prevents them from joining, what still needs to be done to normalize the purchase of second-hand clothes in Portugal, and also tells us more specifically about the area of fashion marketing. Next, the *Methodology* chapter begins with the creation of the theoretical model (*Figure 1*) based on the hypotheses developed in the previous chapter, also explains the methods used in data collection, as well as the data collected, and their analysis, then we have the *Discussion* chapter where the data collected before are summarized, compared with some previous studies and findings and finally the *Conclusion* chapter with theoretical implications, managerial implications, limitations and future research where we conclude the main takeaways of the research to further refine the topic studied.

2. LITERATURE REVIEW

2.1. SUSTAINABLE FASHION

In recent years, there has been a lot of discussion regarding sustainability in the fashion business. The effect of fashion on the environment cannot be ignored, and people start to become extremely worried about the current situation of our planet.

The global consumption of fashion will increase from 62 million tons in 2015 to 102 million tons in 2030 (Moutinho et al., 2019; “Novo Consórcio Da Indústria Da Moda Para a Economia Circular,” 2020).

Every year, 20 units of clothes are produced per person in the world. According to the Portuguese Environment Agency, the Portuguese throw around 200.000 tonnes of clothes in the trash each year. It is anticipated that by 2030, the entire quantity of clothing waste might reach 148 million tons, which is comparable to the global yearly waste of 17.5 kg per inhabitant (Lau et al., 2017; Loetscher et al., 2017; Moutinho et al., 2019).

Based on the data given and the growing amount of clothing in landfills, implementing a circular economy in this industry is already a requirement. The rhythm of fashion consumption has grown dramatically (“Novo Consórcio Da Indústria Da Moda Para a Economia Circular,” 2020) and that’s how the concept of fast fashion emerged, which quickly became dominant.

“Fast fashion” is the term used to describe inexpensive clothing created using low-quality materials to replicate luxury trends for people who cannot afford them (Ozdamar Ertekin & Atik, 2015; Wischer et al., 2020). The main focus is time-based so the products have short durability and are mass-produced (Maria et al., 2021). The popularity of this type of consumption escalated to the point where retailers and designers had to react rapidly to meet demand (Ozdamar Ertekin & Atik, 2015). Collections are introduced regularly, so there is always something new to choose from, and because it is cheap, consumers can purchase more (Claudio, 2007).

According to literature, even if customers who purchase more clothes are less willing to recycle, fast-fashion buyers have a favorable attitude about the environment only if the clothes were produced with high-quality materials and there is a huge possibility that they might recycle (Joung, 2014).

As fast fashion generates pollution at every stage of the product life cycle (Claudio, 2007) there is a contradictory concept named “slow fashion” that emerges to lower the impacts of fast fashion. Slow fashion is a movement focused on quality over quantity (Schrewentigges, 2018). It emphasizes sustainability and transparent production (Maria et al., 2021; Ozdamar Ertekin & Atik, 2015; Wischer et al., 2020) which leads to more expensive prices, but also makes the need to buy less, as the products last longer (Schrewentigges, 2018). Even so, nowadays there are some barriers to adopting a sustainable fashion, and according to (Ozdamar Ertekin & Atik, 2015) the main ones are the lack of transparency and resources, as well as the lack of awareness and confidence in fashion brands, the attitude of the consumer also needs to change because, even though they are aware of the harmful implications for the environment and their life, they do not modify their behavior.

Nevertheless, there is another concept in fashion called “circular economy” which can be defined as a business model that operates circularly, that aims to increase the lifespan of materials, regenerate the flow of resources, and minimize waste and residues that turn into garbage (Saraiva dos Anjos, 2019). This increase in the life of materials is achieved through closed-loop strategies and one of the most common and efficient ways this happens is through reuse. It is a continuous cycle of production and consumption (Geissdoerfer et al., 2018; Machado et al., 2019; Wischer et al., 2020).

According to the World Economic Forum, the Fashion Industry's future is not a matter of how, but rather of when it may become entirely circular (“WEF_Annual_Report_18-19,” 2018) when the life cycle of products we wear is extended, it can help cut 30% of the industry’s carbon emissions (McKinsey, 2020).

2.2. SECOND-HAND CLOTHING INDUSTRY

And when we talk about reuse, in the fashion industry we are referred to the second-hand clothing industry, which has been growing exponentially in recent years and is expecting to expand in the next five years, hitting 77 billion dollars. (*Resale Report - Thred Up, 2021*) Second-hand products are goods that have previously been owned and utilized before (Cervellon et al., 2012; Sihvonen & Turunen, 2016). It is important to mention that as shown in recent research, second-hand luxury is increasing at a rate of 12% per year and already accounts for 7% of the personal luxury market (BCG - Boston Consulting Group & Altagamma, 2019).

However, there are still significant challenges to overcome regarding this market in Portugal. Only 8% of Portuguese people commonly buy used clothing. Sustainable fashion is still undeveloped in this country. In terms of clothes recycling, it is still in its early stages (Oliveira, 2021).

Many studies have been carried out on what can influence, positively or negatively, the motivations and barriers to second-hand consumption. Although there are different findings on what influences more or less the adherence to buying and selling second-hand clothes, it is important to highlight which are the most important moderators and why. Personal needs must inspire sustainable consumption to link with personal ideals or motivations for involvement in pro-environmental actions (Hur & Cassidy, 2019).

2.2.1. Motivations

According to the literature we should select three main dimensions to talk about the motivations in this industry, whether it is in the luxury industry or not. According to (Machado et al., 2019), these dimensions are independent of each other. There is some disagreement regarding the importance of the motivations in the life of consumers.

The first, being enunciated by some studies like the one that has more weight in motivation is the economic dimension (Arditi di Castelvetere, 2017; Laitala & Klepp, 2018; Lo et al., 2019; Turunen & Pöyry, 2019) that we can state that has a relationship between financial and personal reasons and social relations (Machado et al., 2019).

Assuming that the product has already been used, it is not worth 100% of the initial value, even if it has not even been used by the previous owner but the fact that it is not being bought for the first time causes a substantial decrease in the price of a second-hand product. The price of used goods is frequently calculated depending on the product, brand, quality, and style (Gopalakrishnan & Matthews, 2018). However, there are cases of items that are considered vintage and limited editions, and even though they are used, their value increases.

In a society managed by consumption like the one we live in, low prices always have a positive impact, and when there is the possibility of having cheap prices for good quality products (Machado et al., 2019), there are not many people who think twice. Low prices are therefore very appealing, especially for expensive brands (Gopalakrishnan & Matthews, 2018) either because of the possibility of saving, because this is the only way they can get a certain product, or because it gives them the freedom to spend their money elsewhere (Turunen & Pöyry, 2019). For most people, the price of a product is one of the biggest, if not the biggest, influencers in the purchase decision (Farooq Baqal et al., 2018). Some studies refer to the value for money, and with low prices, it is an opportunity to "get the best value for their money" (Elias, 2020, p.18).

Lo et al., (2019) concluded that substantial economic gain encourages a willingness to suggest, emphasizing the appealing economic worth of secondhand shopping. When we talk about the economic benefit of the second-hand clothing industry, we cannot only refer to the low prices but also the economic incentive for those who sell the clothes or give the second-hand shops to do so. For second-hand clothes to be sold, the owner of those pieces must want to sell them, which also brings economic benefits, as they always earn part of the value they spent when they first bought the piece (Gopalakrishnan & Matthews, 2018).

Cervellon et al., (2012, p. 8) consider the more frugal the shopper, the more likely they are to buy second-hand clothes (Aycock, 2021). Some researchers consider frugality as a lifestyle (Cervellon et al., 2012), they are thoughtful people who are not materialistic. They do not fall into the impulse and temptation to buy without really needing it, and they take pleasure in saving (Arditi di Castelvetero, 2017; Shoham & Brenčič, 2004).

The second dimension to be highlighted is the hedonic dimension. Hedonic benefits can be considered more emotional than the others. Within this dimension, we conclude that there are several reasons to opt for second-hand fashion, such as the desire to be unique; the nostalgia created by the purchase of older and even vintage items that may have several past histories, the treasure hunting when buying in a second-hand shop and the experience of a different atmosphere from traditional clothing shops (Laitala & Klepp, 2018; Lo et al., 2019; Turunen & Pöyry, 2019). The concept of treasure hunting has a huge impact on the choice of buying a second-hand product and can be defined as the desire to find something that pleases the consumer, even if they are not looking for anything in particular, the act of going searching, without anything in mind, having the pleasure of finding almost like a "surprise" something that satisfies any kind of need gives the consumer a sense of value (Park et al., 2020). Thus, we can say that the hedonic benefits are closely related to perceived value regarding a product, which can be affected by positive emotions. Perceived value is not only about quality and price but also about the uniqueness of a product (Sihvonen & Turunen, 2016), and is the consumer's judgment of the advantages gained concerning the sacrifices made (Fernando et al., 2018).

The third dimension concerns the ethical and ecological benefits where sustainability and the fight against overconsumption are the main drivers (Lo et al., 2019; *The Future of Fashion Resale-July 2021*, 2021). Recycling, reusing, trying to improve the supply chain, and minimizing ostentation are examples of the pillars of this dimension (Aycock, 2021; Machado et al., 2019). According to the director of sustainability at Farfetch, sustainability is the "biggest growth driver of this segment" and for this very reason, an environmental impact calculator was created on the Farfetch website, to have access to the environmental footprint of garments and materials (C. Silva, 2021). People driven by this dimension, when choosing second-hand fashion, aim to decrease the impact caused by them, since fashion itself is part of the biggest pollutants on our planet (Oliveira, 2021).

From the main motivations, it is possible to formulate two hypotheses.

H1: Current marketing and communication strategies of SHC stores have a low or null impact on people's perception of that market, in Portugal.

H2: The majority of people who already buy SHC started to buy SHC with no influence of a marketing campaign.

2.2.2. Barriers

However, in addition to motivations, there are always several points that inhibit and act as a barrier to the adoption of this type of consumption. The biggest challenge, according to a few findings, can be defined as social motives. Especially, in Portugal, the weight is significant.

Although SHC is a growing market, there is still a stigma, or social embarrassment in Portugal regarding the purchase of second-hand clothes, (S. C. Silva et al., 2021) because SHC is a simple action to help fight the waste and the effects of fast fashion consumers, it is something that needs to be explored, however, even with a lot of positive aspects there is a long path to mobilize the majority of people (Harris et al., 2016).

Perhaps because it was an industry that began for the financially disadvantaged (C. Silva, 2021), there are still many countries, although fewer and fewer, that are unable to accept that it is an industry for everyone. People who are already consumers sometimes feel judged, or ashamed, to know that they are shopping second-hand (Elias, 2020).

S. C. Silva et al., (2021) argue that acceptance for this type of consumption increases with the increase of their experience and according to their findings consumers are negatively influenced by the possibility of being associated with a lack of economic power for buying second-hand clothes. The following hypothesis is proposed as a result of this information:

H3: There is an association between people who buy SHC and lower socioeconomic power, in Portugal.

However, it is a stigma only created by those who have no experience in buying or selling second-hand clothes (Lo et al., 2019; S. C. Silva et al., 2021).

Hygiene and dirtiness are also factors that could negatively influence entry into this industry (Laitala & Klepp, 2018) although it is a barrier identified more by those who have never experienced any purchase and has had more influence in the past than today (S. C. Silva et al., 2021). Finally, the last barrier identified as the most relevant is related to the unfamiliarity of the shops, as well as the poor organization from the ones that exist (Laitala & Klepp, 2018), and the lack of information of the channels through which they can buy second-hand items (S. C. Silva et al., 2021).

Despite not being classified as a motivator or a barrier, nowadays resale potential is also a very prominent and direct influencer when buying an item, which indicates that more and more people are considering at least second-hand sales (Liao & Chu, 2013). The online clothes resale sector has grown at an average pace of 82%. According to the (BCG - Boston Consulting Group & Altagamma, 2019) report, for example, 57% of generation Z (people born after 1996) consider resale value while acquiring luxury products, and 44% of overall True-Luxury consumers also did it, so we can state:

H4: Younger generations are more willing to participate in the second-hand clothing business.

Although we live in a digital age, the importance of knowing second-hand shops is important, because it is a unique and different experience from the normal retail experience.

The atmosphere and uniqueness could be an incentive to buy for those who have the desire for treasure hunting as explained above and could act as a trigger for the ones who don't know the business yet. But for that, people need to know they exist, which in Portugal, is still not very common. However, some researchers identify as a barrier the stores' layout, organization, and selection of clothes, as well as their location (Farooq Baqal et al., 2018; Laitala & Klepp, 2018) which should be factors to be taken into consideration for improvement in all types of stores open to the public, but are conditions that differ a lot from country to country.

However, as technology advances, we know that the in-store experience is beginning to lose its importance and, in the future, (Schrewentiggas, 2018) will likely be completely replaced by the digital marketplace, as the online clothing resale sector has grown at an average rate of 82% (Arditi di Castelvetera, 2017).

According to some data, we conclude that only 8% of Portuguese people make second-hand consumption a frequent habit. And through a study conducted by *My NameTags* (a British company of personalized labels that operates in Portugal and wanted to learn more about the national clothing cycle's behaviors and trends), 46% of people who completed the questionnaire said they had never bought anything second-hand and 58% revealed that they have pieces in the wardrobe to use for the first time (Oliveira, 2021).

2.3. MARKETING IN FASHION

Good and close communication is always an essential strategy when operating a business, however, industries have different ways of operating and consumers have different ways of acting. First, it is necessary to understand the decision-making process and with this establish strategies to attract and gain consumers who become loyal and who consume more than once (Court et al., n.d.). Brand awareness is quite important to stay within the limited set of brands that lead the consumer to make the purchase, if brands don't create an initial impact, have already lost their chance.

The main purpose of marketing is to reach out to customers when they are on their most influential occasions. It is necessary to have a deep understanding of how consumers make decisions, who our consumers are, and the triggers and moments where we can influence them the most, it is a long road that will always have to be adjusted over time (Court et al., n.d.).

In the fashion industry, the brands need to reinvent themselves constantly and besides the traditional advertising methods such as fashion shows, promotions on stores, and catalogs (Saraiva dos Anjos, 2019) nowadays digital marketing strategies are the most common, also because many brands no longer even have a physical store and therefore there was a great development and advancement of digital platforms (Gazzola et al., 2020).

There is a curious case, which happens with the most famous fast-fashion brand of our times, that is the inexistence of marketing campaigns of Zara, the leader of fast fashion opts for a very simple and discreet strategy, where the stores have been the heart of Zara's business. Zara has almost zero investment in advertising and invests more in the location and ambiance of its shops, the brand depended heavily on word-of-mouth and unpaid public relations, which emerged from photos of celebrities wearing Zara items daily (Lago Barbosa Ortigão de Oliveira, 2014).

When comparing with the biggest fast-fashion competitors, the scenario is no longer the same, the brand MANGO spends a lot of money on marketing communications like billboards and commercials featuring popular models; the brand H&M is also another example of a fast-fashion brand that invests a lot on advertising with famous models and one of its strategies is to provide a limited and exclusive collection in collaboration with some of the fashion industry's most powerful people (Lago Barbosa Ortigão de Oliveira, 2014).

But with the need for innovation in fashion, comes the need to keep up with trends, and the most prominent themes in recent years have been sustainability, conscious fashion, eco-fashion, circular economy, and there are already many brands that, despite having no eco-friendly products and/or policies, felt it necessary to join this trend (Court et al., n.d.). H&M was one of the pioneers in fast fashion brands and tried to be the "sustainable choice" by introducing greener methods and pieces of clothing (Lago Barbosa Ortigão de Oliveira, 2014).

However, it is important to understand what the brands that already correspond to sustainable values do to make themselves known. When we talk about second-hand clothes stores, we cannot directly compare their marketing investment with traditional retailing channels because, they use more discrete marketing methods rather than mass media advertising tools, maybe because of the ambiguous societal approval of secondhand consumption (Lo et al., 2019). There are also research saying that due to constraints of the business they could not afford expenditures on advertising and marketing, or because there is already enough information and advertising that they do not want to overload the consumer (Gopalakrishnan & Matthews, 2018).

According to (Park et al., 2020) it is necessary to reposition thrift stores as a "sustainable fashion shopping destination", however, other authors say that experimenting influential marketing is the way to go (S. C. Silva et al., 2021), and a strategy with cause-related marketing initiatives. Based on that, it is plausible to predict:

H5: The existence of a marketing campaign positively influences the willingness to buy SHC.

It is vital to help the social and cultural levels for them to comprehend the problems of sustainable consumption and to promote alternative marketing operations (Hur & Cassidy, 2019) with the focus on changing consumption habits.

Through the study made by S. C. Silva et al., (2021), we concluded that, in Portugal, the biggest reasons for not buying second-hand clothes come from not knowing that these stores and channels exist and/or from the social embarrassment of buying something used. Since the marketing campaigns aim to make these shops known, compiling and analyzing all of this information, the following hypothesis was developed:

H6: The most effective marketing/communication campaign is the one that focuses on trying to reduce the social stigma about the social embarrassment of buying second-hand clothes.

3. METHODOLOGY

The methodology section is divided into four parts, the first one is the creation of the theoretical model (3.1), the second one is the methodological choices (3.2). The third part refers to the data collection process from the questionnaire (3.3) and subsequent data analysis and results process (3.3.1 to 3.3.3). The last part refers to the data collected from the qualitative method (3.4)

3.1. THEORETICAL MODEL

A theoretical framework (*Figure 1*) was designed to evaluate the validity of hypotheses developed based on previous literature and research

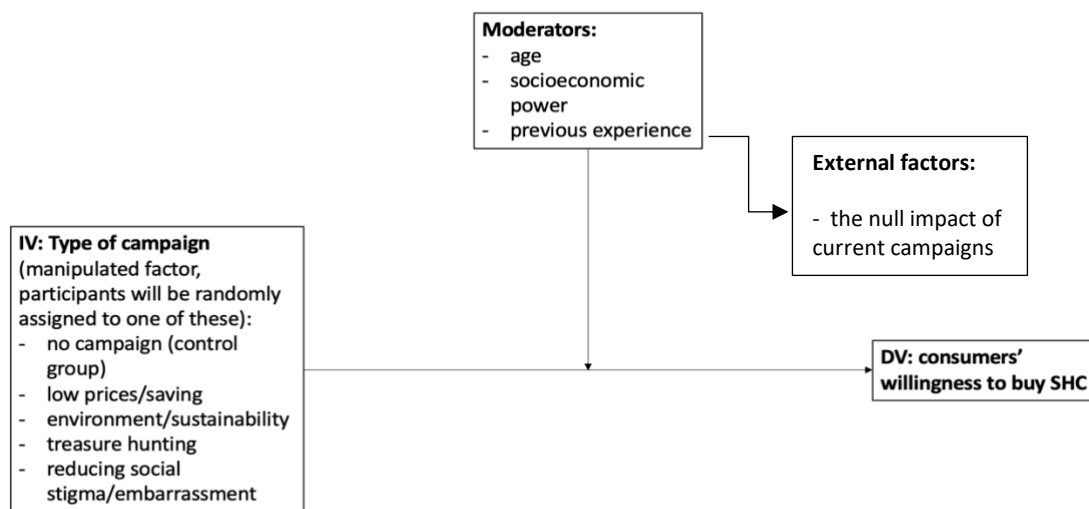


Figure 1. – Theoretical Model Framework

The ultimate goal here is to measure the participants' willingness to buy second-hand clothes, depending on the marketing campaign they were assigned to (dependent variable – DV). So, an independent variable (IV) was created, which is the "Type of campaign", where there is the manipulated factor since the participants will be randomly assigned to one of these five: 1- the control group, which will not be exposed to any type of campaign; 2- key visual with an environmental focus (*Image 1*), reverting to the importance of sustainability; 3- key visual with a focus on low prices (*Image 2*); 4- key visual with a focus on the concept of treasure hunt for the uniqueness of the pieces and finally (*Image 3*); 5- key visual with a focus on trying to break the social stigma towards those who buy second-hand clothes (*Image 4*), and depending on which of these five is shown, the willingness to buy second-hand clothes will then be assessed. With this, it will be shown if the existence of a marketing campaign positively influences the willingness to buy SHC, and which of these focuses is more efficient, proving, or not proving, that the lack of information about SHC stores negatively influences the number of people interested in becoming consumers.

However, there may be some moderators that influence this decision-making according to the previous research and they are: age of the participant - assuming that young generations are more willing to buy SHC, their economic power - trying to understand if there's still an association between people who buys SHC and low socioeconomic power, and previous experience in buying and selling second hand - assuming and trying to understand the veracity of that previous experience started with no influence of a marketing campaign, and the campaigns that have currently been done still carry no weight in the decision to continue buying and the perception about the market, in Portugal.

3.2. METHODOLOGICAL CHOICES

The idea of this study is to understand whether or not, the strategies of marketing and communication currently used, influence the adoption of second-hand fashion consumption. It is necessary to investigate what is being done and the impact of those campaigns from the perspective of the consumer, to reach the ultimate goal which is to investigate which campaigns would be most effective from a business point of view and what factors should they focus on. So, to achieve these results the research was divided into two parts, conclusive research with an experimental design is carried out through an online questionnaire (*Table 1*), and exploratory research with a qualitative method was also carried out through semi-structured interview with the responsible heads of several second-hand businesses in Portugal so that we have an insight not only from the consumer side but also from the market side. This last method was chosen for the detail required, and the fact that each business has its differences and particularities that do not allow an analysis by the quantitative method, that is, with numerical scores. Thus, the results are more specific and detailed (Belk et al., 2013).

Regarding the questionnaire with the experiment, since the aim is to collect information about the Portuguese market, the survey is intended for people who live in Portugal, consumers, and non-consumers of SHC, people who are already familiar with the concept, and people who are not. With this survey, it is possible to get an idea of the familiarization of this sample of Portuguese population with the concept of second hand, possible barriers and motivations, their participation in this market and willingness to do so, as well as the perception about the marketing and communication made by this industry in Portugal. An experiment was made through the questionnaire that consists of the creation of 4 different key visuals (*Images 1 to 4*) of possible marketing and communication campaigns of second-hand clothing stores, each one with a different focus. These focuses are sustainability, low prices, the desire for treasure hunting, and breaking the social embarrassment, these focuses were chosen according to previous research because they are the most influential in this industry. In the first part of the survey, each participant was randomly assigned to one of these campaigns and some participants were the control group, not assigned to any of the four, so as not to be influenced measuring their willingness to buy SHC, and second-hand luxury clothes, and the willingness of selling their own clothes. Next, was tried to understand who already knew about this concept of second-hand fashion and the previous experience, how they discovered it, what motivates or hinders them to join this type of market, and even more specific questions about the way the Portuguese market communicates and its frequency, the last part refers to demographic issues of the participants.

3.3. QUANTITATIVE METHOD – ONLINE QUESTIONNAIRE - DATA COLLECTION

3.3.1. Scales

A seven-point Likert scale was chosen to measure all constructs referred to the willingness to buy or to sell (1: not definitely; 7: definitely) and the variables measuring agreement or disagreement with certain statements (1: totally disagree; 7: totally agree) and also two personal consideration questions on the impact of marketing campaigns (1: no impact; 7: a lot of impact) and impediment on buying interest (1: no impediment; 7: totally impedes). In the questions where the frequency of an event was measured, a scale from rarest to most frequent was chosen (never; about once a month; about once a week; more than once a week). There also were some direct questions with a nominal scale of “yes” or “no” answers. And finally, for the variables such as barriers, motivations, where to buy, circular economy the scales were chosen because of their relevance in this research. Table 1 summarizes the scales and where they were adapted from.

3.3.2. Sample characterization

The online questionnaire was developed on the Qualtrics platform, shared on social media platforms such as Instagram, LinkedIn, Facebook, and WhatsApp, between the 8th of December 2021 and the 15th of January 2022. 241 responses were collected, but 14 participants were excluded because these participants did not understand the real purpose of the campaign they were assigned to, making a total of 227 valid responses for analysis. The data were analyzed using SPSS version 28. The questions were made in Portuguese and translated to English afterward.

Of the valid responses for analysis, 63% of the participants were female and 33,9% were male. The mean age is 36,3 years (SD=14.005) and the age range is from 15 to 70 years. 18,5 % reported having a monthly income greater than "3000" euros, followed by 17,2 % with a monthly income between "601–1,200" euros, and 16,3 % with a monthly income between "0-600" euros.

3.3.3. Results

Some crosstabs analysis between the categorical demographic variables and the experience variable of willingness to buy SHC were done and nothing significant was found to report, except that the monthly income range that would be most willing to buy second-hand clothes would be the lowest of the options, "0 to 600" euros, and the least willing to buy the second-hand clothes was the highest income range of the options "+3000" euros, and an analysis per generation was done in order to understand who are the generation more likely to buy SHC.

The age of the participants who responded about their willingness to buy SHC, equal to or greater than 5, was considered. Assuming Generation Z (born from 1995 to 2010) N=92 participants, Millennials (born between 1982 and 1994) N=14, and generation X (born between 1965 and 1981) N=92, within their generation the percentage of willingness to buy second-hand clothes was found, as indicated in the attached Graph 1. The generation most willing to buy SHC is undoubtedly the youngest, Generation Z, followed by Generation X.

In order to understand the participants' knowledge about this market, and their participation in it, whether or not they are consumers, main motivations, barriers, and preferences some questions were asked with response options based on literature and text boxes, in case the options did not fit

with the participant. From the total (N= 227) 7,9% of the participants did not know the concept of SHC yet and 52% never bought any second-hand item. More participants already purchased (48%) an item than the ones who sold (39,6%), and through a crosstab analysis, we can conclude that 58 participants (25,5%) already purchased and sold a second-hand piece of clothes, 86 (37,8%) participants never did any of these actions. 14% never bought but already sold, and 22,4% already purchased but never sold anything.

The respondents (N=227) 63,4% prefer to buy in physical shops rather than online but 20,7% do not have any preference, however, for those who have already made at least one purchase (N=109) of second-hand clothes we conclude that the channel most used for these transactions is “from a friend or known person”, followed for “physical store”.

The biggest motivation was studied only for the group of participants who were not subjected to any campaign, i.e., the control group because by not being subjected to any campaign they would not have been influenced and their response would have been the most genuine possible. With this, we conclude that for this group of participants (N=51) the biggest motivation to buy second-hand clothes is “low prices” for 47% of these participants, and the “sustainability” (21,5%), within the existing options.

Regarding the biggest barrier to buy second-hand clothes it was analyzed the responses of the control group separately from the rest of the participants but the responses followed the same variation, so as the main impediment to consumption stands out the topic of hygiene (66.1%) and going against what was mentioned "social embarrassment" was only indicated as the main motivation by 4% of the participants, even out of the available options 3% of the participants indicated that the condition and quality of the clothing was the biggest barrier to joining this type of consumption.

Although with this sample of participants we only had 4% indicating that social embarrassment would be their biggest barrier to buying second-hand clothes, it does not mean that for the remaining participants it is not one of the barriers, just not the main one, so they were asked directly to evaluate the following statement "There is an association between those who buy second-hand clothes and low economic power.", measured with a 7-point scale where 1 was “totally disagree” and 7- “totally agree”, the average of the responses was 3.22 (SD=1,785), and the mode was 1 which evidence that the majority of people who answered disagree with the statement, thus not proving H3 where it was assumed a relationship between people with low economic power and people who buy second hand, and when a crosstab analysis is done, it shows that none of the participants who measured their willingness to buy SHC as 1 (no definitively), totally agree with the statement.

Regarding the perceptions of the Portuguese market by the participants, most of them were informed about the existence of second-hand shops in Portugal. When asked if they agreed that there were few SHC shops in the country, the mean was 2.63 (SD = 1.972), which is much closer to 1 than to 7 and the mode was 1, meaning that, in general, people in the sample did not agree with the statement. Although the perception of physical shops is positive, there is also a tendency, $M= 4.76$ (SD=1.984) in agreeing that the market in Portugal is underdeveloped, as the same number of answers the mode of this question was 5 and 7, which shows that most people agree with the statement. Most of the participants admitted that they donate clothes they no longer wear and that no longer fit.

In terms of the communication of this business, on the consumer side, it was reported that 58.1% of the participants have never seen an advertisement regarding physical second-hand shops, but when it comes to online shops this percentage drops significantly to 29.5%. There are differences in the frequency of advertisements for physical shops and online shops, and the mode of these two questions was "never" and "approximately 1 time per month". When it comes to physical shops, only 4.8% of participants said they saw ads "more than 1 time a week", but for online shops already 17.2% report seeing them "more than once a week". When doing a crosstab analysis, we notice that from that 4,8% there is 72,7% also answered "more than once a week" regarding the online stores, which makes a total of 3,5% of the total studied population (N=227) that see advertisements, whether from physical or online shops, more than once a week. From the available answers, it can be seen that most of the participants discovered the concept of second-hand clothing through social networks and/or through their friends.

Measured with a 7-point scale, participants were asked whether or not they could be impacted in their decision to buy second-hand clothes through marketing campaigns (M=4.4; SD= 1.773) and whether the fact that the lack of information about physical shops prevented them from having an interest in buying (M=4.16; SD= 1.879), both questions obtained a mode of 5 and means higher than 4 which is the neutral element of the scale.

There was a question about a possible strategy implemented by several international world-known brands, which we already see one or another starting done it but still on a very small scale. The question had the intention of understanding the willingness of the participant to engage in second-hand consumption if a world-known clothing brand creates a resale section of their used items from past collections (or even the current collection), the answers being evaluated also with a 7-point Likert scale where 1=definitely no and 7=definitely yes, were quite positive with a mode of 7, the most frequent answer (M=5.03, SD=1.879).

Moving on to the results of the experiment that was done, by designing 4 marketing campaigns with a different focus. There was a portion of people in the sample (N= 51) who were not subjected to any image, therefore representing the control group of the experiment. The remaining participants, (N=43) viewed the image about sustainability, (N=46) about low prices, (N=43) about "treasure hunting" and (N=44) viewed the image that attempts to end the social stigma for buying SHC.

As a result, a One-Way ANOVA was used to learn about the effects of the dependent variable-willingness to buy SHC. According to the model created and presented above, it was tried to study the impact of the moderators one by one, concluding that alone, moderator "age" and "socioeconomic power" didn't have statistically relevant effects, and none of the pairwise is significant ($p>0.001$), probably because with these specific campaigns neither the age nor the income are strong conditions to influence their decision. But if we consider the "previous experience" variable with ($p<0.001$), the other variables being studied are already statistically significant, and "previous experience" becomes a fixed factor for this analysis. That is, in all cases with the campaigns shown and the control group, the variable indicating whether they have already bought or not is statistically significant. It shows that a person who has already bought SHC, and a person who has not, on the scale used, give different values, meaning that - depending on whether the person has already bought second-hand or not, the effects are different. The analysis was then conducted with the independent variable being the type of campaign that each participant chooses, with the

possibility of not choosing one, and the dependent variable, which is the willingness to buy SHC and past experience as a fixed factor.

We conclude that the results obtained from this analysis are directional and congruent in the direction they take. We will have to interpret the averages differently for those who have already bought and those who have never bought. The results are always higher if the person has previous experience in buying SHC, than if they have never bought, look at any of the images, the results always follow this pattern.

When we analyze those who have already bought second-hand clothes, we conclude that the control group (those who have not seen any of the images) was the one with the highest average, $M=6.00$; $SD=0.310$, and when compared with the control group of those who have no previous experience, the $M= 3.038$ with a significance $p<0.001$. After that one, we see that the highest average observed for those who have previous experience was from the population sample subject to the visual key of low prices, $M=5.438$, $SD=0.387$, when we compare the results of this campaign between people who have or have not bought before, we conclude that the mean is higher for those who have bought before, $M=3.700$, $SD=0.283$. The least impactful campaign, if there was a previous experience, is the focus on treasure hunting, $M=5.190$, $SD=0.338$, this having a negative difference for those with no previous experience, $M=3.409$, $SD=0.330$.

For those who have never purchased SHC before, the most impactful campaign was the low prices campaign, $M=3.7$, $SD=0.283$, followed by the sustainability campaign, $M=3.45$, $SD=0.346$. On the other hand, the one with the least impact was the control group with no campaign, $M=3.038$, $SD=0.304$.

Regarding the most significant mean difference when comparing participants with previous experience or not, it happens in the control group, with past experience $M=6.00$ and without past experience $M=3.038$, with a p -value <0.001 and $F=46.628$, and in the campaign focusing on fighting social stigma, with past experience $M=5.250$, and without past experience $M= 3.10$, with p -value <0.001 and $F=21.035$, meaning that for those who have not yet bought second-hand clothes being visually stimulated by a campaign, or being made aware of the social stigma are the most effective cases, which would result in a greater difference in consumer behavior. The campaign about cheap prices is the one that presents the smallest difference, whether the participant has previous experience or not, which means that whether you have already bought second-hand clothes or not, the focus on "low prices" will be just as effective.

Although the main variable studied was the willingness to buy SHC, participants' willingness to sell second-hand clothes and to buy second-hand luxury items were also asked and measured. These were examined and measured using a 7-point Likert scale, where 1=" no definitely" and 7=" yes definitely". Some pairwise comparisons were made between these two dependent variables and the moderator of "previous experience", and many were not statistically relevant, i.e. with a p -value < 0.001 , so we cannot conclude anything relevant with these data yet.

3.4. QUALITATIVE METHOD – SEMI-STRUCTURED INTERVIEWS – DATA COLLECTION

On the other hand, from the market's point of view, qualitative research was chosen, which makes it possible to have access to more flexible and open results, being semi-structured interviews only the

essential questions were prepared, allowing other topics of conversation and importance for our conclusions to emerge during the conversation. Having both sides of the market represented would be ideal, knowing how the consumer behaves is fundamental, but the retailer's perspective is also necessary for a more complete analysis. Twelve Portuguese brands were contacted, but only had a response and availability from four of them. The criterion for contacting these companies was that they had at least one physical space where they operated, not necessarily a shop, but also a showroom. The intention was to collect primary data through semi-structured interviews (Table 2), due to the pandemic at the time the interviews had to become recorded and noted voice calls.

These interviews had the main purpose of understanding what these brands are doing in their marketing and communication area, how they are communicating with their consumers, and how to reach new ones, in order to answer the first research question “What is currently being done in marketing and communication second-hand businesses in Portugal?” and try to reach conclusions that lead us to possible conclusions for the second one “How does this influence adherence to this type of consumption?”. Although this sample is not large enough to be significant and relevant, it is always additional data that will help the conclusions and will allow know better the Portuguese market of SHC, and the real existing challenges. In table 2 it is possible to have an overview of the main questions that were asked to the interviewees, and which gave rise to the conversations.

The companies contacted were Humana, *Quartier Latin*, *Maudde*, and *Du Chic à Vendre*. Three of the four are second-hand luxury brands, one of them being only bags and wallets, the other only second-hand clothes of all kinds of brands.

Firstly, the companies presented their business model and their way of operating in the market. *Humana* is a non-profit association that works for the protection of the environment through textile reuse and carries out both development cooperation programs in Mozambique and Guinea-Bissau and local support in Portugal. Currently, they have 15 stores for the sale of second-hand goods. Humana has 838 green containers that are spread all over the country and available to citizens and the funds raised are for social projects.

The other three are all in the luxury sector, which may bring slightly different insights from companies selling more standard clothing. However, they are part of the Portuguese second-hand market and are exposed to similar challenges of this industry.

Quartier Latin was the first luxury second-hand shop in Portugal, founded at a time when this type of consumption was very unknown and judged. They select the most loved pieces by their clients and provide a very personalized concomitant with them. The pieces are sold on consignment, for a period of 30 to 60 days. The sale value is defined by the owners of the pieces, but *Quartier* advises from the market perspective, and the last word is the owners. The percentage of profit is shared and can be from 50/50 to 30/70.

Maudde is a premium and luxury second-hand clothes and accessory online store (operates also internationally), currently, they already have a physical space where it is possible to see and try on the pieces, but only by appointment. All goods are owned by private individuals or physical stores that utilize *Maudde* as their online sales channel and were carefully chosen by the two founders.

Finally, the last company interviewed was *Du Chic à Vendre* which has recently changed its concept. It used to be a second-hand clothes store of premium and luxury brands, sold on consignment, a traditional physical shop opens to the public with clothes, wallets, shoes, accessories, vintage and not so vintage pieces, handpicked that were on sale for some time, with no set deadline, rotating depending on the season of the year. After the second confinement they no longer sell clothes, only wallets and bags, the shop became a closed-door shop, working as a showroom, only by appointment, with the expansion of the online presence with a website and social media.

Despite the obvious differences in the different companies, it is possible to see a pattern in the answers given. Regarding the stigma experienced in Portugal about buying second-hand clothes, previously reported through literature, it is something that is felt and confirmed by the people in charge of these companies, however, the older companies report that it was something very present in the past and that over the years there has been a tendency to decrease, especially in the younger generations, in older people it is still felt. About 12 or 10 years ago, there was a lot of prejudgment, but for about 2 years now it has been decreasing a lot. It is also noted by brands that operate in and outside Portugal that can clearly feel the difference, in other European countries, such as France, this type of consumption is quite usual and with little distinction from buying first-hand clothes. Sometimes the problem is not even buying, but admitting they bought something used. When asked an average age range of consumers, it is noticeable a trend within the 25 to 35 years, and in luxury, the range above 40 to 55 is quite incident because luxury requires another type of consumer, usually older and/or with more economic power.

All the companies interviewed operate physically, *Humana* is the only one that does not yet have an online presence but points to this topic as one of its future objectives. However, the fact that they all have physical stores, they all operate differently, at *Maudde* and *Du Chic à Vendre* it is necessary to make an appointment and the space acts as a showroom, which allows for personalized service. In this market, physical stores have very positive impacts because people can see and understand the state and damages of the pieces they are going to buy, and many times this can be the trigger for the consumer's purchase decision.

As the biggest challenges and barriers of the Portuguese market were mentioned several times the big obstacle is still in the consumer, in the perception that they have of the quality and hygiene of the piece, but when they buy it for the first time they are surprised and start to buy frequently; in the awareness of the fashion industry and the importance of reusing and recycling, because there is still a lot of "want to buy what they saw at Zara and in the magazine" thinking, there is still no openness to create their own fashion, which will not be easy to fight until fast fashion presents such competitive prices and new collections all the time.

Regarding the communication of these brands, they all adopt different strategies, *Humana* invests in social media, newsletters, text messages, and the app. On social media, for example, on Instagram most of the communication focuses on low prices, there are also plenty of photos of their shops and articles with shop information, new collections, outfit ideas, and also feedback from satisfied customers. As a future ambition, they want to be ever closer to other media (TVs, radios, newspapers, blogs) and talk about conscious consumption and sustainable fashion.

Quartier Latin reports that at the beginning there was no competition, and then it comes from their customers who had many pieces, and with the business appearing it caught the attention of the

media because they had very premium brands and were contacted by the media, interviews, TV channels, and did not spend money on communication at the beginning and it was a way for them to promote themselves, without having to invest financially. They made themselves known at a stage when they were almost unique in the country with no marketing and communication strategies. Nowadays they have a digital presence, website, Instagram, and Facebook page, where they only put pictures of the items. Derived from the budget, in the future, they want to reach consumers locally and also sell the pieces on more and more luxury marketplaces.

Regarding *Maudde*, they advertise on social networks, and they don't notice much adherence, but most of the posts are photos of the articles available on their platform. They feel a little efficiency when they participate in local flea markets and the founders promote the brand on their pages. According to the founders, they grow slowly, because there is work to do regarding prejudgments, and there is not always a budget for more. As plans for the future in this area will be to maintain and invest in social networks, making some more professional videos sometimes, something dynamic.

Du chic à Vendre at first, it was done marketing and communication campaigns, then they stopped doing them because the second-hand price is much lower, the commission they get from the pieces is not very big and it was difficult to manage the expenses. They consider that it is difficult for luxury goods to do marketing campaigns, so today they are communicating themes such as "this week there is a 10% Gucci wallet campaign" and they consider that the most efficient method is word-of-mouth and Instagram, at this moment they only want to invest on this social network.

All the interviewees agreed that if this market's communication and marketing area grew and was well implemented, there would be a big increase in this type of consumption.

However, some emphasize that they already see changes but the consumer really needs to change in order to reach a normalization of circular fashion and although there is already starting to be more communication, it has to be more aggressive than it has been and it can't be only the responsibility of the stores to make this communication, it should be from all the brands, and fashion magazines rarely make editorials with some second-hand pieces, but not a full outfit of them and "they should introduce these concepts".

4. DISCUSSION

In this study, an important factor was bringing together two perspectives on the current Portuguese market, what was happening on the consumer perception side, and the retailer perspective. The focus was undoubtedly on communication, what was being done in this area and how it was being received.

However, on the consumer's side, it was unanimous that the Portuguese SHC market was underdeveloped, but the companies all report that the biggest problem and challenge they have is how to educate the consumer, stating that a change in behavior and thinking is needed.

Most of the participants knew the SHC concept, even though 7.9% didn't know what it was about. Although for most of them it is not a new concept, more than half of them had never bought any second-hand clothing item, this is a fact that results must be lowered.

Through the sample of participants studied and by the brands interviewed, it was obvious that the majority more willing to participate in this type of consumption is part of Generation Z, the youngest generation that participated in this study, validated hypothesis 4.

Some findings were contradictory, or not clear to conclude a pattern. While the companies and previous researchers (Laitala & Klepp, 2018; S. C. Silva et al., 2021) agree that in Portugal there is still a great social stigma about buying or admitting that one buys secondhand, something that has been improving but is still felt, the majority of the participants did not agree with this statement, not even those who do not want to buy SHC, it can also be understood that "social embarrassment" was the least chosen as the main barrier to buying SHC, however, even if it is not the main one, it may be one of the barriers. Even so, the people who are more willing to buy are the ones who have lower income and the people who are less willing to buy are the ones with higher income, even so, we conclude that H3 is rejected.

These findings indicated that "low prices" are the main motivation for the Portuguese market when buying SHC according to (Farooq Baqal et al., 2018), and hygiene is the main barrier, especially for someone who has never shopped second-hand (S. C. Silva et al., 2021). It was also highlighted that most people prefer to buy in physical shops rather than online, and the hygiene barrier may have some impact on this factor. In the results obtained, most people who had already bought SHC had purchased the product through a "known person", followed by "physical shops". Since hygiene is the biggest barrier to purchase, and the quality of the item is also a significant obstacle, getting to know the person selling, or seeing the piece we are going to buy in person are necessary factors when deciding to purchase. There are many businesses that operate only online, for several advantages, in the second-hand market is not so advisable the online-only sales channel available, but it should be a plus to the physical shop. Even on the retailers' side, it was a highlight that those who started only online and created some kind of physical space, whether it was a shop or a showroom, saw an increase in sales due to the physical space, due to the confidence in the quality of the items, which highlights the importance of the physical shop in a market such as this.

In what concerns the current marketing and communication strategies used by this market it was realized that there is very little done in Portugal, the fact that it is still a market with room for growth ends up not providing the necessary budget for large campaigns in order to exponentially increase the engagement of the Portuguese, however, there is not much focus, for now, on working in this area in the future, other than the continuous investment in social media, but still not with an influencing or engagement strategy. Consumers are aware of this, the results report the lack of advertisements and communication in this market, with the majority saying they have never seen them, especially when talking about physical stores. As mentioned in an interview, today some online platforms for selling clothes have entered with advertising on TV quite frequently, but they are already big companies and not Portuguese. This communication usually focuses only on the selling side, not insisting much on the perks of buying the clothes, perhaps it is a strategy for the Portuguese market because those who are motivated by "low prices" will certainly be driven to make some money when they can and so there may be improvements in consumer behavior because when entering the market just selling their clothes they may realize that it makes sense for them to also buy, but it is not certain or enough educate the behavior of the Portuguese consumer, at least until now. The findings on the existence of advertising and marketing campaigns for physical stores support hypothesis 1, however, participants believe that if the area of communication and marketing were more developed, their interest and engagement would increase greatly. With the results obtained we conclude that most people with experience in buying and/or selling second-hand clothes, knew the concept through social networks by seeing someone doing it, and not through communication from the shops, thus realizing that H2 is correct.

From the market side, everyone agrees that it is only through communication, awareness, and strategic marketing that this industry will be able to grow exponentially, with the constant issue of budget and acceptance. To normalize this type of consumption, other brands should adopt it, even if it means changing their business strategy, which could alter the fact that there are weekly updates in the collections, for example. It is necessary to establish a standard of normality in circular economy in Portugal, since is not in the habit of using used items in their entirety in fashion shoots; there are one or two other pieces that are already used, but it is rare and when it happens it is only one piece.

From the testimony of the brands interviewed, we can also see that the willingness to buy second-hand luxury items is slightly higher than for second-hand items, maybe because luxury goods have better quality and durability, or even because being second-hand makes possible the purchase of those who, for financial reasons, cannot get them firsthand.

On the consumer side, there is a positive response from the majority was seen if a world-renowned brand started a parallel second-hand project, such as a section for reselling used clothes from previous collections. This exponential adherence can be evaluated by the fact that the confidence in the brand with respect to the quality of the article. Another positive aspect of this finding is that most participants reported donating clothes they no longer wear or that no longer fit.

From the questionnaire responses, we would first say that hypothesis 6 was confirmed, as most participants even consider that it would be positively impacted if subjected to a marketing campaign by this market.

But when doing the experiment, where they are subjected to campaigns of different focuses, there are some topics that need to be referenced before drawing conclusions. This study revealed that

having or not having previous experience is a very important and decisive factor. All the people in the study with experience in buying second hand, are more likely to buy again. Therefore, a separation had to be made between people with previous experience and those without. Starting with those already experienced, no additional willingness to buy SHC was noted because they had seen a marketing campaign. The control group, which was not subjected to any campaign, showed the best results, so for these people, the existence of a campaign did not bring incremental increase, and we reject hypothesis 5. The least impactful campaign was the one focusing on treasure hunting, for those with previous experience. When we analyze people with no previous experience, the conclusions change a little and we realize that the campaign with more impact is the one focusing on low prices, and then the one referring to sustainability, and the least impactful was the one with no campaign, i.e. the control group. Thus, confirming hypothesis number 5, and rejecting hypothesis number 6.

When we compared the impacts of the participants with and without previous experience, we noticed that the biggest difference in the impact it had on the participants, was for the control group and in combating social stigma.

5. CONCLUSIONS

5.1. THEORETICAL IMPLICATIONS

The findings of this study contribute to the literature on the SHC market by giving information about the market's current perception and situation in Portugal. Contrary to literature (Harris et al., 2016; S. C. Silva et al., 2021) sustainability and social embarrassment are not the biggest focuses in the decision to buy second-hand clothes. The low prices, hygiene, and quality of the clothes are the main drivers (motivation and barriers respectively) of adherence to this type of consumption.

As shown (LR) the younger generation, at this moment, is the most willing to join this market. However, the consumer sees the Portuguese second-hand market as underdeveloped which may also influence the current type of consumer.

On the consumer side, we conclude that from their perspective there is no association between those with low economic power and those who buy second-hand clothes, however, with those participants, the most willing to buy second-hand clothes are the ones with the lowest income. On the market side, we can notice that there is still no standardization of buying and saying that used goods are bought in Portugal.

The importance of a physical sales space in this sector was highlighted for the reason of giving the consumer "proof" of the current state of the product they are buying, since one of the biggest barriers is quality and hygiene, having direct contact with it, can be the necessary trigger when deciding whether to buy the item. Luxury goods are more likely to be bought by consumers than ordinary goods, perhaps for the perception of greater quality and duration.

Consumers report that they have rarely or never seen an advertisement for a physical second-hand clothes shop and that this may prevent them from being interested in doing so. There are a few occurrences of advertisements but more about online shops. Most people claim that they discovered this market through friends and social networks.

Reconciling the two visions there are some contradictory findings, while the consumer side concludes that the market is not fully developed, the sellers are unanimous that there is a need for a shift in consumer behavior and the normalization of this type of consumption. But both agree that this normalization and development pass almost entirely through the reinforcement and investment in the marketing and communication area.

When trying to understand what the most efficient way would be to move forward in the area of marketing and communication, it has to be identified two perspectives, there is a path and a strategy to follow for those who already have experience in buying second-hand goods and another for those who are pioneers in this sector.

From experience developed, a marketing campaign is more effective for people who have never bought before than for those with previous experience. For those who are not yet consumers in this market, an approach in the campaigns about the reduced prices practiced is necessary. It would also be efficient to focus on sustainability and the environment. It is important to note the business's

benefits to the consumer. However, the campaign on low prices also had an efficient result for consumers with previous experience, so it could be a common strategy.

It is concluded that the least impactful focus for those who have already made a second-hand clothing purchase was on "treasure hunting" and for those with no experience, the least effective outcome was no campaign, which mirrors the importance of doing them. Still, the focus on fighting social stigma and having or not having a campaign are the factors that show the most discrepancy between people with and without previous experience.

5.2. MANAGERIAL IMPLICATIONS

The SHC market has been growing, it is estimated that will continue to do so. As a result, retailers must determine what drives consumers from purchasing SHCs. It is necessary to make the business model known and normalize the consumption of used clothes, as it is easier to encourage a sale to someone who already has previous experience, it is necessary to find ways of creating the curiosity or necessity to doing the first trial on second-hand business. Investing in communication and marketing strategies is crucial

In the Portuguese market, the strategy of referring to low prices, or at least the price difference for unused goods seems to be impactful, reconciling the focus on the environment and sustainability will also be a strategy to follow, however, only this is not enough. We are still in a moment of normalizing this market and introducing it as something not negative or embarrassing. There is more deep work to do, and we cannot just follow the strategies of an ordinary fashion business.

Exploring the introduction of used clothing by known fashion brands could be something interesting to do, they could have a section where they sell pieces from past collections, or even from the new collection but that has already been bought and used by someone. This way, it would be easy to introduce this market as normal and something of trust and quality. The brands already have a known name, the person would enter the shop willingly and end up being confronted with this type of concept, and if they enjoy the experience, it's easier to do it again.

Regarding second-hand brands only, there is a need to reinforce a lot in communication and to outline a long-term marketing strategy. Even if this strategy is maintained only by social networks, as they have been doing, for financial reasons, they must be more dynamic. The creation of workshops about the cycle and impact of a piece of clothing can be something interesting to explore, create a different brand concept closer to the consumers, with workshops, news, and online deliveries only above a specific number of pieces or only by bike, articles on how to avoid pollution, DIY videos to reuse clothes, partnerships with some brands, the creation of a fashion magazine with exclusive looks of used pieces, or the introduction of a portion of used clothes in photo campaigns of brands with first-hand clothes, everything that can motivate experimentation will be essential. After the first purchase, the strategy to be outlined will be less intense and will be helped with word of mouth.

All first-hand clothing brands nowadays should have a box where unused clothes of the same brand can be delivered, to internally use fabric or even the piece as a whole for future collections or sales. The normalization of this consumption does not depend only on who operates in the second-hand market but on the entire fashion market and consumer behavior. Due to budget limits and some social embarrassment in Portugal, traditional brands, i.e. first-hand clothing and fast fashion, should

also normalize this type of consumption because it is something necessary for our planet, i.e. for everyone.

5.3. LIMITATIONS AND FUTURE RESEARCH

In this study there were some limitations, first, the number of people who participated in the study should always be as large as possible to have a more significant sample. On the market side, were also very few brands interviewed, for lack of response or availability of the remaining contacted but it would be interesting to have more significant and wider interviews, and with more data from brands with collections that were not luxury goods. Something limitative was also the presented campaigns, which could be more impactful and evasive, in the sense that only a key visual may not be enough for the desired impact of manipulation in order to have unbiased results, it can be also explored different focuses of the campaign in future research or even the same focus explored in this study, but with another type of approaches, such as video campaigns, or a more extensive and evasive marketing strategy plan. It might also be interesting to understand why the preference in adherence to second-hand clothing consumption if it were a well-known brand rather than a smaller brand that only sells second-hand clothing. A constant and still unanswered challenge is to study what to do to normalize this type of consumption in Portugal.

6. BIBLIOGRAPHY

- Arditi di Castelvetere, S. (2017). *How Second Hand and Vintage purchases affect consumer experience of Fashion & Luxury brands?*
- Aycock, M. (2021). *Consumer Motivations and Perceived Value in Online Second-Hand Luxury Fashion Shopping*. <https://doi.org/10.13140/RG.2.2.29149.33762>
- BCG - Boston Consulting Group, & Altagamma. (2019). *2019 True-Luxury Global Consumer Insight*.
- Belk, R., Fischer Eileen, & v Kozinets, R. (2013). *Qualitative Consumer and Marketing Research*.
- Cervellon, M. C., Carey, L., & Harms, T. (2012). Something old, something used: Determinants of women's purchase of vintage fashion vs second-hand fashion. *International Journal of Retail and Distribution Management*, 40(12), 956–974. <https://doi.org/10.1108/09590551211274946>
- Chu, H., & Liao, S. (2010). Buying while expecting to sell: The economic psychology of online resale. *Journal of Business Research*, 63(9–10), 1073–1078. <https://doi.org/10.1016/j.jbusres.2009.03.023>
- Claudio, L. (2007). Waste Couture: Environmental Impact of the Clothing Industry. *Environmental Health Perspectives*, 115(9). <https://doi.org/10.1289/ehp.115-a449>
- Court, D., Elzinga, D., Mulder, S., & Vetvik Jorgen, O. (n.d.). 1. Mckinsey The consumer decision journey. 2009.
- Elias, M. dos S. (2020). *How to succeed in the second-hand luxury market : the case of Portugal*.
- Farooq Baqal, Yusra and Abdulkhaleq, & Shlair. (2018). Analysis of Factors Influencing the Decisions over Purchasing Second-Hand Products. *International Journal of Social Sciences & Educational Studies*, 4(4). <https://doi.org/10.23918/ijsses.v4i4p80>
- Fernando, A. G., Sivakumaran, B., & Suganthi, L. (2018). Comparison of perceived acquisition value sought by online second-hand and new goods shoppers. *European Journal of Marketing*, 52(7–8). <https://doi.org/10.1108/EJM-01-2017-0048>
- Fletcher, K. (2012). *Sustainable Fashion and Textiles*. Routledge. <https://doi.org/10.4324/9781849772778>
- Gazzola, P., Pavione, E., Pezzetti, R., & Grechi, D. (2020). Trends in the Fashion Industry. The Perception of Sustainability and Circular Economy: A Gender/Generation Quantitative Approach. *Sustainability*, 12(7). <https://doi.org/10.3390/su12072809>
- Geissdoerfer, M., Morioka, S. N., de Carvalho, M. M., & Evans, S. (2018). Business models and supply chains for the circular economy. *Journal of Cleaner Production*, 190, 712–721. <https://doi.org/10.1016/j.jclepro.2018.04.159>
- Gopalakrishnan, S., & Matthews, D. (2018). Collaborative consumption: a business model analysis of second-hand fashion. *Journal of Fashion Marketing and Management*, 22(3). <https://doi.org/10.1108/JFMM-05-2017-0049>

- Harris, F., Roby, H., & Dibb, S. (2016). sustainable clothing: challenges, barriers and interventions for encouraging more sustainable consumer behaviour. *International Journal of Consumer Studies*, 40(3). <https://doi.org/10.1111/ijcs.12257>
- Hur, E., & Cassidy, T. (2019). Perceptions and attitudes towards sustainable fashion design: challenges and opportunities for implementing sustainability in fashion. *International Journal of Fashion Design, Technology and Education*, 12(2). <https://doi.org/10.1080/17543266.2019.1572789>
- Joung, H. M. (2014). Fast-fashion consumers' post-purchase behaviours. *International Journal of Retail and Distribution Management*, 42(8). <https://doi.org/10.1108/IJRDM-03-2013-0055>
- Joy, A., Sherry, J. F., Venkatesh, A., Wang, J., & Chan, R. (2012). Fast fashion, sustainability, and the ethical appeal of luxury brands. *Fashion Theory - Journal of Dress Body and Culture*, 16(3). <https://doi.org/10.2752/175174112X13340749707123>
- Lago Barbosa Ortigão de Oliveira, C. (2014). *Zara: Marketing in Fast Fashion*. <http://edition.cnn.com/BUSINESS/programs/yourbusiness/stories2001/zara/>
- Laitala, K., & Klepp, I. G. (2018). Motivations for and against second-hand clothing acquisition. *Clothing Cultures*, 5(2). https://doi.org/10.1386/cc.5.2.247_1
- Lau, G.-J., Guang, L., Tambunan, A., Caton, P., Estily, R., & Feiyue, L. (2017). *PULSE OF THE FASHION INDUSTRY*. www.copenhagenfashionsummit.com/global-fashion-agenda
- Liao, S., & Chu, H. (2013). Influence of consumer online resale awareness on purchase decisions: A mental accounting perspective. *European Journal of Marketing*, 47(10), 1576–1597. <https://doi.org/10.1108/EJM-12-2010-0665>
- Lo, C. J., Tsarenko, Y., & Tojib, D. (2019). To tell or not to tell? The roles of perceived norms and self-consciousness in understanding consumers' willingness to recommend online secondhand apparel shopping. *Psychology & Marketing*, 36(4). <https://doi.org/10.1002/mar.21179>
- Loetscher, S., Sommerau, C., Switzerland, W., Kreis, B., Ch, M., Häuser, L., Lichnofsky, J., Haake, J., Oettli, D., Wille, S., Gyssler, C., Maechler, T., Graf, M., Gassmann, F., Tobler, M., Liedke, A., Germany, W., Johansson, K., Sweden, W., ... Jeffries, B. (2017). *Changing fashion The clothing and textile industry at the brink of radical transformation* *Changing fashion: The clothing and textile industry at the brink of radical transformation*.
- Machado, M. A. D., Almeida, S. O. de, Bollick, L. C., & Bragagnolo, G. (2019). Second-hand fashion market: consumer role in circular economy. *Journal of Fashion Marketing and Management*, 23(3). <https://doi.org/10.1108/JFMM-07-2018-0099>
- Maria, M., Ferreira, S., & Duarte, M. (2021). *SLOW FASHION OR SELF-SIGNALING? SUSTAINABILITY IN THE FASHION INDUSTRY*.
- McKinsey. (2020). *Is luxury resale the future of fashion?*

- McNeill, L., & Venter, B. (2019). Identity, self-concept and young women's engagement with collaborative, sustainable fashion consumption models. *International Journal of Consumer Studies*, 43(4). <https://doi.org/10.1111/ijcs.12516>
- Mohammad, J., Quoquab, F., & Mohamed Sodom, N. Z. (2020). Mindful consumption of second-hand clothing: the role of eWOM, attitude and consumer engagement. *Journal of Fashion Marketing and Management*. <https://doi.org/10.1108/JFMM-05-2020-0080>
- Moutinho, V., Robalo Rosa, R., Rodrigues, C., & Mendonça, C. (2019, November 29). A pegada da nossa roupa. <https://www.publico.pt/2019/11/29/Infografia/Pegada-Roupa-391>. <https://www.publico.pt/2019/11/29/infografia/pegada-roupa-391>
- Novo consórcio da indústria da moda para a economia circular. (2020, December 23). *Supply Chain Magazine*. <https://www.supplychainmagazine.pt/2020/12/23/novo-consorcio-da-industria-da-moda-para-a-economia-circular/>
- Oliveira, L. (2021, June 4). Só 8% dos portugueses compra frequentemente roupa em 2ª mão. *VISÃO*.
- Ozdamar Ertekin, Z., & Atik, D. (2015). Sustainable Markets: Motivating Factors, Barriers, and Remedies for Mobilization of Slow Fashion. *Journal of Macromarketing*, 35(1). <https://doi.org/10.1177/0276146714535932>
- Park, H., Kwon, T. A., Zaman, M. M., & Song, S. Y. (2020). Thrift shopping for clothes: To treat self or others? *Journal of Global Fashion Marketing*, 11(1). <https://doi.org/10.1080/20932685.2019.1684831>
- Resale report - thred up.* (2021).
- Sarah Willersdorf, F. K. R. E. M. G. and C. M. (2020, October 20). *The Consumers Behind Fashion's Growing Secondhand Market*. <https://www.bcg.com/publications/2020/consumer-segments-behind-growing-secondhand-fashion-market>
- Saraiva dos Anjos, S. (2019). *A comunicação das marcas sustentáveis no universo têxtil. Análise da Comunicação da Marca Insecta Shoes*.
- Schrewentigges, L. (2018). *WHAT IS THE NEXT CHAPTER OF THE FASHION RETAIL INDUSTRY?- STRATEGIC OPTIONS MODEL*.
- Shoham, A., & Brenčič, M. M. (2004). Value, Price Consciousness, and Consumption Frugality. *Journal of International Consumer Marketing*, 17(1), 55–69. https://doi.org/10.1300/J046v17n01_04
- Sihvonen, J., & Turunen, L. L. M. (2016). As good as new – valuing fashion brands in the online second-hand markets. *Journal of Product and Brand Management*, 25(3), 285–295. <https://doi.org/10.1108/JPBM-06-2015-0894>
- Silva, C. (2021, April 29). O luxo em segunda mão dispara: sustentabilidade ou marketing? *Notícias Magazine*. <https://www.noticiasmagazine.pt/2021/o-luxo-em-segunda-mao-dispara-sustentabilidade-ou-marketing/estilos/262139/amp/>

Silva, S. C., Santos, A., Duarte, P., & Vlačić, B. (2021). The role of social embarrassment, sustainability, familiarity and perception of hygiene in second-hand clothing purchase experience. *International Journal of Retail and Distribution Management*, 49(6).
<https://doi.org/10.1108/IJRDM-09-2020-0356>

The Future of Fashion Resale-July 2021. (2021).

Turunen, L. L. M., & Pöyry, E. (2019). Shopping with the resale value in mind: A study on second-hand luxury consumers. *International Journal of Consumer Studies*, 43(6), 549–556.
<https://doi.org/10.1111/ijcs.12539>

UNECE. (2018). *Fashion is an environmental and social emergency, but can also drive progress towards the Sustainable Development Goals*. UNECE.

WEF_Annual_Report_18-19. (n.d.). 2018.

Wischer, N., Manuel, L., & Rodrigues, S. (2020). *ELABORATION ON THE FUTURE ROLE SUSTAINABLE BUSINESS PRACTICES AND TRANSPARENCY WILL PLAY FOR APPAREL COMPANIES*.

7. ANNEXES

Constructs	Measurement	Scale	Adapted from
Willingness to buy SHC	On a scale of 1 to 7 how willing would you be to buy second-hand items (clothes, accessories, and shoes)? - control group	7-point scale: 1 - "definitely no" 7 - "definitely yes"	(Chamberlin & Boks, 2018; Harris et al., 2016; S. C. Silva et al., 2021)
	<i>(Randomly assigned to one of 4 images)</i> After seeing this advertisement, on a scale of 1 to 7 how willing would you be to buy second-hand items (clothes, accessories, and shoes)?		
Manipulation check	Can you describe what you saw in the previous advertisement	text box	attention check
Willingness to buy SH luxury Clothes	Numa escala de 1 a 7 quão disposto estaria a comprar artigos de luxo (roupa, acessórios e calçado) em segunda mão?	7-point scale: 1 - "definitely no" 7 - "definitely yes"	(Elias, 2020)
Willingness to sell SHC	Numa escala de 1 a 7 quão disposto estaria a vender artigos (roupa, acessórios e calçado) em segunda mão?	7-point scale: 1 - "definitely no" 7 - "definitely yes"	(Liao & Chu, 2013)
Familiarization with the concept	do you know the concept of buying and selling second-hand?	1 -yes 2 - no	
Previous experience	Have you ever made a second-hand purchase before?	1 -yes 2 - no	(S. C. Silva et al., 2021)
	Have you ever made a second-hand sale?	1 -yes 2 - no	(Chu & Liao, 2010)
Familiarity of the channels	Where did you buy your second-hand clothes from?	1 - physical stores 2- online stores 3 - marketplace 4 - from a friend/known person 5- other	(S. C. Silva et al., 2021)
Motivation	What was/could be your main motivation for buying second-hand clothes?	1-sustainability 2- low prices 3- the concept of finding an unique item 4-vintage style	(Arditi di Castelvetero, 2017; Elias, 2020)

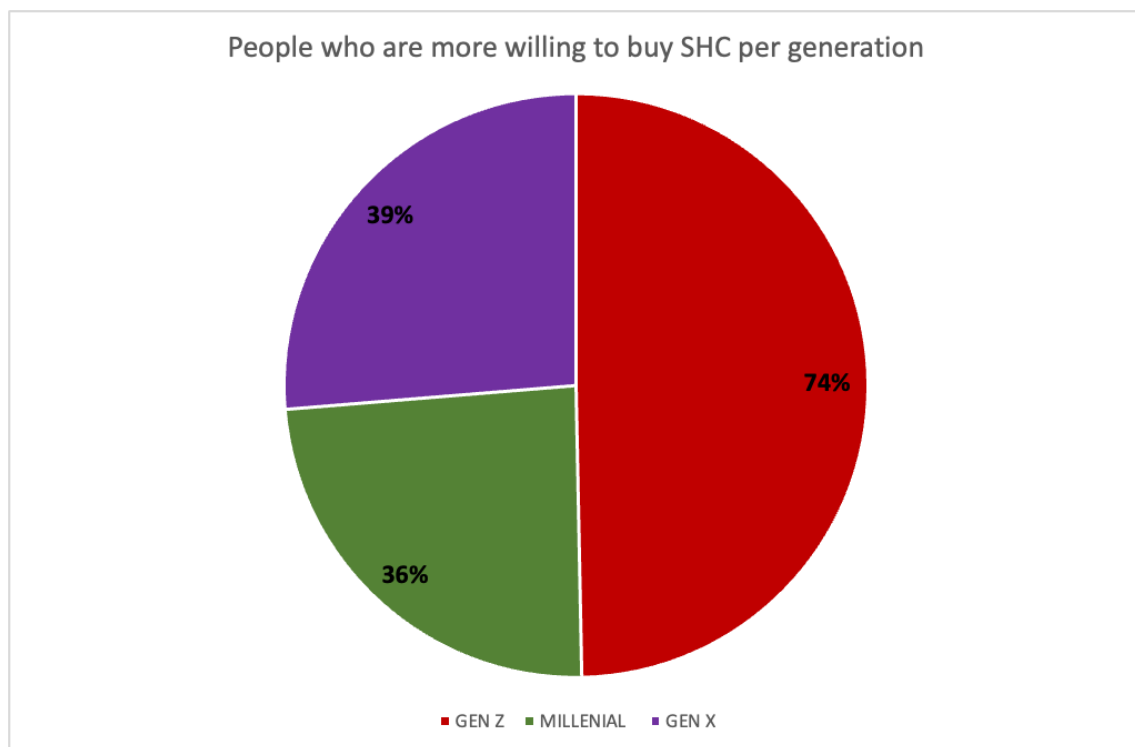
Discovery	How did you discover the business of buying and selling second hand?	1- social media 2- advertising 3-through friends 4-other	
Association with low socioeconomic power	On a scale of 1 to 7 indicate how much you agree or disagree with the following sentence "There is an association between those who buy second-hand clothes and low economic power."	7-point scale: 1 - "definitely no" 7- "definitely yes"	(S. C. Silva et al., 2021)
Barrier	What could be the biggest barrier to buying second-hand clothes?	1 - hygiene 2 - social embarrassment 3 - keeping up fashion trends 4 - unfamiliarity of how and where to do it 5-outro	(S. C. Silva et al., 2021)
Circular economy	What do you do with clothes you no longer wear or don't fit?	1- donations 2- sell them 3- keep them 4- throw them away 5- give them to family and friends 6 - other	(Gullstrand Edbring et al., 2016; Joung, 2014; Moutinho et al., 2019)
Frequency of marketing campaigns - consumers' perceptions	How often do you usually see advertisements and/or marketing campaigns regarding physical second-hand clothes shops?	1 - never 2- aprox 1/month 3- aprox 1/week 4- more than 1/week	(Gopalakrishnan & Matthews, 2018; Lo et al., 2019)
	How often do you see advertisements and/or marketing campaigns for online second-hand clothes shops?		
Impact of the campaigns	On a scale of 1 to 7, how much do you consider that an advertisement and/or communication campaign could have an impact on your decision to buy second-hand clothes?	7-point scale: 1- "no impact" 7- "impact a lot"	(Park et al., 2020)
Unfamiliarity of the channels	on a scale of 1 to 7, how much do you consider that a lack of information about second-hand clothes shops prevents you from being interested in buying?	7-point scale: 1- "no prevent" 7- "prevent a lot"	(S. C. Silva et al., 2021)

Preference of the channel	do you prefer to shop for clothes online or in physical shops?	1- online 2- physical stores 3- no preference	(Elias, 2020)
Perceptions about the portuguese market	On a scale of 1 to 7, please indicate how much you agree or disagree with the following statements: a) "There are no physical second-hand clothes shops in Portugal." b)"The second-hand clothing market, is underdeveloped in Portugal"	7-point scale: 1-"totally disagree" 7- "completely agree"	(Oliveira, 2021)
Reliance on something already known	On a scale of 1 to 7, please indicate how willing you would be to join the second-hand market if a world-renowned clothing brand created a resale section with used items from old collections?	7-point scale: 1 - "definitely no" 7- "definitely yes"	(Park et al., 2020)
Age	Age	text box	
Gender	Gender	1 - female 2 - male 3 - prefer not to say	
Location	City	text box	
Employment situation/employability	1 - student 2- student - worker 3- self - employed 4 - dependent worker 5- unemployed 6- retired 7- other		
Monthly income	1 - 0-600 2- 601 - 1200 3- 1201 - 1800 4- 2401-3000 5- +3000 6. prefer not to say		

Table 1 – Online questionnaire constructs

Business Models	Q1	Could you give a brief description of your business model? How does the brand work?
Challenges - Portuguese Market	Q2	What are the biggest challenges/barriers in order to develop this industry in Portugal? And what can be done to combat them?
	Q3	Do you think that in Portugal there is a social stigma towards buying second-hand objects?
Regarding communication	Q4	Do you do marketing/advertising campaigns? How do you usually attract customers? If YES, when doing the campaigns do you feel/see a growing interest or/and purchase?
	Q5	Do you have any future plans to grow the communication area?
	Q6	Do you think that if the area of communication in this market grew and was well implemented there would be a large increase for this mode of consumption?
	Q7	Do you have an idea of the average age range of your consumers?
	Q8	Physical shop or online shop? Which of the two has more adhesion? Do you have any idea why?

Table 2 – Main questions discussed in semi-structured interviews



Graph 1 – willingness to buy divided by generations

DAR UMA SEGUNDA OPORTUNIDADE À ROUPA



1 CALÇAS DE GANGA = 3800L DE ÁGUA



OU ESPERAR QUE O PLANETA NOS DÊ UMA OPORTUNIDADE A NÓS?

Image 1 – Key visual with focus on sustainability

ROUPA EM SEGUNDA MÃO



POR MENOS, TEM MAIS



PREÇOS REDUZIDOS. QUALIDADE ELEVADA

Image 2 – Key visual with focus on low prices



Image 3 – Key visual with focus on “treasure hunting”



Image 4 – Key visual with focus on breaking the social embarrassment