CITIZEN INSIGHTS

CITIZEN INSIGHTS: ESTIMATING THE LONGEVITY OF HOME TEXTILES IN THE UK

Key Findings Report

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About WRAP

WRAP is a climate action NGO working around the globe to tackle the causes of the climate crisis and give the planet a sustainable future.

Our core purpose is to help you tackle climate change and protect our planet by changing the way things are produced, consumed, and disposed of.

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Front cover photography: Stack of folded warm blankets with different design patterns and cotton branch on grey background.

Executive summary

WRAP commissioned this research to understand citizen perceptions of home textiles' longevity. The key objective was to establish a strong 'state of play' evidence base on the following:

- When/where/how different home textiles were acquired
- Purpose/occasion for usage
- Longevity - how long people expect to use the items for
- Frequency of use/wash
- Reasons for not using them.

The insights will equip businesses with an understanding of textiles' active life and inform the development of circular business guidelines.

The research focused on 10 home textiles: bed sheets, duvet covers, bathroom towels, fabric tablecloths, fabric curtains/blinds, cushion covers, bedspreads/throws, rugs, duvets and pillows.

A total of 2,004 interviews were conducted with UK citizens aged 18+ who currently own and have purchase decision-making responsibility for in their home for at least two of the target home textiles. Respondents were then randomly allocated to answer about two of these that they currently own. Quotas were set on age and gender (interlocked) and region, to ensure that the sample matched the known profile of the target cohort of UK citizens.

Key findings

Purchase

- UK citizens most frequently cite price as a key purchase influence when acquiring home textiles. This is followed by the quality of the fabric, the product specification, ease of cleaning and maintenance, design/style, and product durability. By contrast, other factors – including the sustainability of the materials – are much weaker purchase influences.
- Durability varies as a purchase influence. It is a strong influence for items like rugs, fabric curtains/blinds, bathroom towels and bathroom sheets, but less influential for cushion covers and only a weak purchase influence for pillows.
- The vast majority (89%) of home textiles are acquired brand new. By contrast, the second hand/vintage market is a small acquisition route, accounting for one in twenty-five (4%) items. This compares to 10% of all clothing items in the previous clothing longevity study[1].
- Close to two in three (65%) of the items were acquired in store and 35% online. This is similar to the share of clothing purchases (69% in store; 31% online).

In-use

- Cleaning and drying methods vary considerably across the home textiles.

[1] https://wrap.org.uk/resources/report/citizen-insights-clothing-longevity-and-circular-business-models-receptivity-uk

  - Domestic washing machines are prominent for many home textiles including bed sheets, bathroom towels and duvet covers (more than 90% of UK citizens report regularly washing these in a washing machine at home). Around two in three wash duvets and fabric curtains/blinds in their washing machine, falling to around one in four for rugs.
  - A professional cleaning service is rarely used for items such as bed sheets, duvet covers and bathroom towels, but is more prominent for duvets, fabric curtains/blinds and rugs. Likewise, steam cleaning is rarely used for some items but significant for rugs.
  - Tumble drying of home textiles is cited by around one in five UK citizens, depending on the item (particularly for bathroom towels, bed sheets and duvets).

- Wash frequency varies considerably across the different home textile items. Fabric curtains/blinds are the item with the lowest average wash frequency (0.8 washes per month), followed by rugs (1.2) and pillows (1.3). Average wash frequency is highest for bathroom towels (6.0 washes per month), followed by bed sheets (4.2).

- Wash frequency is much higher among 18-34s, higher income households and households with children living at home. There is also a correlation between wash temperature and wash frequency, with those washing at higher temperatures (i.e., 50 degrees or higher) also washing home textiles with higher frequency.

- 30- and 40-degree washes are dominant for home textiles. However, around one in ten regularly wash them at 60 degrees, more commonly for bathroom towels, bed sheets and duvet covers.

- Repair of home textiles is very low. Around one in fourteen (7%) UK citizens say they have repaired the item they answered about, either themselves (4%) or through a paid service (2%). This is notably lower than the level of repair of clothing in the previous longevity study (22%).

Longevity

- The combined overall longevity estimate for home textiles is 6.9 years, compared to 4.3 years for clothing. However, the average masks a wide variation across individual items that ranges from fabric tablecloths (10.7 years) and fabric curtains/blinds (8.6 years) through to bedsheets and pillows (5.5 and 4.4 years, respectively).

- In addition to the overall average, the range of responses is also notable – with a significant proportion of UK citizens in the survey predicting notably shorter longevities of up to 18 months. This is particularly evident for pillows (39% of UK citizens estimate these will last up to 18 months), bathroom towels (25%), bedspreads/throws (23%) and duvet covers (23%).

- There are some key differences in estimated longevity according to demographic sub-groups as well as how the item was purchased and used in the home. For example:

  - <u>Acquisition type</u>: items purchased second hand/vintage have a *lower* estimated longevity than items purchased new: 5.6 years compared to 6.5 years. This is the opposite of the trend observed in the clothing longevity study, where second hand/vintage acquisition was correlated with increased longevity (5.4 years compared to 4.0 years if purchased second hand/vintage).
  - <u>Repair</u>: those who have undertaken a repair on an item of home textiles report a *lower* predicted lifespan - 4.3 years compared to 7.1 years among those who have not undertaken a repair. This is the opposite of the trend observed in the clothing longevity study, where undertaking a repair was estimated to add 1.3 years to the life of a garment, on average.
  - <u>Wash frequency</u>: there is a strong relationship between wash frequency and predicted longevity. Those who wash their home textiles item 2+ times per week estimate a longevity of 3.5 years, significantly lower than those who wash once per week (4.6 years), once per month (5.7 years), once every 2-12 months (8.6 years) or less often (9.9 years).
  - <u>Demographics</u>: There is a strong relationship with both age and income. For example, 18-34s reported an average longevity of 4.9 years, compared to 6.4 years among 35-54s and 8.8 among those aged 55+. Those with a household income of more than £40,000 per year estimate 5.7 years, compared to 7.8 years among those with a household income of less than £20,000 per year.
- <u>Brand/retailer mix</u>: there is an association with the brand/retailer where the item was purchased, with longevity estimates higher for items purchased from medium and higher cost brands/retailers (6.7 years) compared to lower cost retailers/brands (5.7 years).

Ownership and end of life

- UK citizens report ownership of an average of 56.9 items of home textiles (across the items in the study). This includes 9.9 bathroom towels, 8.1 cushion covers, 7.2 pillows and 6.4 bed sheets.

- On average, 11.8 of these items have not been used in the past year. This represents just over a fifth (21%) of home textiles in a typical UK home. There are notable variations across individual items, with fabric tablecloths and duvet covers the items most likely to be owned but not used in the past year; and rugs, fabric curtains/blinds and cushion covers the least likely.

- The main reason these items are kept but not in use is a desire to keep it as a spare or backup item. This is followed by a perception that it is no longer as nice, either because it "doesn't feel as nice" or "feels older" (potential product failure), as well as owning too many of this item. By contrast, a specific problem with the item (e.g. damage, stains, fading) is cited less frequently – indicating that non-use is driven less by product failure and more by perceptions.

- Collectively, only a minority dispose of home textiles to be reused or recycled, the most frequently used disposal route is the general rubbish (22% say they regularly dispose of home textiles this way). This is closely followed by charity shops (21%), a dedicated recycling area at the HWRC (20%) and repurposing the item for another use in the home, e.g. cleaning rags, pet bedding (18%).

- There are key differences in disposal across home textiles:
    - The general rubbish is the dominant disposal route for pillows and duvets, and it is also prominent for bathroom towels bed sheets.
    - Charity shops are the main disposal route for fabric tablecloths, bedspreads/throws (28%), fabric curtains/blinds, cushion covers and duvet covers.
    - Repurposing the item for another household use is a key disposal route for bathroom towels, bed sheets and fabric tablecloths.

What next?

- Insights on predicted longevity of different home textiles categories, wash frequency, acquisition routes, usage, purchase motivation, and reasons for not using the products will help Textiles 2030 direct businesses towards the right design decisions to help extend the life of home textiles in UK.

- There is a lot of variation in findings across the home textiles items (e.g. in terms of perceived durability, longevity, aftercare and disposal routes). Any guidance/business model should be specific to the product type.

- Encouraging citizens to take care of the home textiles with repair and better in-use care instructions will be key behaviour to focus on for Textiles 2030.

- There is a significant scope to support and motivate citizens to reuse home textiles, if in good condition donate for resale but at all costs avoid putting it in the bin. Home textiles is a valuable resource, if it cannot be reused or resold it will still make good feedstock for recycling.

- There is a significant opportunity for home textiles retailers and the reuse and recycling sector to adopt home textiles collection options/take back schemes, as currently consumers are unsure on their home textiles disposal routes.

- There is a potential to bring higher proportion of unused home textiles into active use by building awareness, as the non-use is driven less by product failure and more by perceptions.

- There are opportunities for brands and retailers to reduce the impact home textiles has on the environment by designing for circularity in key product categories. However, considerations need to be made to understand how this can be done for certain home textile products.

- Finally, there is an opportunity to build a market for circular business models within home textiles, encouraging businesses to move from selling a product to selling a concept change.

Contents

Introduction

80% of a product's environmental impact is determined at the design stage[2]. Therefore, design will play a pivotal role in moving away from the traditional linear model to a circular one. We must use circular design principles to a) Extend the usable life of textile products; b) Allow products to be recycled at end of life; c) Design out waste from the system; and d) Increase the demand for recycled materials. This will allow maximum value to be extracted from textile products, whilst cutting carbon emissions and relieving the pressure on natural resources associated with the primary production of virgin materials. It will also help to divert textile waste from landfill and incineration.

On this basis, improving the longevity of clothing is a key focus for the Textiles 2030 circularity working group, which has set various milestones, including the setting of durability standards in key categories, initial trials in these categories, and consistent citizen messaging on durable/recyclable products (to be delivered by signatories).

Following on from the Clothing Longevity and the Circular Business Models (CBM) surveys undertaken within the circularity pathway of Textiles 2030 workstream, WRAP commissioned this research to focus on home textiles' and investigate the following:

- When/where/how different home textiles were acquired
- Purpose/occasion for usage
- Longevity - how long people expect to use the items
- Frequency of use/wash
- Reasons for not using them.

The insights will equip businesses with an understanding of textiles' active life and inform the development of circular business guidelines.

A total of 2,004 interviews were conducted with UK citizens aged 18+ who currently own and have purchase decision-making responsibility for in their home for at least two of the following 10 home textiles that were covered in the survey: bed sheets, duvet covers, bathroom towels, fabric tablecloths, fabric curtains blinds, cushion covers, bedspreads/throws, rugs, duvets, and pillows.

The survey was undertaken online using a dedicated market research panel, with quotas set on age and gender (interlocked) and region, to ensure that the sample matched the known profile of the target cohort of UK citizens. The quota targets were established through an omnibus survey of a nationally representative sample of UK citizens.

Respondents were randomly allocated to answer about two of the home textile categories they currently own and have purchase decision-making responsibility for. Many of the questions are similar to those in the previous clothing longevity research, although there were necessarily some differences in how these were framed. Furthermore, in this research 'don't know' responses have been excluded to ensure that the responses are always based on those able to answer fully about each item of home textiles they were asked about.

[2] https://joint-research-centre.ec.europa.eu/scientific-activities-z/sustainable-product-policy_en#:~:text=It%20is%20estimated%20that%20over,throughout%20their%20entire%20life%20cycle.

Statistical significance

The survey involved a large and robust sample of UK citizens. However, given that a sample has completed the survey (rather than a census), the results are subject to statistical margins of error. Therefore, statistical tests have been performed to assess whether an apparent difference in the survey data (i.e. between sub-groups) is statistically significant or not[3].

These tests have been undertaken to the '95% confidence' level (i.e. 95 times out of 100 the observed difference will be real compared to 5 times out of 100 it will have happened by chance).

Analysis by different audiences and groups within the population

In addition to the results for the UK as a whole, analyses have also been undertaken according to a range of socio-demographic variables (e.g. age, gender, children in the household).

Structure of the report

The key findings outlined in this report are structured into the following sections:

(1) Purchase
(2) In-use behaviour
(3) Longevity
(4) Ownership and End of life
(5) Conclusions and opportunities

[3] Statistical tests are only valid when the survey method has used random probability sampling. While the market research industry routinely applies the same logic to non-probability samples, this must be done with appropriate caveats. For example, if the data reported throughout this report was generated from a random probability sample, then the confidence intervals discussed in the report would apply. However, as the data were generated from a quota sample, confidence intervals are – strictly speaking – not possible to calculate.

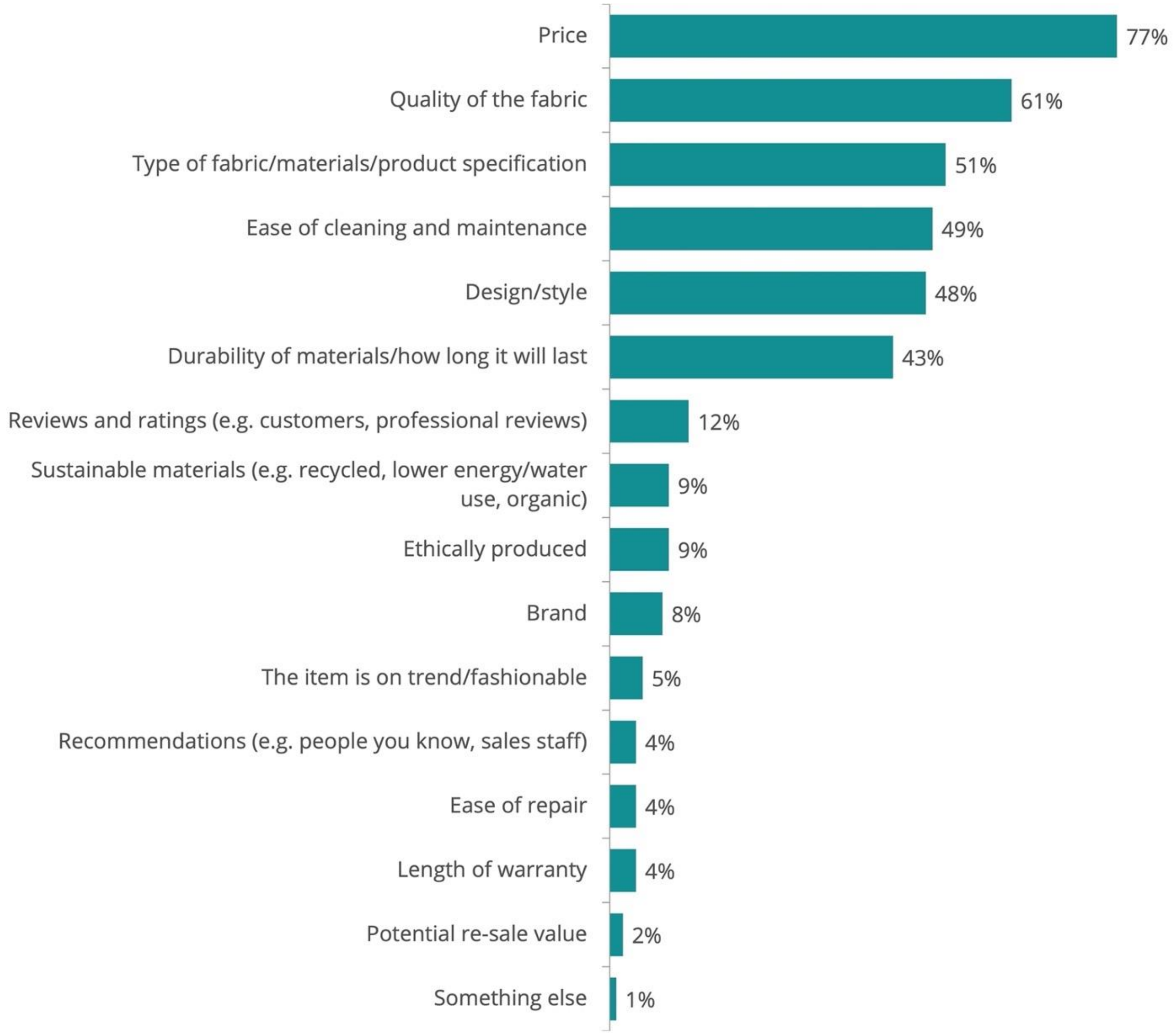
1.0 Purchase

1.1 Purchase influences

A hierarchy of purchase influences for home textiles is evident (Figure 1). This is led by price (cited by over three quarters – 77% – of UK citizens) and followed by the quality of the fabric (61%), the product specification (51%), ease of cleaning and maintenance (49%) and design/style (48%). The durability of the item completes the list of core influences, cited by 43%. By contrast, all other issues – including the sustainability of the materials – exert significantly less influence (at least directly).

Figure 1. Purchase influences

Q. When buying [ADD ITEM], which of the following factors is the most important to you? Please select up to five.
Base: 4,008 responses, with every respondent (2,004) answering about two categories of home textiles. September 2022



The hierarchy is relatively consistent across the home textiles, particularly cost which is prominent for all. However, there are some important differences to note for durability. For example, it is an important purchase influence for rugs, fabric curtains/blinds, bathroom towels and bathroom sheets; but less influential for cushion covers and only a weak purchase influence for pillows.

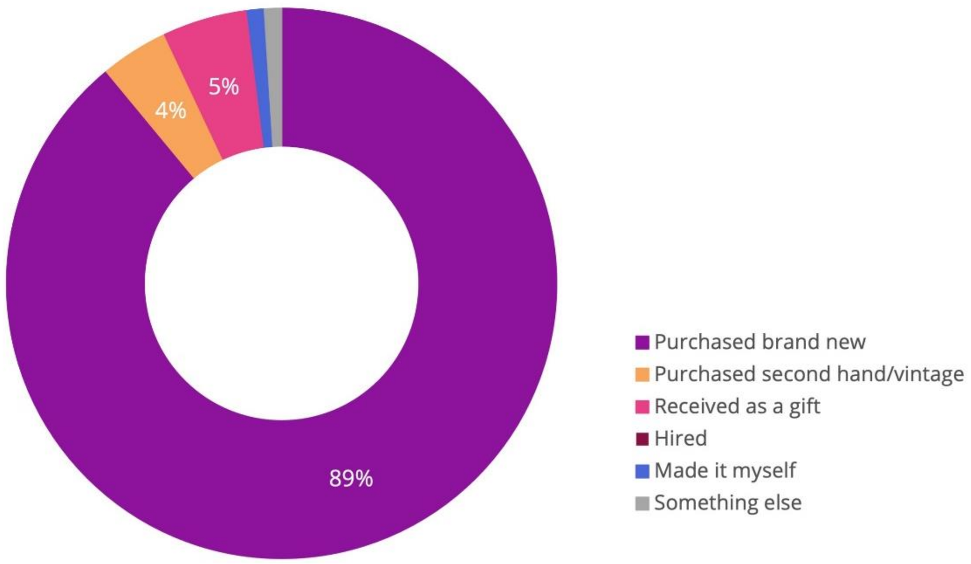
1.2 Acquisition route

Close to nine in ten UK citizens (89%) purchased their item of home textiles brand new (Figure 2). By contrast, the second hand/vintage market is a much smaller acquisition route, accounting for one in twenty-five (4%) of the items reported in the study. This compares to 10% of all clothing items in the prior clothing longevity study. One in twenty (5%) received the item as a gift, while small proportions either said they made it themselves (1%) or 'something else' (1%).

Acquisition brand new is most evident for duvets (95%), pillows (94%) and bed sheets (93%). It is marginally less prominent for fabric curtains/blinds (81%), cushion covers (81%) and rugs (84%), where second hand/vintage purchases as well as gifts from others make up somewhat of a greater share of the acquisitions.

Figure 2. Acquisition route

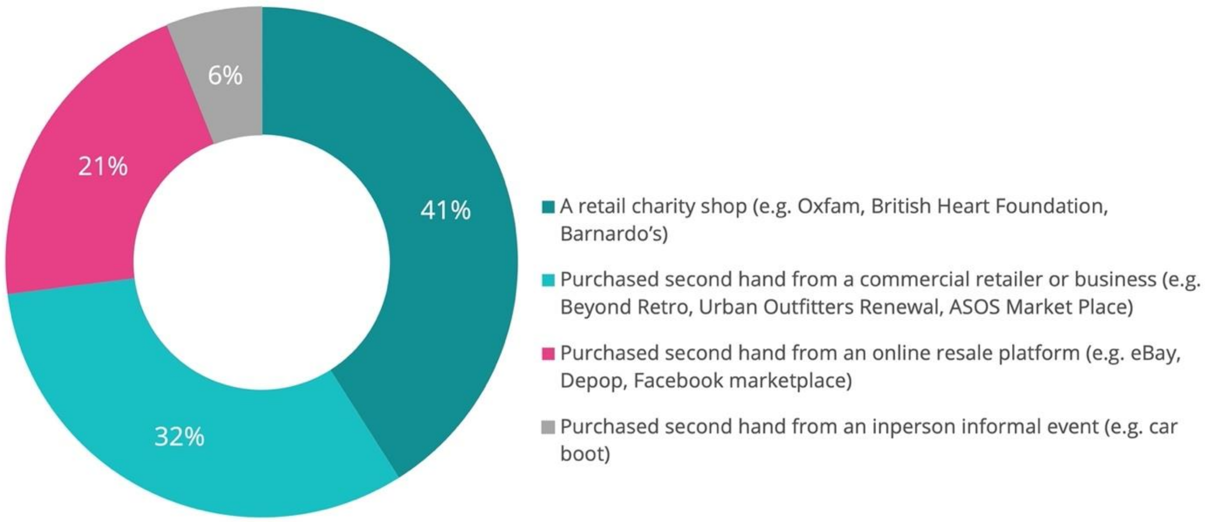
Q. You said that you have responsibility for deciding which [ADD ITEM] to purchase. Please think now about the item that you acquired most recently [IF BEDSHEET/DUVET COVER/PILLOW/DUVET: for your own bed]. How did you acquire it?
Base: 4,008 responses, with every respondent (2,004) answering about two categories of home textiles. September 2022



Among those who did purchase the item second hand/vintage (n=154), close to two in five purchased it at a retail charity shop (Figure 3). This is followed by around one in three (32%) who did so through a commercial retailer and around one in five (21%) through an online resale platform.

Figure 3. Second hand/vintage purchase route

Q. You said that you acquired the [ADD ITEM] second hand/vintage. Where did you get it from?
Base: 154 UK citizens who purchased one of the home textiles items they answered about second hand/vintage. September 2022



Close to two in three (65%) of the items were acquired in store, most notably bathroom towels (76%). By contrast, just over one in three (35%) were acquired online, most notably rugs (41%) and fabric curtains/blinds (40%). This is very similar to the share of purchases of clothing in the previous clothing longevity study (69% in store compared to 31% online).

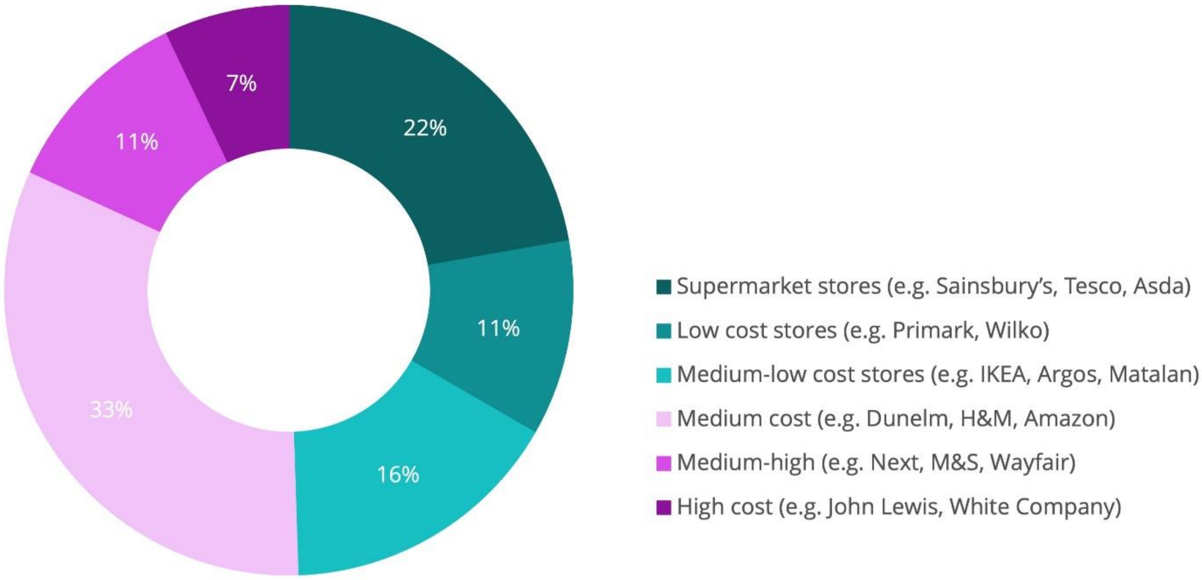
1.3 Category of store

The home textiles reported in the survey were acquired from a wide range of brand-retailer channels[4] (Figure 4). One in three (33%) purchased their item from a "medium cost" store, followed by acquisition at a supermarket (22%). Close to one in five (18%) were acquired at a medium-high or high-cost store.

[4] Prior to the main survey, WRAP undertook research with a sample of 2,000 UK citizens to understand how they would classify a range of retailers/brands on this scale. This then informed which examples were used in the survey to exemplify the categories.

Figure 4. Store acquired from

Q. From which of the following kinds of stores was this item acquired?
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. Base sizes in brackets. September 2022



2.0 In-use behaviours

2.1 Cleaning method

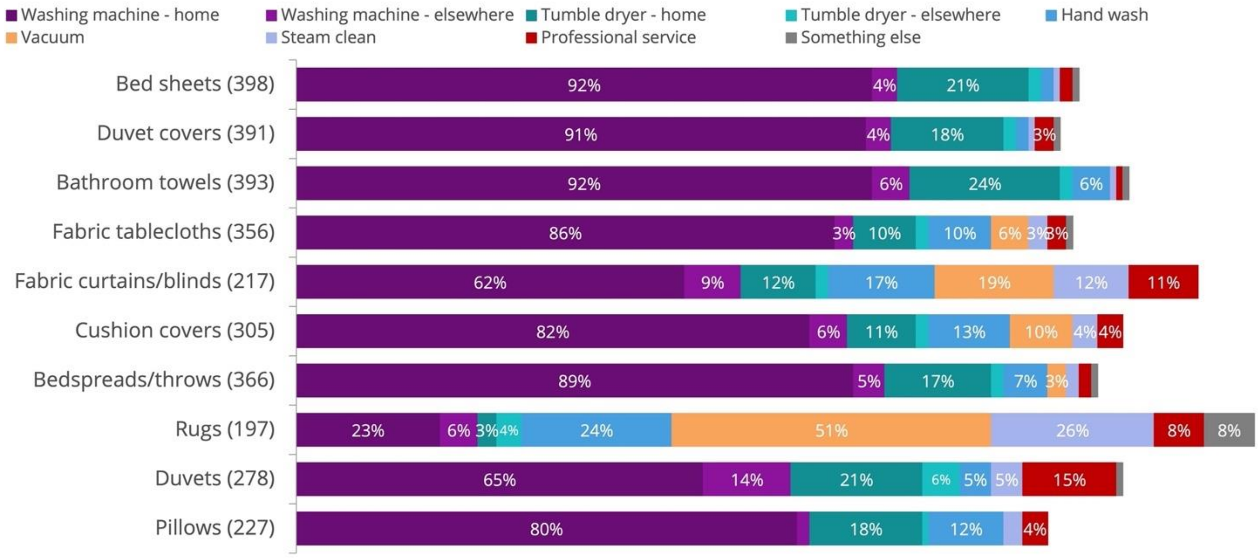
The research highlights that washing and drying methods vary considerably across the home textiles (Figure 5). Domestic washing machines are prominent for many, including bed sheets (92% report regularly washing these in a washing machine at home), bathroom towels (92%), duvet covers (91%), bedspreads/throws (89%) and fabric tablecloths (86%). Fewer, although still over half, wash duvets (65%) and fabric curtains/blinds (62%) in their home washing machine, falling to just less than one in four (23%) for rugs.

A professional cleaning service is rarely used for items such as bed sheets, duvet covers and bathroom towels, but is more prominent for duvets (15% regularly use this for this item), fabric curtains/blinds (11%) and rugs (8%). Likewise, steam cleaning is rarely used for some items but significant for rugs (26%) and fabric curtains/blinds (12%).

Tumble drying at home is cited by around one in five UK citizens, depending on the item (with 24% using this for bathroom towels and 21% for both bedsheets and duvets).

Figure 5. Cleaning and drying methods

Q. Which of the following cleaning methods do you regularly use for this? Please select all that apply.
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. Base sizes in brackets. NB. the data adds to more than 100% because the washing and drying methods are not mutually exclusive.



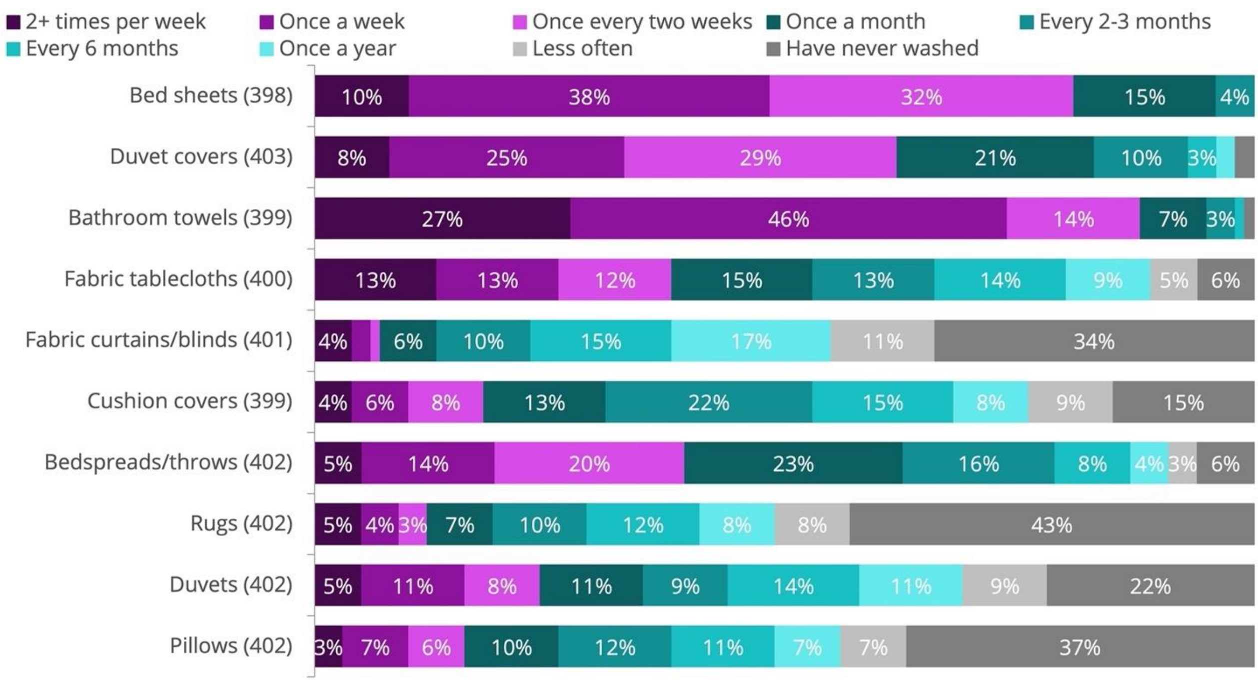
2.2 Wash frequency and temperature

The research highlights that wash frequency varies considerably across different items of home textiles (Figure 6). Fabric curtains/blinds are the item with the lowest average wash frequency (0.8 washes per month), followed by rugs (1.2) and pillows (1.3). Average wash frequency is highest for bathroom towels (6.0 washes per month), followed by bed sheets (4.2).

There are some significant differences by sub-groups, with wash frequency much higher among 18-34s, higher income households and households with children living at home. There is also a correlation between wash temperature and wash frequency, with those washing at higher temperatures (50 degrees or higher) also washing home textiles at a higher frequency.

Figure 6. Wash frequency

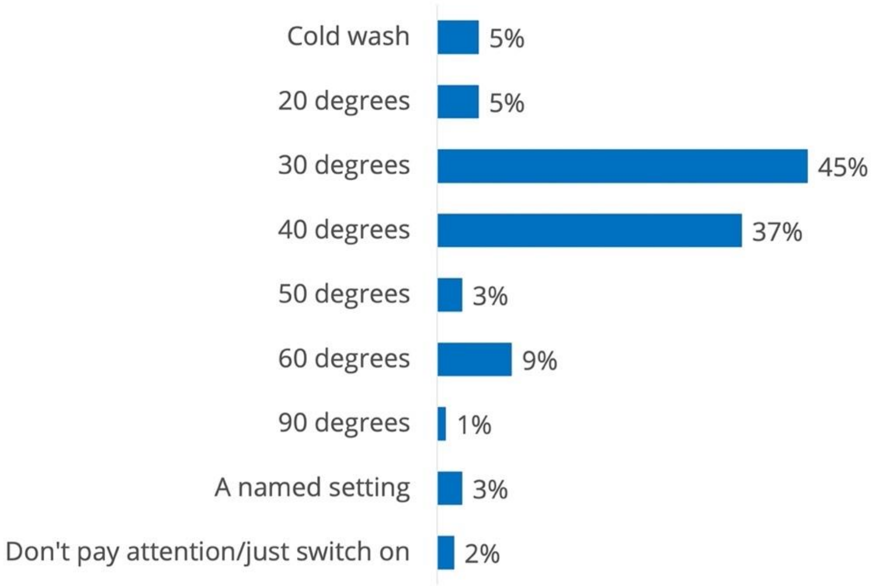
Q. How often do you wash this [ADD ITEM]? Your best estimate is fine.
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. Base sizes in brackets. September 2022



On wash temperature, 30- and 40-degree washes are dominant - regularly used by 45% and 37% of UK citizens, respectively (Figure 7). Close to one in ten (9%) regularly use a 60-degree wash, which is more frequently cited for bathroom towels (15%), bed sheets (11%) and duvet covers (11%)

Figure 7. Wash temperature

Q. When you wash this [ADD ITEM], which wash temperatures do you regularly use? Select all that apply.
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. Base sizes in brackets. September 2022



The research highlights that the use of additional laundry products is high. Among those who wash the item of home textiles in the washing machine, two in three (67%) use laundry conditioner[5]. This is relatively consistent across all the home textiles items looked at in this study. Furthermore, one in five (20%) regularly use stain removal products.

2.3 Repair

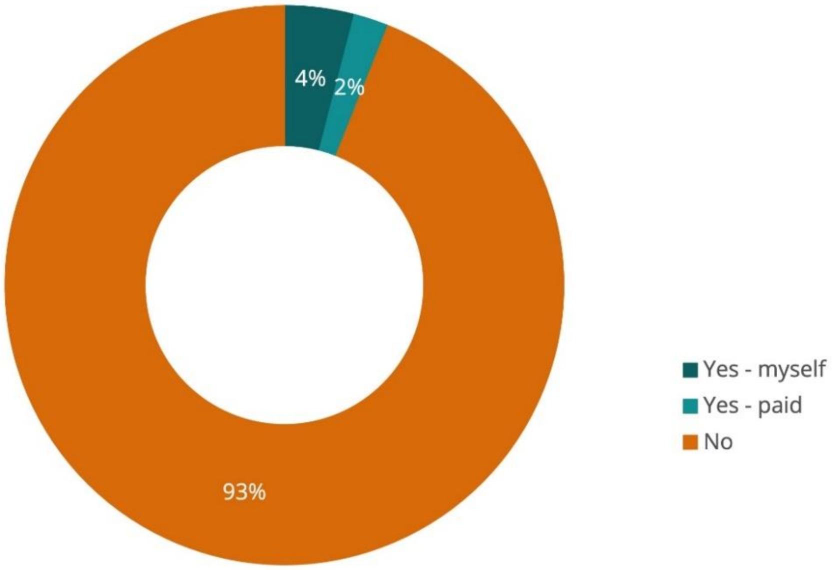
Reported levels of repair of home textiles are very low (Figure 8). Around one in fourteen (7%) say they have repaired the item they answered about, either themselves (4%) or through a paid service (2%). This is consistent across all of the home textiles. It is also notably lower than the level of repair established for clothing in the previous clothing longevity study (22% of items were subject to a repair - 13% by the owner themselves and 9% through a paid service).

Figure 8. Levels of repair

[5] Fabric softeners are generally not recommended to be used with products with high moisture-wicking & absorption property important for products like towels, bedlinens as over time they build a layer, making it harder for water and detergent to permeate the fabric, effecting the durability in the long run. As well as the 'fragrance' in the softeners are essentially chemical polluting the wastewater stream.

Q. Has the [ADD ITEM] been repaired, either by yourself or a professional service?

Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. September 2022



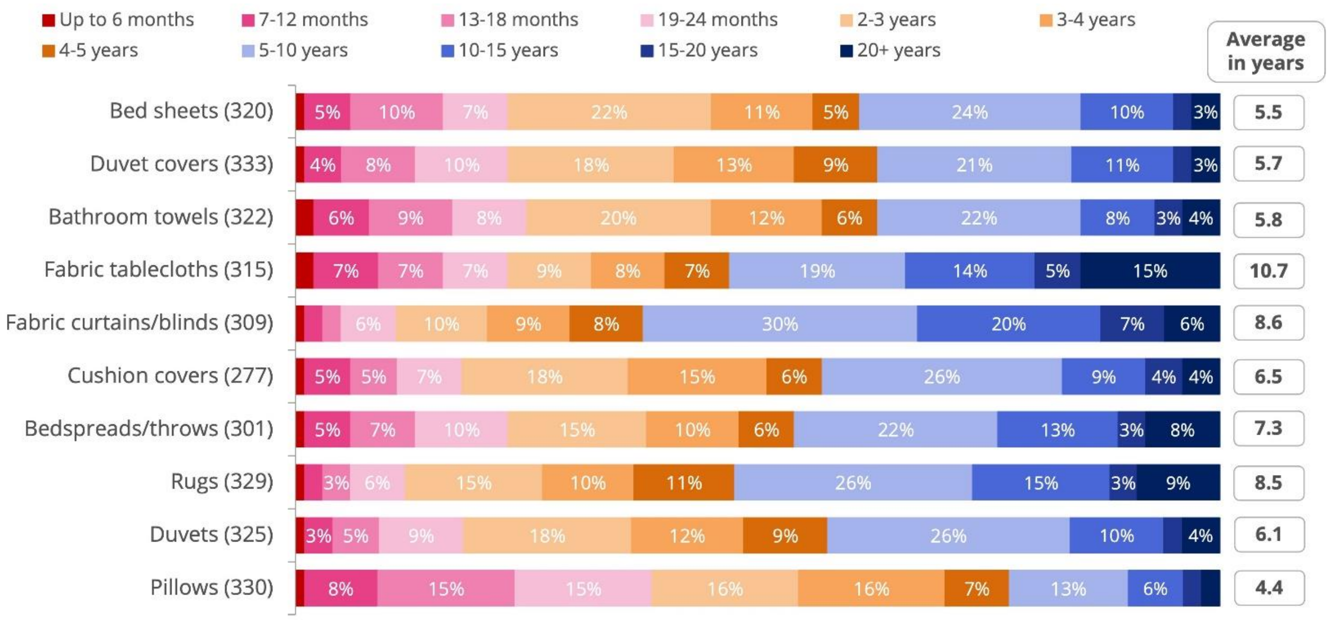
3.0 Home textiles longevity

Estimated longevity is calculated as the sum of the amount of time since respondents acquired the item and the anticipated amount of time they think they will continue to use it (Figure 9). The combined overall longevity estimate for home textiles is 6.9 years, compared to 4.3 years for clothing[6]. However, the average masks a wide variation across individual items that ranges from fabric tablecloths (10.7 years) and fabric curtains/blinds (8.6 years) through to bedsheets and pillows (5.5 and 4.4 years, respectively).

In addition to the overall average, the range of responses is also notable – with a significant proportion of UK citizens in the survey predicting notably shorter longevities of up to 18 months. This is particularly evident for pillows (39% of UK citizens estimate these will last up to 18 months), bathroom towels (25%), bedspreads/throws (23%) and duvet covers (23%).

Figure 9. Estimated home textiles longevity, in years

Q. How long ago did you acquire this [add item]? Your best estimate is fine.
Q. And how much longer do you think you will continue to use this [add item]? Your best estimate is fine.
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. Base sizes in brackets. September 2022



There are some notable differences in estimated longevity according to demographic sub-groups as well as how the item was purchased and used in the home. For example:

- Acquisition type: items purchased second hand/vintage have a *lower* estimated longevity than items purchased new: 5.6 years compared to 6.5 years. This is the opposite of the trend observed in the clothing longevity study, where second hand/vintage acquisition was

[6] https://wrap.org.uk/resources/report/citizen-insights-clothing-longevity-and-circular-business-models-receptivity-uk

correlated with increased longevity (5.4 years compared to 4.0 years if purchased second hand/vintage). Items that are acquired as gifts have a higher estimated longevity of 10.6 years.

- Repair: those who have undertaken a repair on an item of home textiles report a *lower* predicted lifespan – 4.3 years compared to 7.1 years among those who have not undertaken a repair. This is the opposite of the trend observed in the clothing longevity study, where undertaking a repair was estimated to add 1.3 years to the life of a garment, on average.
- Wash frequency: there is a very strong relationship between wash frequency and predicted longevity. Those who wash their home textiles item 2+ times per week estimate a longevity of 3.5 years, significantly lower than those who wash once per week (4.6 years), once per month (5.7 years), once every 2-12 months (8.6 years) or less often (9.9 years).
- Demographics: there is no association with gender (with men and women both reporting an average longevity of 6.9 years). However, there is a strong relationship with both age and income. For example, 18-34s reported an average longevity of 4.9 years, compared to 6.4 years among 35-54s and 8.8 among those aged 55+. And those with a household income of more than £40,000 per year estimate 5.7 years, compared to 7.8 years among those with a household income of less than £20,000 per year.
- Brand/retailer mix: there is some association with the type of brand/retailer where the item was purchased, with longevity estimates higher for items purchased from medium and higher cost brands/retailers (6.7 years) compared to lower cost retailers/brands (5.7 years).

4.0 Ownership and End of life

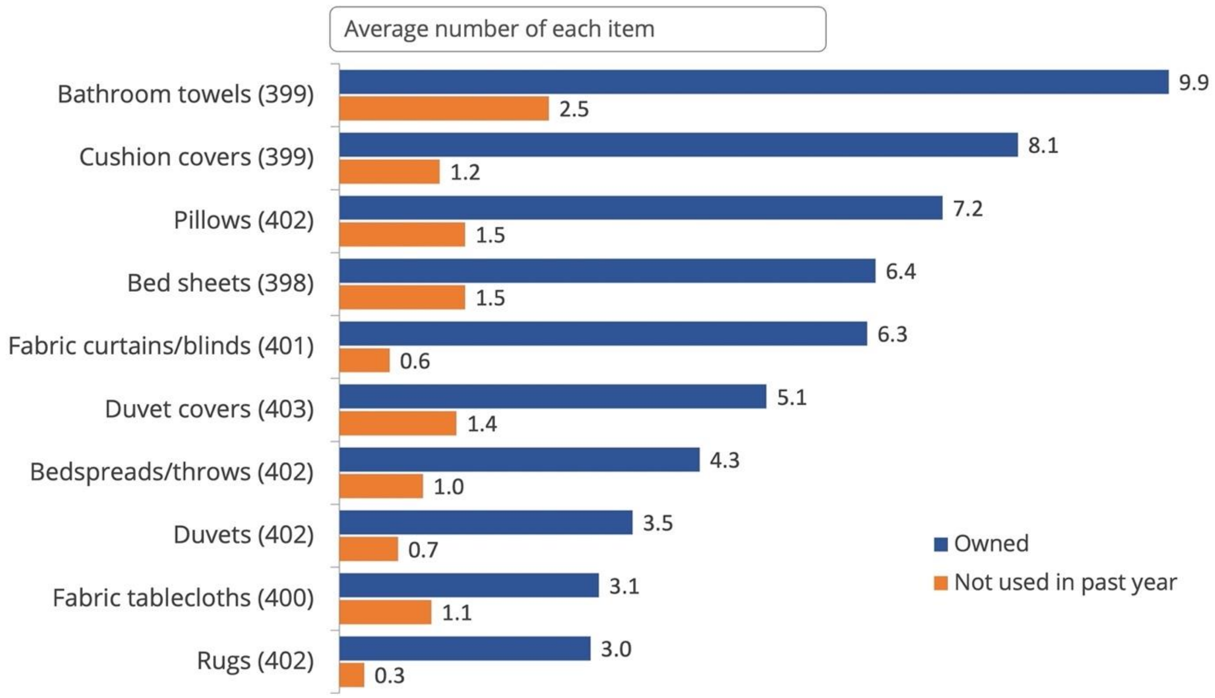
3.1 Items owned but not in use

UK citizens report ownership of an average of 56.9 items of home textiles (across the items in the study). This includes 9.9 bathroom towels, 8.1 cushion covers, 7.2 pillows and 6.4 bed sheets (Figure 10).

On average, 11.8 of these items have not been used in the past year. This represents just over a fifth (21%) of home textiles in a typical UK home. There are notable variations across individual items, with fabric tablecloths and duvet covers the items most likely to be owned but not used in the past year (35% and 27%, respectively). Utilisation is higher for items like rugs (10% were not used in the past year, on average), fabric curtains/blinds (10%) and cushion covers (15%).

Figure 10. Items owned but not in use

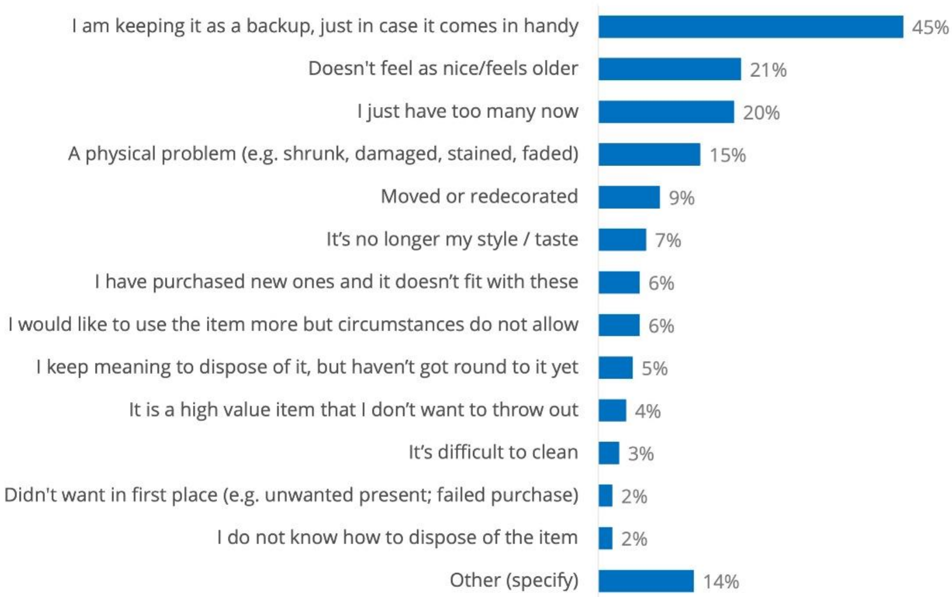
Q. Now thinking more generally about ALL the [ADD ITEM] that you have in your home (not just the specific item you have been answering about until now). How many [ADD ITEM] do you own? Your best estimate is fine. When answering the question please consider all items that you own, even if not currently in use?
Q. How many of these [ADD ITEM] have you not used in the past year?
Base: UK adults who were allocated to each home textiles category by a least fill method (base sizes in brackets). September 2022



Respondents were additionally asked why they had not used these items in the past year (Figure 11). This highlights that the main reason is keeping it as a spare or backup (cited by 45%). This is the most frequently cited reason for all the home textiles, with the exception of rugs (where it is the second most cited reason). This is followed by a perception that it is no longer as nice, either because it “doesn’t feel as nice” or “feels older” (21%), as well as owning too many of this item (20%). By contrast, a specific problem with the item (e.g. damage, stains, fading) is cited less frequently (15%) – indicating that non-use is driven more by perceptions than product failure.

Figure 11. Reasons for not using home textiles items in the past year

Q. You said that you own but have not used one or more [ADD ITEM] in the past year. Please think about one of these items and select the reason(s) why you have not used it recently. Select all that apply
Base: 1,572 UK adults who own each of these items and did not use at least one of them in the past year. September 2022



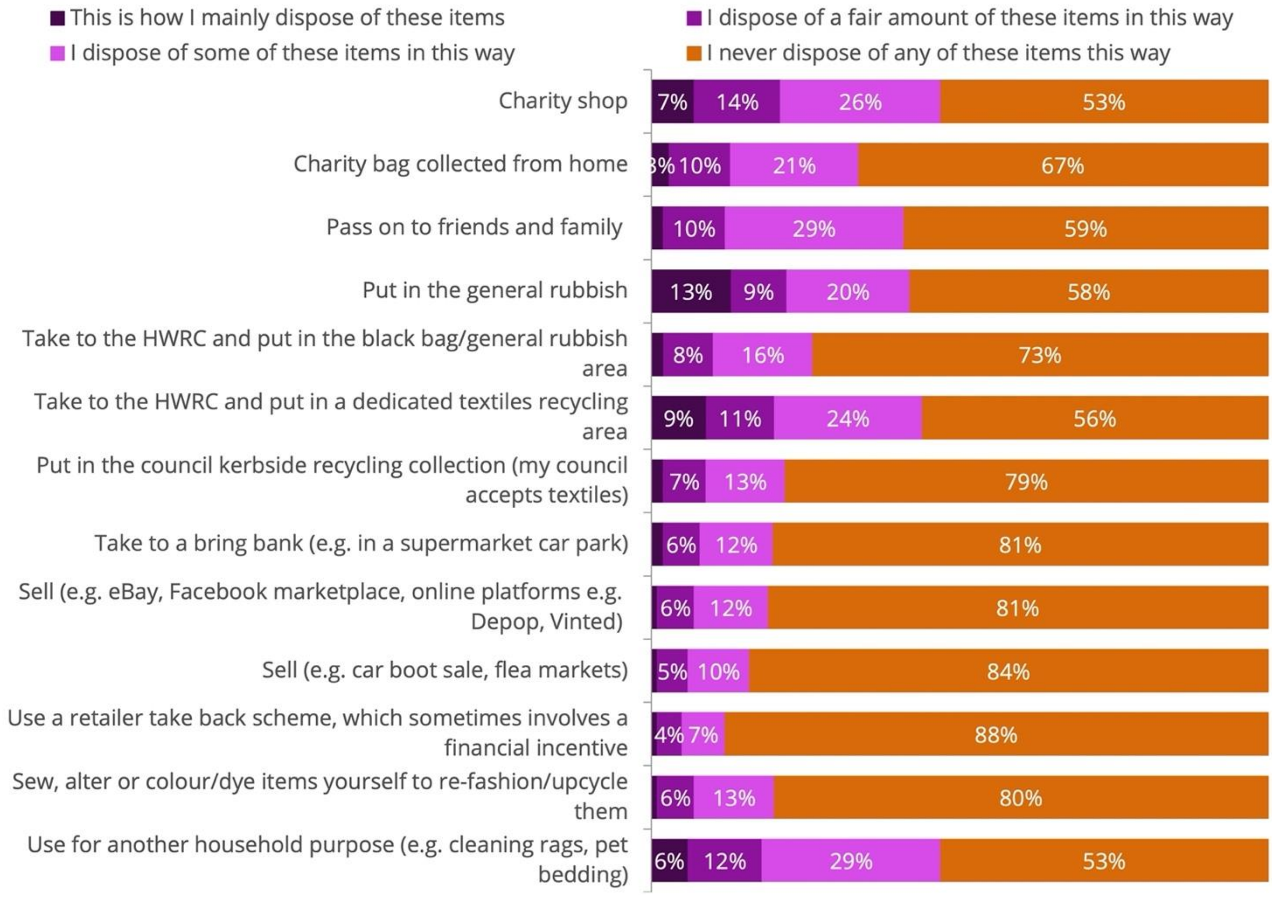
3.2 Disposal routes

The research highlights a variety of disposal routes for home textiles, which are often specific to individual items (Figure 12). Collectively, the most frequently used disposal route is the general rubbish (22% say they "mainly" dispose of items this way or dispose of a "fair amount" of items this way). This is closely followed by charity shops (21%), a dedicated recycling area at the HWRC (20%) and repurposing the item for another use in the home, e.g., cleaning rags, pet bedding (18%).

By contrast, fewer report regularly using retailer take back schemes (5%), selling home textiles in person e.g. car boot sale (6%) or selling them online e.g. eBay, online platforms and marketplaces (7%). Less than one in ten report regularly using a kerbside recycling collection (8%) or taking household textiles to a bring bank (7%).

Figure 12. Disposal routes – all

Q. When you have [ADD ITEM] that you no longer want and need to dispose of it, to what extent do you use the following
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. September 2022.



At the level of individual items of home textiles (Figure 13), the general rubbish is the dominant disposal route for pillows and duvets (37% and 26%, respectively, say they regularly use this for these items). It is also prominent for bathroom towels (25%) bed sheets (24%).

By contrast, charity shops are the main disposal route for fabric tablecloths (used regularly by 30%), bedspreads/throws (28%), fabric curtains/blinds (28%), cushion covers (27%) and duvet covers (25%). Repurposing the item for another household use is a key disposal route for bathroom towels (cited by 39%), bed sheets and tablecloths (both 27%).

Figure 13. Disposal routes – by item

Q. When you have [ADD ITEM] that you no longer want and need to dispose of it, to what extent do you use the following
Base: UK citizens who currently own and have purchase decision-making responsibility for two or more home textile categories, randomly allocated to two of the categories using a least fill. September 2022

	Bed sheets (398)	Duvet covers (403)	Bathroom towels (399)	Tablecloth (400)	Curtains/ blinds (401)	Cushion covers (399)	Bedspreads/ throws (402)	Rugs (402)	Duvets (402)	Pillows (402)
Charity shop	16%	25%	13%	30%	28%	27%	28%	21%	13%	9%
Charity bag	13%	17%	10%	17%	14%	16%	14%	11%	9%	7%
Pass on to others	8%	10%	8%	16%	17%	13%	15%	18%	7%	9%
General rubbish	24%	22%	25%	19%	15%	19%	16%	16%	26%	37%
HMRC – black bag	10%	7%	8%	12%	13%	8%	10%	13%	15%	11%
HMRC – recycling	17%	16%	19%	16%	25%	19%	19%	24%	25%	22%
Council collection	10%	8%	10%	9%	10%	10%	7%	8%	10%	8%
Bring bank	10%	11%	9%	10%	7%	8%	10%	6%	7%	4%
Sell online	5%	4%	4%	11%	12%	8%	9%	11%	4%	5%
Sell (e.g. car boot)	6%	5%	5%	8%	7%	6%	5%	6%	5%	3%
Retailer take back	3%	4%	4%	7%	5%	5%	3%	6%	5%	4%
Upcycle yourself	7%	7%	5%	11%	9%	8%	8%	5%	5%	5%
Repurpose	27%	17%	39%	27%	13%	13%	17%	10%	14%	9%

5.0 Conclusions and Opportunities

This report makes an important contribution to the evidence base and establishes a clear 'state of play' for home textiles. It helps understand the textiles' active life at home and informs the development of circular business guidelines.

The combined overall longevity estimate for home textiles is 6.9 years, although there is a lot of variation across individual items predicting notably shorter longevities of up to 18 months, according to our research.

UK citizens report ownership of an average of 56.9 items of home textiles (across the items in the study); of which, on average, 11.8 items have not been used in the past year.

Our findings identify clear associations of longevity with key behaviours which translate to opportunities that can be utilised to intervene. For example, there is a strong relationship between longevity and wash frequency - the more items are washed the shorter their longevity. Opportunities from the home textile sector to create better care behaviours with customers can increase longevity. To change this behaviour, brands and retailers also need to understand the consumer perceptions to the specific home textiles item and their perceived longevity.

There is also a correlation between wash temperature and wash frequency, with those washing at higher temperatures (i.e. 50 degrees or higher) also washing home textiles with higher frequency which could also lead to failure mode i.e. 'doesn't feel nice/feels older' as the more you wash and the more additional products you use, the older it will feel as the fibres will break down quicker.

When it comes to the main reasons for disposal, they vary depending on category but in general higher proportion going in the general rubbish bin than clothing. Perhaps this is linked to the perception that no one would want to buy second hand bed linen or towels. Recycling or donating these items should be encouraged, however, at the same time encouraging the purchase of second hand home textiles second hand by further understanding the association with longevity.

Price is the key purchase factor whereas sustainability is low on the agenda. Additionally, durability as a purchase motivation varies depending on categories but is generally further down the motivation list. However, it is an opportunity to encourage citizens to consider durability when purchasing - better value for money if you can use it for longer.

The survey also demonstrates that desirable behaviours for home textiles lag the equivalents for clothing. For example:

- there is a small size of the second hand/vintage market as the vast majority of home textiles are acquired brand new – there is also a reverse association of second-hand items and longevity compared to clothing
- there is very low level of repair – again that is lower compared to the clothing research

- there is a weakness of sustainability considerations as a purchase factor

There are opportunities for brands, retailers and manufacturers to make important circular design decisions. For example:

Products like bedsheets, bathroom towels should be designed for recyclability as they have long expectancy, high ownership with high frequency of wash, are generally repurposed, and are not directed towards second hand route.

For products like pillows, duvet covers, tablecloth, curtains, cushion covers, bedspread/throws, rugs, and duvets they have relatively higher life expectancy, with a generally trend of disposing it to charity shops (except- duvets, pillows). In the case of pillows and duvets, they land in general rubbish and their complex construction making it difficult to recycle. Hence, these categories lean towards designing for durability.

What's next?

- Insights on predicted longevity of different home textiles categories, wash frequency, acquisition routes, usage, purchase motivation, and reasons for not using the products will help Textiles 2030 direct businesses towards the right design decisions to help extend the life of home textiles in UK.
- There is a lot of variation in findings across the home textiles items (e.g. in terms of perceived durability, longevity, aftercare and disposal routes). Any guidance/business model should be specific to the product type.
- Encouraging citizens to take care of the home textiles with repair and better in-use care instructions will be key behaviour to focus on for Textiles 2030.
- There is a significant scope to support and motivate citizens to reuse home textiles, if in good condition donate for resale but at all costs avoid putting it in the bin. However, resale would also require a big shift in citizens openness to buying home textiles second hand that needs to be addressed. Nevertheless, home textiles are a valuable resource, if it cannot be reused or resold it will still make good feedstock for recycling.
- There is a significant opportunity for home textiles retailers and the reuse and recycling sector to adopt home textiles collection options/take back schemes, as currently consumers are unsure on their home textiles disposal routes.
- There is a potential to bring higher proportion of unused home textiles into active use by building awareness, as the non-use is driven less by product failure and more by perceptions.
- There are opportunities for brands and retailers to reduce the impact home textiles has on the environment by designing for circularity in key product categories. However, considerations need to be made to understand how this can be done for certain home textile products.
- Finally, there is an opportunity to build a market for circular business models within home textiles, encouraging businesses to move from selling a product to selling a concept change.

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