

## My wardrobe in the cloud – an international comparison of fashion rental

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### INTRODUCTION

The 21<sup>st</sup> century is shaped not only by new technological interventions, but also by various events that have had dramatic impacts on people and their livelihoods. These have had a particular impact on the fashion industry and how people consume. Examples of such transformative events prior to the COVID-19 pandemic include the 2008 global financial crisis (Davidson et al., 2018; Brydges et al., 2020), which saw the emergence of disruptive business model innovations such as renting and swapping (Mukendi & Henninger, 2020; Brydges et al., 2020). With consumers being left with less disposable income to spend on luxury and/or unnecessary items, yet still keen on taming their fashion appetite, fashion entrepreneurs have developed disruptive innovations, such as swap parties and rental services for every day, casual, and work wear, in order to fill this gap in the market (Armstrong et al., 2015; Henninger et al., 2019). These innovations are an extension of a market which primarily focused on occasion and/or bridal wear (Conlon, 2020). In line with technological transformations, we have seen a shift from bricks-and-mortar stores towards e-commerce in the first instance, which has since developed into m- and s-commerce with the development of Web 2.0. Consumers, especially those part of Generations Y (born between 1981 and 1996) and Z (born between 1997 and 2012) are technology savvy, self-confident, and show a positive attitude towards sustainability (Rogers, 2013; Valentine & Powers, 2013). Moreover, Generation Z consumers are so called digital natives, as opposed to nomads, seeing as they have grown up with the internet, and therefore are not only comfortable in navigating online platforms, but also feel at ease in the cyber world (Francis & Hoefel, 2018). Combined Generations Y and Z make up approximately 40% of all consumers globally and as such have the power to enforce change (Amed et al., 2019). They have been described as ‘woke’ consumers, who easily identify injustices and are not afraid to act upon these and as such are likely to engage in new modes of consumption, including renting of fashion garments, if these are seen to fit with their worldview and values of being more sustainable than their counterparts (Amed et al., 2019).

Similarly, one of the biggest and most dramatic factory accidents (Rana Plaza), in which thousands lost their lives (Parveen, 2014), as well as the most recent COVID-19 pandemic (McIntosh, 2020; McKinsey, 2020), have shifted consumer attitudes towards more ‘sustainable’ modes of acquisition. With these events and more, consumers are increasingly aware of the impact their purchase decisions have on the natural and social environment (WRAP, 2020 a, b; Brydges & Hanlon, 2020). While this could lead to the assumption that disruptive business model innovations are on the rise again (Brydges et al., 2020b), unlike in the financial crisis in 2008, the COVID-19 pandemic has left these fashion entrepreneurs struggling, with some platforms having to close their business for good. Yet, there is hope, seeing as the UN has established the UN Alliance for sustainable fashion as well as developed the SDG (Sustainable Development Goal) for better fashion, both of which emphasise the need for change (UN, 2020, 2021). With sustainability being a top global priority and the reduction of fashion waste as well as the increased use of garments becoming focal points in the industry, we may see another uprise of fashion rental platforms in the near future.

The purpose of this chapter is to explore how entrepreneurs that have set up these fashion rental platforms deal with the challenges they face in the 21<sup>st</sup> century, focusing on increased technological developments and external pressures (e.g. COVID-19). Thus, this chapter seeks to address the following research questions:

- 1) Why are some online fashion rental platforms struggling whilst others are accelerating?
- 2) Are fashion rentals more sustainable alternatives?

### 3) How could rental platform entrepreneurs better communicate their unique selling points (USP)?

There is a need to investigate disruptive business model innovations and more specifically rental platforms from an interdisciplinary perspective, thereby understanding what these unique selling points (USPs) are and how they can be communicated to the rental platforms' target audiences, as well as understanding the challenges that are faced by these rental platform entrepreneurs. This gap is addressed in this chapter through an international comparison, by drawing on empirical evidence from qualitative interviews and quantitative analysis based on life cycle assessments (LCA).

## BACKGROUND

### Disruptive Business Model Innovations And The Fashion Industry

As aforementioned, the 21<sup>st</sup> century has seen the emergence of disruptive business model innovations (Mukendi & Henninger, 2020; Brydges et al., 2020), including online fashion rental platforms, which are the focus of this chapter. While on the one hand, disruptive innovations are often seen to be inferior compared to their mainstream counterparts (e.g., lower quality, locations away from tourist hotspots) (Christensen et al., 2015), they also often provide alternative benefits that can attract consumers (e.g., Markides, 2006), such as cheaper price points, more convenient locations (e.g., in local areas), and/or access to products and/or services that would otherwise be unattainable (e.g., luxury goods). Generally, disruptive innovations capitalise on utilising products and/or services that are otherwise seen as idle, and thus they have a potential to maximise their practical service life (Zamani et al., 2017; Amasawa et al., 2020).

Whereas the tourism and transportation sectors have brought forward the most prominent examples associated with the sharing economy, with Airbnb and Zipcar respectively, in recent years, disruptive innovations have entered the fashion industry in the form of collaborative (e.g. swapping, sharing) and access based consumption business models (e.g., renting) (Armstrong et al., 2015; Becker-Leifhold & Iran, 2018; Henninger et al., 2019; Iran et al., 2019; Brydges et al., 2020; Mukendi and Henninger, 2020). Although there are many different definitions and interpretations of business models for the sharing economy, we utilise the sharing economy as an umbrella term that encompasses consumer participation (Fitzsimmons, 1985), product-service systems (PSS) (Mont, 2002), collaborative consumption (Botsman & Rogers, 2010), and access based consumption (ABC) (Bardhi & Eckhardt, 2012) and their subsequent practices, including, but not limited to renting, borrowing, lending, swapping, secondhand shopping, exchanging, or gifting (Dreyer et al., 2017).

In this research, we are particularly interested in fashion rental platforms. Breaking the rules of the dominating mainstream business practices which follow a model of 'take-make-use-dispose' (exemplified by disposable or fast fashion), fashion rental platforms aim to increase clothing utilisation by providing on-demand access to a range of garments, from work wear to party dresses, with potentially positive environmental impacts (Iran & Schrader, 2017). As indicated, the renting model has gained popularity since 2008, with millions of users engaging with these types of services, thereby 'disrupting' the conventional way of consuming garments (Botsman & Rodgers, 2010). Thus, rather than purchasing garments firsthand, consumers are making use of idle capacities, which can have societal, economic, and environmental implications. To explain, utilising garments more often and for longer, which could be assumed if garments are rented, can reduce the carbon footprint they have over a lifetime (WRAP, 2020a, b), especially if the garments are worn more than one time before laundering them. Moreover, being able to access garments implies that consumers can show a sense of belonging, and thus may impact their well-being (e.g., McNeil & Venter, 2019; Alevizou et al., 2021), whilst renting is also often perceived to be a cheaper alternative to purchasing, at least in the short run, whilst at the same time it can reduce risks of ownership (Hu et al., 2018). Some of the positive and negative impacts on the social, natural, and economic environment are listed in Table 1. These impacts have predominantly been established through research conducted in the tourism and transportation industry, thus, there is not only a lack to investigate this further within the fashion rental context, but it is also questionable whether

all aspects apply to the fashion rental context (e.g., Park & Armstrong, 2017; Schor & Attwood-Charles, 2017; Henninger et al., 2019; Brydges et al., 2020).

*Table 1. Summary of key positive and negative impacts on the social, natural, and economic environment*

<b>Environment</b>	<b>Positive</b>	<b>Negative</b>	<b>References</b>
Social	<ul style="list-style-type: none"> <li>• Access to otherwise unattainable garments</li> <li>• Enhanced well-being, as rented garments may allow access to social groupings</li> <li>• Perceived inclusivity</li> <li>• Creation of communities</li> </ul>	<ul style="list-style-type: none"> <li>• Labour law issues, e.g. gig economy, lack of pay</li> <li>• Exclusion due to stigma</li> <li>• Perceived health risk (e.g. hygiene)</li> </ul>	Schor & Attwood-Charles, 2017, Henninger et al., 2019
Natural	<ul style="list-style-type: none"> <li>• Incentivise platforms to increase utilisation of garments and extend service lifetime</li> <li>• Less raw materials used if products are circulated and used longer</li> </ul>	<ul style="list-style-type: none"> <li>• Reliance on dry cleaning implies increased use of chemicals</li> <li>• Reduced material longevity due to aftercare</li> <li>• Increased CO2 emissions due to transportation and laundry</li> </ul>	Park & Armstrong, 2017; Henninger et al., 2019, Brydges et al., 2020
Economic	<ul style="list-style-type: none"> <li>• Creation of new jobs</li> <li>• Ability for individuals to earn money on idle capacities</li> </ul>	<ul style="list-style-type: none"> <li>• Tax aversions by larger companies (researched in tourism and transportation industry)</li> <li>• Loss of jobs along the supply chain</li> </ul>	Schor & Attwood-Charles, 2017

*Source: (authors' own)*

What becomes apparent here is that rental businesses, including fashion rentals, have been enabled through the development of Web 2.0 and more specifically e-commerce, which have enhanced the accessibility and creation of these web platforms to facilitate access to idle capacities on a wider scale (Armstrong et al., 2016; Becker-Leifhold & Iran, 2018; McNeil & Venter, 2019). Thus, it may not be surprising that more recent definitions of the sharing economy, and more specifically access based consumption incorporate an online angle, even though not all rental businesses are pure-play online retailers (Binninger et al, 2015; Petersen & Riisberg, 2017; Camacho-Otero et al., 2019; Norup et al., 2019). Although the terminological debate on whether or not the definition should be focused on only online or incorporate both an online and offline angle is beyond the scope of this chapter, it is vital to raise this point, when investigating why some rental platform entrepreneurs are struggling to survive in the 21<sup>st</sup> century, whilst others are thriving.

Within the renting remit we distinguish between two different types of operations (e.g. Armstrong et al., 2016; Becker-Leifhold & Iran, 2018; McNeil & Venter, 2019). The first option is business-to-consumer (B2C), which exists both within an offline context, meaning a physical store (e.g. MossBros UK) or via online platforms, for examples Rent The Runway (USA), Girl Meets Dress (UK), or GlamCorner (Australia) (Amed et al., 2019; Lieber, 2020). Whether offline or online, this business model offers either short-term rentals or longer-term leasing. In either instance, consumers pay a set fee for their rental/subscription, which allows them access to a set amount of items over a certain amount

of time (e.g. Hu et al, 2018; Mukendi & Henninger, 2020; Brydges et al., 2020). In case of consumers being unsatisfied with the garments received, these organisations allow for exchanges or refunds to happen, based on their company policy.

Girl Meets Dress (UK) for example facilitates refunds “if none of them (clothing items) are suitable and you require a full refund you have 24 hours to post the box back to us from your local Post Office” (GirlMeetsDress, n.d.). Rent The Runway has previously offered an ‘Unlimited Swaps’ option, highlighting that consumers can “style, wear, and hold onto your items for as long as you’d like. Whenever you're done wearing something, send it back and open up a spot for something new” (RentTheRunway, n.d.). It has to be noted that this option will be retiring soon, according to the official website. A potential explanation here could be feasibility of not only facilitating these continuous swaps in terms of the infrastructure, but also in economic and environmental terms, as continuous dry cleaning can not only be costly for the organisation, but also negatively impact the garment’s durability and thus, ability to rent it out over longer periods of time. Moreover, if there is no actual time limit on how long people can keep hold of these items, there may be an issue in terms of overall availability, as other consumers may feel they miss out on the opportunity to rent this item. From a consumer perspective a key advantage of the B2C rental model is the fact that one organisation is responsible for the garments and thus, for the cleaning and maintenance as well as the logistics of delivering the items and gaining them back. As such, they could be seen as ‘one-stop-shops’ that follow rules and regulations clearly stated on the company websites.

Peer-to-Peer (P2P) is the second type of operation, which is facilitated through online platforms by third party providers. Similarly, to the B2C context consumers can access garments and accessories, yet rather than being provided by an organisation, fellow customers become ‘providers’ and thus, can rent out their personal idle capacities (e.g. Philip et al., 2015; 2019; Henninger et al., 2019) and make money at the same time. An example here would be the New York City based StyleLend platform or My Wardrobe HQ in the UK. Similarly, to the B2C rentals, the P2P rentals also have a return policy that indicates “if an item that you have ordered doesn't fit, you have 24 hours to get in touch with our customer services (...) and return your item to us. We will be happy to refund the rental fee/purchase price of any unworn items as long as the security tags are still attached” (MyWardrobeHQ, 2021). Although returns policies, aftercare cleaning guarantees, and rental insurances are offered on these P2P rental websites, consumers have previously indicated that they may trust a company (B2C) more when it comes to concerns relating to hygiene (e.g. Hu et al., 2018). This is noteworthy, as from looking at the websites there does not seem to be a difference between B2C and P2P, as both cover returns, aftercare, and ‘what if’ questions, yet it seems that simply the association of a garment belonging to an individual rather than an entity can have key implications for the service provide, which we will return to later on in this chapter.

One of the reasons as to why the sharing economy and specifically rental platforms may have gained popularity up until 2019, is the fact that consumers become increasingly environmentally conscious (Henninger et al., 2016; WEFForum, 2021) and are aware of the impact their fashion consumption practices have on the natural and social environment. This has been amplified with the emergence of social media, in that consumers now have access to information not only 24/7, but also instantaneously, which implies that companies can no longer hide, and mistakes are uncovered and broadcasted to a wide audience, spreading almost like a wildfire. The COVID-19 pandemic has further enhanced the environmental consciousness of people, and also led to decluttering actions, in that people have started to part from their clothing possessions (WRAP, 2020a, b; Deloitte, 2021). A McKinsey survey found that 20% of customers want to reduce their clothing consumption post-pandemic, and furthermore 71% of customers are interested in participating in fashion business models that offer rental, resale, and refurbishment (Ellen MacArthur Foundation, 2020). Secondhand resale platforms seem to start booming, with people selling their ‘clutter’ online, whilst rental platforms, including Rent The Runway, Le Tote, and Gwynnie Bee, are struggling to keep afloat, thereby furloughing people and/or in a worst-case scenario having to close down their operations (e.g. Armarium, Le Tote) (Brydges et al., 2020; Chua, 2020; Dua, 2020). Moreover, there are health concerns as to whether it remains safe to continue renting (Murray, 2021), even though rental companies try to reassure their community that they are taking all measures they can to protect their clients. For example, GlamCorner (2020) states “we have worked closely with our team to ensure we are upholding the highest safety and hygiene standards across our operation while fulfilling your orders”. They indicate that they are providing hand sanitisers

and facemasks to their workforce, whilst at the same time ensure that their garments are disinfected. Although there are voices of concern raised, especially in terms of hygiene, Conlon (2020) reports the opposite, in that especially P2P renting seems to see an increased uptake during the 2020 pandemic. My Wardrobe UK, for example, “saw a 50% increase in stock listed by brands and private lenders” (Conlon, 2020). Perhaps an explanation that can be given here is the fact that P2P platforms are a way for people to capitalise on their idle capacities, in that they gain a certain percentage of the rental/leasing fee and/or have the opportunity to sell these, if an offer is made. These P2P platforms advertise themselves as being “determined to transform the way we consume fashion, By Rotation empowers you to do good for your wardrobe, your wallet and planet at the same time” (ByRotation, 2021), thereby making themselves attractive not only to those, who want to earn money, but also conscious consumers that are increasingly on the rise, especially since the COVID-19 pandemic.

We want to take a moment to reflect on this contradiction, which is seemingly an oxymoron: fashion rental platforms have emerged and mushroomed out of nowhere since the 2008 credit crisis, as such they are a crisis phenomenon, and should theoretically speaking, be equipped to deal with uncertainties in the market environment, such as is currently seen in the COVID-19 pandemic. Yet, this does not seem to be the case, but rather they seem to be struggling to keep afloat, especially B2C platforms. An explanation could be that people have less occasions to go out and dress up, seeing as curfews and social distancing regulations prohibit social gatherings and events. Similarly, new fashion trends, such as the ‘slob style’ imply that people no longer look for skirts or smart pants (Ferrier, 2020), but rather focus more on shirts, blouses, and accessories, as only the upper part of the body can be seen in our now Zoom and Teams society. A further noteworthy observation is the fact that resale platforms such as eBay, Depop, or TreadUp are booming, as well as those rental platforms that have a P2P focus. So why not B2C rentals? Is the answer as simple as to say – finances? In that B2C are dependent on regular income, whilst P2P rentals are just providing an extra bit of cash for private individuals? This however would pose the argument that P2P rental platform providers are also business entities, thus there may not necessarily be a big difference between B2C and P2P. We will address this further throughout the chapter.

## **DATA BACKGROUND**

As indicated in the introduction section, this chapter seeks to address three key questions, in that it focuses on why some online rental platforms are struggling, whilst other accelerate; whether (or nor) these fashion rentals are actual sustainable alternatives; and how these rental platform entrepreneurs can communicate their unique selling points more. Seeing as the fashion industry has been scrutinised for their unsustainable practices and there is an increased priority on sustainability (UN, 2020, 2021), this chapter provides insights into phenomenon that has gained increased attention in recent years (Brydges et al., 2020; Mukendi & Henninger, 2020). This chapter contributes to knowledge by providing insights into the three questions posed, which will further practically contribute by providing recommendations that can be taken forward by practitioners in order to compete in a highly volatile market.

These insights are provided and addressed through a unique approach, in that we are able to draw on data collected from a variety of projects conducted in Australia, Canada, Japan, Sweden, and the UK. Although the focus of each project differed slightly, there were overlaps, which address the three research questions posed in this chapter. Thus, we are able to draw on data from over 100 semi-structured in-depth interviews, conducted in Australia, Canada, Japan, and the UK, contextual analysis of secondary materials (e.g. company websites, news articles, trade publications), as well as results from environmental life cycle assessment (LCA) in Japan, Sweden, and Germany.

Interviews for the various research projects were conducted by the individual authors with entrepreneurs of rental platform owners, as well as current and potential users, in order to gain a more holistic understanding as to what the challenges are and how these could be overcome in the future. Entrepreneurs interviewed were selected purposefully after creating databases of fashion rental platforms available in each country. It may not be surprising that although a relatively large number of entrepreneurs were contacted to participate in the individual studies, the response rate was relatively low in that we had an average of 20 interviews per country. A reason that can be provided here is the fact that these entrepreneurs are dedicated to their business. Due to the size of their organisations, which

is often classified as micro (fewer than 10 employees) or small (fewer than 50 employees), these individuals only have limited or no time to spare. Nevertheless, the interviews conducted satisfied data saturation, which implies that no new information was found, with the last 2-3 interviews providing no new insights into the topics at hand. Participants were based in either key metropolis in the individual countries, or in cities that have a strong connection to the fashion industry (e.g. Australia – Sydney, Melbourne; Canada – Toronto; Japan – Tokyo; the UK – London, Manchester).

The qualitative data set was analysed using a grounded approach (Easterby-Smith et al., 2018), which allowed for patterns to emerge organically. Easterby-Smith et al. (2018) suggest a seven-step guide to interview analysis, following familiarisation with the data set, by carefully reading the transcripts and exploring verbal and where available non-verbal cues. This is followed by reflection and posing the ‘so what’ question, which seeks to understand the implications that emerge from the raw data set. The next stage is conceptualisation, which is the first stage of crystalizing out seemingly important themes, which are then catalogued and translated into focused and axial codes, thereby making the emerging themes easier to manage and reduce the initial codes. After discussing emerging themes in each of the data sets a coding framework was established, which ensured that consistency and allowed for discussions of any discrepancies, which were reviewed and recorded. After the coding framework was finalised, data sets were re-coded, which implies that each author looked back over the analysed data to ensure all themes were captured and/or parts re-looked at. The step was linking, whereby an analytical framework is established, the final findings presented. The final stage is re-evaluation, whereby feedback is gained, and improvements made to the analytical framework. In this case, feedback was thought within the interdisciplinary team, as some authors of the chapter are more qualitative focused, whilst others are specialists in LCA, which allowed for careful evaluation and a rigorous approach to data analysis.

LCAs conducted by the authors and past literature were further reflected upon, as LCA studies seek to provide a quantitative insight into the life cycle environmental impacts of clothing rentals. LCA studies are often conducted based on the functional unit of how often a single item of clothing is worn over its lifetime when rented versus owned. As such, it is vital to understand how much different garments are weighing in terms of the fabric used, what material compositions these items are made out of, what distances they may travel (e.g. from and to consumers, throughout supply chain), as well as the aftercare (e.g. laundering, dry cleaning).

Within the following section we will provide summaries of our findings and critically evaluate the implications these may have for fashion rental entrepreneurs in addressing the questions posed in this chapter.

## **KEY FINDINGS**

### **The Winners And Losers Of Online Fashion Rental Platforms**

This part of the findings section is concerned with addressing the first research question posed for this chapter: why some online fashion rental platforms are struggling whilst others are accelerating? As previously alluded to there seems to be a contradiction within the current literature and what is reported in media and business reports, in that consumers are seen to favour B2C over P2P for reasons of trust (e.g. Hu et al., 2018), yet P2P rental platforms, such as By Rotation, or My Wardrobe HQ seem to be thriving in this current climate (e.g. Chan, 2020; Leach, 2020). Having said that however, there are also examples of B2C platforms, for example YCloset in China, that had a slowdown of rentals in the beginning of the year 2020 yet have since recovered and record increased engagement (Chan, 2020). Thus, the question remains – why?

From our research, we found that one reason as to why certain entrepreneurial rental models are struggling may be associated with the market segment they are operating in as well as the type of model that they have developed. Table 2 provides an overview of a select few rental organisations operating globally, this is by all means not exhaustive, but provides a good indication as to what is happening in the market. What becomes apparent here is that those businesses that are B2C and focused on luxury rentals seem to have suffered more than others. As alluded to in an earlier part this could be due to the fact that in our newfound ‘slob chic’ lifestyle trend there are less occasions to actually wear these luxury outfits. Similarly, with individuals having been hit by the COVID-19 crisis, many have lost their jobs and thus are unable to justify spending any money on luxuries, whilst others save their disposable income, in case they too are hit by furlough schemes and/or redundancies (e.g. Brydges et al., 2020;

JPMorgan, 2020; Seares, 2020; Drapers, 2021), which was also reflected in our dataset. The success of airCloset, the largest fashion rental platform in Japan, can also be explained in the same way. airCloset targets working women as their customers and offers monthly subscriptions of three pieces of stylist-picked business casual to casual wear. When the COVID-19 crisis encouraged people to work from home, airCloset offered a new service that only contained tops, when it used to be a combination of a top, a bottom (e.g., skirts and pants), and a dress. They successfully gained new customers wanting to wear different clothing for video conferences. The fact that airCloset's offering of business wear was not severely affected by the COVID-19 crisis and their innovative service offering have contributed to the continuing growth of the business (Shimbun, 2020).

In a similar vein, we also see some rental organisations moving away from 'unlimited' rentals and/or swapping options. This could indicate that these options were costly and impractical for the rental companies and/or implied a loss made (e.g Rent The Runway). The longer individuals keep garments and wear them, the less this item can be rented out to others, and as such, is no longer a 'cash cow'. Thus, companies seem to be moving towards either short term rentals or limit the amount of garments that can be rented before an exchange needs to take place, thereby also posing limitations on how many garments can be rented within each subscription, with additional fees being charged for extras.

We see a stronger uptake of P2P rental models, which could be explained in that these often are linked to online communities. By Rotation for example not only offers customer reviews, but rather they have a community space on their website and provide style guides on how to wear garments (ByRotation, 2021b). During lockdown they have further taken an initiative to engage with their consumers and provide Instagram Live sessions and other gimmicks, thus it may not be surprising to see a 50% increase in listings on their website and an overall 600% increase of rentals (Banks-Walker & Graddon, 2020). Thus "By Rotation's success highlights the ways that the fashion rental market is shifting — and suggests that, for those in lockdown who have no need to dress up, a new friend might be the month's most desired accessory" (Leach, 2020). This outlines further that the rental market may need to shift, from being solely a business model, to becoming a social entity with a personality and character and thus, moves beyond being solely commercial.

*Table 2. Overview of fashion rental businesses globally*

<b>Name</b>	<b>Country</b>	<b>Est. in</b>	<b>Garment Type</b>	<b>Changes since COVID</b>	<b>Still in business</b>	<b>B2C/ /P2P</b>	<b>Reference</b>
YCloset	CN	2015	Casual wear	Added resale	Yes	B2C	Reuters, 2019; Chan, 2020
Rent The Runway	USA	2009	Designer clothing	Furlough staff, cut wage, froze subscriptions	Yes	B2C	Dua, 2020; Leach, 2020
Armarium	USA	2016	Luxury clothing & accessories	Struggle with high cost of rental business; ceased operations	No	B2C	Leach, 2020
Hurr Collective	UK	2017	Luxury clothing & accessories	Decrease in consumer base; Plan to collaborate with Selfridges	Yes	P2P	BBC, 2020; Chan, 2020
Girl Meets Dress	UK	2009	Luxury clothing & accessories	Struggle to create market share	Yes	B2C	Rose, 2020
My Wardrobe HQ	UK	2019	Luxury clothing & accessories	30% rental increase		P2P	Banks-Walker & Graddon, 2020;

							Conlon, 2020
By Rotation	UK	2019	Luxury clothing & accessories	50% increase in listings Mix between social platform and commerce 600% rental increase	Yes	P2P	Banks-Walker & Graddon, 2020; Leach, 2020
Relanda	DE	2018	Children's wear, casual wear	Closed down in Autumn 2020; Operated different platforms (e.g. Kilenda, stay awhile, Tchibo share)	No	B2C	Martin, 2020; Tchibo, 2020
Räubersache	DE	2015	Children's wear	Children's clothing unaffected	Yes	B2C	Martin, 2020
Circos	NL	2019	Children's wear	Partnering up with H&M - even though kids wear not seen to be future proof	Yes	B2C	Deeley, 2021
Vigga	DK	2014	Children's wear	Provides through Circos	Partially	B2C	Circos, 2021
airCloset	JP	2015	Business casual and casual wears	307% increase in membership from the year before	Yes	B2C	airCloset, 2020

Source: (authors' own)

Although consumers have indicated that renting can reduce risk (Hu et al., 2018) in that they can try out new things without having to pay the full price, during the pandemic it becomes apparent that the once lucrative subscription model is simply too expensive and seen as not affordable especially for generation Z (Leach, 2020). This has led to former highflyer Rent The Runway having to freeze their subscription models and also making changes to their overall strategies, for example removing the Unlimited Swaps option. Throughout our data collection, we have noticed that companies have moved away from a 'swap' option to a 'refund option' that is linked to various conditions, such as needs to be done within 24 hours, security tags cannot be removed, and more, thereby trying to avoid consumers continuously swapping items that might fit but may not be 100% to their taste. This provides rental platforms with more financial freedom, as they have less hidden costs associated with swaps and more control.

Disruptive business model innovations, especially in the tourism and transportation industries are seen to be lucrative due to their price points, as they are usually cheaper than their mainstream counterparts. Within the fashion industry this may not necessarily be the case, although in the short-term there may be financial benefits, in the long-term fashion rentals may get more expensive. This can be an issue, seeing as there are a lot more 'discounters' and 'online outlet' platforms emerging, with whom rentals now have to compete. For example, the luxury fashion rental Armarium had to cease its operations in March 2020, due to being unable to cover the costs of their business model, as they were competing with pure-play retailers such as Net-A-Porter who offer discounted luxury garments and may in the long-term be cheaper than the rental option that was offered by Armarium (Adegeest, 2020). Thus, e-



commerce platforms and especially pure-play retailers have caught onto the trend of providing similar products often cheaper, or even if not, the emergence of platforms such as DePop or Vinted make it easier to sell secondhand items that are no longer wanted. Even though these rental platforms emerged after the economic crisis and offer, at times, a cheaper alternative to ownership models, there are perceived risks and mistrust that underpin consumer willingness to engage. It remains to be seen if rental platforms will be able to regain their momentum from prior to the pandemic.

Availability and keeping up with trends are further key challenges that these rental platforms are faced with. No matter whether we focus on B2C or P2P, availability of different sizes and styles can be an issue, and often also an exclusion criterion, as a lack of availability will discourage some consumers from considering these disruptive innovations as alternative forms of fashion consumption.

With respect to consumers, initial findings indicate that the country context and thus, the cultural background of consumers, may play an important role in terms of uptake of rental platforms. Here our findings are in line with Iran et al. (2019) and Henninger et al. (2019) further outlines that there may also be a cultural angle associated with reusing garments, as some countries may have stigma attached to secondhand garments. Although the research context slightly differed, as the focus was on swap shops, rental platforms in general are not popular in Germany, as “people aren’t going to rent very basic clothes. Maybe if it’s something special like a coat or winter ski outfits, but it’s not really possible to rent the whole range of clothes” (Pinnock, 2019). This indicated that there may be cultural differences that impact on rental services and offerings for example in Germany rental providers focusing on children’s wear or sporting accessories (e.g. ski) seem to be more popular than those that focus on every day and casual wear. The platform Tchibo Share provides a statement on their website where they highlight “fail fast. Fail forward”, which implies that although their sharing platform had to cease business after only 2.5 years, Tchibo sees this as an opportunity to build on their knowledge and develop other sustainable business models in the future, as such it is seen as a means rather than an end (Tchibo, 2020). Whilst in the UK conscious consumers seem to be increasingly turning towards rental models, these seem to remain fragmented in the market, which could be due to a lack of infrastructure (Pinnock, 2019). A reason could be here that unlike in other countries, in the UK no major fast fashion retailers has incorporated fashion rentals as an alternative. Swedish brand H&M and Danish company Ganni have added new business strands as part of a loyalty scheme to attract more consumers to buy into the brand (Nazir, 2020), whilst Dutch company MUD has always been based on a leasing model.

Moreover, B2C businesses that are operating both online and offline are now also struggling during COVID-19. Retail spaces remain closed, which implies that these physical premises become a cost burden and thus, have an impact on the financial situation of these businesses. With COVID-19 presenting an unprecedented case, it is tough for these operations to make a call on whether to ‘ditch’ the physical space and focus solely online or hoping to re-open sooner rather than later and encouraging people to come back. A decision that is tough and can mean survival of a business.

*Table 3: Summary of SWOT analysis for P2P and B2C fashion rental platforms*

<b>Strength</b>	<b>Weakness</b>
<u>P2P</u> - Less financial pressure on business as individuals rent out idle capacities;	<u>P2P</u> - Lack of consumer trust when it comes to aftercare
<u>B2C</u> - Perceived consumer trust when it comes to aftercare	<u>B2C</u> - Financial pressure on business as owning idle capacities and reliant on revenue stream
<u>P2P &amp; B2C</u> - Flexibility to adapt modes (e.g. no Unlimited swaps; stylist picks to only include tops not bottoms) - In short-term relatively cheap - Allows consumers to try new styles without ownership commitment	<u>P2P &amp; B2C</u> - Rental in long-term expensive - May not always be able to follow trends - Availability of garments

<b>Opportunity</b>	<b>Threat</b>
<u>P2P</u> <ul style="list-style-type: none"> <li>- Online communities that facilitate belonging</li> <li>- Easy facilitation of renting out idle capacities – making it lucrative for individuals</li> </ul> <u>P2P &amp; B2C</u> <ul style="list-style-type: none"> <li>- Collaborations with mainstream businesses (e.g. pop-up events)</li> <li>- Increased environmental consciousness of consumers</li> <li>- Certifications that outline environmental benefits</li> </ul>	<u>B2C</u> <ul style="list-style-type: none"> <li>- Online and offline operations due to high rents may not be financially viable</li> </ul> <u>P2P &amp; B2C</u> <ul style="list-style-type: none"> <li>- Pure-play retailers offering garments at discounted prices (e.g. YOOX, Net-A-Porter)</li> <li>- Re-sale apps (e.g. Vinted, Depop)</li> <li>- Mainstream retailers incorporating rentals as part of their business model (e.g. H&amp;M, Gianni)</li> <li>- COVID-19 and hygiene concerns</li> <li>- Infrastructure set up to deliver rentals, cleaning services etc.</li> </ul>

Source: (authors' own)

Table 3 provides a summary of the points raised, by outlining key challenges these fashion rental platforms face. Although some of the aspects highlighted are specific to either P2P or B2C fashion rentals, a majority of points raised are applicable to both.

To conclude there is not one reason as to why some of these entrepreneurial ventures may be struggling, but there are multiple ones that can occur in any combination. Whether it is simply a 'tough luck' situation that has been fostered by COVID-19 and the fact that social occasions have stopped, and thus the need for certain fashion rentals, or the fact that some fashion rentals have evolved from being commercial to becoming social entities with a personality and character that are seen to be different. What can be said for sure is that there is no right way of dealing with the struggle, as no one will ever be able to please all audiences, but we may see a shift in the future of rentals, similar to the tourism industry, where there is a move away from a simple holiday to an experience.

### **Sustainable Solution Or Sustainable Illusion**

The year 2020 has had and is still having a significant impact on fashion rental platforms, prior to 2020 fashion rentals have been proclaimed to be "the future of fashion" by Bloomberg (Leach, 2020). It was highlighted that "rental can be fun. It's a one-night stand. But you can look good with the virtue factor of knowing you haven't done any damage to the environment" (Little, 2019). Thus, fashion rental companies were and still are portrayed as more sustainable alternatives to the dominating 'take-make-use-dispose' or fast fashion paradigm. Yet, whether or not this is a reality is questionable and lacks research (Retamal, 2017). Piontek et al. (2020) note that their results based on casual wear rental services in Japan and Germany highlight the environmental benefits are very much dependent on the type of garment and how often these are worn when they are rented. A white T-shirt for example may not make a lot of sense to rent because the number of wear-time is less likely to increase even when rented, compared to garments that are only worn occasionally when owned, such as dresses. Similar arguments have been made by Tukker (2015) and Johnson (2020), thereby indicating that some of the environmental benefits may be dressed up, perhaps to create a hype or to encourage people to rethink their current consumption habits. Based not only on data from our projects, but also by conducting secondary research, we also found that there may not be an actual representation of what is currently rented, as the majority of papers and studies published and/or undertaken focus either on common items (e.g. dress, jeans, t-shirt), or those that may be rented as one offs (e.g. overcoats, jackets, jumpsuits) (Zamani et al., 2017; Piontek et al., 2019). Although acknowledged in these studies, neither study takes into account that a dress is not necessarily a dress, as there are differences in terms of style (e.g. colour and/or print), which could have an impact on the actual greenhouse gas emissions. One reason here is that LCA is a data-driven analysis method, where inventory data to compute environmental impacts of

garments are largely lacking. Zamani et al. (2017) further state that increased use of fashion rentals can also be a risk, as transportation and cleaning of these garments increases, the more they are utilised, which could potentially counteract the initial environmental benefits that are being portrayed.

As illustrated, there are more questions that can be asked than answered when reflecting on whether fashion rentals are more sustainable alternatives or not. Following in line with Piontek et al. (2020) it is apparent that there are environmental benefits, yet these are more significant for formal wear, or items that are worn on occasions. Similarly, the actual rental services provided may have an impact on this, as those companies allowing for swaps to happen may create more environmental impact than those that do not, seeing as garments are not only transported to and from the consumer, but also may need to be cleaned without having been worn. This could also, perhaps be a reason, as to why Rent The Runway is stopping its 'Unlimited Swaps' option (RentTheRunway, n.d.). Although fashion rentals have taken up in the 21<sup>st</sup> century, and some companies having exceeded expectations especially prior to COVID-19 (e.g. Rent The Runway, Girl Meets Dress), these disruptive innovations are not mainstream, and thus may overall not have a big impact on reducing greenhouse gas emissions. Even though companies such as H&M and Urban Outfitters have trialled rentals in 2019, and Hurr Collection and My Wardrobe HQ have had pop-up stands in well-known department stores, they remain niche (e.g. Little, 2019; Chan, 2020; Leach, 2020).

In reflecting on our research question on whether fashion rentals are a more sustainable option, the answer is – it depends. Fashion rentals do have the potential to make an impact, yet it also depends on consumer attitudes and willingness to change their consumption practices, as rentals should not be seen as yet another option of 'shopping', but rather a more conscious way to consume and overall reduce fashion consumption. Yet, with it being rather niche and not available everywhere, meaning that rental companies and or platforms are predominantly facilitated in urban areas with a well-suited infrastructure, their overall impact may be limited. Similarly, there may be a need to provide more education on fashion rentals, as currently claims being made of rentals being the 'guilt free one-night stand' may be misleading, as depending on the item rented there may be a bigger impact or almost none.

## **What To Say And What Not To Say**

This last section focuses on the third question posed and thus contemplates what rental platform entrepreneurs could communicate or how they could communicate better what they see as their unique selling points.

With the rise of environmental consciousness, partially enhanced through the current COVID-19 pandemic (WRAP, 2020a, b; Brydges & Hanlon, 2020), entrepreneurs could showcase their sustainable credentials. This does not mean making claims about being more sustainable alternatives to, for example, purchasing first hand, but rather to showcase their third party accreditations. Table 4 indicates that there are some rental platforms that have third party accreditations featured on their website, such as Certified B Corporation, the Positive Luxury Butterfly mark, the Eco-Age Brand Mark, or they committed to the Ecologi pledge. All of these accreditations featured on their websites are indications that these rental companies are going the extra mile and actively seek to be more 'sustainable' solutions. Interestingly, when researching these companies, it is not always straightforward to see these credentials, in some instances they are at the bottom of the page and require individuals to scroll all the way to the footer, or they are almost hidden in a sustainability section, which requires the consumer to have an active interest in either the sustainability section and/or the credential showcased. It could be suggested that these marks however are a unique selling point, which may become even more important in the future. For example, Certified B Corporation implies that these rental platforms "are businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose" (BCorporation, 2021) and are thus, leading the way to a more sustainable future. Similarly, the Positive Luxury Butterfly mark is a trusted mark that showcases a brand's dedication to sustainability (Langley, 2021), whilst the Eco-Age brand is only awarded to businesses that have a commitment to sustainability, by reducing their environmental impact, by being transparent and by showcasing (eco) innovation. Seeing as sustainability was and remains a buzzword in the industry, highlighting the efforts being made to comply with sustainability related issues can be vital and set these companies apart, not only in the rental market, but also when it comes to, for example, competing for collaborations with brands such as H&M, Gianni, Selfridges and/or Urban Outfitters.

Table 4. Examples of rental platforms that have a sustainability related certification.

Name	Country	Established in	Certification
GlamCorner	Australia	2012	Certified B Corporation
My Wardrobe HQ	UK	2019	Positive Luxury Butterfly Eco-Age Brand Mark
By Rotation	UK	2019	Eco-Age Brand Mark Ones to Watch – Drapers Sustainability Award 2020
Rotaro	UK		Ecologi climate positive workforce
Hurr Collective	UK	2017	Ecologi climate positive workforce

Source: (authors' own)

Seeing as P2P rental platforms seem to have taken a leading position, it may be beneficial to learn from their success. As was indicated By Rotation has moved away from being solely a commercial entity to strongly emphasise the social aspect. Building a community and making sure that consumers are not only seen as 'cash cows' but as individuals that are part of the renting lifestyle can enhance engagement and buy in, and thus, lead to increased uptake. As alluded to earlier, we have moved away from simply being a material society to an experience society, therefore it will become even more important in the future to be part of this new trend and ensure that these experiences can be delivered.

In this unprecedented environment it is further important to communicate with customers and ensure that they are feeling safe to rent garments not only now, but also in the future. Highlighting how a crisis is managed can be a crucial selling point, as people will remember how businesses have treated not only their staff, but also their customers. Dore et al. (2020) point out that "during the COVID-19 pandemic, companies that lead with empathy and genuinely address customer needs can strengthen relationships".

## Future Research Directions

From the insights provided in this chapter it becomes apparent that although there are similarities and differences between B2C and P2P rentals these have not been explored in detail. Although there are a variety of publications that have focused on rental platforms (Mukendi & Henninger, 2020; Brydges et al., 2020) these have not made clear distinctions on whether the focus is on P2P or B2C or whether there may be a difference between them. This, however, could be of significance, given the fact that our chapter indicated that some fashion rental platforms are struggling to survive.

Although fashion rental platforms are seen to be more sustainable, this has not been backed up with scientific evidence. If we believe that fashion rentals are the future, we need to provide more convincing data that our 'wardrobe' in the cloud can have the desired impact and that the benefits outweigh the drawbacks of these models. We currently know that rental garments, especially for online renting platforms are transported back and to the company, and as such there is an additional CO2 emission that needs to be calculated in. Garments need to be cleaned once they have been with the consumer in order to adhere to hygiene standards, which might either mean use of chemicals for dry cleaning purposes, or water for wet laundering. Increased wear of garments could further test the durability of the material and even though it was intended to be worn more often could end up being discarded if consumers are not taking care items. What has also not been considered as of yet is the fact that fashion rentals, similarly to fast fashion could increase consumers' fashion appetite in that they may want to access to more and more clothes at a fast speed, which would pose the question of what might be the lesser of both evils?

As indicated, there are cultural barriers toward secondhand consumption, which by nature also impacts on rentals. In order to be able to assess this impact more studies need to be conducted in different

cultural contexts, especially in the Global South, which currently lacks research (e.g. Iran & Schrader, 2018).

## **Conclusion**

This chapter was set out to provide an overview of opportunities and challenges rental platforms, and more specifically rental platform entrepreneurs, but also their consumers face in the 21<sup>st</sup> century that is not only coined by technological innovations that provide the opportunity to facilitate these online platform businesses, but also by sustainability activities and the COVID-19 pandemic. As such, we posed questions that seek to understand why some of these fashion rental platforms are struggling to survive, whilst others are thriving. We further posed the question of whether these rental models are truly more sustainable alternatives and how these fashion rental entrepreneurs could communicate their unique selling points better, thereby attracting more consumers to engage in these alternative forms of fashion consumption.

What becomes apparent after reading this chapter is that there are more questions raised than answers provided, which highlights that there are opportunities for future research. For example, we saw rental platforms mushrooming out of nowhere after the credit crisis in 2008 – what we do not know however, is what the motivations were of these fashion rental entrepreneurs. To explain, there may have been different motivational drivers to setting up these businesses: such as, being opportunistic and thus, being able to capitalise on what seemed to be crisis situation (referring to the credit crisis in 2008) and turning it around to make it into a business opportunity. Another driver could have been a passion for sustainability and leading change; with media and industry reports highlighting that changes need to be implemented as the current take-make-use-dispose model is not sustainable. Technology also will have played a vital role, as without it these fashion rental entrepreneurs may have not been able to set up their platforms and communicate with their target audience, and/or build a community of peers that actively engage in the access based consumption process. Nor would they have been able to facilitate their business idea if the infrastructure would not have been available (e.g. only payments, delivery services, cleaning services).

Similarly, from a consumer side we can currently only assume what motivated fashion rental entrepreneurs and also individual consumers at the time they engaged with access based consumption models (here rental platforms) and what motivates them now to take part and facilitate these fashion rental platforms. May it have simply been the thrill of something new and exciting? A genuine interest in reducing their carbon emission footprint? Or simple risk aversion, in that they can ‘try before they buy’? These are questions that currently remain unanswered. In the same vein, we do not know whether motivations will change post-COVID-19. All these questions posed provide further avenues for future research.

As was demonstrated there are different types of business models available: B2C and P2P, both of which come with their own set of advantages and disadvantages. We indicated that P2P platforms may have flourished especially since the COVID-19 pandemic, as they are often associated with more social structures, including, but not limited to being able to ‘talk’ to fellow consumers, creating a community around fashion styling and lifestyle, and potentially also sharing stories. Nevertheless, we have also seen success stories on the B2C side, whereby Ycloset in China and aircloset in Japan recorded profits, after having switched around their business subscription models, to cater for the newly emerged ‘slob chic’ trend. Whether or not we will see a change in how platforms are run and/or different services provided (e.g. buying option) will be seen in the future.

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