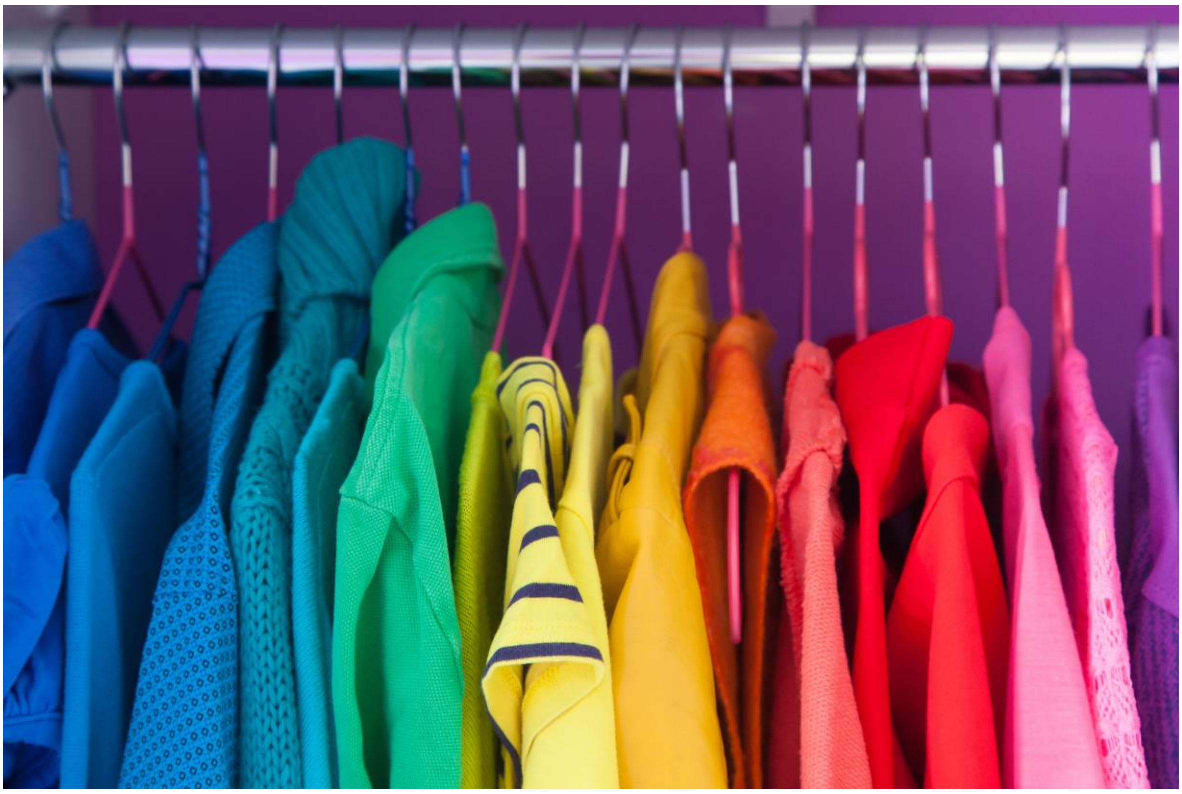
Key Findings Report

Consumer Research for ECAP 2016-2019



Evaluation and Insights Report, 2019

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Our mission is to accelerate the move to a sustainable resource-efficient economy through re-inventing how we design, produce and sell products; re-thinking how we use and consume products; and re-defining what is possible through re-use and recycling.

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Executive Summary

WRAP was awarded EU LIFE funding to lead the development of a European Clothing Action Plan (ECAP), following on from the success of the UK Sustainable Clothing Action Plan which launched in 2012. The project was joint-funded by Defra, launching in 2016 and completing in 2019.

ECAP has been supported by two waves of online surveys undertaken in four countries: Denmark, Germany, The Netherlands and Italy. Wave 1 was conducted in November 2016 and Wave 2 in June 2019. Data for the UK, gathered via separate surveys, is included where appropriate.

Key findings

Clothing acquisition

- Purchase frequency: around one in five consumers in each country are 'high frequency purchasers' (i.e. at least once a fortnight, whether in-store or online). One in three are 'low frequency purchasers' (i.e. a few times a year or less), while around half are medium frequency purchasers (i.e. monthly or every few months). There is a strong association between purchase frequency and age, with 18-34s more likely to classify as high frequency purchasers.
- Second-hand acquisition: this represents a minority of clothing acquisition overall – from 5% of the most recent purchases in Italy to 13% in Denmark. Nonetheless, compared to 2016 there has been a significant increase in both Denmark (from 9% to 13%) and Germany (from 5% to 8%). While this is not observed in either The Netherlands or Italy, here there has been a significant increase in consideration of second-hand options (even though the eventual purchase was new). Second-hand purchase is notably highest among younger consumers aged 18-34, those with children aged 0-12 at home, consumers with a lower household income and those who say they have seen the Love Your Clothes (LYC) campaign in the past year.
- Estimated clothing longevity: consumers in Denmark have the longest expected longevity (an average of 5.2 years across nine clothing categories) and those in Italy the lowest (3.5 years). There are few differences compared to 2016 - the exception being Germany where there has been a significant increase (from 3.8 to 4.4 years). Estimated longevity is lowest among 'high frequency purchasers'.
- New clothing acquisition models: a significant group of consumers across each country are receptive to new acquisition models. For example, between 37% (The Netherlands) and 68% (Italy) for exchanging clothing for vouchers; between 28% (The Netherlands) and 41% (Demark) for Pre-Loved clothing; and between 13% (UK) and 39% (Italy) for a clothing subscription service. Receptivity is highest among 18-34s, those with children living at home, high frequency purchasers and those who say they have seen the LYC campaign in the past year.

Clothing care behaviours

- Laundry wash temperatures: 40 and 30 degrees are the most frequently used wash temperatures in all countries. In Italy a higher proportion say that a cold or 20 degree wash is their main setting (10% vs. 1% in Germany); 30 degrees is most common in the UK (39% vs. 20% in Denmark); and 60 degrees is most common in Germany (15% vs. 4% in the UK). Comparisons with 2016 show a significant increase in the UK for 30 degree main washes (from 36% to 39%) and a significant fall in Italy for 60 degrees main washes (17% to 13%).

- Laundry loads: the average number of wash loads per week is highest in Italy (5.9) and lowest in Germany (4.0). This is in part reflects consumers in Italy undertaking smaller wash loads (e.g. half washes). There has been a significant decrease since 2016 in three countries – Denmark (from 5.5 to 4.5 per week), Germany (4.4 to 4.0) and The Netherlands (6.0 to 4.8).
- Tumble drying: consumers in Denmark and The Netherlands are most likely to tumble dry, with those in Italy least likely. Taking an average across nine clothing categories, 28% and 27% of all items are tumble dried in Denmark and The Netherlands, respectively, compared to 20% of items in Germany and 16% in Italy. Comparisons with 2016 show a stable pattern in Denmark and The Netherlands; whereas there has been a significant decrease in Germany (from 23% in 2016 to 20% now) and a significant increase in Italy (13% to 16%). There are two consistent sub-group trends: men are more likely to tumble dry than women and there is a higher probability of tumble drying among those who wash at a higher temperature (i.e. 60 degrees or higher).
- Repair confidence: the majority of consumers in all four countries say they would be confident sewing on a button and removing common stains. By contrast, only a minority would be confident replacing a zip, taking an item in or out, and replacing a pocket. The only significant change over time is in Germany where fewer consumers say they would be confident doing several of the repairs. Across every skill, women are significantly more confident than men.
- Repair interest: between one in ten and one in four consumers in each country say that, while they would not currently be confident undertaking the repairs, they would like to learn. The skills where interest is highest are replacing a zip, followed by taking an item in or out. Consumers in Italy report significantly higher levels of interest. Furthermore, 18-34s are significantly more likely to say they would like to learn.

Disposal

- Levels of disposal: a wide range of clothing items have been disposed of in the past year across the four countries – with T-shirts/short-sleeved tops most commonly cited (by around half of consumers). Women are more likely than men to dispose of more clothing item categories, as are high frequency purchasers.
- Disposal routes: disposal routes vary across the countries. For example, consumers in Denmark and Italy are more likely to use charity shops (used to dispose of 42% and 34% of items respectively, vs. 20% in both Germany and The Netherlands). Consumers in Germany are more likely to use a clothes-bank (32% of items vs. 16% in Denmark). Consumers in Germany and The Netherlands are more likely to use a charity bag collection (17% and 16% of items, respectively), while consumers in Italy are more likely to pass items on to family/friends (20% of items).

- Compared to 2016, there has been an increase in Denmark in items disposed of in a charity/community shop and a decrease in the number disposed of in the general rubbish and at clothing collection points (‘bring banks’). In The Netherlands there has been a decrease in disposal via charity/community shops and passing on to family/friends (13% to 10%). In Italy there has been an increase in disposal via a charity/community shop (31% to 34%) and passing on to family/friends (17% to 20%).
- Men are consistently more likely than women to dispose of clothing items in the general rubbish, whereas women are more likely to pass clothing on to others. Low income households (less than €15,000/year) are also more likely to pass on items to others.

LoveNotLandfill campaign

A separate but related piece of consumer work was done to give insight into the consumer behaviours of 18-24 year olds living in London. Two online surveys were undertaken in London with Wave 1 conducted over the period 10-18 October 2017 and Wave 2 between 12-22 July 2019 to understand the behaviours of clothing purchase, care, maintenance and disposal. Details of the methodology and results have been added at the end of this report as it was a separate piece of work.

Introduction

In 2015 WRAP was successful in being awarded EU LIFE funding to lead the development of a European Clothing Action Plan (ECAP), following on from the success of the UK Sustainable Clothing Action Plan which launched in 2012. The project has been joint-funded by Defra, launching in 2016 and completing in 2019.

The purpose of ECAP is to:

- Reduce the waste, water and carbon footprints of EU clothing.
- Prevent waste in the clothing supply chain and the use of domestic clothing and workwear by business, consumers and governments.
- Ensure that less low-grade clothing and textiles go to incineration and landfill.
- Encourage innovation in resource-efficient design and service models to encourage business growth in the clothing sector and its supply chain.

This will in turn deliver against European policy directives on waste and sustainable consumption and production[1] and EU ambitions for developing low carbon and more circular approaches[2] to economic growth.

The purpose of this research element was three-fold: to first establish and then track consumer behaviour in four EU countries for clothing purchase, care, maintenance and disposal; to provide consumer insights to help develop consumer interventions; and to update use-phase assumptions in the ECAP footprint calculator that is used to calculate water, carbon and waste footprints for clothing in Europe.

Methodology

Two online surveys were undertaken in four countries: Denmark, Germany, The Netherlands and Italy. Wave 1 was conducted over the period 01-10 November 2016 and Wave 2 between 14-24 June 2019.

The overall samples were designed to be nationally representative with quotas on age interlocked with gender. These targets met almost exactly so no weighting was required. The final sample size in 2016 was 1,000 in each nation. In 2019 the samples were as follows: Denmark – 1,046; Germany – 1,113; The Netherlands – 1,117 and Italy – 1,226.

Some questions were asked in both surveys to enable comparisons across time (i.e. to observe any impact on attitudes and/or behaviours). Other questions were asked in one of the surveys only, in order to generate insights for WRAP and its partners (i.e. to support strategic targeting or the development of specific campaigns).

There are some points where comparable data for the UK is also available and in these instances it is included as a fifth country. However, while the questions were identical, the UK survey was undertaken separately by a different contractor and so there could

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[1] https://ec.europa.eu/environment/eussd/escp_en.htm
[2] https://ec.europa.eu/environment/circular-economy/index_en.htm

be some differences in the sampling methodology, survey timings and questionnaire sequencing – all of which could have subtle impacts on the results.

Statistical significance

Statistical tests have been performed to assess whether an apparent difference in the survey data (i.e. across years or between sub-groups) is statistically significant or not.

These tests have been undertaken to the 95% confidence level (i.e. 95 times out of 100 the observed difference will be real vs. 5 times out of 100 it will have happened by chance).

Because a sample of households has completed the survey (rather than a census), the results are subject to statistical margins of error. For the 2019 results as a whole, the maximum margin of error in the results per country is ±3.1% (i.e. if the survey in Germany gives a result of 50% then the real result, if all households in Germany were interviewed, would be somewhere in the range 46.9% - 53.1%). When comparing results across time, for example the results in 2019 vs. 2016, the maximum margin of error per country is ±5% (i.e. an increase in Denmark from 50% in 2016 to 55% in 2019 would be statistically significant, whereas a 2019 result of 54% would not be).

Any results that are statistically significant are clearly marked throughout the report and in charts they are denoted in bold/underline font and superscript letting to say what the result is different to (e.g. 'D' would mean the result is significantly different to the Denmark result, or 'all' would mean it is different to all of the other three countries). A colour scheme is also used at points – with a figure in purple representing a significant decrease and a figure in orange representing a significant increase.

Analysis by different audiences and groups within the population

In addition to the results for the four countries as a whole (and the comparisons between 2016 and 2019), analyses have also been undertaken according to a range of socio-demographic variables (e.g. age, gender, children in the household) and clothing shopping habits (e.g. purchase frequency).

1. Clothing acquisition

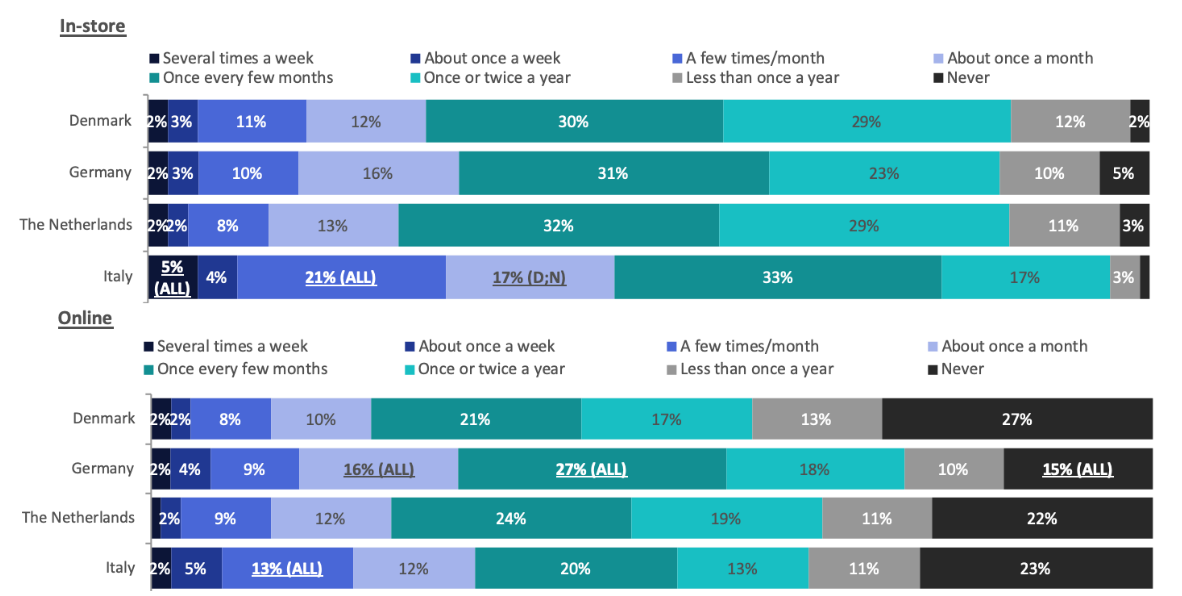
1.1 Purchase frequency

Between one in four and one in three consumers in each country reports purchasing clothing in store at least once a month (Figure 1). For example, 32% consumers in Germany purchase clothing in-store at least once a month, compared to 28% in Denmark and 25% in The Netherlands. The exception is Italy, where almost half (47%) say they purchase in-store at least once a month.

Turning to online clothing purchase, a similar pattern to in-store purchase is evident for the proportion of consumers who purchase at least once a month (30% in Germany, 22% in Denmark and 24% in the Netherlands). Here, Italy is in line with the other countries (32%). In fact, the main difference between in-store and online purchases is the proportion who say they 'never' shop for clothes this way. This is very low for in-store purchases (between 1% in Italy and 5% in Germany) and higher for online clothes purchases (between 15% in Germany and 27% in Denmark).

Figure 1 – Clothing purchase frequency

Q14a. Overall, how frequently do you purchase clothes for yourself in-store?
Q14b. Overall, how frequently do you purchase clothes for yourself online?
Base: All (Denmark: 1,046; Germany: 1,113; The Netherlands: 1,117; Italy: 1,226). June 2019



For in-store clothing purchases, there are a number of significant differences in the frequency of purchase across sub-groups within the population, as follows:

- **Age**: Purchase frequency is strongly associated with age – a trend that is consistent across all four countries. For example, in Germany 28% of those aged 18-34 purchase clothes at least fortnightly in store, compared to 6% of those aged 55+.
- **Children at home**: three of the four countries show a strong difference between those households with and without children at home. For example, in Denmark 24% of households with children at home purchase clothes in-store at least fortnightly vs.

12% with no children living at home – a trend also observed in Germany and Italy. The exception is The Netherlands where there is no significant difference between these groups.
- **Income**: Italy is the only country which shows a correlation between in-store purchase of clothing and income. For example, 52% of those with an income of €70,000+ per year purchase clothes in store at least fortnightly (vs. 23% of those who have an income of less than €15,000).

The same trends are evident for online clothing purchases as per in-store purchases.

By combining in-store and online clothing purchase frequency it is possible to derive three groups: *high frequency purchasers* (i.e. purchase clothing at least once a fortnight, whether in-store or online); *low frequency purchasers* (i.e. a few times a year or less) and *medium frequency purchasers* (i.e. monthly or every few months). This demonstrates that:

- Around one in five in each country are high frequency purchasers (18% in The Netherlands; 21% in Germany and 22% in Denmark);
- Approximately one in three are low frequency purchasers (31% in The Netherlands; 27% in Germany and 33% in Denmark);
- Close to half are medium frequency purchasers (50% in The Netherlands; 53% in Germany and 47% in Demark).

The exception is Italy where there is a higher proportion of high frequency purchasers (34%) and correspondingly fewer low frequency purchasers (16%). The proportion of medium frequency purchasers in Italy is in line with the other countries.

1.2 New vs. second-hand acquisition

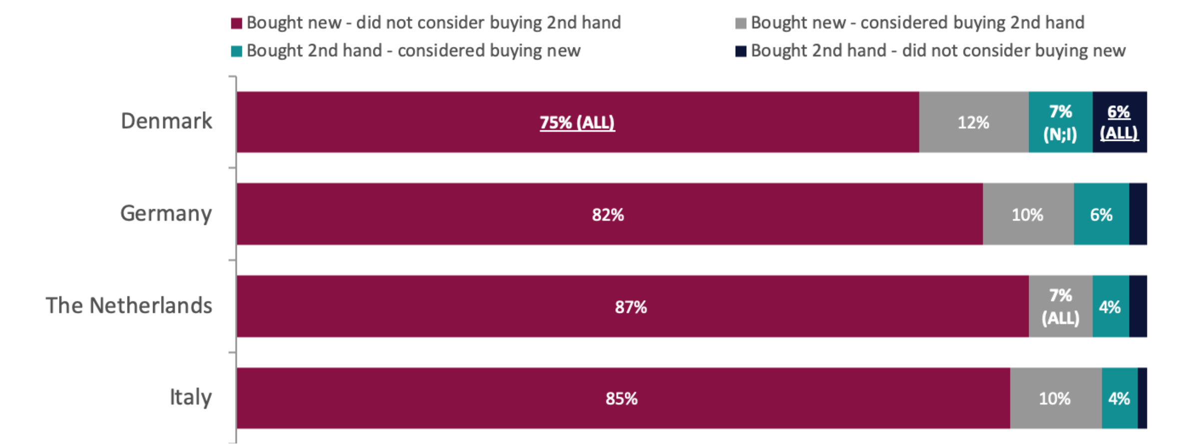
To asses new vs. second-hand acquisition, the questionnaire used a construct of asking about the last three clothing purchases and – for each of these – whether they were purchased new or second-hand (and also whether a new or second-hand option was considered as an option).

The 2019 results demonstrate limited levels of second-hand consideration and acquisition across the four countries (Figure 2). For example, consumers in Denmark are the most likely to consider and purchase second-hand (13% of the last three purchases were second-hand; 12% were new but a second-hand option was considered; while 75% were new with no consideration of second-hand). By contrast, consumers in Italy are the least likely to have actually purchased second-hand (5% of the last three purchases were second-hand), even though double that amount were new but did involve consideration of a second-hand alternative. Consumers in The Netherlands are the most likely to purchase new without considering second-hand (true of 87% of the last three purchases).

Figure 2 – New vs. second-hand purchases

Q15. Think about the last three items of clothing you bought (excluding anything that was handed down to you / you received for free). Please tell us about them…?

Base: All items bought (Denmark: 3,073; Germany: 3,274; The Netherlands: 3,308; Italy: 3,620). June 2019



There are also a number of sub-group differences that are relatively consistent across the four countries:

- **Age**: second-hand purchase is highest among younger consumers aged 18-34. For example, in Denmark 17% of the last three purchases made by this cohort were second-hand vs. 8% for those aged 55+. This is also true in Germany (16% vs. 5%) and The Netherlands (7% vs. 3%). In Italy there is no significant difference (6% vs. 4%).
- **Children at home**: those with children living at home report higher levels of second-hand purchase, particularly those with children aged 0-12. In Denmark, for example, 18% of the last three purchases made by this group were second-hand (vs. 12% made by those with no children at home). In Germany the corresponding figures are 12% vs 8%. There is no observable trend in either Italy or the Netherlands.
- **Income**: second-hand purchases are higher among lower income groups. For example, among those in Germany with an income of less than €15,000, 19% of the last three purchases were made second-hand (vs. 5% among those with an income of €70,001+). This trend is observed in all four countries.
- **'Love Your Clothes' recognition**: second-hand purchase is higher among those who say they have seen the LYC logo in the past year. For example, in Germany 29% of the last three purchases made by those who have seen the logo were second-hand vs. 12% among those who haven't seen it. The same is true of Denmark (32% vs. 12%); The Netherlands (13% vs 4%); and Italy (9% vs. 4%).

While the 2019 results point to second-hand purchase remaining a relatively niche activity, when compared with the results from 2016 there have been a number of significant shifts (Figure 3). For example:

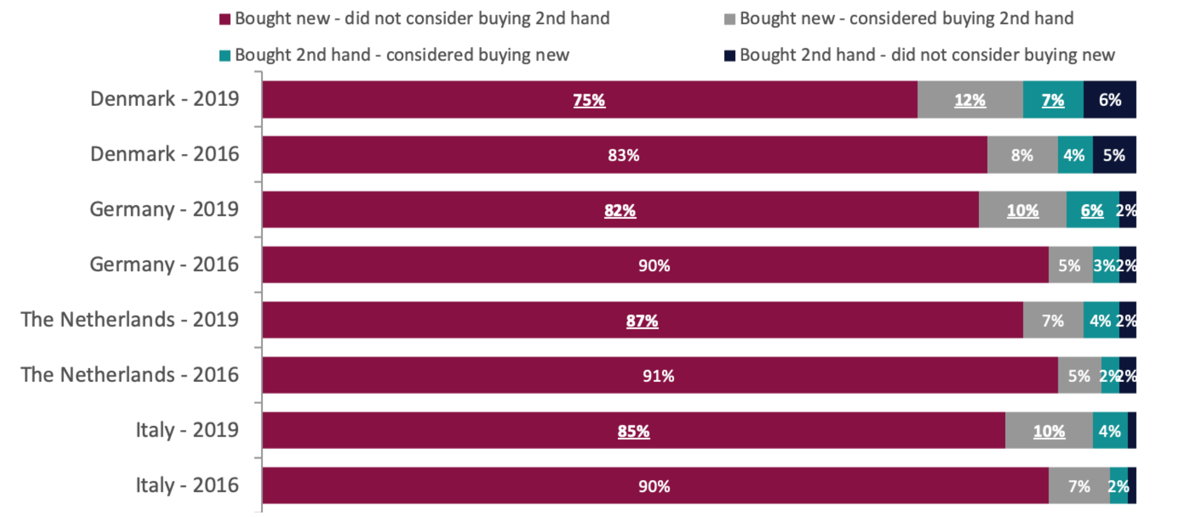
- The proportion of the last three purchases that are new with no consideration of a second-hand alternative has decreased in all four countries (for example, from 83% to 75% in Denmark).

- In Denmark and Germany there has been an increase in the proportion of second-hand purchases. In Demark, 13% of the last three purchases were second-hand (vs. 9% in 2016); whereas in Germany 8% were second-hand (vs. 5% in 2016).
- In The Netherlands and Italy there has not been a significant increase in actual second-hand purchases – rather, it is consideration of second-hand options that has increased (even though the eventual purchase was new).

Figure 3 – New and second-hand purchases – over time

Q15. Think about the last three items of clothing you bought (excluding anything that was handed down to you / you received for free). Please tell us about them…?

Base: All items bought (2019 = Denmark: 3,073; Germany: 3,274; The Netherlands: 3,308; Italy: 3,620). June 2019



1.3 Clothing longevity

To assess clothing longevity, the survey asked respondents – for a range of items they own – two things: (a) how long ago they acquired it; and (b) how much longer they expect to continue wearing it. The combination of these two answers gives an estimated longevity across a range of items.

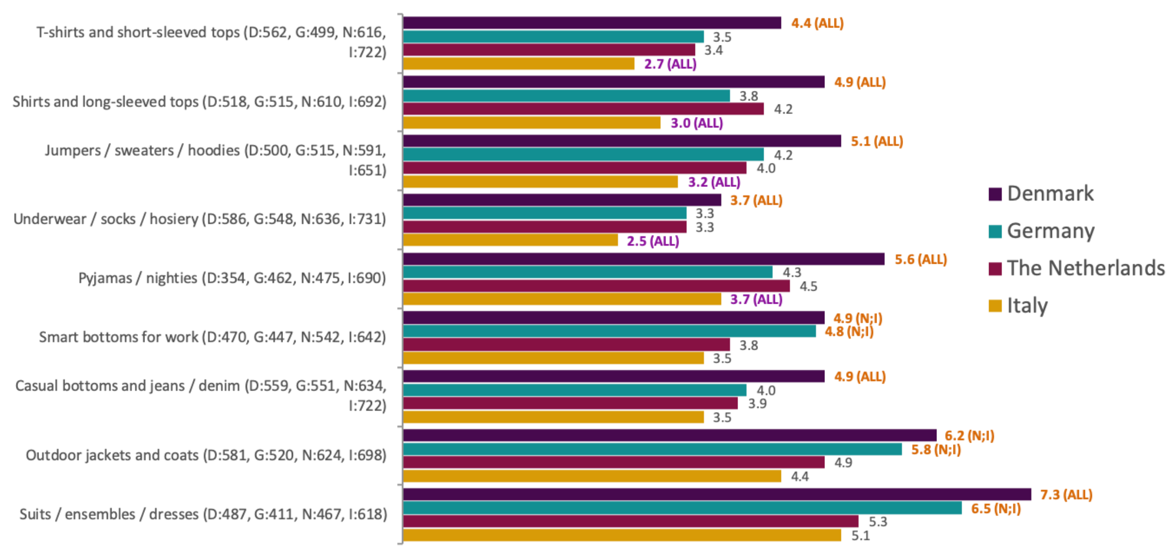
The results demonstrate that consumers in Denmark have the longest expected longevity for their items of clothing; whereas those in Italy have the lowest (Figure 4). For example, consumers in Denmark report an estimated longevity of 4.4 years for t-shirts/short sleeved tops compared to 2.7 years in Italy (with Germany and The Netherlands at 3.5 and 3.4 years, respectively). Consumers in Germany have higher anticipated longevity for some items (including smart bottoms for work, outdoor jackets/coats and suits / dresses) but this does not extend to others.

The overall average across the nine items shows an estimated longevity of 5.2 years in Denmark, compared to 4.4 years in Germany, 4.1 years in The Netherlands and 3.5 years in Italy.

Figure 4 – Estimated longevity

Q14a+b. Thinking of the last item you wore a) how long ago did you acquire it, and b) how much longer do you think you will continue to wear it?

Base: Those who own each item; 6 items randomly assigned to each household (bases in brackets). June 2019



Comparisons with the 2016 baseline show no significant change in three of the four countries – in Denmark (5.0 years in 2016 vs. 5.2 years in 2019), The Netherlands (4.1 vs. 4.1) and Italy (3.8 vs. 3.5). The exception is Germany where there has been a significant increase in estimated longevity – from 3.8 years in 2016 to 4.4 in 2019. This change in the overall composite longevity reflects significant increases in longevity in seven of the nine clothing categories.

Turning to sub-group differences within the population, longevity is most strongly associated with frequency of purchase – with anticipated longevity lowest among 'high frequency purchasers' (i.e. purchasing at least every fortnight). For example, in Denmark they have an overall longevity average of 4.0 years (vs. 7.2 years among low frequency purchasers). The same is true in Germany (3.4 years vs. 6.8); The Netherlands (3.0 vs. 6.1) and Italy (2.9 vs. 5.0)

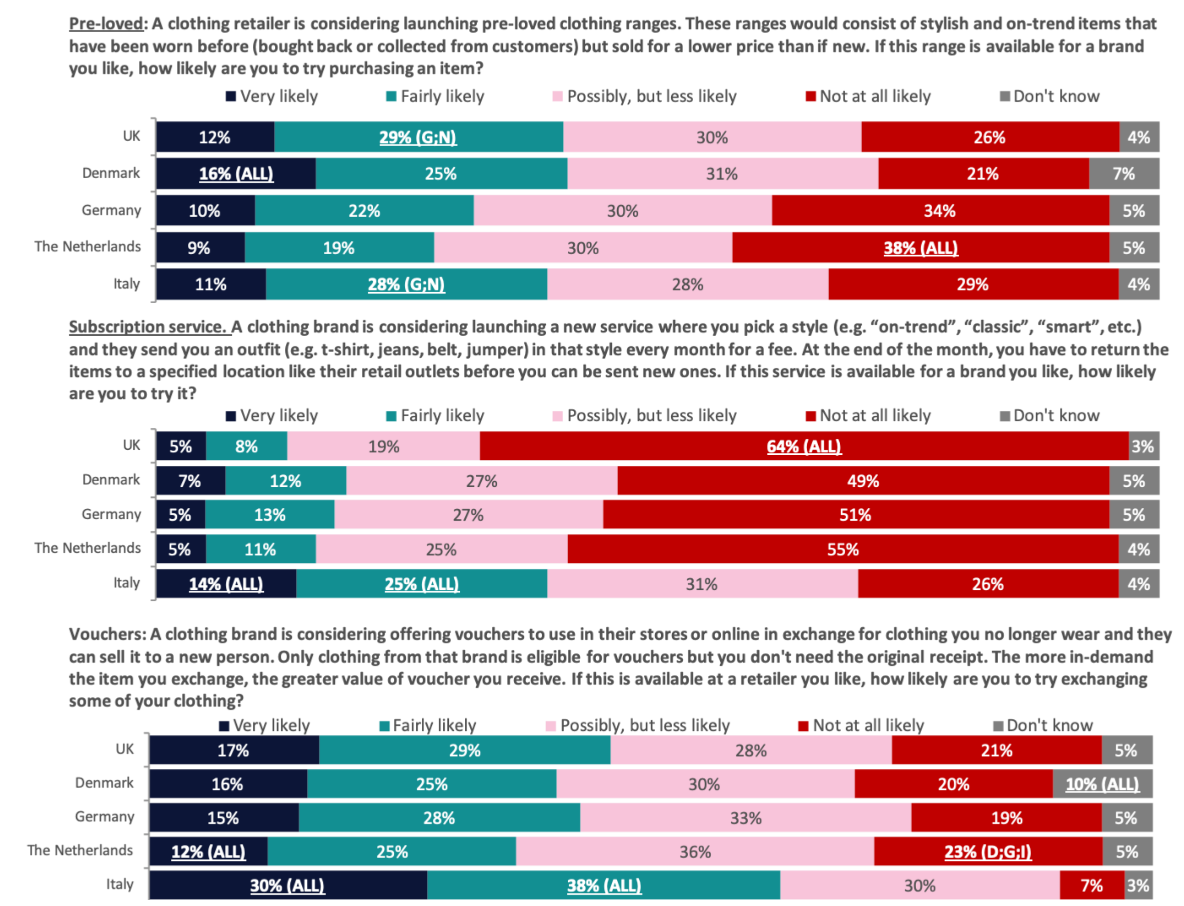
1.4 Receptivity to new clothing models

The survey asked consumers about their receptivity to three new clothing models – Pre-Loved clothing, vouchers for exchanging clothes in store, and a clothing subscription service. The precise wording of each proposition is shown below in Figure 5.

The results demonstrate that a significant group of consumers across each country are receptive to the propositions. For example, between one in three and two in five consumers say they are very or fairly likely to consider purchasing a Pre-Loved item (41% in both Denmark and the UK, 39% in Italy, 32% in Germany and 28% in The Netherlands). Similar proportions say they are likely to exchange clothing items in store for vouchers – with consumers in Italy notably more receptive (68%) and those in The Netherlands least receptive (37%). The subscription service appeals to fewer consumers, although again consumers in Italy are more receptive (39%).

Figure 5 – Receptivity to new clothing business models

The question wording for each proposition is shown below in the graph
Base: All (Denmark: 1,046; Germany: 1,113; The Netherlands: 1,117; Italy: 1,226). June 2019



Receptivity to these clothing models varies across several sub-groups within the populations. For example for Pre-Loved clothing, five variables are highly associated with stated receptivity:

- **Gender**: women are more likely to try purchasing a Pre-Loved item than men. For example, in The Netherlands 33% of women are likely to try purchasing an item (vs. 22% of men). The same is true in Denmark (51% vs. 31%) and Germany (37% vs. 26%), but not in Italy.
- **Age**: purchase propensity is highest among 18-34s (followed by 35-54s) and lowest among those aged 55+. For example, in The Netherlands 40% of 18-34s would likely purchase an item vs. 28% of 35-54s and 19% of those aged 55+. The same is true in all four countries.
- **Children at home**: Those with a child aged 0-17 at home are more likely to purchase an item. For example, in Denmark 53% of those with a child aged 0-17 would likely purchase an item vs. 37% of those with no children at home. The same is true in all four countries.
- **Clothing purchase frequency**: purchase propensity is highest among high frequency purchasers. For example, in The Netherlands 37% of high frequency purchasers would likely purchase an item vs. 20% of low frequency purchasers. The same is true in Germany (46% vs. 22%); Denmark (59% vs. 28%) and Italy (56% vs. 27%).

- **LYC recognition**: purchase propensity is higher among those who have seen LYC. For example, in The Netherlands 56% who have seen LYC would likely purchase an item vs. 26% who have not. This is also true in Germany (74% vs. 29%), Denmark (70% vs 39%) and Italy (64% vs. 35%).

The same sub-group trends are broadly apparent for both the subscription and vouchers clothing models - with the exception of gender for the subscription service, where there is no significant difference in receptivity between men and women.

2. Clothing care behaviours

2.1 Laundry wash temperatures

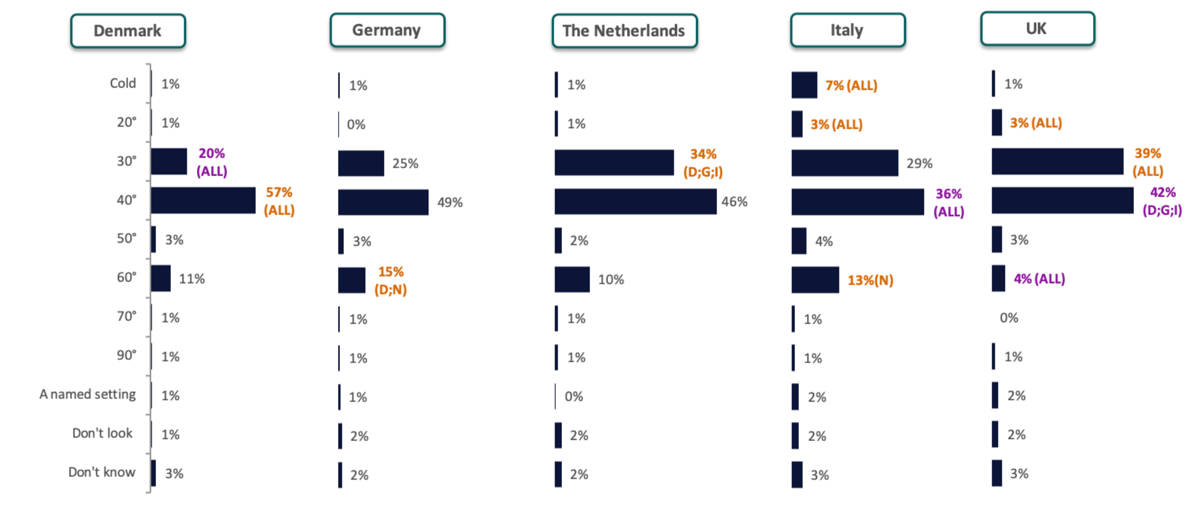
The research highlights that 40 degrees is the most frequently used laundry wash temperature in all five countries (Figure 6), followed by 30 degrees. In every country, with the exception of Italy, either 30 or 40 degree washes are the main settings for around three quarters of all households (whereas in Italy they account for 65%).

In Italy a higher proportion say that a cold or 20 degree wash is their main setting (10% vs. 4% in the UK and 1% in Germany). A main setting of 30 degrees is most common in the UK (39%) and least common in Denmark (20%). A main setting of 60 degrees is most common in Germany (15%) and least common in the UK (4%).

Figure 6 – Wash temperature most commonly used

Q11a. Which temperature do you most frequently use when washing clothes?

Base: Those with at least some laundry responsibility and a washing machine / washer drier at home (Denmark: 840; Germany: 1,037; The Netherlands: 987; Italy: 1,120; UK: 1,486). June 2019



Comparisons with 2016 demonstrate some significant changes – notably an increase in the UK in the proportion who cite 30 degrees as their main temperature (from 36% to 39%) and a corresponding decrease in the proportion who cite 40 degrees (48% to 42%). Italy shows a significant fall in the proportion who say 60 degrees is their main temperature (17% to 13%).

Sub-group differences are evident but not always consistent across the countries. For example:

- **Denmark** - younger households are more likely than average to say their main wash temperature is 30 degrees (27%), as are those with children aged 0-5 (26%) and women (23%). 40 degrees is more likely than average to be the main setting among 35-54s and those aged 55+ (61% and 61%, respectively).
- **Germany** – women are more likely than average to say that their main wash temperature is 30 degrees (29%), as are those with children (27%). Men are more likely than average to say that their main wash setting is 60 degrees (18%).
- **The Netherlands** - 40 degrees is more likely than average to be the main setting among 35-54s and those aged 55+ (50% and 49%, respectively). Men are more likely than average to say their main wash setting is 60 degrees (13%).
- **Italy** - Men are more likely than average to say their main wash setting is 60 degrees (16%).

The survey also asked about other wash temperatures that consumers use on a regular basis. The findings mirror the trends noted above – for example, 30 degree washes are more common in the UK; cold or 20 degree washes are more common in Italy; 60 degree washes are more common in Germany (as well as Denmark); and 90 degree washes are also more common in both Denmark and Germany (17% in both countries say this is a setting they regularly use vs. 3% in the UK).

2.2 Number of laundry loads

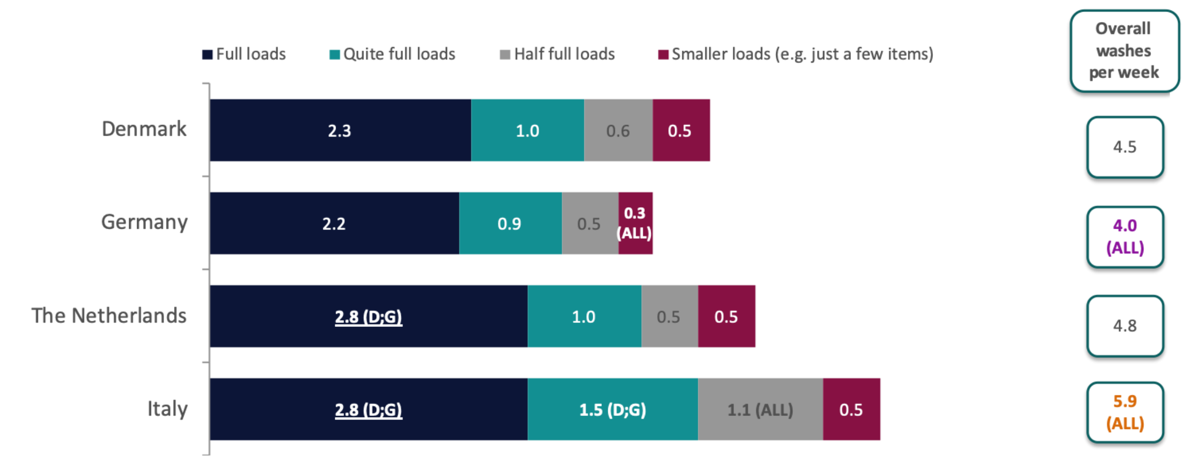
The survey demonstrates some significant differences in the average number of laundry washes per week across the four countries (Figure 7). Households in Italy do the most wash loads per week overall (5.9), while those in Germany do the fewest (4.0). This is in part a function of how many smaller loads are undertaken – with households in Italy more likely than the other countries to report a higher number of ‘half full loads’ and ‘quite full loads’ (1.5 and 1.1, respectively, vs. 0.9 and 0.5 in Germany).

Comparisons with 2016 show a significant decrease in the average number of laundry washes per week in three of the four countries – Denmark (from 5.5 laundry in 2016 to 4.5 in 2019), Germany (4.4 to 4.0) and The Netherlands (6.0 to 4.8). Italy shows no significant change (5.7 to. 5.9).

Figure 7 – Wash temperature most commonly used

Q10. In a typical week (i.e. 7 days) how many of the following types of washing loads will your household do? [Graph shows average number given in each category]

Base: Those with at least some laundry responsibility and a washing machine / washer drier at home (Denmark: 980; Germany: 1,025; The Netherlands: 829; Italy: 1,118). June 2019



There are a number of sub-group differences that are consistent across all four countries:

- **Age**: 18-34s do the most wash loads per week and those 55+ the least. For example, in Denmark 18-34s do an average of 6.3 wash loads vs. 3.2 among those aged 55+.
- **Number of people in the home**: the number of wash loads is positively correlated with the number of people living at home (i.e. wash loads increase as household size increases). For example, in The Netherlands one person homes do 3.0 wash loads per week on average, compared to two person homes (4.7) and three-four person homes (6.0).
- **Children at home**: households with children do more wash loads. For example, in Germany those with children do 5.7 washes per week on average, compared to 3.0 among those with no children living at home.

2.3 Tumble drying

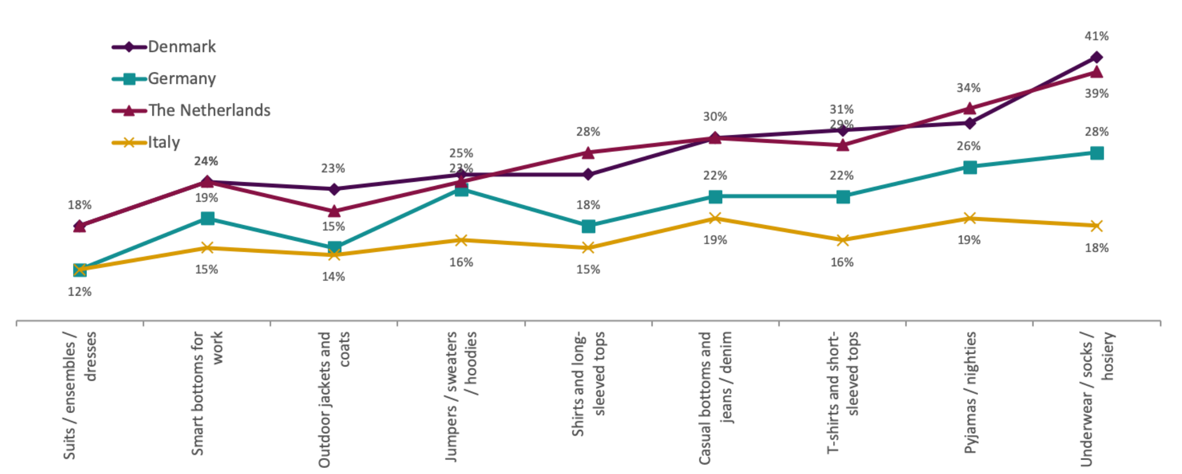
The survey demonstrates that consumers in Denmark and The Netherlands are the most likely to tumble dry a range of clothing types, whereas those in Italy are least likely (Figure 7). For example, in Denmark socks/underwear are tumble dried, on average, 41% of the time (compared to 39% in The Netherlands, 28% in Germany and 18% in Italy). Taking an overall average across the nine items, in Denmark and the Netherlands 28% and 27% of all items, respectively, are tumble dried – compared to 20% of items in Germany and 16% in Italy.

Comparisons with 2016 show a stable pattern in Denmark and the Netherlands where there have been no significant changes – either by individual item or the overall average. There has been a significant decrease in tumble drying in Germany, from an overall average of 23% in 2016 to 20% now. By contrast, while Italy remains the country where tumble drying is least likely overall, there has been an increase in tumble drying (from 13% to 16%).

Figure 8 – Drying behaviour by clothing item category

Q12. How often, if at all do you tumble dry the following items? [Graph shows average score given on a sliding scale from 0% (always air-dry) up to 100% (always tumble dry) – male and female items combined together].

Base: Those with at least some laundry responsibility. Excludes those who don't own an item or wash it away from home. Those without a dryer but who do own each item are assumed to air-dry 100% of the time. June 2019



There are two notable sub-group trends that are consistent across all four countries:

- **Gender**: men are more likely to tumble dry than women. For example, men report a 31% probability of tumble drying an item in Denmark (vs. 25% for women).
- **Main wash temperature setting**: there is a higher probability of tumble drying among those who cite a higher main temperature wash setting. For example, in Germany those whose main setting is 30 degrees have a 18% probability of tumble drying compared to 26% for those who use a setting of 50 degrees or higher. In Denmark, the corresponding figures are 24% (30 degrees) vs. 37% (50 degrees or higher).

2.4 Repair

The survey asked respondents how confident they would be undertaking a series of clothing repairs or alterations (Table 1). The results demonstrate that the majority of consumers in all four countries say they would be confident sewing on a button and removing common stains (although confidence is notably lower in Italy compared to the other three countries). By contrast, fewer would be confident replacing a zip, taking an item in or out, and replacing a pocket. In these areas, consumers in Italy are *more* likely to be confident compared to the other three countries.

Comparisons with 2016 point to very few changes over time. The exception is Germany where fewer consumers say they would be confident undertaking the following: sewing a button (75% vs. 79% in 2016), removing common stains (69% vs. 74%), re-designing an item (28% vs. 33%) and taking an item in or out (17% vs. 21%). Turning to sub-groups within the populations, across every skill and all four countries, women are significantly more confident than men.

Table 1: confidence undertaking clothing repairs and alterations

% who say "I would be confident doing this myself"	Denmark	Germany	The Netherlands	Italy
Sew a button on	75%	75%	70%	**69%** D,G
Stain removal – removing common stains	72%	69%	71%	**61%** all
Darn or patch a hole	52%	46%	**40%** all	48%
Redesign an item (e.g. make shorts from jeans)	**44%** all	28%	29%	**23%** all
Take a hem up or down	**46%** all	30%	35%	32%
Dye an item	35%	32%	29%	**38%** G;N
Replace a zip	25%	25%	25%	**29%** all
Take in or out (change the fit / size)	27%	**17%** all	25%	**36%** all
Replace a pocket	25%	**19%** all	26%	**39%** all

Between one in ten and one in four consumers in each country say that, while they would not currently be confident undertaking the repairs, they would like to learn (Table 2). The skills where interest is highest are replacing a zip (from 20% in The Netherlands to 47% in Italy), followed by taking an item in or out (from 19% in The Netherlands to 44% in Italy). Consumers in Italy report significantly higher levels of interest – for every skill - than their counterparts in the other three countries. Across every skill, 18-34s are significantly more likely to say they would like to learn than those aged 35-54 and 55+.

Table 2: desire to learn to make clothing repairs/changes

% who say "I would like to learn to do this"	Denmark	Germany	The Netherlands	Italy
Sew a button on	11%	10%	12%	**21%** all
Stain removal – removing common stains	14%	13%	14%	**27%** all
Darn or patch a hole	16%	16%	14%	**32%** all
Redesign an item (e.g. make shorts from jeans)	17%	20%	16%	**39%** all
Take a hem up or down	20%	19%	17%	**42%** all
Dye an item	16%	12%	14%	**32%** all
Replace a zip	27%	24%	**20%** all	**47%** all
Take in or out (change the fit / size)	24%	23%	**19%** all	**44%** all
Replace a pocket	22%	19%	17%	**42%** all

3. Disposal

3.1 Levels of disposal

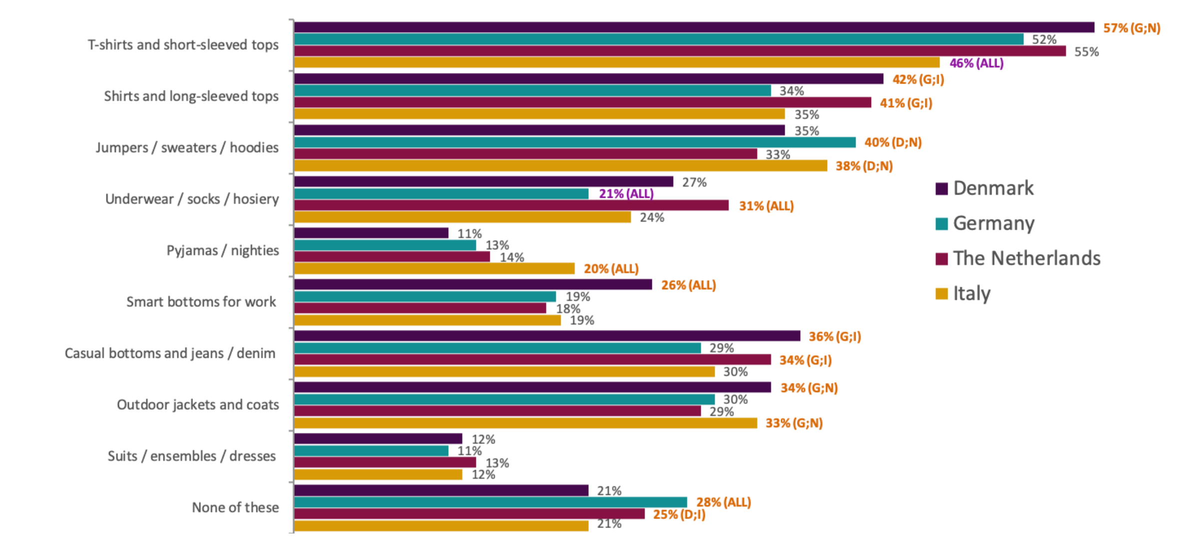
A wide range of clothing items have been disposed of in the past year across the four countries – with T-shirts/short-sleeved tops most commonly cited (by around half of consumers), followed by shirts/long-sleeved tops and jumpers (Figure 9). Fewer consumers have disposed of pyjamas/ nighties or suits/ensembles/dresses.

Disposal patterns vary across the four countries on an item by item basis, although the majority of consumers in all four have disposed of at least one item (from 72% in Germany to 79% in both Denmark and Italy). The average number of 'item types' disposed of is 3.8 in Germany, 3.7 in Denmark and The Netherlands, and 3.4 in Italy (NB. This is not the same as number of items – since consumers could have disposed of multiple items within each clothing type and this is not assessed by the survey).

Figure 9 – Levels of clothing disposal

Q16. Which of the following items, if any, have you passed on, donated, disposed of or sold in the last 12 months?

Base: All (Denmark: 1.046; Germany: 1,113; The Netherlands: 1,117; Italy: 1,226). June 2019



Turning to sub-groups, a gender difference is evident in all four countries with women more likely than men to dispose of more clothing item categories (for example, in Denmark women dispose of 4.3 item types vs. 3.0 for men). There is also an association with frequency of purchase – with high frequency purchasers reporting disposal of more clothing item types. For example, in Germany they have disposed of 3.7 item types in the past year (vs. 3.1 among low intensity clothes purchasers). There is no difference observed across age groups.

3.2 Disposal routes

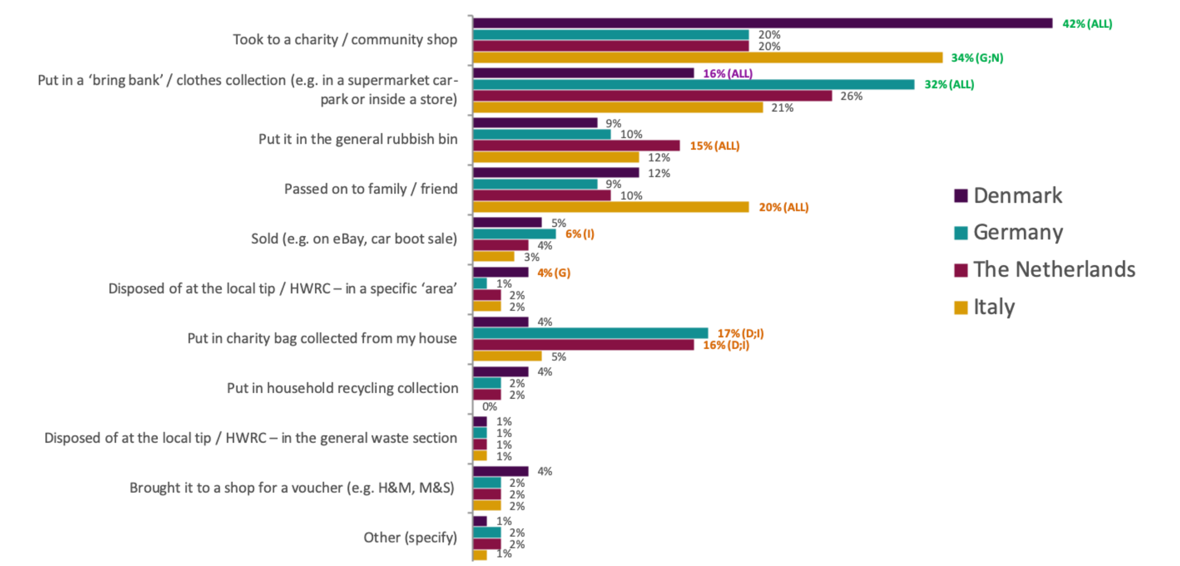
The survey demonstrates several significant differences in respect of how items are disposed of (Figure 10). For example:

- Consumers in Denmark and Italy are more likely to use charity shops – which are used to dispose of 42% and 34% of items, respectively. This compares to 20% of items in both Germany and The Netherlands.
- Consumers in Germany are more likely to use a 'bring-bank' clothing collection point (32% of items are disposed of this way vs. 26% in the Netherlands and 16% in Denmark).
- Consumers in Germany and The Netherlands are more likely to use a charity bag collection (accounting for 17% and 16% of items, respectively) than those in either Denmark or Italy.
- Consumers in Italy are more likely to pass items on to family/friends (20% of items vs. 9% in Germany).

Figure 10 – Disposal routes

Q17. For each of the following, what did you do? [all items aggregated together].

Base: All items disposed of (Denmark: 3,040; Germany: 2,757; The Netherlands: 2,979; Italy: 3,171). June 2019



There have been a number of significant changes since 2016:

- **Denmark**: there has been an increase in the number of items disposed of via a charity/community shop (36% in 2016 to 42% in 2019), and a decrease in the number of items disposed of in the general rubbish (12% to 9%) and 'bring bank' clothing collection points (24% to 16%)
- **Germany**: no significant differences
- **The Netherlands**: there has been a decrease in the number of items disposed of via charity/community shops (24% to 20%) and passed on to family/friends (13% to 10%)
- **Italy**: there has been an increase in the number of items disposed of via a charity/community shop (31% to 34%) and passed on to family/friends (17% to 20%).

There are some sub-groups trends that are consistent across the four countries. On gender, men are more likely than women to dispose of clothing items in the general rubbish, whereas women are more likely than men to pass clothing on to others. Low income households (less than €15,000/year) are also more likely to pass on items to others.

4. Communications

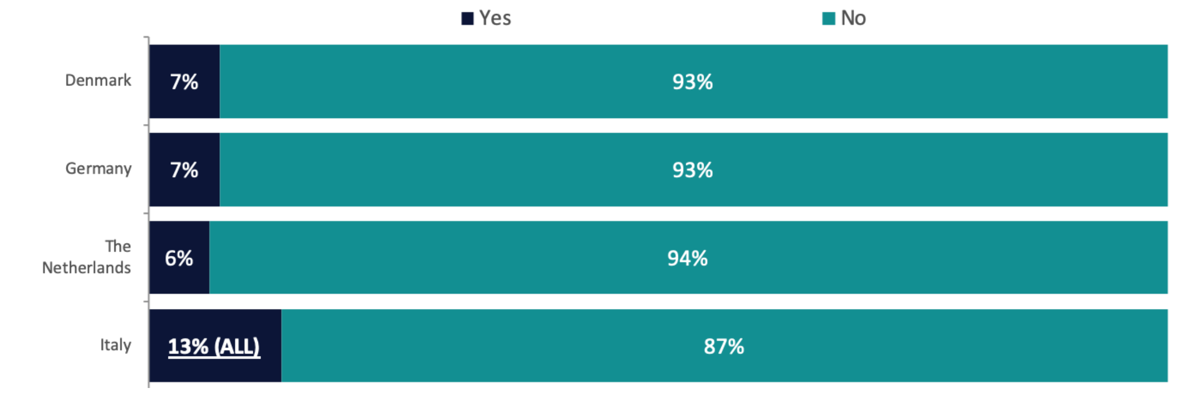
4.1 Love Your Clothes recognition

Around one in fifteen consumers say they have seen LYC in the past year (6% in The Netherlands and 7% in both Denmark and Germany). The exception is Italy where around double this proportion (13%) report seeing LYC.

Figure 11 – Recognition of LYC

Q22A. Have you seen the following brand logo in the past 12 months?

Base: All (Denmark: 1.046; Germany: 1,113; The Netherlands: 1,117; Italy: 1,226). June 2019



There are sub-group differences that are relatively consistent across the four countries:

- **Gender**: men are more likely than average to say they have seen LYC. For example, 9% of men in Denmark say they have seen it vs. 5% of women. This is also true in Germany (8% vs. 5%) and the Netherlands (9% vs. 5%) - but not in Italy (14% vs. 12%).
- **Age**: younger consumers aged 18-34 are more likely than average to say they have seen LYC. For example, in Italy 21% of 18-34s say they have seen it vs. 5% of those aged 55+. This is also true in Denmark (13% vs. 2%); Germany (18% vs. 1%) and The Netherlands (12% vs. 4%).
- **Clothes shopping frequency**: recognition of LYC is highest among high frequency clothing purchasers. For example, in Germany 20% of this group say they have seen LYC vs. 2% of low frequency purchasers. This is true of all four countries.

5. #Lovenotlandfill campaign

5.1 Overview

Another element of ECAP undertaken by LWARB (London Waste and Recycling Board), aimed at encouraging sustainable clothing behaviour for young Londoners aged 16-24 years. The #LoveNotLandfill campaign activity was based on the messages of #LoveYourClothes but were adapted to give the best chance of engaging with the target audience. The campaign delivered a dynamic set of very simple messages designed to start young Londoners on their journey to a more sustainable relationship with fashion.

Key messages include:
- Buy second-hand
- Care, mend and repair
- Recycle ALL clothes – nothing in the bin

Some insights from this project compliment the research done within this report and a brief summary of the relevant insight follows below. The purpose of this was to first establish and then track consumer behaviour in London for 16-24 year olds for clothing purchase, care, maintenance and disposal, as well as to establish the reach of the #LoveNotLandfill campaign.

Methodology

Two online surveys were undertaken in London for 16-24 year olds. Wave 1 was conducted over the period 10-18 October 2017 and Wave 2 between 12-22 July 2019.

The overall sample was only for 16-24 year olds living in London boroughs. The final sample size in 2017 and 2019 was 500.

Some questions were asked in both surveys to enable comparisons across time (i.e. to observe any impact on attitudes and/or behaviours). Other questions were asked in one of the surveys only, in order to generate insights for WRAP and its partners (i.e. to support strategic targeting or the development of specific campaigns). Only questions relevant to this report have been included here.

Statistical tests have not been performed on these results.

5.2 Clothing acquisition

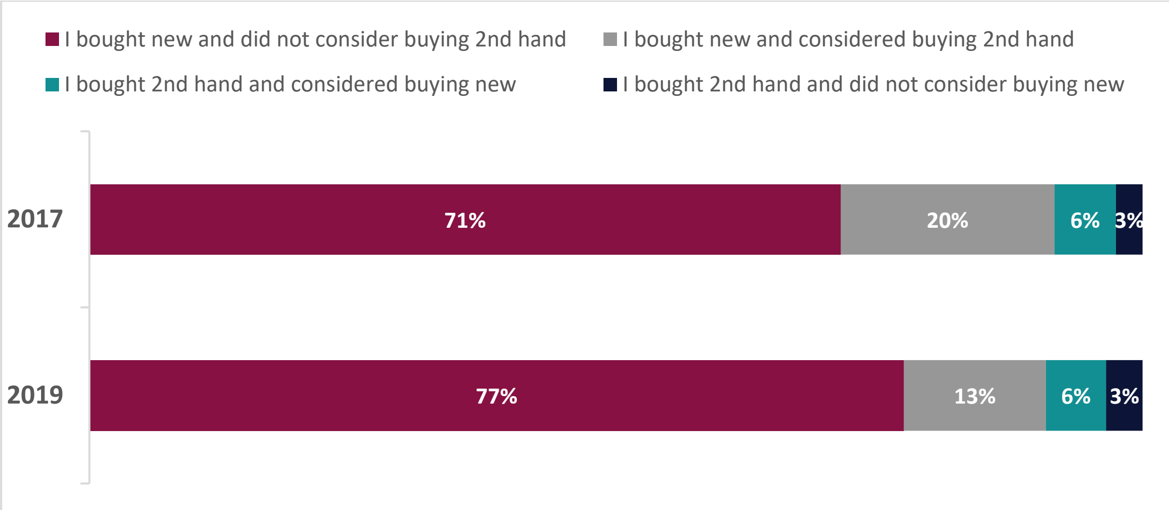
5.2.1 New vs. second-hand acquisition

To asses new vs. second-hand acquisition, the questionnaire used a construct of asking about the last three clothing purchases and – for each of these – whether they were purchased new or second-hand (also whether a new or second-hand option was considered as an option).

The 2017 and 2019 results demonstrate limited levels of second-hand consideration and acquisition. Between 2017 and 2019, the percentage of people who bought new and considered buying second-hand decreased, whilst the percentage of people who bought second-hand remained stable.

Figure 12 – New vs. second-hand purchases over time

Q1B. What were the last three items of clothing you bought? How did you buy these types of clothing?
Base: All items bought (2017: 1218; 2019: 2,500)



5.2.2 Clothing longevity

To assess clothing longevity, the survey asked respondents to consider two things for a range of items they own: (a) how long ago they acquired it and (b) how much longer they expect to continue wearing it. The combination of these two answers gives an estimated longevity across a range of items. An extra category, sportswear, was also included in this survey.

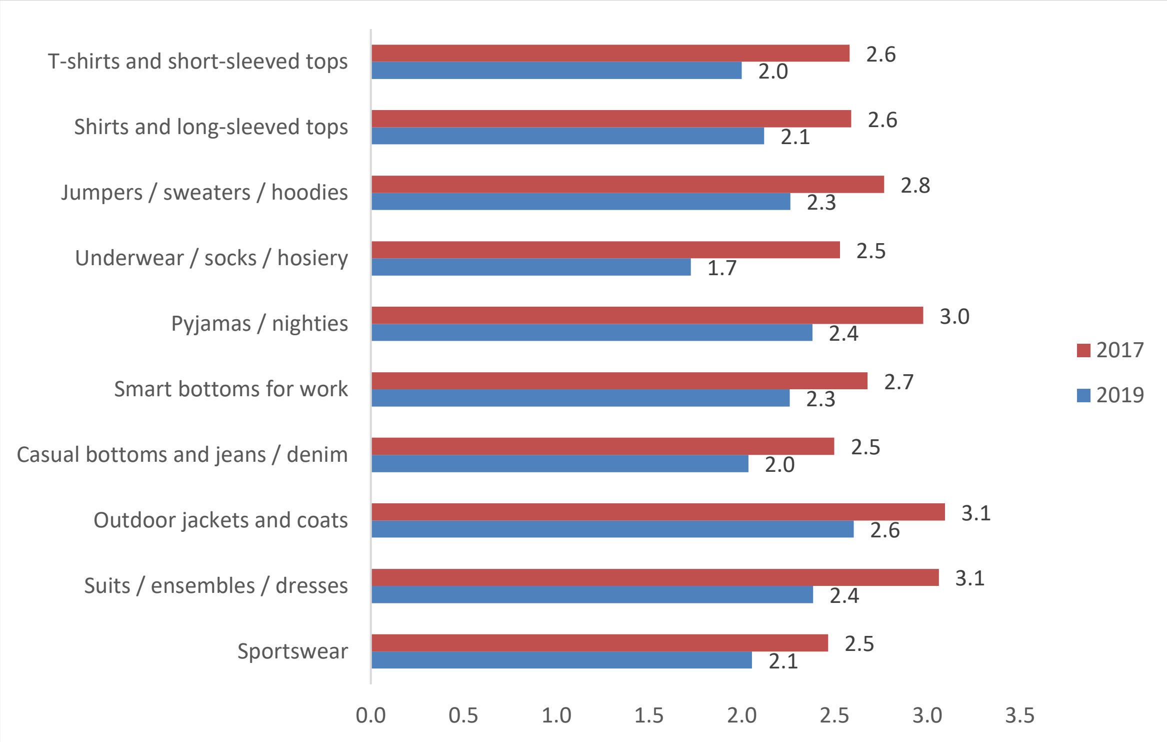
The results demonstrate that the estimated life span for the clothing of young Londoners is much lower than that of the Denmark, Germany, and the Netherlands and still even lower than Italy. It also shows that the estimated life span has decreased in 2017-2019.

The overall average across the nine items shows an estimated longevity of 2.7 years in 2017 and 2.2 years in 2019.

Figure 13 – Estimated longevity

Q2a+b. Thinking of the last item you wore for each category a) how long ago did you acquire it, and b) how much longer do you think you will wear this item?

Base: 500 (2017 and 2019)



5.3 Clothing care behaviour

5.3.1 Repair

The survey asked respondents how confident they would be undertaking a series of clothing repairs or alterations (Table 3). The results demonstrate that the majority of young Londoners say they would be confident sewing on a button and removing common stains (although confidence is notably lower than the European nations). By contrast, fewer would be confident replacing a zip, taking an item in or out, and replacing a pocket.

Confidence has dropped or remained mostly stable in the time between 2017 and 2019.

Table 3: confidence undertaking clothing repairs and alterations

% who say "I would be confident doing this myself"	2017	2019
Sew a button on	56%	54%
Stain removal - removing common stains	52%	50%
Darn or patch a hole	38%	35%
Redesign an item e.g. make shorts from jeans	36%	33%
Take a hem up or down	30%	25%
Dye an item	35%	30%
Replace a zip	26%	20%
Take in or out (change the fit / size)	32%	27%
Replace a pocket	26%	20%

The skills where interest is highest are replacing a zip, followed by taking an item in or out. Young Londoners report significantly higher levels of interest, for every skill, than their counterparts in; Denmark, Germany, the Netherlands, and Italy.

Table 4: desire to learn to make clothing repairs/changes

% who say "I would like to learn to do this"	2017	2019
Sew a button on	30%	32%
Stain removal - removing common stains	34%	39%
Darn or patch a hole	41%	42%
Redesign an item e.g. make shorts from jeans	38%	43%
Take a hem up or down	45%	46%
Dye an item	41%	42%
Replace a zip	51%	55%
Take in or out (change the fit / size)	45%	48%
Replace a pocket	47%	51%

5.4 Disposal

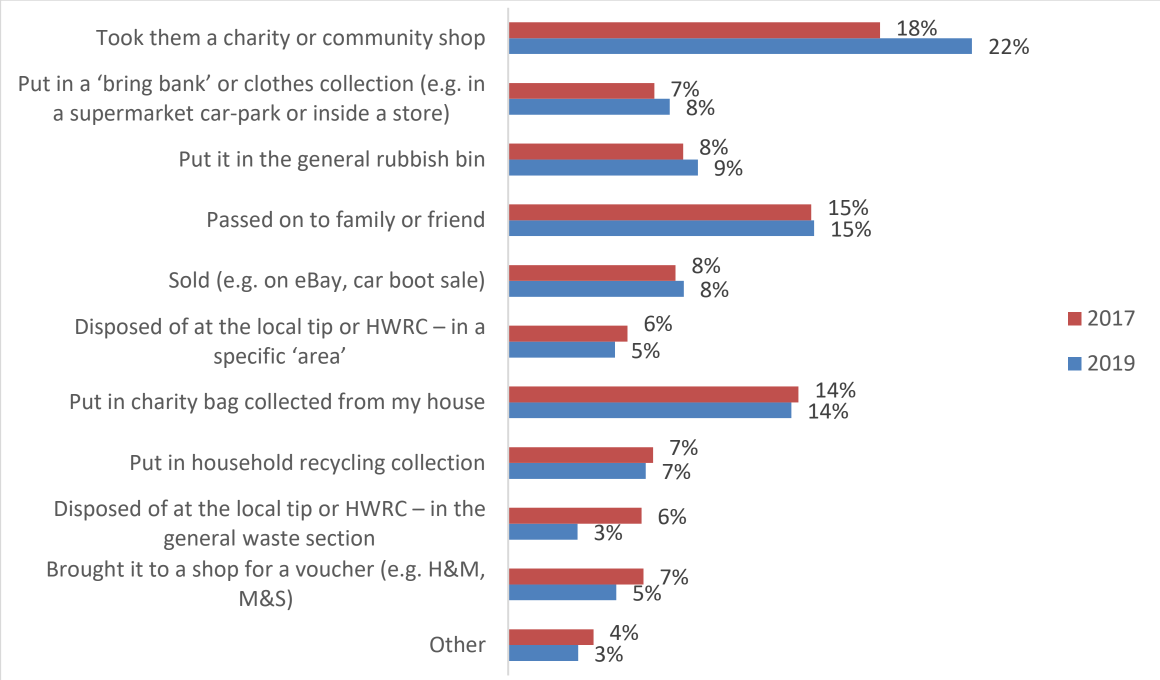
5.4.1 Disposal routes

The data available for levels of disposal is not quite comparable to the data available for; Denmark, Germany, the Netherlands, and Italy. However comparable data is available for disposal routes for both 2017 and 2019.

Figure 14 – Disposal routes

Q4. If you passed on, donated, disposed of, or sold in the last 12 months what did you do?

Base: All items disposed of (2017: 3,232, 2019: 3,256)



- Charity shop is the most likely disposal route in both 2017 and 2019
- The charity shop route saw the biggest increase in use between 2017 and 2019
- Disposal through non reuse/recycling routes decreased from 2017 to 2019
- Comparison of disposal routes between countries is difficult due to the variance and availability in options.

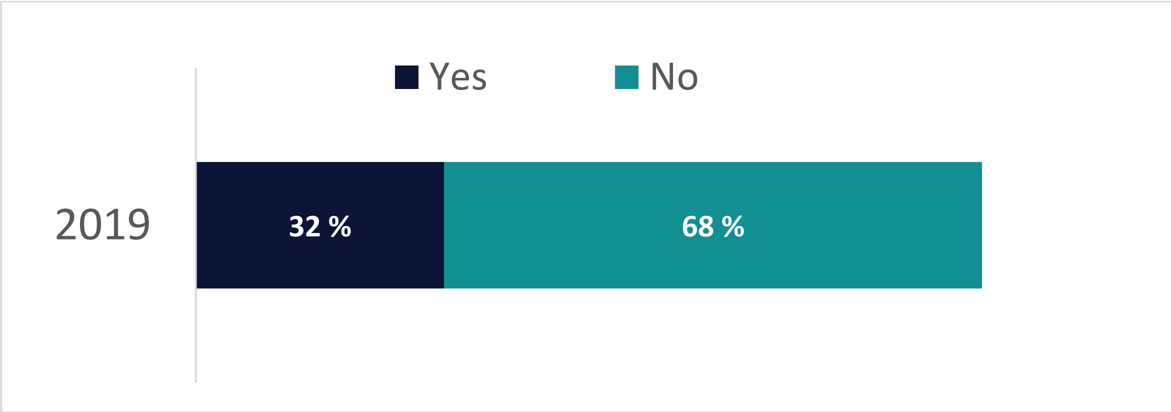
5.5 Communications

5.5.1 #LoveNotLandfill recognition

This data is only available for 2019 as the 2017 survey acted as a baseline before the campaign was rolled out. Almost one third of young Londoners say they have seen #LoveNotLandfill.

Figure 15 – Recognition of #LoveNotLandfill

Q8. Have you heard of the #LoveNotLandfill featured above?
Base: 500 (2019)



There are sub-group differences that can be analysed for this question

- **Gender**: men and women are equally likely to have seen the campaign
- **Age**: Those aged 19-21 are most likely to have seen the campaign (37%), compared to 16-18 (28%) and 22-24 (29%)
- **London borough**: Campaign recognition varies significantly by borough with a range of 0% to 60%. However, the sample sizes for the individual boroughs can be very small.

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