

# Insights Consumer Survey

Survey data from 3000 consumers from Finland, France, and Spain, collected in March 2023

# Sociodemographic characteristics of the sample

Variable	Percentage	
Country cluster	Finland	33.2
	France	33.3
	Spain	33.4
	Other	0.1
Gender	Female	52.3
	Male	47.4
	Non-Binary	0.2
Income (yearly)	0-9 999€	13.1
	10 000-24 999€	32.6
	25 000-49 999€	31.6
	50 000-99 999€	9.3
	100 000€ or more	1.5
	Not answered	12.0
Education	High-School	44.3
	Bachelor's degree	31.3
	Master's degree	15.6
	PhD or higher	5.3
	Not answered	3.5
Living location	Rural	20.0
	Town	34.7
	City*	45.3

# Important factors for garment purchasing decision

Most important factor for purchasing decision:

1. Price
2. Quality and durability
3. Style

Least important factor for purchasing decision:

1. Brand
2. Uniqueness
3. Effect on my image

# Most important information on textile products

1. Care instructions
2. Material content and composition of the product
3. Manufacturing country of the product
4. Country of origin of the textile materials
5. Quality test results (e.g. wash times)

## **Consumption behaviour – Sharing platforms**

Selling clothes on online platforms? 46% Yes; 54% No

Interested to sell in the future? 61% Yes; 39% No

Purchasing clothes from online platforms? 39% Yes; 61% No

Interested to buy in the future? 55% Yes; 45% No

## **Consumption behaviour – Rental**

Ever used clothing rental service? 11% Yes; 89% No

Interested in using in the future? 23% Yes; 76% No

Interested in renting which textile products? Mostly formal wear

## Consumption behaviour – Second-hand

Ever bough second-hand products? 43% Yes; 57% No

Interested in buying in the future? 58% Yes; 42% No

## Consumption behaviour – Textile products made from recycled fibres

Ever bough textiles made from recycled fibres? 36% Yes; 24% No; 40% I don't know

Interested in purchasing them in the future? 80% Yes; 20% No

Do you know where you can purchase them? 34% Yes; 66% No

How much should a recycled textile product cost compared to a similar product made from non-recycled fibre? 7.5% More; 54% Same; 39% less

# **What is the biggest obstacle when it comes to purchasing textile products made from recycled materials?**

- Not available/ not knowing where to get them
- Cleanliness
- Quality
- Price

## Interesting quotes

"I doubt their hygiene and cleanliness" – Female, Finland, 60

"I have never considered it. I don't know how long a recycled garment can last and it is one of the most important aspects for me when buying clothes" – Male, Spain, 50

"They are often made from synthetic fibres and chemicals have been used in their production. – Female, Finland, 38

"One doubts whether they are worth their price in terms of their environmental effects and properties, or whether the recycling process consumes an unreasonable amount of energy and water. – Female, Finland, 41



# **What is the biggest obstacle when it comes to textile recycling (textile waste collection for textile recycling)?**

- Laziness/effort involved in taking textile waste to collection bins
- Lack of collection bins
- Not enough information how to recycle textile waste
- No (financial) gain from it
- Distrust / Lack of Transparency

## Interesting quotes

“Lack of good recycling services. I don’t like the fact that clothes from recycling boxes are sold at a high price, and the proceeds are not used according to my values, or the clothes might end up on the other side of the globe as trash.”  
– Female, Finland, 38

“Are we sure that the textiles will be recycled and not sent to poor countries?” –  
Female, France, 57

“The fibres recycled in France go back by boat to Asia to be woven and then come back. The ecological balance is not exceptional with all this transport.” –  
Male, France, 44

“That they are going to make new clothes with those [discarded] products, which on top of that is going to be more expensive than the original. We pay more than twice for the same clothes.” – Spain, Male, 36

# Country comparison of obstacles to textile recycling (combining both questions)

Themes	Codes	Finland		France		Spain	
		N=	In %	N=	In %	N=	In %
Unawareness of textile recycling	Not aware where to get recycled products/of the textile recycling process	30	8.2	13	6.6	21	6.3
	<b>Total</b>	30	8.2	13	6.6	21	6.3
Textile waste collection issues	Laziness/effort involved	103	28.2	32	16.2	30	9.0
	Lack of collection bins/lack of information	172	47.1	86	43.6	188	56.5
	No gain from it	2	0.6	4	0.6	7	2.1
	<b>Total</b>	277	75.9	122	61.9	225	67.6
Lack of transparency of recycling process	Distrust/lack of transparency	14	3.8	33	16.8	46	13.8
	Suspecting chemical use/environmental impact	5	1.4	8	4.1	6	1.8
	<b>Total</b>	19	5.2	41	20.8	52	15.6
Problems with end-product of textile recycling	Cleanliness	0	0	0	0	6	1.8
	Quality	11	3	7	3.6	10	3.0
	Price	25	6.9	14	7.1	19	5.7
	<b>Total</b>	39	10.7	21	10.7	35	10.5

# Conclusions

- The learnings highlight a need to enhance communication about separate textile waste collection efforts, ensuring consumers are more aware and knowledgeable of existing solutions, as well as educating consumers on how to dispose their textile waste correctly.
- Raising awareness among consumers could be achieved through nationwide initiatives that shed light on specific textile collection methods.
- Furthermore, transparency includes disclosing the environmental impact of the recycling process. It also appears that consumers are worried about hazardous chemicals use. Transparency may also have an impact on how consumers perceive end-products of textile recycling. Negative perceptions related to quality, cleanliness and price can be handled through information sharing about the recycling process, especially sorting and the recycling technology.
- Findings also included that if the recycling process happens in the consumers' home country, it is a bigger incentive for them to partake in the process – either through disposing their textile waste correctly or by purchasing textile products made from recycled fibres. Knowing that (at least part of) the process happens in their home country, or within the EU, can also help reducing distrust.