



# Consumer views on circular textiles

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# Introduction



- As a part of the Telavalue –project, consumer views were studied to gain an understanding on **consumers’ perspective towards the future of circular textiles; attitudes towards recycled fibres** in garments and **recycling of end-of-life textiles**
- The study focused on four European countries (Finland, Sweden, Germany and the Netherlands), chosen based on the interest of Telavalue consortium partners
- In addition, the views of Finnish respondents on the **national separate collection of end-of-life textiles** were examined, as the collection begun during the Telavalue project
- The data was gathered in July 2023, and the respondents were recruited by Bilendi Oy. The data was analyzed and visualized with excel
- This report summarizes the results of the research

# Content of the report



**Views on future garments made according to circular economy and EU's textile strategy**



**Attitudes towards recycled fibres in garments and recycling of textiles**



**Separate collection of end-of-life-textiles – consumer views in Finland**



# Respondent profile

## Country coverage:

- Finland (n=300), Sweden (n=300), Germany (n=300), The Netherlands (n=300)

## Age distribution:

- 18–75 years

## Gender:

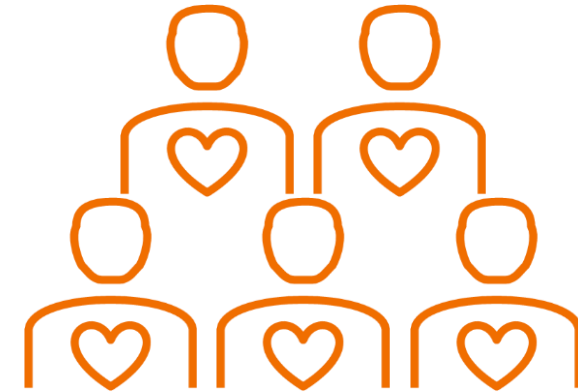
- Female 49,7%, Male 50,1%, Other 0,3%

## Form of living:

- Alone 31,2%
- With spouse 31,0%
- With spouse and child / children 25,3%
- At home with parents 6,3%
- Alone with child / children 4,4%
- Other: 1,9%

## Employment situation:

- Working fulltime 48,1%
- Pensioner 20,6%
- Working part-time 10,6%
- Unemployed 6,7%
- A student: 6,6%
- Other:7,5%



**N = 1200**

- Survey answering period: July 2023
- Recruitment of participants via Bilendi Oy (representative sample of age, gender and area of living in each country)



**Views on future garments made according to circular economy and EU's textile strategy**

## Scenario of a future garment

A garment found in a store (e.g. a college shirt) is made of recycled textile fibres (recycled fibre from end-of-life textiles) and bio-based fibres (cellulose-based biodegradable fibre) and no dangerous chemicals have been used in its production.

The recycled textile fibre comes from a textile recycling facility located in Europe and the bio-based fibre is supplied by a European operator. The production of the garment (yarn spinning, fabric production, garment sewing and assembly) is also done in Europe. Due to the production method and material, the garment costs more than a similar garment offered by a fast fashion brand.

The garment has a digital identifier attached to it (e.g. QR code), which you can scan to get additional information about the origin of the garment, e.g. the material and manufacturing process, manufacturing countries and manufacturers.

With the help of the digital tag, you also get more detailed washing instructions, instructions for maintenance and repair of the garment, suggestions for reuse (charities, 2nd hand retailers) and recycling instructions when the garment is at the end of its life.

At the end of its life, the garment can be recycled back to fibres, again to be utilized for other textile products.



The respondents were presented with a possible future scenario of a garment that is manufactured in accordance with **circular economy** and the **EU's textile strategy**

# Elements in the scenario



Part of the material of the garment comes from **textile fibre recycled in Europe**



The garment **contains bio-based fibres**



The garment is **manufactured in Europe**



The **environmental impact of garment manufacturing has been openly communicated** with the help of a digital identifier



The **chemicals used in the manufacture of the garment have been reported** with the help of a digital identifier



The garment has **sustainability certifications** (e.g. EU Ecolabel, Global Recycled Standard)



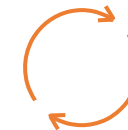
At the end of its life, the garment can **easily be recycled back into a new fibre**



The garment's **production chain has been transparently explained** with the help of a digital identifier



The **ways and possibilities of repairing the garment have been explained** with the help of a digital identifier



The means of **reusing the garment and the recycling possibilities have been explained** with the help of a digital identifier



**How would the identified elements in the scenario affect the purchasing decision of European consumers?**

Would not affect at all

Would have little effect

Cannot say

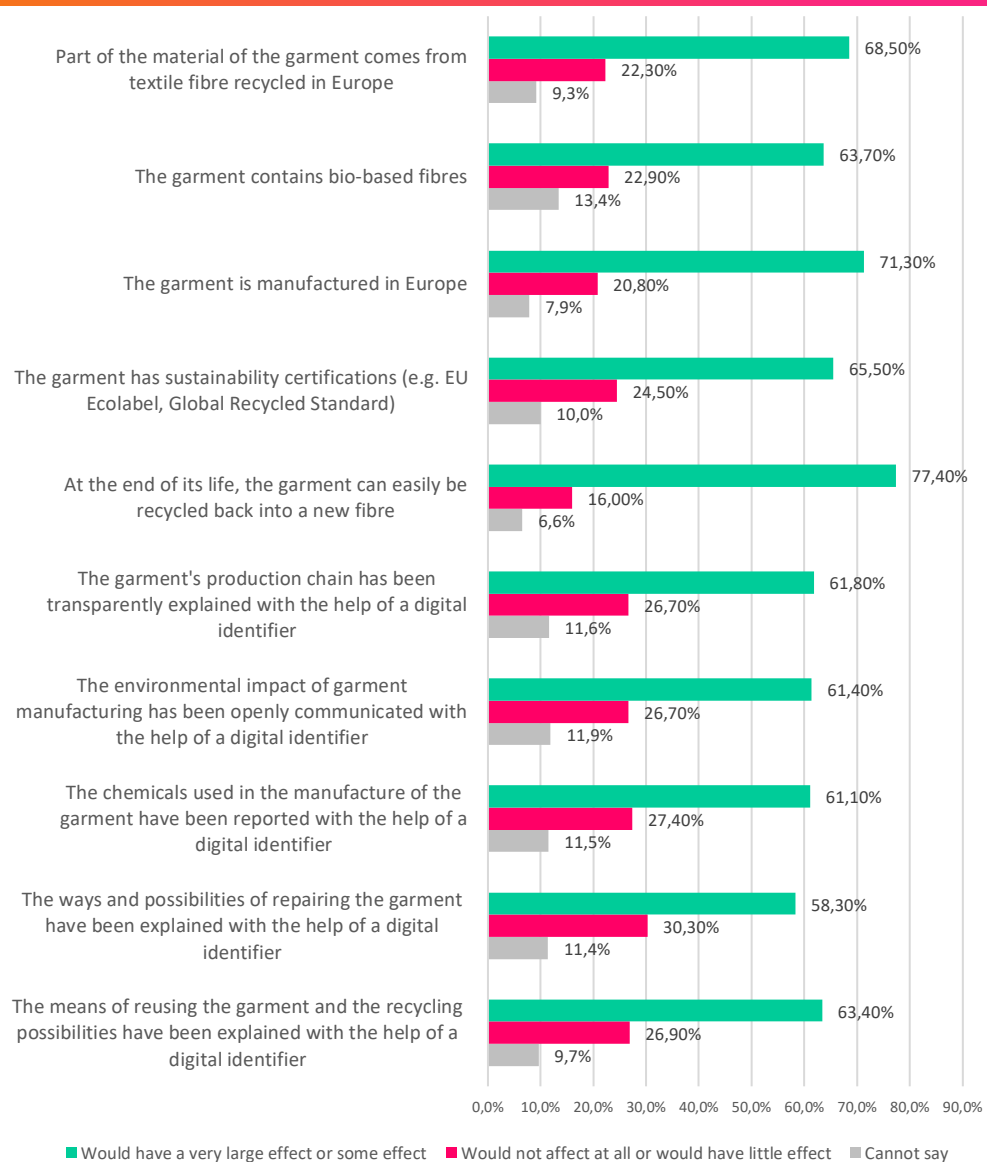
Would have some effect

Would have very large effect





# Effects of elements on purchasing decision



N=1200 (300/country)

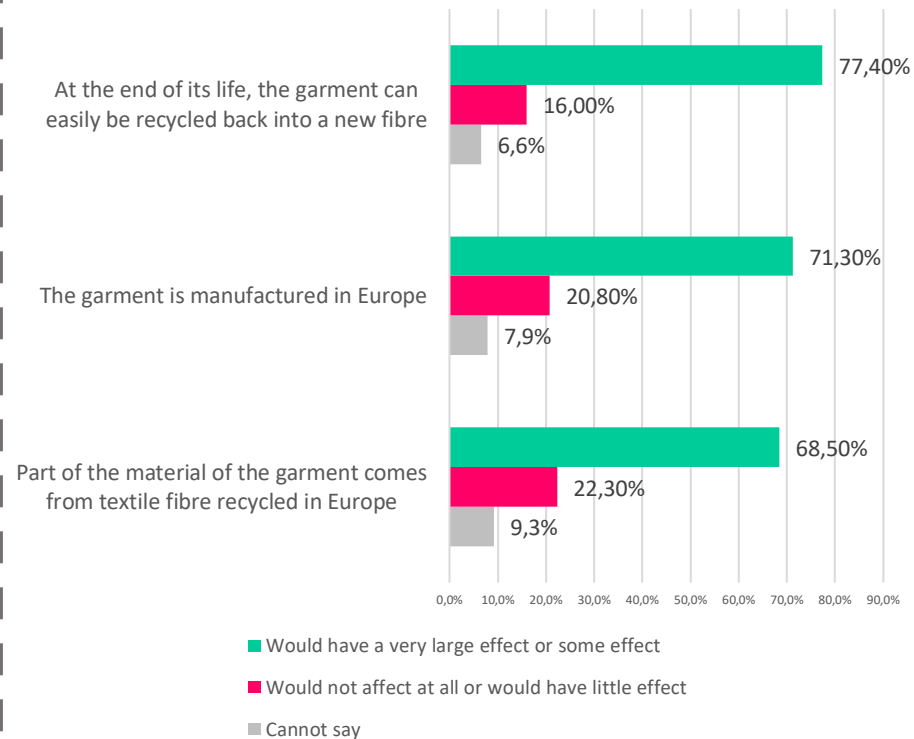
- Generally, all described elements in the scenario were regarded very positive
- most of the respondents reported them to *have some effect or very large effect* on the purchasing decision of such a product
- No significant differences between countries were found (Finland, Sweden, Germany, The Netherlands)



# Most effective factors

- The recyclability of the garment (at the end of its life) back into new fibre was seen as most effective factor
- In addition, the fact that it is manufactured more “locally” in Europe, was also seen important, also from the point of view that part of the material comes from textile fibre recycled in Europe

How much would the following things affect your purchase decision when buying this kind of garment



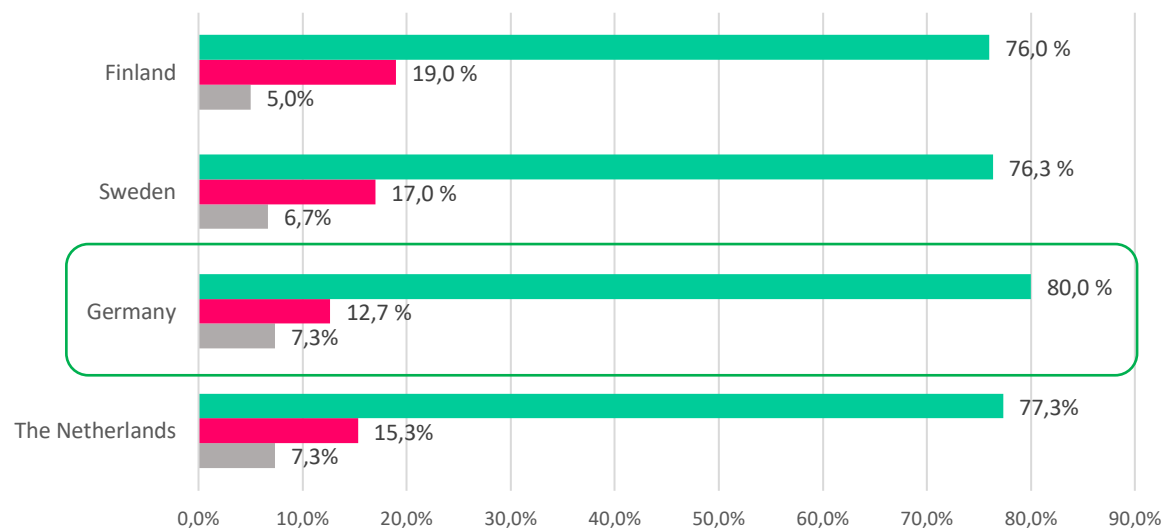
N=1200 (300/country)



# At the end of its life, the garment can easily be recycled back into a new fibre



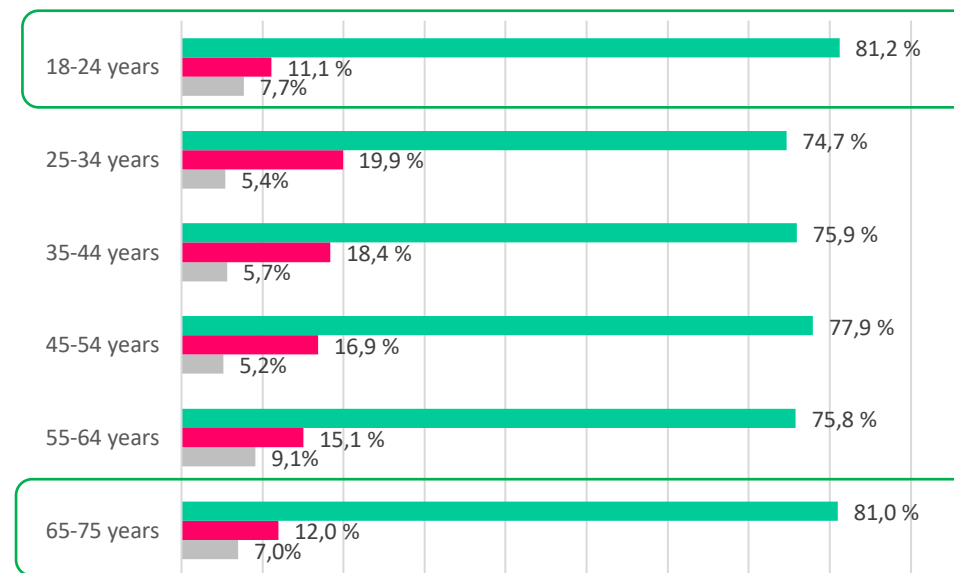
At the end of its life, the garment can easily be recycled back into a new fibre



- Would have a very large effect or would have some effect
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N=1200 (300/country)

At the end of its life, the garment can easily be recycled back into a new fibre



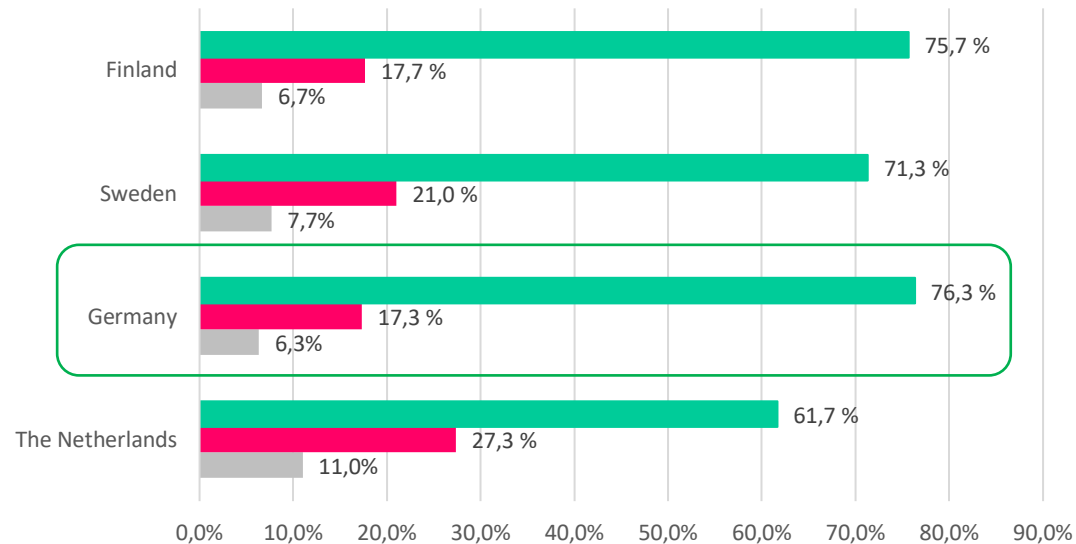
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18-24 years: N = 117  
 25-34 years: N = 221  
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# The garment is manufactured in Europe

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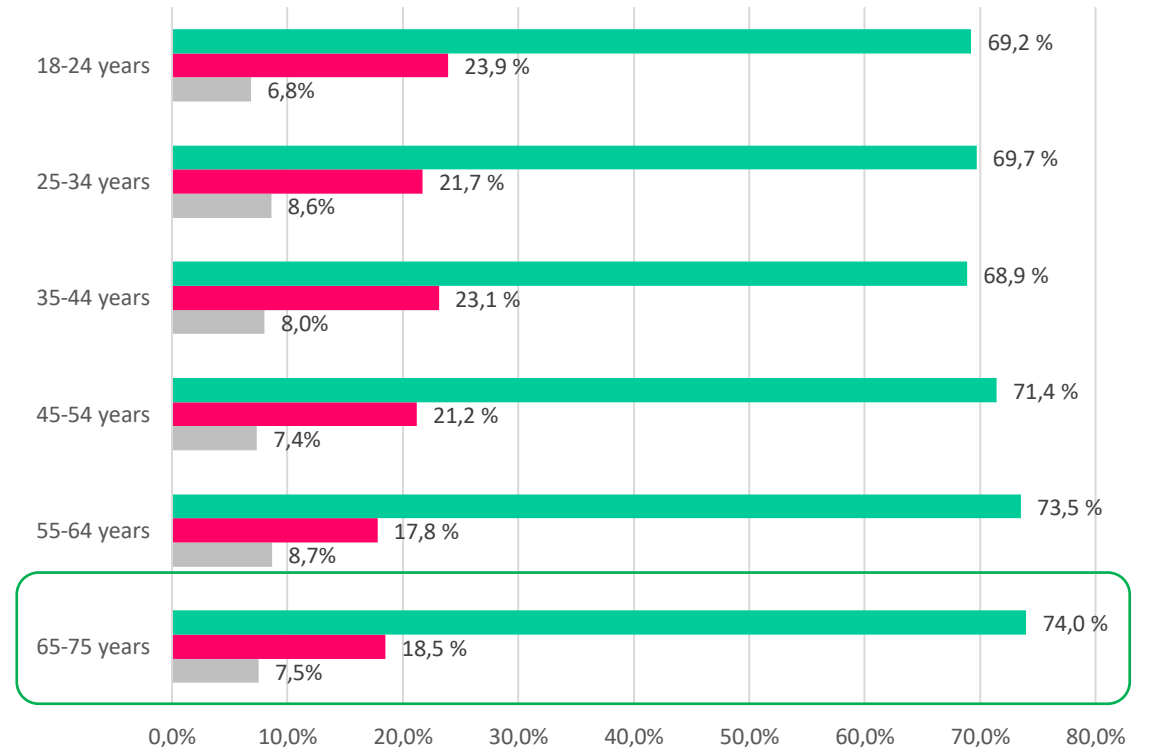


N=300/country

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N=1200 (300/country)

### The garment is manufactured in Europe



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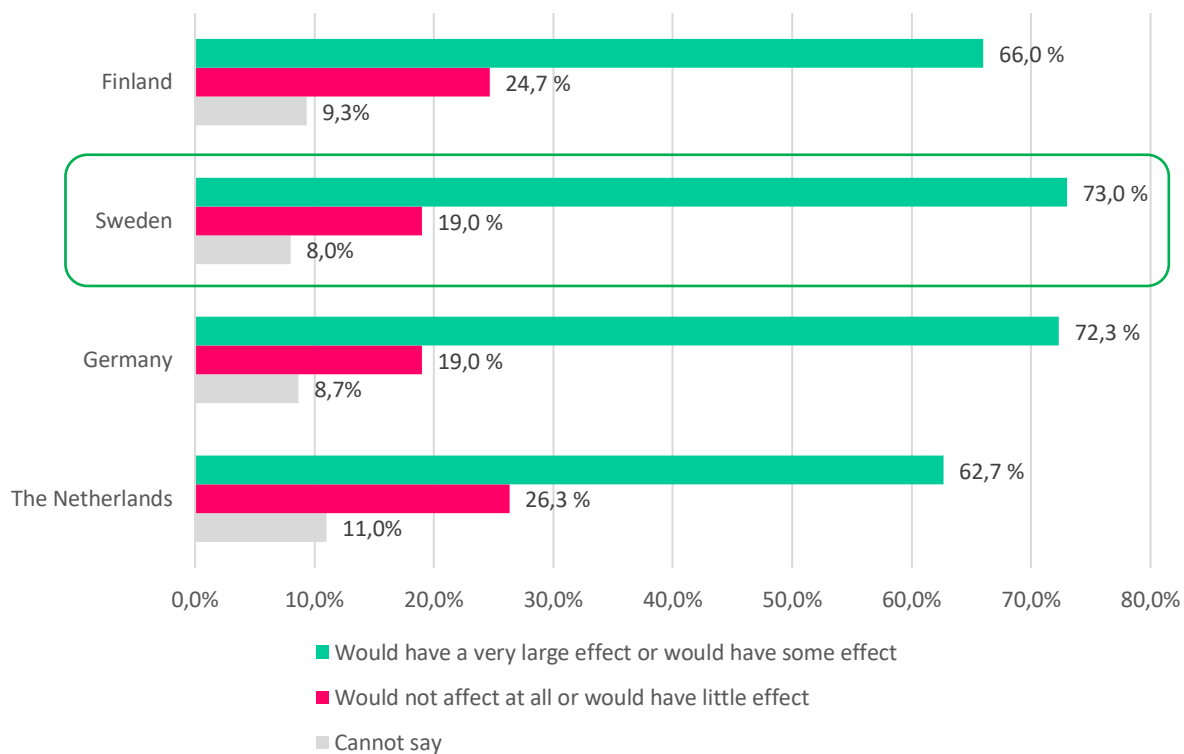
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# Part of the material of the garment comes from textile fibre recycled in Europe

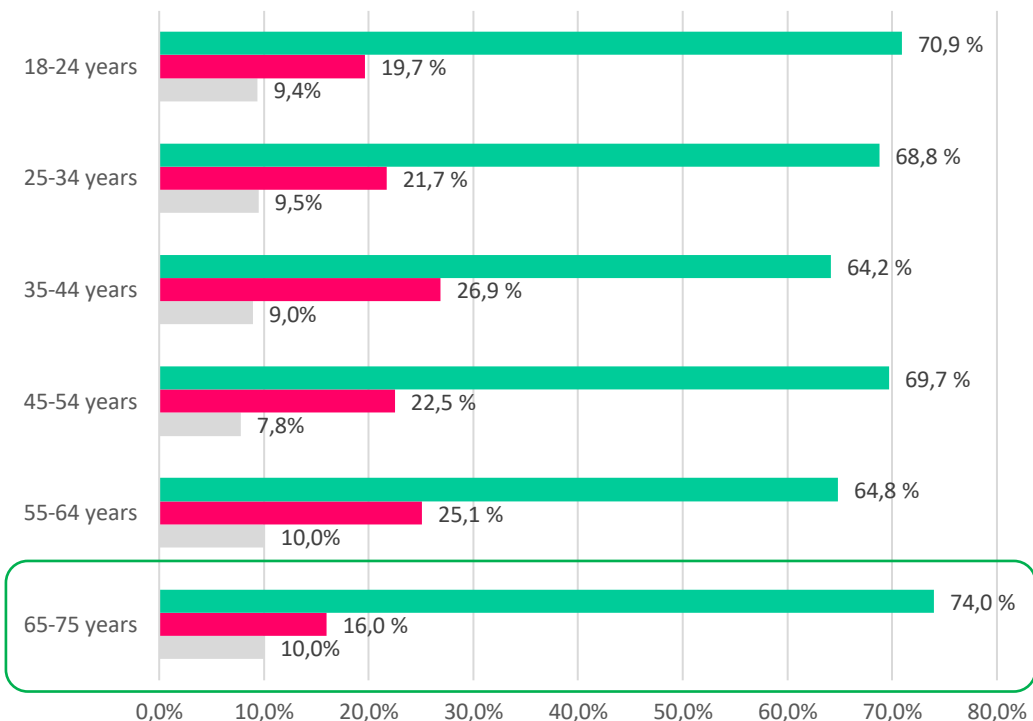


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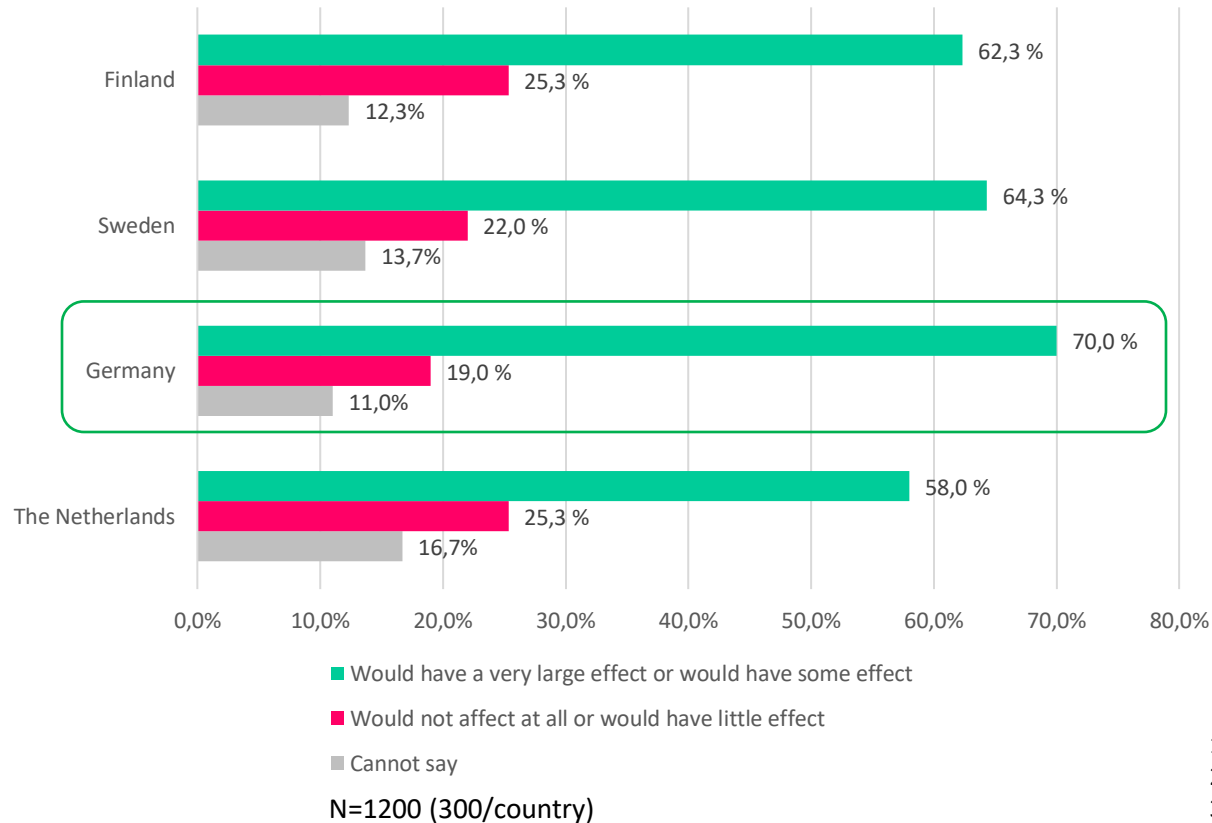
65-75 years: N = 200



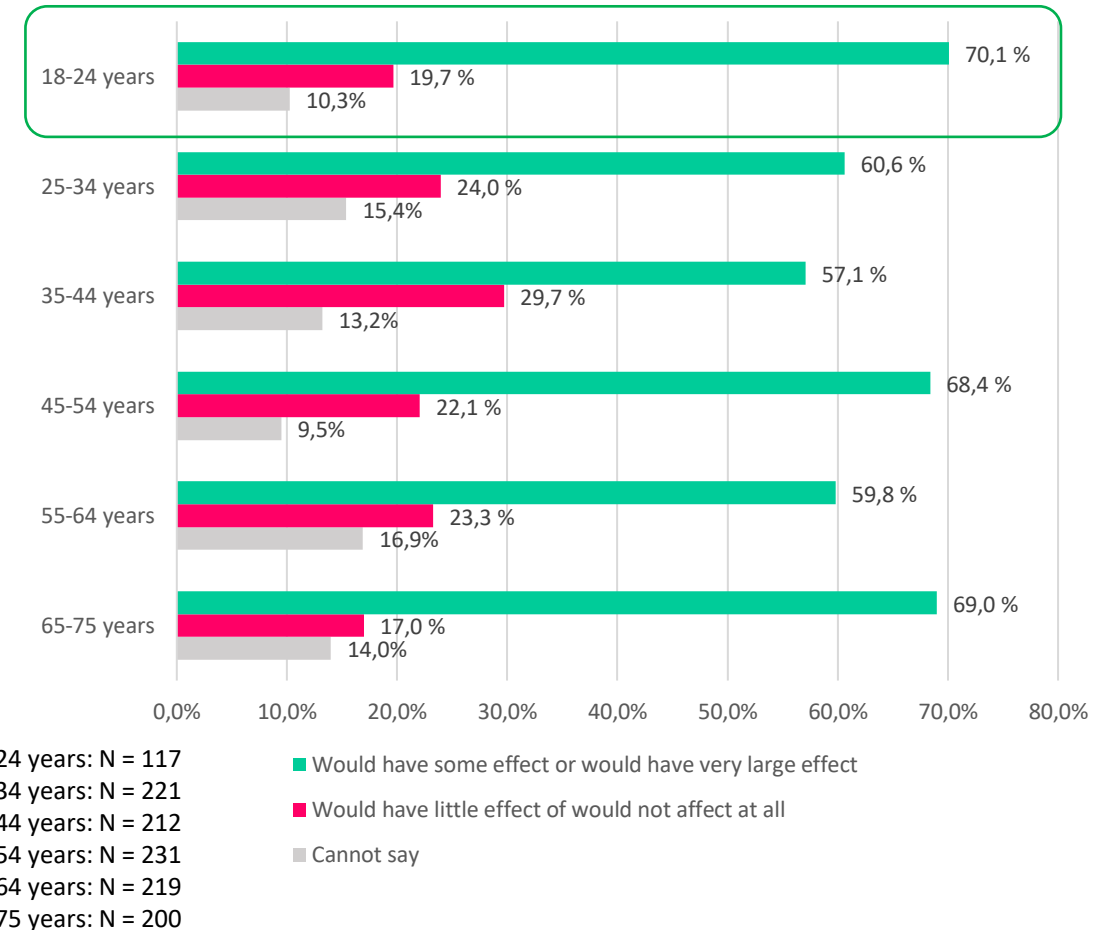
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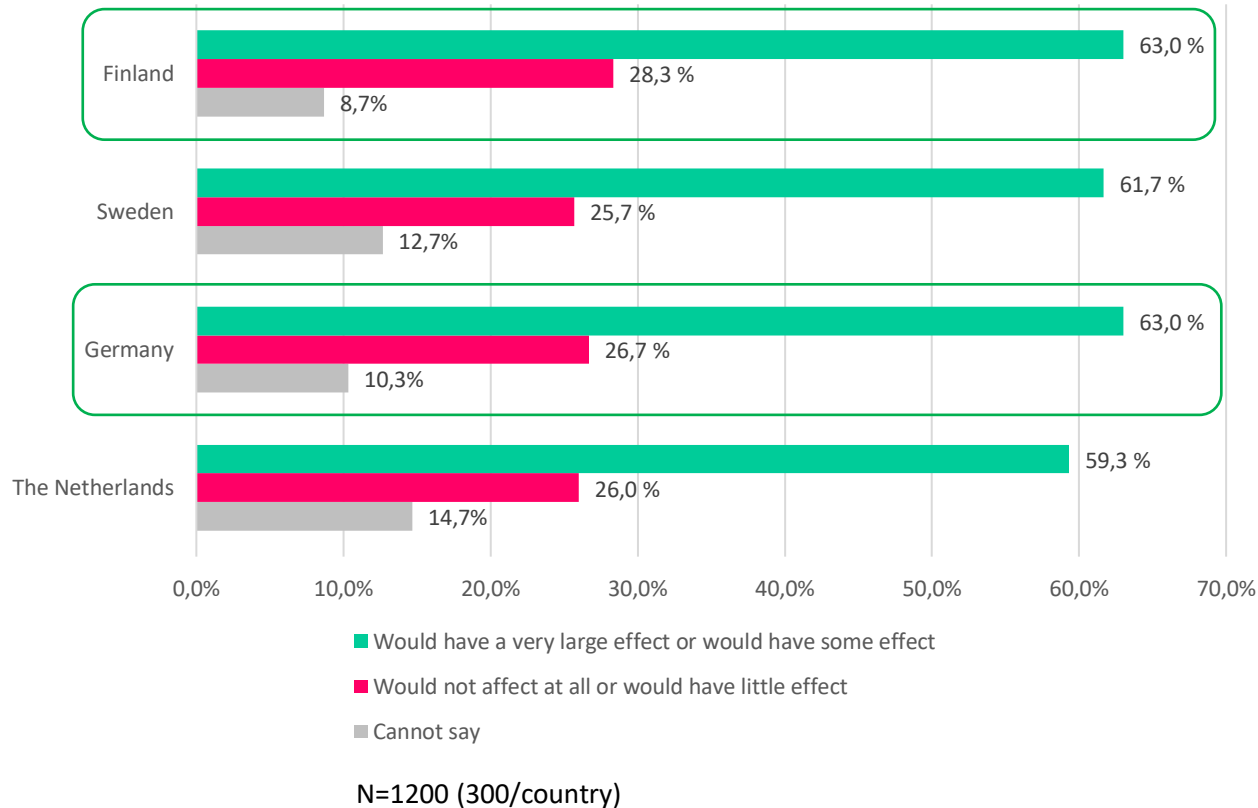




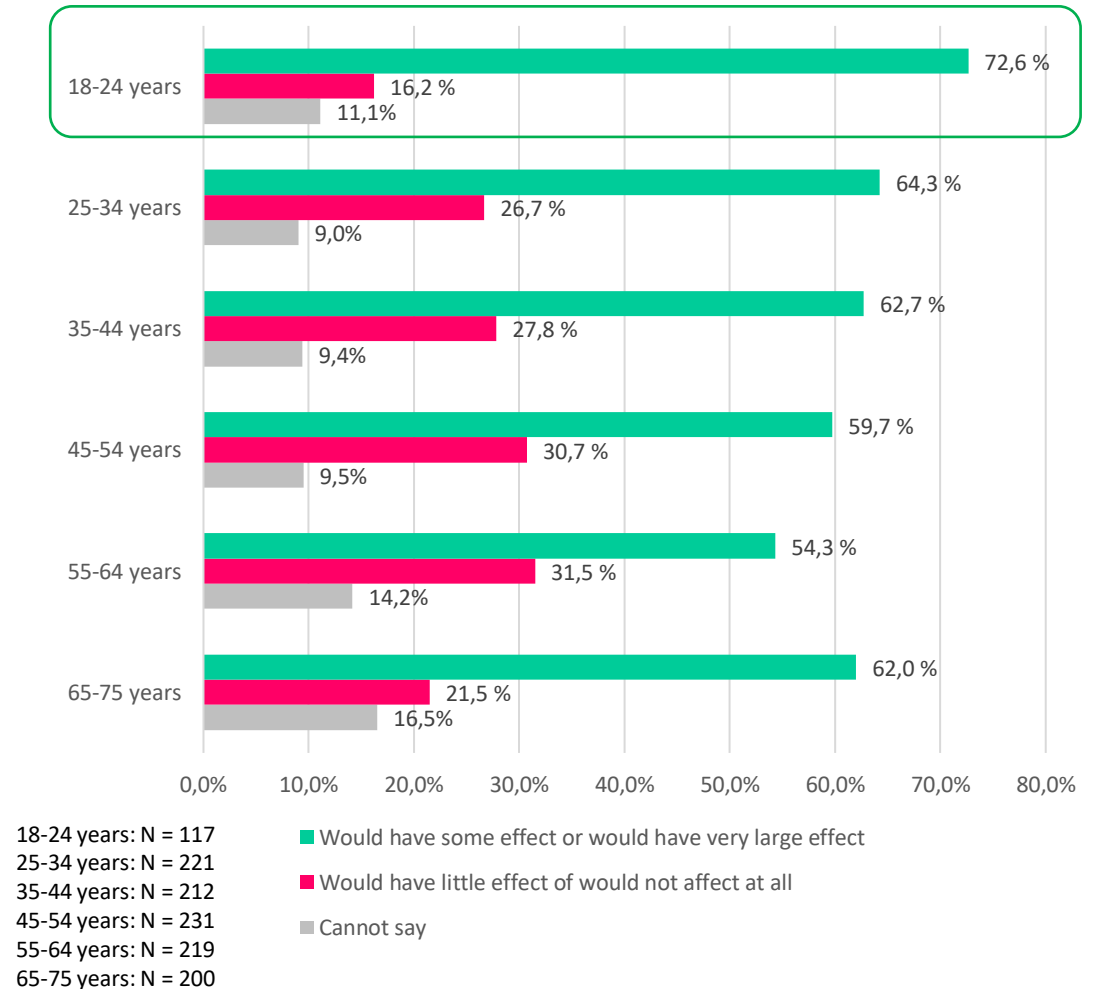
# The garment's production chain has been transparently explained with the help of a digital identifier



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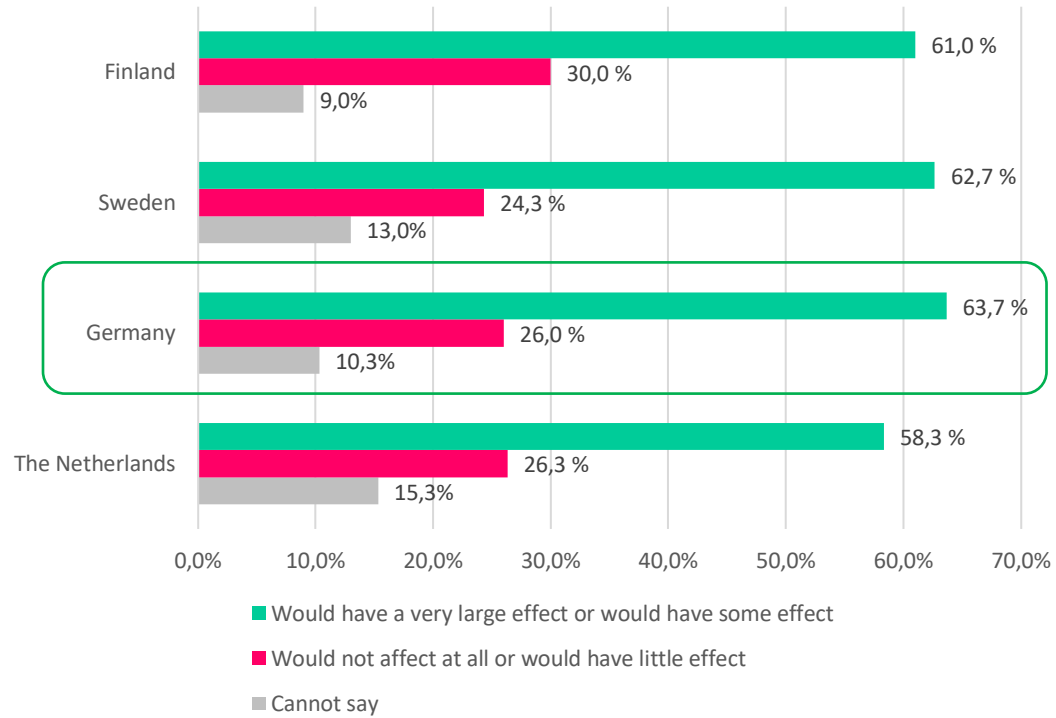




# The environmental impact of garment manufacturing has been openly communicated with the help of a digital identifier



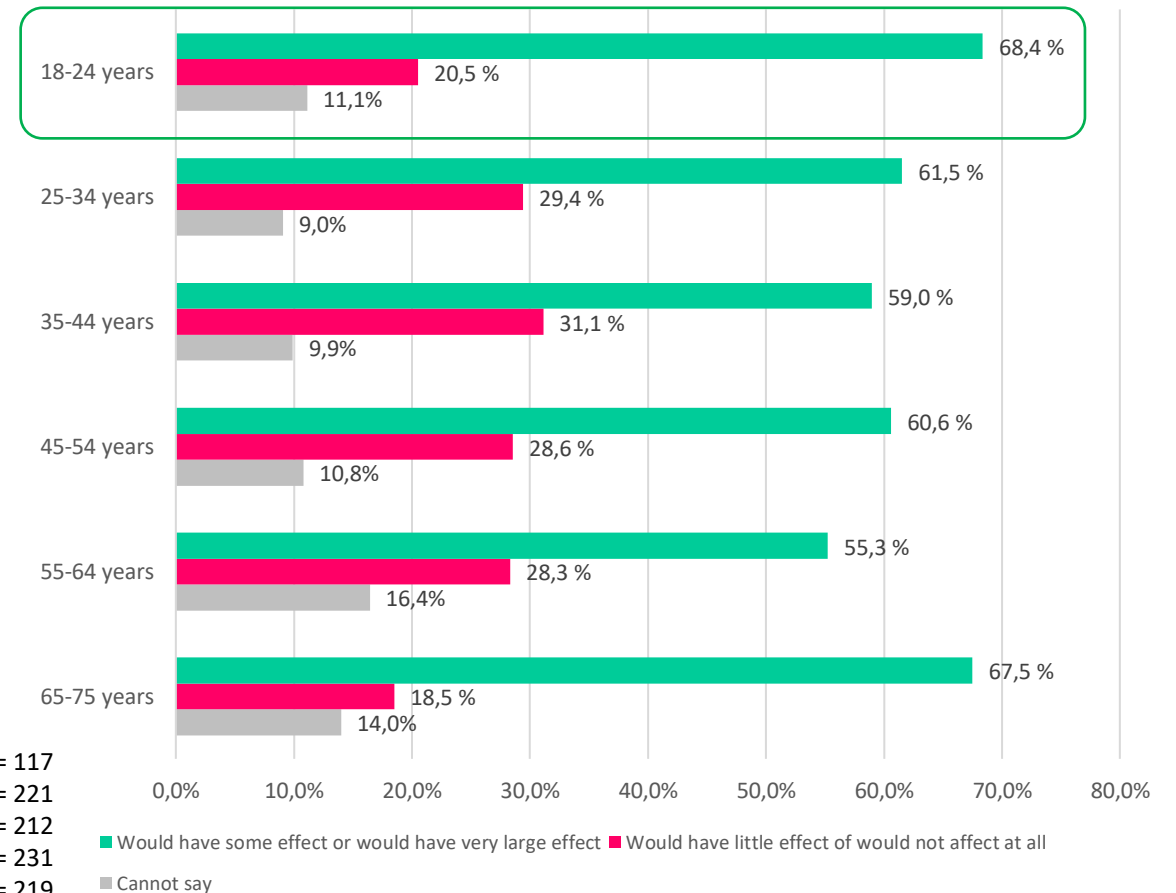
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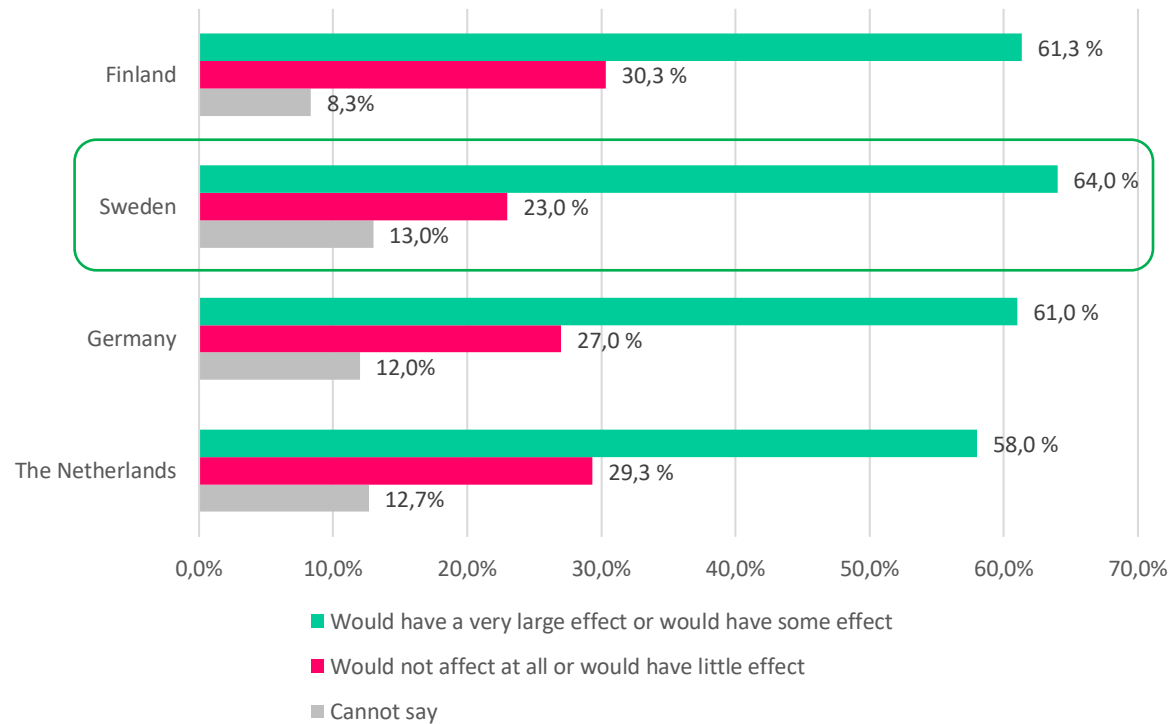




# The chemicals used in the manufacture of the garment have been reported with the help of a digital identifier

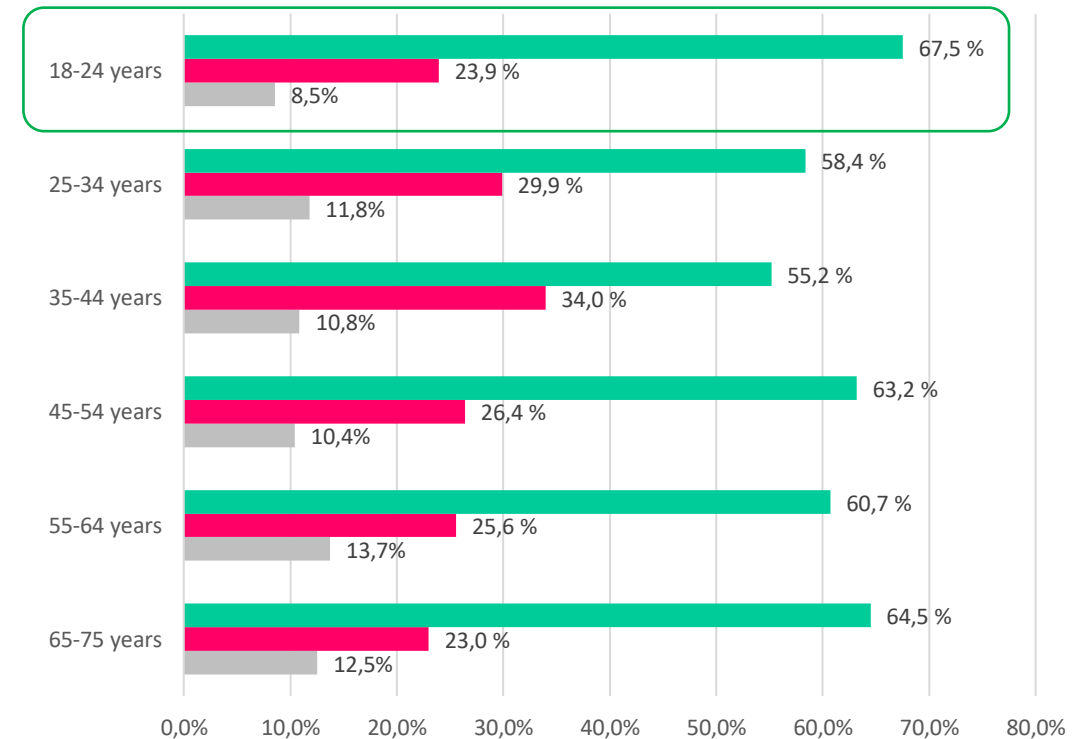


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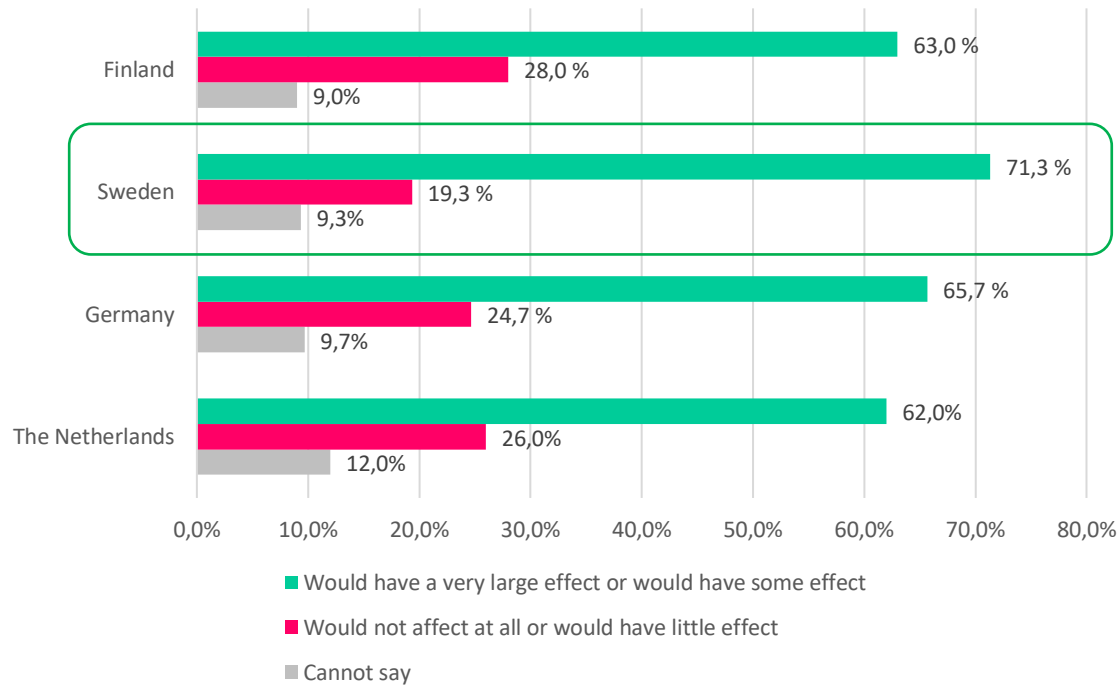
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# The garment has sustainability certifications (e.g. EU Ecolabel, Global Recycled Standard)

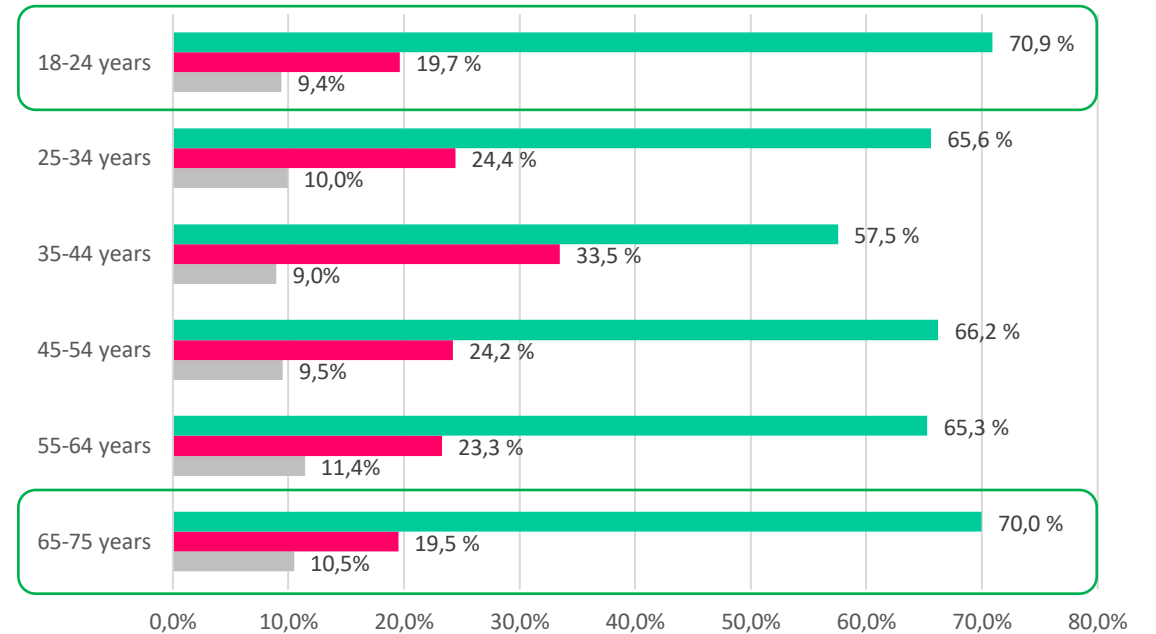


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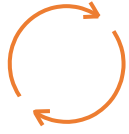
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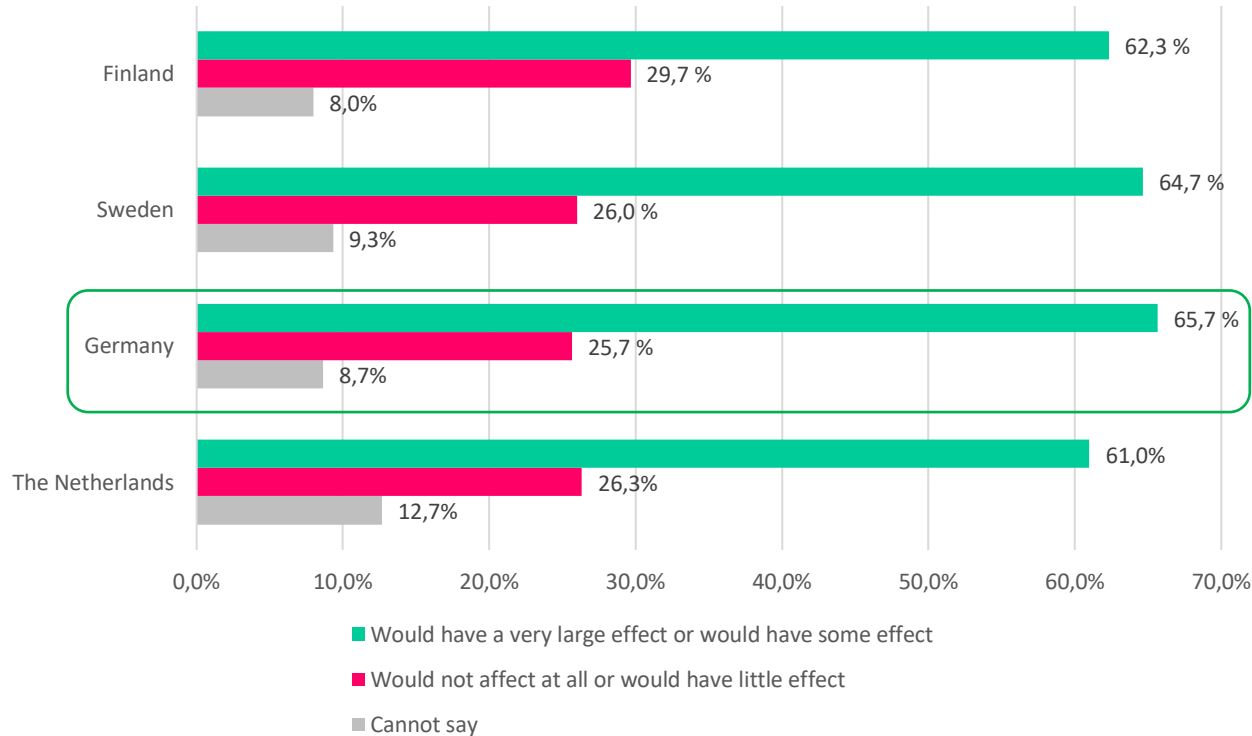
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# The means of reusing the garment and the recycling possibilities have been explained with the help of a digital identifier

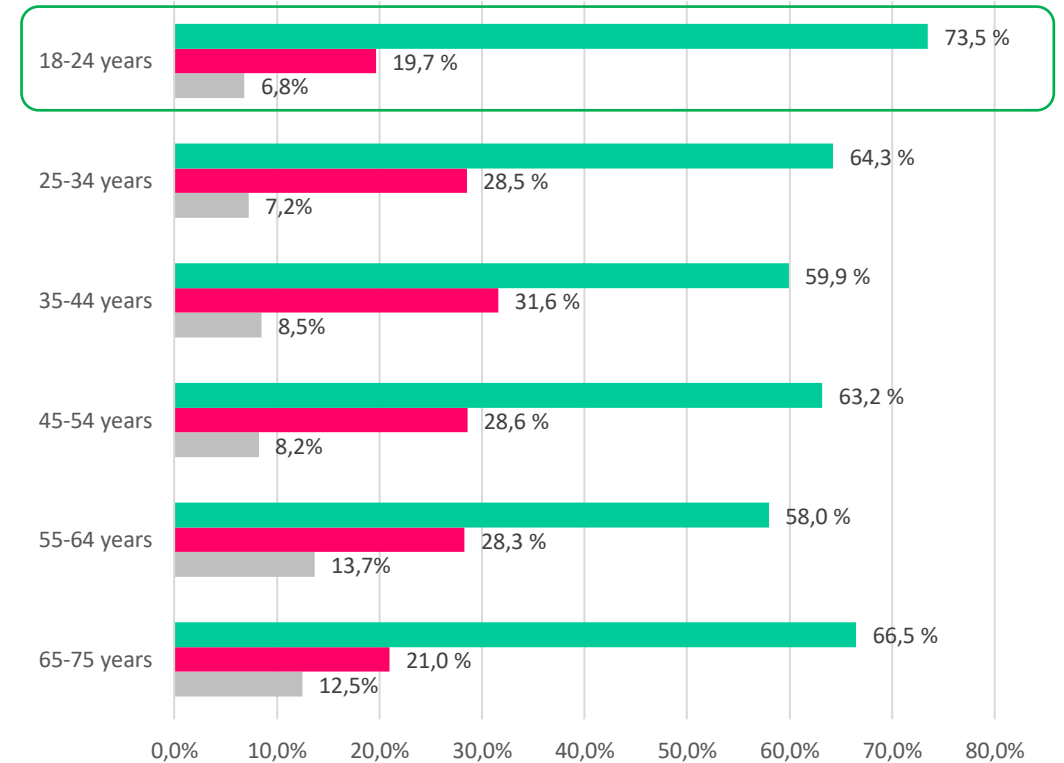


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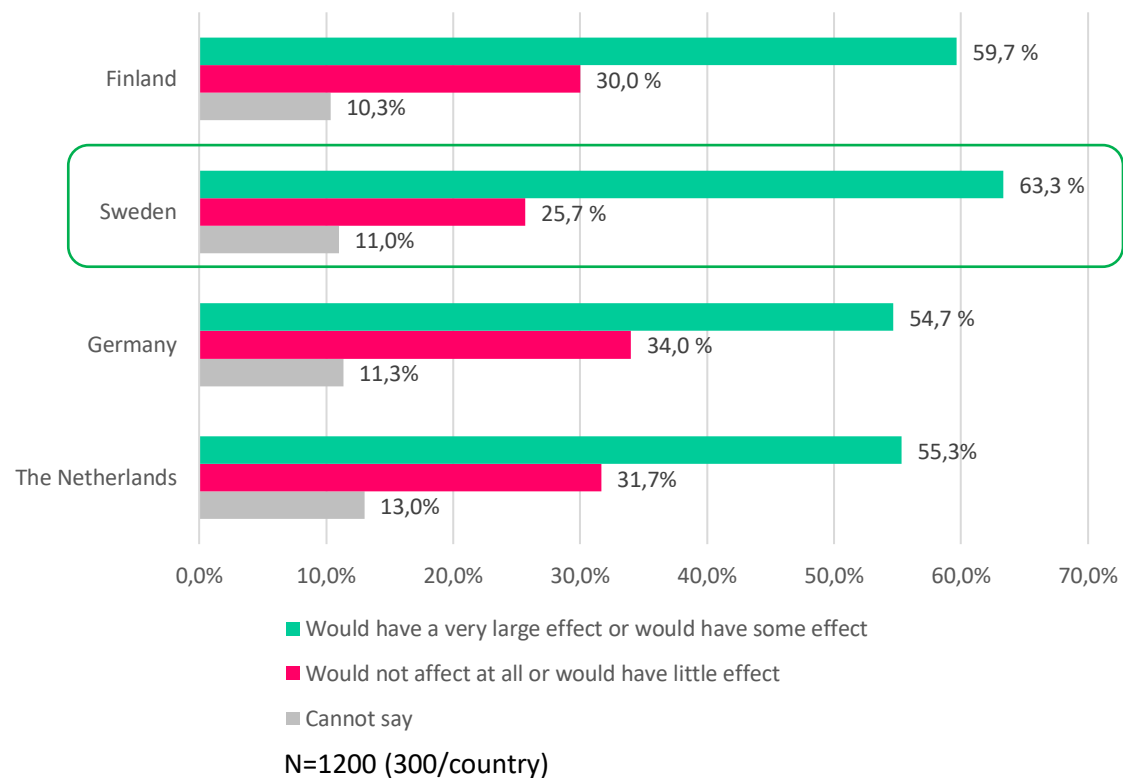
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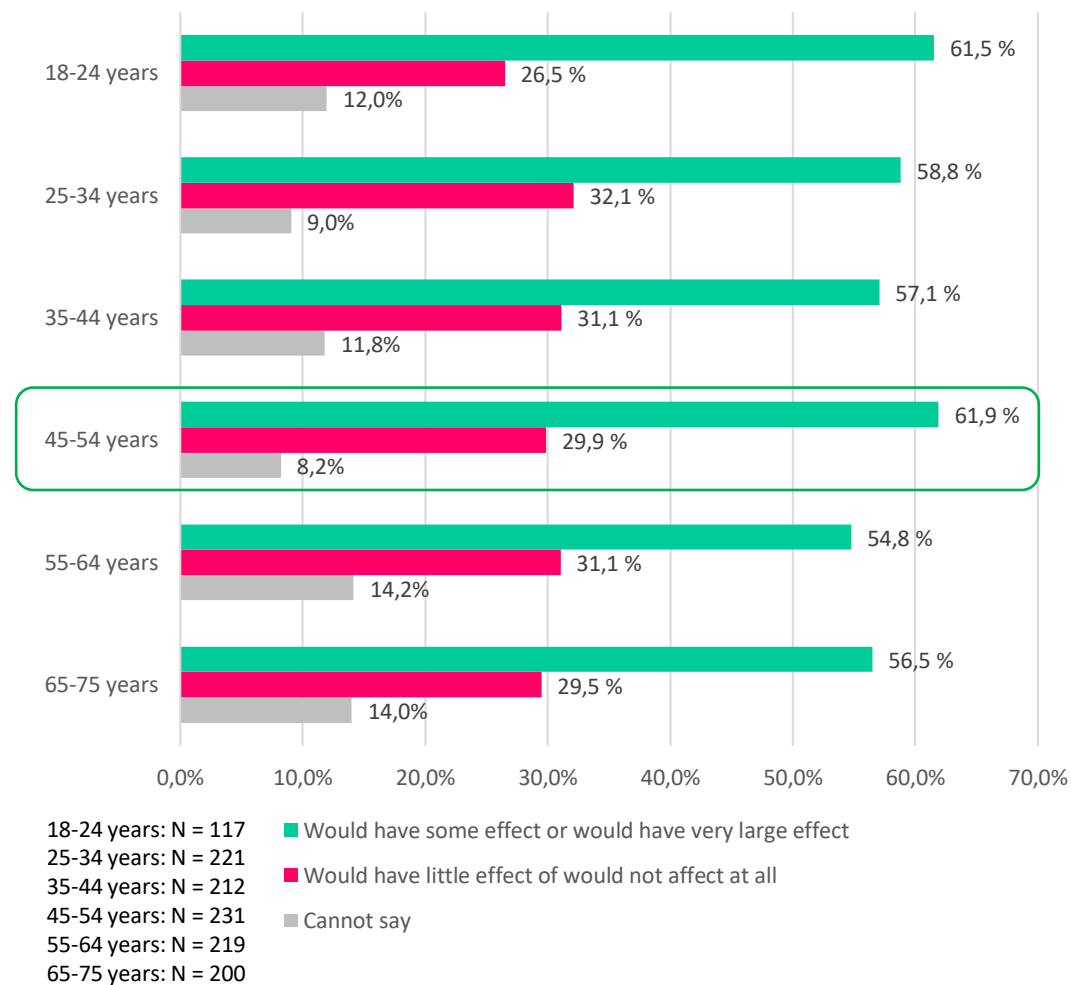
# The ways and possibilities of repairing the garment have been explained with the help of a digital identifier



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## Barriers to purchasing such garments

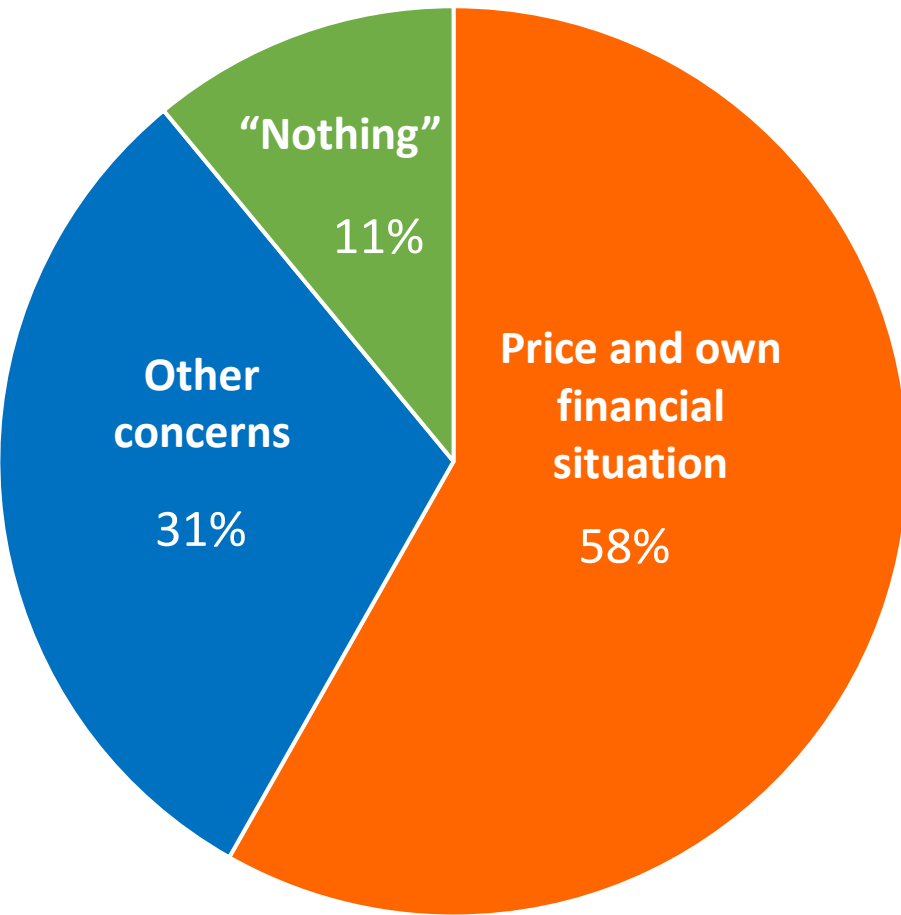
- The consumers were asked with an open-ended question:

*what factors would prevent you from purchasing garments as described in the scenario?*

- 646 clear responses were identified from the responses

→ These responses were clustered together in thematic groups and quantified in an excel file

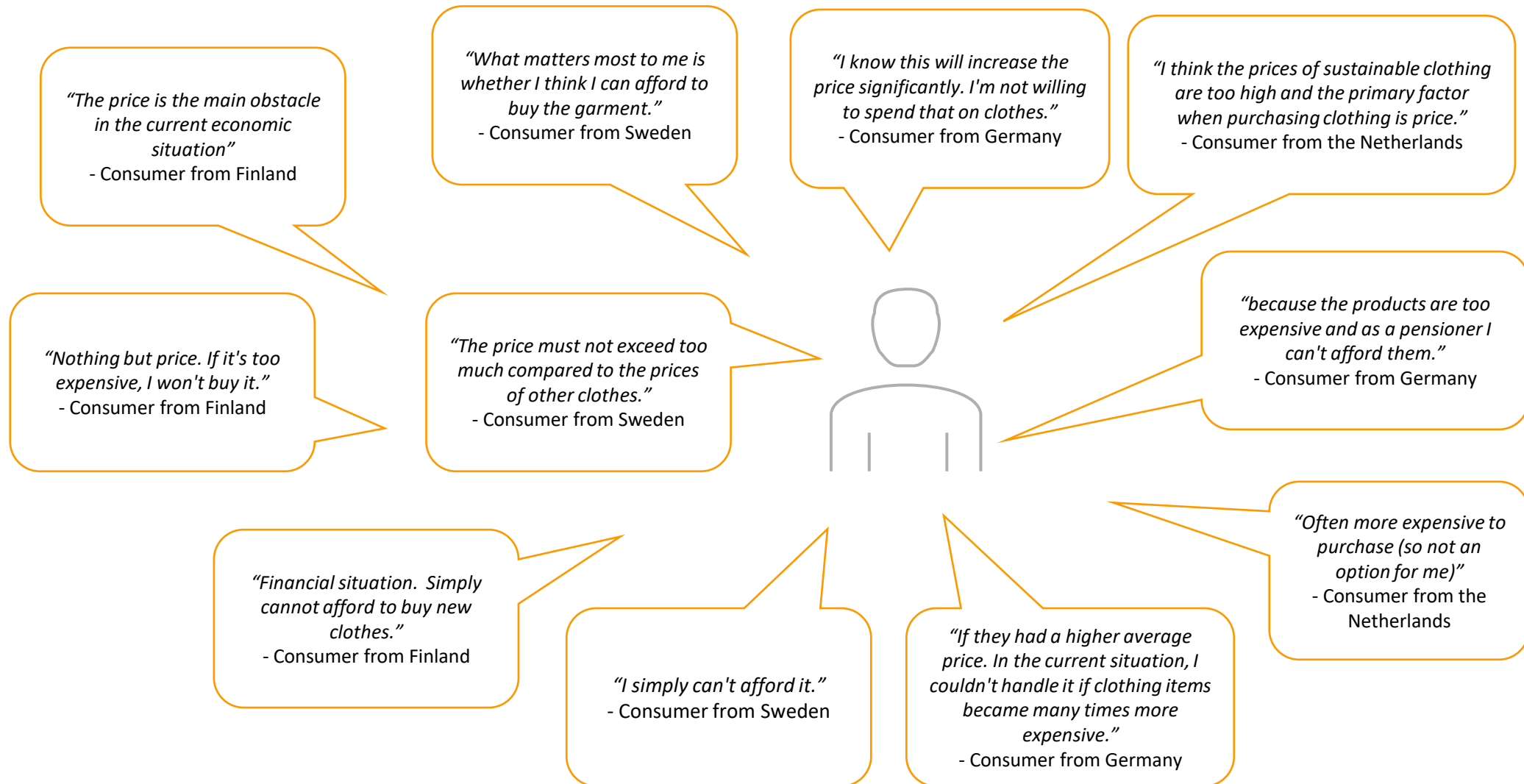




***What factors would prevent you from purchasing garments as described in the scenario?***



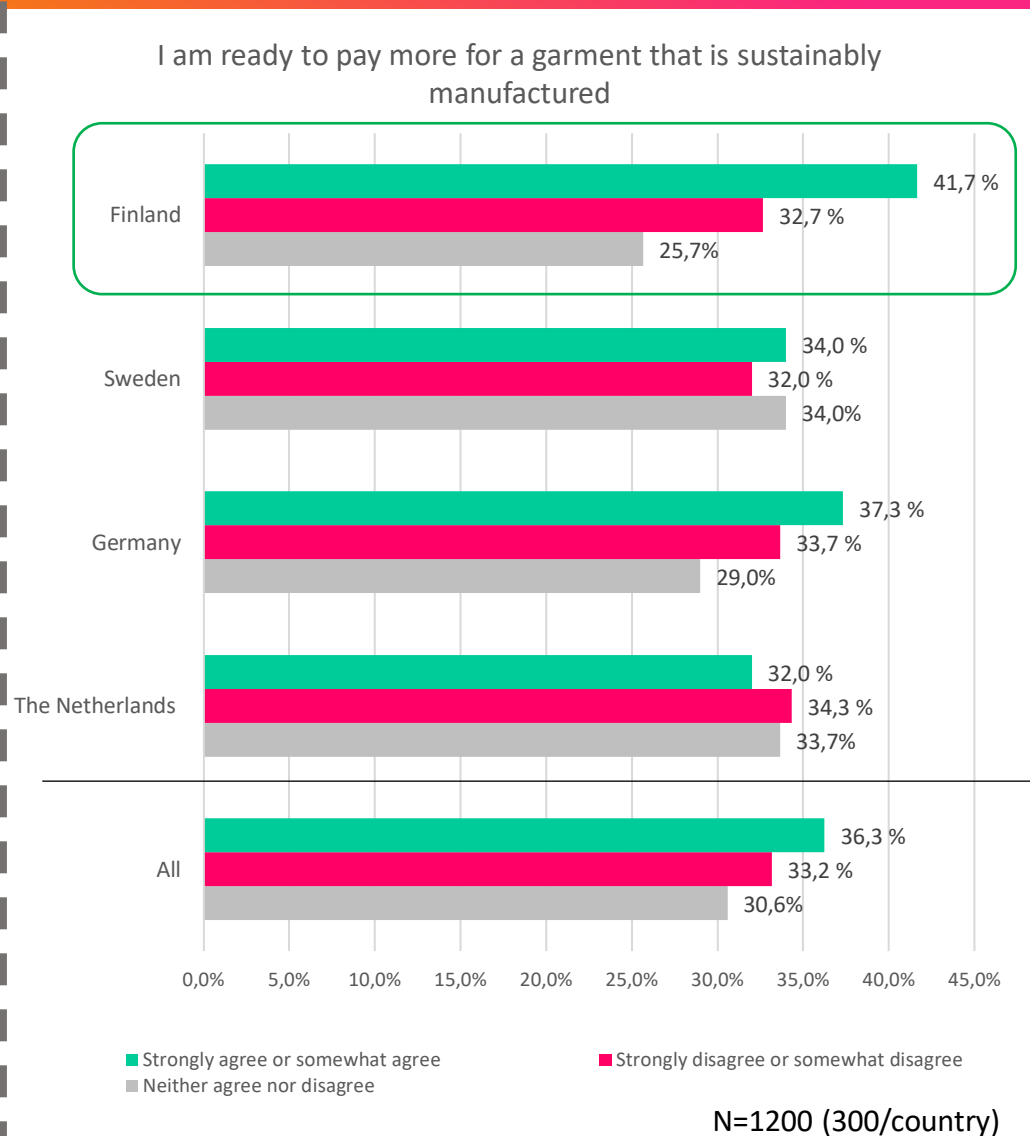
# Price and own financial situation



376 responses (58% of total 646 responses)



## Readiness to pay more for a sustainably manufactured garment\* COUNTRIES



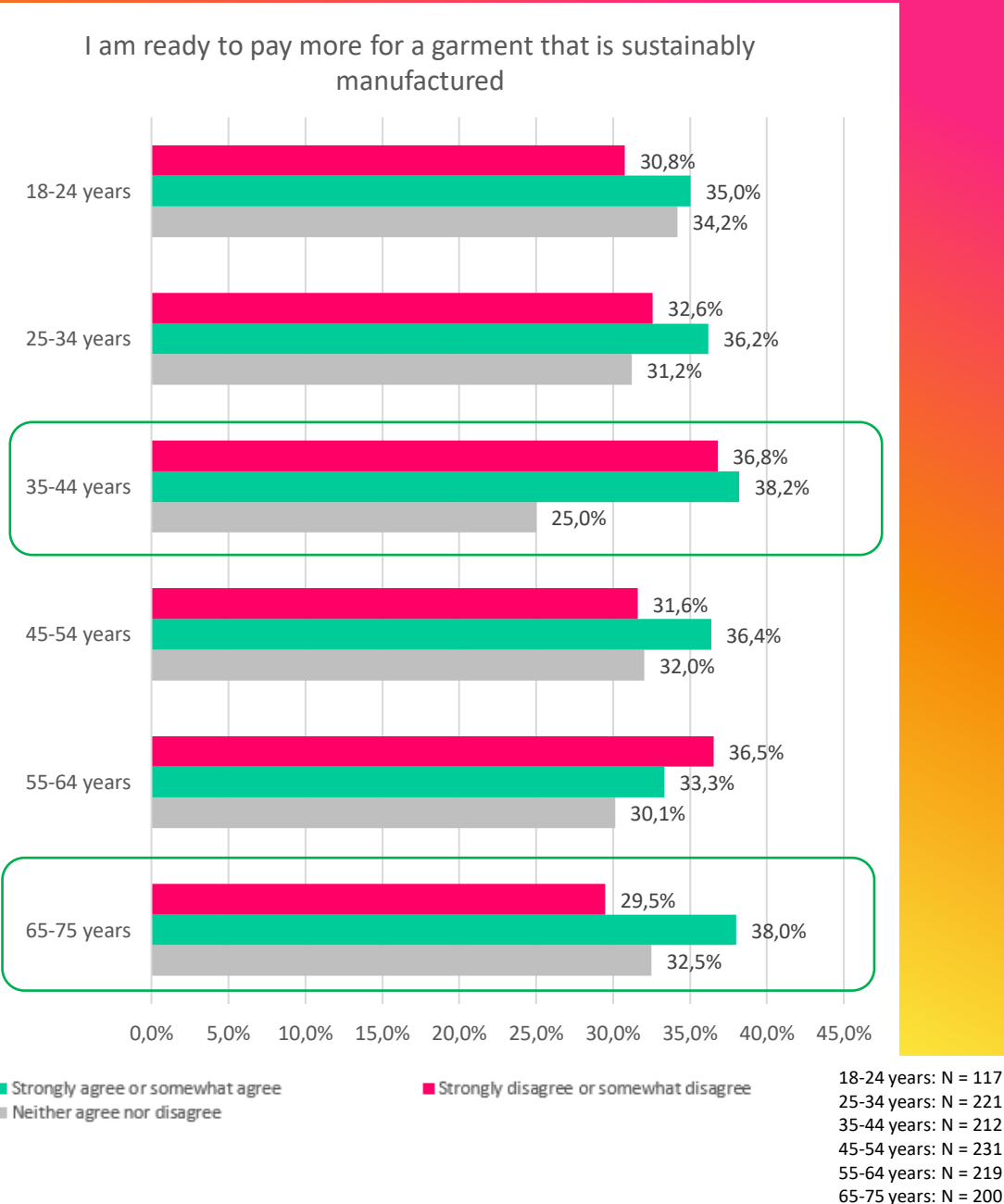
- 36,3% of respondents indicated that **they are ready to pay more** for a garment that is sustainably manufactured
- Still, **most respondents reported either that they are not ready** to pay more for a garment sustainably manufactured, **or were neutral**
- No significant differences between countries, however, the **strongest readiness to pay more for a sustainably manufactured garment was indicated by the Finnish respondents** compared to the other countries

\*When we talk about **sustainably manufactured** garments, we mean garments that differ from similar kind of garments provided by fast fashion companies, in the sense that social sustainability and environmental sustainability are considered in the manufacturing process. By fast fashion we mean garments that are produced cheaply, fast and in large amounts, without considering the social and environmental sustainability aspects.





# Readiness to pay more for a sustainably manufactured garment\* - AGE GROUPS



- The readiness to pay for a sustainably manufactured garment is divided quite evenly among the response scale
- A slightly stronger readiness (*strongly agree & somewhat agree*) was indicated by age groups 35-44 and 65-75
- Still, most respondents from each age group either disagreed or were undecided

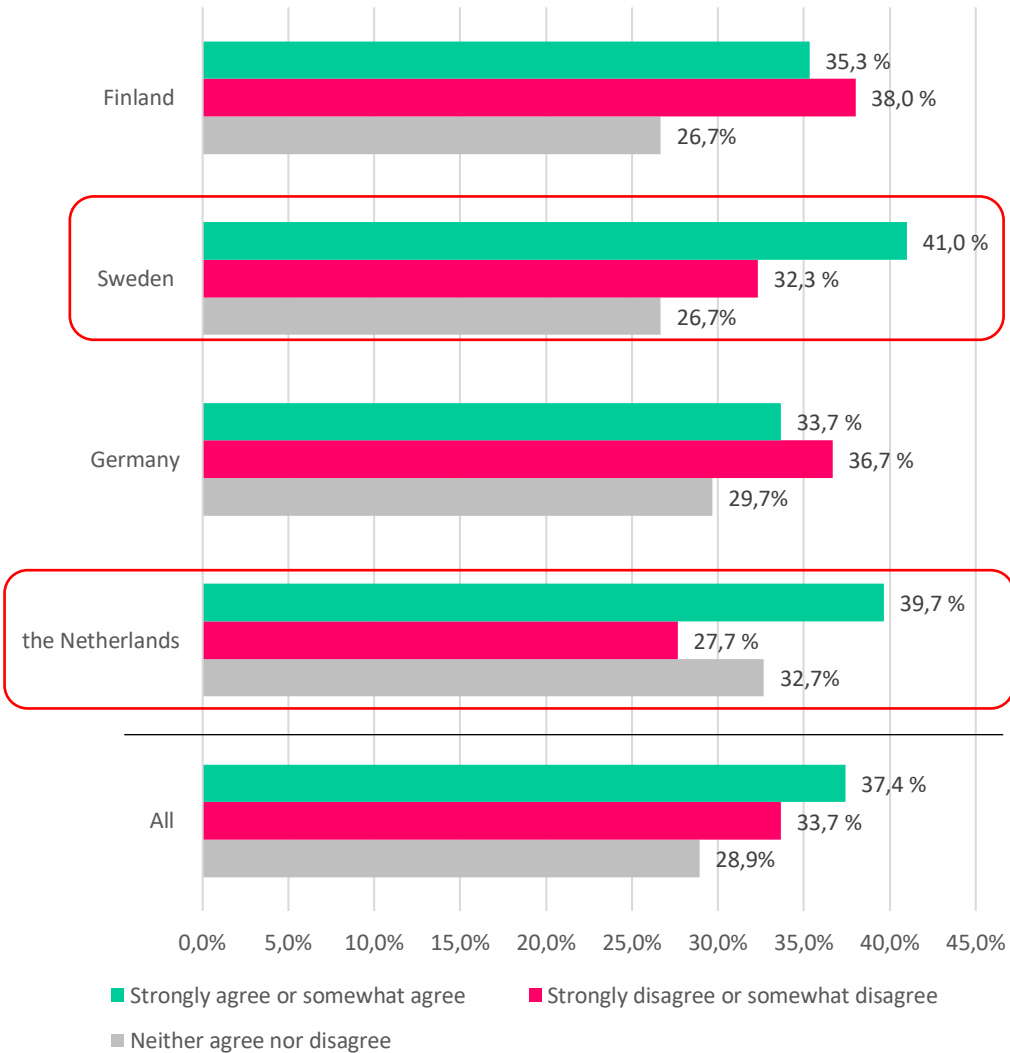
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# Tendency to always look for the cheapest option - COUNTRIES

- Swedish and Dutch respondents reported to be more likely to look for the cheapest option compared to Finnish and German respondents

When I buy garments, I always look for the cheapest option



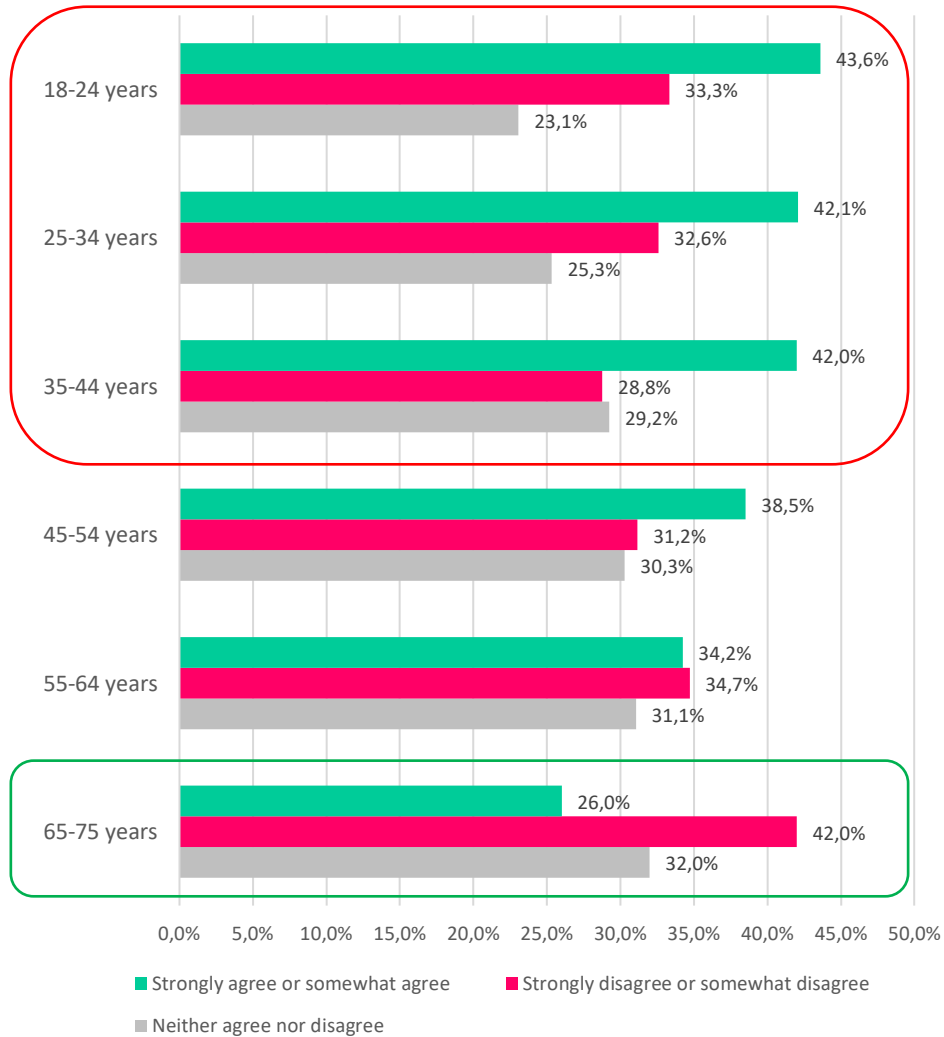
N=1200 (300/country)



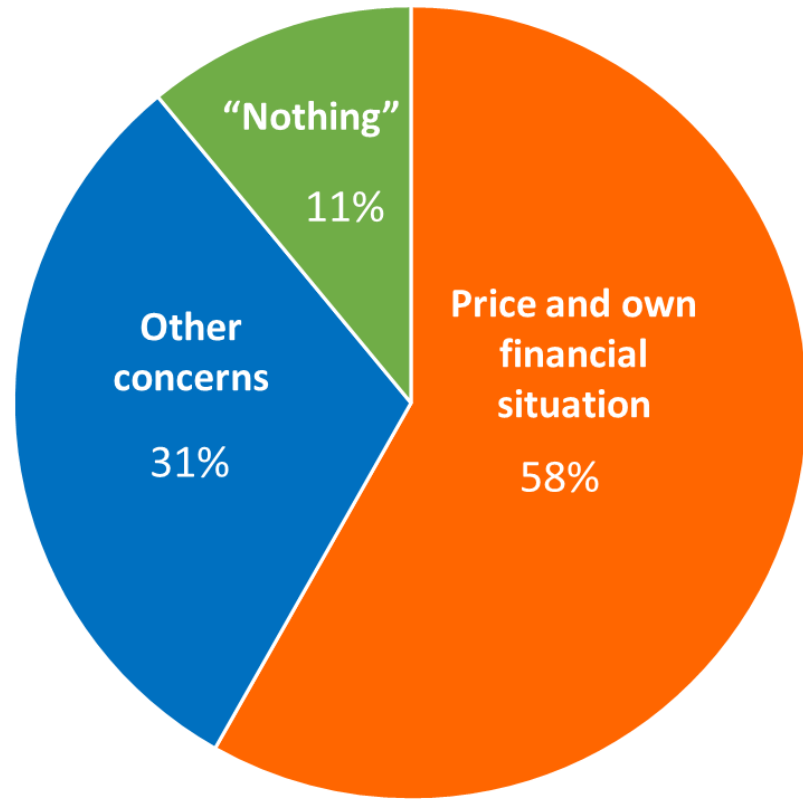
# Tendency to always look for the cheapest option - AGE GROUPS

- From the age groups, respondents between 18-44 years indicated stronger tendency to always look for the cheapest garments
- Respondents from the age group 65-75 years reported lowest tendency to always find the cheapest option

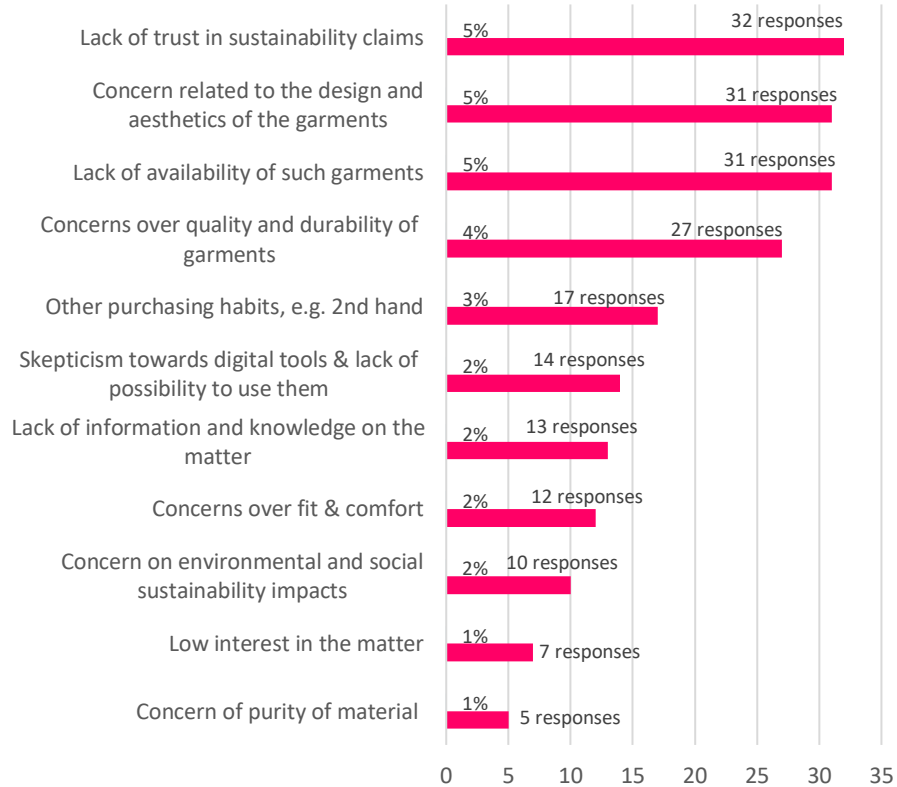
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## Other concerns



## Other concerns

- Apart from the price issue, a lot of variation in responses were found
- **11 “other” categories** were identified
- For these, there were altogether 199 responses
  - 31% of total 646 responses



# Examples



Lack of **trust** in sustainability claims



Concern related to **the design and aesthetics of the garments**



Lack of **availability** of such garments



Concerns over **quality and durability** of garments



Other purchasing habits, e.g. **2nd hand**



**Scepticism towards digital tools** & lack of possibility to use them



# Lack of trust in sustainability claims



*"I don't trust the manufacturers, you can say and write a lot, but I can't keep track of whether that's actually true. A lot is always promised, but only a tiny fraction of it is true."*  
- Consumer from Germany

*"I don't trust the whole environmental movement because I have the feeling that governments and environmental movements only want to ensure that as much money as possible can be squeezed out of consumers under the motto of the environment"*  
- Consumer from the Netherlands

*"It depends on (the price and) how much I trust that it really is what it says and not greenwashing."*  
- Consumer from Sweden

*"There is currently a lot of tampering with these types of labels and I am therefore hesitant to believe this"*  
- Consumer from the Netherlands

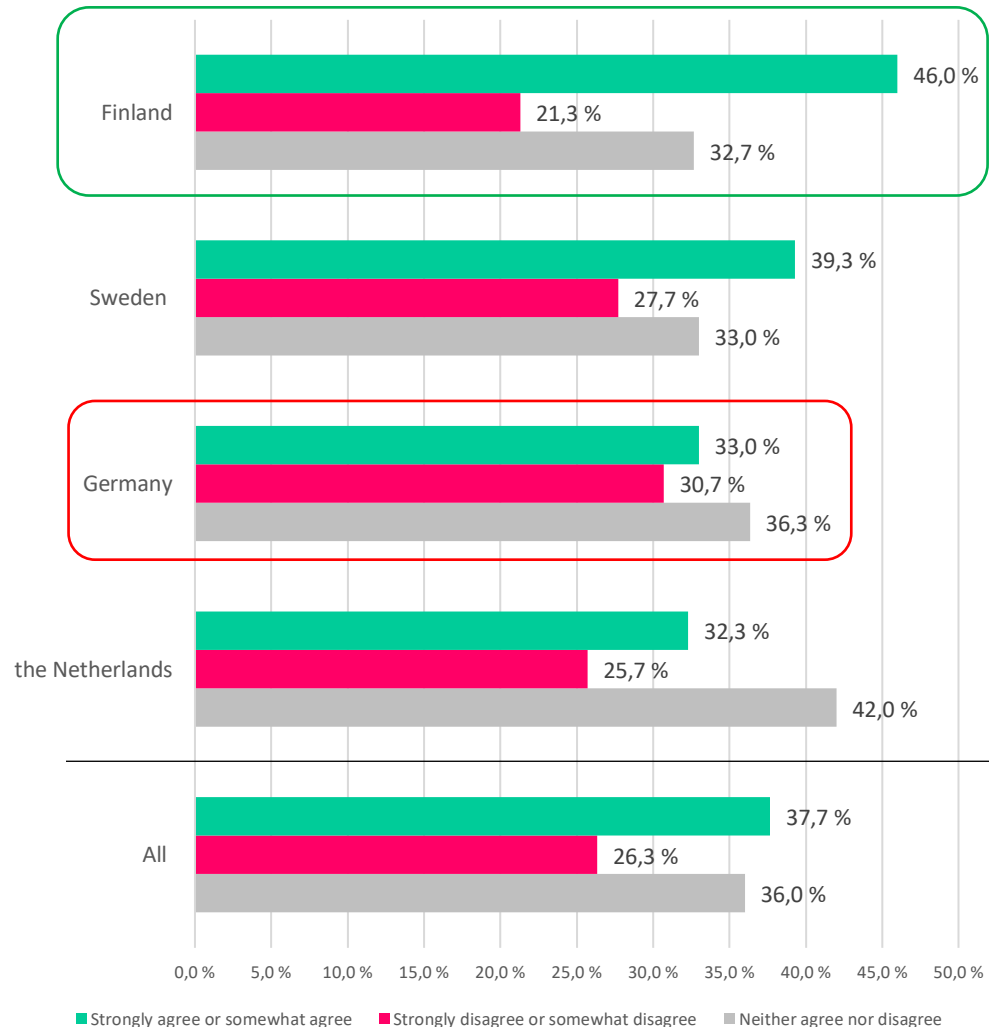
*"Do not trust that the information is actually correct."*  
- Consumer from Sweden

*"This is just greenwashing, nothing will change."*  
- Consumer from Germany

*"it is a marketing trick."*  
- Consumer from the Netherlands



I trust the sustainability claims and environmental certificates on garments



N=1200 (300/country)

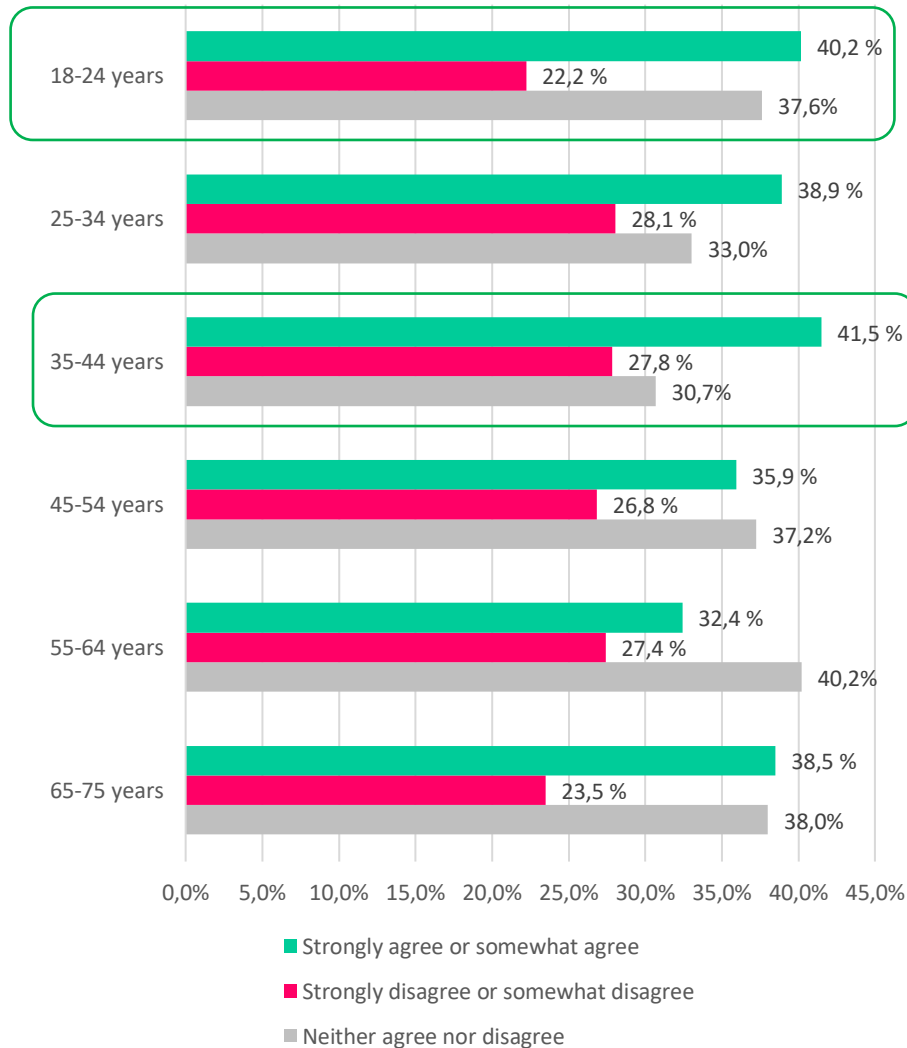
## Trust of European consumers in sustainability claims -COUNTRIES

- As a part of the survey, the respondents were also asked about their trust in sustainability claims and environmental certificates
- The majority of respondents disagreed or were neutral, while 38% indicated that they do have trust in them
  - Finns had a stronger trust than other countries
  - Also respondents from Sweden had stronger trust than from Germany and the Netherlands
  - Respondents from Germany and the Netherlands were mostly neutral





I trust the sustainability claims and environmental certificates on garments



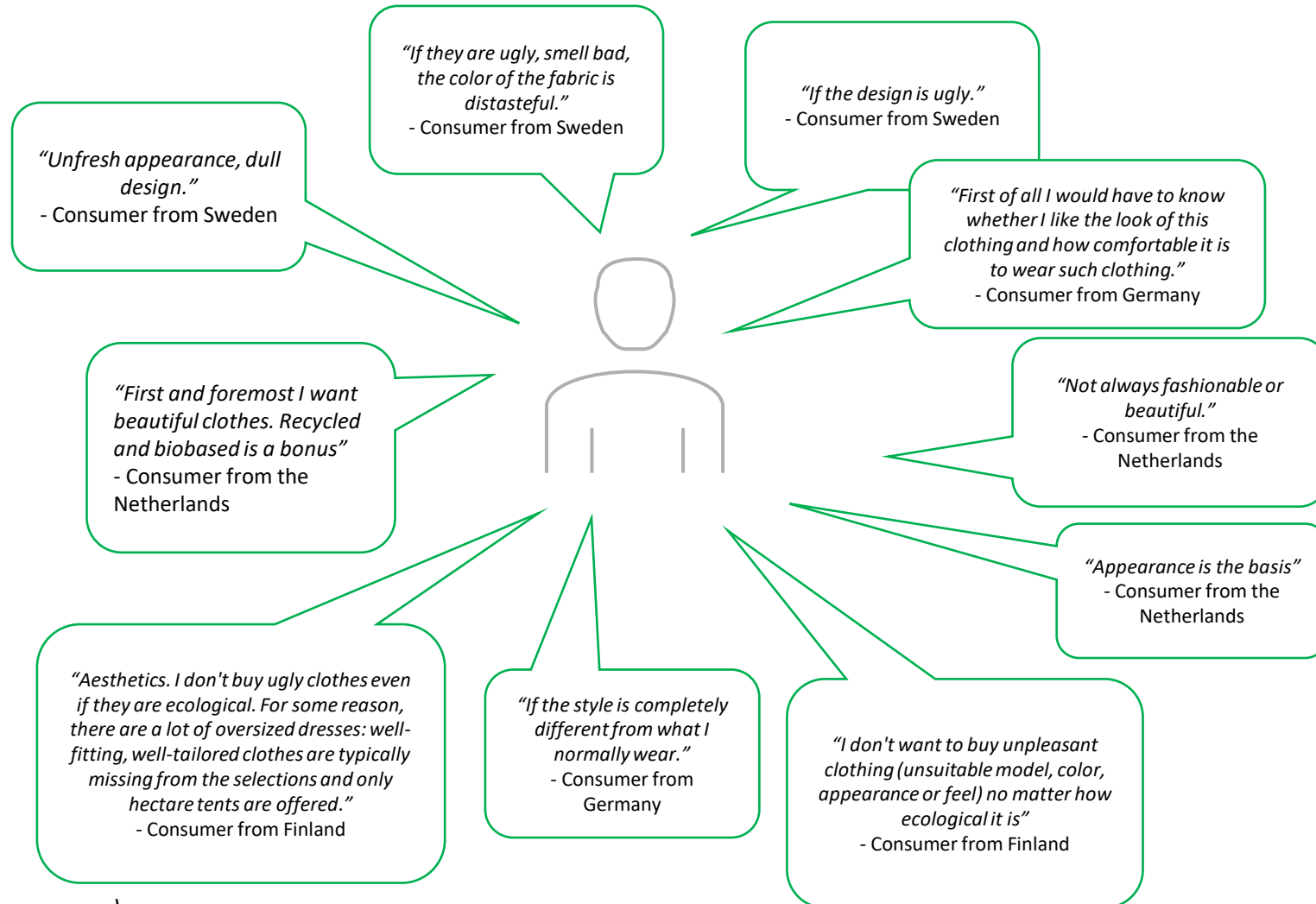
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## Trust of European consumers in sustainability claims - AGE GROUPS

- Among age groups, the strongest trust was indicated by age groups of 18-24 years and 35-44 years

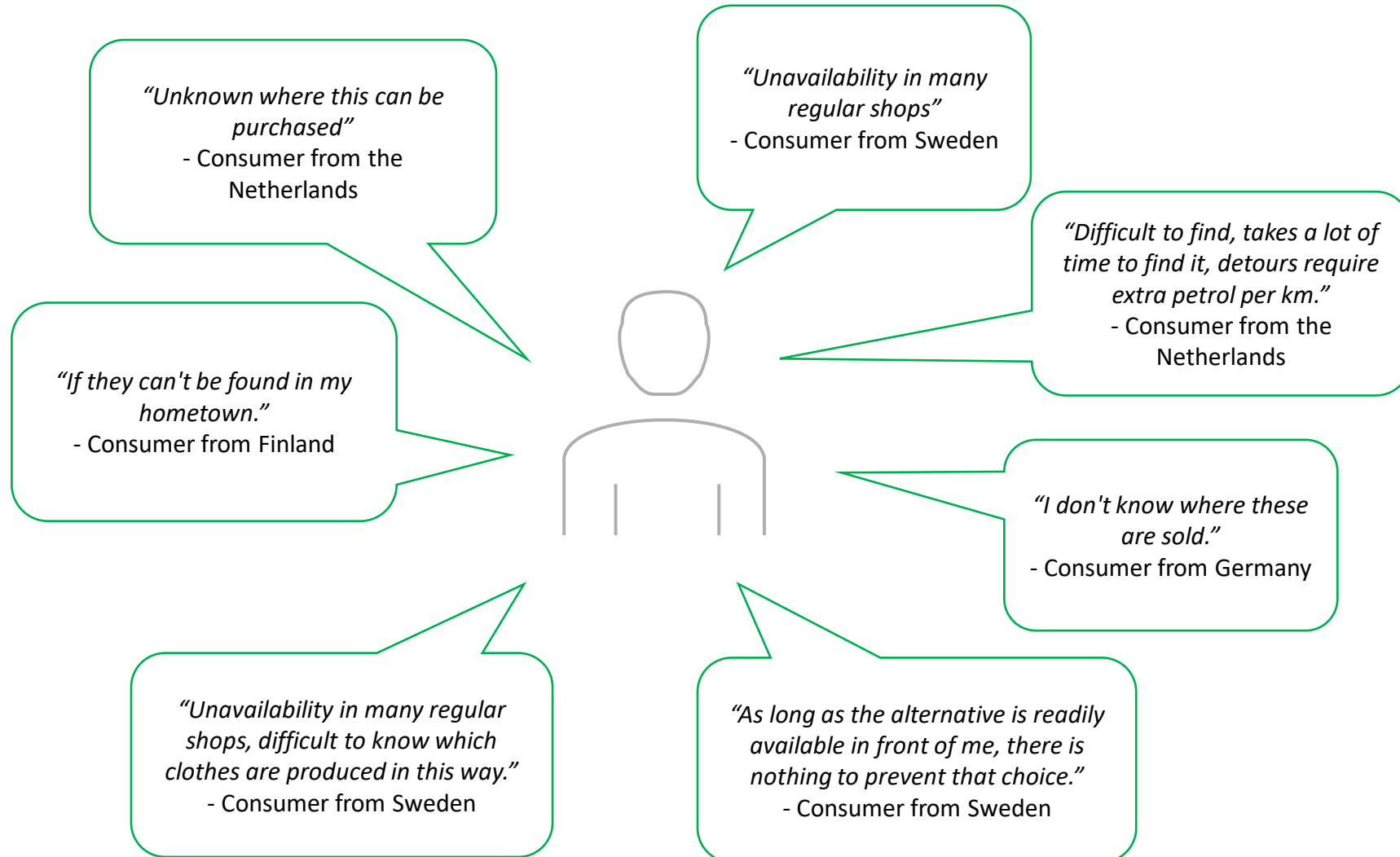


# Concern related to the design and aesthetics of the garments



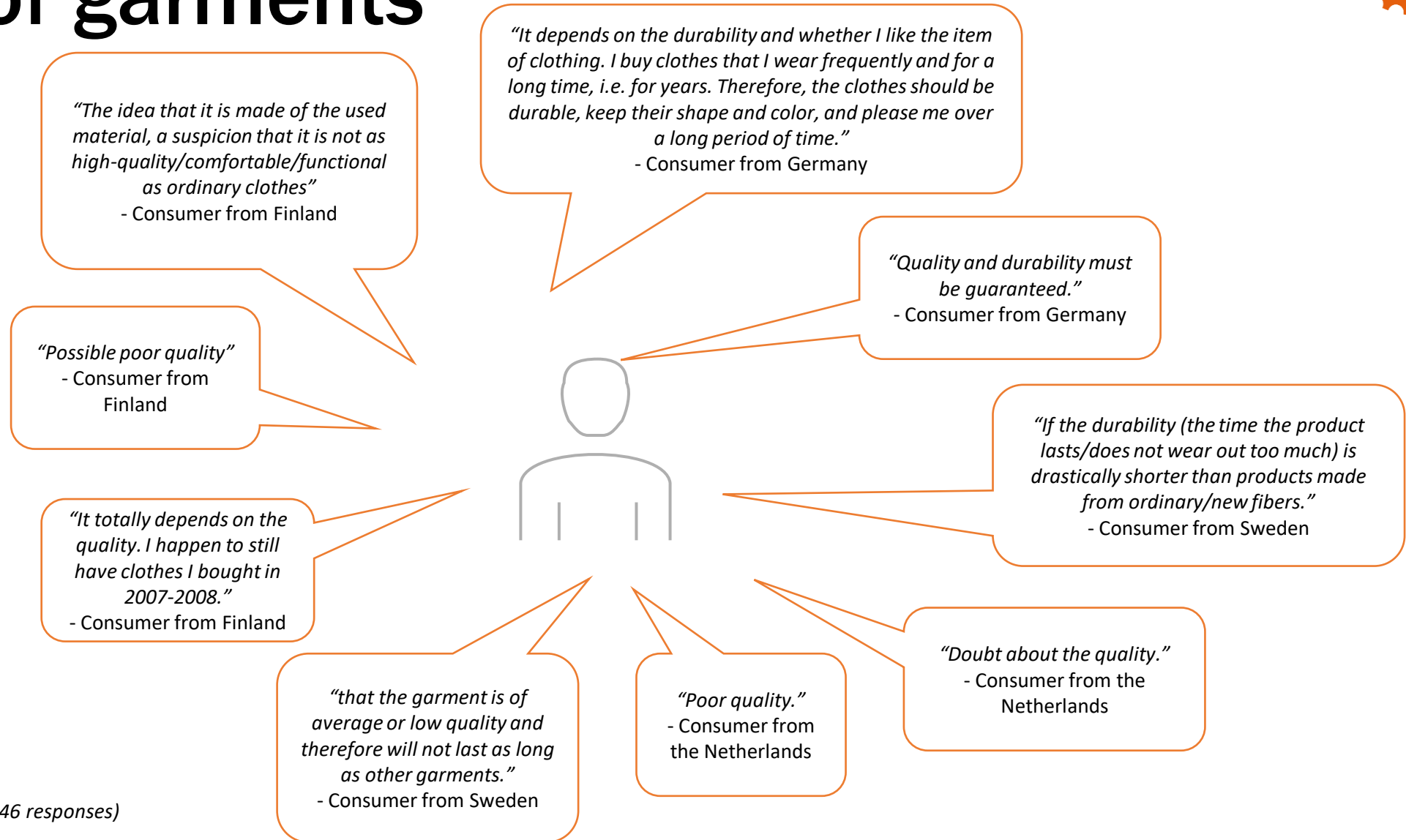


# Lack of availability of such garments



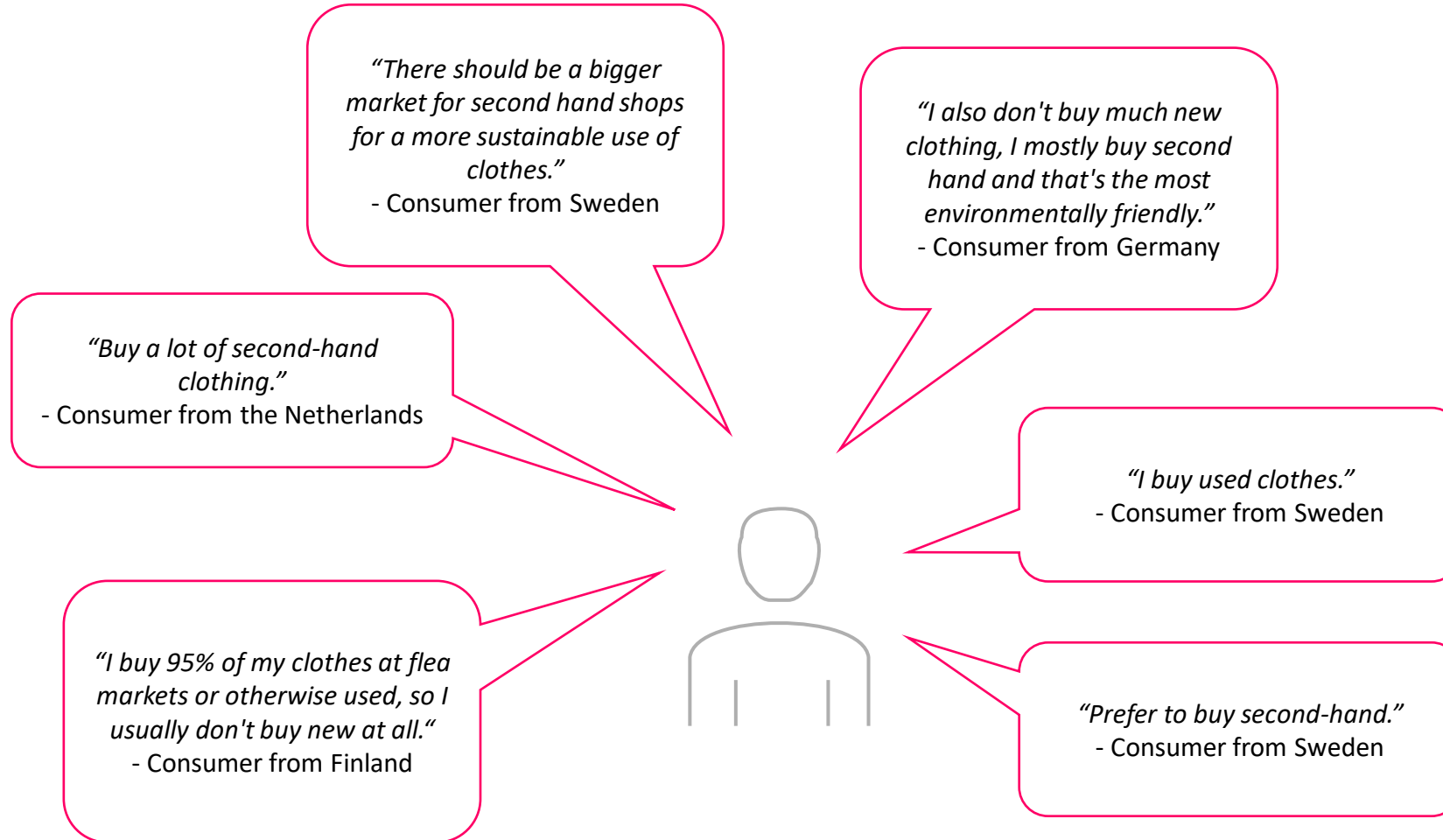


# Concerns over quality and durability of garments



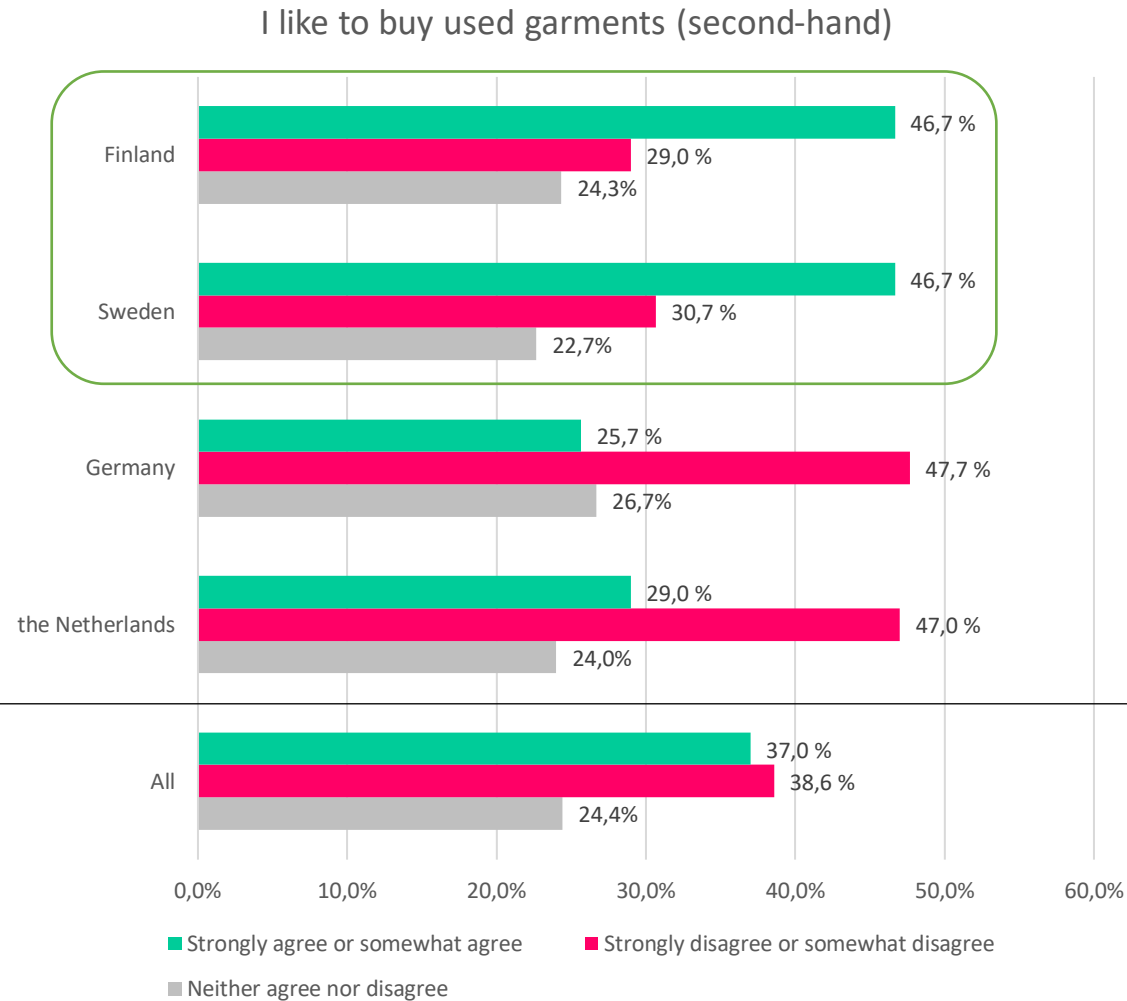


# Other purchasing habits, e.g. second hand





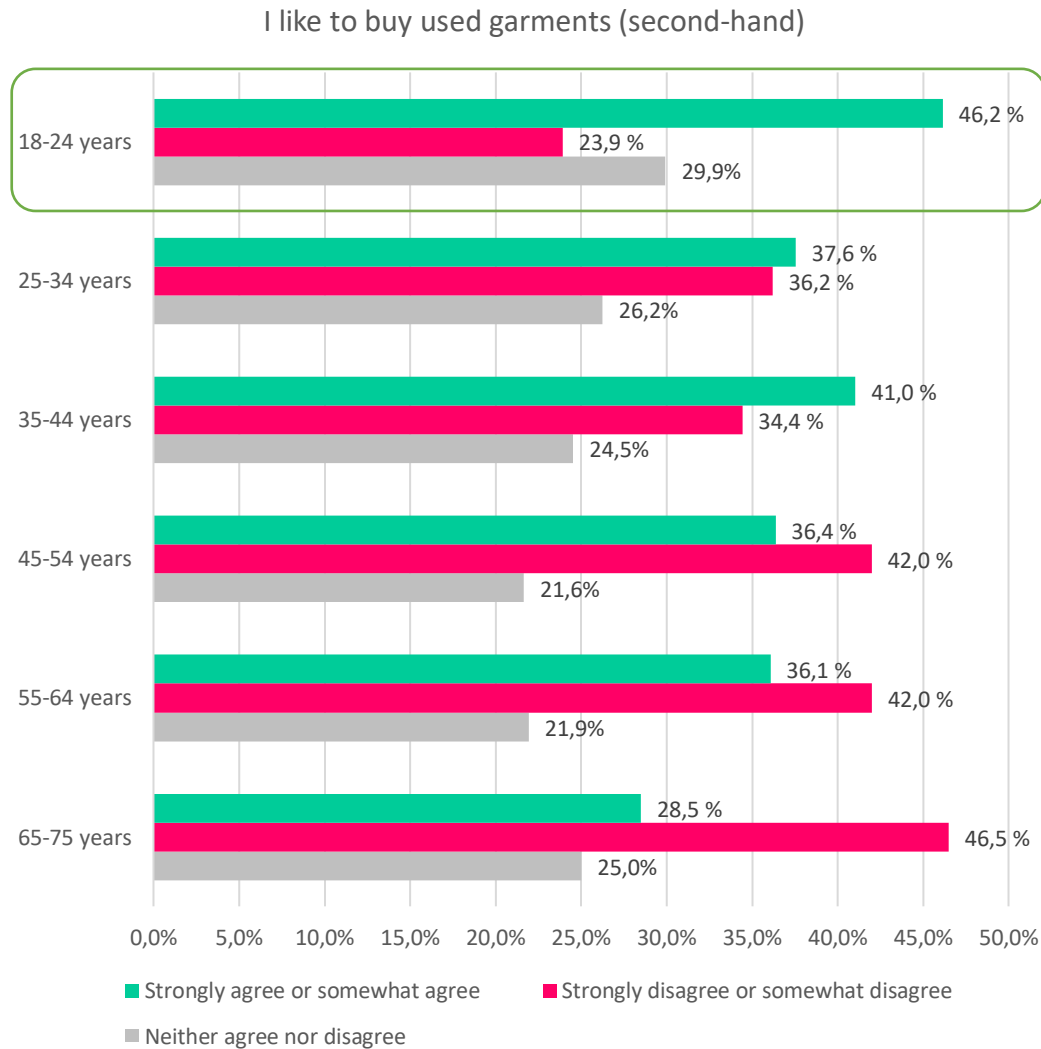
# Consumer attitude towards second hand purchasing - COUNTRIES



- As part of the survey, the respondents were also asked about their perception on second hand buying
- The Finnish and Swedish respondents reported more positive views compared to German and Dutch respondents



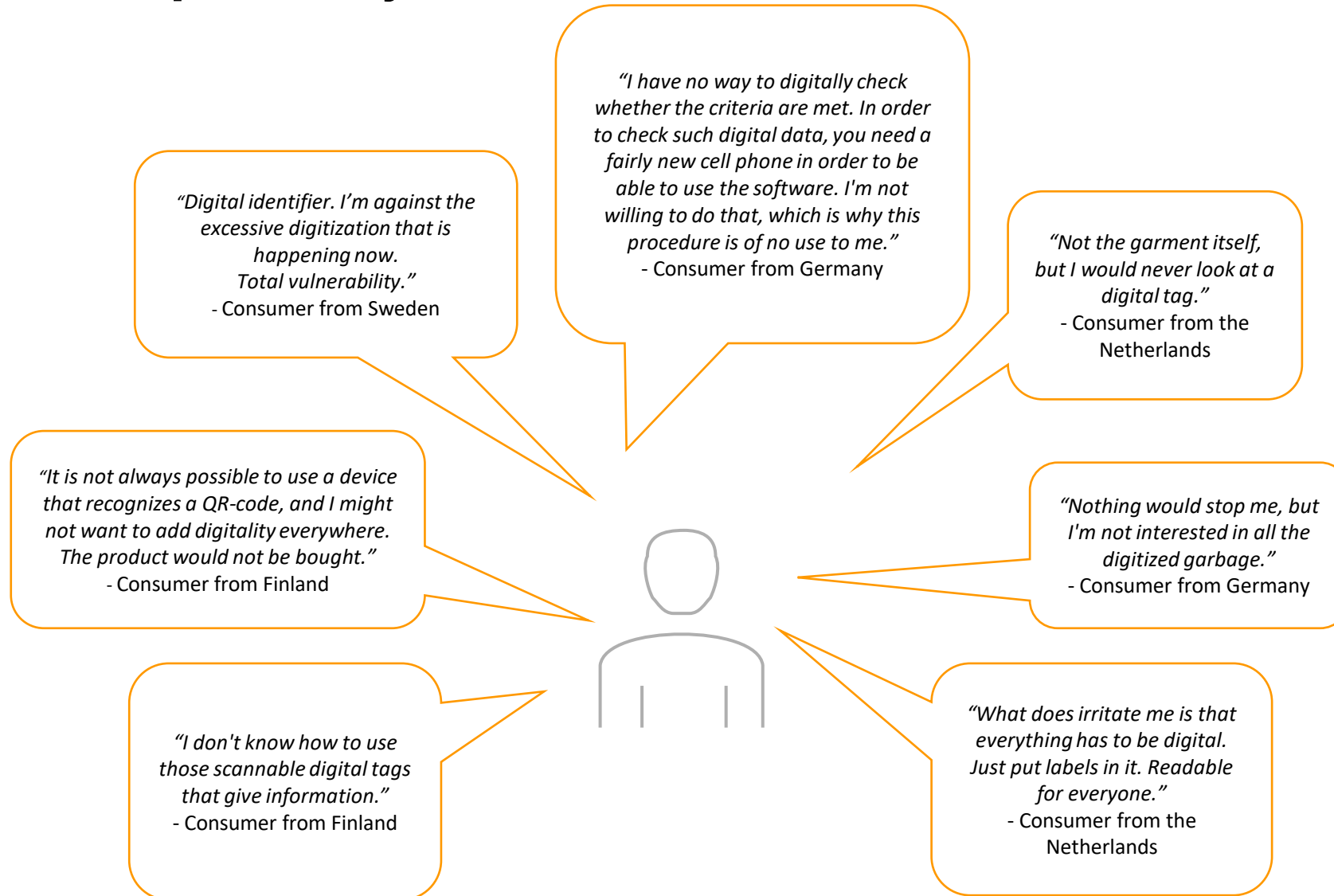
# Consumer attitude towards second hand purchasing - AGE GROUPS



- From the age groups, the youngest age group (18-24) reported the most positive perceptions
- Also the age group 35-44 reported more positive perception compared to older groups



## Skepticism towards digital tools & lack of possibility to use them







## No barriers to purchasing such garments

- 71 responses related to no reasons to purchase such garments
  - 11% of total 646 responses



# "Nothing"



# Conclusions

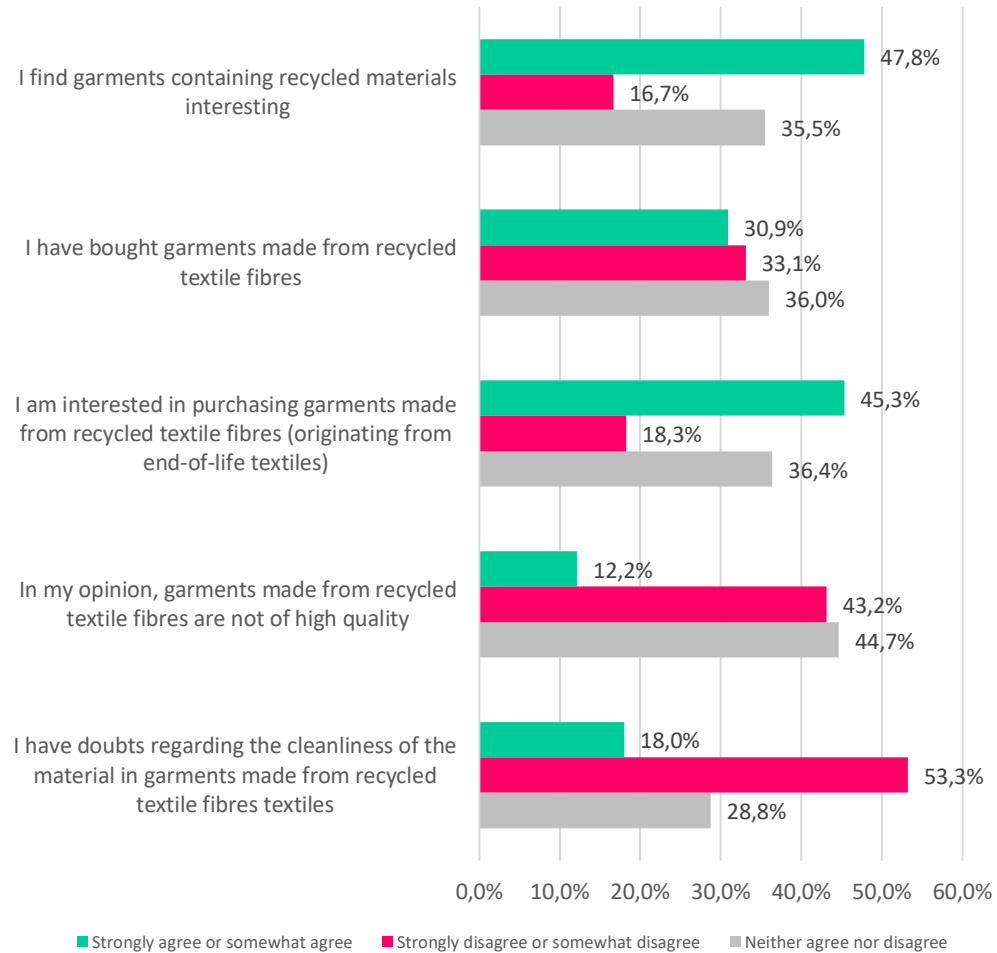


- Generally, the European respondents have a very positive attitude towards the circular textile scenario
- The recyclability of the garment and locally recycled material and manufacture of garment (within Europe) were most effective factors affecting the purchase decision
- Unsurprisingly, the main barrier of purchasing such a garment is price and own financial situation
  - Other barriers included e.g. lack of trust in sustainability claims; concern related to the design and aesthetics of the garments; lack of availability of such garments and concerns over quality and durability of garments
- The identified barriers provide us indication on which factors to focus on in the design of products and marketing strategies
  - How to increase trust on sustainability claims?
  - How to answer the durability and longevity requirements?
  - How to move pass the “stuffy” image of garments with recycled material?
  - What kind of methods should be used to increase consumer’s awareness of such garments?
  - How to ensure easy access to such garments?





**Attitudes towards recycled  
fibres in garments and  
recycling of textiles**

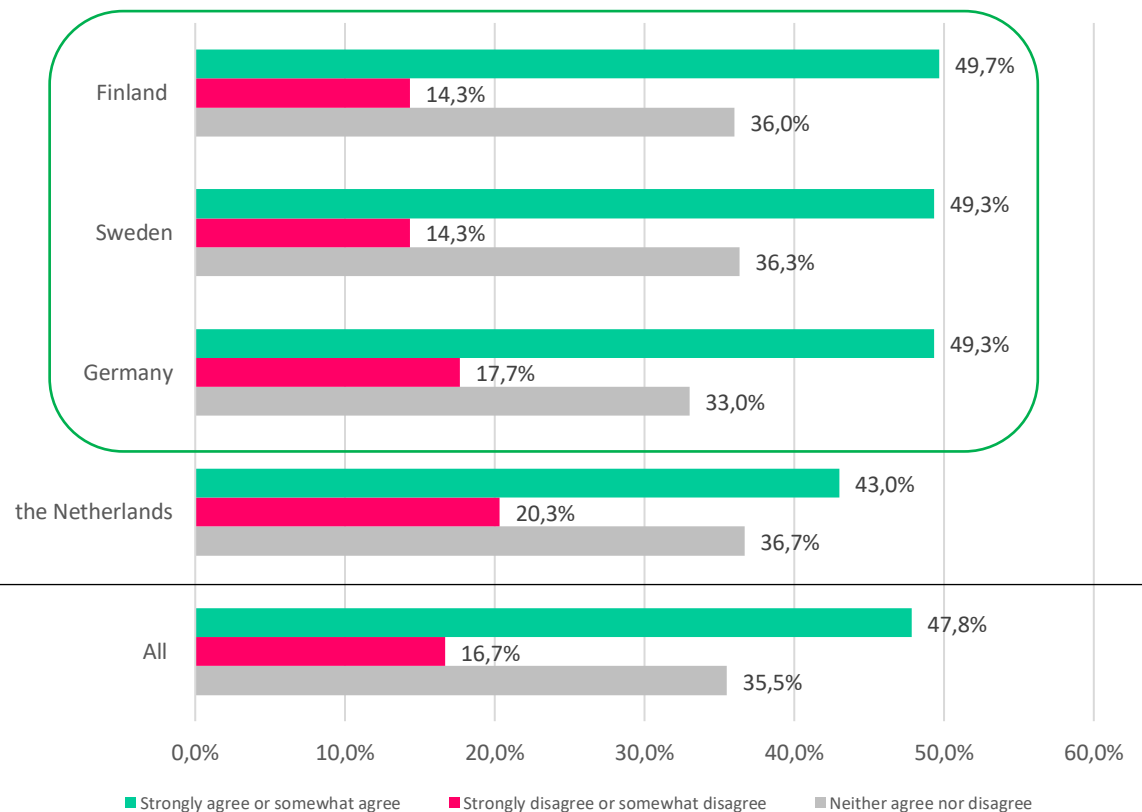


## Consumer attitudes towards recycled content in garments



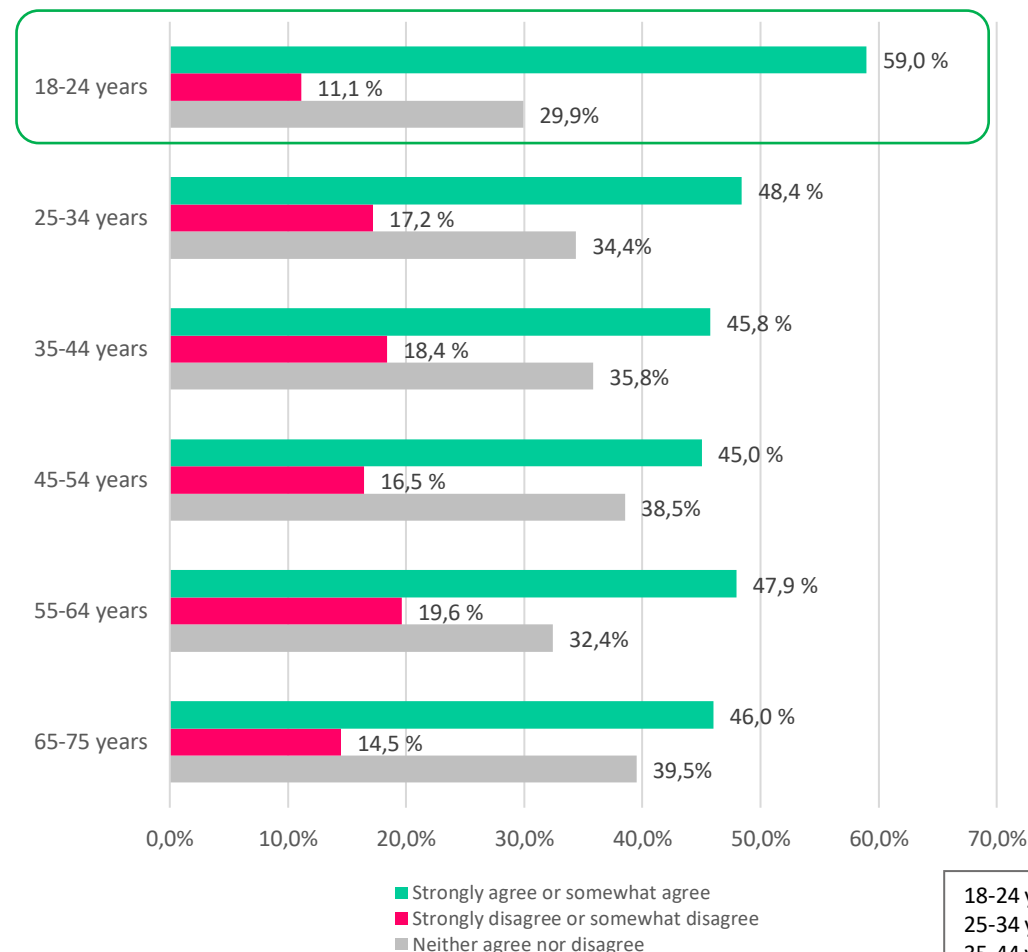
# I find garments containing recycled materials interesting

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N=1200 (300/country)

I find garments containing recycled materials interesting

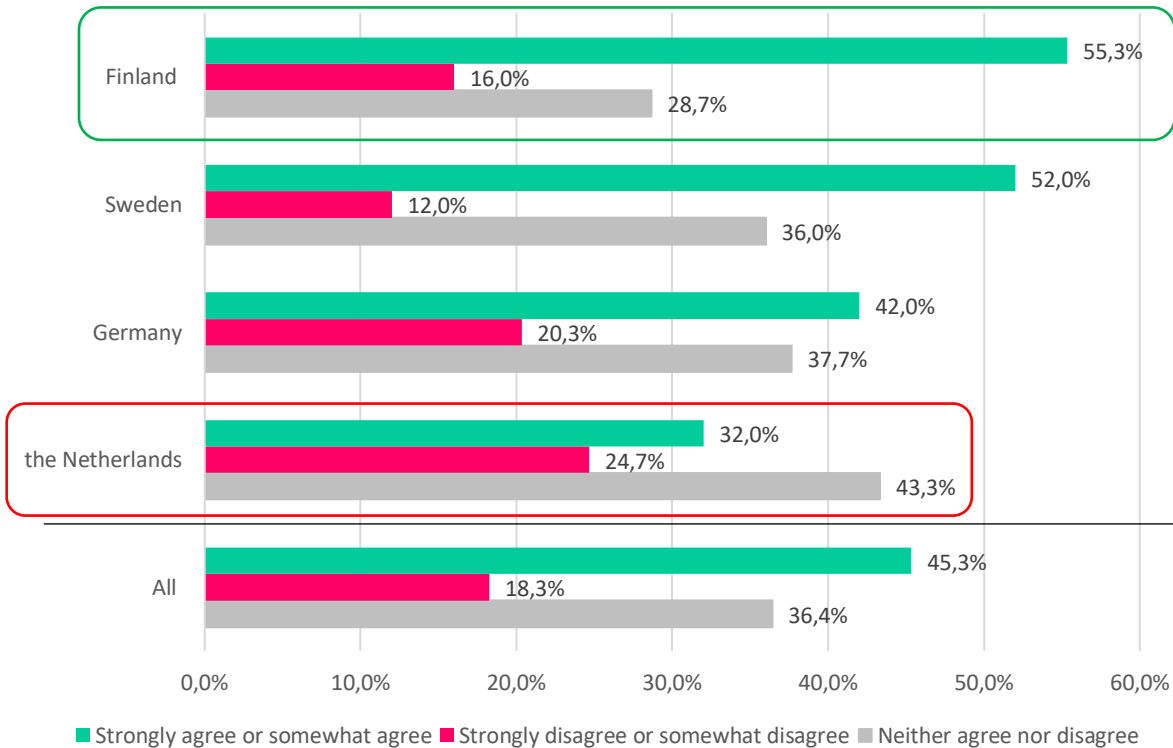


18-24 years: N = 117  
25-34 years: N = 221  
35-44 years: N = 212  
45-54 years: N = 231  
55-64 years: N = 219  
65-75 years: N = 200

# I am interested in purchasing garments made from recycled textile fibres (originating from end-of-life textiles)

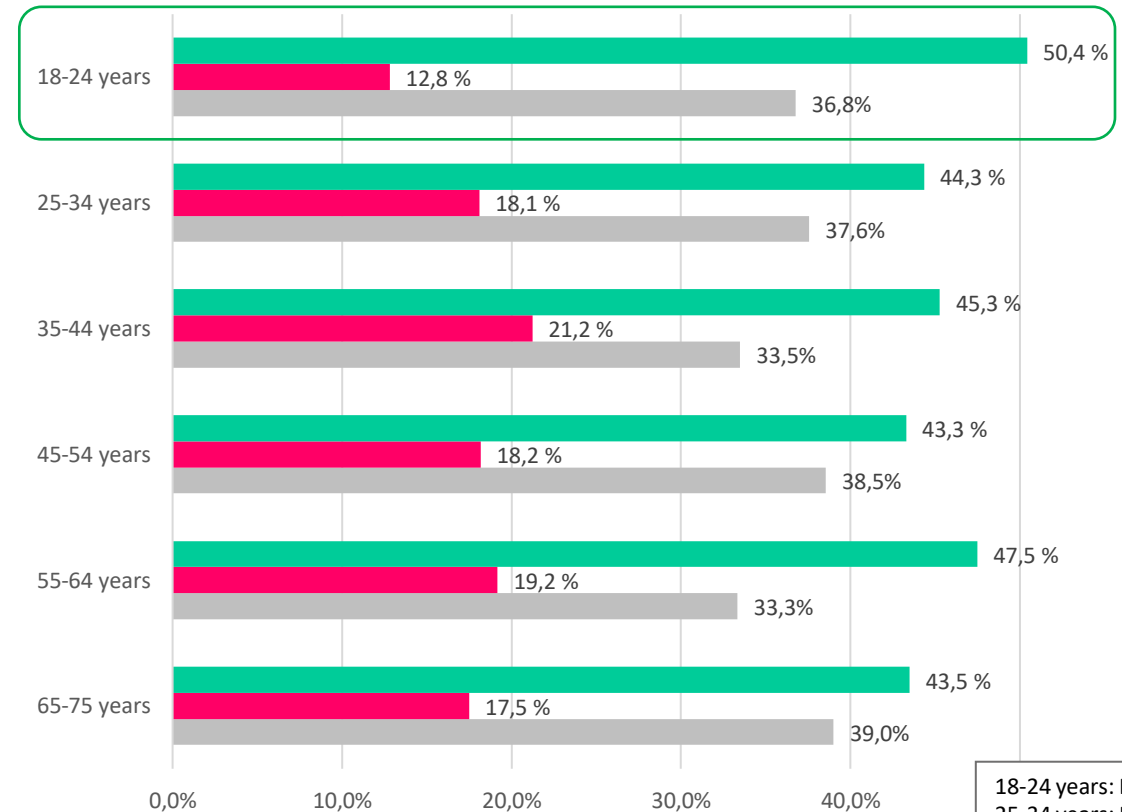


I am interested in purchasing garments made from recycled textile fibres (originating from end-of-life textiles)



N=1200 (300/country)

I am interested in purchasing garments made from recycled textile fibres (originating from end-of-life textiles)



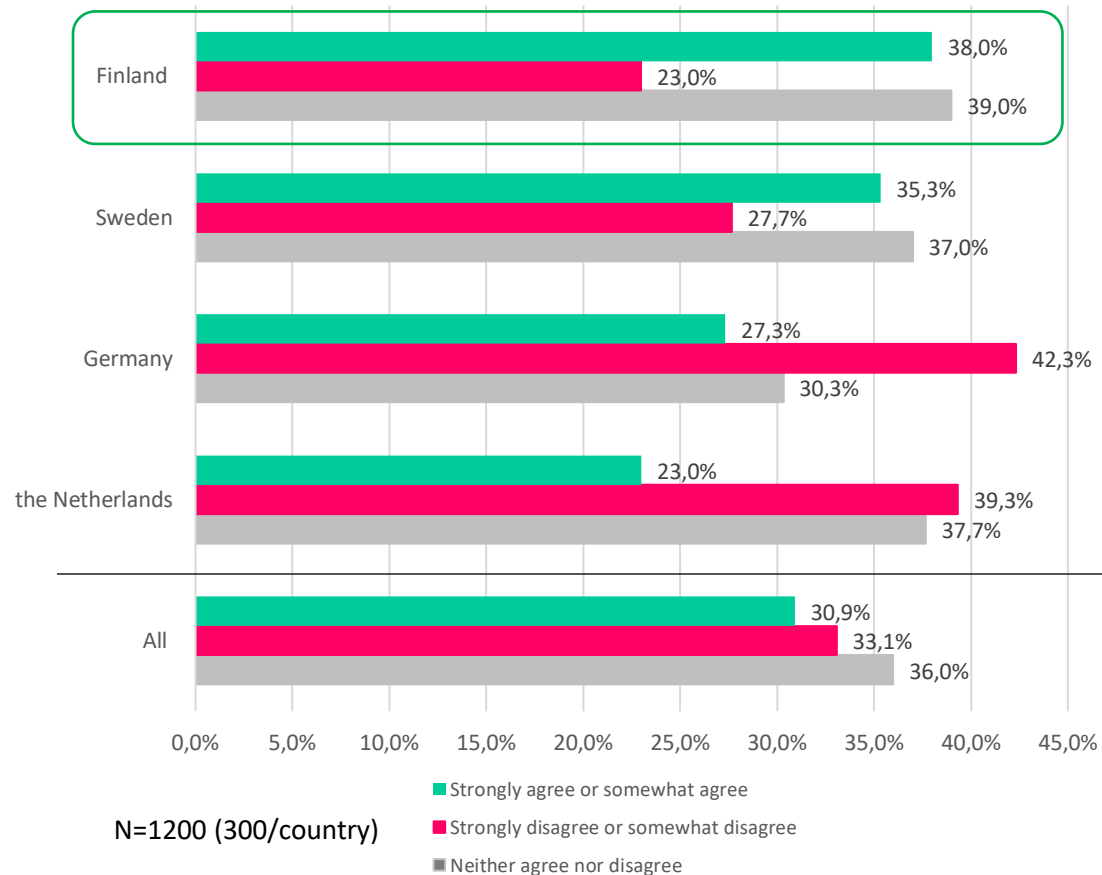
■ Strongly agree or somewhat agree  
■ Strongly disagree or somewhat disagree  
■ Neither agree nor disagree

18-24 years: N = 117  
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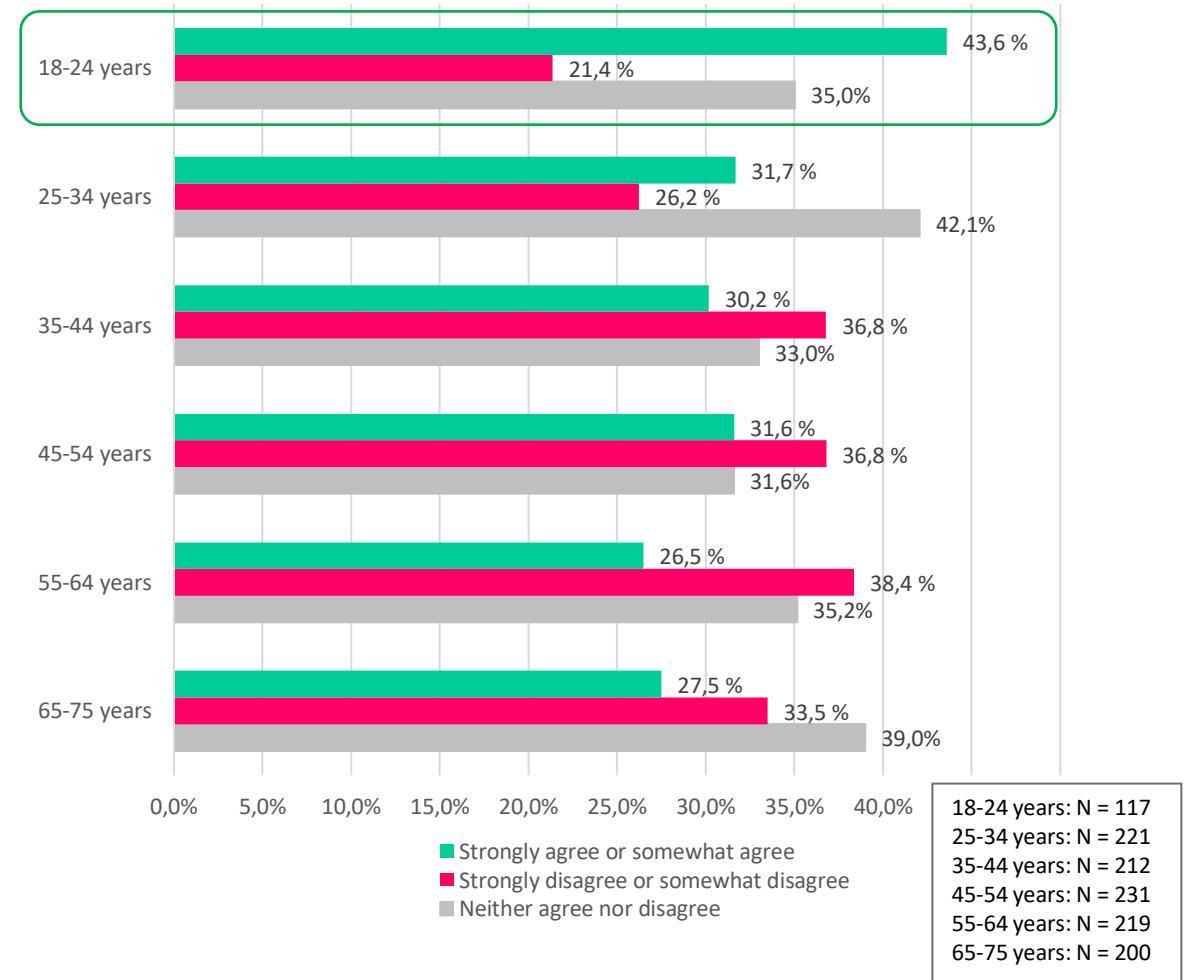
# I have bought garments made from recycled textile fibres



I have bought garments made from recycled textile fibres



I have bought garments made from recycled textile fibres

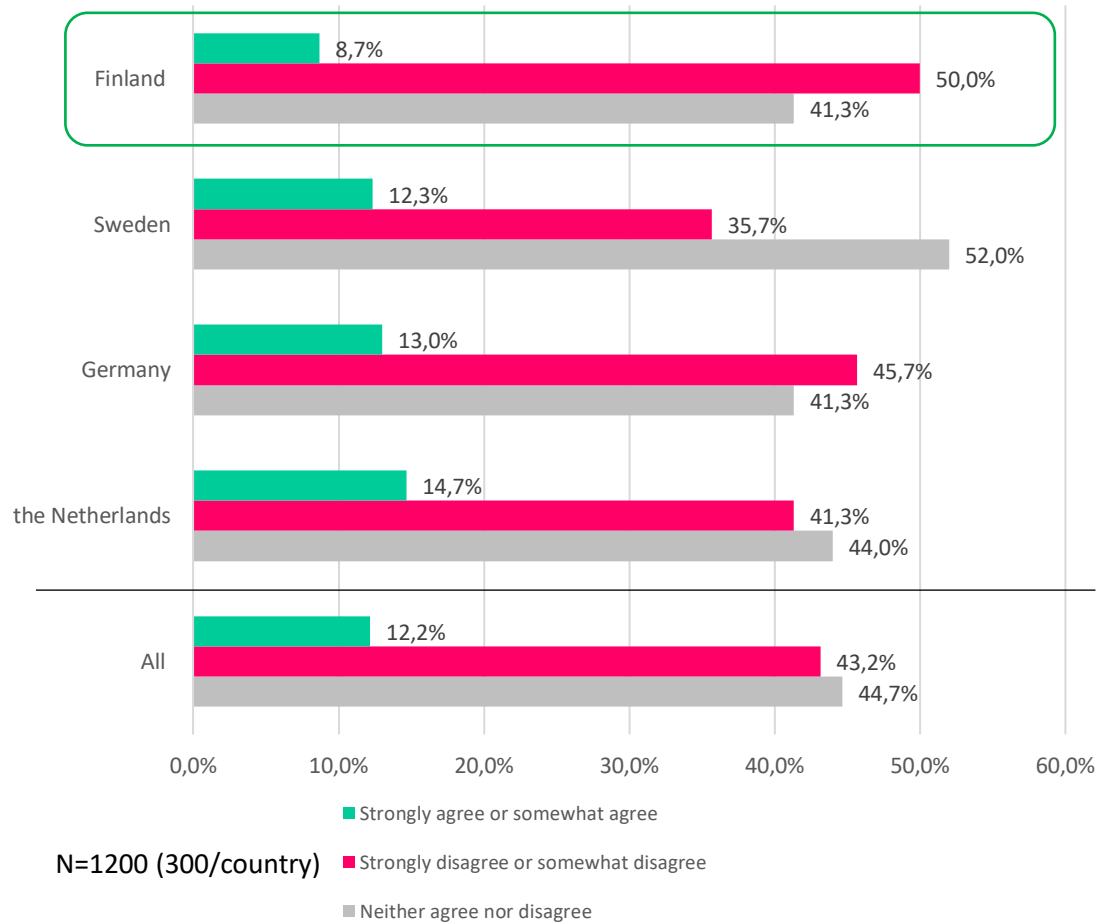




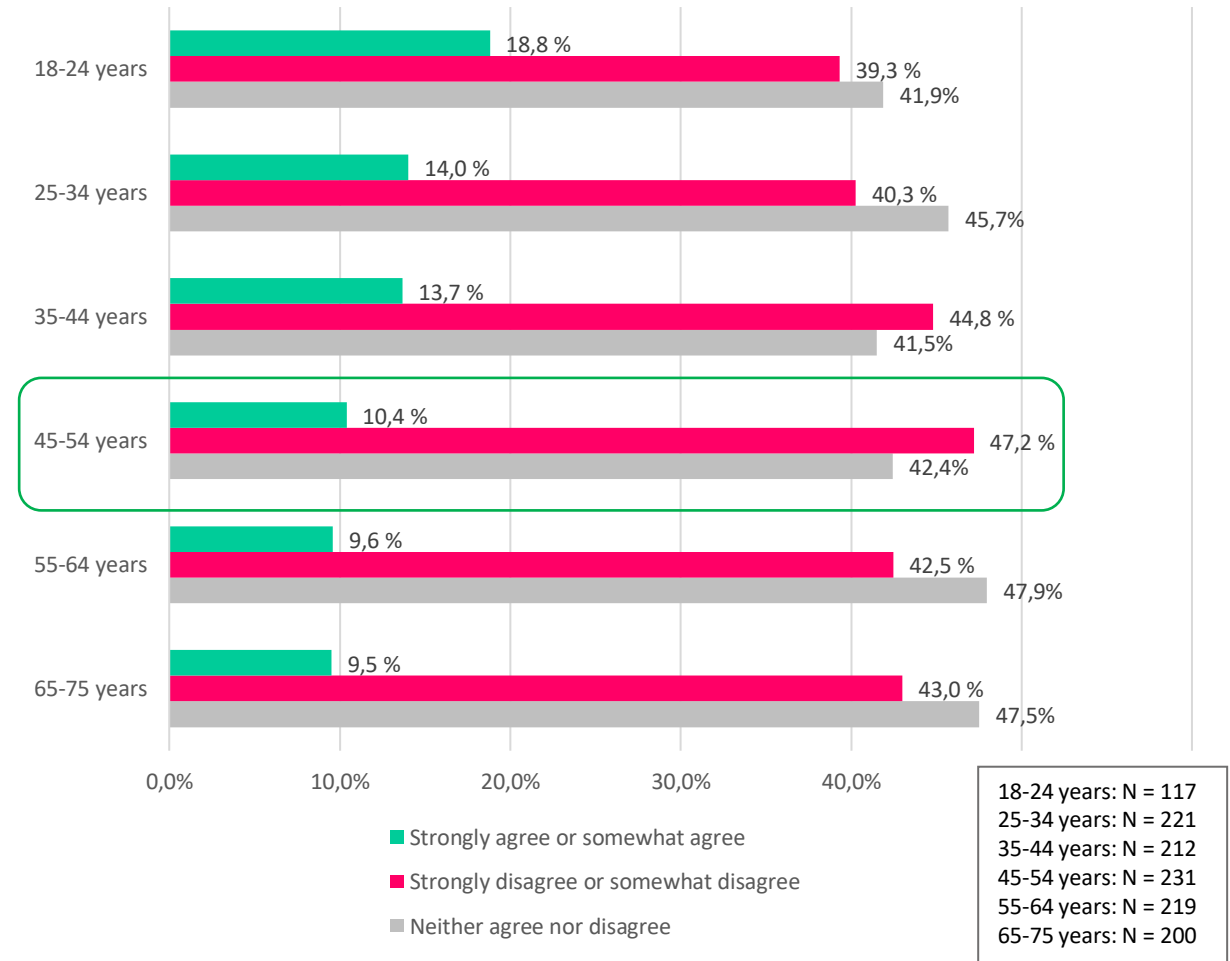
# In my opinion, garments made from recycled textile fibres are not of high quality



In my opinion, garments made from recycled textile fibres are not of high quality



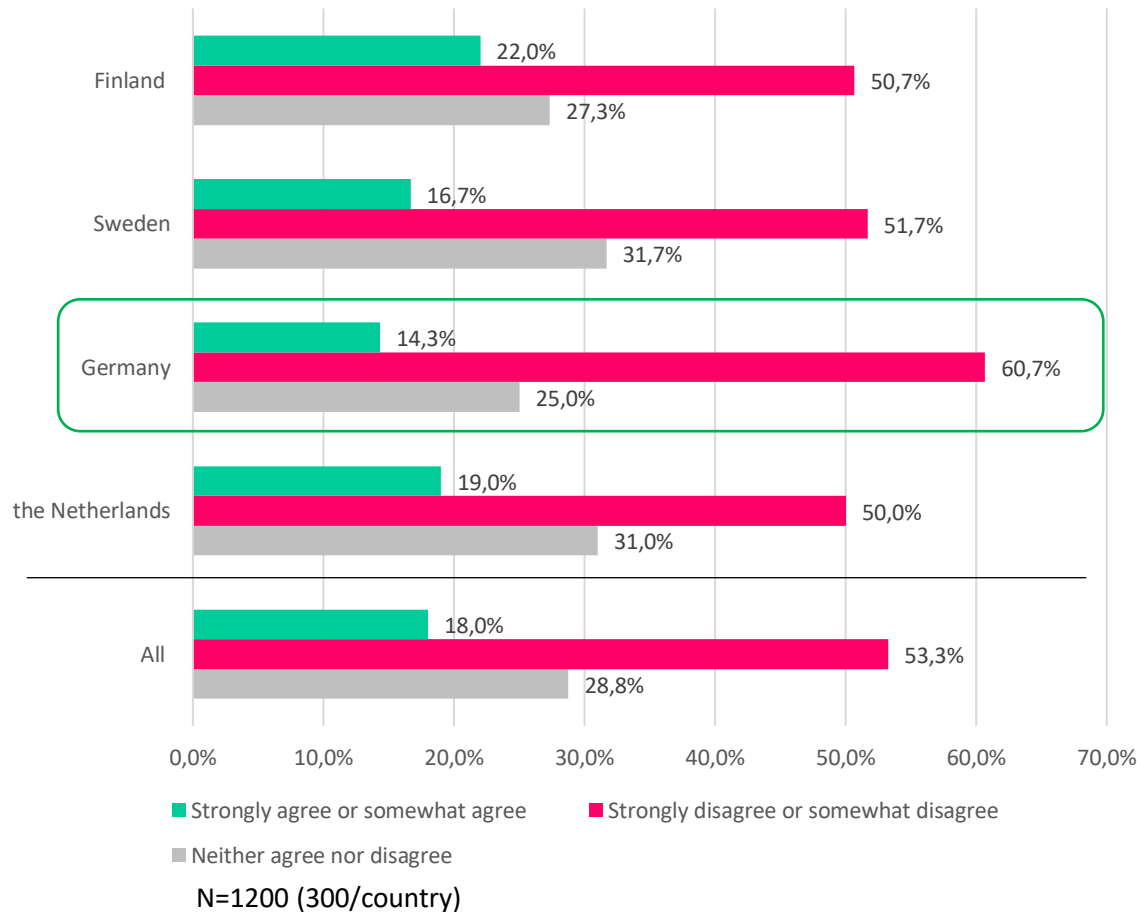
In my opinion, garments made from recycled textile fibres are not of high quality



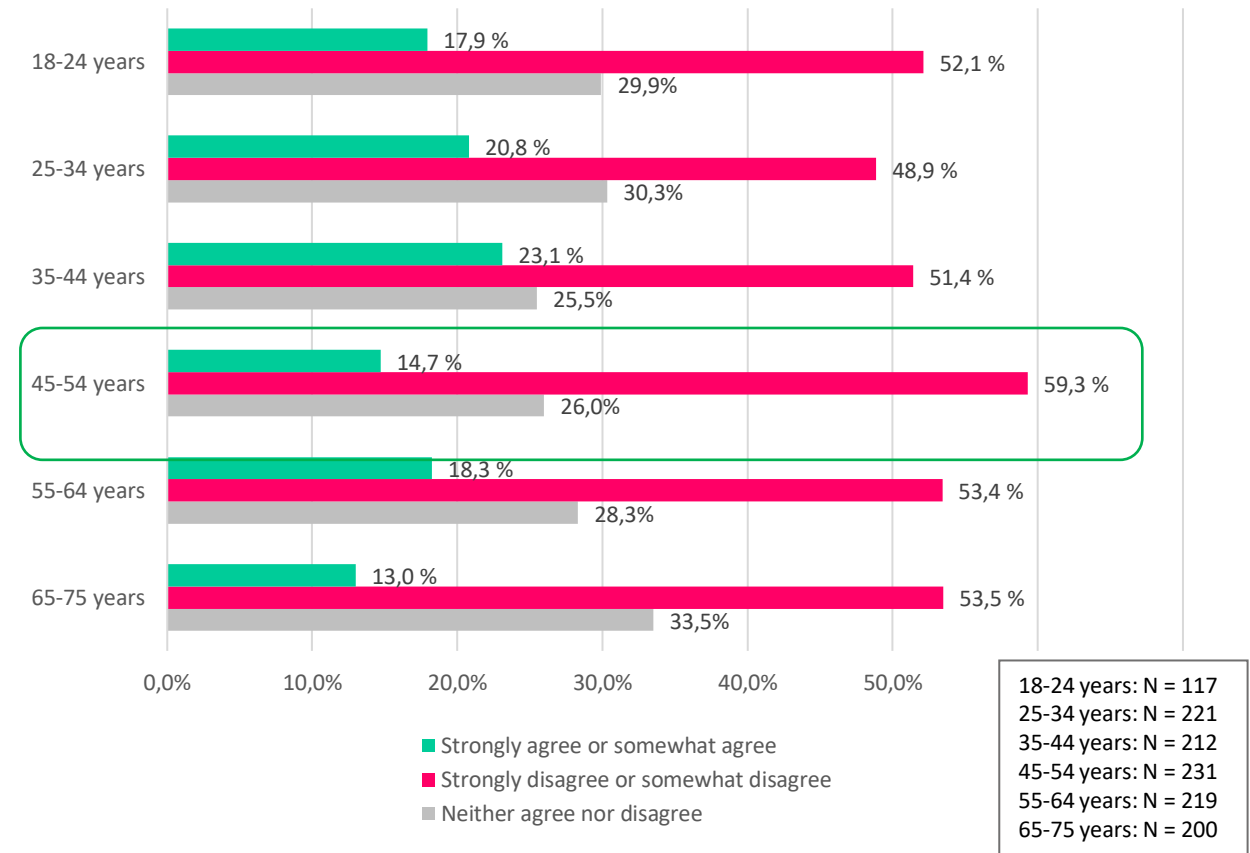
# I have doubts regarding the cleanliness of the material in garments made from recycled textile fibres textiles



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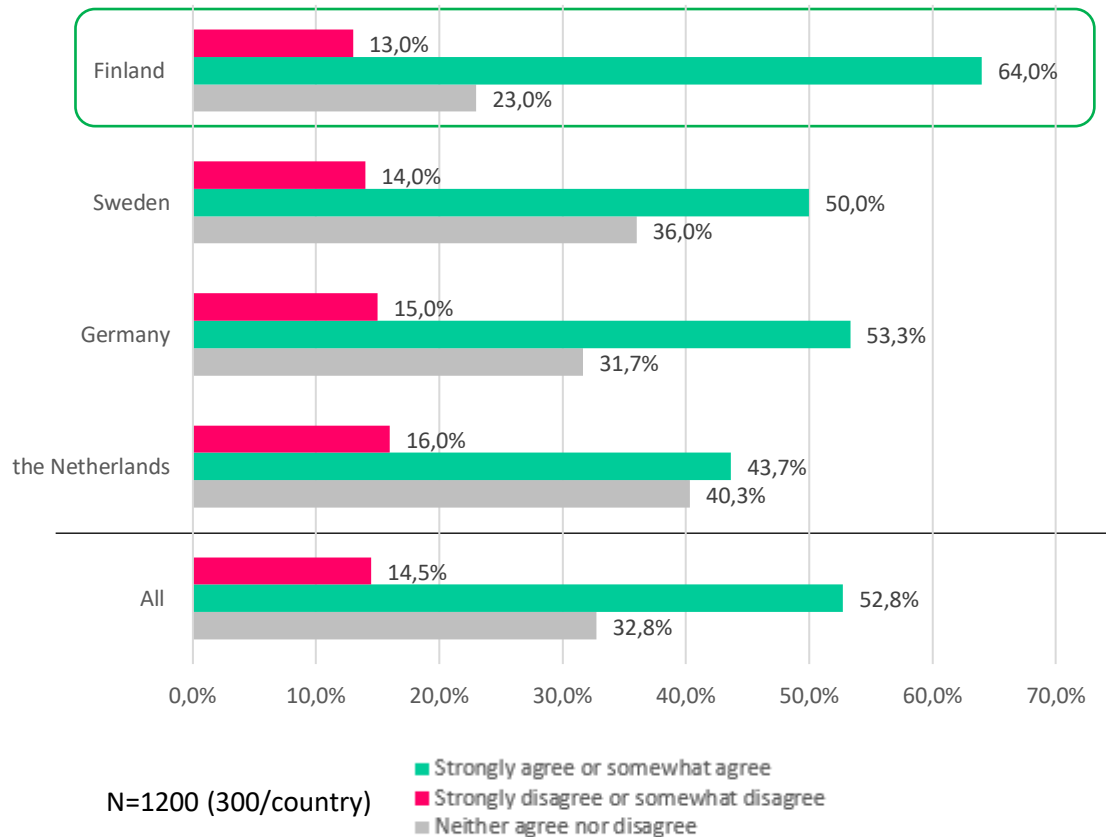
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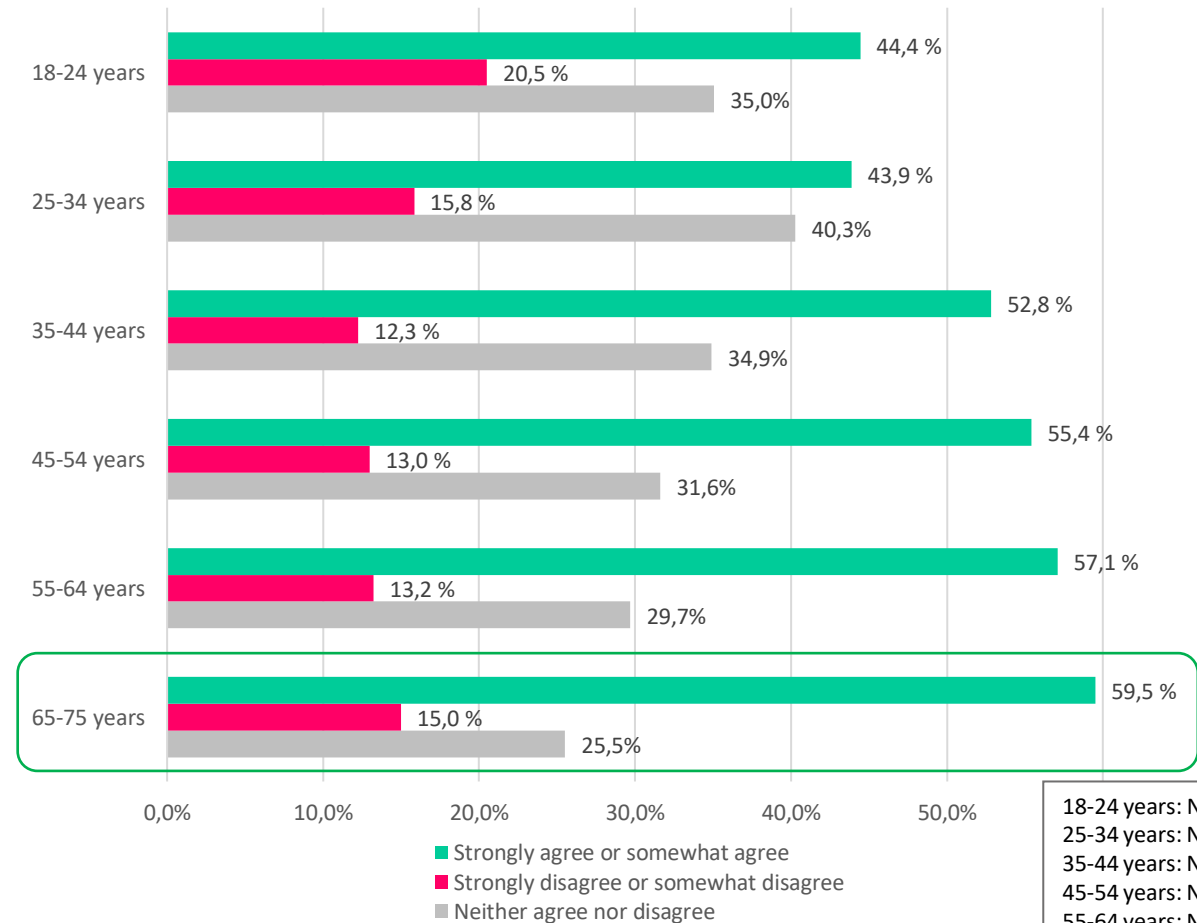
# In my opinion, the recycling of end-of-life textiles generated in households has a significant environmental impact



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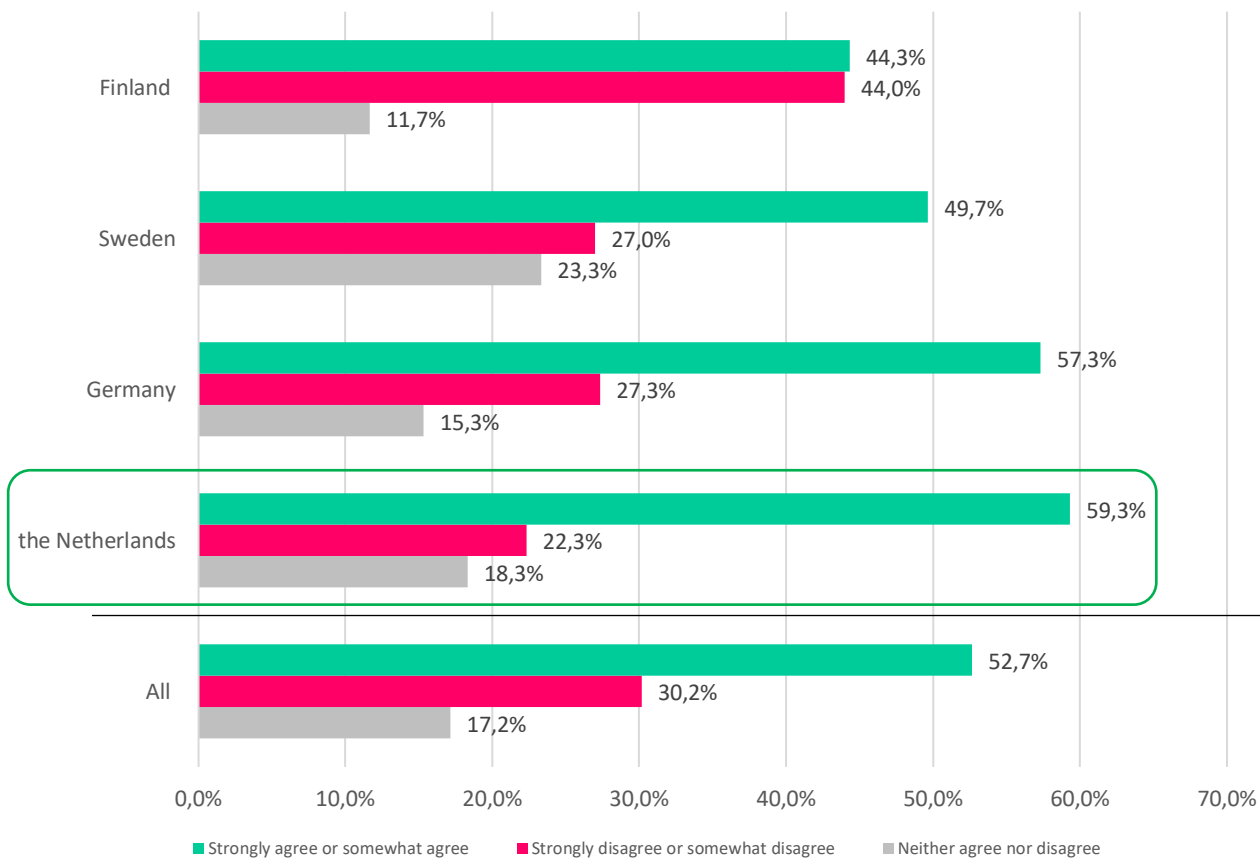


18-24 years: N = 117  
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# I know where I can easily recycle my household end-of-life textiles

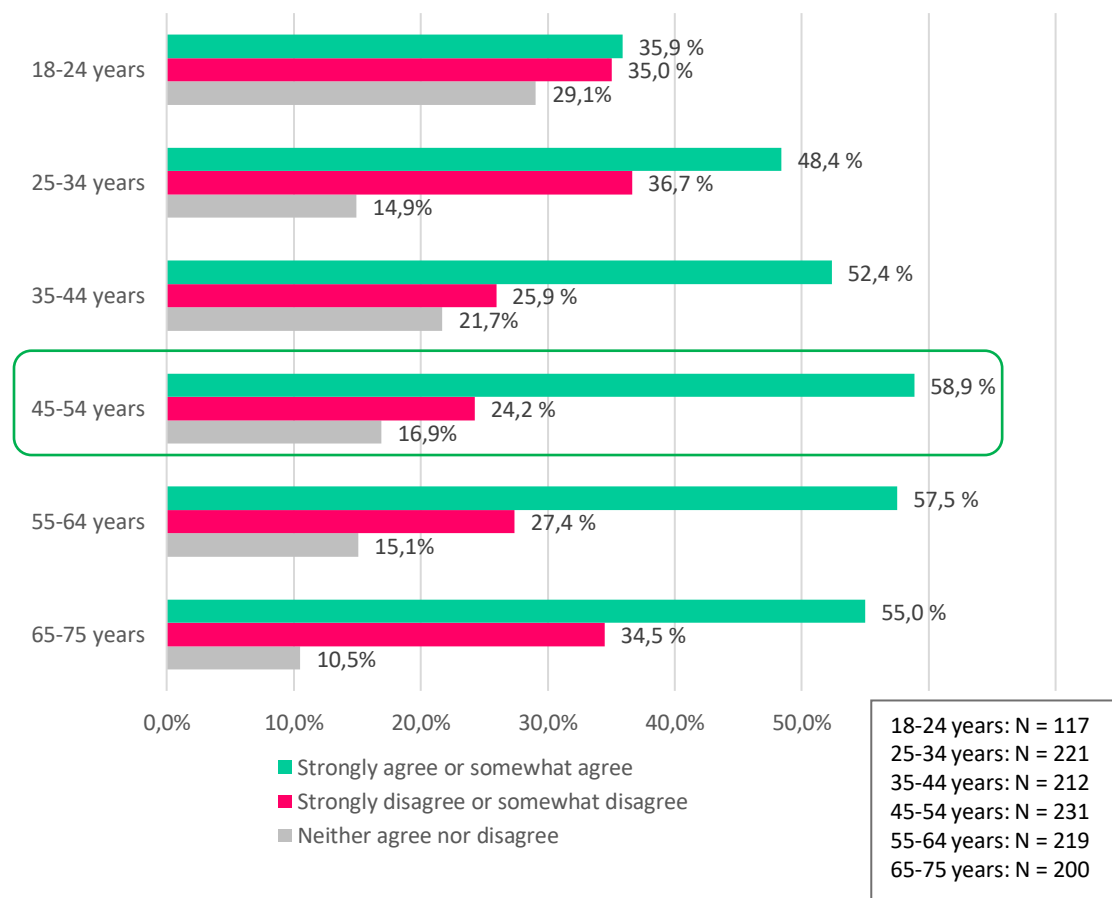


I know where I can easily recycle my household end-of-life textiles



N=1200 (300/country)

I know where I can easily recycle my household end-of-life textiles

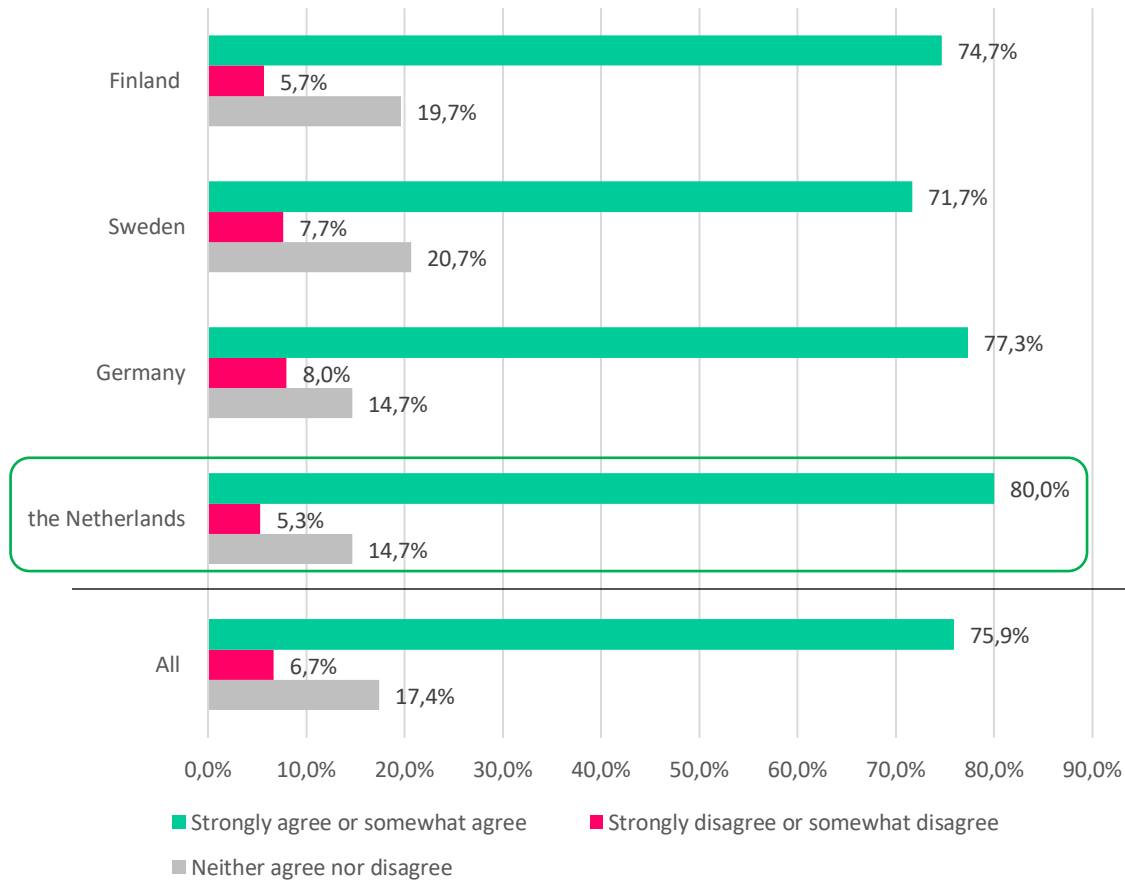


■ Strongly agree or somewhat agree  
■ Strongly disagree or somewhat disagree  
■ Neither agree nor disagree

# I am willing to take the end-of-life textiles generated in my household to separate textile collection points

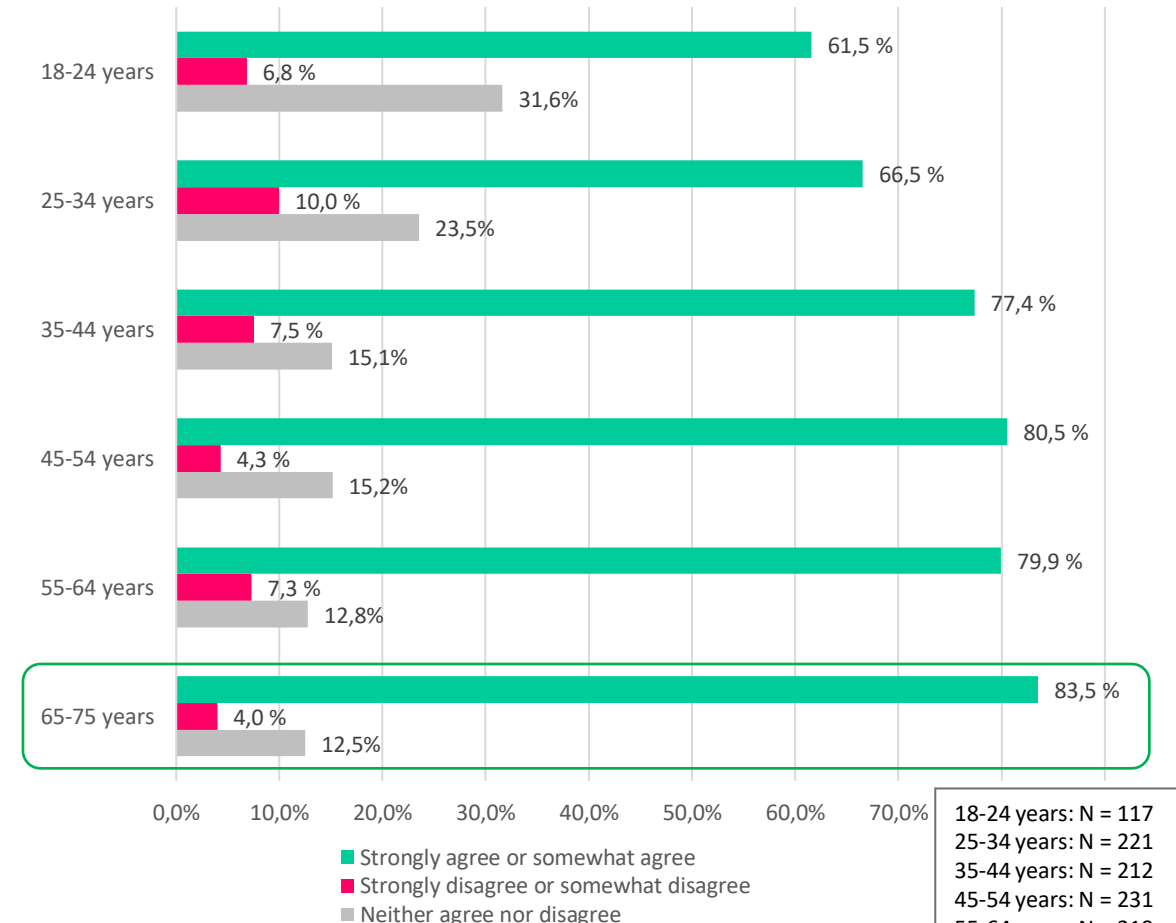


I am willing to take the end-of-life textiles generated in my household to separate textile collection points



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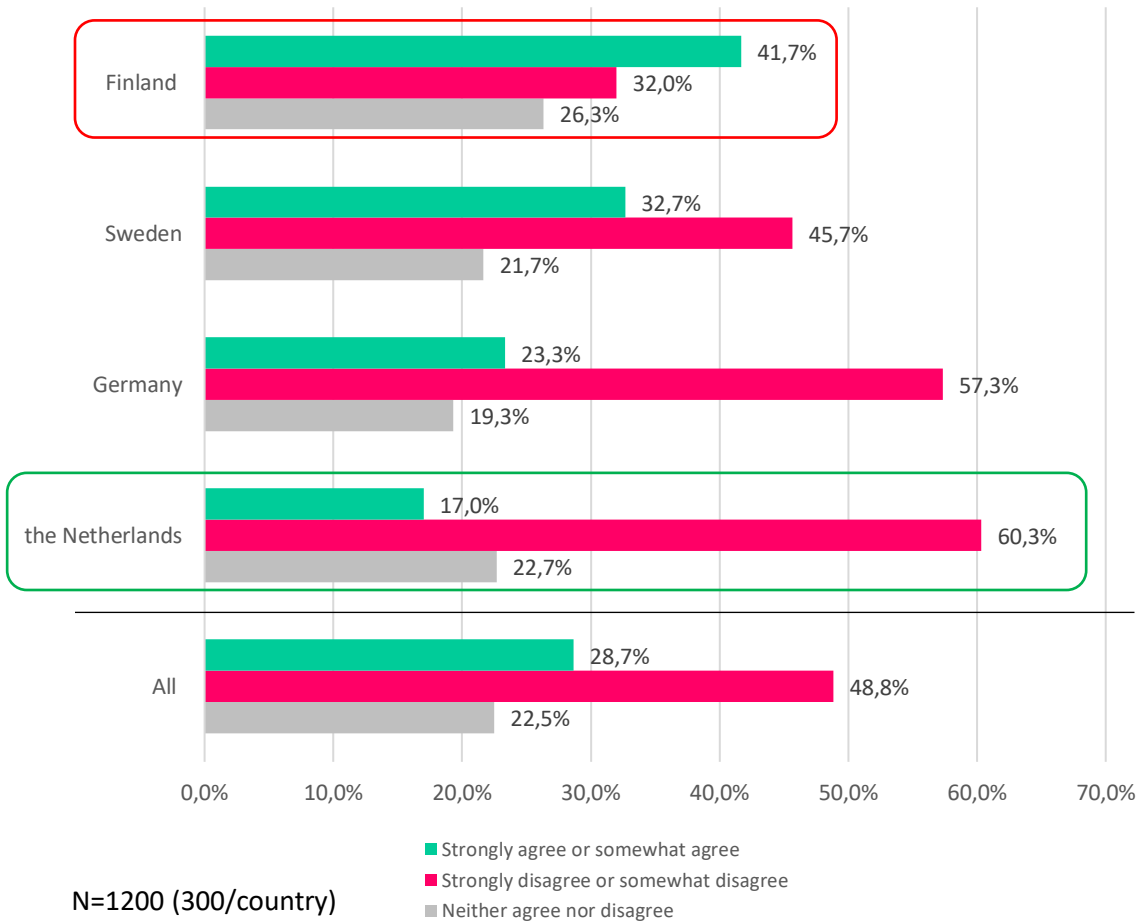


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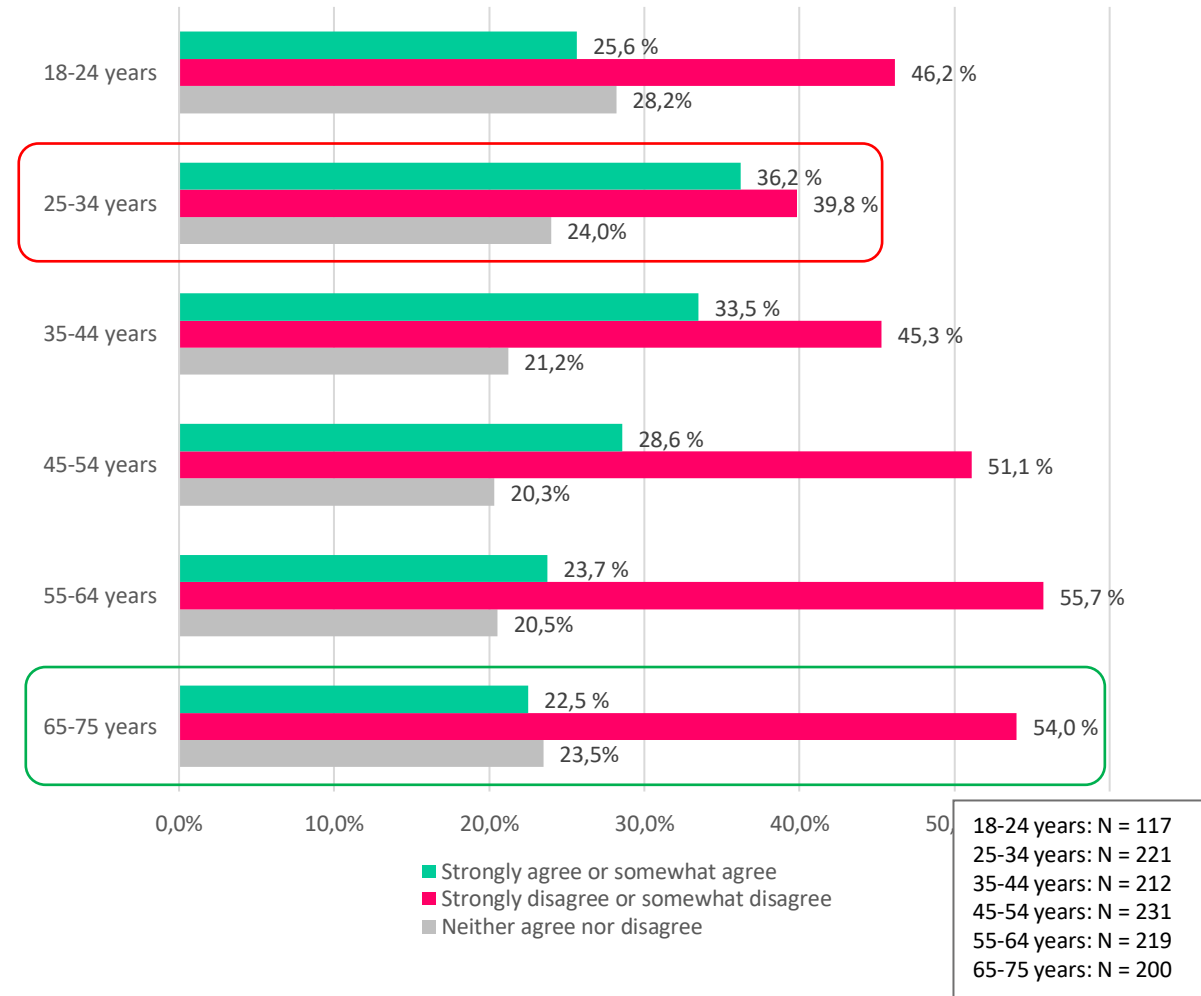
# I often put broken garments in the mixed/energy waste bin



I often put broken garments in the mixed/energy waste bin



I often put broken garments in the mixed/energy waste bin



# Conclusions

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- Garments containing recycled material are found interesting, particularly in age group 18-24
- There is also interest in purchasing such garments, particularly in Finland (55%), and in the age group 18-24
- The Finnish respondents reported to have purchased such products the most, and also the age group 18-24
- No significant worry about the quality or purity of such garments
- Most respondents believed that recycling of end-of-life textiles generated in households has a significant environmental impact
- Recycling of end-of-life textiles was most clear for Dutch respondents, though all countries reported to high willingness to take end-of-life textiles to recycling points
- The Finnish respondents reported higher tendency in putting broken garments to the mixed/energy waste bin, especially compared to the Dutch and German respondents





**Separate collection of end-of-life textiles**

**– consumer views in Finland**



# Consumer views on separate collection of end-of-life textiles



- From January 1<sup>st</sup> 2023, it has been possible for consumers in Finland to deliver their discarded textile to separate collection points (*following the EU waste legislation obligating the establishment of separate collection of textile waste by 1 January 2025, see [EU's Textile Strategy communication](#)*)
- Consumers have been able to take their discarded textiles to a collection point at their municipality free of charge
- The textiles are then delivered to Paimio for further sorting, where material suitable for mechanical recycling is collected
- As part of the Telavalue project, 300 consumers from Finland were asked about their knowledge and willingness to take discarded textiles to municipal collection points

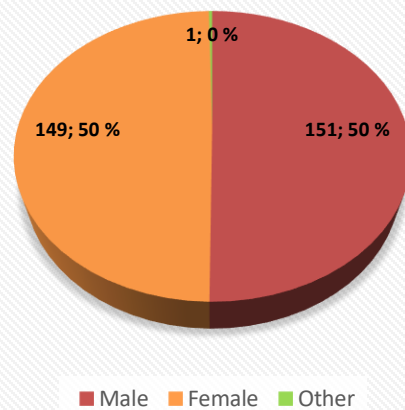


Photos taken by Hannamaija Tuovila (VTT) and Miira Ojanen (LSJH)

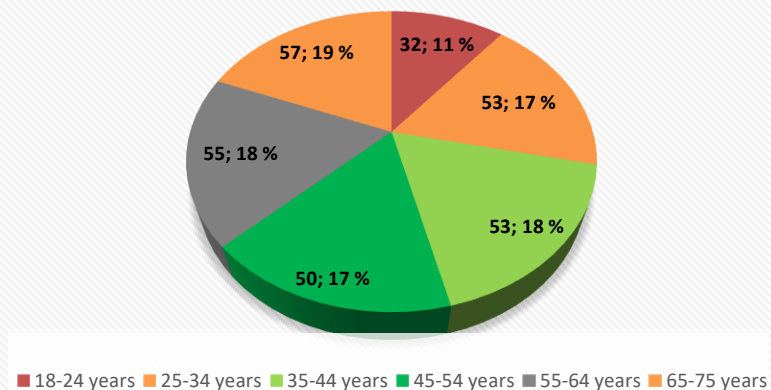


# Respondent profile (N=300)

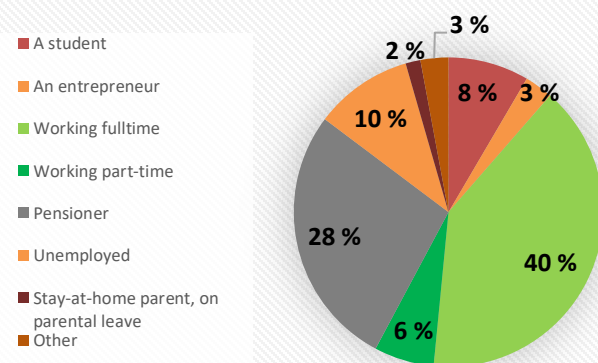
## Gender division



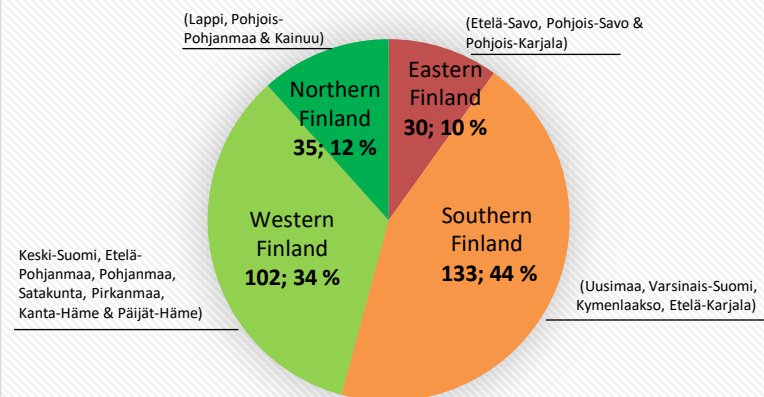
## Age groups



## Occupation



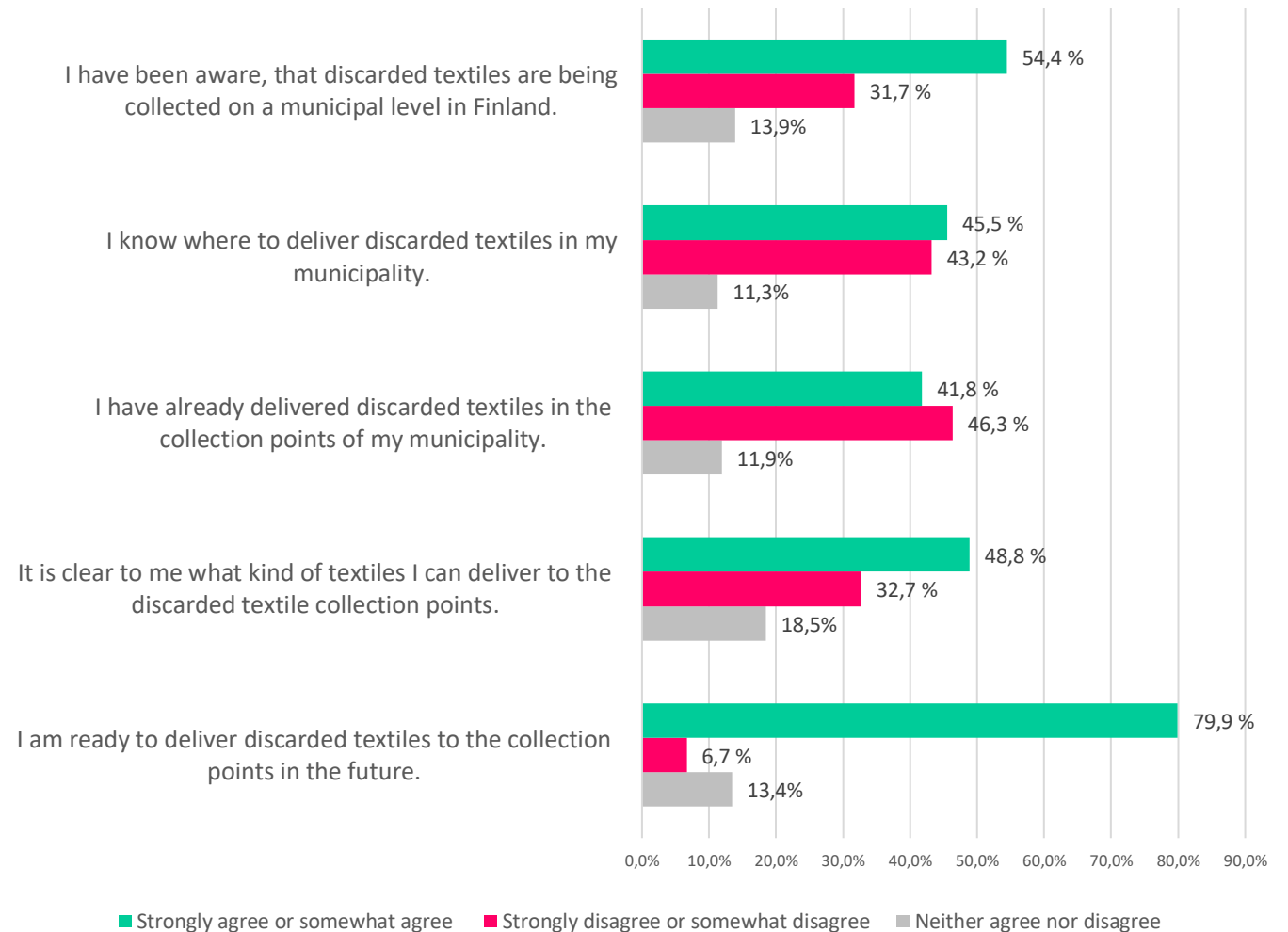
## Area of living



# Consumer views on separate collection of discarded textiles



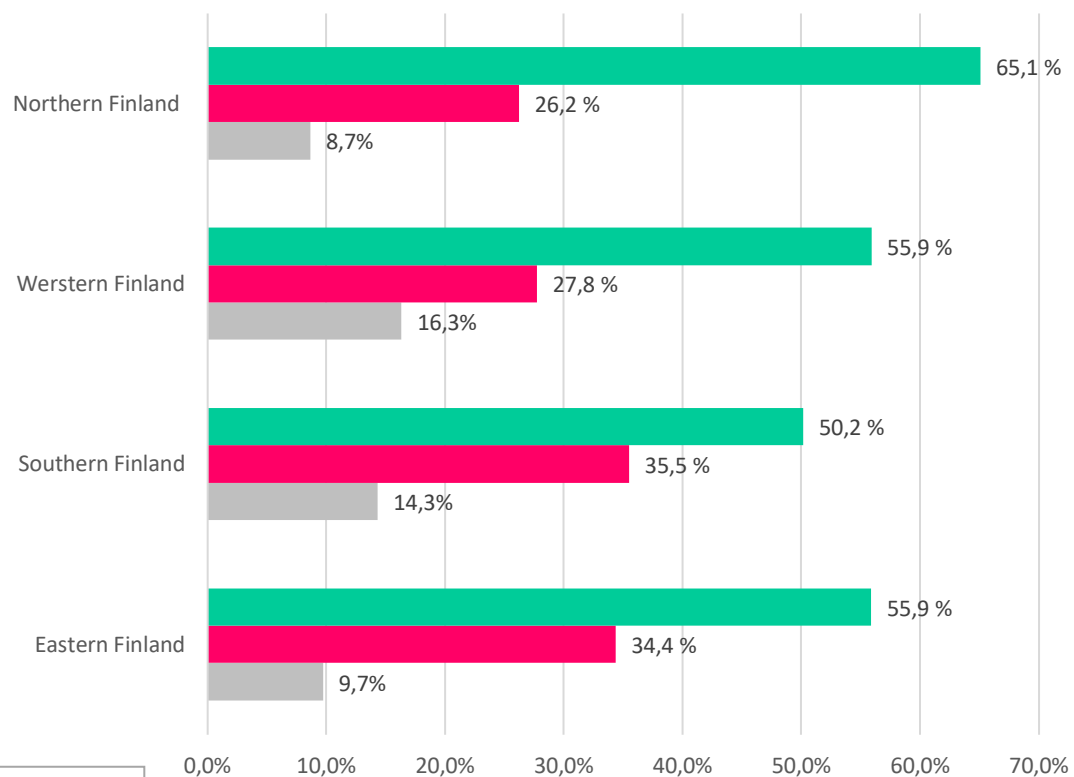
- Most respondents (54%) had been aware that discarded textiles are collected in Finland, though 31,7% reported to disagree with the statement (combined strongly disagree and somewhat disagree)
- 45,5% reported that they knew where to deliver discarded textiles, while 43,2% reported not to
- 46,3% disagreed to having already delivered textiles, while 41,8% reported to having already delivered discarded textiles to collection points
- For most respondents (48,8%) it is clear what kind of textiles I can deliver to collection points. For 32,7% it is unclear, and 18,5% were neutral
- The vast majority of respondents (79,9%) reported being ready to deliver discarded textiles to the collection points in the future





# I have been aware, that discarded textiles are being collected on a municipal level in Finland

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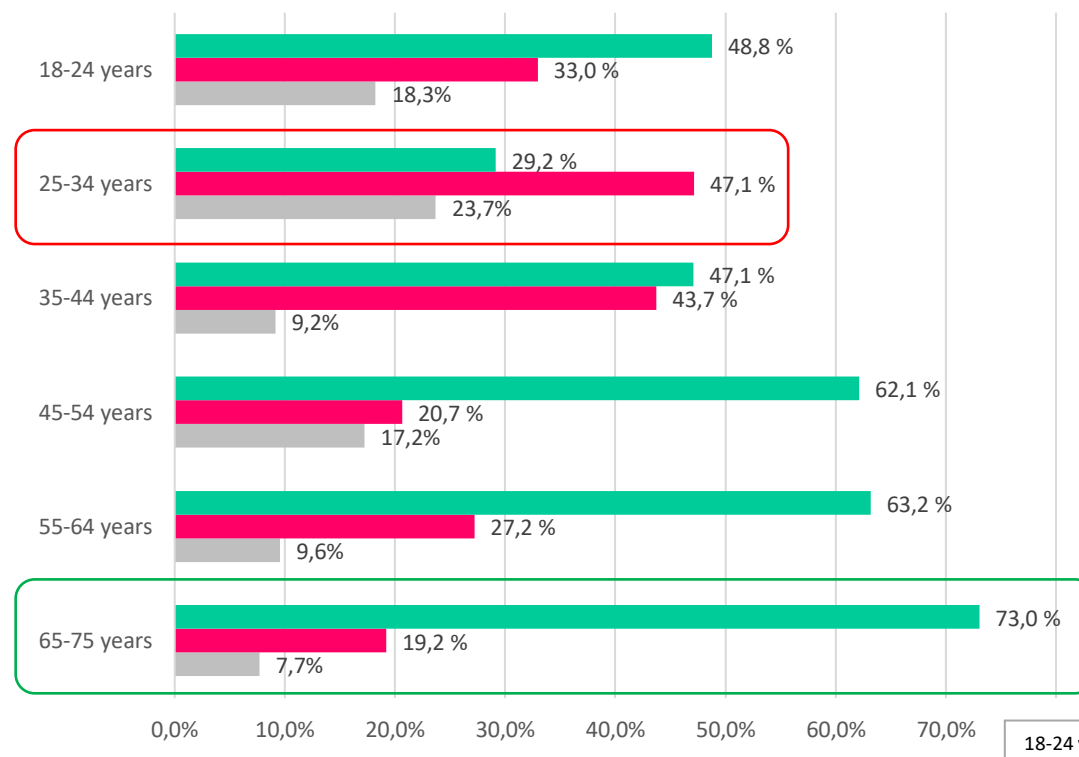


Northern Finland: N = 35  
Western Finland: N = 102  
Southern Finland: N = 133  
Eastern Finland: N = 30

Total: N = 300

Strongly agree or somewhat agree  
Strongly disagree or somewhat agree  
Neither agree nor disagree

I have been aware, that discarded textiles are being collected on a municipal level in Finland.



18-24 years: N = 32  
25-34 years: N = 53  
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45-54 years: N = 50  
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65-75 years: N = 57

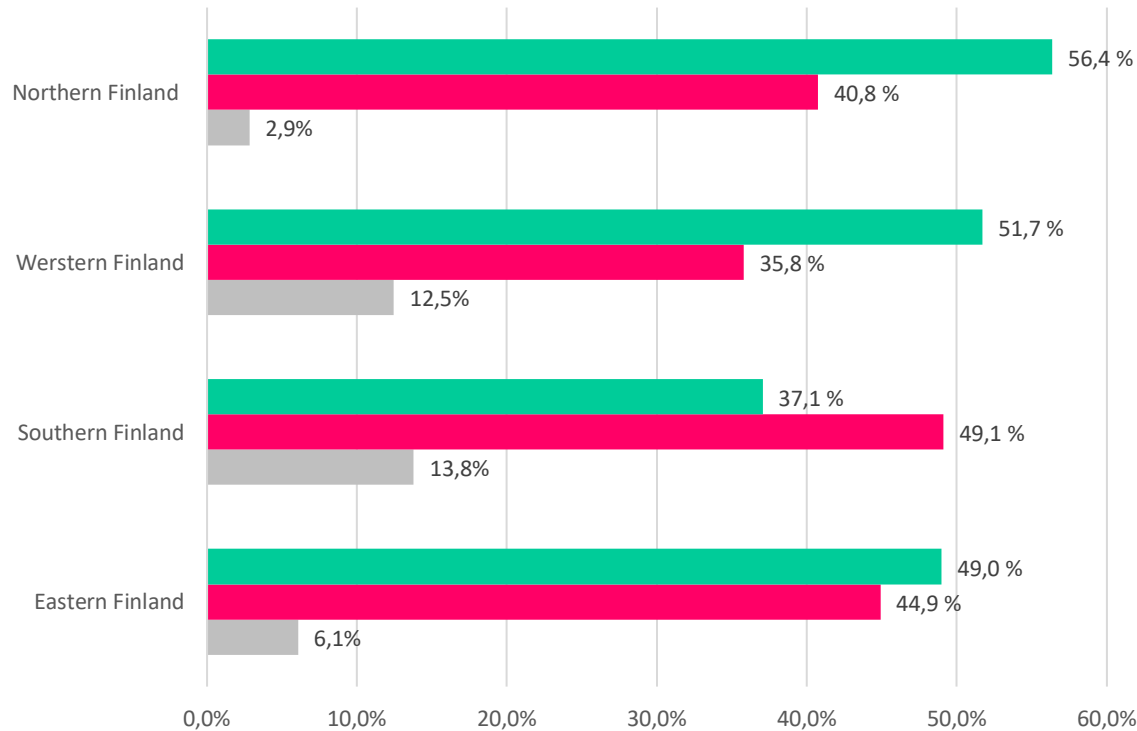
Total: N=300

Strongly agree or somewhat agree  
Strongly disagree or somewhat agree  
Neither agree nor disagree

# I know where to deliver discarded textiles in my municipality



I know where to deliver discarded textiles in my municipality.

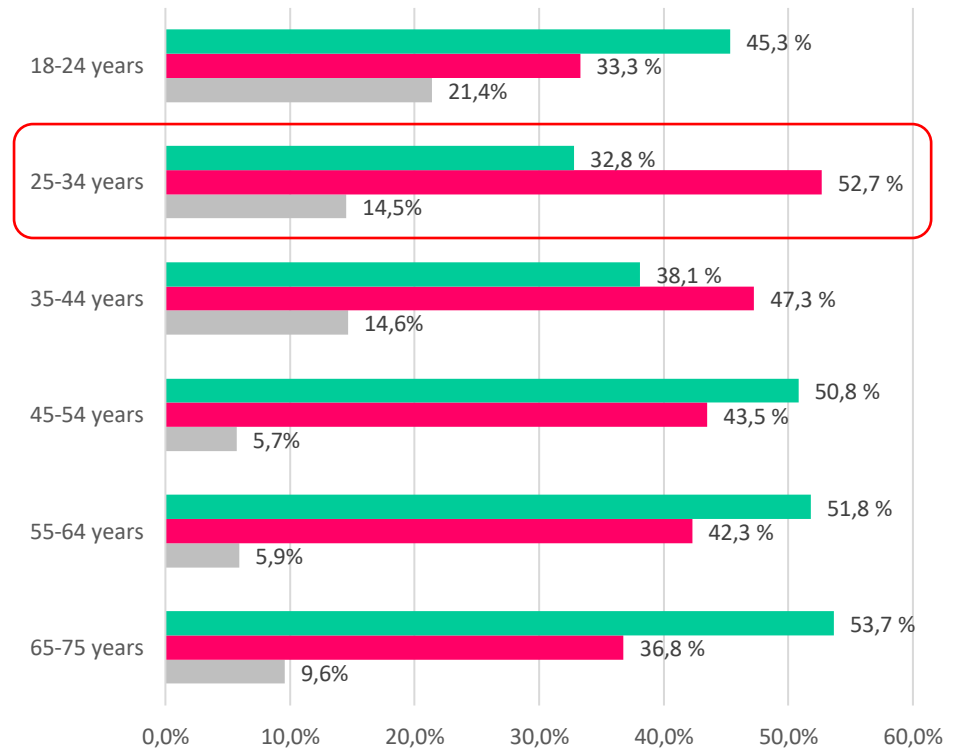


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Total: N=300

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# I have already delivered discarded textiles in the collection points of my municipality

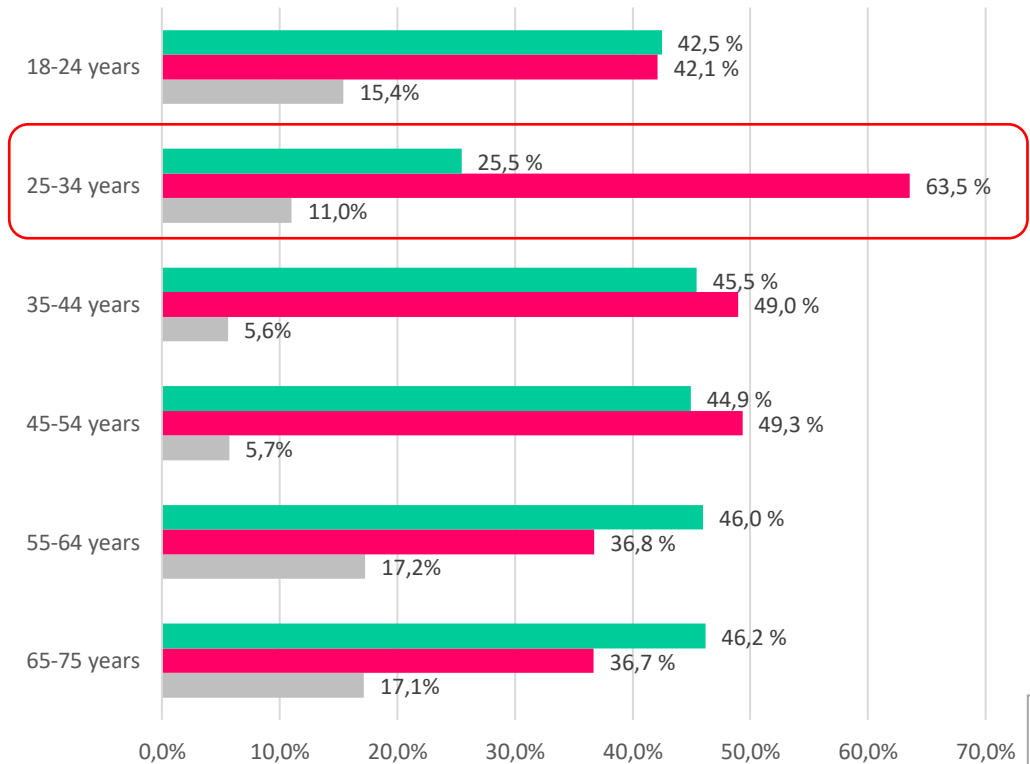


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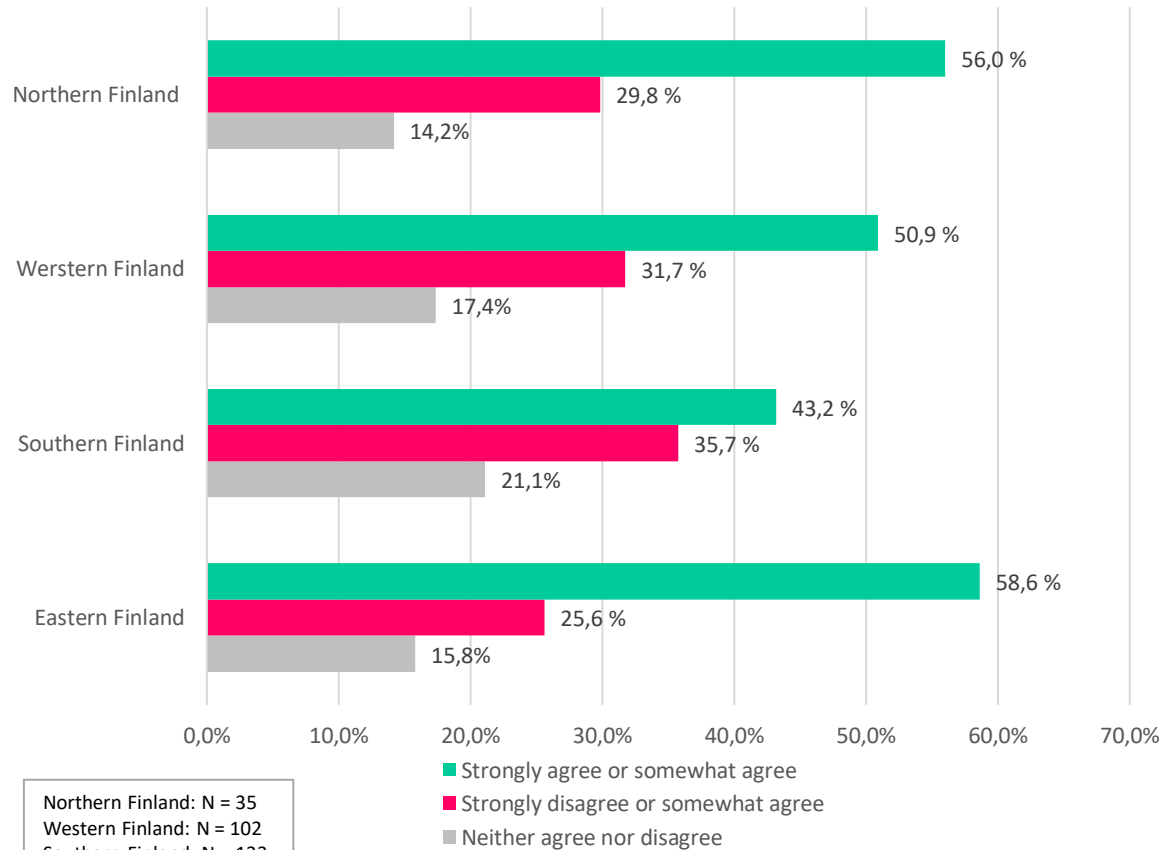
Strongly agree or somewhat agree  
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 Neither agree nor disagree

Strongly agree or somewhat agree  
 Strongly disagree or somewhat agree  
 Neither agree nor disagree

# It is clear to me what kind of textiles I can deliver to the discarded textile collection points



It is clear to me what kind of textiles I can deliver to the discarded textile collection points.

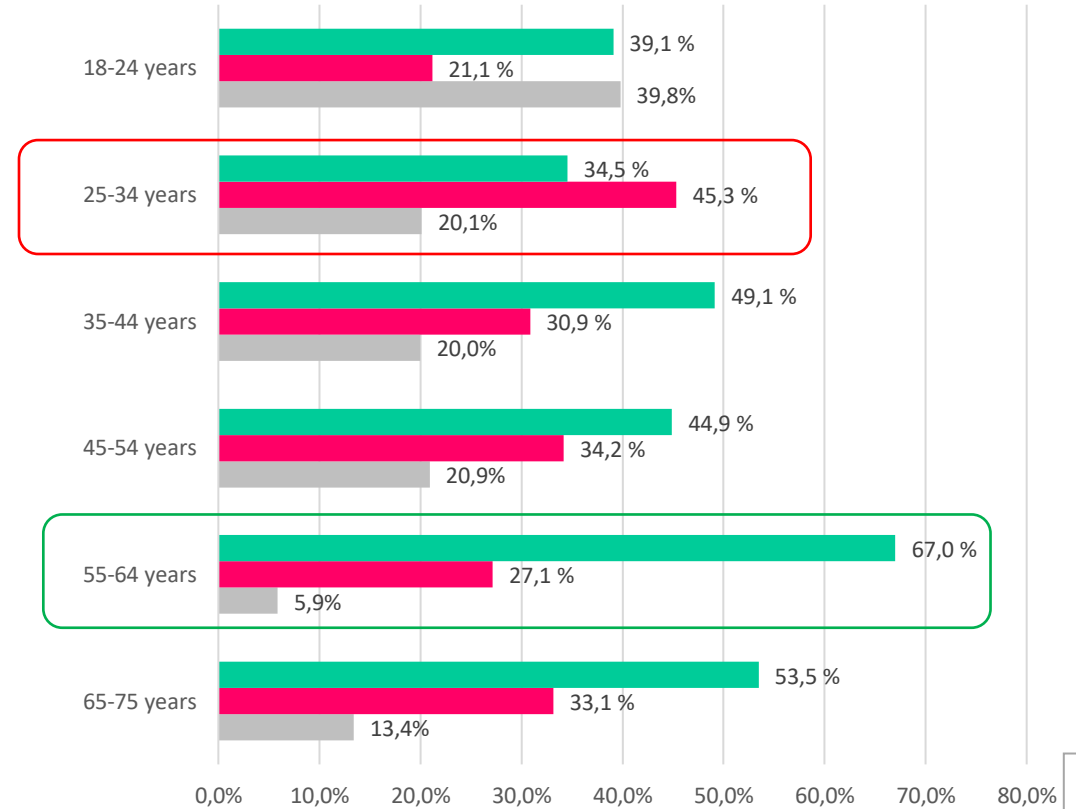


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Total: N=300

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 ■ Strongly disagree or somewhat agree  
 ■ Neither agree nor disagree

# Reasons for not delivering discarded textiles to collection points



- 1) Being unaware of such a collection system exists  
→ 43 responses
  - 2) Poor access to collection points, logistical challenges, not knowing where to find collection points  
→ 40 responses
  - 3) Other purposing, e.g. rags to use in cleaning, donating for reuse (e.g. second hand)  
→ 29 responses
  - 4) No need for it (no textiles to discard)  
→ 26 responses
  - 5) Lack of time, low interest, laziness  
→ 19 responses
- Other reasons included for example wearing out the textiles; not throwing anything away (storing all textiles); textiles in use are made of polyester (not suitable for recycling)

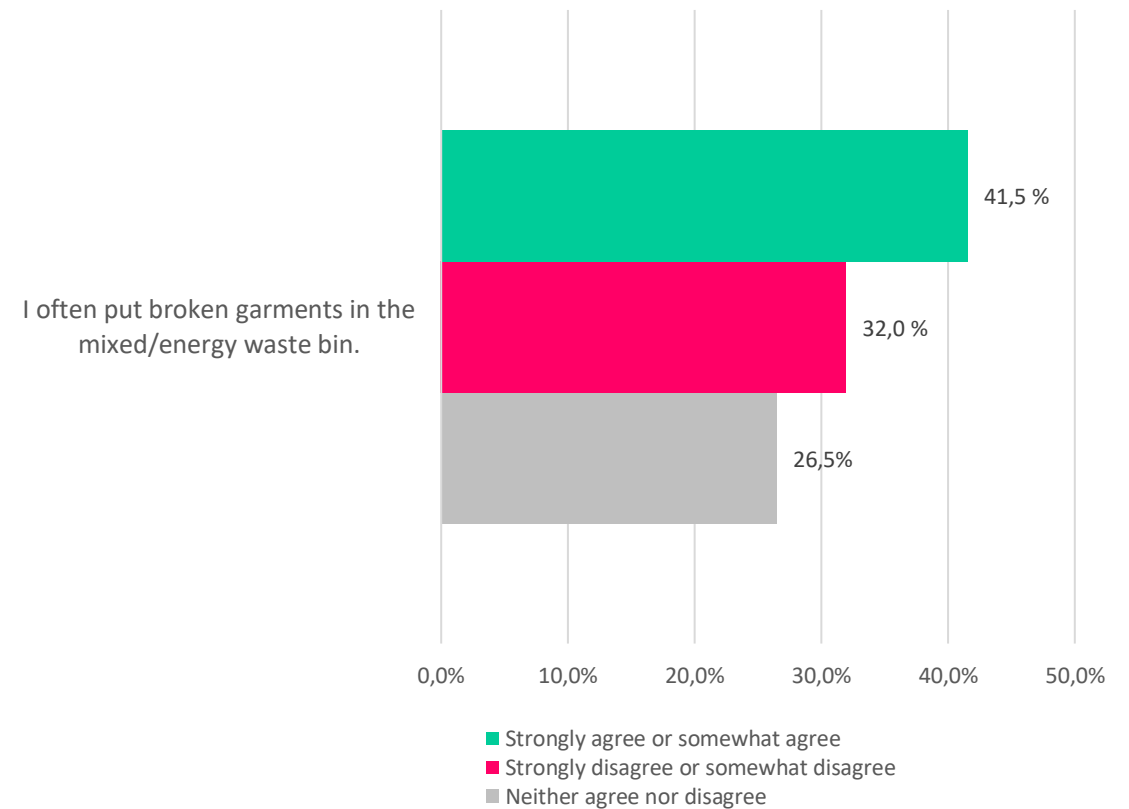






# I often put broken garments in the mixed/energy waste bin

- When asked about the textile disposal habits of the Finnish consumers, the many of the respondents (41,5%) reported that they often put broken garments in the mixed/energy waste bin, while 32% of the respondents disagreed
- Compared to other countries in the survey, Finland had the highest tendency to put broken garments in the mixed/energy waste bin



N = 300

# I often put broken garments in the mixed/energy waste bin

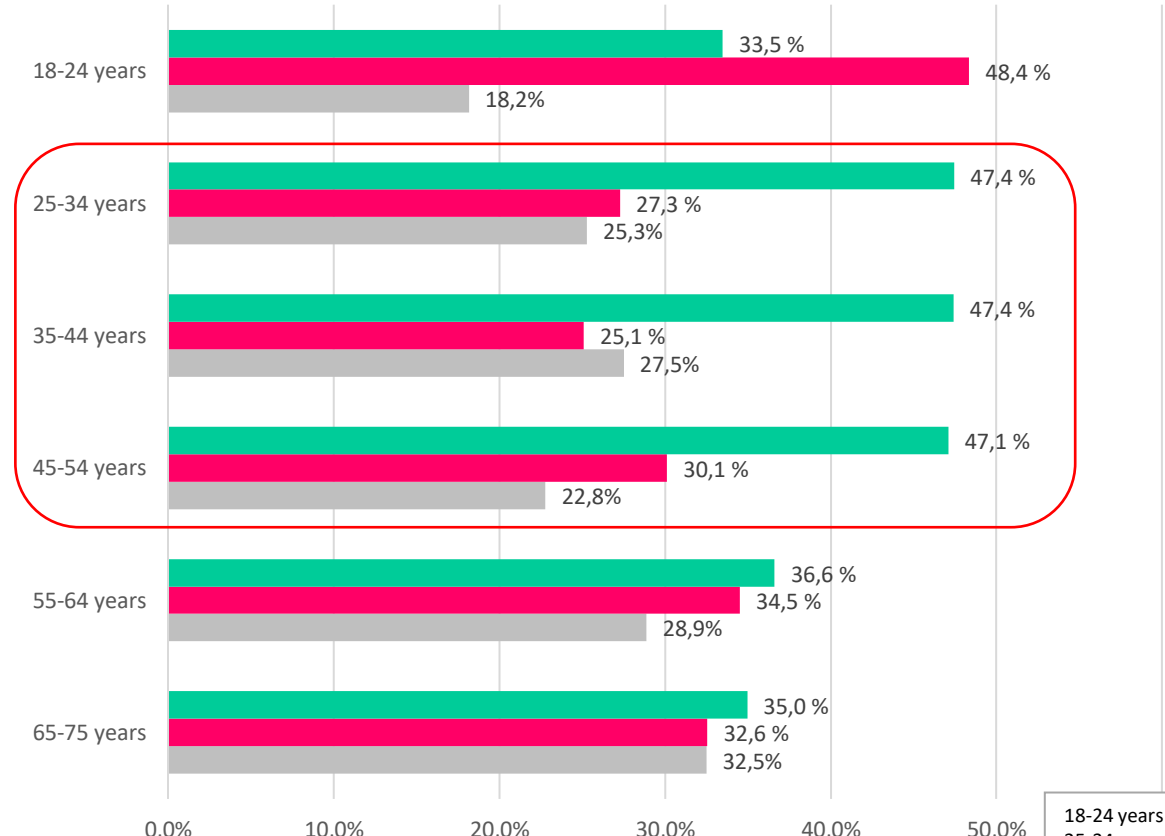


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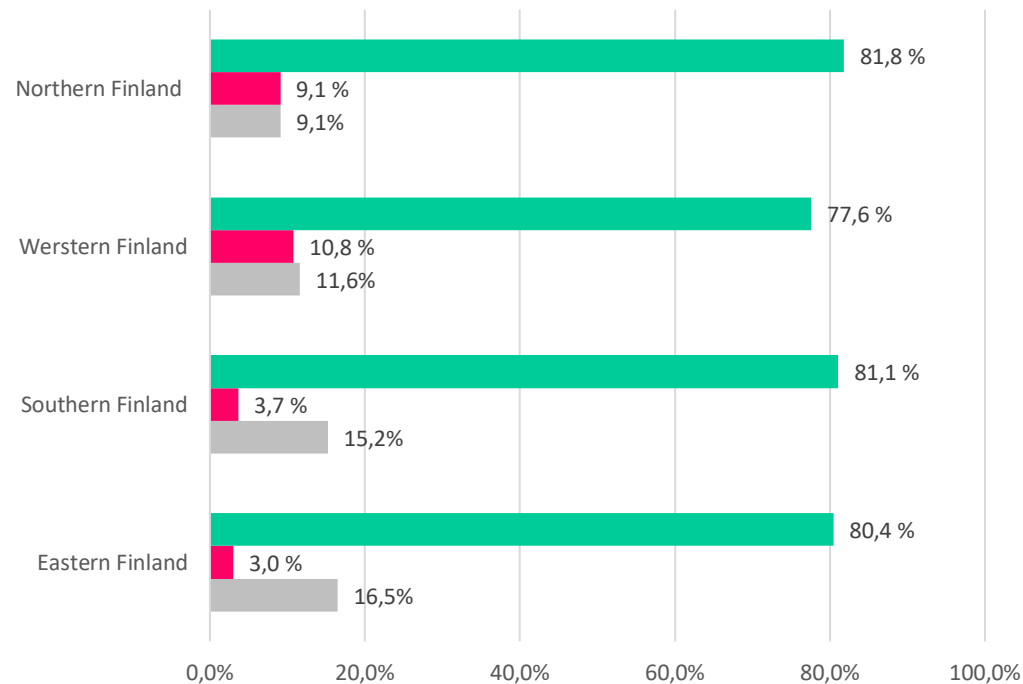


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 Total: N=300

# I am ready to deliver discarded textiles to the collection points in the future



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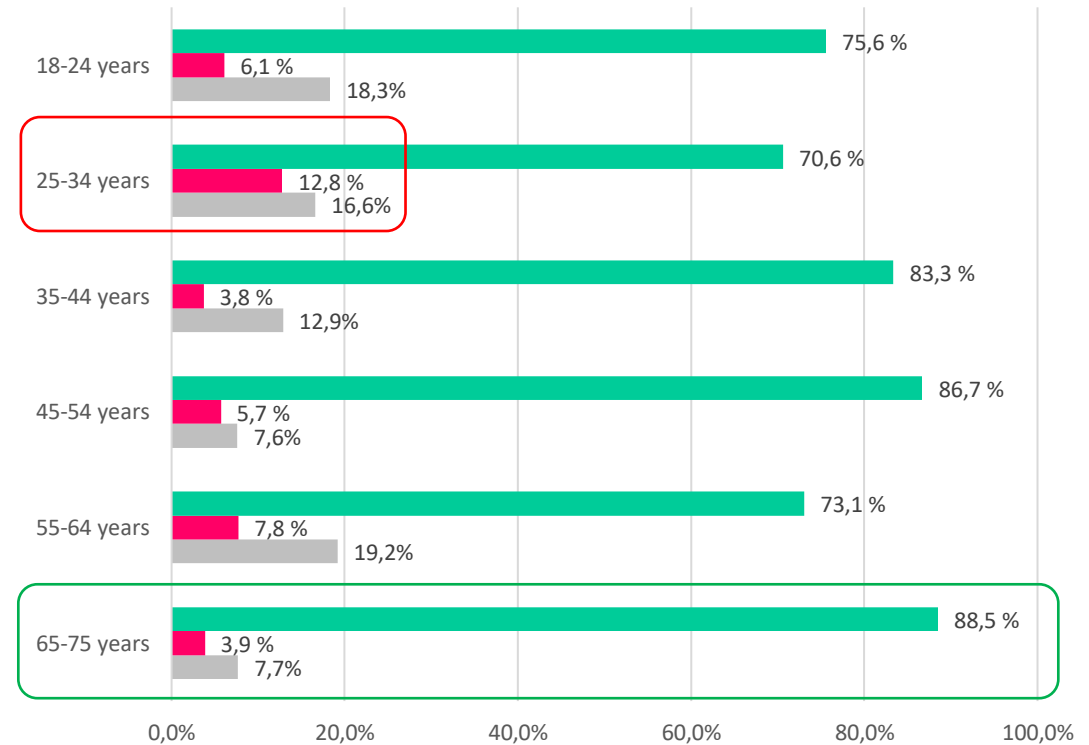


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Strongly agree or somewhat agree  
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 Neither agree nor disagree

18-24 years: N = 32  
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Total: N=300

# Conclusions



- Most respondents had been aware, that there is a separate collection for discarded textiles in Finland. However, a high number of respondents (32%) did indicate that they had not heard of it
  - Lowest awareness of such a collection system was in age group 25-34 and highest awareness among respondents aged 65-75 years
- Knowing where to deliver discarded textiles was divided almost equally, almost half reported to knowing where to deliver them and half of the respondents not
- **Many respondents reported that they had not delivered textiles to the collection points (46%),** though a high number of respondents reported that they had done so already (42%)
  - Lowest number was reported by respondents in the age group 25-34
- Main reasons for not delivering discarded textiles were being unaware that such a collection system exists and poor access to collection points, logistical challenges or not knowing where to find collection points
- When asked about their disposal habits, many respondents (41,5%) indicated that they often put broken garments in the mixed/energy waste bin
  - Highest tendency in Southern Finland and among respondents aged between 25-54 years
- Still, most respondents (80%) reported that they are ready to deliver discarded textiles to the collection points in the future

