

Research on

# Clothing Consumption Habits in Hong Kong

September 2020



REDRESS



EDELMAN  
INTELLIGENCE



Edelman

# Background and Methodology

## About the Project

This primary research study is conducted for Redress in order to assess Hong Kong public's perception on clothing consumption, with an added lens on how COVID-19 has impacted habits. The key areas explored include the following:

- Clothing Purchasing Behaviour
- Clothing Using Habits
- Clothing Disposing Practices



## Credit



A boutique research agency with a global team, deeply interconnected for agility and client-centricity. Comprised of 250 analysts, consultants, data scientists, and storytellers with skillsets and expertise cut across every type of research and industry.

EI is an independent organisation as well as a member of the Edelman family – the world's largest communications marketing firm.

## Methodology

10-minute, self-administered survey in Traditional Chinese through an online consumer panel



## Fieldwork Date

August 28, 2020 to September 1, 2020



## Definition of "Clothing"

- In this research, "Clothing" is defined as items such as shirts, blouses, pants, shorts, dresses, and other worn items **except** for innerwear (e.g. underwear), shoes, or clothing accessories (e.g. hats, necktie, belts, scarves, brooch, etc.).



## Target Audience

- Hong Kong respondents
- General Population
- 18-64 years old
- Good mix of age group and gender



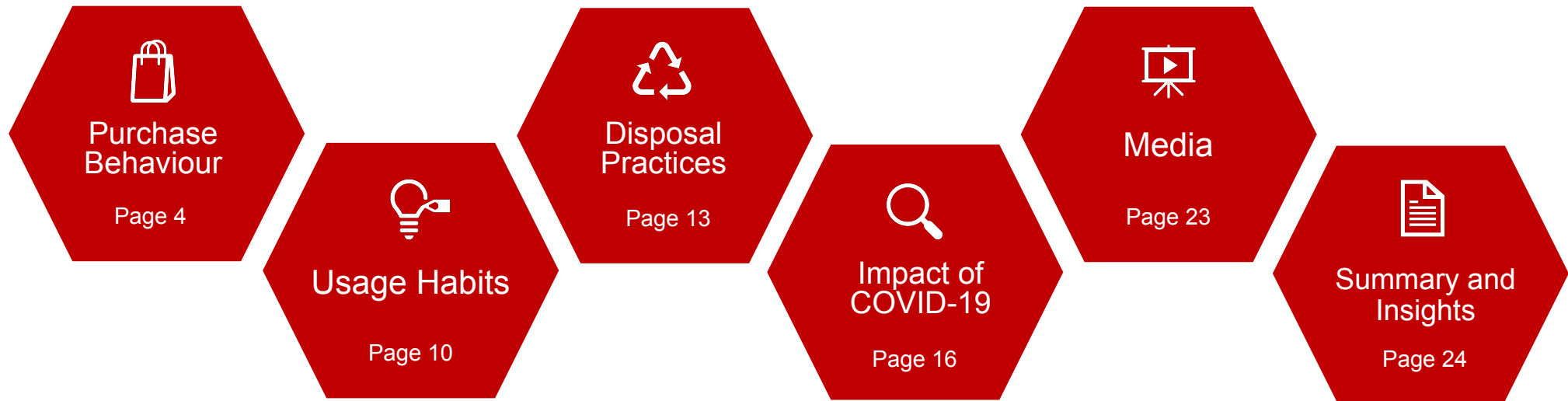
## Sample Breakdown

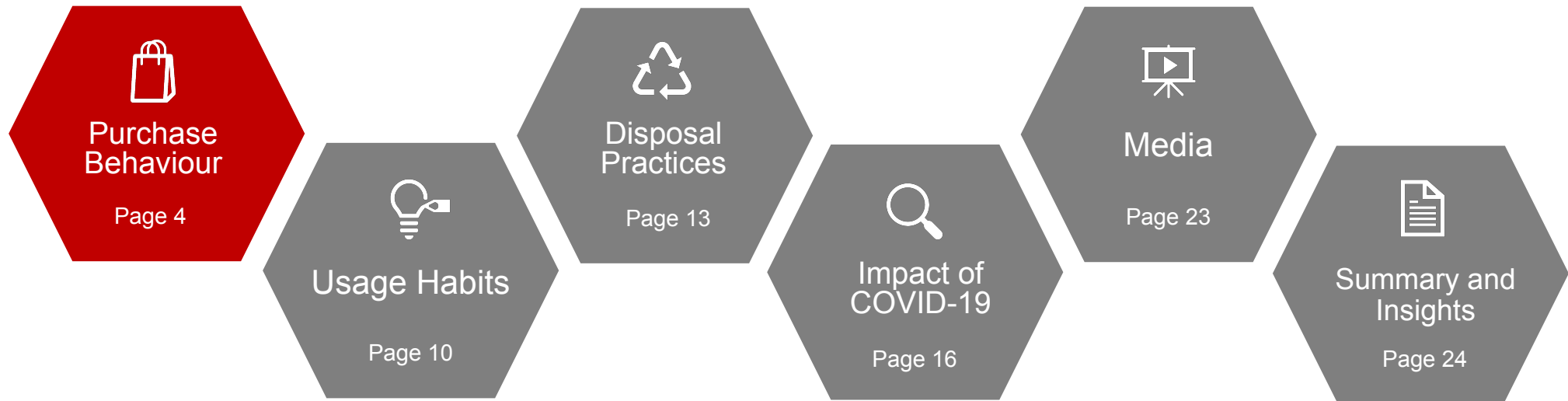
Sample size: n=1,000

Age Group	Male	Female
18-24	6%	6%
25-34	9%	11%
35-44	9%	14%
45-54	9%	13%
55-64	11%	12%
Monthly Household Income	Total	
Below HKD 30,000	52%	
HKD 30,000 – HKD 69,999	27%	
HKD 70,000 and above	21%	

# Content Flow

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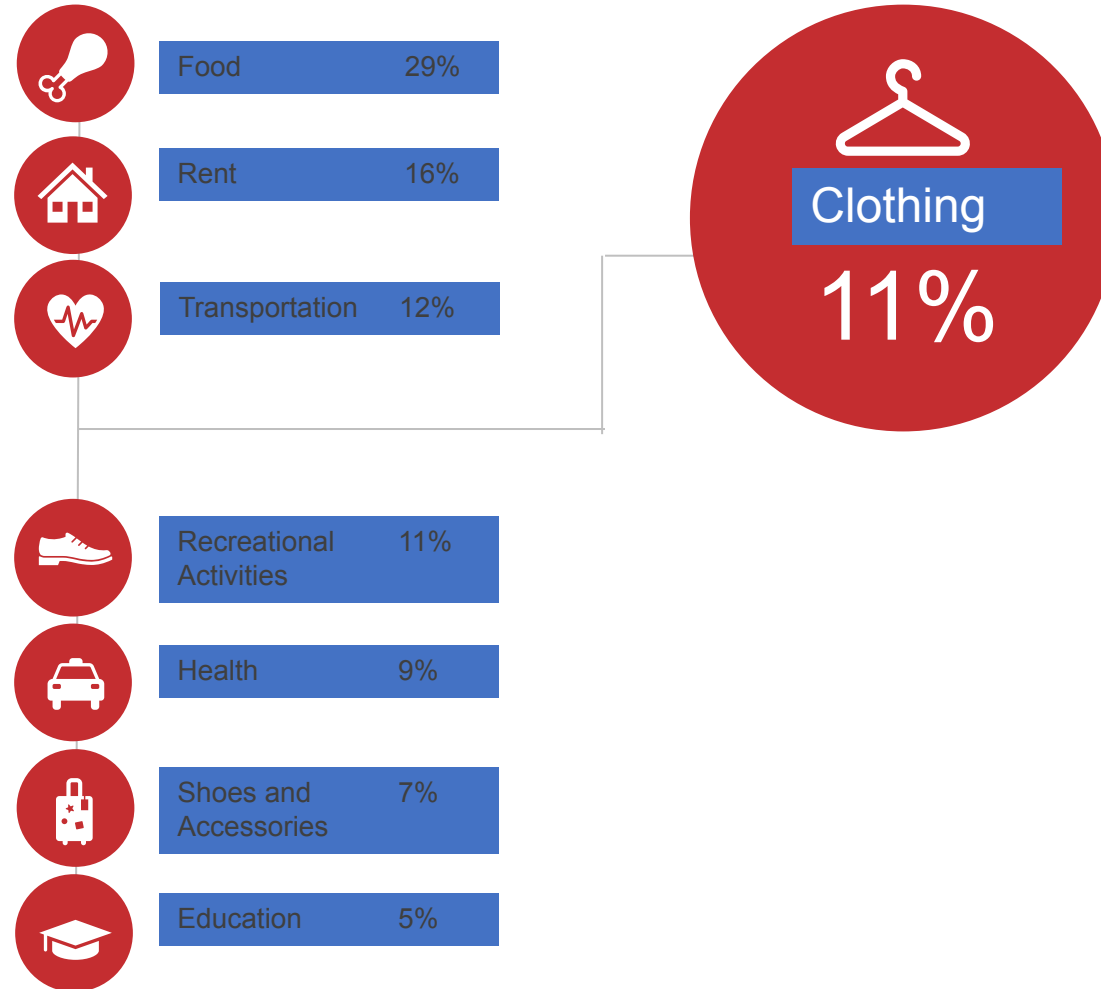




# People in Hong Kong spend more on clothes than health and education



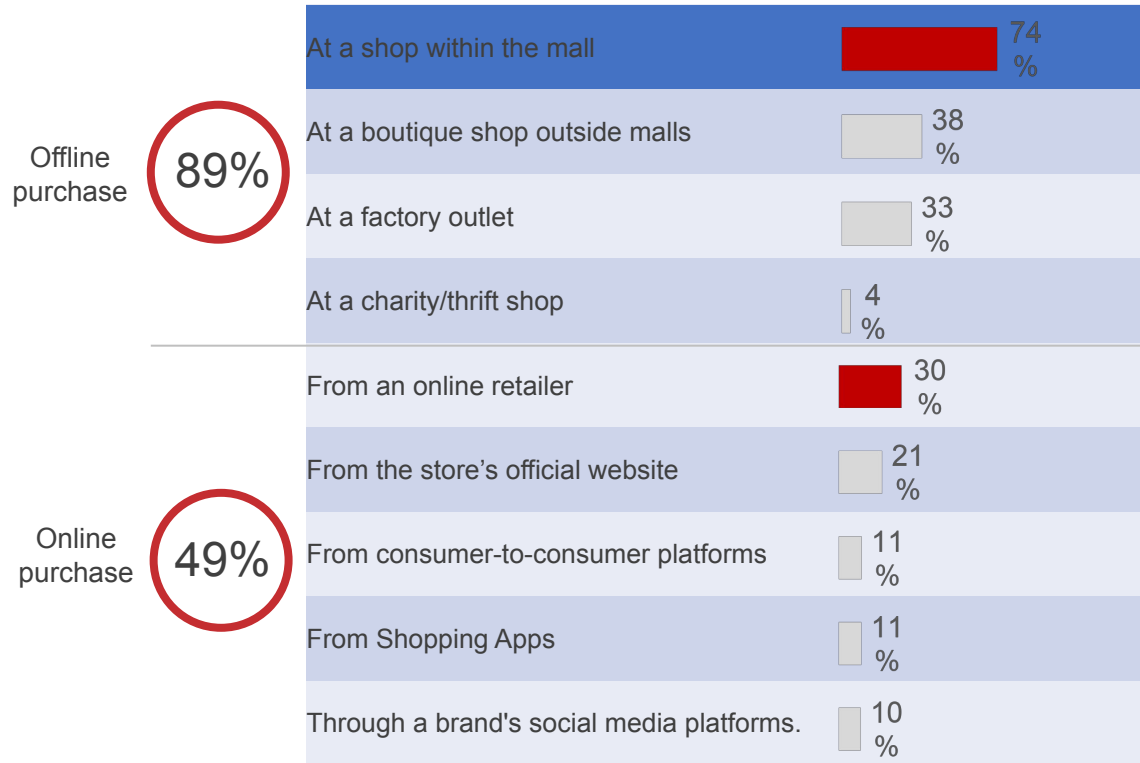
Average proportion of monthly expenditure



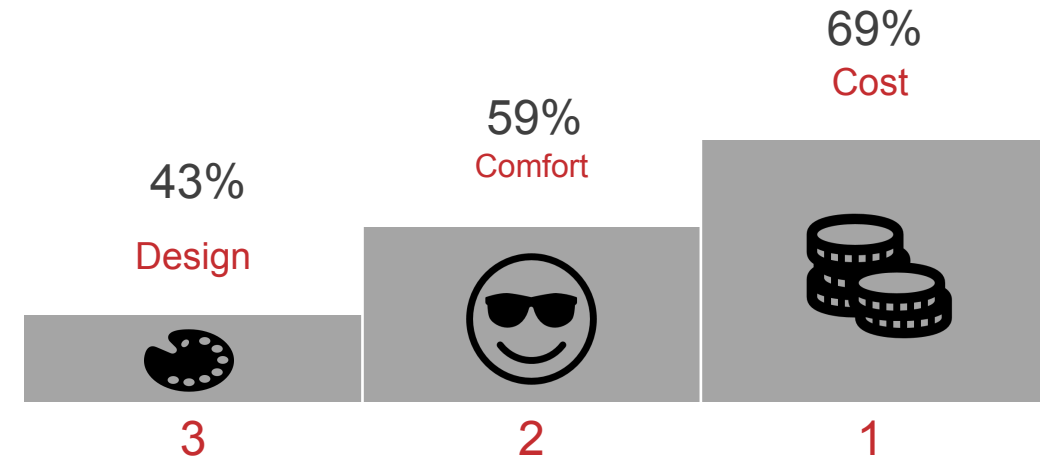
# Hong Kong people continue to favour offline shopping with cost and comfortability being the most important consideration factors



## Purchase Method



## Purchase Considerations



Source:

Q4. Where do you usually purchase your clothes?

Q8. What do you consider when buying new clothing?

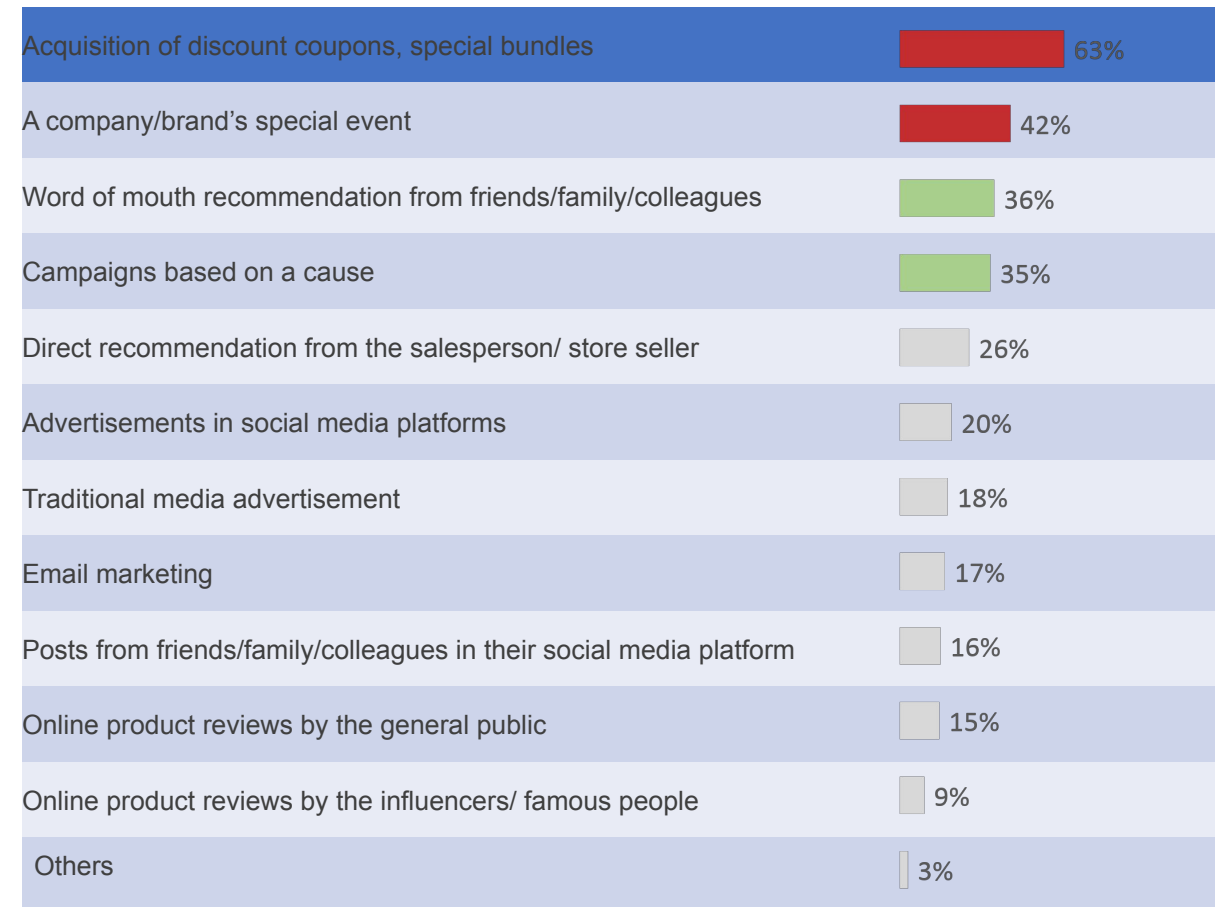
Base: All respondent (n=1,000)

# Price is the most important consideration for purchasing clothing, however discounts and special prices are also key triggers

## Purchase Triggers



## Purchase Influence



Source:

Q6. What triggers you to purchase new clothing?

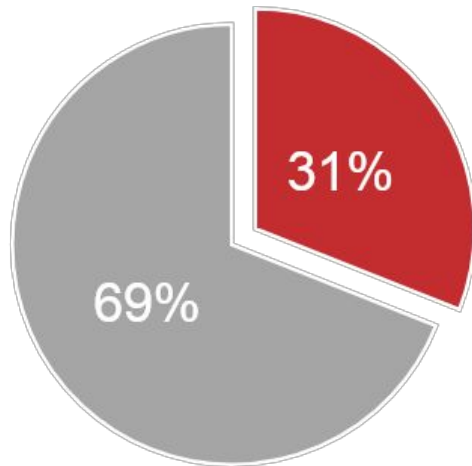
Q7. What kind of marketing influences you the most to purchase new clothing?

Base: All respondent (n=1,000)

# The majority of the public are skeptical about owning/using secondhand clothing items, with hygiene-related issues highlighted as the strongest barrier



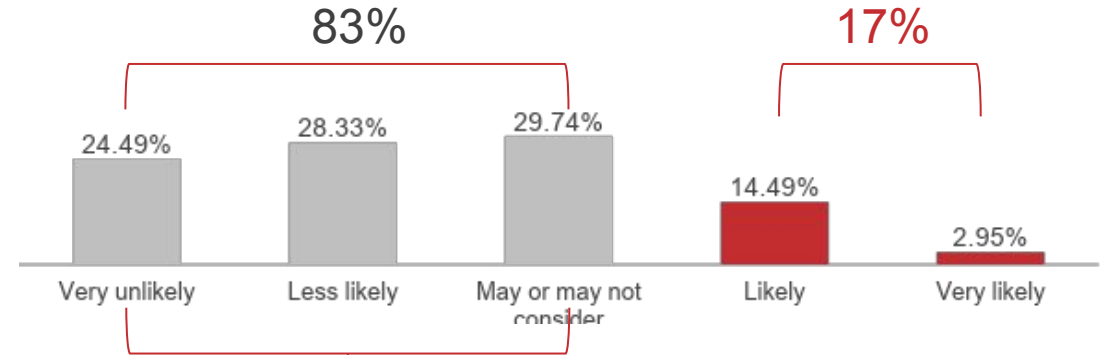
## Secondhand Items Ownership



- Own secondhand clothing
- Do not own secondhand clothing



## Likelihood to Purchase



### Top 3 reasons for not purchasing

- 69% Potential hygiene-related issues
- 40% It may have hidden flaws or damages
- 33% The overall quality of it may not be as good as the brand-new items

Source:

Q9. Do you currently own any secondhand clothing

Q13. How likely are you to consider buying secondhand clothes in the near future? 5-point scale

Base: All respondent (n=1,000)



# Current owners of secondhand clothing usually received them from someone else instead of purchasing



## Acquisition Method



71%

Passed down by someone



29%

Bought from shops that sell secondhand items



17%

Bought from social media channels



14%

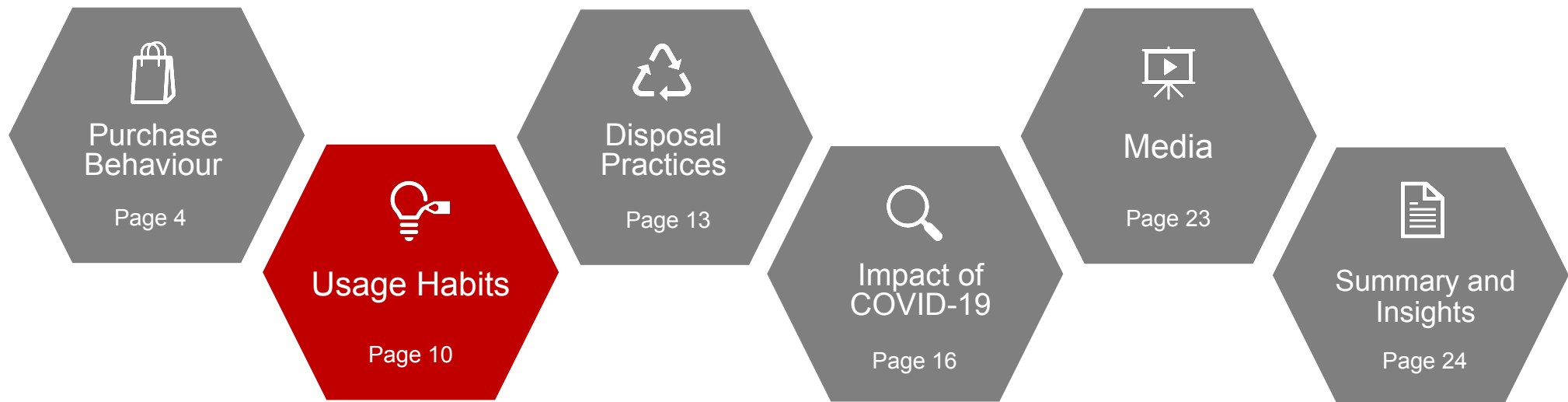
Swapped with someone



9%

Rented clothes for a period

*Scores are based on the 32% of respondents who own secondhand clothing items*



# More than half of clothes in Hong Kong closets are items that people use less, with impulse buying as the main reason for purchasing unused items

## 💡 Average proportion of clothes owned

*Below scores are the average proportion of clothes in the closet*

**38%** Clothes that I wear at least once a week

**19%** Clothes that I wear frequently (at least once a month)

**12%** Clothes that I wear less frequently (at least every 2 months)

**21%** Clothes that I rare wear (3 months to a few years)

**11%** Clothes that I keep but don't use anymore

## 💡 Reasons for keeping unused clothes


**49%**

of the public claim that they have at least some clothes that they continue to keep but do not use

Unused items that were **worn at least once**

### Top 3 reasons for not wearing anymore

  
Wrong Style  
(45%)


  
Bought on impulse  
(43%)


  
It does not fit  
(39%)

*Scores are based on the 49% of the respondents who keep at least 6% of clothes they don't use*

Unused items that were **never used at all**

### Top 3 reasons for not wearing

  
Bought on impulse  
(46%)

  
Forgot that they have it  
(41%)

  
Wrong Style  
(40%)

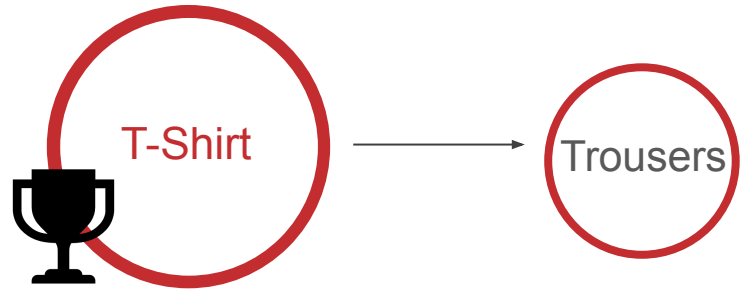
Source:

Q15. Thinking about all the clothing items in your closet, please provide the rough % estimate for each of the following scenarios. Base: All respondent (n=1,000)

Q16. You have mentioned that you own at least one item of clothing that you do not use anymore or have never worn at all, what are the most likely reasons for not wearing it at all? Base: All respondent (n=488)

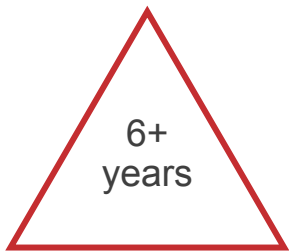
# Apart from sentiment, people keep their clothes with the hope that they will wear them again one day

## Oldest Item of Clothing



The oldest item kept by the majority (35%)

The second oldest item kept by the Hong Kong public (22%)



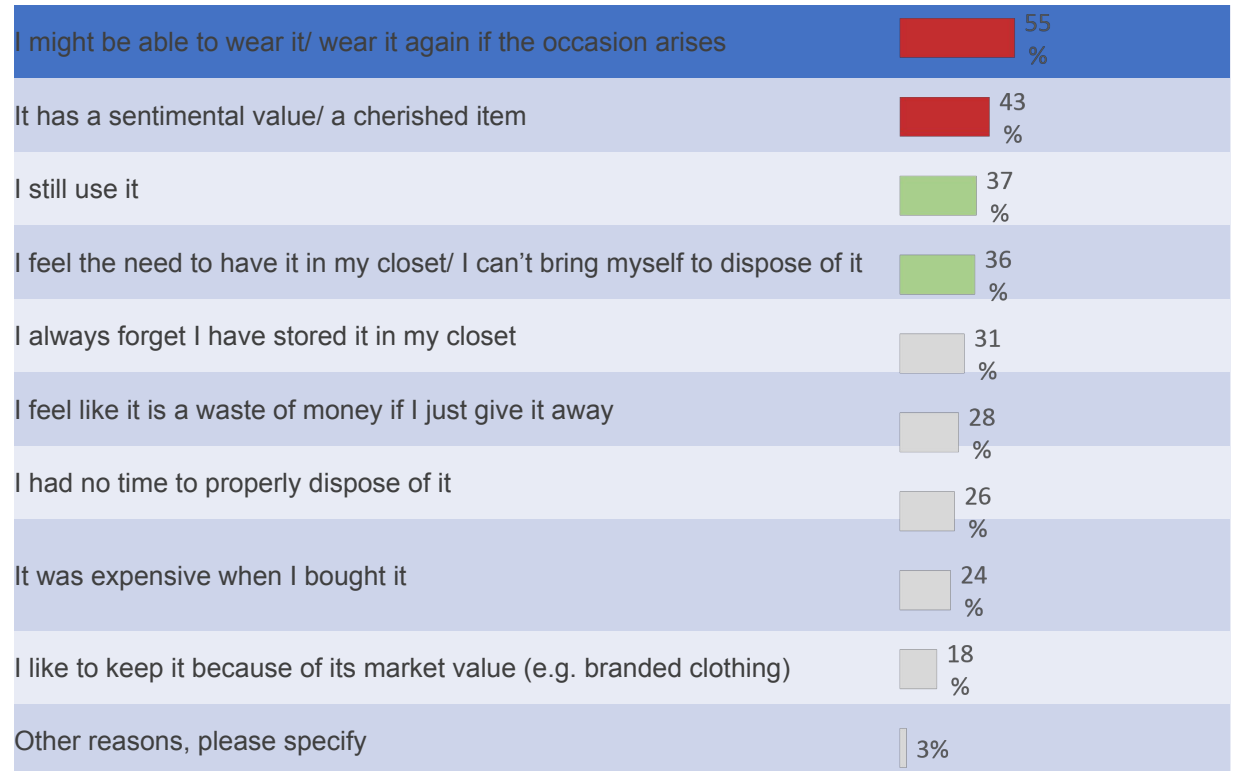
Average age of the oldest item kept by every 1 out of 2 consumers

wherein

**33%**

of the public keep their clothes they've acquired more than 10 years ago.

## Reasons for keeping



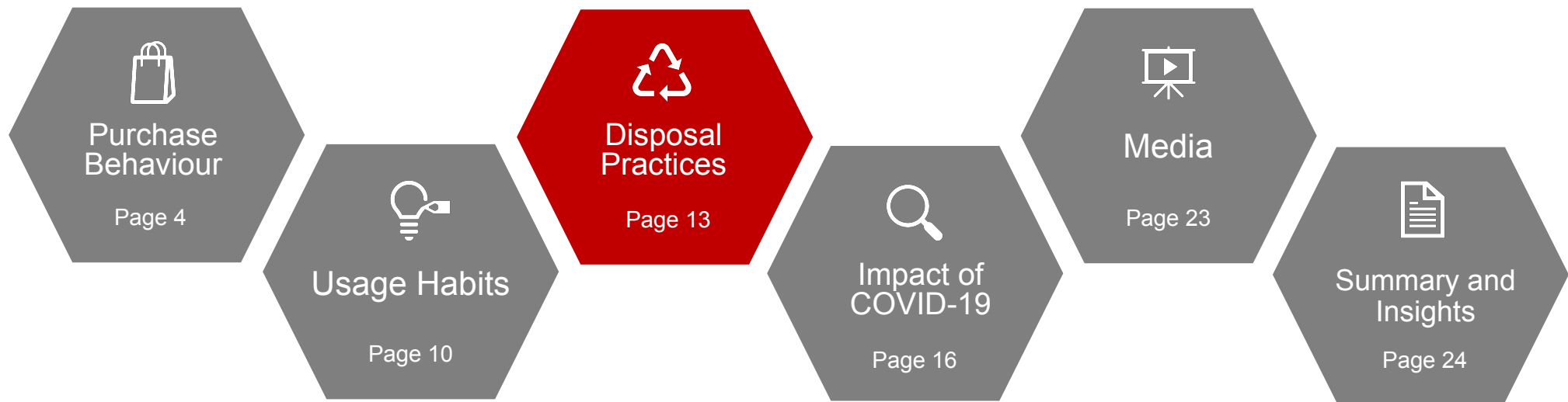
Source:

Q17. What is the oldest item of clothing that you own?

Q18. Still thinking about the oldest item of clothing that you have kept, how long ago did you acquire it?

Q19. Still thinking about your oldest item of clothing that you keep, what are the likely reasons why you owned it for so long?

Base: All respondent (n=1,000)



# Though a large proportion of the public finds a way to recycle clothes, nearly one third also claim to throw them in the garbage



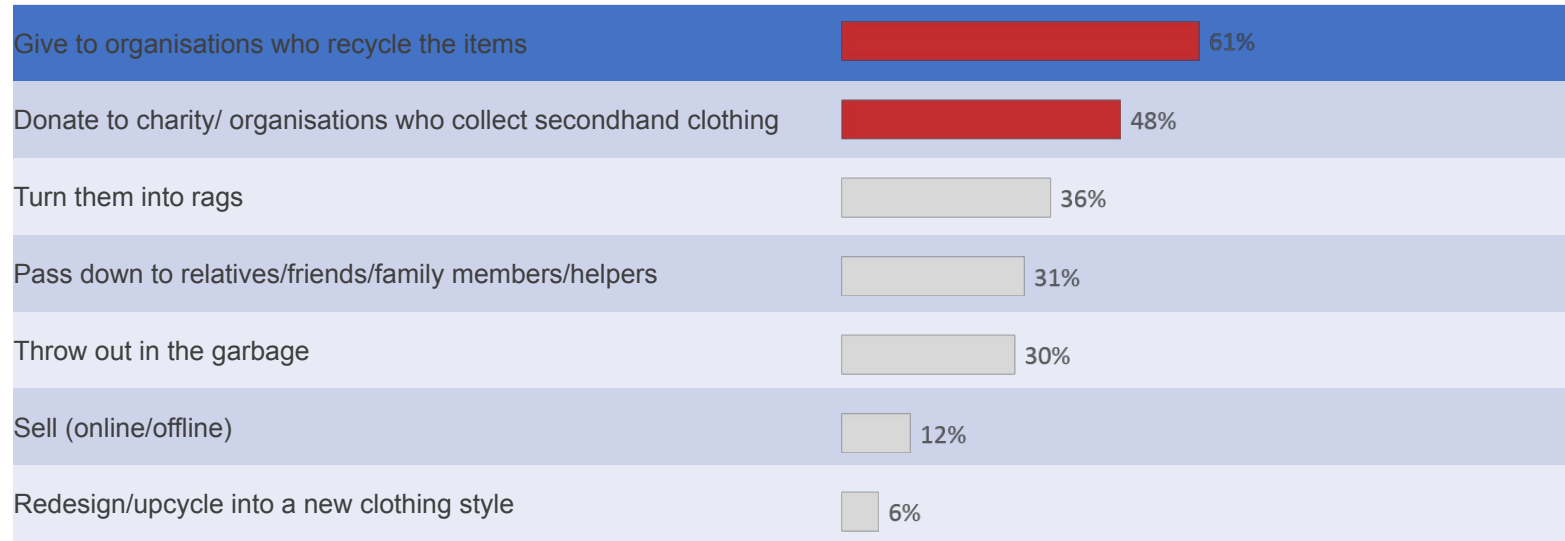
## Average time kept before disposal



average length of time kept before disposal



## Disposal Method



Source:

Q20. On the average, how long do you keep your clothes before disposing, giving it away, or donating?

Q21. Thinking about disposing your clothes, which of the following do you do with clothes you no longer want?

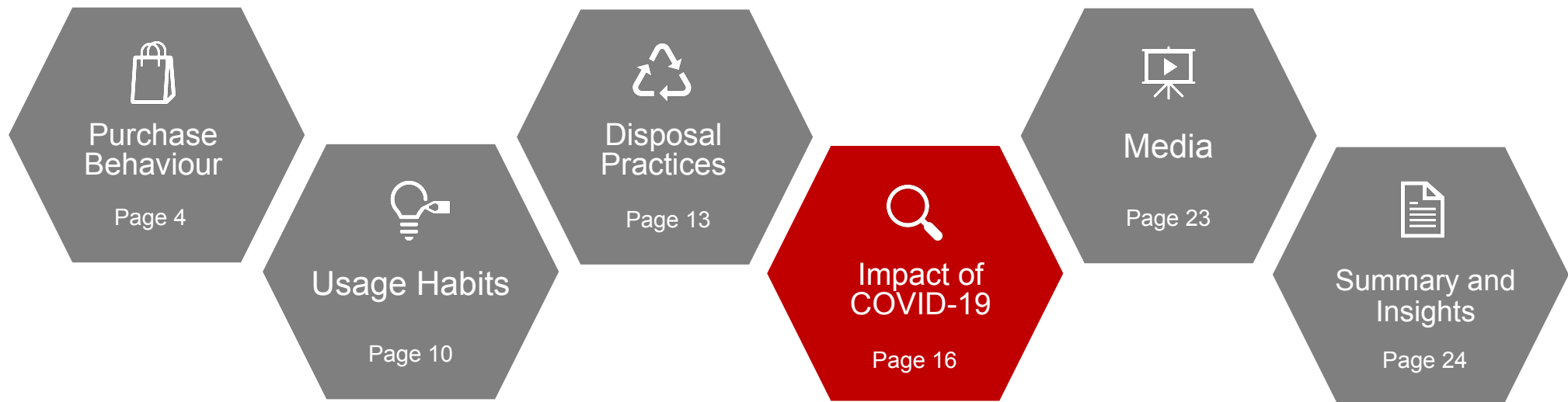
Base: All respondent (n=1,000)

# Most of the public believes donated clothes are used for good causes, but one in five also believe that they fill up landfills and/or are sold for profits



## Thoughts on donated items

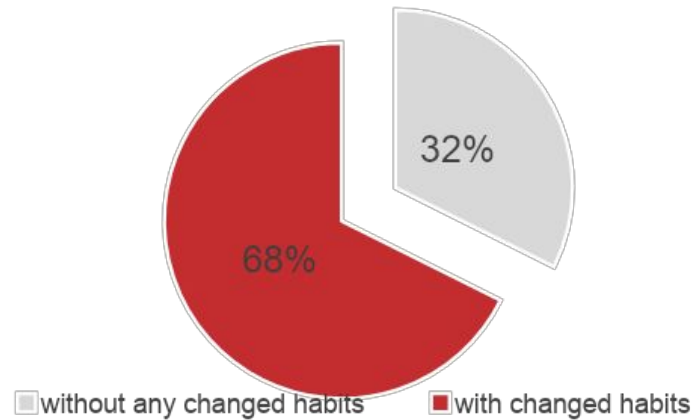






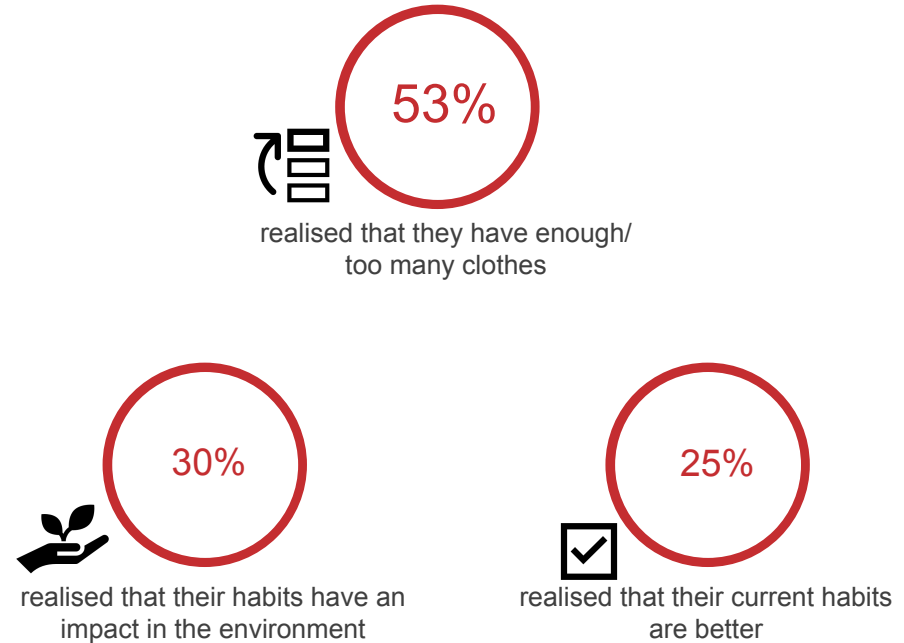
# With increased awareness of their clothing consumption habits, 2 out of 3 Hong Kongers have changed them during the pandemic

## Changes in habits during the pandemic



- 58%** Changed their purchasing habits
- 38%** Changed their using habits
- 29%** Changed their disposal practices


## Reasons for continuing changed habits



*Scores are based on the 68% of respondents who claim to have changed their habits*

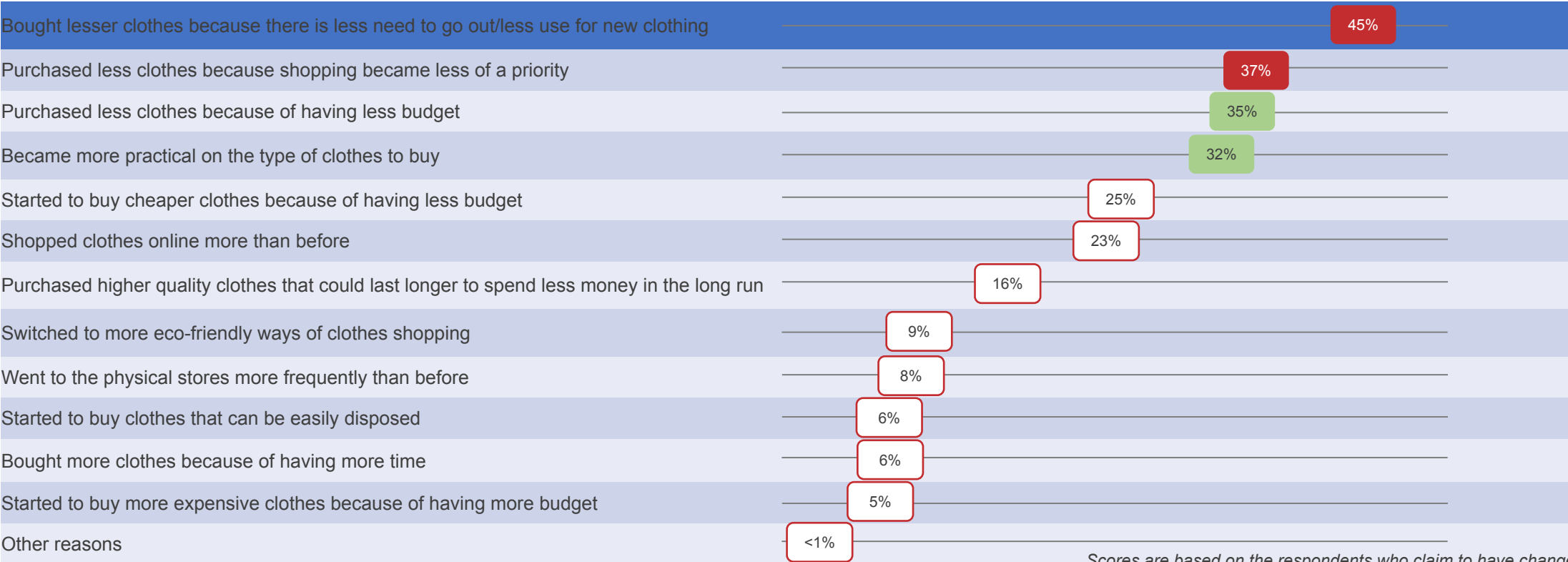
# Purchasing new clothing items became less of a priority for the vast community due to practicality and the lesser number of occasions for going out

## Reasons for changing Purchasing Habits

 **58%** of the Hong Kong public have changed their purchasing behaviour during the pandemic

### Behavioural Change

 **50%**

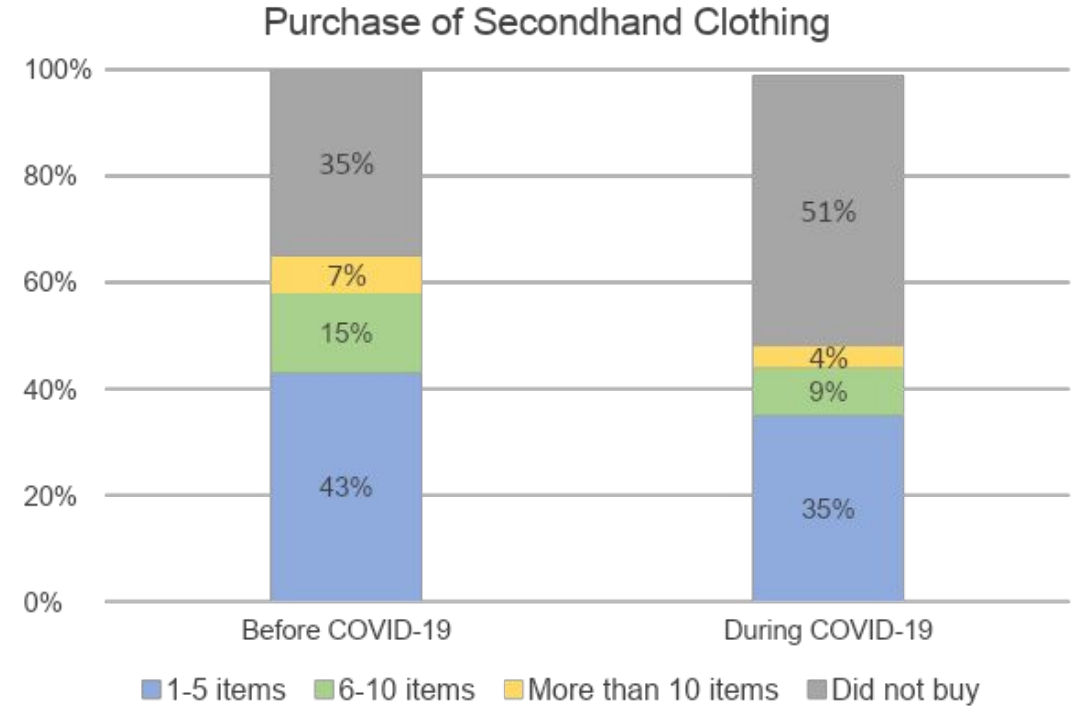
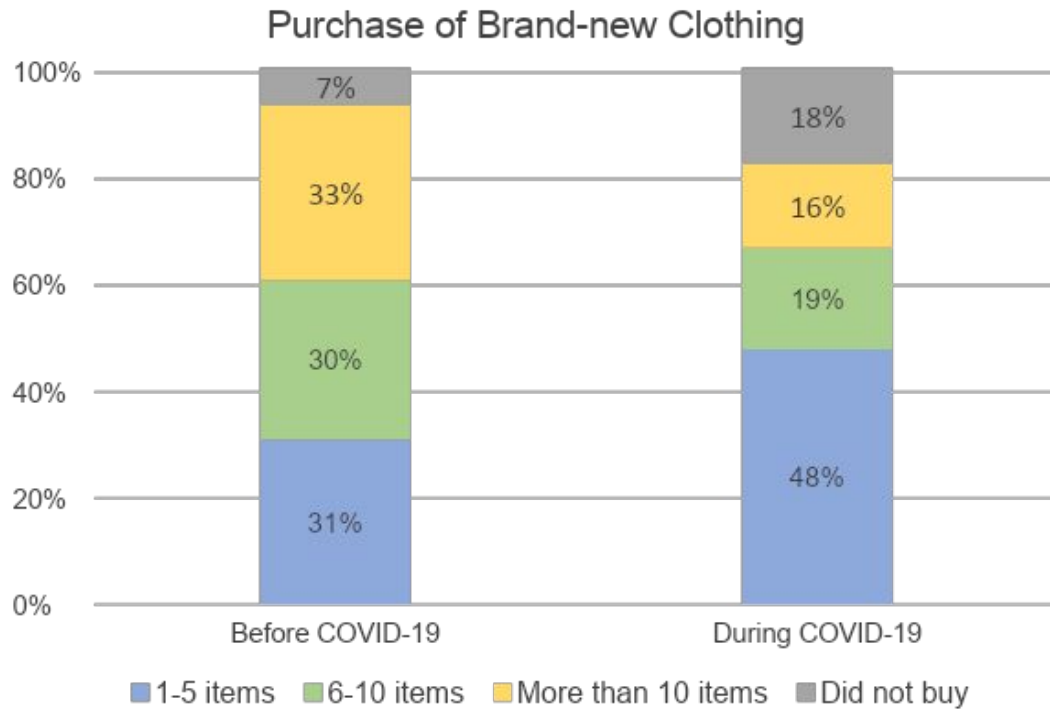


*Scores are based on the respondents who claim to have changed their habits*

# Purchasing clothes during the pandemic has decreased significantly, especially for secondhand clothes with more than half of the respondents not purchasing any at all



## Average Items Purchased



*Scores in the above table are based on the respondents who currently owns secondhand clothes*

Source:

Q2. Thinking about the year 2019 (the time before the COVID-19 pandemic became widespread), on average, how many items of brand-new clothing did you purchase? Base: All respondent (n=1,000)


Q3. Thinking about the current year (the time during the COVID-19 pandemic), on average, how many items of brand-new clothing have you purchased? Base: All respondent (n=1,000)

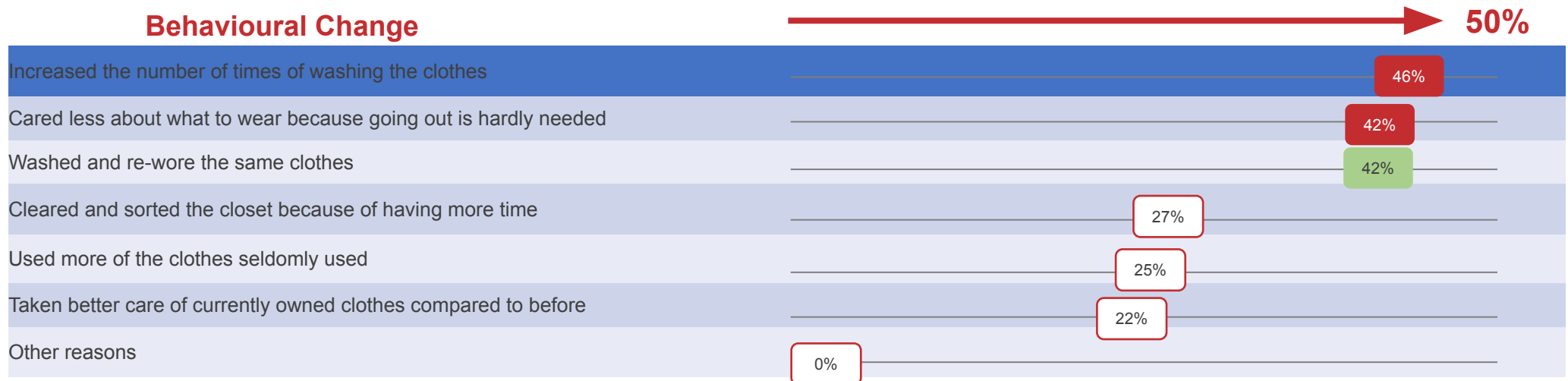
Q11. Thinking about the year 2019 (the time before the COVID-19 pandemic became widespread), on average, how many items of secondhand clothing did you purchase? (n=311)

Q12. Thinking about the current year (the time during the COVID-19 pandemic), on average, how many items of secondhand clothing did you purchase? (n=311)

# Given people stayed at home more during the pandemic, people tend to wear the same clothes regularly rather than wearing other items in their closet

## Reasons for changing Usage Habits


 **38%** of the Hong Kong public have changed their usage habits during the pandemic

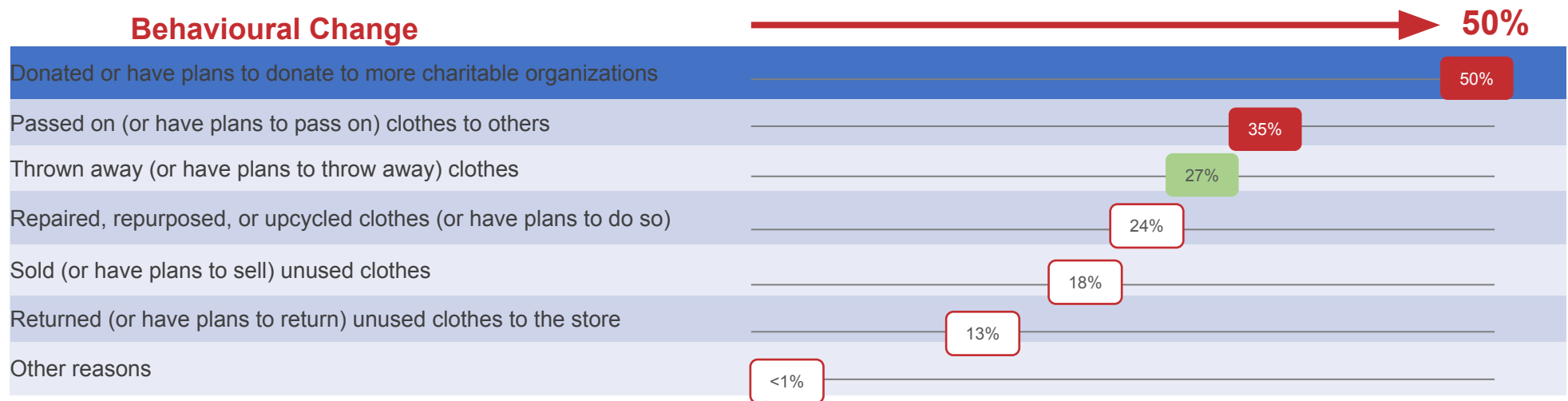


*Scores are based on the respondents who claim to have changed their habits*

# Donating clothes to charity increased among nearly 1 out 3 people who have changed their disposal habits although simply throwing them away remained to be one of the top options for disposal

## Reasons for changing Disposal Habits

 **29%** of the Hong Kong public have changed their disposal practices during the pandemic

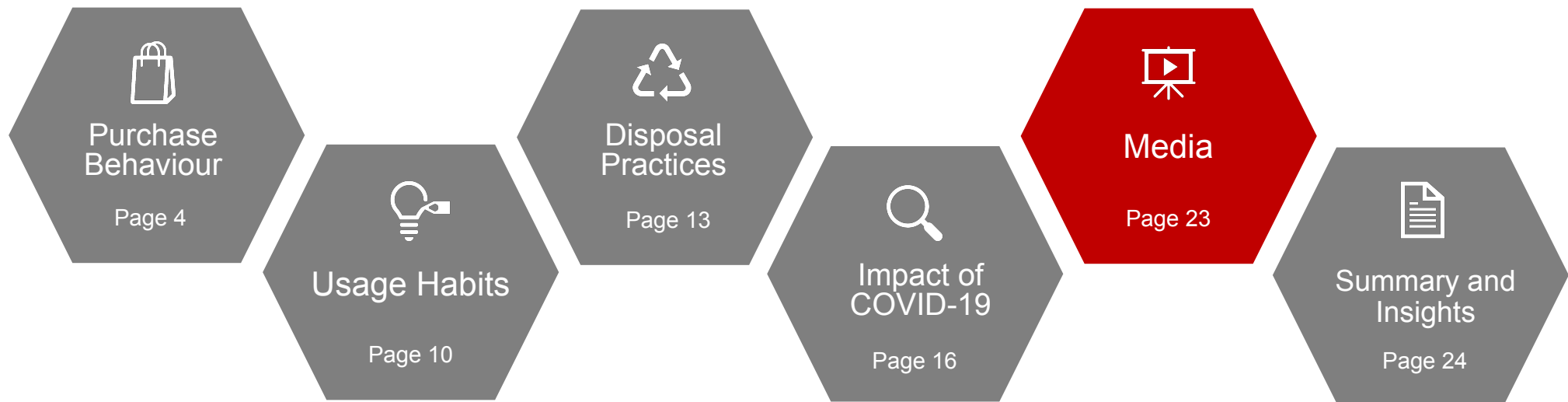


*Scores are based on the respondents who claim to have changed their habits*

Source:

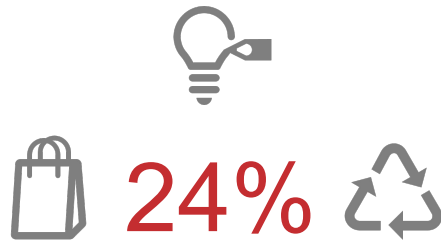
Q23. Considering your clothing consumption habits during the pre-COVID-19 period, have there been any changes in those habits during the pandemic? Base: All respondent (n=1,000)

Q26. Thinking about disposing your currently owned clothes during the current COVID-19 situation, which of the following changes could you relate to? Base: Respondents with changed disposal habits (n=290)



# People rely less on traditional media when getting information about clothing, with a quarter of the public feeling that they need more advice

## Need for more information



Average number of respondents who agreed that more information across the 3 areas of clothing consumption is **highly needed**

## Sources of Information

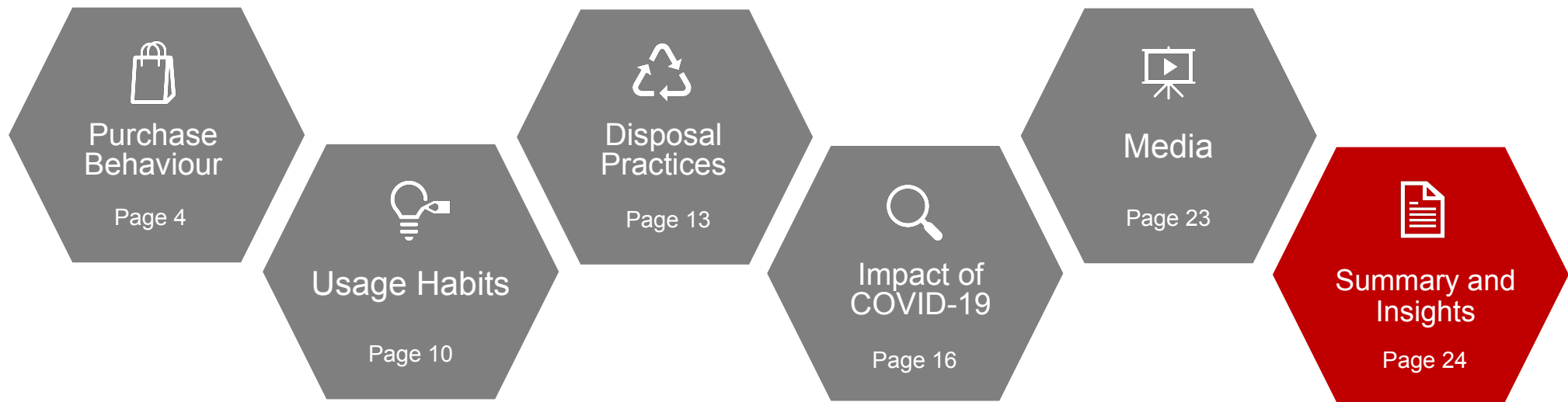
Platforms	Information on Clothing Purchase	Information on Clothing Usage	Information on Clothing Disposal
Online search engines	33%	38%	34%
Social Media	33%	30%	29%
Word of mouth from friends/family/colleagues	30%	35%	25%
Company/brand websites	30%	23%	20%
Directly from store seller	30%	29%	18%
Company/brand mobile apps	20%	17%	16%
Consumer Council	19%	16%	14%
Articles in newspapers	19%	21%	12%
Articles in magazines	17%	19%	11%
TV program coverage	17%	18%	10%
Leaflets/posters	13%	12%	10%
Radio coverage	9%	11%	9%
Government Platforms	8%	12%	9%
Podcasts	7%	11%	7%
Others	1%	2%	2%

Source:

Q28. To what extent do you think you need to know more detailed information about the following areas of clothing consumption? 7-point scale

Q29. Thinking about all the possible sources of information that you might use, where do you go to get information or advice in terms of purchasing clothes, proper use of clothes, and proper disposal of clothes?

Base: All respondent (n=1,000)





# Summary and Insights for Media

Purchase Behaviour	Usage Habits	Disposal Practices
<ul style="list-style-type: none"><li>• While the Hong Kong public considers cost to be the most important factor when purchasing clothing, they tend to also spend on clothes more than health or education.</li><li>• There is a huge preference for shopping in-person instead of online, with more appeal when purchasing brand-new clothes than secondhand items due to hygiene and quality concerns.</li></ul>	<ul style="list-style-type: none"><li>• More than half of the people's wardrobe are full of clothes that they use less regularly.</li><li>• People's oldest items are at least 6 years old, with more people keeping clothes they've owned for more than 10 years.</li><li>• There is a tendency to keep the items due to sentimental reasons or the belief that they can wear them again soon.</li></ul>	<ul style="list-style-type: none"><li>• On average, the general public usually start to consider disposing their clothes if they have owned them for at least 1 year.</li><li>• Although giving clothes away for recycling or charity are the top methods of disposal, if the clothes are kept for more than 5 years, people are less likely to dispose them.</li><li>• People are likely to consider throwing away unused clothes more than selling or upcycling.</li></ul>

## Covid-19 Implication

<ul style="list-style-type: none"><li>• Since people go out less and have become more practical because of the pandemic, the trend on purchasing more clothing items declined, alongside the dramatic increase on the number of people who have not purchased any item at all.</li></ul>	<ul style="list-style-type: none"><li>• Because of the lesser frequency of going out, those who have changed their using habits started to wash and re-wear their clothes more frequently.</li><li>• Apart from this, they also cared less about the clothes that they wear for the day.</li></ul>	<ul style="list-style-type: none"><li>• Those who have changed their disposal habits donated or have plans on donating more of their clothes to charitable organisations. However, throwing items away has also increased in practice.</li></ul>
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