Welcome to the BLUEPRINT Circular Economy Roadshow

The session will begin soon

projectblueprint.eu

Housekeeping

REC This session will be recorded

Use the chat/Q&A box for your questions

Please leave feedback

No more fast fashion: The role of textiles in the circular economy

1. Kresse Wesling, Elvis & Kresse
2. Diya Salhab & Natalie Monteiro, EcoWise
3. Gerrard Fisher, QSA Partners LLP
4. Jose Baladron, TRAID

BLUEPRINT Project
Wardrobe Survey Results

Date: May 2022
Authors: Diya Salhab, Natalie Monteiro, Rembrandt Koppelaar
http://www.eco-wise.co.uk

About BLUEPRINT and EcoWise

- **BLUEPRINT to a circular economy** is an Interreg EU funded project with a budget of 5.6 million euro lasting from April 2020 to March 2023

- Led by **Essex County Council,** the project seeks to enable local authorities to accelerate towards a circular economy

- **EcoWise** is a **digital solutions provider** active in BLUEPRINT in creating new approaches to plan and measure progress towards a circular economy

BLUEPRINT Wardrobe Survey purpose

Our wardrobe survey:

- Online survey from October 2021 to December 2021
- Prize draw was provided as an incentive
- 700+ responses of which 475 from Essex residents

Purpose of the wardrobe survey:

- To provide insights in the **number of clothes in circulation, their use and disuse, and what people do with their clothes at end-of-life**

- To provide local authorities & textile re-use organisations with a **new approach to collect information** to steer towards a **circular clothing economy**

Structure of the wardrobe survey

The online survey included 3 sections:

Section 1. **Socio-demographic characteristics (9 questions)**

Section 2. **Ownership and use of clothing (5 questions)**
- Number of clothing items and types that are in use
- Clothes stored at home but disused

Section 3. **Purchasing and end-of-life (4 questions)**
- Acquisition (new, second-hand, homemade, handovers)
- Acquisition (number of clothing acquired within 3 months)
- End-of-use (disposed, sold, or given away)

5 → How many people, including yourself, live in your household? *

OK ✓

23 → What happens with the items of clothing that you throw or give away? Please mark options from "almost never" to "very often". *

	Almost never	Occasionally	Sometimes	Often	Very Often	N/A
Throw away in waste/black bag	○	○	○	○	○	○
Donate to second-hand or charity shops directly	○	○	○	○	○	○
Give to a family member/friend	○	○	○	○	○	○
Sell online or at flea markets	○	○	○	○	○	○

1. Descriptive statistics

Gender distribution

Distribution of survey respondents across gender

Female	Male	Non-binary
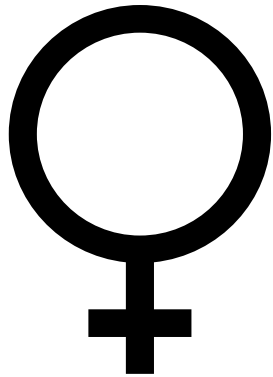
Percentage - 88.6%
Number - 628
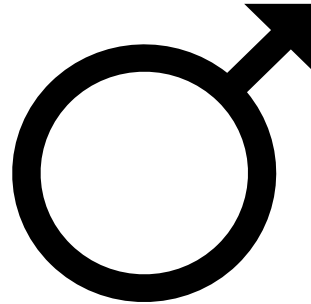
Percentage - 10.3%
Number - 73
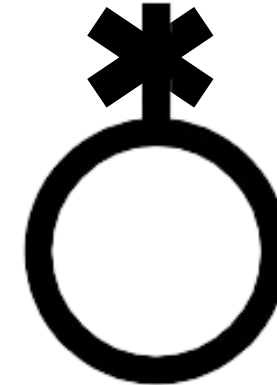
Percentage - 0.4%
Number - 3

Age distribution

Distribution of survey respondents across age ranges

15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
0.6%	2.3%	5.9%	6.2%	8.9%	10.2%	9.2%	12.7%	11.0%	12.6%	19.9%

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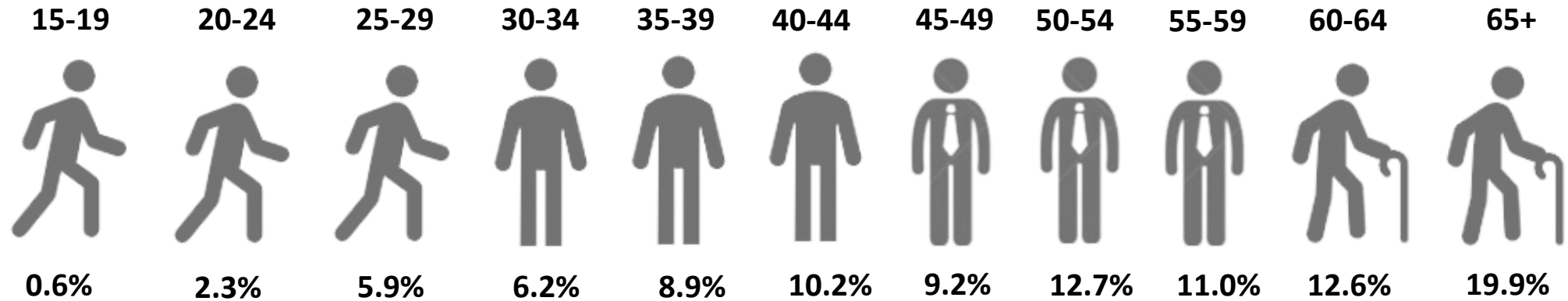
Income distribution

Distribution of survey respondents across income ranges
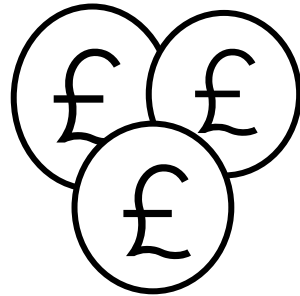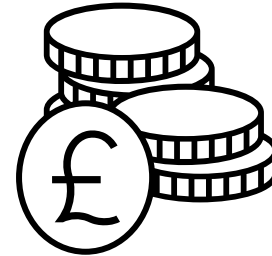
£0 - £12,500	£12,501 - £25,000	£25,001 - £35,000	£35,001 - £55,000	£55,001 - £90,000	£90,000+
17.9%	24.4%	18.6%	13.1%	5.8%	2.1%

2. Purchasing behaviour insights

Income and spending in relation to clothing acquisition

People with a higher income and expenditure on clothes **tend to purchase far more newly made clothing**

*The influence of **income** on clothing acquisition*
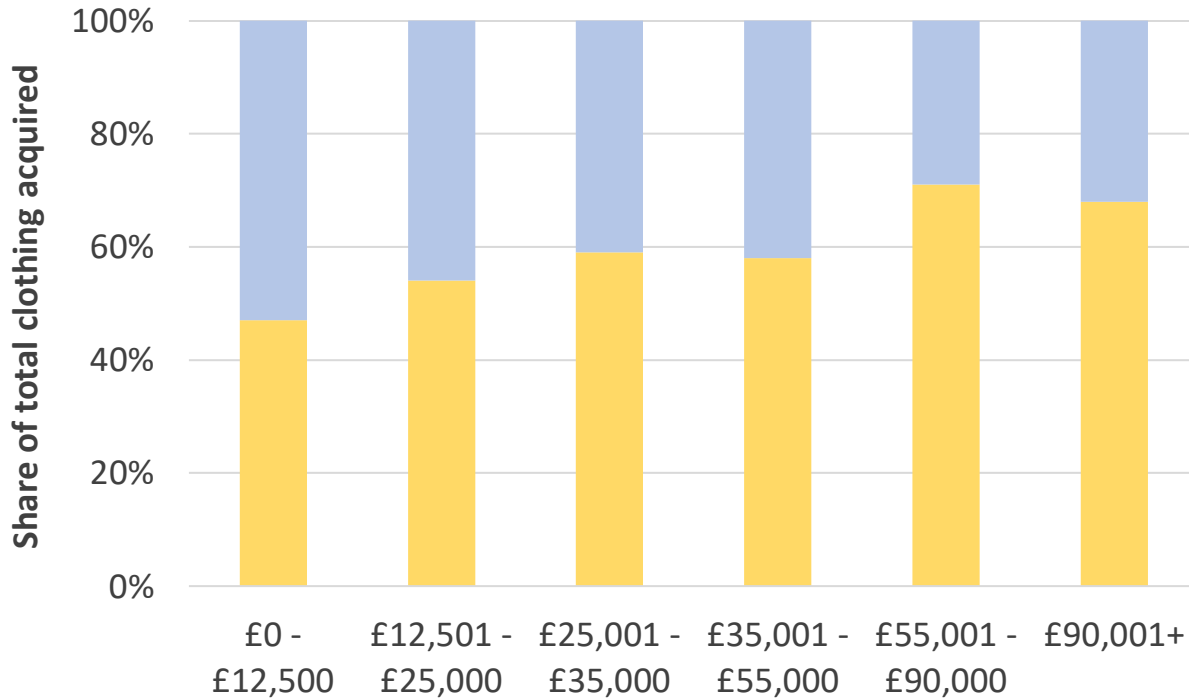
*The influence of **spending** on clothing acquisition*
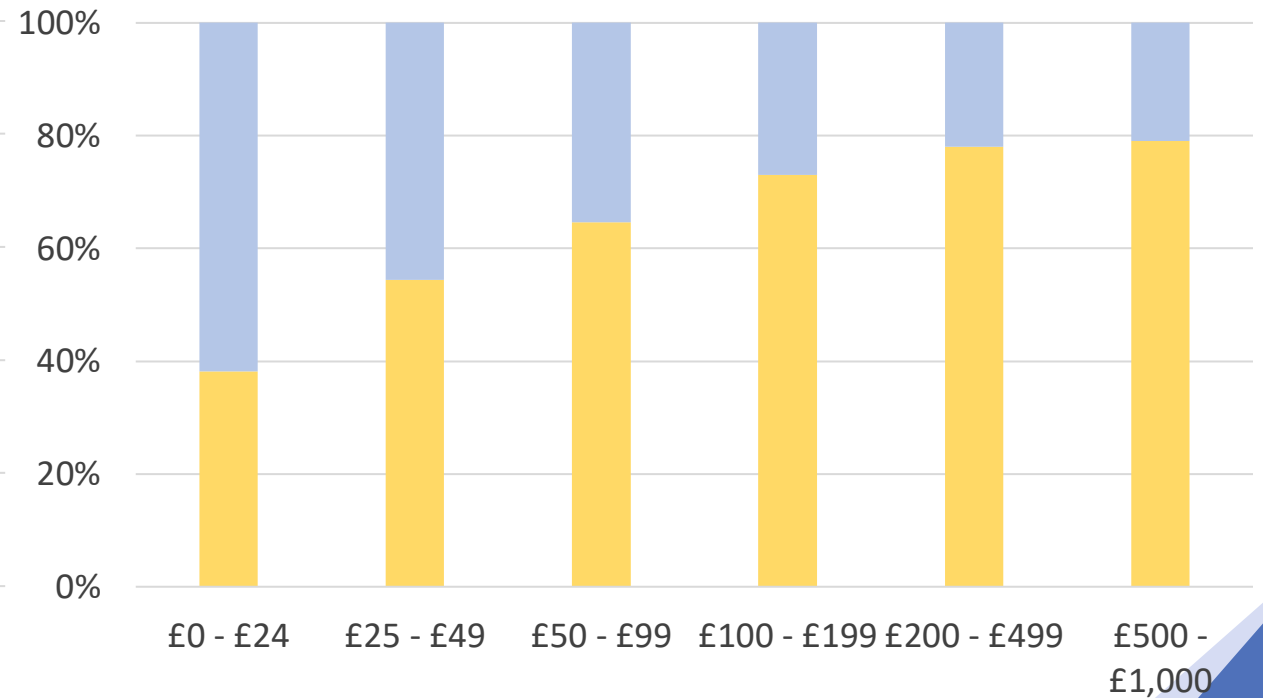
The influence of gender on clothing acquisition

Male respondents (blue) acquire on average **44% of their clothes from second-hand**, homemade or other routes
Female respondents (yellow) acquire on average **53% of their clothes from second-hand,** homemade or other routes
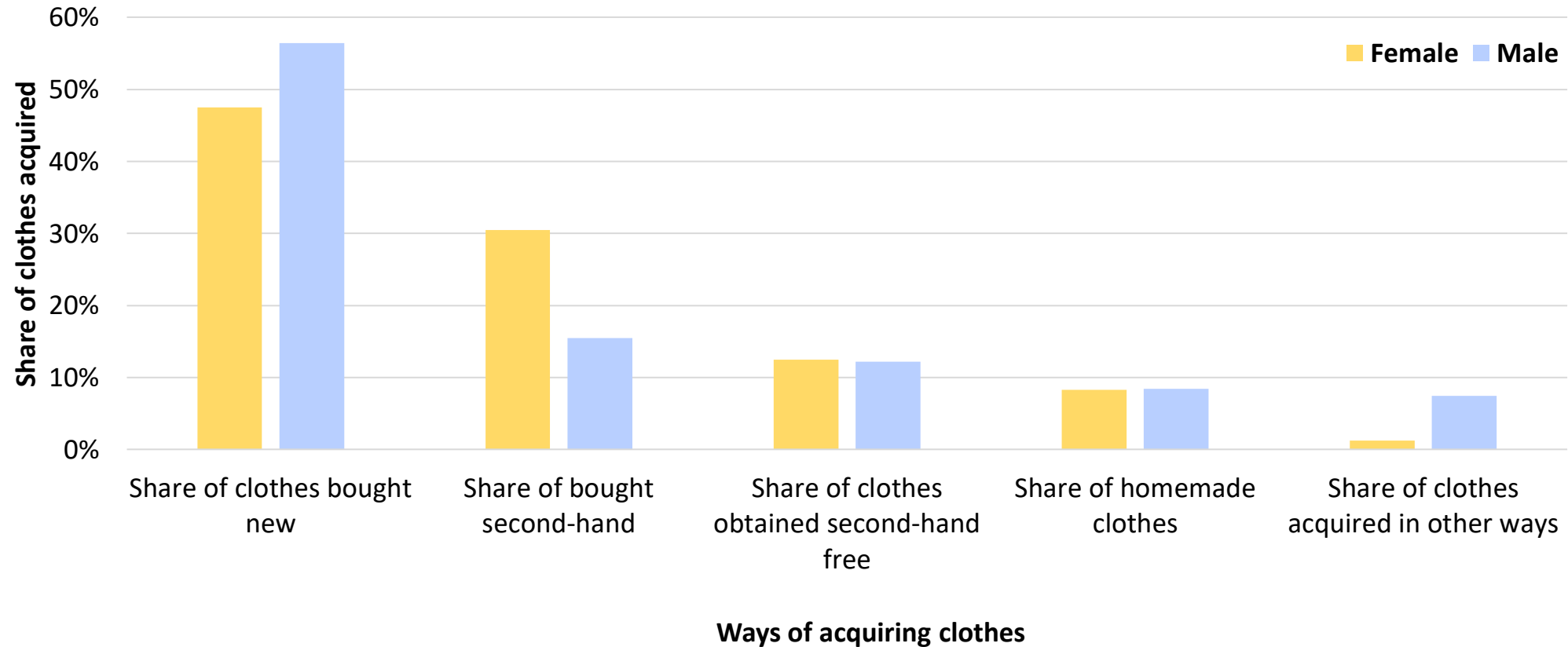
The influence of age on clothing acquisition

People in their late 20s and in their 30s acquire a larger share of clothes **second-hand** than other age groups
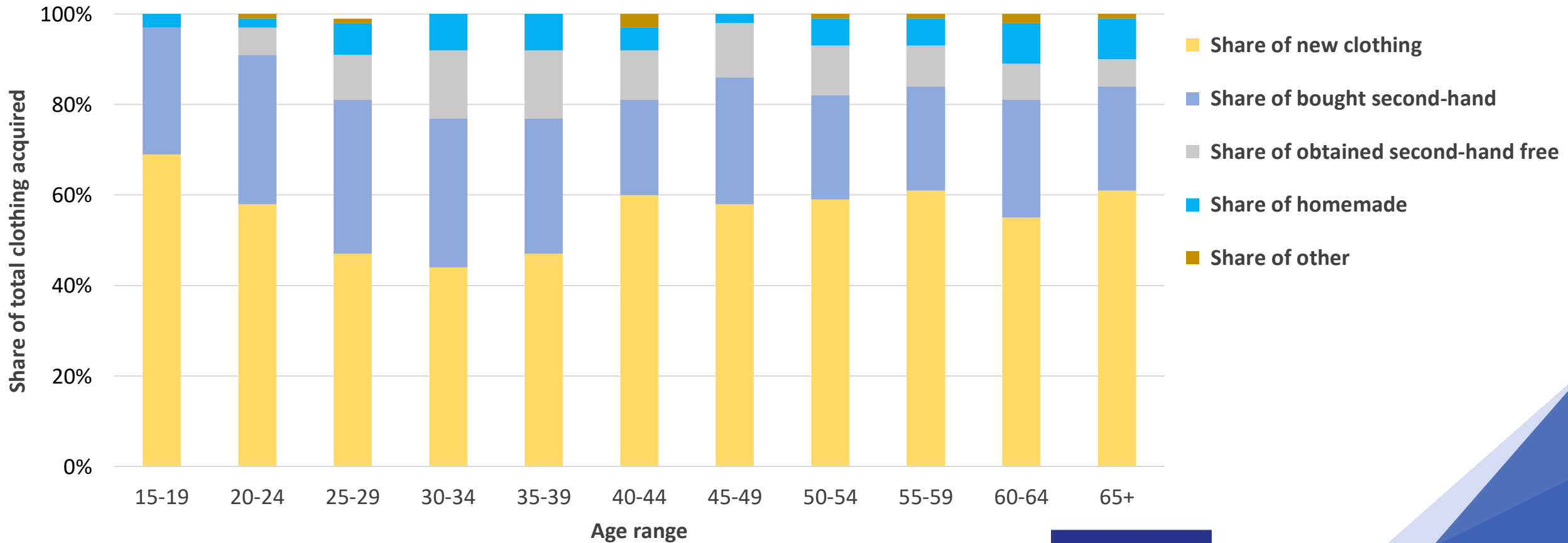
3. Ownership insights

Average ownership of clothing and disuse of the most common wardrobe items

On average respondents:

Own 25 jumpers and cardigans (incl. hoodies) of which **15% are disused**
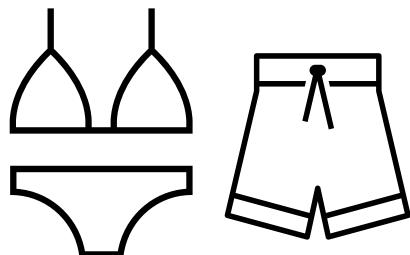
Own 23 underwear and swimwear of which **13% are disused**
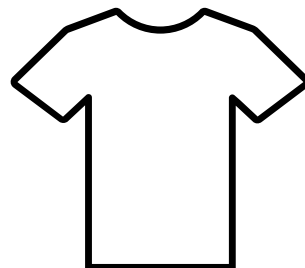
Own 22 t-shirts and tops (incl. shirts/vests/blouses) of which **24% are disused**
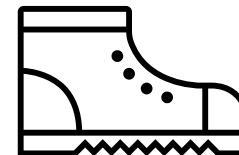
Own 15 pairs of shoes (incl. sports shoes, slippers) of which **31% are disused**

Own 14 trousers of which **16% are disused**

Clothes owned and worn in relation to gender and income

An increase in income is associated with **a higher clothes ownership up to an income of £55,000**; Clothes **disuse grows with rising incomes** except for people earning £90,001 or more per year

- Male respondents stated that they wear all the clothes they own

- Female respondents own on average 36% more clothes than male respondents, and disuse 22% of clothes they own

Chart legend:
- Average number of clothes owned
- Average number of clothes worn

Y-axis: Number of clothes (0, 50, 100, 150, 200, 250)

X-axis (Income range): £0 - £12,500 | £12,501 - £25,000 | £25,001 - £35,000 | £35,001 - £55,000 | £55,001 - £90,000 | £90,001+

4. End-of-use insights

End of use routes that people use

Re-use routes

- **61%** of respondents state they **often to very often donate** to second-hand or charity shops

- **52%** of respondents **sometimes give clothes** to family members or friends and **53% sometimes put clothes in a clothing bank**

- **49%** of respondents sometimes **repurpose clothes at home**

Disposal routes

- **38%** of respondents **sometimes to very often** put their discarded clothes in a **recycling bag at home.** The majority of these respondents do not live in areas where clothing is collected from home

- Most respondents stated they almost never throw away clothes in a **waste/black bag** and **18%** state they **sometimes to very often use this route**

People want to recycle their clothes and a substantial share **contaminate their recycling,** including many respondents that acquire the majority of their clothes second-hand. More efforts are needed to enhance end of use routes

Age in relation to selling clothes and clothing banks use

Younger respondents often sell clothes online or at flea markets relative to older respondents

*The influence of age on **selling clothes online or at flea markets***

Older respondents in their 30s, 40s, 50s, 60s and beyond more commonly use clothing banks than younger people

*The influence of age on using **clothing banks***
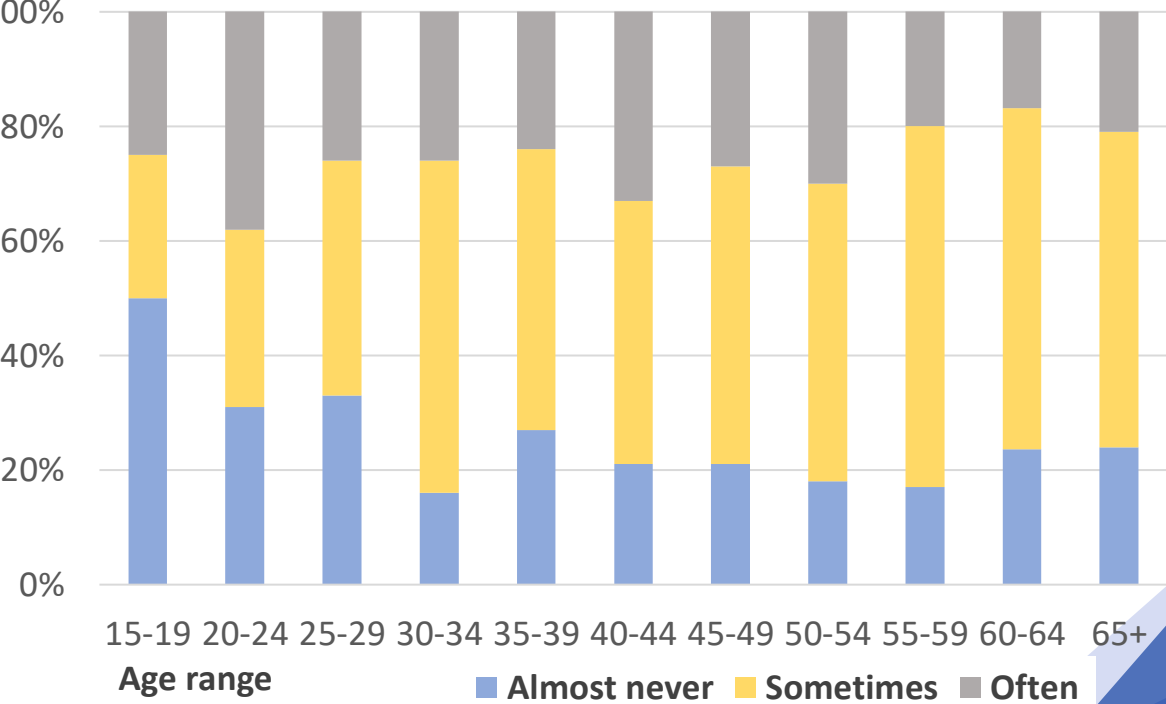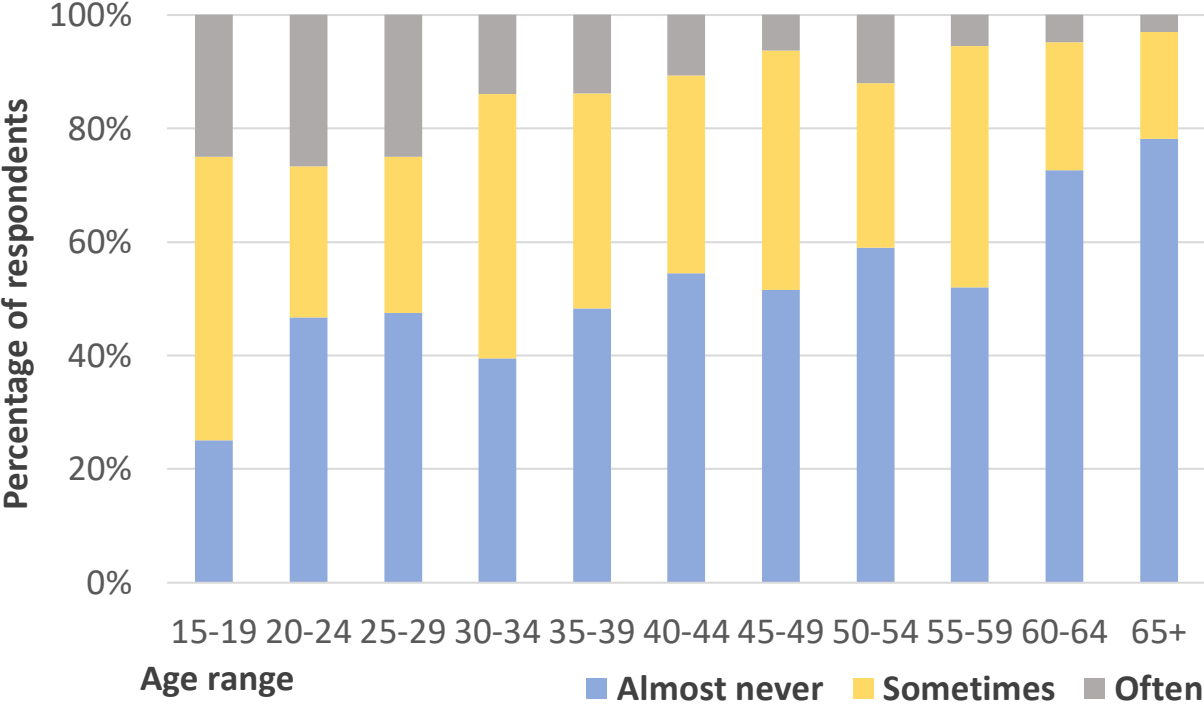
Donations of clothes to charity shops in relation to gender and income

- Of **female respondents** 63% donate their clothes often to charity shops, while 33% of **male respondents** state they do so

- Most respondents donate clothes. However, the frequency of donations changes once annual income reaches £55,000 as those respondents donate less often/very often

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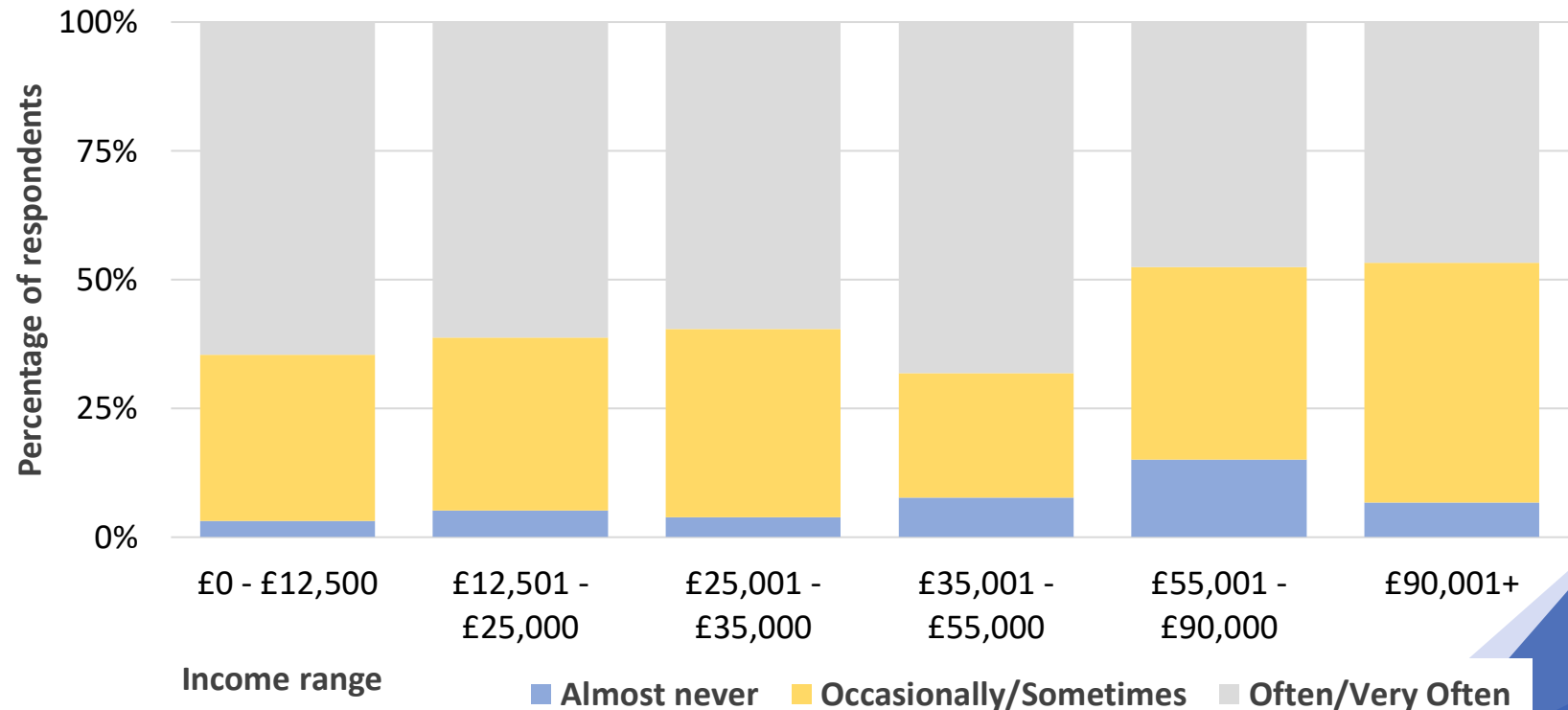
Number of clothes removed in relation to the number of clothes acquired

- The **higher** the number of **clothing items acquired the lower** the number of clothing items **donated, sold or thrown** away

- The average respondent **acquires between 4 to 10 items** and gets **rid of 3 to 8 items** every three months
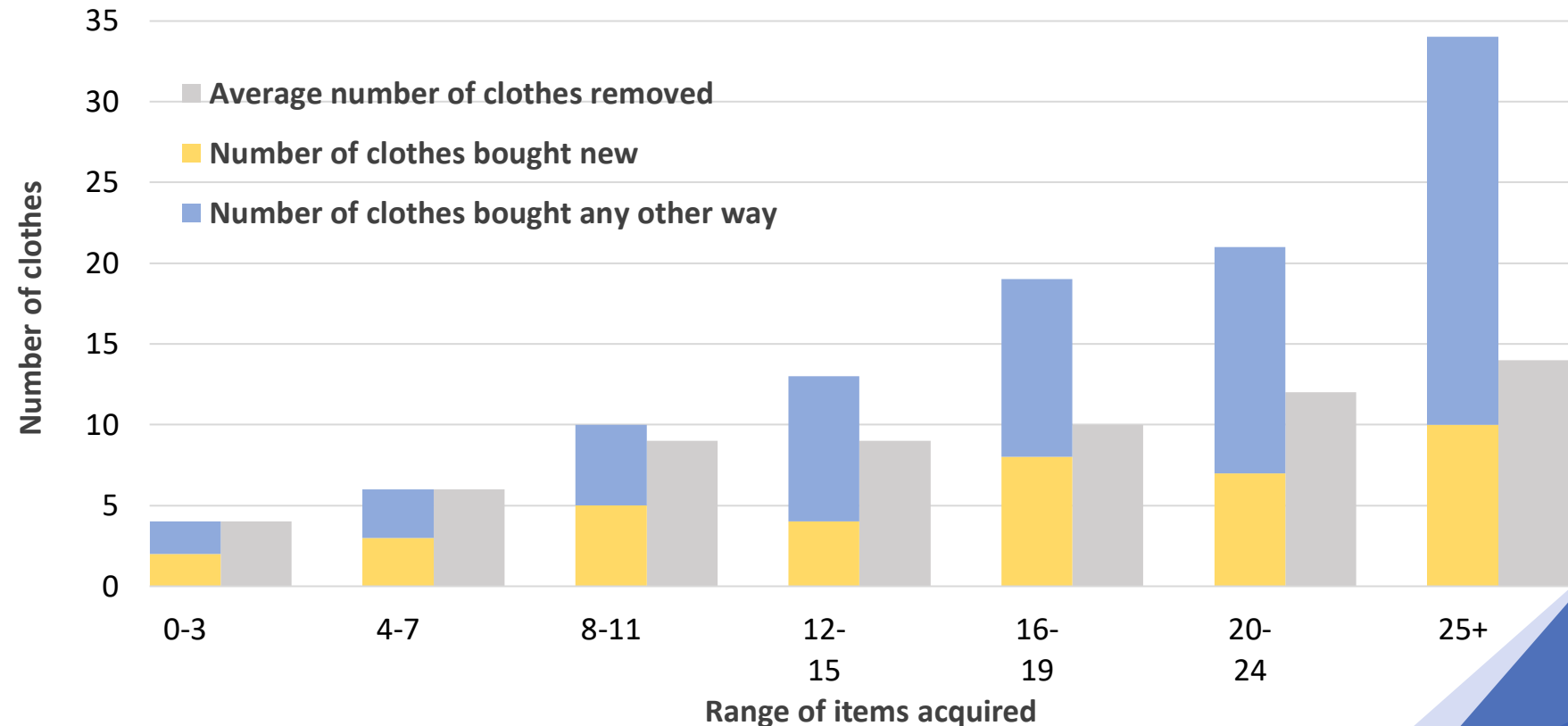
5. Recommendations

Four recommendations for clothing sustainability

No.	Survey key observation	Recommendation
1	**38%** of respondents **sometimes to very often** put their discarded clothes in a **recycling bag at home**	Improved outreach is needed to **communicate that in all cases people should bring their clothes to clothing banks, charity shops or sell their clothes directly**
2	**Male respondents acquire on average 44%** of their clothes from second-hand or homemade routes; **female respondents acquire 53% of clothes** from the same routes	Specifically **reaching out to men in second-hand clothing campaigns** is recommended to increase their impact
3	The average respondent **owns 181 items of clothing, wears 147** of them. On average out of owned items **27 are acquired via second hand or similar routes**	At least 2 out of 10 items in people's wardrobes are disused. Campaigns to **popularise an annual wardrobe spring cleanout** can help to improve clothing sustainability
4	**49%** of respondents sometimes **repurpose clothes at home**	**Encouraging local repurposing of clothes is an unexplored area** by clothing charity networks, with many respondents already carrying out repurposing efforts

Thank you

Contact information

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No more fast fashion: Circular business models

11 May 2022

About QSA Partners

We are experts in circular business models and sustainability.

Our mission is to help companies improve their business and environmental performance through better circular models and more sustainable practices.

Aligning market incentives with customer needs *and* sustainability objectives can deliver the major changes we need to see in order to tackle the climate crisis.

Certified

B

Corporation

This company meets the highest standards of social and environmental impact

Circular business models

A way of looking at your business through a different lens

Refocusing your business on what your customers really need & want

A lower impact way to serve the market

Making stuff is half the climate problem

See https://ellenmacarthurfoundation.org/completing-the-picture

34
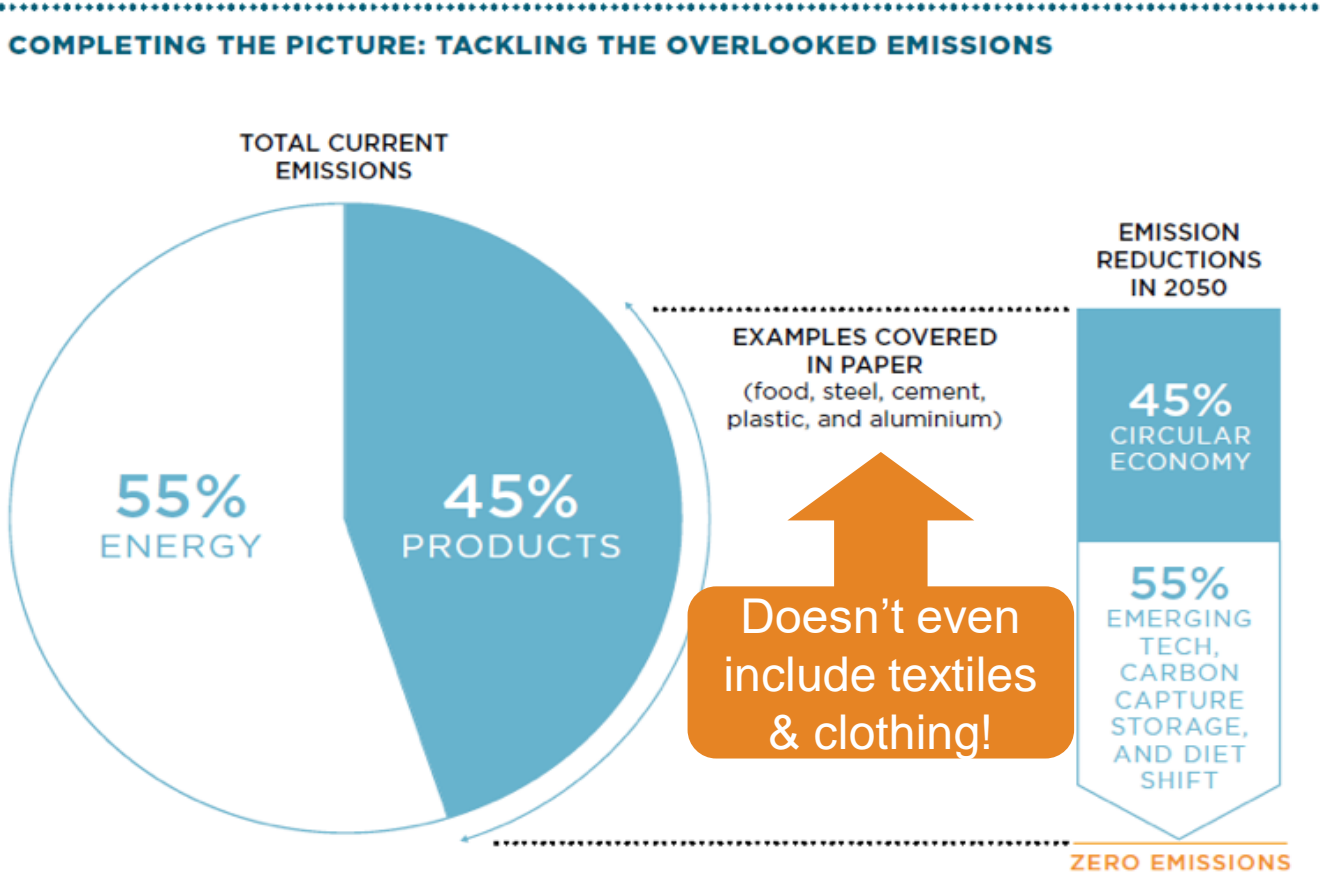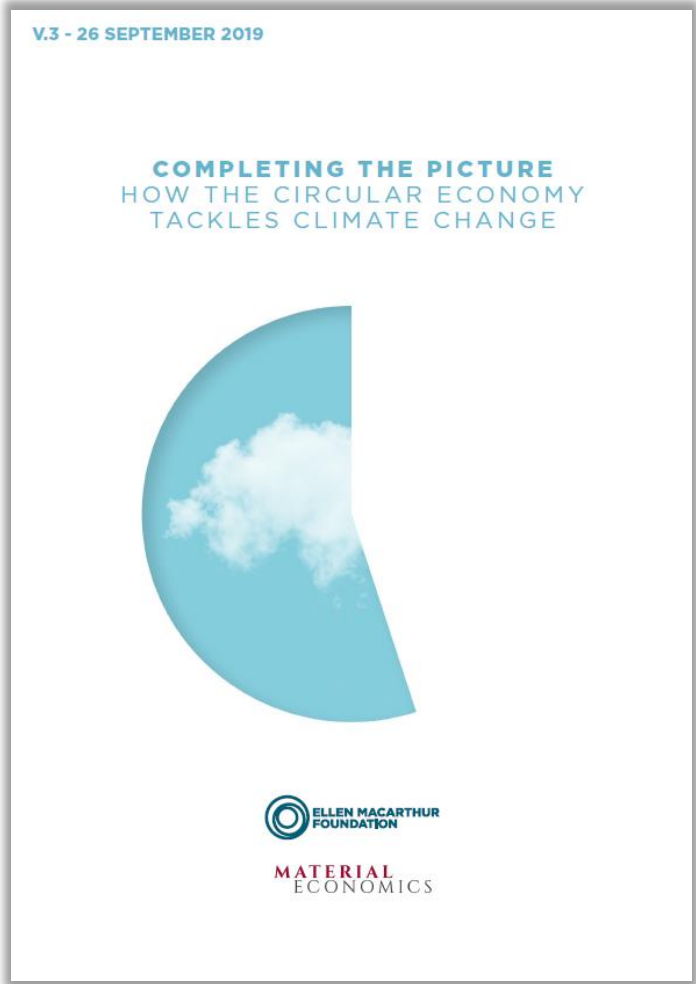
Recycling is not the whole answer

Relative climate impact of selected circular actions

Restorative economy
e.g. reuse and refurbishment

Lifetime optimisation
e.g. using goods for as long as possible

Goods to services
e.g. renting instead of buying

Recycling

See https://wrap.org.uk/sites/default/files/2021-02/WRAP-Meeting-the-UK-climate-change-challenge-The-role-of-resource-efficiency-Executive-summary.pdf
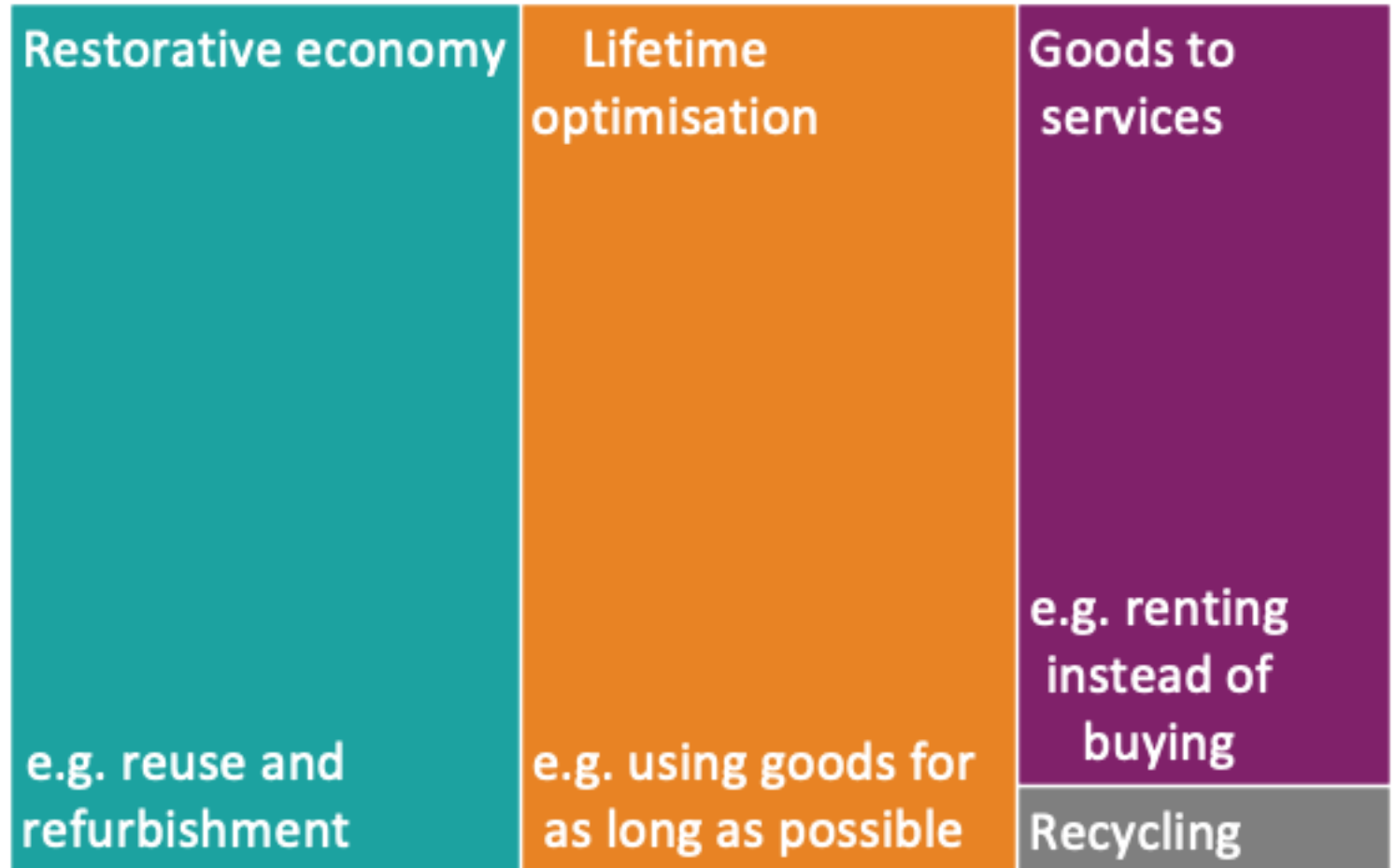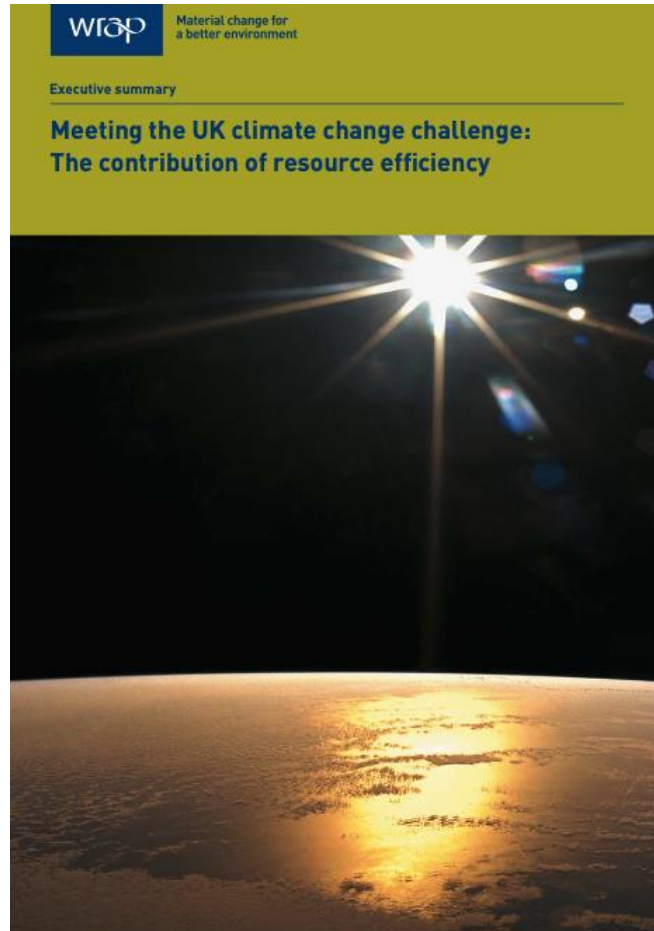
Institute of Positive Fashion

The circular fashion ecosystem: a blueprint for the future

QSa Partners

THE ENVIRONMENTAL AND SOCIAL FOOTPRINT OF THE UK AND GLOBAL FASHION SECTOR

50% of workers in countries such as India and Bangladesh are not paid minimum wage[34]

20% of industrial water pollution world-wide is from the global dyeing and treatment of textiles[35]

26 MILLION tonnes estimated carbon footprint of UK fashion sector in 2016[36]

THE UK DEMAND FOR NEW CLOTHING

17% of young people wouldn't wear an outfit again if it has appeared on their Instagram[37]

16KG of new clothing is bought annually per person in the UK, higher than that of other high-income countries like France, Sweden, and Italy[38]

4 BILLION pieces of apparel purchased in the UK in 2019[39]

60% of the total waste associated with the clothing lifecycle arises from final disposal[40]

THE END-OF-LIFE OUTCOMES OF CLOTHING PURCHASED IN THE UK

60% of clothing collected for reuse and recycling was exported in 2017[41]

20% of clothing discarded in household waste in the UK went to landfill[43]

80% of clothing discarded in household waste in the UK was incinerated in 2017[44]

3% of clothing collected in the UK was recycled in 2017[42]

600,000 tonnes of used textiles collected for reuse and recycling in the UK in 2017[45]

BEHAVIOUR OF OUR HIGH INTENSITY SHOPPERS

6 is the average number of items purchased per month

50% clear items to free up wardrobe space each month

63% of 18-34 year olds already purchase used items

37% use clothing rental services

58% repaired clothing either at home or professionally

Who we must influence the most

IPF target outcomes

Reduced volume of new physical clothing

Through circular and sharing business models, extended product lives, consumer empowerment and digital innovation, the UK fashion market could retain revenue and profitability at the same time as significantly reducing the volume of new physical product and material supply.

Maximised utilisation through product circularity

Through improved conditions for reusing garments, the value and enjoyment of every garment produced is maximised.
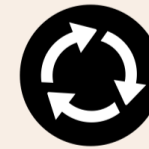
Optimised sorting methods and materials recovery

Through infrastructure and technologies that ensure advanced and efficient methods for sorting used clothing, optimal 'next lives' can be ensured. Rewearable items can be recovered for repair and reuse while sorting of non-rewearables provide the quality feedstock needed for improved recycling.

Fully circular with emphasis on value

Recycle

Make

Remanu facture

Use

Repair

Reuse

Greatest value here

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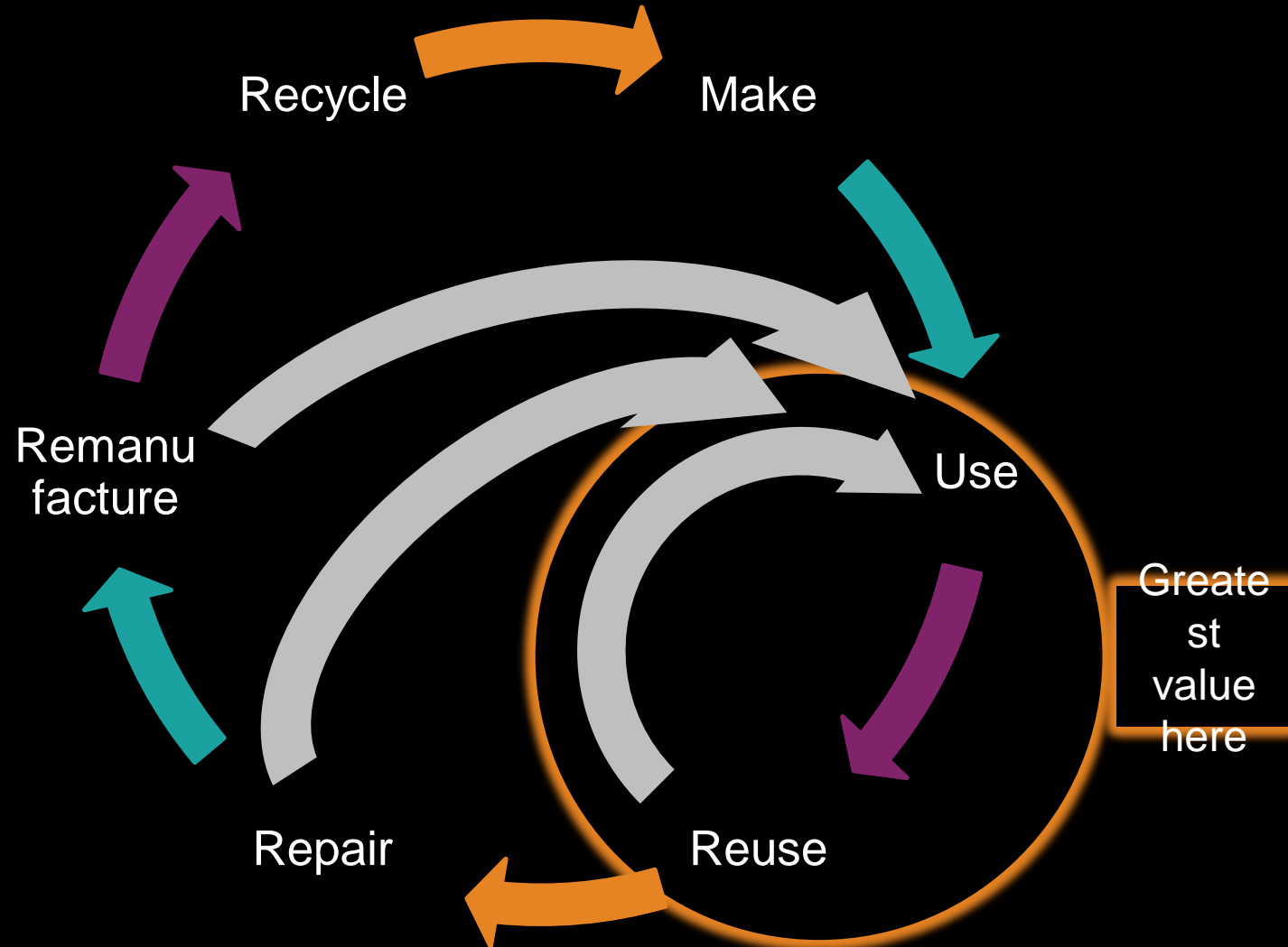
Resale displacement

FARFETCH
KEY FINDINGS

Statistics are based on a survey of 3,000 'Pre-owned buyers' (people who have purchased at least one pre-owned item in the last year) in the UK, US and China (1,000 per market).

38% of people said over half their wardrobe is made up of pre-owned items
US 51%, UK 42%, China 21%

On average they purchased eight pre-owned items in 2019

For **52%** of pre-owned items, buyers were actively searching for pre-owned

Where pre-owned buyers are buying

60% Instore
US 74%, UK 62%, China 42%
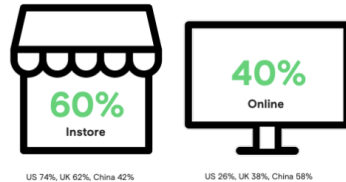
40% Online
US 26%, UK 38%, China 58%

The US and UK pre-owned buyers purchase more clothing, where in China they purchase more footwear and jewellery/watches.

49% High-street brands   **35%** Premium brands   **16%** Luxury brands

Top four reasons for buying pre-owned

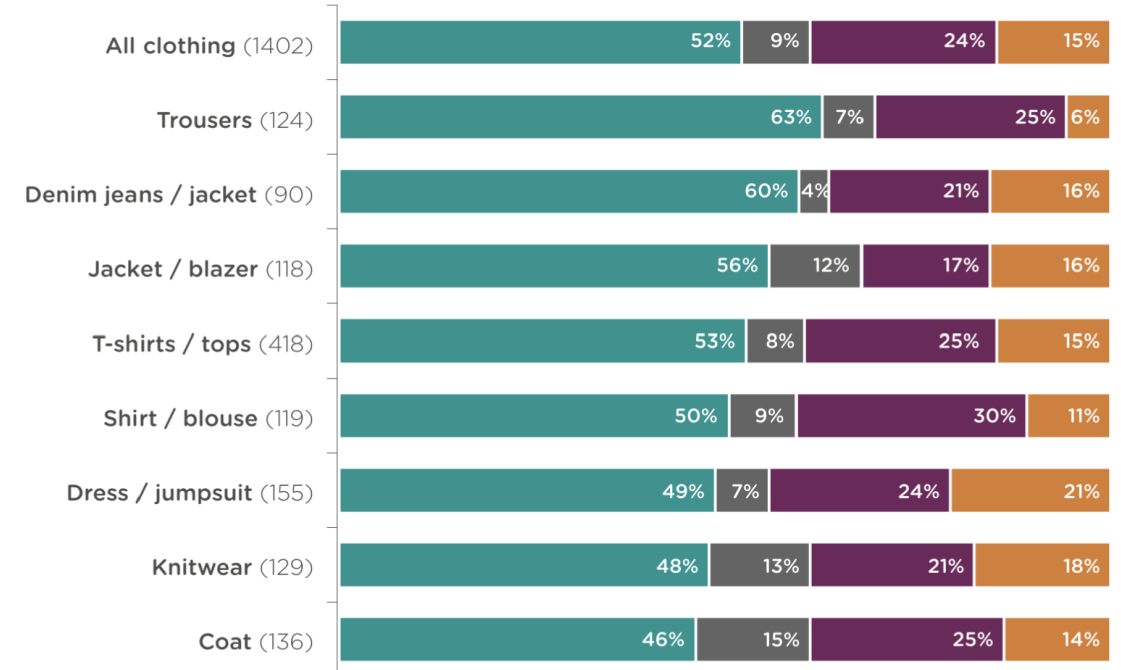**42%** Better price   **30%** Rare item   **13%** Environmental   **11%** Good past experience

※ China are more likely to purchase pre-owned items due to item rarity, where as the US and the UK are more driven by a better price

Average spend per pre-owned item

US **$59**   CN **$88**   UK **$47**

57% overall, of pre-owned fashion purchases, prevented **the purchase of something brand new.**
US and UK 65%, China 41%
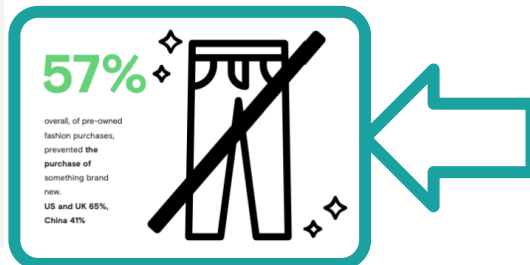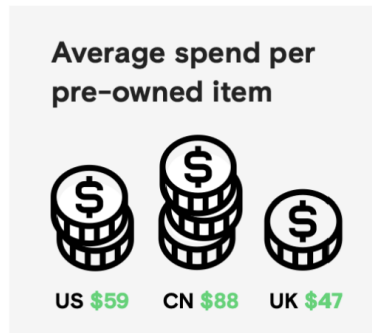
QSA's own research (2019)

Which of the following statements best applies about each of the items?

- It meant I didn't have to buy one 'new'
- It delayed a purchase of a similar item 'new'
- It gave more options to choose from / didn't prevent or delay a new purchase
- It was a unique / one-off purchase

Item	It meant I didn't have to buy one 'new'	It delayed a purchase of a similar item 'new'	It gave more options to choose from / didn't prevent or delay a new purchase	It was a unique / one-off purchase
All clothing (1402)	52%	9%	24%	15%
Trousers (124)	63%	7%	25%	6%
Denim jeans / jacket (90)	60%	4%	21%	16%
Jacket / blazer (118)	56%	12%	17%	16%
T-shirts / tops (418)	53%	8%	25%	15%
Shirt / blouse (119)	50%	9%	30%	11%
Dress / jumpsuit (155)	49%	7%	24%	21%
Knitwear (129)	48%	13%	21%	18%
Coat (136)	46%	15%	25%	14%

Around 60% displacement

Implementing circular models

It doesn't have to be a leap
of faith: take simple steps

A clear process, good
market research and careful
planning will get the right
model in place

Stage-gate approach

We use straightforward processes to identify, assess, test and implement circular business propositions

| Preparation | Innovation | Feasibility | Business case | Trial run | Scale-up & replicate | Learning & next steps |

Filtering ideas : criteria

Strategic

• Should we do it ourselves?

• Can we outsource or partner?

• What is the relative strategic risk?

Performance & impact

• Which are the highest value opportunities?
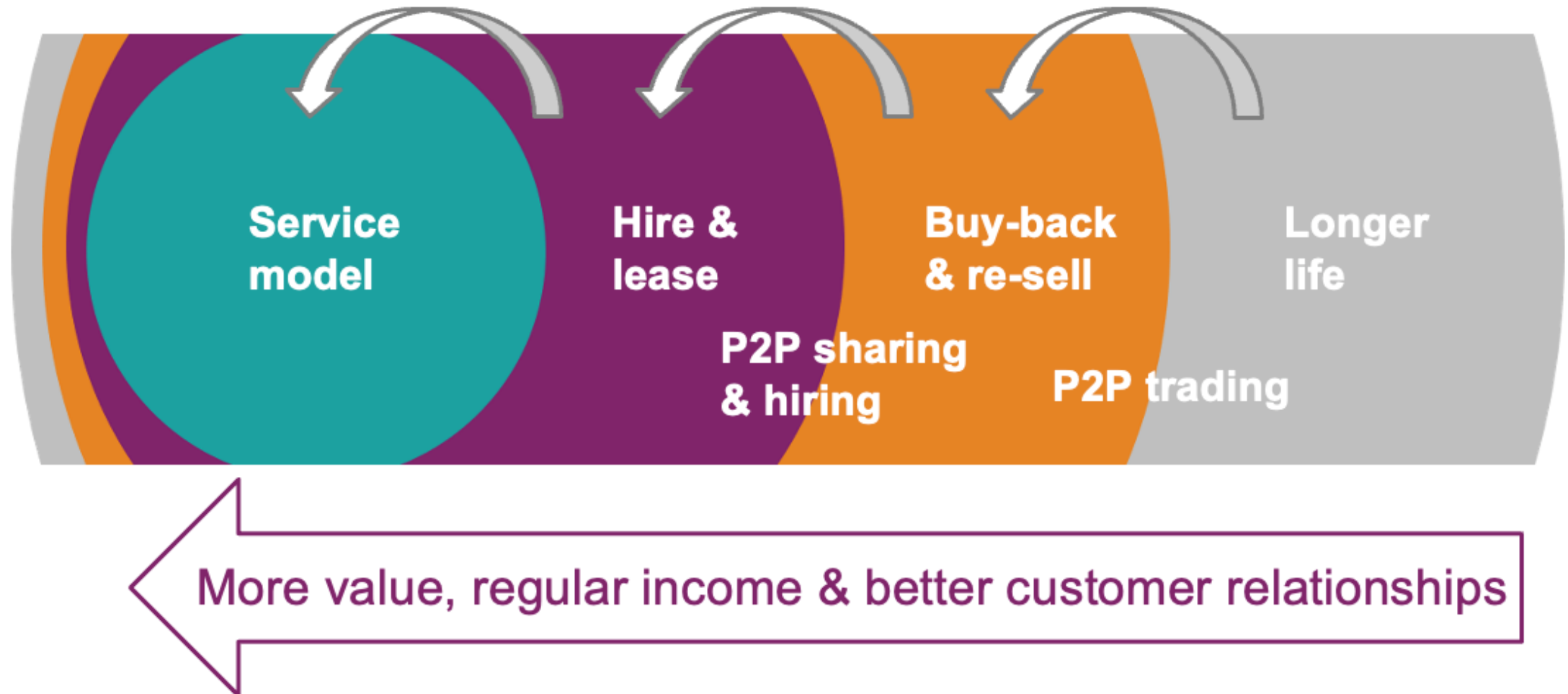
or

• Easiest to implement?

or

• Quickest to test?

Key considerations

Apply our *Seven Cs* lens at every stage to consider all the relevant stakeholders, information and develop the commercial business case

Options for business models

Service model

Hire & lease

P2P sharing & hiring

Buy-back & re-sell

P2P trading

Longer life

More value, regular income & better customer relationships

Examples of models

These are just a few examples, there are many more. Are you already behind this rapidly growing market?

Resale: seller & buyer perspectives

As a seller:

- Convenience (easier than selling it myself)
- Value for quality garments (known price? but might compromise on value vs convenience)
- Typically the "first owner"…older? Higher income?

As a buyer:

- Trustworthy & convenient source
- Authentic products (actively authenticated where high value)
- Clear pricing
- Easy to use & assess item condition/quality
- Typically n^{th} owner of the item…younger? Lower income?

Keep testing & have courage

You will only progress by testing circular models, gathering information & learning

If you don't get trial offers to market you're unlikely to get real market validation

New data from trials can underpin your successful business model scale-up

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Keep on top of the data

You're going to learn a lot...

- *Success criteria & strategic fit*
- *Customer demand*
- *Market pricing*
- *Strategic partnerships*
- *Best next circular opportunities*

Thank you

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The Problem with Fashion (and how to fix it)

Jose Baladron, TRAID Recycling Development Manager

"Clothes are never a frivolity, they always mean something"
James Laver

- The global fashion industry today is valued at around 3 trillion dollars

- Today c. 60 – 75 million people are employed in the textile industry worldwide

- To compare, in 2000, the textile industry employed around 20 million people

- Estimated that 160 billion items of clothing were delivered worldwide out of factories in 2019, a rise from 80 billion in 2012

"I just want to earn enough to feed my family, have a roof over us and live in dignity."

Cambodian Garment Worker, 2016, part of the Citizen Journalist Project with TRAID, Rainbow Collective and Labour Behind the Label.

- The fashion industry has the fourth largest environmental impact after transport, housing and food

- Total greenhouse gas emissions from textile production are 1.2 billion tones annually, more than those of all international flights and maritime shipping combined

- Globally, the fashion industry is estimated to use 79 billion M3 of water every year, set to rise by 50% by 2030

- One cotton t-shirt uses around 2,500 l of water to produce, this would take you around 6-years to drink

Today's linear clothing system has damaging effects on society and the environment

a. Sept 1977 b. Apr - Jun 1986 c. Jul - Oct 1999
d. Jul - Sep 2006 e. Jun 2009 f. Jun 2013
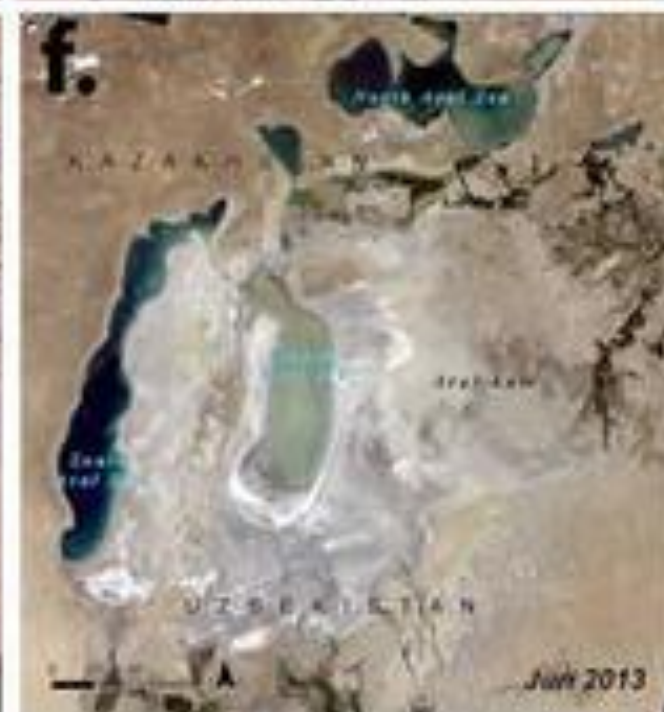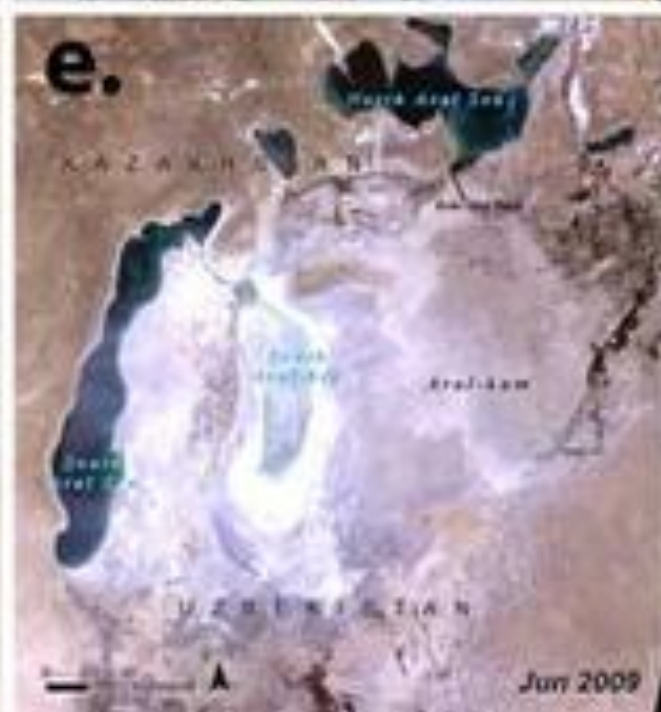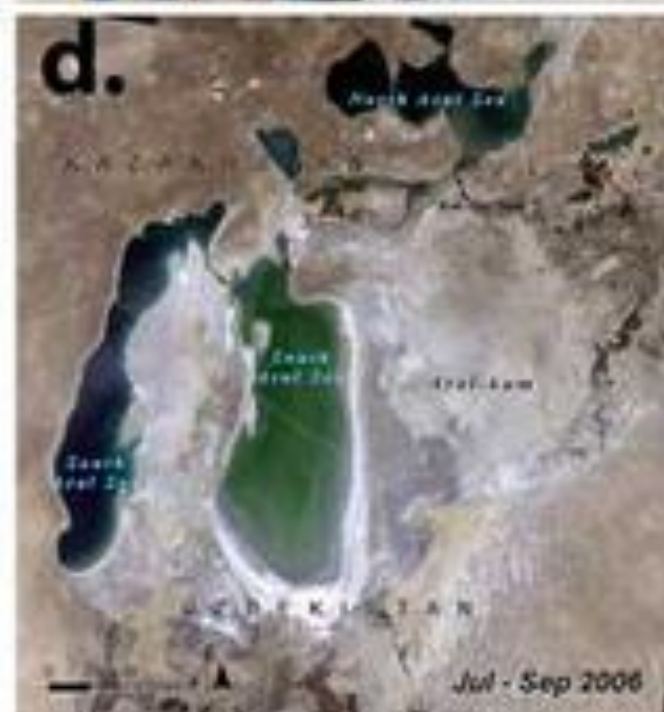
- Clothes production more than doubled between 2005 and 2019

- In the UK, between 2012 – 2019, clothes consumption increased by 220,000 tones

- Today, the number of garments produced globally has exceeded 100 Billion

- In the UK we consume approx. 3,640 billion items of clothing annually

- In 2019, UK households spent £60 billion on clothing, accounting for 5% of their overall spending

- In the UK, we send over 300,000 tones of clothes to landfill every year, much of it wearable, worth £140 M

- We wear clothes on average for 7 times before discarding them

- It is estimated that 16-24 year old's in UK throw 35 million items of clothes in the bin every year

- 23% of Londoners clothes are unworn, that's 123 million items of clothing which are not in use

DONATE CLOTHES
AND SHOES IN-STORE
OR BOOK A FREE
HOME COLLECTION
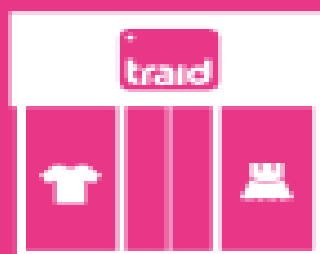020 8733 2595
TRAID.ORG.UK/COLLECTIONS
#SECONDHANDFIRST
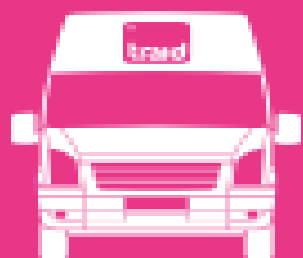
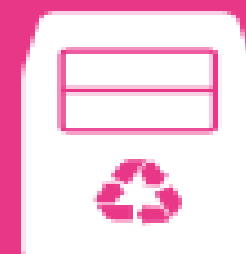Book a free fast collection from your front door
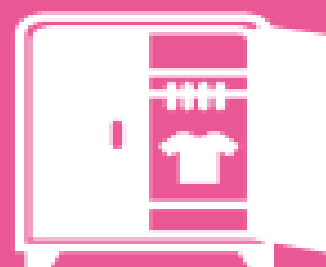
traid.org.uk/ collections

020 8733 2595

Drop clothes off at one of our 11 charity shops

traid.org.uk

Donate clothes at one of our 900+ clothes reuse banks

Be responsible for the clothes you no longer wear. Donating clothes to TRAID puts them back into circulation so they can be worn again.

We hang, tag and price around **21,000 garments** every week

- Extending products' lifetimes are the first preference when it comes to actions to improve clothing's sustainability

- Extending the life of a garment by just 9 months reduces the carbon, water, and waste footprints by 20-30% each

- For every tone of clothing which is directly reused (I.e. in a TRAID charity shop), it saves 8.8 tons of carbon

- The cost of landfilling clothes in the UK is around £85 million per year. What a waste!

London's Fashion Problem

traid.org.uk/23percent

23% traid

#23percent

23 Percent

of London's clothes are unworn

this is the equivalent of

123 Million

items of clothing

It would take the entire population of London 15 years to drink this water

15 Years

London's unworn clothes weigh

35,093 Tonnes

2,561 times as much as Big Ben

unworn clothes in London are equivalent to 56,000,000m³ of water

56 Million

50,000 Homes' electricity for one year

is equivalent to the carbon footprint of these clothes

2,700 Litres of water

are used to make a T-shirt, which would take six years to drink

Giving longer life to our clothes helps to advance the United Nations Sustainable Development Goal Number 12 to ensure sustainable production and consumption.

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23%

#23percent

traid

BUY BETTER, BUY LESS, MAKE IT LAST

Thank you!

Jose Baladron

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Q&A

projectblueprint.eu/roadshow