

Article

Investigation of Fashion Sharing Platform for Sustainable Economy—Korean and International Fashion Websites before and after COVID-19

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Abstract: In this study, we analyzed the changes in South Korean and international fashion sharing websites before and after the COVID-19 pandemic to suggest ways to use fashion sharing services for sustainable fashion. Additionally, we evaluate the usability and accessibility of the site to provide usable data when configuring the fashion sharing service site. Changes in various elements of 21 domestic and foreign fashion sharing websites were analyzed. Five websites were selected and assessed for their usability and accessibility using Likert scales. Results revealed that the sharing price was approximately 30% of the selling price, and international websites offered more diverse brands, items, and sizes than South Korean websites. Regarding usability, “Rent-It” and “Rent the Runway” scored high points, and “Rent the Runway” had a high average value for accessibility. Additionally, despite the given circumstances, only two South Korean and a few international websites seemed to be advertising about hygiene, on topics such as laundry and sterilization. Therefore, in South Korea, focusing on one or two shared items, securing a wide range of brands, items, and sizes, and advertising hygiene is essential. A fashion sharing website focused on effective usability, accessibility, and product hygiene will ensure sustainable fashion sharing remains stable.

Keywords: sharing economy; fashion sharing service; sustainable economy; COVID-19



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1. Introduction

Diverse consumption patterns, such as recycling, upcycling, fair trade, and vegan fashion, are becoming increasingly popular due to consumer lifestyle changes caused by various ethical, rational, and environmental considerations. In particular, forms of consumption referred to as the sharing economy and collaborative consumption have become popular, globally. In the sharing economy, individuals borrow what they need and lend what they do not need without owning production facilities or services [1–3]. Services—including people sharing accommodations, cars, offices, toys, and bedding—have been established as convenient resources for consumers. Since 2008, fashion sharing services have emerged worldwide after first appearing in several countries in North America and Europe. “Rent the Runway”, a fashion startup founded in the United States, became a “unicorn” company in 2019, representing innovative success in the field of fashion in the sharing economy [4]. Similarly, the fashion startup “Le Tote” made headlines when it acquired the 193-year-old department store Lord and Taylor. In addition to such fashion startups, American department store Bloomingdale’s, American fashion brand Banana Republic, and Swedish brand H&M have recently begun offering clothing rental services, which are expected to grow at an average rate of 10% per year until 2023 [5]. Thus, the fashion sharing market in the United States has existed for over a decade and has experienced an exponential growth. Similarly, clothing rental markets in Japan and Europe have been growing contin-

uously, and they are considered an example of the sharing economy with a high potential for growth.

Since the emergence of the fashion sharing service “Want to Wear”, more than 10 online and offline fashion sharing service startups and companies, such as “Project Ann” and “Rent-It”, have emerged in South Korea in the past five years [6]. However, the COVID-19 pandemic and development of non-face-to-face technology has led to the development of a noncontact trend, affecting several industries and ushering in a “new normal”. Consequently, businesses operating in the sharing economy, including fashion sharing services, have been affected. A primary example is the global accommodation-sharing company Airbnb, which announced its plan to lay off more than 20% of its employees due to the pandemic’s impact on the travel industry. The world’s largest car-sharing service Uber also announced its plan to close or consolidate 45 offices globally and downsize 25% of its total workforce after experiencing a 29% decrease in revenue compared to 2019. Furthermore, the office-sharing company WeWork decided to restructure the company [7,8].

Despite these circumstances, sharing economy platforms have been trying to adapt to the new normal and create diverse sharing services to turn the COVID-19 crisis into an opportunity. For instance, space-sharing companies have created programs that allow the human resource infrastructure of related businesses to be used as non-face-to-face services to increase consumer demand and facilitate the smooth management of businesses by sharing small-scale office spaces. Such programs have reduced unnecessary business expenses amid a recession by decreasing fixed costs, such as office security deposits. Furthermore, car-sharing services have highlighted the importance of sharing services by recommending car-sharing and the use of electric scooters to avoid using public transportation and minimize contact with other people [9,10]. However, fashion sharing services have not yet established specific strategies to deal with the present circumstances. Extant studies on such services are primarily limited to reports or investigations of the fashion sharing economy [11–14]. Research is being conducted on the fashion sharing economy models and types [15,16] and measures to promote it [17–21].

Kang [19] identified user needs for the fashion sharing service from the perspective of female users in their 20 s and 30 s and suggested an intimate and stable 1:1 personal transaction method, a personal recommendation service, 1:1 community activation, and a delivery pickup service. Lim [20] realized the design of the iCloset service, a fashion sharing service that introduced the concept of personalized fashion item recommendation as an activation method suitable for domestic situations based on the current status of fashion sharing services. iCloset is a service that provides fashion products that can be accessed quickly anytime, anywhere based on mobile/web-based online transactions, and recommends 1:1 fashion items to people who lack a sense of fashion. Kwun [21] analyzed the factors that led to the success of a U.S. fashion sharing platform and suggested building a shared service base, raising awareness of sharing, improving the quantity and quality of shared resources, and expanding trading channels.

So far, although models and types of fashion sharing service sites have been analyzed, there is still a lack of specific and in-depth analysis of products, prices, and sharing methods for fashion sharing service sites. In addition, recently, Fedushko et al. [22] explored ways to overcome the COVID-19 crisis by developing a mechanism to improve the efficiency and effectiveness of the web projects. However, no studies till date provide an in-depth analysis of cases of domestic and foreign fashion sharing platform sites from the user’s point of view.

To fill that gap in the literature, this study categorizes and analyzes effective factors of actively used South Korean and foreign fashion sharing websites and determines the factors that have changed with the emergence of the new normal. Additionally, we evaluate the usability and accessibility of fashion sharing websites to provide preliminary data that can be used to establish platforms suitable for the new era. Finally, measures are proposed to improve the efficiency of such services for users.

2. Materials and Methods

2.1. Research Protocol

Figure 1 depicts the process of investigating and evaluating South Korean and international websites to understand the characteristics of websites that are suitable for the new era. Investigation of the websites was conducted on two separate occasions, once each in 2019 and 2020. Based on the results, five websites were selected and their usability and accessibility were evaluated. The first round of investigation and analysis was conducted from 1 September to 30 September 2019, and the second from 1 December to 20 December 2020. Evaluation of the usability and accessibility of the five fashion sharing websites was conducted from 21 to 30 December 2020.

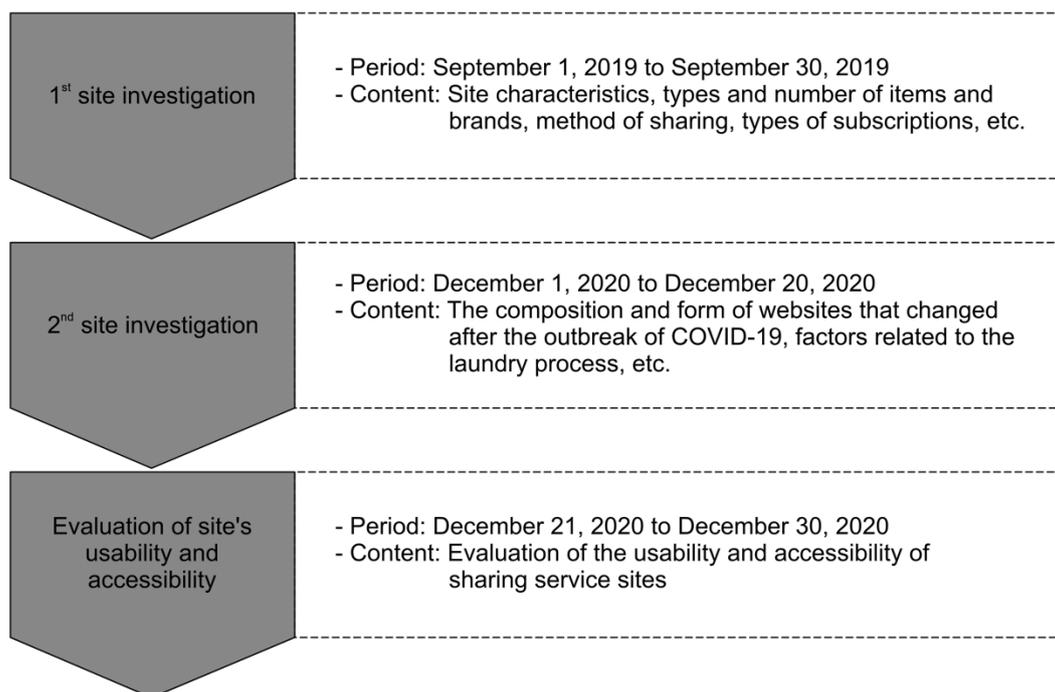


Figure 1. Process of investigating and evaluating South Korean and foreign fashion sharing websites.

2.2. Investigation of Websites Providing Fashion Sharing Services

A total of 50 websites were first selected based on prior research [3,15,18]. Of these, 21 actively running South Korean and international fashion sharing websites were chosen for analysis in this study: 8 South Korean websites and 13 international websites from the United States (4), the United Kingdom (2), Australia (1), Singapore (2), China (3), and Hong Kong (1). The 13 foreign websites included the United States' "Rent the Runway", "Le Tote", "Gwynnie Bee", and "Armarium"; the United Kingdom's "Girl Meets Dress" and "Chic by Choice"; Australia's "GlamCorner"; Singapore's "Runway Rent", and "Style Theory"; China's "Meilizu", "Ms. Paris", and "YCloset"; and Hong Kong's "Yeechoo". The eight South Korean websites included "Rent-It", "Salon de Charlotte", "Shirts Butler", "Sister's Closet", "The Open Closet", "Weekly Shirts", "14 days", and "Seinustar."

In the first round of investigation, we examined the main products offered, methods of sharing products, types of subscriptions, and service costs to determine the characteristics of fashion sharing websites. This included an examination of the types and number of items offered, types and number of brands, total number of products, sizes offered per product and per brand, rental and retail price per product, and other special features. "Item" refers to the category provided on each website, for example, jackets, blouses, shirts, pants, skirts, and bags. The "total number of products" refers to the total number of products provided for each brand and each item (Table 1).

Table 1. An example of the calculation of the total number of products provided by each fashion sharing website.

	Item	Brand	Number of Products Offered per Item and per Brand	Total Number of Products
Sharing website A	Skirt	A brand	5	$8 + \alpha$
		B brand	3	
		
	Blouse	A brand	2	$9 + \alpha$
		C brand	7	
		

In the second round of investigation, we assessed the factors that changed after the COVID-19 pandemic, ranging over a period of one year. Some of these included changes in the websites' composition and form, number of brands and items, and the services' laundry-related processes. Research on rental service sites was conducted by three doctoral students pursuing studies in clothing and textile. The Chinese sites were analyzed by a Chinese student currently in clothing and textile graduate school in Daejeon, South Korea. Three researchers visited the 21 selected websites to predetermine the required contents for the survey, and conducted research and analysis in the given format. To maintain coder reliability among evaluators, quantifiable data were collected. In cases where qualitative content or data were required, researchers screen captured and collected all data.

2.3. Evaluation of Website Usability and Accessibility

The following five websites were chosen for an evaluation of their usability and accessibility: "Rent the Runway", "Rent-it", "Gwynnie Bee", "Girl Meets Dress", and "Sister's Closet". The evaluation process was conducted by 10 students majoring in clothing and textile who were highly interested in fashion and had no previous experience with these services. Site evaluation was conducted in two steps. Website usability (ease and efficiency of use) was evaluated in Step 1, and website accessibility (level of user satisfaction) was evaluated in Step 2. In Step 1, the evaluators accessed the five websites in a random order for a duration of five minutes each and then evaluated them according to nine questionnaire items. In Step 2, the evaluators accessed the websites (in random order) as if they were looking to rent a "dress for a special party". They selected an outfit, noted the time it took them to reach the transaction step, and evaluated the sites' accessibility according to 13 questionnaire items. To analyze the websites, we chose dresses, as they were rental items offered by all five sites.

The questionnaire items to evaluate website usability were developed by reviewing 27 questions from a previous study [23], of which nine related to fashion websites were chosen. These dealt with (1) the user's degree of recognizing the location of the information tree, (2) user satisfaction with the website's language support, (3) suitability of the website's visual imagery, (4) adequate provision of navigation tools, (5) user satisfaction with the time it takes to load each web page, (6) consistency of each web page, (7) consistent design and arrangement of colors of each web page, (8) user satisfaction with the number of main menu and submenu items, and (9) user satisfaction with the size, font, and style of the web page text. A five-point Likert scale was used to evaluate these items (1 = strongly disagree, 5 = strongly agree). User accessibility was evaluated through questions created by reflecting on the opinions of 10 fashion experts. The 13 questionnaire items were evaluated on an 11-point Likert scale (0 = strongly disagree, 5 = neither agree nor disagree, 10 = strongly agree). Of the 13 questions, one enquired about the comprehensive satisfaction of website users, and the remainder were more detailed questions regarding the types of products, style preferences, diversity of sizes, rental costs, atmosphere of sites, classification of categories, description of product details, convenience of product descriptions, the way the products were listed, inclusion of images with clothes being worn, user reviews, and user satisfaction with laundry and sterilization services.

2.4. Data Analysis

We categorized, quantified, and compared the factors of websites that provide fashion sharing services. Statistical analyses were performed using SPSS (version 24.0; IBM, New York, NY, USA) to evaluate the usability and accessibility of websites for consumers. Furthermore, a descriptive statistical analysis, one-way ANOVA test, and Bonferroni post-hoc test were conducted with a significance level of $p < 0.05$ to analyze the usability and accessibility of websites according to the evaluation items.

3. Results and Discussion

3.1. The State of South Korean and Foreign Fashion Sharing Websites

3.1.1. Characteristics of Fashion Sharing Websites

The primary characteristics of South Korean and foreign fashion sharing websites, that is, types of subscriptions, number of brands, number of items, and sizes available for rentals were analyzed. The results are summarized in Table 2.

A detailed examination of the various characteristics of the websites demonstrated that “Rent the Runway”, the leading fashion sharing platform in the United States, provided the latest trending items for rent due to the availability of their in-house brand in addition to partnering with diverse brands. In other words, it possessed a large number of fashion items and more than 1900 brands. Furthermore, it provided everyday clothes and dresses for a variety of events as well as accessories suitable for the clothes, making it quick and easy to rent all items from one site. They also offered a wide range of sizes, from XS to 2XL, and provided customers with a free back-up size to ensure that they were able to rent the appropriate size. Furthermore, “Rent the Runway” helped customers understand the fit of the items by providing customer reviews with pictures of the items worn by the customers. It also garnered a highly positive response by providing personal styling consultations. It offered monthly subscriptions with different fees and services based on factors such as the rental period and number of items that could be rented. In particular, “Rent the Runway” increased its service accessibility by operating an omni-channel, with both online (website, mobile app) and offline stores. Additionally, they provided services such as rental insurance, back-up sizes, and their own distribution system to build their users’ trust.

In addition to “Rent the Runway”, “Le Tote”, and “Gwynnie Bee” were also highly used. “Le Tote” comprised more than 500 brands and offered a larger number of items, including various types of accessories comparable to “Rent the Runway”. They also offered diverse sizes and long-term rentals by setting their rental period to one month, unlike other sharing services. Similarly, “Gwynnie Bee”, which specialized in plus-sized women’s clothing, offered a large selection of items. Furthermore, they offered a 30-day free trial period, after which customers could continue using the services for approximately \$70 per month. This led to a high level of customer satisfaction.

“Girl Meets Dress”, an actively used website in the United Kingdom, primarily offered a rental service for dresses of high-end designer brands at a reasonable price. It also provided customers with accessories and make-up products to go with the dresses for special occasions such as parties. Subscription services were categorized into standard and premium membership. The premium membership service was used by consumers who attended multiple functions because the service allowed them to rent an unlimited number of items.

Australia’s “GlamCorner” also offered a selection of designer dresses and accessories for rent and received a positive response for including try-on services and back-up dress reservations so that users could exchange the rental items if they did not fit. Moreover, “GlamCorner” employed personal stylists to provide users with personalized recommendations if required.

Table 2. Characteristics of South Korean and foreign fashion sharing websites.

Fashion Sharing Websites, Country, and Year	Product	Characteristics	Types of Subscriptions	No. of Brands	No. of Items	Available Sizes
Rent-it (RK), 2017	Luxury fashion	<ul style="list-style-type: none"> • Mostly bags; also dresses and accessories • Periodic subscriptions: once a month, items can be exchanged • Rental items differ according to subscription plan <ul style="list-style-type: none"> - Standard periodic subscription: Only select items are available - Premium periodic subscription: All items 	<ul style="list-style-type: none"> • Short-term • Periodic (standard, premium) 	83	9	<ul style="list-style-type: none"> • 1 size per clothing item • 44, 55, 66
Salon de Charlotte (RK), 2016	Luxury fashion	<ul style="list-style-type: none"> • Directly operated by Lotte Department Store (requires in-person visits) • Rental dresses; hanboks (traditional Korean clothing); men's suits for weddings, first birthday ceremonies, concert recitals • Children's hanboks, dresses, and suits 	<ul style="list-style-type: none"> • 1-time 	3	7	<ul style="list-style-type: none"> • Children's sizing: sizes 1–20 • Adult sizing: 55, 66
Shirts Butler (RK), 2017	Men's shirts	<ul style="list-style-type: none"> • Men's dress shirts for office work • 3- or 5-piece set of high-quality dress shirts available for 1-week rentals • Rentals: delivered Monday mornings, midnight to 6 a.m.; Returns: clothes collected if hung on front door handle before 12 a.m. on Mondays 	<ul style="list-style-type: none"> • Periodic 	-	-	-
Sister's Closet (RK), 2017	Dresses	<ul style="list-style-type: none"> • Only dresses are available for rent 	<ul style="list-style-type: none"> • 1-day • 1-week 	34	1	<ul style="list-style-type: none"> • 55, 66 • 44, 77 In small quantities
The Open Closet (RK), 2011	Formal wear for interviews	<ul style="list-style-type: none"> • Primarily in-person rentals • Formal men's dress shirts and women's blouses • Cannot select outfit • Items provided based on size or style required • Small selection of clothing from donated clothes 	<ul style="list-style-type: none"> • 4-day 	-	8	<ul style="list-style-type: none"> • Body measurements listed
Weekly Shirts (RK), 2016	Men's shirts	<ul style="list-style-type: none"> • Primarily men's dress shirts for office work (99 types) • T-shirts, jeans, and standard pants that can be worn with dress shirts • Cost changes according to the number of dress shirt rentals 	<ul style="list-style-type: none"> • 1-week • 2-week • Periodic 	-	5	<ul style="list-style-type: none"> • Shirts: slim-fit, regular-fit (95–115)

Table 2. Cont.

Fashion Sharing Websites, Country, and Year	Product	Characteristics	Types of Subscriptions	No. of Brands	No. of Items	Available Sizes
14 days (RK), 2017	Vacation clothes	<ul style="list-style-type: none"> • Clothes for vacation destinations available for rent • Items can be picked up/returned at airports 	<ul style="list-style-type: none"> • 4-day • 8-day 	57	4	<ul style="list-style-type: none"> • 44–66 • 77 in small quantities • 2 sizes for children’s clothing
Seinustar (RK), 2016	Travel wear	<ul style="list-style-type: none"> • Clothes can be rented by foreign tourists visiting South Korea (ideal for tourists from countries without a winter season, who do not have to purchase winter clothing) • Korean users borrow package of items required at travel destination (can be picked up and returned at Incheon International Airport) 	<ul style="list-style-type: none"> • 1-time 	-	-	-
Girl Meets Dress (UK), 2009	Designer dresses, accessories	<ul style="list-style-type: none"> • Standard: up to 2 long dresses and 3 short dresses • Premium: unlimited rentals • Accessories and makeup products available for rent 	<ul style="list-style-type: none"> • 1-month 	334	6	<ul style="list-style-type: none"> • 8–12 • 6, 14, 16 in small quantities
Chic by Choice (UK), 2014	Designer dresses, accessories	<ul style="list-style-type: none"> • Primarily dresses and jumpsuits • Accessories available for rent (limited selection of items) 	<ul style="list-style-type: none"> • 4-day • 8-day 	58	6	<ul style="list-style-type: none"> • 8–12 • 6, 14, 16 in small quantities
Rent the Runway (US), 2009	Everyday clothes (All types of items)	<ul style="list-style-type: none"> • Large number of accessories, everyday clothes, and dresses for different occasions • System of partnering with brands, operation of in-house brand • Personal styling consultations, at-home try-ons available • Provision of free back-up size • Special rental service for bridesmaids (price calculated per person, individual styling consultations, at-home fittings available) • Cost changes according to number of rental items 	<ul style="list-style-type: none"> • 1-month 	1881	13	<ul style="list-style-type: none"> • XS–XL, • 2XL in small quantities • 0–14, 16 & 18 in small quantities • 24–31, 32 in small quantities
Le Tote (US), 2013	Everyday clothes (All types of items)	<ul style="list-style-type: none"> • 1-month rentals (must be returned within a month) • Maximum of 2 rentals possible per month • Large selection of accessories • Cost changes according to number of rental items 	<ul style="list-style-type: none"> • 1-month 	510	15	<ul style="list-style-type: none"> • XS–XL for most items, 2XL in small quantities

Table 2. Cont.

Fashion Sharing Websites, Country, and Year	Product	Characteristics	Types of Subscriptions	No. of Brands	No. of Items	Available Sizes
Gwynnie Bee (US), 2011	Everyday clothes (All types of items)	<ul style="list-style-type: none"> Primarily carries plus sizes After a 30-day free trial period, service costs about \$70 per month Cost changes according to number of rental items 	<ul style="list-style-type: none"> 1-month 	369	8	<ul style="list-style-type: none"> XS–4X, 5X in small quantities 0–16, 14–24W in small quantities
Armarium (US), 2015	Luxury dresses	<ul style="list-style-type: none"> Primarily dresses, which can be selected according to designer Small selection of pants, skirts, blouses, coats, bags, and accessories also available for rent 	<ul style="list-style-type: none"> 5-day 	74	12	<ul style="list-style-type: none"> 1–2 sizes per clothing item
Glam Corner (AU), 2012	Designer dresses, accessories	<ul style="list-style-type: none"> Provision of try-on service (additional cost) If needed, personal stylists make fashion recommendations Can reserve back-up dresses in case rented clothes do not fit (additional cost) 	<ul style="list-style-type: none"> 1-time (4-day, 8-day) Membership 	146	18	<ul style="list-style-type: none"> 8–14, 6 & 16 in small quantities
Runway Rent (SG), 2015	Evening dresses, Men's formal wear	<ul style="list-style-type: none"> Evening dresses, children's dresses, and men's suits Dress exchange service (additional cost) Add-on make-up/hairstyling services 	<ul style="list-style-type: none"> 4-day 8-day 	5	2	<ul style="list-style-type: none"> 1–2 sizes per clothing item XS, S, M, L, XL
Style Theory (SG), 2016	Everyday clothes (All types of items)	<ul style="list-style-type: none"> Type and number of available rental items change according to the price 3 to 5 expensive clothes items can be rented at one time Only clothes are available for rent 	<ul style="list-style-type: none"> 1-month 	-	7	<ul style="list-style-type: none"> XS–L for most items 2X in small quantities
Yeechoo (HK), 2016	Designer dresses, accessories	<ul style="list-style-type: none"> According to rental period, different types of clothes can be selected, and cost changes 	<ul style="list-style-type: none"> 4-day 7-day 14-day 	109	6	<ul style="list-style-type: none"> 1–2 sizes per clothing item 0–6

Table 2. Cont.

Fashion Sharing Websites, Country, and Year	Product	Characteristics	Types of Subscriptions	No. of Brands	No. of Items	Available Sizes
Meilizu (CN), 2015	Designer dresses	<ul style="list-style-type: none"> • 3 items of clothing can be rented, and unlimited exchanges are available • Primarily dresses • Available rental items change according to type of subscription 	<ul style="list-style-type: none"> • 1-time • Monthly • Half-yearly • Yearly • Method of recharging the amount to be used 	123	2	<ul style="list-style-type: none"> • 1–2 sizes per clothing item • S, M, L, Free
MsParis (CN), 2015	Everyday clothes (All types of items)	<ul style="list-style-type: none"> • 3 items of clothing and 1 bag/accessory (or 1 luxury item) can be rented; unlimited exchanges available • Additional clothes can be rented at an additional cost • Primarily dresses 	<ul style="list-style-type: none"> • Monthly • Half-yearly • Yearly 	312	3	<ul style="list-style-type: none"> • S–XL for most items • XS, 2X in small quantities
YCloset (CN), 2015	Everyday clothes (All types of items)	<ul style="list-style-type: none"> • Cost changes according to number of rental items • For 1-time subscriptions, a maximum of 10 pieces can be rented • Dresses only available for 4-day rentals 	<ul style="list-style-type: none"> • 1-time • Monthly • 3-month 	641	11	<ul style="list-style-type: none"> • S–L for most items • XXS, XS, S in small quantities

However, South Korean fashion sharing websites had a smaller selection of clothes than foreign websites. This is because many South Korean websites specialized in items belonging to only one category, unlike international websites that included items from diverse categories. For instance, “The Open Closet” comprised only formal dress shirts for men and women’s blouses appropriate for interviews. “Shirts Butler” and “Weekly Shirts” offered dress shirts for men working in offices. In addition, “Seinustar’s” service relied on travel wear as their main rental item for tourists visiting South Korea, wherein users could rent and return items at the airport, while “14 days” allowed users to rent items from a selection of vacation clothes that could be picked up and returned at the airport.

In contrast to fashion sharing services in other countries, South Korean services predominantly offered short-term subscription options, such as one-time, four-day, and one-week subscriptions. In addition, as mentioned above, these services offered a highly limited range of sizes for rental items.

In summary, with the exception of “Rent-It”, the number of brands, items, sizes, and clothes offered by South Korean sharing services was limited compared to foreign services, even though the cost of using South Korean fashion sharing websites was similar to that of foreign websites. However, we found that “14 days” and “Seinustar” had a competitive edge because they offered items serving a specific purpose; “14 days” offered South Korean users a selection of vacation clothes that could be worn at a travel destination, whereas “Seinustar” provided winter clothes for users visiting South Korea.

Moreover, looking at the success strategies of a small start-up, one of the most quickly rising and competitive South Korean fashion sharing service websites has two types of participants, renters and sharers, to help provide a wide range of products. Choosing the sharing model in which customers may rent and share items at the same time boosts the diversity of those products. It also encourages the users to participate actively by offering product support, which is the result of cooperation among various brands and new designers like that offered by “Rent the Runway”. Additionally, it has been actively advertising its COVID-19-safe laundry protocol to assure customer safety. Therefore, in case of South Korea, website management should be approached while considering two domains. First, when providing a wide range of items is difficult, the target range could be reduced to clothing for travel, special events, fashion items from designer brands (bag, shoes, accessories, etc.), and clothing popular among younger generation’s SNS (Social Network Service) photo uploads. Within this reduced target, the customer should be given more choices by providing variety in brands, sizes, and items. Second, various products could be provided through the sharing model in which customers may become lenders and sharers at the same time. Holding free events for those who are not familiar with sharing general fashion clothing or fashion items other than hanbok and dresses is also recommended.

3.1.2. Discount Rates and Product Types Offered by Fashion Sharing Websites

The product discount rate and number of items offered by South Korean and international fashion sharing websites are shown in Figures 2 and 3. Six of the eight South Korean websites (“Rent-It”, “Salon de Charlotte”, “Shirts Butler”, “The Open Closet”, “Weekly Shirts”, and “Seinustar”) did not list the retail price of their products, while the other two (“Sister’s Closet” and “14 days”) did. In contrast, apart from the United States’ “Gwynnie Bee” and Singapore’s “Style Theory”, the remaining 11 international websites listed the retail price of their products. Therefore, in the case of product discount rates, two South Korean and 11 international sites were surveyed and are shown in Figure 2. We found that, excluding Hong Kong’s “Yeechoo”, the mean discount rate of the aforementioned 11 websites was more than 70%, with the highest discount rate exceeding 90%. These results demonstrate that by using fashion sharing services, consumers can rent products they want at a more affordable price. If the consumer’s economic benefit is emphasized by revealing the original price to a sharer when sharing items, more consumers are likely to continue using the sharing service for rational consumption. Furthermore, with fashion

industry specialization and diversification of products, the lifecycle of trends grows shorter; consumers purchase a larger number of products, facing a financial burden to sustain such practices. However, the fashion sharing service is expected to not only reduce the financial burden on consumers, but also to solve environmental problems and facilitate rational consumption through sustainable fashion culture.

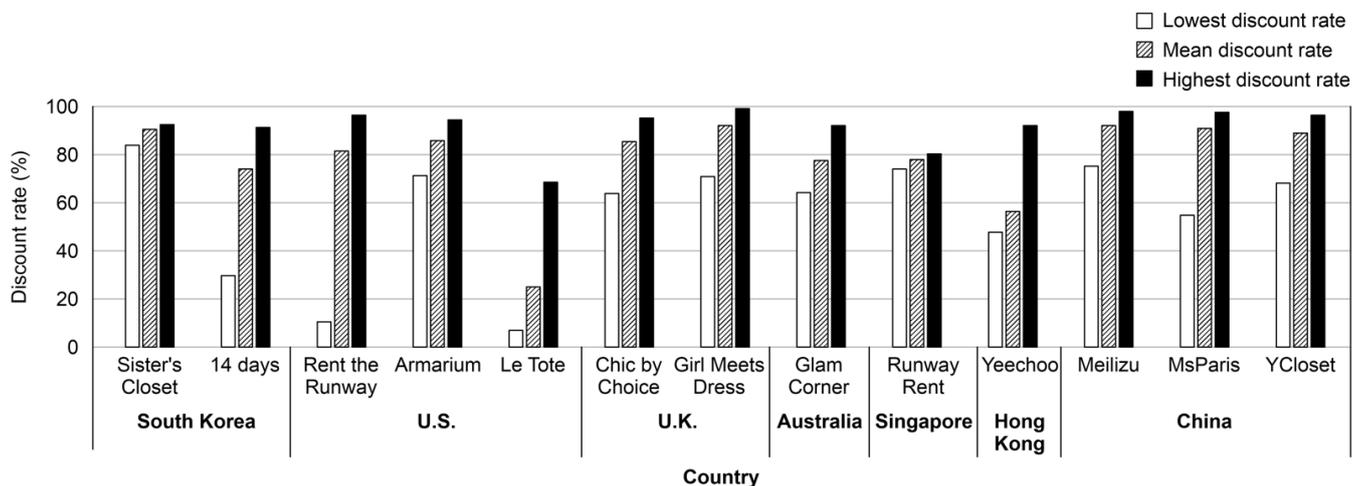


Figure 2. Discount rates of South Korean and foreign fashion sharing websites compared to retail prices.

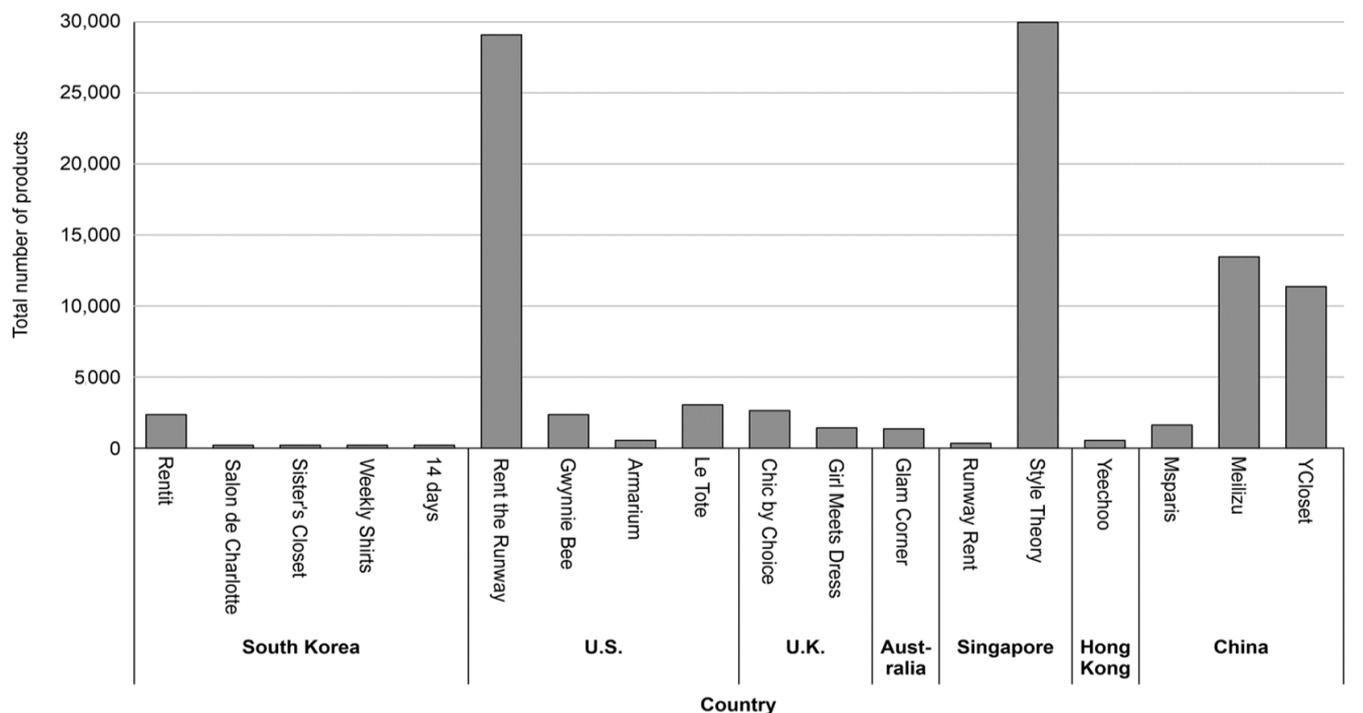


Figure 3. Total number of products offered by South Korean and foreign fashion sharing websites.

While reviewing the number of clothing products on offer, two South Korean sites (“Shirts Butler” and “The Open Closet”) were excluded from the website analysis because users could not select products and websites did not provide the number of products. The examination of the total number of products offered by each website (Figure 3) revealed that, with the exception of “Rent-It”, seven South Korean fashion sharing websites offered a much smaller selection of products than foreign websites did. The majority of foreign websites offered a large selection of products, ranging from 169 to 30,000 items (Figure 3). A more detailed examination revealed that the South Korean site “Rent-It” offered a selection

of approximately 2400 items, whereas the remaining websites offered a much smaller number of products, that is, generally under 150 items. The United States' fashion sharing service "Rent the Runway" offered a selection of approximately 28,774 products, while other U.S.-based websites incorporated a range of 260–28,774 products. Moreover, an investigation of foreign websites based in the United Kingdom, Australia, Singapore, Hong Kong, and China revealed that with approximately 30,000 products, Singapore's "Style Theory" offered the highest number of fashion products, followed by "Ms Paris" and "YCloset", with approximately 13,500 and 11,400 products, respectively.

With the latest and most trendy clothes and an abundance of shared resources, the U.S.'s "Rent the Runway", Singapore's "Style Theory", and China's "Ms Paris" and "YCloset" were some of the most successful websites providing fashion sharing services.

3.1.3. Changes in Fashion Sharing Websites Owing to the COVID-19 Pandemic

The sharing economy is to re-introduces the idea of redistributing products and services amongst the community, instead of relying on individual ownership. In particular, because the clothing is an item worn on the human body, there has been a change in the use of fashion sharing services after COVID-19. According to previous research [24], the use of shared services decreased due to unknown users and lack of clarity about sterilization and disinfection; therefore, many sites disappeared. Table 3 shows the results of the analysis of the changes in the factors of fashion sharing websites, the presence and absence of COVID-19 related phrases, and changes in the number of brands and items following the outbreak of COVID-19.

Table 3. Changes in fashion sharing websites due to the COVID-19 pandemic.

Country	Fashion Sharing Websites	Year Established	Extant in 2019	Extant in 2020	Includes COVID-19 Related Phrases	Number of Brands in 2020 (ΔB)	Number of Items in 2020 (ΔI)
South Korea	Rent-It	2017	○	○	×	66 (−17)	9
	Salon de Charlotte	2016	○	×	×	-	-
	Shirts Butler	2017	○	×	×	-	-
	Sister's Closet	2017	○	×	×	-	-
	The Open Closet	2011	○	○	○	-	8 (0)
	Weekly Shirts	2016	○	×	×	-	-
	14 days	2017	○	×	○	50 (−7)	4
	Seinustar	2016	○	×	×	-	-
The U.K.	Girl Meets Dress	2009	○	○	○	391 (+57)	6
	Chic by Choice	2014	○	×	×	-	-
The U.S.	Rent the Runway	2009	○	○	○	1861 (−20)	13 (0)
	Le Tote	2013	○	×	×	-	-
	Gwynnie Bee	2011	○	○	×	400 (+31)	7 (−1)
	Armarium	2015	○	×	×	-	-
Australia	Glam Corner	2012	○	○	○	197 (+51)	18 (0)
Singapore	Runway Rent	2015	○	○	×	4 (−1)	2 (0)
	Style Theory	2016	○	○	×	-	3 (−4)
Hong Kong	Yeechoo	2016	○	×	×	-	-
China	Meilizu	2015	○	×	×	-	-
	Ms Paris	2015	○	×	×	-	-
	YCloset	2015	○	○	○	641 (0)	11 (0)

ΔB : Changes in the number of brands in 2020 compared to 2019 = number of brands in 2020 – number of brands in 2019. ΔI : Changes in the number of items in 2020 compared to 2019 = number of items in 2020 – number of items in 2019. ○: Website in operation, ×: Website closed.

Changes in the factors of fashion sharing websites were divided into those three main categories. First, a survey on the existence of fashion sharing websites after the outbreak of COVID-19 revealed that the services of 13 of the 21 websites had ceased. Specifically, "Salon de Charlotte", "Shirts Butler", "Sister's Closet", "Weekly Shirts", "14 days", and "Seinustar" in South Korea; "Le Tote" and "Armarium" in the United States; and "Chic by Choice" in the United Kingdom; and sharing services such as "Meilizu" and "MsParis" in China, and "Yeechoo" in Hong Kong were closed. Meanwhile, websites in Australia and Singapore continued to operate. Among the websites that ceased operations, the U.S.'s "Le Tote" and South Korea's "The Open Closet" and "Seinustar" had to shut down due

to financial losses incurred during the pandemic. In general, following the COVID-19 outbreak, fashion-sharing websites experienced operational difficulties and stagnation. For example, “Rent the Runway”, which had been actively operating online and offline stores, decided to permanently close five offline stores (New York, Chicago, Los Angeles, San Francisco, and Washington, DC) due to loss of management during the COVID-19 pandemic [25].

Investigation of the presence and absence of COVID-19 related phrases (i.e., about laundry and hygiene) revealed that some of the websites included phrases such as “We are maintaining higher hygiene standards using measures such as washing and management methods”. A survey of the sites showed that two South Korean sites (“The Open Closet” and “14 Days”) and four overseas sites (“Rent the Runway” in the U.S., “Girl Meets Dress” in the U.K., “GlamCorner” in Australia, and “YCloset” in China) used COVID-19-related phrases. In 2019, the sites did not have laundry-related pop-up notices, and hygiene was not emphasized on the home page. In 2020, however, it was found that the sites included laundry- or hygiene-related notices in pop-ups and on the home page. An increasing number of sites mentioned COVID-19 and suggested countermeasures.

Since clothes come in direct contact with the human body and are shared by many people in the process of trying them out, most of these businesses have been equipped with a laundry management system to thoroughly manage hygiene. However, it was found that following the outbreak of COVID-19, they instituted a more systematic and thorough laundry process. For example, “YCloset” established a fully automatic smart cleaning and management central factory in cooperation with a well-known laundry and management brand. The company worked to assure customers that the items were clean and to ensure that the products were treated with increased care and that the employees who dealt with the products maintained distance while working and used hand sanitizers regularly, also noting that they had improved the accessibility of their handwashing facilities. In addition, “Rent the Runway”, “Girl Meets Dress”, and “GlamCorner” put up notices on their websites that their workplaces and public spaces were regularly disinfected. Furthermore, despite already having an elaborate laundry system, after the outbreak of COVID-19, “Rent the Runway” further strengthened and strictly managed its laundry process. It informed its customers that laundry bags were not reused within any 72-h period to ensure proper sanitization of the plastic bag’s surface. In addition, “Girl Meets Dress” recommended 26 different solutions (e.g., live streaming weddings, having long time gaps between weddings, and using outdoor spaces) after a wave of wedding cancellations due to the COVID-19 pandemic.

Finally, an analysis of the websites that survived the pandemic showed that the number of brands and items did not change significantly. However, it was confirmed that the number of brands varied depending on the website. The number of brands offered by “Girl Meets Dress”, “Gwynnie Bee”, and “GlamCorner” increased to 57, 31, and 51, respectively; however, other sites showed little or no significant change. For “Rent the Runway”, the total number of brands decreased by 20, but brand replacement was active: 281 new brands were created and 301 brands were removed. Despite the downturn faced by fashion sharing services due to COVID-19, “Rent the Runway” was able to replace brands because of its partnerships with various apparel companies. “Rent the Runway” provides not only a portion of rental revenue to brand partners after signing but also customer style preferences and consumer feedback on products. Thus, apparel brands can pre-release to the public on “Rent the Runway” and use it as a medium for reviewing customers’ reactions. In addition, new designers can advertise their clothes on such websites without actually advertising them. Therefore, the number of brands and items on “Rent the Runway” steadily increased [26]. In the case of “Rent-It”, the number of brands decreased, but the number of clothes by retained brands increased, in particular the number of earrings and bags from certain famous brands. At “Style Theory”, the number of items decreased, but the number of dresses increased from 17 to 50.

In sum, after the outbreak of COVID-19, most domestic and international fashion sharing websites equipped themselves with specialized laundry management systems, paid more attention to laundry and hygiene, and established strategies to build users' trust by creating promotional phrases related to the COVID-19 pandemic.

3.2. Usability and Accessibility of Websites Providing Fashion Sharing Services

The following two South Korean and three international websites were assessed to evaluate usability and accessibility: "Rent-It", "Sister's Closet", "Rent the Runway", "Gwynnie Bee", and "Girl Meets Dress." The results of the evaluation are listed below.

3.2.1. Usability of Fashion Sharing Services

As shown in Table 4, the evaluation process determined that there was a significant difference between the websites in "user's degree of recognizing the location of the information tree", "suitability of the website's visual imagery", and "consistency of each web page". A more detailed examination revealed that "Sister's Closet" (3.0 points) received the lowest rating for the degree to which the information tree's location was recognized and "Rent-It" (4.6 points) received the highest ($p < 0.01$). For "suitability of the site's visual imagery", "Gwynnie Bee" (2.9 points) scored the lowest and "Rent-It" (4.4 points) the highest ($p < 0.01$). Finally, for "consistency of each web page", "Gwynnie Bee" (3.5 points) and "Sister's Closet" (3.5 points) were rated the lowest and "Girl Meets Dress" (4.7 points) the highest ($p < 0.05$). Overall, the South Korean website "Rent-It" received an excellent rating. In other words, the website's users determined that they were able to easily recognize and continuously find the location of the information tree. In addition, they found that the visual imagery of the website (icons, graphics, texts, or indexes) was suitable. Furthermore, they reported that the website was easy to use because it maintained a sense of consistency. For instance, the website's information was distributed and structured in a consistent format on each web page.

Table 4. Evaluation of the usability of fashion sharing websites.

	Sister's Closet	Rent-It	Rent the Runway	Gwynnie Bee	Girl Meets Dress	F
	Mean (SD)					
User's degree of recognizing location of information tree	3.0a (±0.8)	4.6b (±0.5)	4.2b (±0.8)	4.0b (±0.9)	3.8b (±1.1)	4.714 **
Satisfactory site language support	3.6 (±1.2)	3.7 (±0.8)	2.9 (±1.2)	3.3 (±1.3)	3.3 (±0.9)	0.823
Suitability of site's visual imagery	4.1bc (±0.6)	4.4c (±0.8)	3.6ab (±0.8)	2.9a (±0.7)	3.5ab (±1.1)	4.847 **
Adequate provision of navigation tools	3.5 (±1.1)	4.4 (±0.7)	4.3 (±0.8)	4.1 (±0.9)	4.4 (±0.8)	1.876
Satisfaction with time taken to load each web page	4.6 (±1.1)	4.2 (±0.8)	3.5 (±1.4)	3.4 (±1.6)	4.0 (±1.4)	1.531
Consistency of each web page	3.5a (±1.2)	4.3ab (±1.2)	4.4ab (±0.8)	3.5a (±1.0)	4.7b (±0.7)	3.117 *
Consistent design and arrangement of colors for each web page	3.9 (±1.0)	4.6 (±0.7)	4.6 (±0.7)	4.3 (±0.8)	4.3 (±0.5)	1.442
Satisfaction with number of main menu and submenu items	3.2 (±1.1)	4.0 (±1.2)	3.8 (±0.9)	4.3 (±0.8)	3.4 (±1.2)	1.793
Satisfaction with size, font, and style of web page text	4.5 (±1.1)	4.3 (±0.9)	4.1 (±0.7)	4.0 (±0.9)	3.5 (±1.2)	1.452

* $p < 0.05$, ** $p < 0.01$. Duncan test result ($a < b < c$).

3.2.2. Evaluation of Fashion Sharing Services' Accessibility

As depicted in Table 5, the results of the evaluation demonstrated a significant difference between the websites in terms of the seven evaluative items "satisfaction with types of items", "preferred styles", "diversity of sizes", "satisfaction with category classification", "convenience of product descriptions", "satisfaction with the way products are listed", and "provision of images with clothes being worn". For website users' "satisfaction

with types of items”, “Girl Meets Dress” (8.7 points) and “Rent the Runway” (9.3 points) scored the highest points ($p < 0.001$), while “Sister’s Closet” (6.7 points), “Girl Meets Dress” (7.1 points), and “Rent the Runway” (7.6 points) were rated quite high for “large selection of preferred styles” ($p < 0.05$). For “diversity of sizes”, “Gwynnie Bee” was rated the highest with 8.2 points ($p < 0.05$), and for “satisfaction with category classification”, “Rent the Runway” (8.9 points) and “Girl Meets Dress” (9.0 points) received high scores ($p < 0.01$). For “convenience of product descriptions”, “Gwynnie Bee” (6.0 points) received a low score ($p < 0.05$), while “Rent the Runway” (8.5 points) and “Girl Meets Dress” (8.7 points) received high scores for “overall satisfaction of users” and “satisfaction with the way products are listed” ($p < 0.05$).

Table 5. Evaluation of the accessibility of fashion sharing websites.

	Sister’s Closet	Rent-It	Rent the Runway	Gwynnie Bee	Girl Meets Dress	F
	Mean (SD)					
Satisfaction with types of products	5.6 (±1.6)	5.3 (±2.7)	9.3 (±1.3)	6.9 (±2.3)	8.7 (±1.7)	8.179 ***
Large selection of preferred styles	6.7 (±2.1)	3.7 (±3.4)	7.6 (±2.1)	5.8 (±2.0)	7.1 (±2.6)	3.800 *
Diversity of sizes	5.6 (±2.8)	5.1 (±2.9)	7.6 (±2.0)	8.2 (±2.3)	7.5 (±2.0)	3.213 *
Suitability of rental costs	6.9 (±2.4)	8.1 (±1.9)	6.7 (±2.2)	6.9 (±2.4)	6.6 (±2.2)	0.749
Satisfaction with overall site atmosphere	8.4 (±1.5)	7.0 (±2.2)	7.4 (±1.7)	6.7 (±1.8)	6.0 (±1.8)	2.388
Satisfaction with category classification	5.6 (±2.3)	6.8 (±2.1)	8.9 (±1.4)	7.8 (±2.0)	9.0 (±1.2)	5.987 **
Satisfaction with product detail description	5.2 (±2.2)	7.4 (±2.0)	7.1 (±1.7)	5.8 (±1.9)	6.2 (±2.0)	2.140
Convenience of product descriptions	7.7 (±2.9)	8.9 (±1.7)	8.2 (±1.8)	6.0 (±2.3)	8.1 (±1.5)	2.629 *
Satisfaction with the way products are listed	7.2 (±1.9)	6.0 (±3.1)	8.5 (±1.5)	7.7 (±1.4)	8.7 (±0.9)	3.174 *
Provision of images with clothes being worn	6.3 (±3.1)	3.1 (±3.3)	8.3 (±1.6)	5.4 (±2.9)	7.9 (±1.9)	6.283 ***
Presence of user reviews	7.6 (±2.6)	6.5 (±2.2)	7.5 (±2.9)	7.3 (±2.2)	6.0 (±2.5)	0.784
Satisfaction with laundry and sterilization services	6.7 (±2.8)	5.4 (±2.2)	5.3 (±1.9)	5.4 (±2.1)	4.8 (±2.2)	0.962

* $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$.

Finally, for “provision of images with clothes being worn”, “Rent the Runway” (8.3 points) received the highest score ($p < 0.001$). Overall, the site received an excellent rating. In other words, the users of “Rent the Runway” found it easy to find products because the website offered diverse products and sizes and afforded users a wide range of choices by providing them with a large collection of styles. Furthermore, the website’s categories and products were neatly classified and included detailed product descriptions as well as a large number of user reviews with pictures. This facilitated the users’ selection process.

In conclusion, “Rent-It” showed the best usability in language, page consistency, and directory information, and “Rent the Runway” showed higher accessibility in terms of product satisfaction, categorization, and use of images. Therefore, in designing a local fashion rental site, “Rent-It” is a good reference for language, page consistency, and directory information trees, and “Rent the Runway” for product categorization and image usage. For fashion products, it is important to present aesthetically pleasing visual information, make product information easy and fast to get, and provide a simple way to purchase items. Therefore, usability and accessibility is expected to improve if images are provided from various angles with high-definition color and if websites are constructed

in a well-organized manner with appropriate categorization, page consistency, and an easy-to-understand information tree.

Figure 4 shows the mean time it took users to select a dress on the aforementioned websites. The mean time differed by user, ranging from 3.0 ± 1.0 min to 22.4 ± 4.5 min. However, when users were asked to select a dress on their preferred website, 7 out of 10 users chose their desired product very quickly. “Rent the Runway” (RR) was preferred by most users (five), followed by “Rent-It” (RI) (three) and “Girl Meets Dress” (G) (two). Further, people preferred websites with efficient usability and accessibility along with the availability of preferred products. The results indicated a general tendency in website preference despite individual differences in preferred websites and time taken in choosing clothing; users spent less time when the site had higher usability, accessibility (user satisfaction), and users’ favored items. “Rent the Runway (RR)” and “Rent-It (RI)” had above standard usability and accessibility and participants took minimum amounts of time in making their final decisions even though these websites generally had more categories and products. Therefore, when rental circumstances and target items are given, measuring the time spent by participants using the site seems to be an effective method to evaluate usability and accessibility.

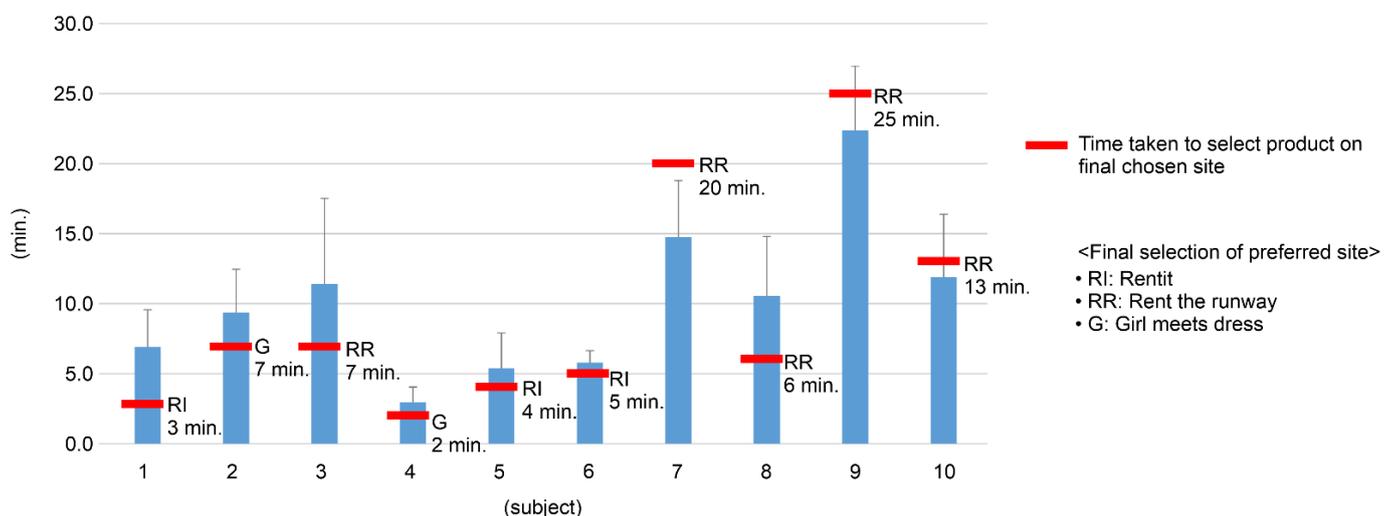


Figure 4. Mean time taken to select a dress per user and the time taken on the preferred website.

4. Conclusions

In this study, we analyzed 21 South Korean and international fashion sharing websites to provide information on possible alterations that can be made to such websites to adapt to the new normal brought about by the COVID-19 pandemic. In addition, the usability and accessibility of these websites were examined from the perspective of consumers to propose methods for improving the efficiency of fashion sharing websites.

The results show that, considering the characteristics of the fashion sharing service websites, it is highly advisable to have a diverse range of products; however, the majority of the South Korean sites have limited capital or recruit sharers to start the rental service. Considering these circumstances, our findings suggest focusing on the following aspects to build an active rental site.

First, based on the consolidated results of the various analyses, it can be concluded that increasing the number of brands, items, and clothes to match international websites may not be the best way to promote South Korean fashion sharing websites among their customers. It may be more fruitful to include a diverse range of products under one category that serves a specific purpose.

Second, it was determined that fashion sharing services must provide a diverse range products. Consequently, it is exceedingly difficult for startups with limited capital to yield

a profit because the cost of purchasing products is extremely high. The primary reason behind a major South Korean company terminating its fashion sharing service two years after its establishment was its inability to supply diverse products.

Therefore, it is important to discover new methods to stimulate South Korea's fashion sharing industry. One way to do this is to secure a diversity of products within the product range for special purposes by focusing on specific domestic needs such as dress shirts for me ("Shirts Butler") or vacation clothes ("14 days"). Another way is to secure a variety of products ("Closetshare") without large-scale funding. Specifically, a possible method may be to create a service with two types of members: renters and sharers. In this sharing model, customers simultaneously play the role of renters and sharers who supply the products themselves. This could solve the problem of offering diverse products by creating customer profiles that include personal belongings they do not use.

The third suggestion for building an active rental site is to improve the website itself. In general, South Korean sharing services were rated slightly lower than foreign sharing services in terms of accessibility and usability. Therefore, South Korean websites must diversify the types and sizes of clothing to increase user satisfaction, systematically and consistently classify product categories, and arrange a large number of items by type so that they can easily be found. Furthermore, websites should include images from different angles of models wearing items to improve accessibility and promote the use their services.

This study is significant because it provides an in-depth analysis of fashion sharing websites before and after the outbreak of the COVID-19 pandemic. Our results can be used to develop fashion sharing websites suitable for the new normal ushered in by the pandemic. However, this study had a few limitations. Although in this study, we investigated the brands, items, and sizes offered by the websites, data on multiple items of identical products and items of clothing not provided by the websites were excluded from the analysis. Furthermore, a limited number of South Korean and foreign websites providing fashion sharing services were analyzed. Consequently, it is suggested that follow-up research be conducted on diverse websites in order to collect more data on fashion sharing websites.

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