The Project

Background/method

Results Highlights
Investigating the potential for higher utilization of garments

- Sep 2021 – Aug 2023
- 2,3 MSEK
  - 50% from RE:Source
  - 50% in kind from project partners
Background

• The production phase causes 80% of an average garment’s environmental impact over its lifecycle.

Source: Klimatpåverkan från svenskarnas kläder - Mistra Future Fashion

Utilization is one of three important dimensions to achieve a more circular economy.

Source: Three-dimensional product circularity - Boyer - 2021 - Journal of Industrial Ecology - Wiley Online Library
Method Garment Wear Study

- A smart phone app was developed for the registration purpose.
- During the spring of 2022, 340 people registered their garment wear every day for a 100-day period.
- Before starting the registration period, the users were also asked to estimate the total number of garments per garment category in their wardrobe, in a Google sheet survey.
- The users were recruited from the customer clubs of the three brands: Asket, Filippa K and Houdini. The users were offered a gift check from the brand as a thank you for participating.
- The garments were registered based on garment category, brand, purchase price and if they had been purchased second hand or new.
- No logging of underwear, socks, shoes or training gear was done.
- Users were asked to register all clothes worn during a day, so including change of clothes during the day.
During the autumn of 2022, four focus group sessions were held with, in total, 11 of the users from the study. Qualitative questions about the users’ wardrobes, the purchase and daily wear decisions and what makes a garment a favorite or not, were discussed.

Another 3 interviews and one short meeting with people working with garments and wardrobe coaching have been held on-line to further explore the qualitative part of the study.

The full project group has held one workshop to analyze the dataset from the user study and one workshop to develop the results based on the findings from the focus group discussions. Further results have been developed by the researchers.

An additional survey was set up in collaboration with Rethink Borås during June 2023, in their pop-up store in central Borås. 41 people (whereof 90% women) answered the survey, which added value to understanding wardrobe size and preferred business models.

Method Focus Groups & Interviews
About the users and estimated wardrobe the data set

- The users are not "average users", since they belong to the brands' customer clubs. We assume that they are people with more affordability and with more focus on quality and longevity than the average user.

- The wardrobe data (and thereby usage of total wardrobe) could not be estimated correctly, due to:
  - Continuous underestimation of wardrobe size (unique garments used > no of garments over two inventories)
  - The wording of the questions asked were ambiguous ("estimate", "count", "wardrobe")
  - The detail level of reported data over the period was too low (new purchases and removals not registered)
  - General issue of self-reported data and social reliability issues
Results Highlights – Wardrobe Size 1

- It is difficult to keep track of wardrobe size, and in general people seem to underestimate the size of their wardrobe. Or in other words: People don’t know how many garments they need.
- This result confirmed our hypothesis - even if in another way than expected (which was a lower usage of wardrobe number).
- The app use helped people understand their usage patterns.

A high number of respondents logged more garments over the 100-day period, than what they had registered in their wardrobe. This persisted after the second inventory.

"You notice how you use the same cohort of clothes again and again. You had so much more garments than what you thought."
Many people want to have a smaller more “easy-to-wear-match-pick” wardrobe, since this would relieve them from hassle and unnecessary decision making.

Focus group results showed that no one wants a bigger wardrobe and many wish to have a smaller wardrobe. The main reason is the unnecessary hassle of many garments.

The additional survey confirmed the results, with a somewhat higher tendency to be satisfied with the current wardrobe size.

"It’s relieving not to have so much stuff."

"I would really like to reduce my wardrobe. I would like it to be more minimalistic. Better usage and less messy. But it’s unnecessary to get rid of what I already have."

"Reason: Less messy, some environmental consciousness. Something about not burdening the brain with unnecessary decisions every day. Simple."
The cost per wear is less related to purchase price and more to number of wears.

The implication is that long-lasting and versatile garments with high quality and higher purchase price could lead to decreased cost, compared to several cheaper garments filling the same functions.

Could the words and concepts “price”, “cost”, “value” and “investment” be used differently to better reflect “real cost”?

Over the 100-day period (only) CPW varies considerably less than purchase price between categories.

Over the 100-day period (only) CPW is similar for jeans and t-shirts - with 3 times difference in purchase price.

"Invest instead of shopping. If you can combine it with three other garments, then it's a good investment."

"Price is not so important, since I choose so few garments."
There is a huge inefficiency in the use of garments. Many garments are used very seldom.

The usage patterns differ between categories. Could, for example, purchase and usage patterns for jeans and jackets be replicated to other categories?

The usage pattern is different between men and women. Men own less garments and have higher usage rates than women on average.

The usage rate increases with purchase price.

The usage rate of garments from our three brands exceeded that of the “other” brand.

There are 2953 garments that were only used 1 time during the period. These are 23% of the total number of garments used.

Male: "I have 33 garments in my wardrobe. That’s just right."

- The 10 most logged garments were all used by men.
- Men used one third less unique garments over the period.
- Men’s wardrobes are half the size of women’s wardrobes.
Results Highlights – Favorite garment features

- The following features stand out as important for garments “at its best” and garments that become favorites:
  - Comfortable
  - Good fit
  - High functionality
  - Easy to match (often one colour)
  - Quality
  - Adjustable/flexible
  - Social code/belonging
  - Nice/pretty/trendy
  - Garments that build self-esteem

“Higher quality and better fit.”

“It’s relatively expensive garments of good quality. Timeless, classic, good material. Easy to match with other garments.”

“But I also like clothes because they are pretty. A bit like art.”

“When they make you feel like a better version of yourself. They build self-esteem.”
The following features are related to “clothing at its worst”:

- Not durable
- Break or loose fit after washing
- Details without function
- Uncomfortable
- Fast fashion

"When they are not durable.”

"Nice clothes that don’t stand washing.”

"Bad fit, and you walk around and suffer all day because they don’t fit you.”

"Fast fashion is bad.”
Garment presentation
Recommendations

• Reduce number of garments and models in shop.
• Introduce environmental/life cycle information on the garments. Even better: Price in sustainability effects.
• Avoid “more for less” type of offers.

"I would rather see a limited offer, or a very good search filter."
Business Model Recommendations

• Explore new service offers, such as repair, tailoring services, rental (selected garment categories) and brand-specific second-hand.

• Support your customers in buying the garments they need and will love, through for example advisory services and possibility to test before buying.

• Support your customers in circulating their low-usage garments by enabling and promoting wardrobe clearing and recirculation, through for example advisory services and app solutions.

• Offer life-time (or long) warranty.

• Create a community and inclusion to build trustworthiness among customers.

"It would be more attractive if the brand stores sold their own stuff second hand."

"Maybe advisory services. The most important thing is that something works. The key to using less garments is knowing that something works. Testing would be good."

"You notice how you use the same cohort of clothes again and again. You had so much more garments than what you thought."

"Lifetime warranty is a good idea. Then I would be willing to pay a higher price. To feel trust in a company and trust what they say."

• The additional survey showed that repair and tailoring services is the most preferred business model with 71% being positive to the service if in the vicinity of the user and 51% being positive if offered in store.

• The additional survey showed that curated second-hand in brand stores was the second-most preferred business model with 56% of the respondents being positive.
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