

A Synthesis of Circular Economy Behavioural Insights 2022-2025

CIRCULAR ECONOMY PROGRAMME

The Driving Force for Ireland's Move to a Circular Economy

epa Environmental Protection Agency

Ipsos B&A

Section 1: Executive Summary

Research Background

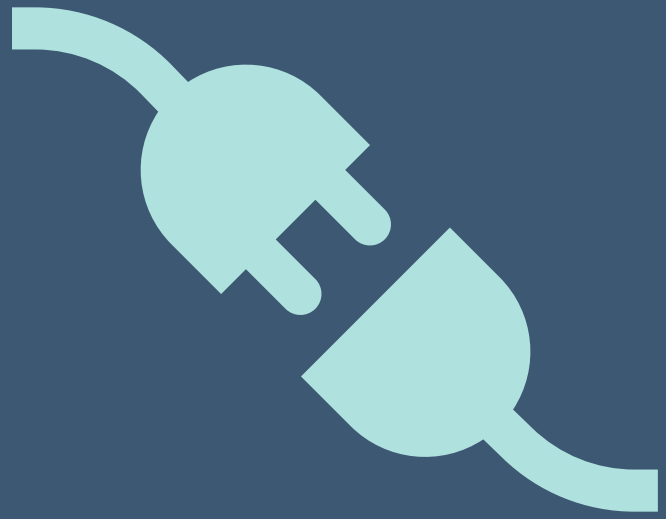
The EPA's Circular Economy Behavioural Insights Research generates valuable evidence on priority materials and sectors for the circular economy including textiles, food, reuse & repair, plastics, and construction (here). The research findings and insights inform knowledge gaps, policy development and implementation, and inform stakeholders, national awareness campaigns and intervention development.

This report provides a synthesis of consumer attitudes and behaviours across key circular economy topics, drawing on insights from a multi-year programme during which the EPA contracted Ipsos B&A to carry out quantitative and qualitative research. The report identifies key insights, motivators, barriers and opportunities to support a transition to a circular economy.

Textiles	Food Waste	Repair	Reuse	Packaging
Qualitative & Quantitative Research (2024)	Quantitative & Qualitative Research (2023-2025)	Quantitative Surveys (2022 & 2024)	Quantitative Survey (2023)	Quantitative Survey (2024)

The Overarching Narrative

A central narrative emerges from the research: **While Irish consumers show some baseline participation in certain circular activities, a series of consistent gaps constitute the primary barriers to broader & deeper participation.**



Qualitative research can identify how **these gaps can be bridged. For example, in relation to food management and reduction, by focusing on small, manageable behavioural changes.**

Primary Motivators & Barriers

Throughout the circular economy research findings, certain key motivators and barriers have been more consistent than others. Although it is more complex depending on the material in focus.

Primary Motivator:

Financial Savings. This is consistently the most powerful lever for change.



Primary Barriers:

The Capability Gap: A "competency gap" in practical skills, knowledge, and tools, set against a broader culture of consumerism that pushes for new purchases.



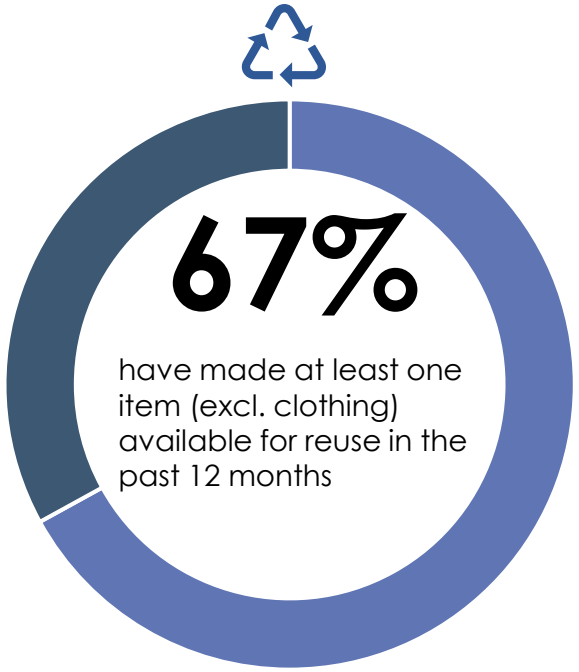
The Opportunity Gap: A "convenience gap" where the infrastructure and product design make the circular choice difficult.



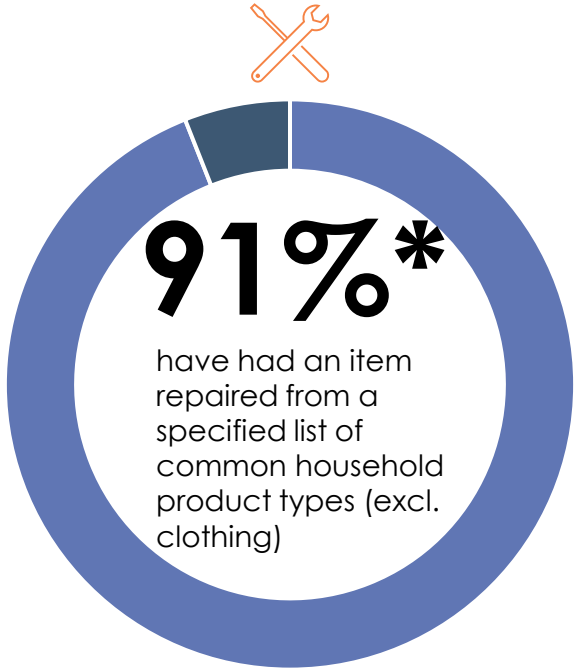
Section 2: The Big Picture - The Public Mindset on the Circular Economy

Baseline Engagement & Concern

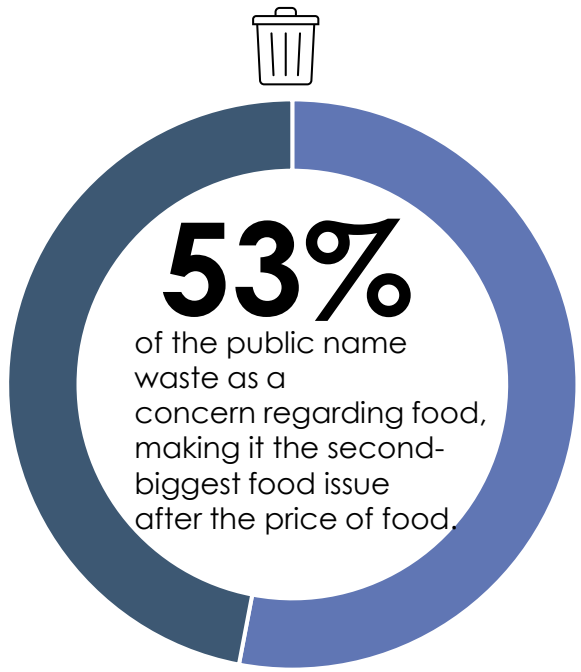
For certain circular economy topics like reuse, repair, and food waste, there is a baseline of public concern and participation. However, this engagement doesn't always translate into deeper, more impactful actions.



Source: *National Reuse Survey 2023*



Source: *Repair National Survey 2024*



Source: *Food Waste National Survey 2024*

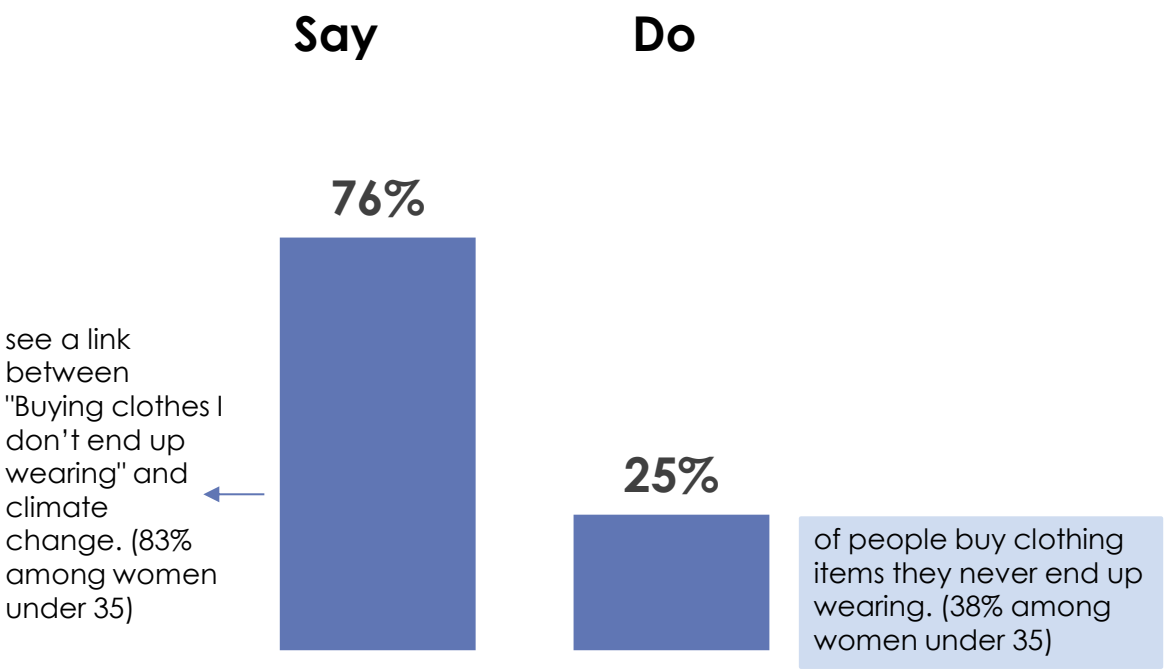
Reuse and Repair figures are greater still when inclusive of clothing and textiles

*Based on a list of 12 common household product types including large appliances and electronics

The "Say-Do" Gap: Good Intentions Don't Always Translate to Action

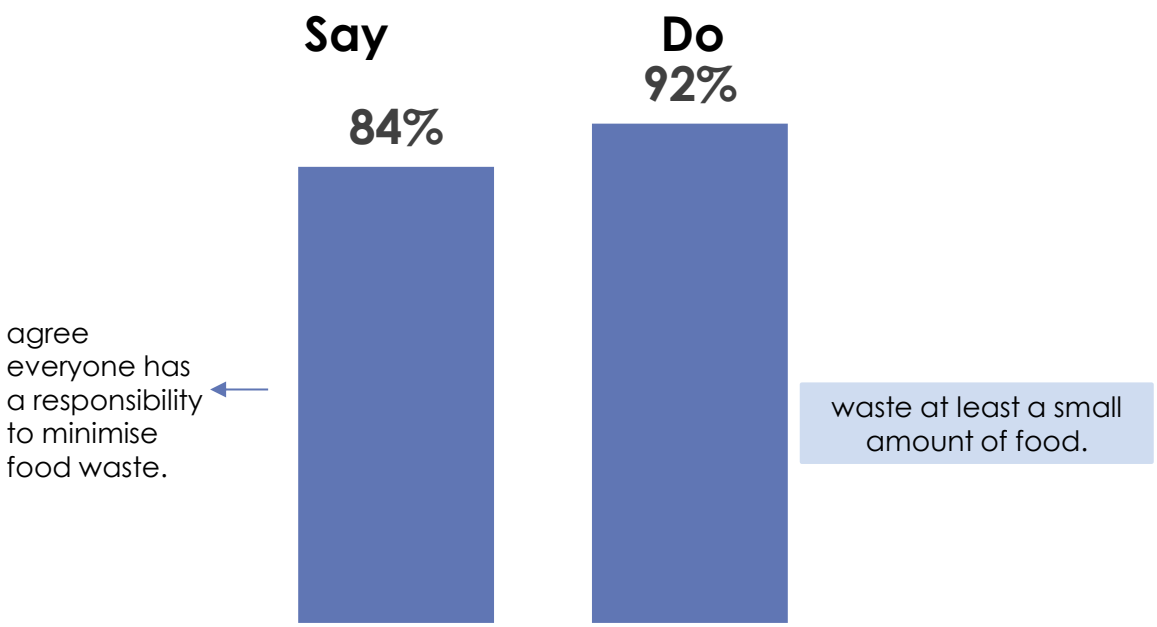
A consistent theme across the research is the gap between what people say they value and what they actually do.

Comparison 1: Textiles



Source: *Textiles National Survey 2024*

Comparison 2: Food Waste

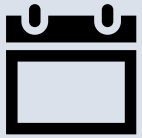


Source: *Food Waste National Survey 2024*

The Scale of Consumption

The 'Say-Do' gap in textiles is particularly significant because clothing purchases are a frequent occurrence. The market is characterised by frequent purchasing and substantial spending, which amplifies the impact of every unworn item.

High Frequency



46%

…of Irish adults buy clothes 'frequently' (at least once a month).

Source: *Textiles National Survey 2024*

High Spend



€66

…is the average monthly spend per person on clothing.

Source: *Textiles National Survey 2024*

A Concentrated Demographic



77%

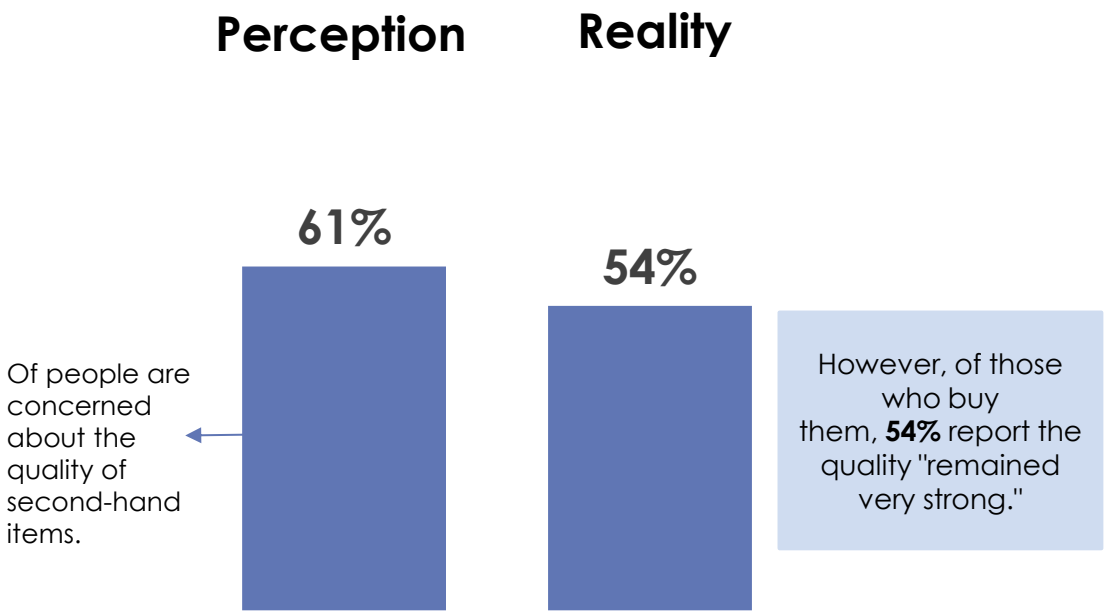
…of women under 35 purchase a 'lot' or 'fair amount' of clothes from low-cost shops, highlighting the core of the fast fashion market.

Source: *Textiles National Survey 2024*

The "Trust" Gap: Scepticism Persists, Even Against Positive Experience

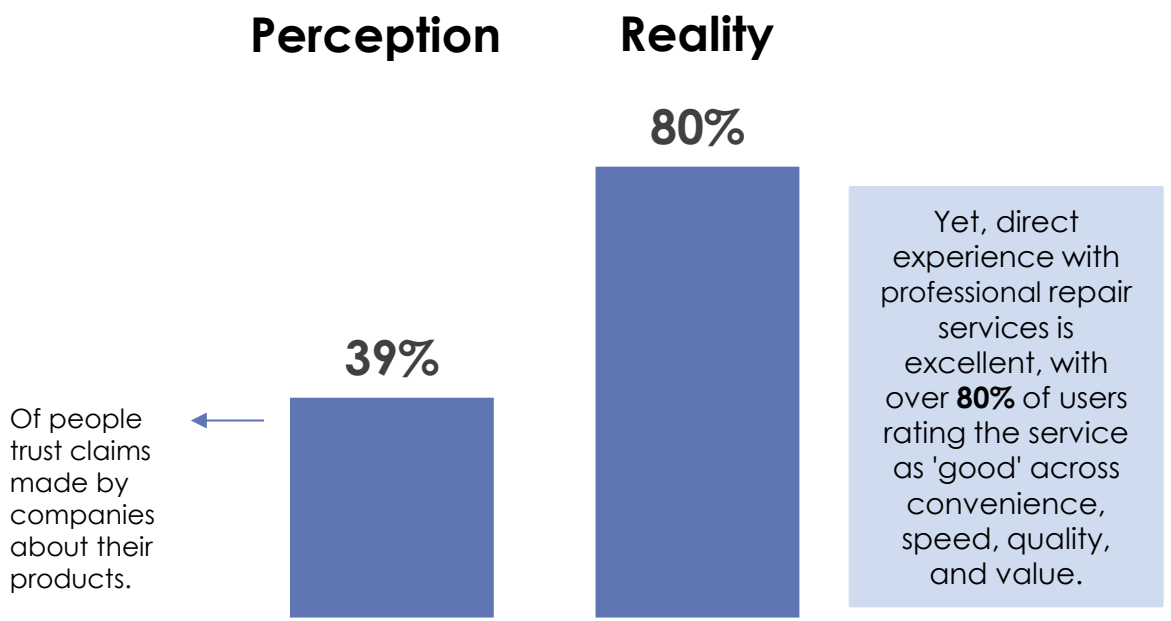
Consumers are often sceptical of the quality and reliability of second hand goods and repair services, creating a barrier to participation.

Comparison 1: Second Hand Goods



Source: *National Reuse Survey 2023, Part 2*

Comparison 2: Professional Repair



Source: *National Repair Survey 2022*

Section 3: The People - Key Consumer Profiles

Introduction to Consumer Profiles

The research allows the synthesis of data across multiple studies to create actionable profiles. Understanding *who* these consumers are is key to designing effective interventions.

Family



Young Adult



Elderly Couple



The Young Adult (<35) - Two Sides to the Coin

This group is a paradox: the highest consumers and wasters in specific areas like textiles and food, but also the most open to new models and eager to learn new skills.

Side 1: The Challenge

- **43%** of women <35 buy clothes they wear only a few times, compared to the 25% national incidence. (*Source: Textiles National Survey 2024)*
- **38%** of women <35 buy clothes that they never end up wearing. (*Source: Textiles National Survey 2024)*
- **Under-35s are more likely to waste food than older adults**, with younger adults showing lower confidence in food management skills, particularly around food storage and planning. *(Source: Food Waste National Survey 2024)*
- **Strong social pressure and fear of outfit repetition drive overconsumption**. Young women describe fashion as closely tied to identity, with trends, social media and FOMO creating pressure to continually purchase new items rather than rewear existing clothes. (*Source: Textiles Qualitative Research 2024)*
- **Many purchases are aspirational rather than practical.** Clothing is often bought for a future version of oneself, specific occasions or imagined lifestyles, resulting in wardrobes full of items that remain unworn or are only worn once or twice. *(Source: Textiles Qualitative Research 2024)*

The Young Adult (<35) - Two Sides to the Same Coin

This group is a paradox: the highest consumers and wasters in specific areas like textiles and food, but also the most open to new models and eager to learn new skills.

Side 2: The Opportunity

- **75%** of this group would like to learn at least one new repair skill. *(Source: Repair National Survey 2024)*
- Most aware of digital platforms like iFixit (**24%** awareness). *(Source: Repair National Survey 2024)*
- More open than older groups to **second-hand fashion**, clothing swaps and borrowing, particularly when these options still provide novelty, self-expression and value. *(Source: Textiles Qualitative Research 2024; National Reuse Survey 2023)*
- *Respond positively to interventions that help them **get more from existing wardrobes**, particularly mix-and-match styling inspiration, wardrobe reviews and rewear guidance. (Source: Textiles Qualitative Research 2024)*

The Gender Divide: Different Skills, Different Entry Points

Repair and reuse behaviours are strongly segmented by gender. Various circular skills exist within the population, but they manifest differently.

Female Profile:
83% have sewing/stitching skills to repair clothes. (*Source: Repair National Survey 2024*)

Women are significantly more engaged in clothing repair, reuse and donation activities than men. Women aged 50+ are the group most likely to bring unwanted clothes to charity shops (77%). (*Source: Textiles National Survey 2024)*

Male Profile:
Dominate the "High Repair Group" (**69%** of the group are men). (*Source: National Repair Survey 2022*)

Higher skills in carpentry (**49%** of men) and vehicle repair (**26%** of men). (*Source: Repair National Survey 2024*)

Lifestage & Household: How Daily Life Shapes Waste (Part 1)

Household composition is one of the most powerful predictors of behaviour, especially for food waste.

Young Families (0-4 yrs): "The Battle for Control"

Insight: Parents of young children are in a constant state of managing unpredictability. Their focus on providing "good food" and the chaos of daily life often leads to over-provisioning and waste. Convenience is king.

Food Waste: "Picky eaters and the 'insurance' lunchbox packed alongside hot school meals create significant waste."

Data:
- 34% of this group report moderate/large waste of fresh fruit & vegetables.
- Key drivers of household food waste include changing plans (53%) and leftovers not being used in time (51%).

Packaging: "This group is highly reliant on the convenience of pre-packaged goods."
Data: They show a higher preference for pre-packaged fruit & veg (**44%**) compared to other lifestages.

Sources: *Single Use Packaging Survey 2024; Food Waste Qualitative Research 2025; Food Waste National Survey 2024*

Lifestage & Household: How Daily Life Shapes Waste (Part 2)

Household composition is one of the most powerful predictors of behaviour, especially for food waste.

Families with Older Children: "Fragmented Mealtimes"

Insight: Life is dictated by the packed, staggered schedules of teenagers. This leads to fragmented mealtimes, a need for grab-and-go convenience, and a household heavily influenced by youth trends and social pressures.

Food Waste: "Staggered schedules from sports and activities make meal planning difficult, leading to reliance on 'just-in-case' convenience foods and larger-than-needed portions to feed hungry teens." Quantitative research has shown that the top reasons people waste food are that it "passes the 'Use-By' date" (**67%**) and that "plans change so we don't get to use it" (**53%**).
Source: Food Waste National Survey 2024; Food Waste Qualitative Research 2023 - 2025

Textiles: "This household is on the front line of fast fashion pressure."
The 16-23 age group feels immense pressure from social media and trends not to re-wear outfits, driving high-frequency purchasing.
Source: Textiles Qualitative Research 2024

Repair: "Electronics are a key repair category as the household fills with personal devices."
The 16-34 age group (encompassing teens and young adults in these homes) shows the highest incidence of repairing electronics (**50%**). (Source: Repair National Survey 2024)

Lifestage & Household: How Daily Life Shapes Waste (Part 3)

Household composition is one of the most powerful predictors of behaviour, especially for food waste.

Empty Nesters/Older Households: "Best Practice"

Insight: This group often represents a "best practice" model. Their established routines, planning skills, and experience lead to lower waste and higher participation in traditional circular activities like repair and donation.

Food & Packaging: "They are master planners for smaller households."
This group reports the best food management skills and a strong preference for loose fruit & veg to control quantity (44% preference for loose in bags).
Source: Food Waste National Survey 2024; Single Use Packaging Survey 2024.

Reuse: "They are champions of traditional reuse channels."
Women 50+ are the group most likely to bring unwanted clothes to a charity shop (**77%**).
Source: *Textiles National Survey 2024*

Lifestage & Household: How Daily Life Shapes Waste (Part 4)

Household composition is one of the most powerful predictors of behaviour, especially for food waste.

Single-Person Households: "The Food Waste Opportunity Gap"

Insight: Single-person households often face a mismatch between individual needs and how food is sold, packaged and promoted.

Food Waste: 59% of consumers buy larger packs than they need because smaller options are unavailable.

Opportunity: Smaller pack sizes, better portion guidance and food-planning supports could help single-person households reduce waste without relying solely on behaviour change.

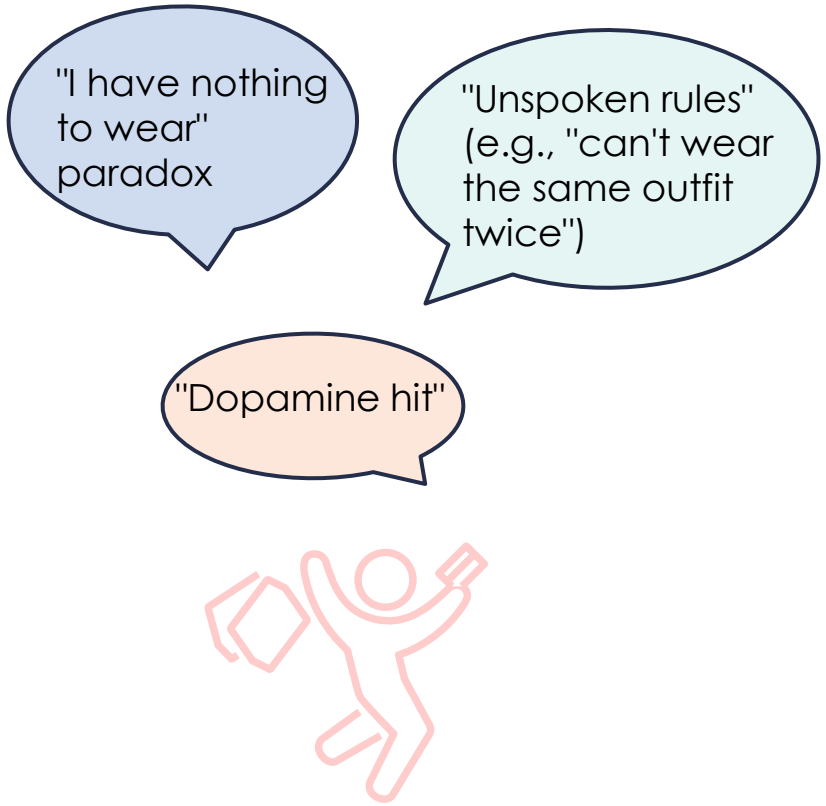
Source: *Food Waste National Survey 2024*

Section 4: The Behaviours - A Deep Dive into What People Do

Case Study: The Emotional World of the Modern Textile Shopper

For young women, textile consumption is driven by emotional rewards and social pressure, not just functional need. There is also an aspirational appeal driving unworn purchases, buying clothes for a future self, but never end up wearing them.

Qualitative Evidence:



- **Opportunity:** Promote circular alternatives that provide novelty without new consumption, such as styling, rewearing, clothing rental, swapping, and borrowing (a common practice among 16-21 year olds).

Interventions that showed the greatest promise:

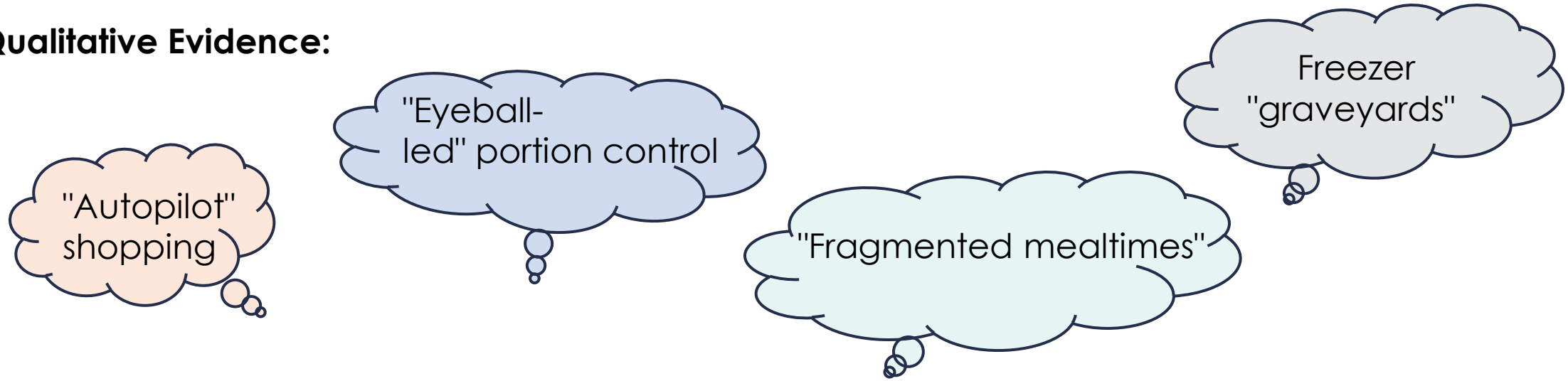
- **Wardrobe reviews and organisation** help consumers rediscover forgotten clothing, reduce duplicate purchases and make rewear easier.
- **Mix-and-match styling** inspiration increases confidence in creating new outfits from existing clothes and was particularly appealing to younger consumers.
- **Pause-before-purchase** techniques (e.g. "Wait 3 Days") can disrupt impulse buying by creating a moment for reflection before purchasing.
- Encouraging consumers to **question discount-driven purchases** helps counteract the influence of promotions and reduce unnecessary buying.

***Source**: Textiles Qualitative Research 2024*

Case Study: Food Waste Hiding in Plain Sight

Household food waste is the cumulative effect of many small, unnoticed daily habits and is the cumulative effect of many small, unnoticed daily habits and underdeveloped food management skills. With around 220,000 tonnes of household food waste annually, we know that people are underestimating their levels of food waste.

Qualitative Evidence:



Source: Food Waste Qualitative Research 2023-2025

- **Opportunity:** The act of tracking food waste makes the problem visible and tangible, triggering a 'point of recognition' that motivates action and openness to small, simple changes.

Repair & Reuse: A Nation with an Openness to Fixing and Re-homing

The public has an openness to repair and reuse for certain products, but this is often informal and hampered by practical barriers.

Quantitative Evidence:

Getting it repaired:

91% of adults have had a common household item* repaired (excl. clothing)

67% of adults have made an item available for reuse in the past 12 months. (excl. clothing)

Source: *Repair National Survey 2024; National Reuse Survey 2023*

Doing it themselves:

65% of adults have repaired clothes (this rises to 83% among women)

64% of adults have done small home DIY repairs.

Source: *Repair National Survey 2024*

- **Opportunity:** Men show higher engagement with electronics repair, while women dominate textile repair. This presents a clear opportunity for targeted interventions.

*Based on a specified list of common household product types.

Section 5: Motivators, Barriers and Opportunities

Primary Motivator: The Power of the Wallet

Financial savings are consistently the most powerful lever for changing consumer behaviour

64% cite "cost saving" as the top trigger for buying second hand.

Source: *National Reuse Survey 2023.*



68% say "cost of repair being less than buying new" is the top encouragement to repair.

Source: *National Repair Survey 2022, Part 4.*



57% say that the economic value of food waste makes the biggest impression on them.

Source: *Food Waste National Survey 2024.*

The #1 Barrier: The Capability Gap

People often cannot act on their good intentions because they lack the practical ability (skills, knowledge, tools). This is amplified by a culture of consumerism and social media driving new consumption.

45% of people would like to repair/alter clothes but don't know how.

Source: *Textiles National Survey 2024*

49% lack the required equipment to repair clothes.

Source: *Textiles National Survey 2024*

37% rate their food management skills as "good" or "very good."

Source: *Food Waste National Survey 2024*

The #2 Barrier: The Opportunity Gap

The physical environment and the design of products & services often create barriers to positive behaviours.

72% would keep textiles out of household bins if a collection bank was closer.

Source: *Textiles National Survey 2024*



59% of food shoppers buy bigger packs than they need because a smaller
one isn't available.

Source: *Food Waste National Survey 2024*



89% of people believe manufacturers are primarily responsible for making products easier to repair.

Source: *National Repair Survey 2022*



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