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OPEN

# CIRCULAR RETAIL SERVICES IN FASHION

A study into the takeback service and secondhand purchase in Hong Kong - Consumer Finding

2021-2022



Aiming to expand the current Circular Fashion Programme in Hong Kong, in May 2021, Redress commissioned GlobeScan, an independent, insights and advisory consultancy, for a year-long baseline study of circular retail services, particularly for takeback and secondhand offers, in Hong Kong.

This report presented the highlights of the behaviour of **Hong Kong Consumers** for the two prioritised offers, which would inform the key opportunities and challenges for local circular retails services.

Remarks:

- Note that due to confidentiality, this report does not present the finding of the retailers' perceptions and attitudes towards clothing donation and secondhand purchase.

## METHODOLOGY



Online Survey

(Hong Kong general population aged 16+,  $n=1,007$ )

# CONSUMER INSIGHTS ON SECONDHAND SERVICE

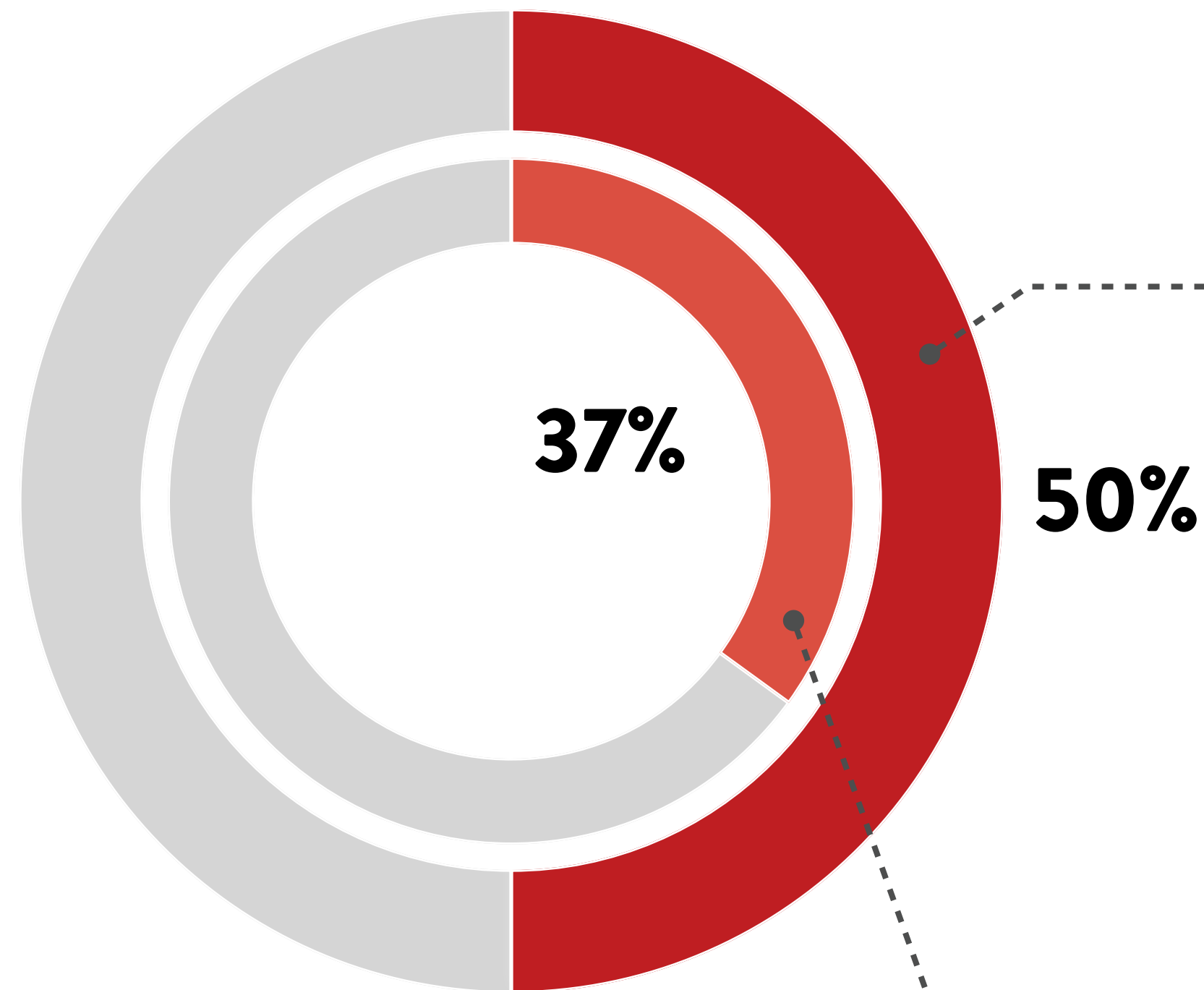
Greenhouse gas emissions from textiles production totalled 1.2 billion tonnes of CO2 equivalent, more than those of all international flights and maritime shipping combined.

Source: Ellen MacArthur Foundation (2017), A New Textiles Economy: Redesigning Fashion's Future



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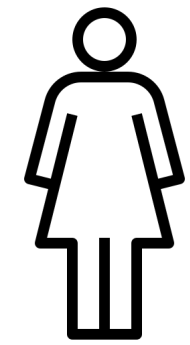
## PAST EXPERIENCE IN PURCHASING SECONDHAND CLOTHING



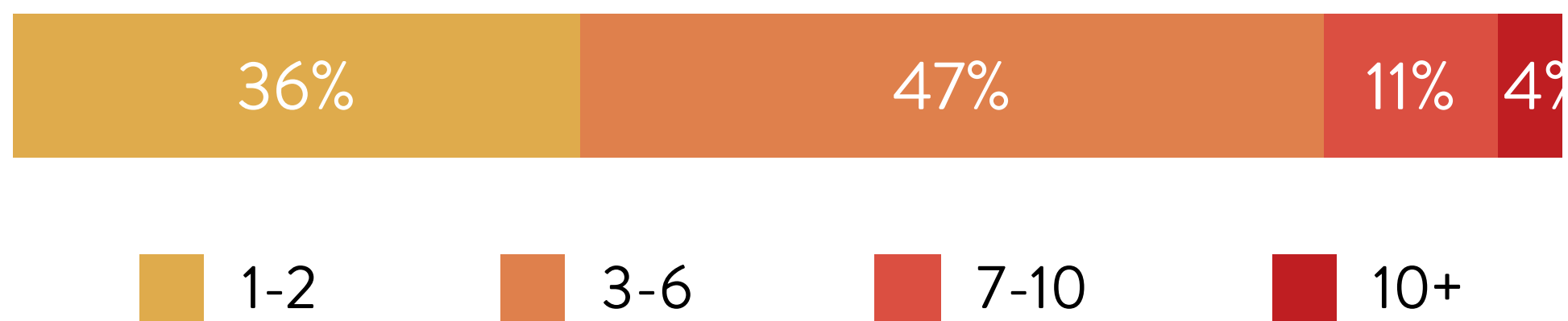
- Ever bought secondhand clothing
- Bought secondhand clothing past 12 months

### Groups where secondhand clothing purchase is more popular

- Female (54%)
- Young people (16-24 years old) (61%)
- People with low education (72%)



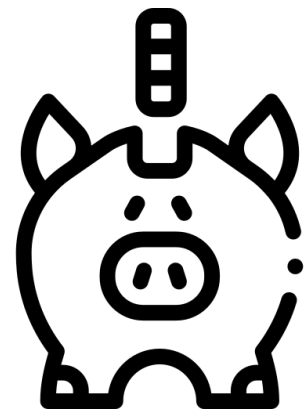
### Number of times consumers purchase secondhand clothing in the past 12 months



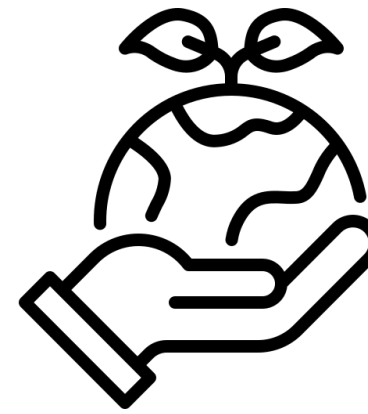
# TOP THREE REASONS WHY CONSUMERS PURCHASE SECONDHAND CLOTHING

(AMONG THOSE WHO HAVE EVER BOUGHT)

**It's cheaper**  
(56%)



**It's environmentally friendly/ethical**  
(51%)



**More unique/individual styles**  
(40%)



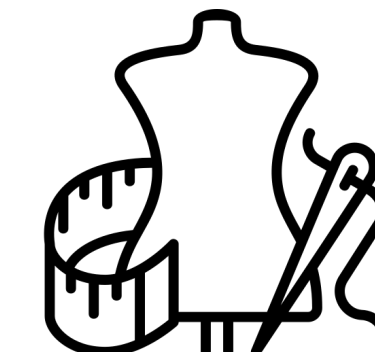
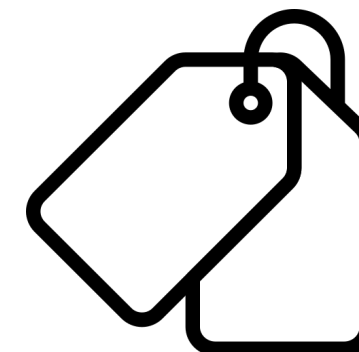
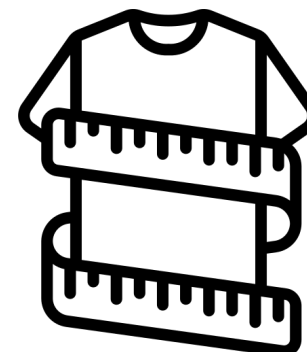
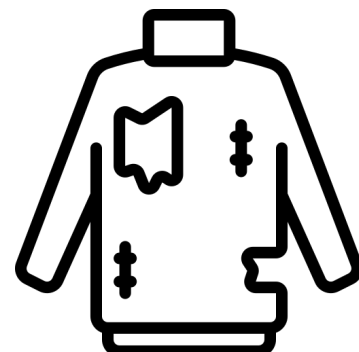
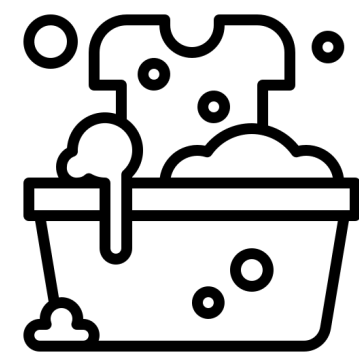
## OTHER REASONS

- It is fashionable to shop secondhand (28%)
- My family and friends shopped secondhand (25%)
- Celebrities or influencers I follow on shopped secondhand (21%)
- It was for a unique occasion / event (18%)

## TOP FACTORS OF BUYING SECONDHAND CLOTHING

### Main preventing factors

- Potential hygiene-related issues (54%)
- Hidden flaws or damages (40%)
- Looks old and worn (34%)
- Difficult to find my size (26%)
- Less variety of styles (23%)

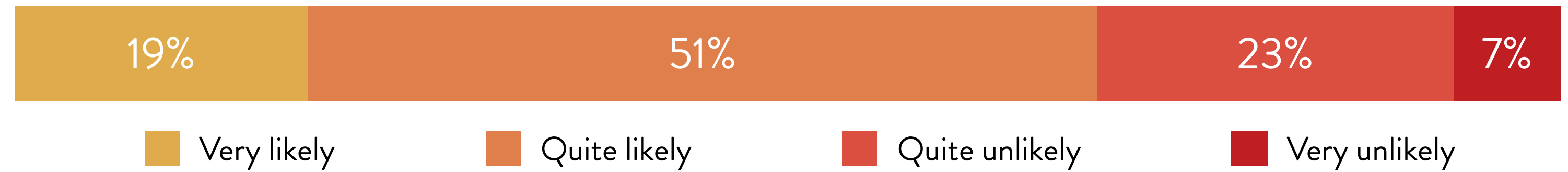


### Main encouraging factors

- Clothing was cleaned/sanitised (48%)
- I can be sure the clothing is not fake (27%)
- More variety of styles (25%)
- I know the original “new” price of the clothing (24%)
- Most favourite brands were sold in secondhand shops (23%)

# PERCEPTIONS OF RETAIL BRANDS OFFERING SECONDHAND CLOTHING

Likelihood of consumers to purchase secondhand clothing in the future



Likelihood of consumers to purchase secondhand clothing at brands' usual retail stores



Perceptions on brands offering secondhand clothing at their usual retail stores



# CONSUMER INSIGHTS ON TAKEBACK SERVICE



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# ACTIONS CONSUMERS TAKE WHEN DECIDING WHAT TO DO WITH UNWANTED CLOTHING

(BY FREQUENCY)



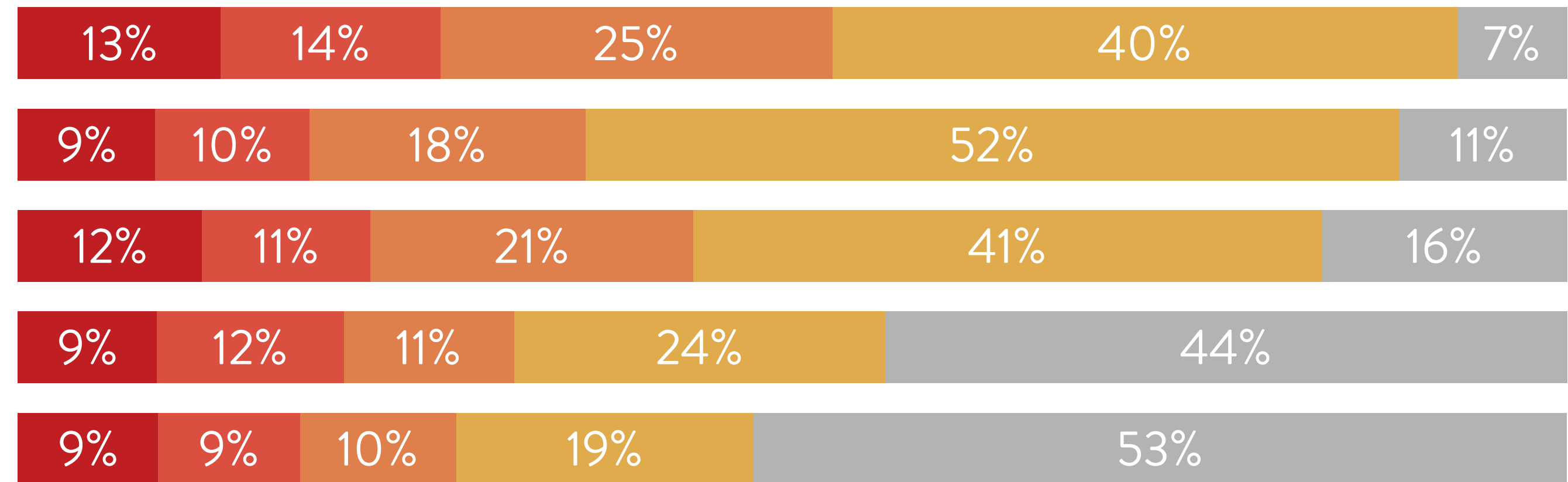
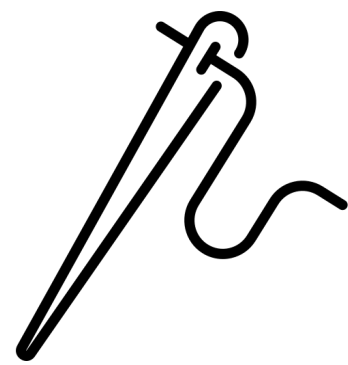
Drop into a clothing collection bin

Throw in the garbage

Pass down to people I know

Redesign/upcycle into a new clothing style

Host a clothing swap with friends

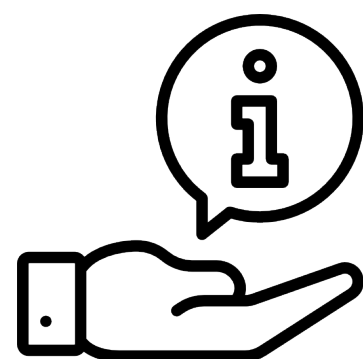
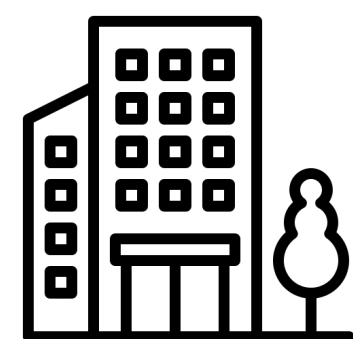


- Once a month or more than once a month
- Once every 2 months
- Once every 6 months
- Once a year or less than once a year
- I never do this

## TOP FACTORS OF GIVING OUT UNWANTED CLOTHING TO CHARITIES

### Main preventing factors

- It's inconvenient to take my clothing there (54%)
- I can't find the clothing collection points (50%)
- I don't know which organisation to donate to (47%)
- I don't know what is suitable for donation (45%)
- I would rather give it to someone I know (37%)



### Main encouraging factors

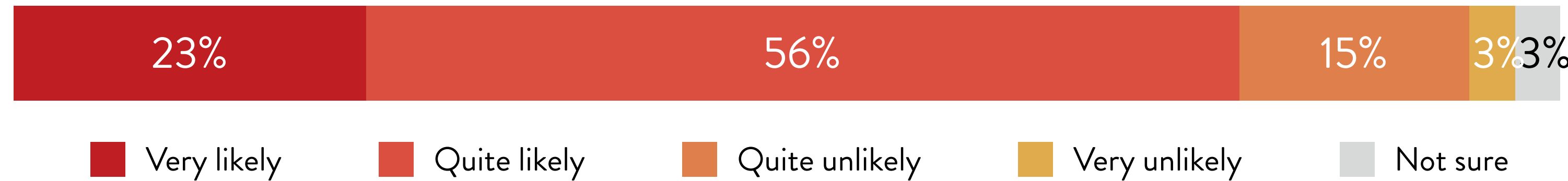
- A drop off point at my place of residence (47%)
- There was a reward (39%)
- I knew where my secondhand clothing would end up (32%)
- A pick-up service/ option (32%)
- A drop off point at shops I usually visit (28%)

# PERCEPTIONS OF RETAIL BRANDS OFFERING CLOTHING TAKEBACK SERVICE

Likelihood of consumers to donate unwanted clothing in the future



Likelihood of consumers to use clothing takeback services in retail stores



Consumer perceptions on brands offering clothing takeback services



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