

A graphic on the left side of the slide featuring concentric circles with arrows pointing clockwise, symbolizing a circular economy. The circles are colored in shades of blue, green, and orange.

# TEXTILES: CIRCULAR RETAIL PROPOSITIONS NATIONAL SURVEY 2022

EPA Circular Economy Programme and B&A

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



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**B&A**  
RESEARCH  
& INSIGHT

## Overview of survey

Behavioural insight is a foundation of the EPA's Circular Economy Programme, providing evidence to inform policy, to inform behavioural change interventions and to inform awareness campaigns.

The EPA contracted Behaviour & Attitudes (B&A) to carry out this quantitative research which is a nationally representative survey of Irish citizens to evaluate their awareness, current use, influencing factors and interest in circular textiles retail propositions.

Four circular textiles retail propositions were surveyed: take-back schemes for clothing, rental service, clothing items made from recycled fibres and brands selling second hand clothing. The fieldwork for this online survey was carried out in November 2022 and achieved a nationally representative sample of 1,069 adults ages 16+.

The survey topic areas are presented in three sections:

**Part 1:** Awareness and Use of Circular Retail Propositions

**Part 2:** Influencing Trial of Circular Retail Propositions

**Part 3:** Likelihood to Trial Circular Retail Propositions



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## Definitions of the Circular Textiles Retail Propositions

### TAKE-BACK SCHEME

A number of clothing retailers have a take-back scheme for unwanted clothing and textiles in place in their stores.

### RENTAL SERVICE

A rental service for occasion wear and designer items is offered by a number of Brands and clothing retailers online and in-store.

### RECYCLED FIBRES

A number of Brands are selling a range of clothing and textile items made from recycled fibres.

### BRANDS SELLING SECOND-HAND

Some Brands have an online shop to sell good condition second hand clothing items from their brand range (e.g. Levi's Second hand).

**Four circular textiles retail propositions were surveyed:**

- Take-back schemes for clothes
- Clothing rental services
- Clothes made from recycled fibres
- Brands selling second-hand clothing.

These are the definitions for each circular retail proposition provided in the survey.



## Part 1: Awareness and Use of Circular Retail Propositions

- Take-back schemes for clothing
- Clothing rental service
- Clothing items made from recycled fibres
- Brands selling second hand clothing



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## Awareness and Use of Circular Retail Propositions: *Infographic*

Women are more likely to be frequent purchasers of clothes



**1 in 3**

women under 50 years buy clothes often on a weekly basis in stores or online.

Just over half of people are aware of clothes made from recycled fibres



**51%**

of people are aware of clothing items made from recycled fibres and **22%** have bought them..

Positive awareness of clothing rental services



**43%**

of people are aware of clothing rental services and only 5% have used it.

Awareness of brands selling second hand clothes is low



**24%**

of people are aware of brands selling second hand clothing items and only 4% have used it .

1 in 3 people are aware of clothing take-back schemes



**38%**

of people are aware of take-back schemes and only 5% have used it.

Young women are the most aware of circular retail services



**52 - 62%**

of women under 35 years are aware of clothing take-back schemes, rental services, and clothes made from recycled fibres.



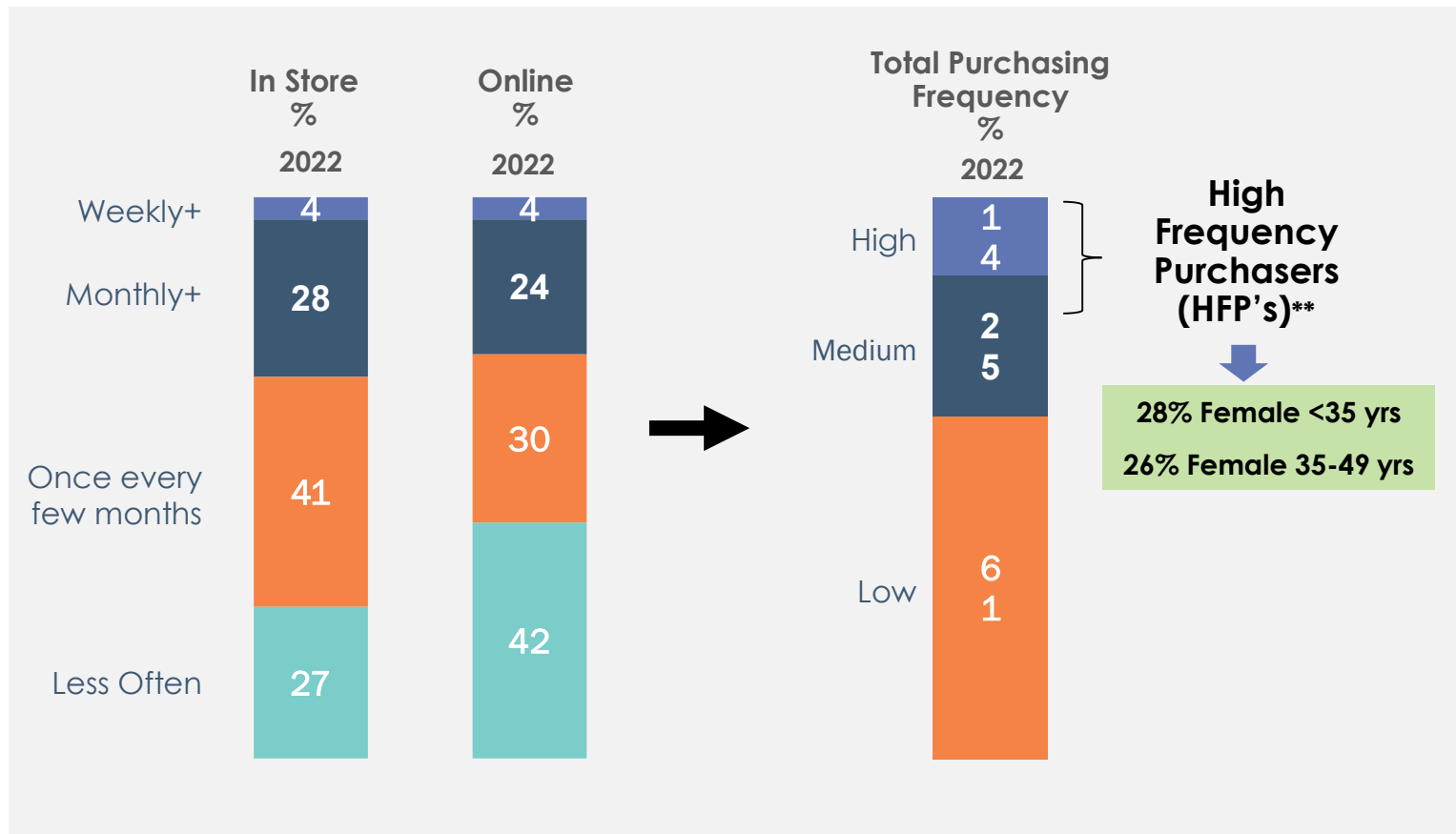
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## Frequency of Purchasing Clothes



### 39% of people are high or medium frequency purchasers of clothing

- 14% of people buy clothes often on a weekly basis, and these 'High Frequency Purchasers' buy clothes four times as frequently as the low frequency purchaser group.
- 25% of people typically buy clothes on a monthly basis, and these 'Medium Frequency Purchasers' buy clothes twice as frequently as the low frequency purchaser group.
- 61% of people are low frequency purchasers typically buying clothes once every few months or once or twice a year.
- Women under 50 years are more likely to be high frequency purchasers.
- Frequency of purchase is only marginally higher in store than online.

Q.1a Overall, how frequently do you purchase clothes for yourself in-store? Base: All adults aged 16+; N – 1,075

Q.1b Overall, how frequently do you purchase clothes for yourself online? Base: All adults aged 16+; N-1,075

\*\* Usage categories based on an aggregated and evenly weighted calculation of frequency of purchasing in store and online. Scoring as follows: Several times a week 100/ About once a week 80/ A few times a month 60 / About once a month 40/ Once every few months 20; Once or twice a year 10; Less than once a year 5; Never 0; Low <50/ Medium 50-99/ High 100+.



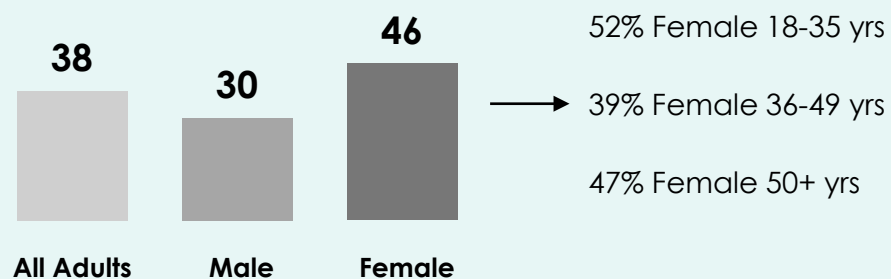
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## Awareness and Use of Clothing Take-Back Schemes

### TAKE-BACK SCHEME AWARENESS



**5%**  
Of all adults  
have used it

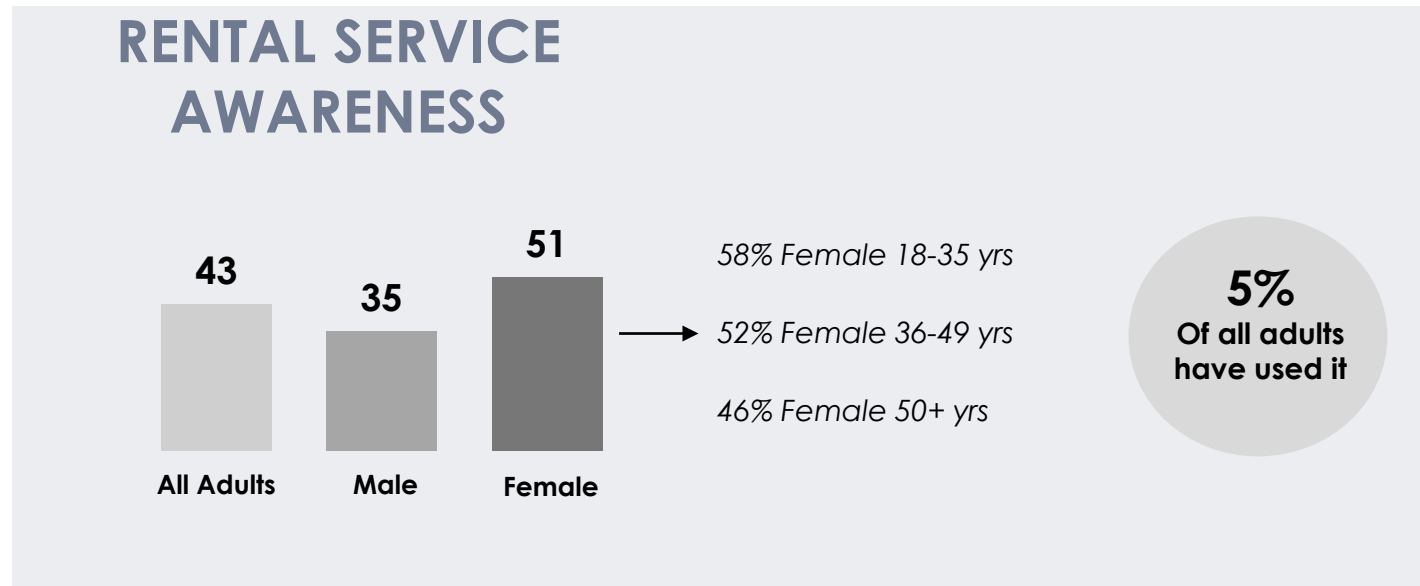
### More than 1 in 3 of people are aware of clothing take-back schemes

- **38%** of people are aware of clothing take-back schemes and awareness is higher among women (**46%**).
- Awareness of take-back schemes for clothes peaks among young women under 35 years (**52%**).
- The use of clothing take back scheme is low with only **5%** of people having already used a scheme.

Q.2 A number of clothing retailers have a take-back scheme for unwanted clothing and textiles in place in their stores. Select one of the following statements that applies to you. Base: Adults who ever purchased clothes- 1069



## Awareness and Use of Clothing Rental Service



**More than 2 in 5 people are aware of clothing rental services**

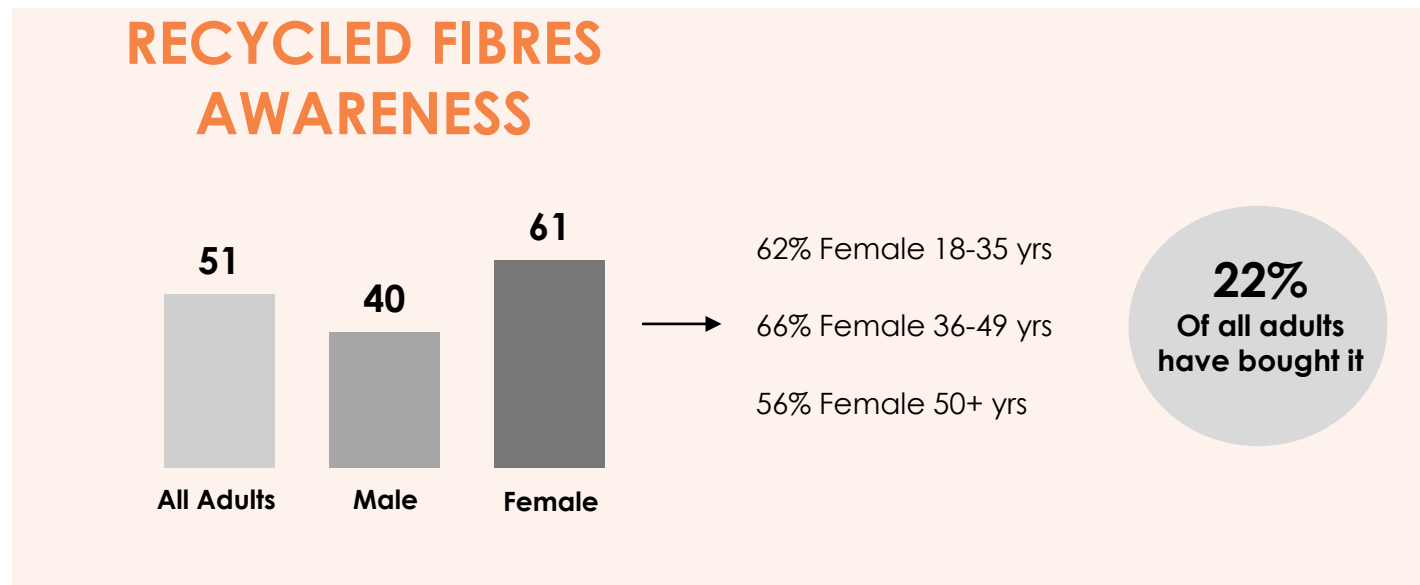
- **43%** of people are aware of clothing rental services and awareness is higher among women (**51%**).
- Awareness of clothing rental services is particularly high among women under 35 years (**58%**).
- The use of clothing rental services is low with only **5%** of people having already used this service.

Q.4 A rental service for occasion wear and designer items is offered by a number of Brands and clothing retailers online and in-store. Select one of the following statements that applies to you. Base: Adults who ever purchased clothes- 1069





## Awareness and Use of Clothing Items Made from Recycled Fibres



**Just over half of people are aware of clothing items made from recycled fibres**

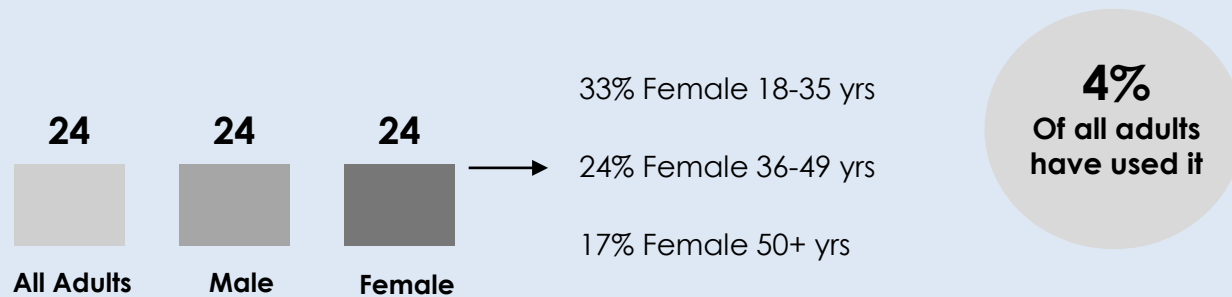
- **51%** of people are aware of clothing items made from recycled fibres and **22%** of people have bought them.
- The gender difference in awareness of clothing items made from recycled fibres is pronounced, peaking among women at **61%**.
- Awareness of clothing items made from recycled fibres is especially high among women aged 36 to 49 years (**66%**).

Q.6 A number of Brands are selling a range of clothing and textile items made from recycled fibres. Select one of the following statements that applies to you. Base: Adults who ever purchased clothes- 1069



## Awareness and Use of Brands Selling Second hand Clothing

### BRANDS SELLING SECOND HAND AWARENESS



#### Awareness of brands selling second hand clothing is low

- **24%** of people are aware of brands selling second-hand clothing items.
- Awareness of brands selling second-hand clothing items is slightly higher among women under 35 years (**33%**).
- Current use of brands selling second hand clothing is low with only **4%** of people having already used this service.

Q.8 Some Brands have an online shop to sell good condition second hand clothing items from their brand range e.g. LEVIS SECONDHAND. Select one of the following statements that applies to you. Base: Adults who ever purchased clothes- 1069



## Part 2: Influencing Trial of Circular Retail Propositions

- Take-back schemes for clothing
- Clothing rental service
- Clothing items made from recycled fibres
- Brands selling second hand clothing



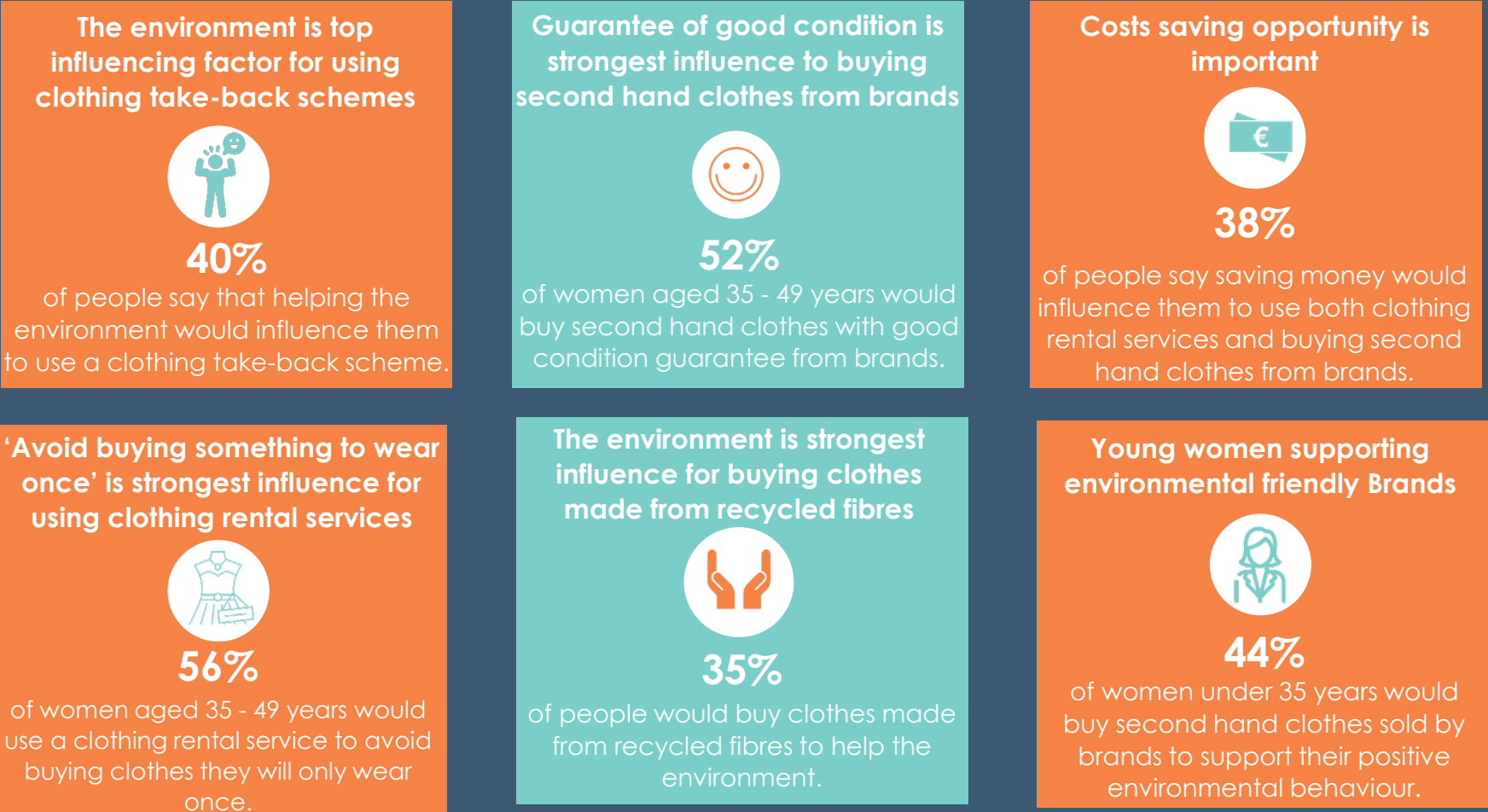
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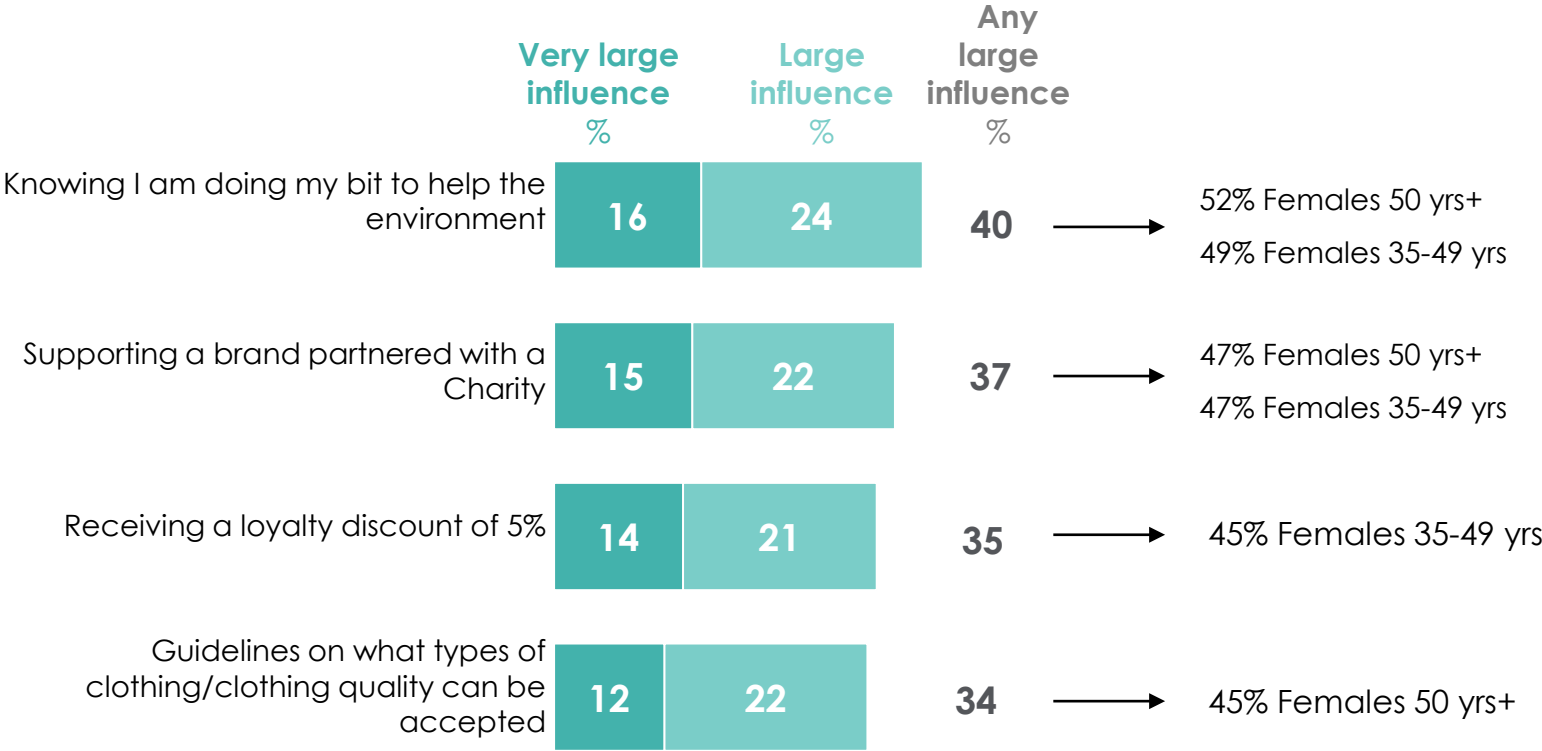


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## Influencing Trial of Circular Retail Propositions: Infographic



# Influencing Trial of Clothing Take-Back Scheme



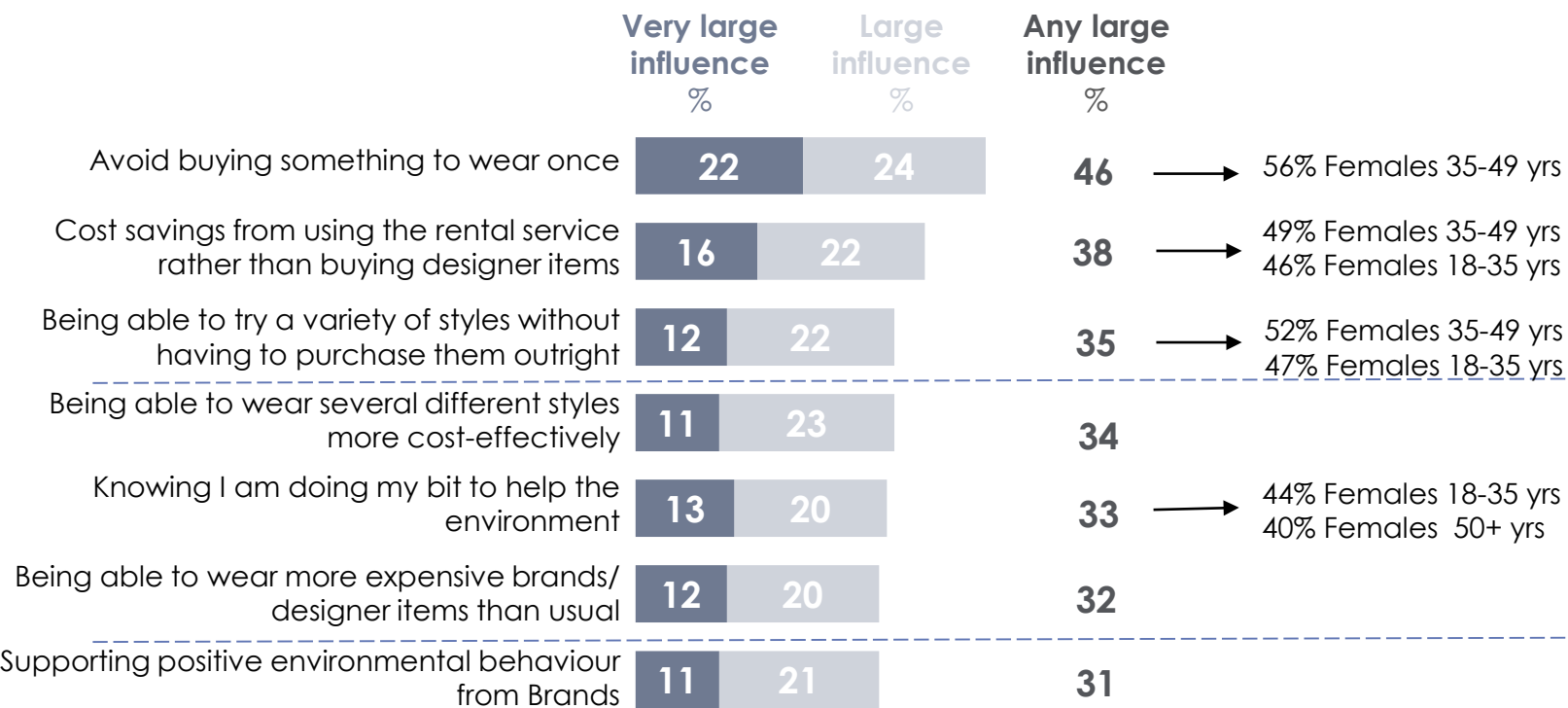
## Helping the environment is the top influencing factor to using a clothing take-back scheme

- **40%** of people say that helping the environment would influence them to use a clothing take-back scheme.
- **37%** of people would be influenced by supporting a brand partnered with a charity.
- Women aged 35+ are the most influenced by helping the environment and supporting a charity.
- More than **1 in 3** people would be influenced by a loyalty discount peaking among women aged 35- 49 (**45%**).

Q.3 Please tell us to what extent each of the following would influence you to use a take-back scheme in-store? ... Base: Adults who ever purchased clothes- 1069



# Influencing Trial of Clothing Rental Service



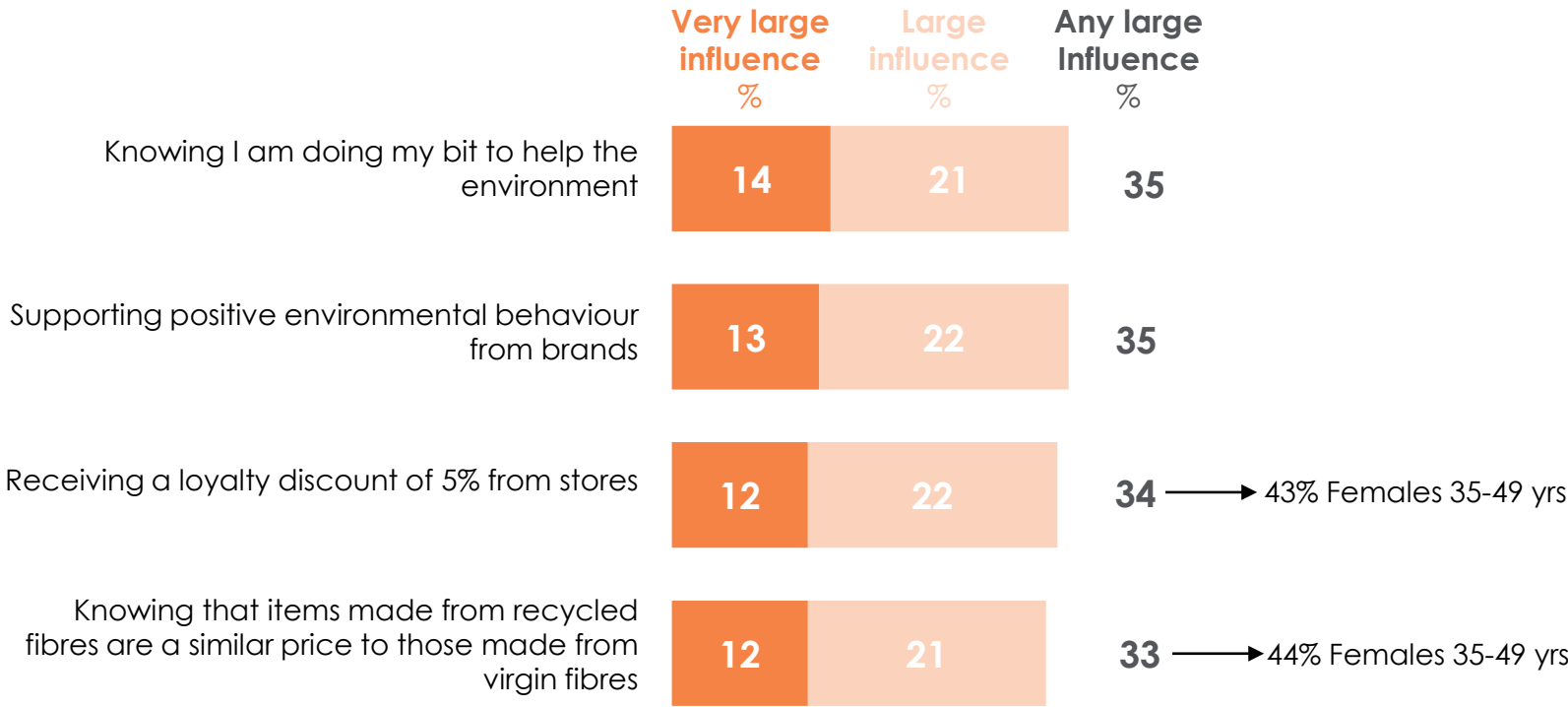
‘Avoid buying something to wear once’ is the strongest influencing factor for using a clothing rental service

- **46%** of people would use a clothing rental service to avoid buying something will wear once and this rises to **56%** for women aged 35-49 years.
- Cost-saving opportunity is the second strongest influencing factor to using a clothing rental service, especially among women under 50 years (**49%-46%**).
- **1 in 3** people would use a rental service to help the environment and this is a stronger influencing factor among women under 35 years and above 50 years.
- Women under 50 years are especially influenced by the opportunity to try more styles and more expensive brands.

Q.5 Please tell us to what extent each of the following would influence you to use a rental service for occasion wear and designer items? ... Base: Adults who ever purchased clothes- 1069



# Influencing Trial of Clothing made from Recycled Fibres

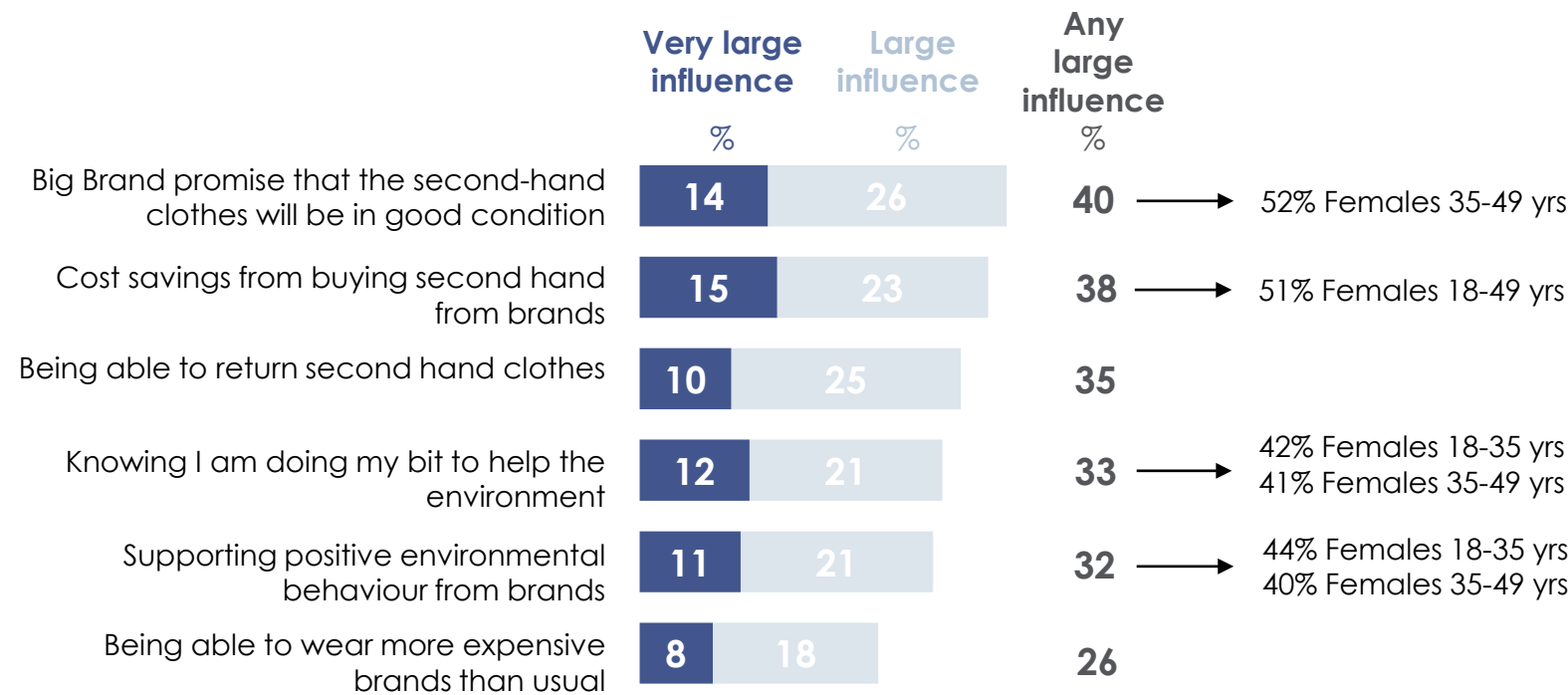


## Environmental concerns and economic aspects equally influence buying clothes made from recycled fibres

- 35% of people would buy clothes made from recycled fibres to help the environment or to support positive environmental behaviour from brands.
- About 1 in 3 of people would be influenced by receiving a loyalty discount from stores and by knowing that items made from recycled fibres are a similar price to those made from virgin fibres.
- Women aged 35 to 49 years are more strongly influenced by receiving a loyalty discount from stores (43%) and by knowing that items made from recycled fibres are similar in price to those made from virgin fibres (44%).
- .



## Influencing Trial of Brands Selling Second hand Clothing



**Guarantee of good condition is the strongest influencing factor to buying second hand clothes from brands**

- 40% of people would buy second clothes with guarantee in good condition from brands, this rises to 52% among women aged 35 to 49 years.
- The second strongest influencing factor is the cost savings from buying second hand clothes from brands (38%), especially influential among women under 50 years (51%).
- Similar to the rental service, young and middle-age women find environmental and economic aspects especially motivating to buying second hand clothes from brands.





## Part 3: Likelihood to Trial Circular Retail Propositions

- Take-back schemes for clothing
- Clothing rental service
- Clothing items made from recycled fibres
- Brands selling second hand clothing



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Likelihood to Try Circular Economy Textile Propositions: Infographic

Strong willingness to try clothing take-back schemes



58%

of people would be likely to try a take-back scheme for clothes and peaks among women 35-49 years.

Willingness to try Brands selling second hand clothes is positive



46%

of people would be likely to try buying second hand clothes sold by brands.

Younger women are more willing to try second hand clothes sold by brands



55%

of women under 35 years are willing to try buying second hand clothes from brands

Willingness to try clothing rental service is positive



40%

of people would be likely to try clothing rental services, likelihood to try is higher among women under 50 years.

Middle aged women are more willing to try circular propositions



71%

of women aged 35-49 years would be likely to try clothing take-back scheme and clothes made from recycled fibres.

Strong willingness to try clothes made from recycled fibres



56%

of people would be likely to try clothes made from recycled fibres, likelihood to try is higher among women 35-49 years.



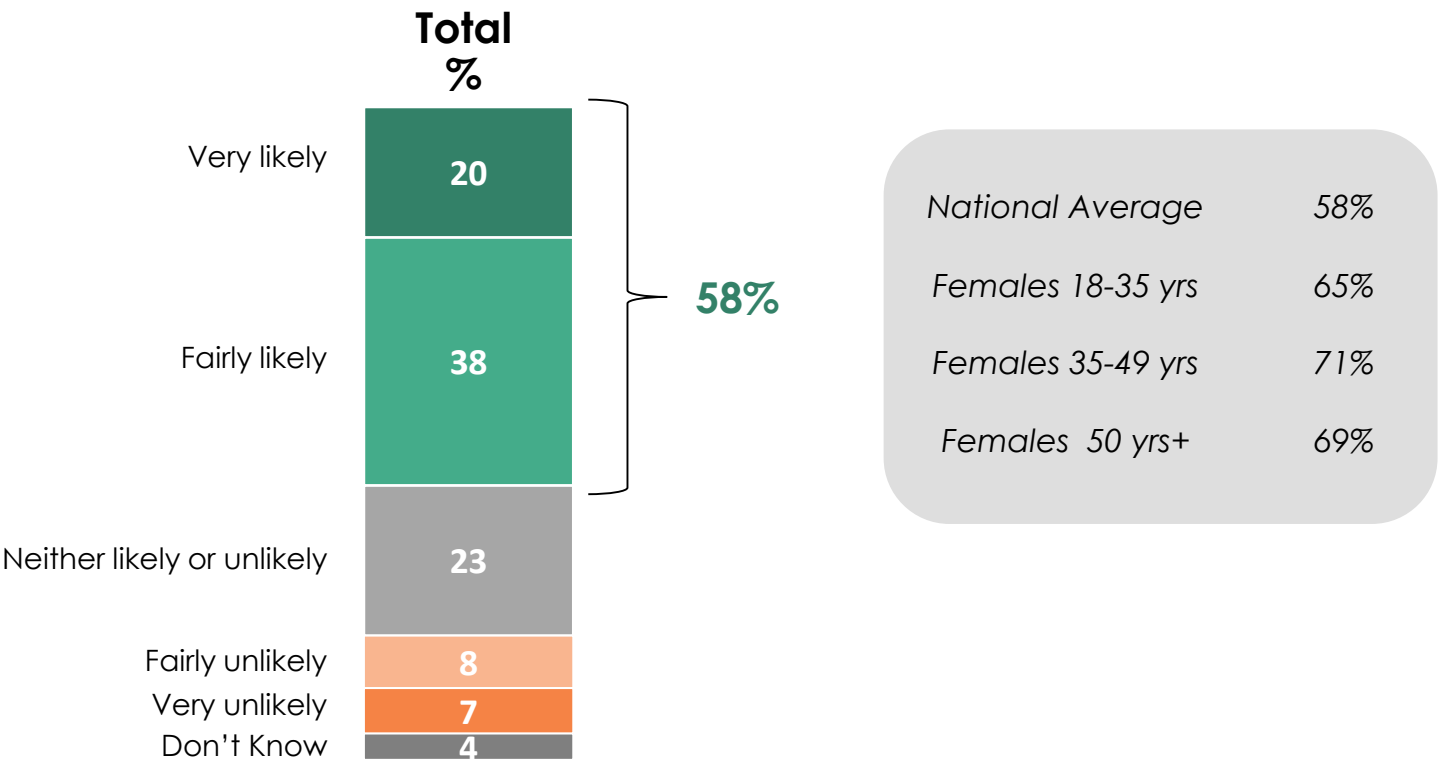
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## Likelihood to Try Clothing Take-Back Scheme

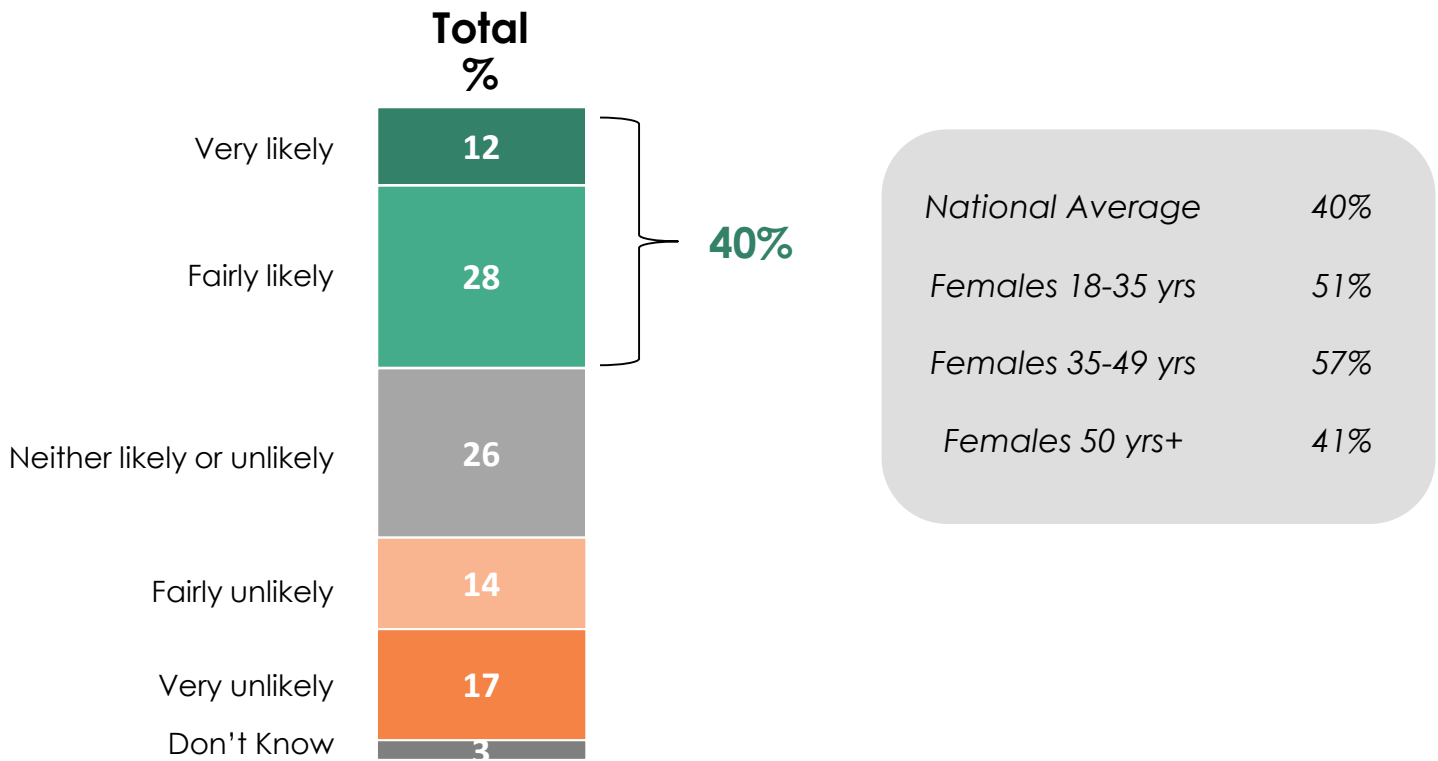


Nearly 3 in 5 people would be willing to try a take-back scheme for clothes

- **58%** of people would be likely to try a take-back scheme for clothes
- **20%** of people would be 'very likely' to try a take-back scheme.
- Willingness to try a clothing take-back scheme is higher among women and peaks among women aged 35-49 years (**71%**).



## Likelihood to Try a Clothing Rental Service

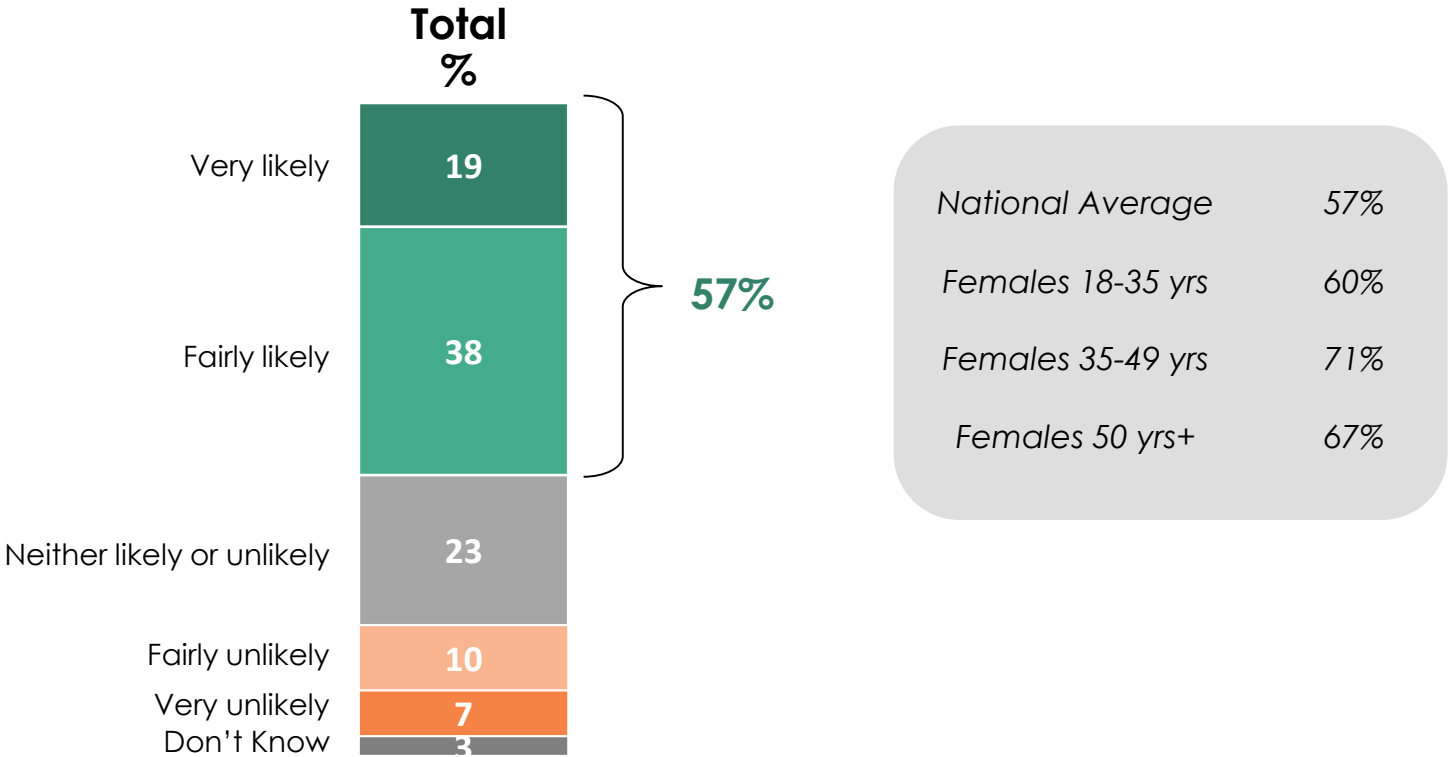


2 in 5 people would be willing to try a clothing rental service

- **40%** of people would be likely to try a rental service for clothes with **12%** of them 'very likely' to try this service.
- Likelihood to try a clothing rental service is higher among women aged 35-49, with **57%** in this group willing to trial.
- Likelihood to try the clothing rental scheme is above national average among women under 50 years (from **51% to 57%**)..



# Likelihood to try Clothes Made from Recycled Fibres



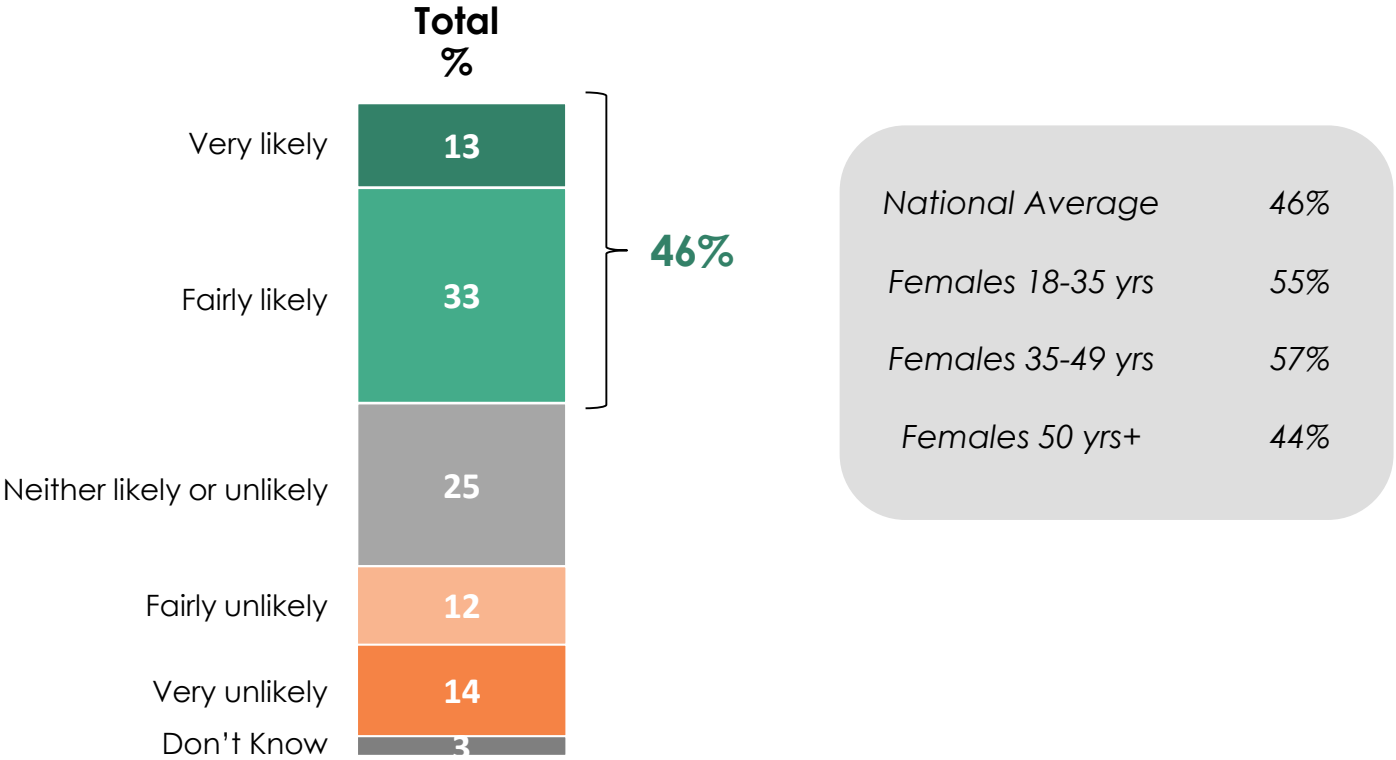
Just over half of people are willing to try clothes made from recycled fibres

- **57%** of people are likely to try clothes made from recycled fibres.
- **19%** of people would be 'very likely' to try clothes made from recycled fibres.
- Likelihood to try clothes made from recycled fibres is higher among women and peaks among women aged 35-49 years (**71%**).

Q.10 And overall, how likely would you be to try each of the initiatives we have discussed? ... (Base: Adults who ever purchased clothes- 1,069)



## Likelihood to try buying Second hand Clothing from Brands



**Almost half of people are willing try second hand clothes sold by Brands**

- **46%** of people are willing to try buying second hand clothes from brands, whit **13%** of them 'very likely' to try.
- Likelihood to try second hand clothes sold by brands is higher among women aged 35-49 years (**57%**) and those under 35 years (**55%**).

► Q.10 And overall, how likely would you be to try each of the initiatives we have discussed? ...(Base: Adults who ever purchased clothes– 1,069)



# Likelihood to Try Circular Textiles Retail Propositions: Summary

## LIKELY TO TRY...

TAKE-BACK SCHEME  
58%

RENTAL SERVICE  
40%

CLOTHES MADE FROM  
RECYCLED FIBRES  
57%

BRANDS SELLING  
SECOND HAND  
46%

People show a positive willingness to try the circular textiles retail propositions

- The strongest interest is in clothing take-back schemes (58%) and clothes made from recycled fibres (57%).
- While lower, likelihood of trying second hand clothes sold by brands, and clothing rental services remains positive at 46% and 40% respectively.

Q.10 And overall, how likely would you be to try each of the initiatives we have discussed? ... Base: Adults who ever purchased clothes- 1069



## Circular Textiles Retail Propositions: Summary Review

### TAKE-BACK SCHEME

#### Most likely to try

Almost 3 in 5 people would be willing to try a take-back scheme for clothes; willingness is higher among women and peaks among women aged 35-49 years (71%).

#### Influencing factors

Social and environmental are the top factors to motivate people to use take-back schemes, especially for women 35 years+. More than 1 in 3 people would be influenced by a loyalty discount, peaking among women aged 35- 49 years (45%).

#### Awareness & Use

Around 1 in 3 people are aware of clothing take-back schemes; their current use is low at 5%.

### RENTAL SERVICE

#### Most likely to try

2 in 5 people would be willing to try a clothing rental service; willingness is higher among women and peaks among women 35-49 years (57%).

#### Influencing factors

'Avoid buying something to wear once' is the strongest influencing factor for using a rental service. Young women strongly consider both environmental implications and cost-saving opportunities. Women under 50 years are especially influenced by opportunities to try more styles and brands.

#### Awareness & Use

Around 2 in 5 people are aware of clothing rental services; their current use is low at 5%.

### CLOTHES MADE FROM RECYCLED FIBRES

#### Most likely to try

Just over half of people are willing to try clothes made from recycled fibres; willingness is higher among women and peaks among women aged 35-49 years (71%).

#### Influencing factors

Environmental concerns and economic factors are equally influential. Women aged 35 to 49 years are particularly influenced by a loyalty discount from stores.

#### Awareness & Use

The best-known and currently most used circular retail proposition. 51% of people are aware and 22% have bought clothes made from recycled fibres. Awareness is higher among women, especially those aged 35-49 years (66%).

### BRANDS SELLING SECOND HAND

#### Most likely to try

Almost half of people are willing to try second hand clothes sold by Brands, being highest among women aged 35-49 years (57%).

#### Influencing factors

Brand guarantees of clothing condition is the strongest influence for people (40%) and is higher among women aged 35 to 49 years (52%). Cost savings is the second strongest influence, especially among women under 50 years.

#### Awareness & Use

This is the least known circular retail proposition. 24% of people are aware and 4% have tried it.



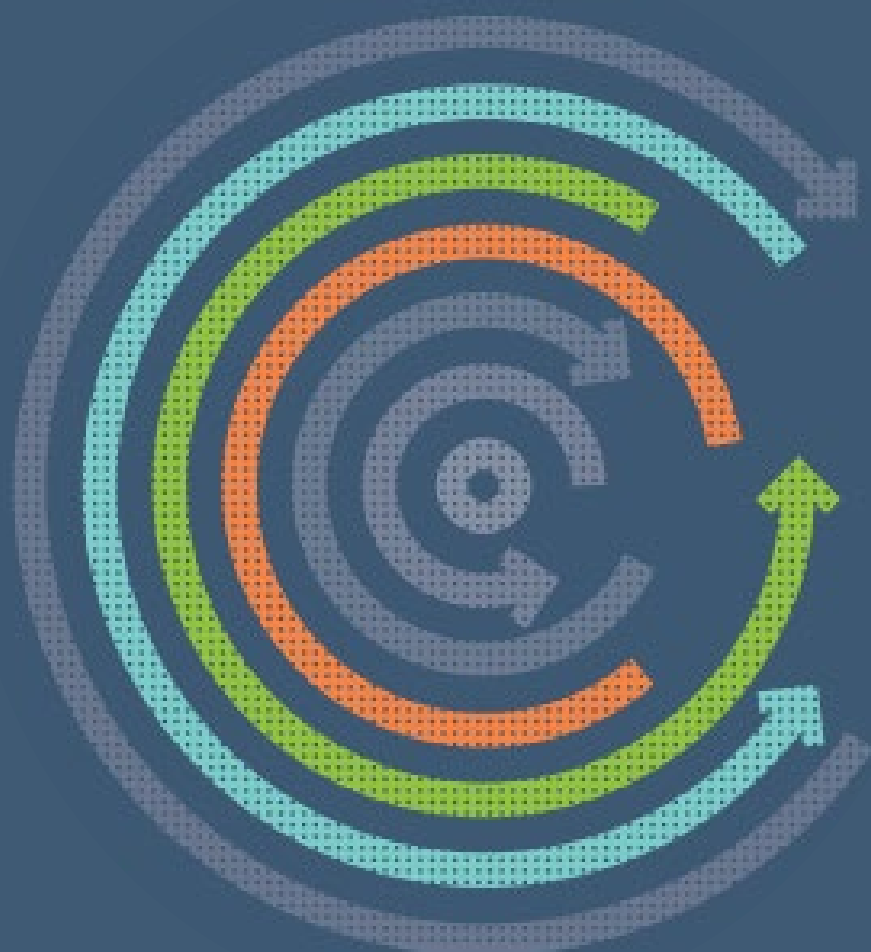
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