

# Research on representative brand and operation mode of second-hand clothing in Europe

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**Abstract:** In order to study the current situation and operation mode of second-hand clothing brand in Europe, this paper makes a field investigation on the second-hand clothing shops in European countries. Through classification of the inspected shops, five representative brands with certain popularity and influence and different operation modes in Europe are selected out from high-grade antique boutiques, non-profit charity organizations, professional retailers and middle-grade consignment shops in the second-hand clothing market. This paper analyzes and discusses the development history of stores, the source of goods, the form of stores, and the operation mode, so as to provide a reference for the development and standardization of the second-hand clothing market in China.

**Key words:** Europe, second-hand clothing, brand, operation mode

## 1 Introduction

Second-hand clothing stores in European and American countries originated from charitable cause in the 1950s. Vintage style prevailed from London in the 1960s and then spread to other European and American countries. Vintage clothes presented mainstreaming in the 1970s<sup>[1]</sup>. From clothing industrialization production in last century to the popularity of fast fashion, fast-moving consumption of clothes has imposed heavy burden on ecological environment<sup>[2]</sup>. Issues about sustainable fashion, environment and morality aroused public attention in the 1970s and earned wide recognition from the western society in the 1980s and 1990s<sup>[3-4]</sup>. Concerns over the environment also resulted in consumers' tendency in purchasing second-hand products<sup>[5-7]</sup>. Consumers considered recycle and reuse of clothes as effective method to reduce waste and exert positive influence on the environment<sup>[8]</sup>. As consumers grow interest in environmental fashion and vintage clothing, second-hand and vintage clothing market is growing as well<sup>[9]</sup>. Researches show that the growth rate of second-hand clothing transaction market is ten times than that of other stores<sup>[10]</sup>. Especially in recent years, second-hand clothing market gains increasing attention, direct reuse of abandoned clothes is considered as the best way to extend clothes' life cycle and recycle. In the western world, second-hand clothes have formed a niche market, and the industrial chain of clothing recycle, donation and retail becomes mature gradually.

Based on field investigation on brand stores of second-hand clothing market in Europe, this paper makes differentiation from positioning and concept of vintage degree through classification and comparison, selects representative brands with certain popularity, influence and different operation modes so as to explore types and operation modes of second-hand clothing stores in Europe.

## 2 Concept definition of vintage

There is a popular name of second-hand clothing store, which is vintage store, but vintage here has a concept definition problem. It is divided into antique, vintage and second-hand according to distance of the times. Existing documents have discussed and defined these concepts<sup>[11]</sup>. One recognized definition in the

industry is that antique clothing refers to exquisite clothes with collection value before the 1920s, vintage clothing refers to what from the 1920s to the 1980s, and second-hand clothing refers to clothing after the 1980s.

After making the field investigation on some second-hand clothing stores in Europe, most so-called or self-proclaimed vintages stores mainly sell second-hand clothing. There are few authentic antique and vintage clothing stores. It can be said that stores positioned as second-hand clothing store generally have no antique or vintage clothes, while stores positioned as vintage stores generally have second-hand clothes, most of which sell second-hand clothes. Therefore, this paper could use second-hand store as a universal name instead of vintage store. What needs to explain is that second hand clothing can't necessarily be old or worn clothes, some are bought but never worn or stocked by fashion brand, thus there are brand-new clothes in second-hand clothing stores.

Since there are many second-hand clothing stores in Europe, the size and style of stores are greatly different. Through classification of positioning of stores and operation mode of inspected second-hand clothing brands, it mainly has four types, including high-grade antique boutiques, non-profit charity organizations, professional retailers and middle-grade consignment shops. Middle-grade consignment shops have two operation modes, independent management and factoring.

This paper selects five representative second-hand clothing bands with certain popularity and influence and different operation modes in Europe, and makes exploration from the development history of stores, the source of goods, the form of stores, marketing feature and profit channel.

### 3 Representative brands and operation modes of second-hand clothing in Europe

#### 3.1 A.N.G.E.L.O.

##### 3.1.1 Development history

A.N.G.E.L.O. Vintage Store was founded by Angelo Caroli in his hometown, Lugo in Italy, in 1978. Originally the founder mainly sold second-hand clothes bought from America and those clothes were popular among youths at that time. Then the store collected a growing number of second-hand boutique clothing from all over the world, and the original store was too small to meet the needs of display and exhibition, so the kingdom of vintage clothing store, A.N.G.E.L.O. opened in 1991. It is a magnificent historical building covering an area of 1,400 square meters and mainly sells and collects vintage boutique clothing<sup>[12]</sup>.

A.N.G.E.L.O. also opened its second store in Faenza of Italy and named it A.N.G.E.L.O. Vintage LAB, which sold carefully selected second-hand clothing. Compared with A.N.G.E.L.O. Vintage Palace, this branch is positioned as more pro-people and sells second-hand clothing in recent times or with discount.

##### 3.1.2 The source of goods

Vintage clothing sold by A.N.G.E.L.O. store is collected by Mr. Angelo and buyers from all over the world. At the same time, it also provides acquisition and consignment sales service for customers.

When A.N.G.E.L.O. Store just started in the 1970s, it mainly collected its goods from America by Mr. Angelo. In the following 40 years, vintage clothes collected in the store included world-wide women's wear, men's wear and children's wear, especially those iconic designers' works. It covered military uniform, leisure, sportswear, work clothes, full dress and accessories, etc.

The store provides customers with acquisition and consignment sales service of second-hand clothing. Acquired second-hand clothing includes various kinds of clothes, bags, scarves, glasses and leather shoes, etc., especially vintage fashion accessories with superior quality from famous designers' brands in the last

century. For second-hand clothing after the year of 2000, it is only limited to products by famous designers' brands and only accepts the manner of consignment sales.

### 3.1.3 The form of store

Main stores of A.N.G.E.L.O. include A.N.G.E.L.O. Vintage Palace and A.N.G.E.L.O. Vintage LAB.

A.N.G.E.L.O. Vintage Palace has three floors. The first floor sells second-hand clothes and accessories from the 1960s to 1990s. It sells carefully selected casual wear, sportswear and accessories with different styles as well as recycled fashion items through upgrading. The second floor mainly sells second-hand luxury with brands like Chanel, Hermès, Emilio Pucci and YSL. Furthermore, this floor is equipped with a Party Room for rental of full dress. Most vintage full dresses here come from famous designers and are exquisitely made. They have unique types, including cocktail attire, evening dress, tuxedo and business suit, etc. All party dresses are only for rental. The third floor is Historic Archive and stores the most important designers' representative works in the fashion history covering from the late half of the 19th century to the 1990s. The Archive Room is not open to the public. One should make advance reservation to obtain the permission to get access, and these vintage clothing collections are not for sale and only for rental for creative research, fashion shooting and exhibition. In 2019, A.N.G.E.L.O. is relocating the collection in the Historic Archive to another three-story building next to the Vintage Palace, which is scheduled to be completed in 2020.

A.N.G.E.L.O. Vintage LAB aims to create a lab combining past excellence and present innovation. The store makes series division and display by four areas: Happy Kilo series are charged by weight, and the price is 15EUR per kilo. The Outlet area specially sells second-hand clothes with discount. Vintage of Tomorrow area includes carefully selected second-hand clothes and accessories from contemporary designers and luxury brands in the past decade, which are considered to become boutique vintage in the future. The fourth area displays vintage military uniforms and jeans wear.

### 3.1.4 Marketing feature and profit channel

A.N.G.E.L.O. is positioned as a high-end vintage clothing boutique and enjoys high awareness in the fashion industry in Europe and even in the world. Mr. Angelo is most proud of his Historic Archive, which has more than 150,000 collections and has become an important museum in the fashion history. Figure 1



**Fig.1** Part of the bag collections in A.N.G.E.L.O. Historic Archive.

shows part of the collection of bags in this Archive. This Archive earns income through rental to fashion magazine, film and TV organizations and so on. It has showed its exhibits in more than 100 exhibitions around the world. Customers are from the most significant brand designers and creative studios, the most influential fashion magazines and museums in the world, etc. Most importantly, the class of A.N.G.E.L.O. vintage clothing has been enhanced through this Historic Archive. It also helps to promote its sales of vintage and second-hand clothes in the store, which is the major source of profit of A.N.G.E.L.O.

What's more, A.N.G.E.L.O. also recruits dealers and provides them with their selected vintage and second-hand clothing and accessories, experts team to guide them to complete the integration of product series and store display as well as full set of marketing plans.

### 3.2 Humana

#### 3.2.1 Development history

Humana can be said to be the second-hand clothing store with highest coverage rate in Europe. There are 480 second hand clothing stores in Europe and America and 134 retail and wholesale stores in Africa and Central America<sup>[13]</sup>. Although many people in European countries have seen Humana Second-hand Clothing Store on the street, few people know that Humana is actually a humanism international league, whose full name is Humana People to People. Humana made registration in Switzerland and carries out their projects in 45 countries and regions around the world. For instance, Humana People to People Italy, branch of Humana in Italy, founded in 1998. It has two independent departments, including Humana Scarl, which mainly manages clothing collection service and collects its clothes from 5,000 containers placed in 48 provinces in Italy, and Humana Onlus, which is in charge of recycle and sales of second-hand clothes collected by Humana Scarl and giving support to social benefit project by profit earned from reuse or sales<sup>[14]</sup>.

#### 3.2.2 The source of goods

All second-hand clothes of Humana come from old clothes recycling bins placed in residential areas, streets and garage entrances in different cities in Europe and America. Some recycling bins are even directly placed in the store. People can directly donate their clothes and accessories to the Humana store with no need to make advance appointment. Figure 2 is a clothes recycling bin in the Humana store at Madrid, Spain. People can put their clothes into the bin at any time in business hours. However, Humana



Fig.2 Clothes recycling bin in a Humana store at Madrid, Spain.

is a non-profit charitable organization. Hence, Humana doesn't pay for any second-hand clothes or accessories, and all sales revenue is used for the implementation of international public welfare project.

### 3.2.3 The form of store

Humana store is mainly divided into Humana Vintage and Humana Second Hand and generally has clear signs in conspicuous positions outside of the store. It can be seen from its names that it has the category of middle-class vintage and ordinary second-hand category based on age, brand, quality and degree of new and old. Commonly speaking, it sells both men's wear and women's wear in a store. The store has sufficient types of goods and mainly sells ordinary brand clothes. It puts clothes on different shelves based on categories, including shirt, dress, coat, pants and knitwear and so forth, and its accessories based on bags, shoes and scarves for customers. Some stores also have plenty of second hand linen curtains, beddings and crochet tablecloths in the second floor or the underground floor for display and sales. The store has all kinds of second-hand clothes and accessories, which have been well sterilized, arranged and ironed. All clothes and accessories for sales have Humana brand tags with specific price.

### 3.2.4 Marketing feature and profit channel

Since all second-hand clothes and accessories of Humana are collected from recycling bins with no cost, and all costs arise from sorting, transportation, manual work, sterilization and arrangement, second-hand clothes and accessories in the store are sold at low prices. Humana in Europe adheres to the principle of localization priority in treatment of old clothes. For instance, Humana has a dozen of second-hand stores in Vienna. They sell some clothes in Vienna, and the rest clothes with good quality will be exported to Africa and others are recycled as industrial raw materials. The rest materials with no value of reuse will be used as the source of burning fuel of garbage heat power station. These measures guarantee full-process reuse of old clothes and realize zero waste.

Humana People to People has provided huge financial support for the implementation of international public welfare activities through collection and sales of second-hand clothes, which is also helpful to fight against the destructive influence of global warming and climate change. Nearly 20 million people in Europe and North America donate their used clothes to clothes recycling bins of Humana People to People and 10 million people buy those clothes and realize reuse of the clothes. These recycled second-hand clothes provide fund for social development project and reduce carbon emission<sup>[13]</sup>.

## 3.3 Kilo shop

### 3.3.1 Development history

Founded in the 1980s in Paris, Kilo Shop is an international chain store selling second-hand clothes and providing stocked and vintage clothing. It has 25 retail stores in France and opens franchise stores respectively in Athens, Amsterdam and Tokyo<sup>[15]</sup>. Kilo Shop is a part of Eureka Fripe Group, which was founded by a vintage clothing fan Bernard Graf in 1974 and is currently the world's largest second-hand clothing wholesaler. Eureka Fripe Group sets its headquarters in Rouen, France. It owns a warehousing system covering an area of 24,000 square meters and more than 10 million second-hand clothes and accessories<sup>[16]</sup>.

### 3.3.2 The source of goods

Kilo Shop does not directly accept second-hand clothes sold or donated by customers. All second-hand clothes sold in Kilo Shop come from Eureka Fripe Group and are supplied by the Headquarter in Paris. There are about 30 tons of second-hand clothes and brand-new clothes and accessories in stock delivered

to the group warehouse by purchasers every week. These second-hand clothes and accessories come from different countries and regions of Europe, Asia and America and other places. Professional sorters will sort out these second-hand clothes based on different trends and customer demands and pick out clothes with better quality for second sales, and some clothes will be upgraded. Eureka Fripe has a warehousing capacity of 8 to 9 million goods, making them able to meet different consumers' demand in different seasons and trends.

### 3.3.3 The form of store

All goods of Kilo Shop direct-sale stores and franchise stores are chosen by relevant experts from Eureka Fripe Group Headquarters who also offer guidance in store decoration, display and operation. Hence, Kilo Shop has intense vintage style and rich goods. Kilo Shop mainly open around main streets with more people in downtown. Kilo Shop are also popular on streets with a large number of visitors. Two Kilo Shop in Paris enjoy high awareness in local vintage stores. Many local students as well as youths and visitors pursuing new and different clothing styles will come here to shop.

Since second-hand clothes of Kilo Shop come from different places around the world, they have varied categories and styles such as Japanese kimono, American baseball jacket, second-hand Levi's, Lee & Wrangler high-waist jeans, 1980s jacket, 1950s pajama, cocktail dress, beachwear, fur clothing, cap, sneakers, backpack and scarf. There are many clothes on shelves, and boutique styles will be hung on the wall alone. Furthermore, it also has a great many of vintage posters, models and ornaments to create rich vintage atmosphere and to easily attract consumers.

### 3.3.4 Marketing feature and profit channel

Pricing by weighing by the kilo is the most important sales feature of Kilo Shop. "Kilo" also refers to kilo. All clothes and accessories sold in the store are divided into two parts. One part of clothes and accessories have individual tags with prices, and the other part has no individual price. Customers can find corresponding weighing price from colors of plastic anti-theft clasps on clothes (shown as Fig.3). For instance, clothes with red anti-theft clasp are sold by 20EUR/kilo, clothes with green anti-theft clasp are



**Fig.3** The colorful anti-theft clasps for weighing and pricing second-hand clothes of Kilo Shop.

sold by 30EUR/kilo, clothes with blue anti-theft clasp are sold by 40EUR/kilo, clothes with orange anti-theft clasp are sold by 60EUR/kilo. Customers can find scales in conspicuous positions and can weigh and assess the price on their own.

Kilo Shop generally has big size and guarantees about 16,000 clothes and accessories for daily sales. Besides, the store will have new arrivals in every two days. The shopping manner of pricing by weighing is fresh to customers, and sufficient supply and update speed help it maintain high popularity and turnover and eventually achieve high profit amount.

Eureka Fripe Group classifies other second-hand clothing that are not sold in Kilo Shop and upcycled materials and unwearable clothes. It has established two vintage clothing boutiques, Culture Vintage and Kiliwatch Collect.Or. They manufacture and sell clothes in France, and the rest will be packed and sold to more than 90 countries around the world.

### 3.4 ROSier41

#### 3.4.1 Development history

ROsier41 is a "cutting-edge and independent" second-hand clothing store founded in 2011. It is located in a quiet street in downtown of Antwerp, Belgium and jointly operated by the owner Paul and Viviane and does not have branches. However, ROSier41 enjoys great awareness in Antwerp and everyone who pursues fashion knows this store, and many people will come to the store purposely.

#### 3.4.2 The source of goods

ROsier41 sells a small amount of brand-new seasonal products, stocked products and second-hand clothes and accessories. It focuses on the sales of second-hand clothes and accessories, and all come from famous fashion brands or designers' brands, especially from designers of Belgium, e.g. Dries Van Noten, Ann Demeulemeester, Maison Martin Margiela and Raf Simons and some international fashion brands such as Jil Sander, Dior, Marni, Chloé, Rick Owens, Balenciaga, Comme des Garçons and Yohji Yamamoto.

All clothes and accessories sold here are purchased by the owner or consigned for sale by customers. They are carefully picked by the owner and no damaged second-hand clothes or clothes with no brands can be found here. Customers can bring clothes and accessories they want to sell here and negotiate the price, but they must be designers' works with superior quality<sup>[17]</sup>.

#### 3.4.3 The form of store

ROsier41 Store covers an area of 150 square meters and is carefully taken care by the owner. It can best show the owner's taste. Since all clothes and accessories sold here come from famous designers and fashion brands, the biggest feature of store display is that it distinguishes clothes and accessories with different brands by special signs. Inspired by the initial letter R of ROSier41, the owner designs a division plate that can hang up on the portal frame and marks different fashion brands on the division plate and makes centralized display of all clothes and accessories by brands, as shown in Figure 4. There are special glass-frame cabinets and shoe racks for sunglasses, jewelries and shoes in an exquisite manner.

#### 3.4.4 Marketing feature and profit channel

Although ROSier41 mainly sells second-hand clothes and accessories, it is greatly different from above-mentioned vintage clothing stores. It gives an impression of young, cutting-edge and fashion and all goods are from designers' works in recent ages. Although there are a number of clothing brands from different European and American countries, Belgian fashion designers' works are in the majority from the quantity of clothes and accessories. The owner displays Belgian brands like Dries Van Noten, Ann De-



Fig.4 The "R" division plate of ROsier41.

meulemeester and Maison Martin Margiela on the portal frame at the entrance of the store on purpose. New seasonal brand products in the store generally come from Belgian brands. It is just a small amount of them, but they become embellishments, making clothes and accessories in the store present vanguard and fashionable atmosphere.

The store has special show window for young talented designers and reserved for graduates from Royal Academy of Fine Arts Antwerp. It displays latest design works of young designers throughout the year, which not only provides designers with display space, but also makes the store more attractive.

Since goods of ROsier41 are purchased or consigned for sale, it seeks its main profit from sales price difference and consignment commission. Clothes and accessories sold here stress fashion and seasonal change, so they are usually sold quickly and have large fluidity, and the owner will update almost every day.

### 3.5 Filippa K Second Hand

#### 3.5.1 Development history

Completely different from above-mentioned second-hand clothing stores, Filippa K Second Hand is not a brand specially for second-hand clothes but adopts a recycle mode of brand clothes explored by Filippa K, a Swedish fashion brand.

Founded by Ms Filippa Knutsson in 1993, Filippa K is currently one of the largest fashion design companies in Sweden. It attaches great importance to the sustainable commercial concept and is a member of Fair Wear Foundation. It worked with Judits Second Hand, a second-hand clothing brand in Sweden, in 2008 and founded Filippa K Second Hand. Filippa K Second Hand is fully operated by Judit, who is responsible for store operation, recycle and sales of clothes and daily matters.

#### 3.5.2 The source of goods

Filippa K Second Hand specially recycles second-hand clothes of Filippa K brand, including women's wear and men's wear, and sells unused clothes and accessories of the brand as well. The recycling form mainly provides customers with consignment service and enables customers to bring their unneeded and unused Filippa K clothes and accessories to the store after cleaning. Store staff will assess the price of clothes and accessories provided by customers and sell in the store. They will be sold in a month. If the consigned goods are sold, customers can get 40% of the payment. If they are not sold in a month, cus-

tomers can take back their clothes or ask the store to donate to charitable organizations<sup>[18]</sup>. This one-month sales form can keep the goods fresh and increase customers' interest in being regular customers.

### 3.5.3 The form of store

Filippa K Second Hand is in small size and does not maintain consistency with regular stores of Filippa K purposely, but it keeps its overall display clean and elegant, creating a pleasant shopping environment for customers. Filippa K Second Hand is a neighbor to Judits Second Hand and is located in the same street of Stockholm. Since Filippa K Second Hand is run by Judits, the operation mode, consignment rules and official website are consistent with that of Judits Second Hand.

### 3.5.4 Marketing feature and profit channel

Filippa K Second Hand gets 60% of the sale for single piece as commission by offering consignment service for customers. Apparently, Filippa K Second Hand is not the major source of profit of Filippa K. It is mainly an innovative practice of enterprise's social obligation. From providing customers with consignment and donation service, it achieves the goal of prolonging the life cycle of this brand and reduces the burden on environment. It provides a reference model for the sustainable development of fashion brands by entrusting third-party recycle and sales of the brand's second-hand clothes and sample clothes.

## 4 Conclusion

(1) From the perspective of development history: some European vintage fans have started to explore the sales pattern of second-hand clothes wholesale or retail since the 1970s. Europe has developed mature industrial chain to conduct international wholesale and retail business, e.g. Eureka Fripe Group of Kilo Shop and the Italian vintage clothing boutique A.N.G.E.L.O. In recent ten years to 20 years, with the rise of vintage stores in Europe, there are more and more personalized vintage stores highlighting the owner personal taste and local characteristics and clothing brands with social obligation starting to explore a new mode of recycle and reuse of brand clothing.

(2) From the perspective of the source of goods, middle and high-class vintage clothing boutiques generally adopt the manner of direct procurement by the owner or buyers and consignment for sale. Those consigned second-hand clothes are limited to luxury and designers' brand. Middle and low-class second-hand clothing stores generally collect their clothes and accessories from clothes recycling bins or other recycle channels. Besides, brand clothes in stock are also a source of goods for vintage stores.

(3) From the perspective of the form of store: all inspected European second-hand clothing stores focus on the creation of vintage atmosphere and have sufficient types of goods. It displays by portal frame and area display based on categories of clothing. Second-hand clothing brands with abundant supply make classification of their goods by high, middle and low class and sell in different stores so that customers can choose with clear target, e.g. HUMANA Vintage, HUMANA Second Hand, A.N.G.E.L.O. Vintage Palace and A.N.G.E.L.O. Vintage LAB. Second-hand brand stores in smaller size will apply visualized signs miraculously, making the classification of goods clearer, e.g. "R" division plate of ROSIER<sup>41</sup> store.

(4) From the perspective of operation mode: second-hand clothing brands with different positioning of high, middle and low class explore a suitable development mode, respectively. High-end vintage stores adopt the boutique mode, set up fashion achieve and promote second-hand sales through high-end lease. Middle-class consignment stores adopt the personalized and characteristic model, stick to localization advantage and lay emphasis on second-hand brand goods with regional advantages as well as recycle of self-owned brand. Low-end second-hand retailers and charitable organizations adopt the international whole-

sale mode, establish mature industrial chain and achieve benefit maximization through international network.

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