Uncovering Key Consumer Insights

Circular Communities Scotland

Understanding the thoughts and feelings of consumers around Scotland on share and repair community projects

Prepared by Multiply

1000 person survey geographically split across Scotland
Demographic Distribution

Geographic (where we surveyed)

- Aberdeen City/shire (9%)
- Dundee & Angus (5%)
- Argyll and Bute (2%)
- Falkirk, Clackmannanshire and Stirling (6%)
- Dumfries and Galloway (3%)
- Ayrshire (7%)
- Dunbartonshire (4%)
- Lothian (East, West, Mid) (7%)
- East Renfrewshire/Renfrewshire (5%)
- City of Edinburgh (9%)
- Islands (Na h-Eileanan Siar, Shetland, Orkney) (1%)
- Fife (7%)
- Glasgow City (11%)
- Highland (4%)
- Inverclyde (2%)
- Moray (2%)
- Lanarkshire (11%)
- Perth and Kinross (3%)
- Scottish Borders (2%)

Age Distribution

- 18-24 (12%)
- 25-34 (26%)
- 35-44 (25%)
- 45-54 (20%)
- 55-65 (17%)
- 65+ (1%)

Socio-demographics

- Male (40%)
- Female (60%)
- C1 (26%)
- C2 (19%)
- B (23%)
- A (8%)
- E (12%)
- D (12%)
- 18-24 (12%)
- 25-34 (26%)
- 35-44 (25%)
- 45-54 (20%)
- 55-65 (17%)
- 65+ (1%)
Repair Projects
If an item of yours were broken, how likely would you be to look to repair it before buying new?

- Every time (14%)
- Nearly all the time (30%)
- Often (35%)
- Rarely (19%)
- Never (1%)

Where would you seek information about how to repair specific items?

- YouTube (69%)
- Family (55%)
- Online (55%)
- Friends (47%)
- Someone who specialises in that product (38%)
- A specialist repair store (27%)
- Social media (19%)
- A community repair project (8%)
- Specialist literature (3%)

Have you heard of any community projects where you can take items to be repaired?

- Yes (22%)
- No (70%)
- Unsure (8%)

PROMPTED

- Yes (30%)
- No (60%)
- Unsure (10%)

In general there is a willingness to try and repair items (44%) of people try to fix and item either every time or nearly all of the time. This demonstrates a desire to repair items however only 22% unprompted and 30% prompted where aware of repair projects. Perhaps showing this desire to repair, if there was a greater emphasis on project awareness then people would be likely to visit.

Interestingly 69% of people would consult YouTube for tutorials on repairing items, perhaps if repair projects created small pieces of video content on common repair tips it would increase knowledge and confidence then in turn awareness about repair projects.
Which items would you consider repairing rather than buying new?

- Small electrical items: 57%
- Clothing & Fabrics: 55%
- Furniture: 55%
- Car/ machinery: 51%
- Jewelery: 47%
- Bicycles: 47%
- White goods: 41%
- Tools/ garden items: 40%
- Toys/ children's items: 33%
- Soft furnishings: 28%
- Footwear: 25%

We can see there is a broad range of items people will try and repair, this demonstrates a willingness to try and repair items.

There are elements that perhaps due to cost may likely be thrown away or not, the rise of fast fashion may lead to people throwing out clothing or footwear, however more expensive items such as jewellery and furniture will either need to be repaired by a professional or kept.

Given 57% of people would look to try and repair small electrical items and yet 45% have thrown them out indicates that perhaps they were unsuccessful in repairing these types of items. If projects focused primarily on items that are difficult to repair it would fulfil a customer need.

In the past 6 months, which of these items have you thrown away when they were broken?

- Clothing & Fabrics: 51%
- Footwear: 48%
- Small electrical items: 45%
- Toys/ children's items: 25%
- Games (board and electrical): 15%
- White goods: 14%
- Tools/ garden items: 12%
- Furniture: 12%
- Jewelery: 12%
In your opinion who are repair projects for?

- Everyone and anyone: 83%
- People on a tight budget: 24%
- People who want to be involved in community: 22%
- People who want to learn new skills: 21%
- Old people/retired: 18%
- People who are skilled in craftsmanship: 18%
- Environmentalists: 15%
- Young people: 12%
- Students: 12%
- Young families: 12%
- Sociable people: 11%
- Hipsters: 7%
- People with more money: 6%

What would prompt you to visit a repair project?

- To save me money: 73%
- To fix my items: 68%
- To help the environment: 44%
- To combat wastage: 44%
- To learn and new skill: 33%
- To meet new people: 21%
- Feeling of reward/self satisfaction: 21%
- To be part of their community: 19%
- To impart knowledge: 12%
- Fun: 11%
- Artistic pleasure: 7%
- Want to be part of the buzz: 4%
- Seen it on social media/tv/radio: 3%
What would put you off visiting/ using a repair project?

- Location too far away: 46%
- Poor opening times: 37%
- Intimidation of feeling useless with skills knowledge: 34%
- Concerns over repair quality if done by volunteers: 23%
- Space isn't a nice environment: 22%
- Lack of parking/accessibility: 20%
- Safety concerns: 20%
- Doesn't feel like it's for me: 17%
- Takes too long to repair when I can just buy new: 15%

Have you ever used a community repair project before?

- Yes (9%)
- No (90%)
- Unsure (1%)

REPAIR PROJECTS ARE FOR EVERYONE, BUT MOST HAVE NEVER BEEN

Our respondents agree that these types of projects are for all sorts of people, however only 9% of people have ever visited one.

When asked why they wouldn't visit, generally the answers were pretty generic such as the location being too far away and poor opening times, however 34% of people said they would experience intimidation of feeling useless due to lack of knowledge, this is a specific emotional limitation. Perhaps projects could break down this barrier by using friendly welcoming messaging or producing social content that provides tutorials or useful tips/hacks to stimulate positive thinking.

Respondents would visit repair projects to save them money, this is especially important during a cost of living crisis.
Sharing Projects
If you were in need of an item you didn’t own, how often would you consider borrowing it from someone or somewhere first?

- Every time (5%)
- Nearly all the time (10%)
- Often (29%)
- Rarely (45%)
- Never (11%)

Who would you be likely to borrow an item from?

- Family (81%)
- Friends (64%)
- Neighbour (25%)
- Work colleague (20%)
- Hire service (12%)
- A community sharing project (5%)
- Someone in the community (5%)

Have you heard of any community projects where you can borrow or loan items?

- Yes (23%)
- No (70%)
- Unsure (7%)

Whilst people are keen to repair items, in general there is a reluctance to borrow items, only 15% of people said that every or nearly all the time they would consider borrowing items from others.

The most likely people they would borrow from would be friends and family, this is likely due to a reluctance to borrow from people they don't know as well - this is a trust issue.

More people are aware or borrowing projects than repair projects both prompted and unprompted.
In your opinion who are sharing projects for?

- Everyone and anyone: 84%
- People on a tight budget: 28%
- People who want to be involved in community: 27%
- People who want to learn new skills: 21%
- Old people/retired: 20%
- Environmentalists: 16%
- Young families: 15%
- Young people: 15%
- Students: 15%
- Sociable people: 13%
- Hipsters: 7%
- People with more money: 5%

What would prompt you to visit a sharing project?

- To save me money: 70%
- To help the environment: 44%
- To borrow an item for one-off usage: 38%
- To combat wastage: 36%
- To try something out: 36%
- If I couldn't justify the cost of buying new: 35%
- To meet new people: 22%
- To be part of the/their community: 20%
- Upcoming event caught my eye: 10%
- I have seen events and activities they have run in the past: 7%
What would put you off visiting/using a sharing project?

- Location too far away: 48%
- Poor opening times: 41%
- Feels dirty/unclean: 40%
- Not knowing what items there are to borrow: 37%
- Nervous about breaking items: 23%
- Lack of parking/accessibility: 21%
- Doesn't feel like it's for me: 20%
- Costs too much to get involved: 19%
- Uncertainty of how to use items/lack of instructions: 16%

Have you ever used a community sharing project before?

- Yes (8%)
- No (91%)
- Unsure (1%)

BORROWING PROJECTS ARE FOR EVERYONE, BUT MOST HAVE NEVER BEEN

Again, our respondents agree that these types of projects are for all sorts of people, however only 8% of people have ever visited one.

When asked why they wouldn't visit, generally the answers were pretty generic again however they also mentioned about the projects feeling dirty and unclean and also being unaware of inventory of the projects. Perhaps a more transparent approach would open the doors and minds to using the projects.

Finally, we know people tend to borrow less which will mean they are buying or doing without, given people would visit a project to save money (70%) messaging around cost saving would be advantageous.
General
What information would make you interested in visiting these projects?

- 58%: If there was a list of things that can be fixed
- 56%: Cost savings it might bring me
- 45%: Types of items on offer
- 42%: When and where it is on
- 42%: How much it costs
- 42%: What benefits it brings to me
- 41%: Types of skills you can learn
- 40%: How to use the service
- 38%: What benefit it brings to the environment
- 37%: How long I can borrow an item for
- 32%: What benefit it brings to the community
- 15%: Types of people who visit

Respondents crave lots of information, be it a list of things that can be fixed or how much money they will save. Across the board there was a desire for information on a broad range of subjects. Our customers are curious info seekers, projects should look to dial in on this curiosity by being open, transparent and knowledgeable. They need both practical information such as inventory and timings, but also emotional elements such as benefits and skills.
Which of these elements do you feel would be a benefit of using share or repair projects?

- Saving money: 65%
- Learning new skills: 55%
- Breathing life into old goods: 52%
- Helping the planet: 50%
- Satisfaction of doing good: 44%
- Maintaining and caring for things I love: 41%
- Meeting new people: 39%
- Gaining confidence: 33%
- Finding a hobby: 29%
- Feeling creative: 28%

What would make you more likely to visit a share or repair project?

- If it were local: 60%
- If I was on a tight budget (cost of living crisis): 50%
- If I was aware it existed: 47%
- If I could see a proven cost benefit: 42%
- If it was easily accessible: 38%
- If you know items availability: 33%
- Knowing I can borrow for how long I need it: 32%
- If I were made to feel welcome: 31%
- If it was for a common good: 27%
- If I knew other people who used it: 26%
- If I could get advice on how to use the item safely: 17%
- If I can park: 16%
- If the space was appealing: 14%
- If I was made aware of the consequences of buying new for the environment: 13%
- If there was a social space to hang out: 7%

*COST IS KING*

Above all cost is king, in these challenging times people are interested in saving money. By demonstrating real terms money saving value this could be an influencer in turning awareness to interest and interest to action.

People generally don’t see these projects as a place to hang out and socialise, its seen more as a practical service - given 40% of people would be put off visiting sharing projects due to the perception of being dirty, a more welcoming, clean and modern environment would be welcomed.
If you were to use these services how would you prefer to pay for their use?

- Pay per use (65%)
- Donation (27%)
- Monthly subscription (5%)
- Annual one off payment (3%)

How much would you be willing to pay per year to use these services?

- Less than £60: 56%
- £60-80: 16%
- £80-100: 12%
- £100-120: 9%
- £120-140: 2%
- £140-160: 2%
- £160-180: 1%
- £180-200: 2%
- £200+: 1%

Which of the below elements are important to you? (ranked in order)

1st: Cost Saving
2nd: Reducing environmental impact
3rd: Self improvement
4th: Quality of items
5th: Community
6th: Being independent
7th: Social interaction
8th: Being a conscientious consumer
9th: Consumer rights

PAY AS YOU GO

With cost being an important factor for our audience it’s little wonder that pay per use is the preferred payment method, likewise they want to pay as little as possible for the service.

In order for this to be an attractive proposition for the customer they must see a tangible cost benefit.

Perhaps a costing structure which allowed flexibility would appeal to people looking for a one off repair or loan.
<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The cost of living crisis would make me more likely to repair or replace</td>
<td>54%</td>
</tr>
<tr>
<td>Repairing/sharing is important to help our impact on the planet</td>
<td>50%</td>
</tr>
<tr>
<td>Buy cheap, buy twice</td>
<td>43%</td>
</tr>
<tr>
<td>I would be more likely to repair my products during the cost of living</td>
<td>42%</td>
</tr>
<tr>
<td>crisis</td>
<td></td>
</tr>
<tr>
<td>We have a right to repair our goods</td>
<td>42%</td>
</tr>
<tr>
<td>Learning a new skill is self fulfillment</td>
<td>42%</td>
</tr>
<tr>
<td>Older products are better quality</td>
<td>20%</td>
</tr>
</tbody>
</table>
Summary

Awareness

Levels of awareness of these types of projects are relatively low. Projects should look to drive awareness within local communities by engaging a variety of channels, from social media content to local on the ground advertising. There is a desire to repair items specifically however people are not aware these projects exist and what they do. This ideally starts at a local level, we know that there is a desire to repair, we know people will consult friends and family for repair tips, we also know when borrowing they borrow from friends and family. Likewise location of project and accessibility are important, therefore it makes sense to make a noise in local community and drive advocacy with those closest to home.

Cost

Above all cost is by far the most important element for customers today. During this cost of living crisis people are more aware of the cost of items. By driving awareness of the cost saving elements of borrowing or repairing it can really create a compelling reason to believe. Its about showing a monetary benefit to the consumer of using the service first and foremost. This could be in the form of pay per use, cost comparisons or money saving information.

Infolust

People crave information be that items that can be repaired or YouTube tutorials on how to do it. By creating compelling content and providing knowledge to the customers we can really drive awareness and affinity, breaking down barriers to participation.

Social Limits

Whilst there is agreement that these projects are for everyone, there is a lack of willingness to engage on more of a social element, its seen as more of a service than necessarily a social aspect. Whilst social elements such as the community are important for the masses its about a transactional relationship between service and customer for the most. This isn't necessarily a bad thing, it allows the project to be seen as more professional and normalization of consumerism. By making the spaces more appealing people may be more inclined to visit and spend time.

Get People Across the Line

There is a higher awareness of these projects than there are people who have ever been. We know there are real benefits people can see in using these projects however they are not currently doing it. By dialling up the benefits with the audience we can look to match a need to a benefit. This may be through raising awareness or by creating real advocates within the community. Likewise it may be dialling into seasonality and offering products that suit occasions i.e. Tennis equipment hire during Wimbledon etc...
Idea 1: Collaborate

Partner with local community initiatives in specialist areas, i.e. film clubs, charity cycles etc., to loan equipment or repair old or broken items. This is a good PR opportunity to get to the heart of many different people and drive awareness of your service. By providing or repairing equipment for good causes or community groups it gets your project front and centre with large groups of people and also cements your place in communities.

A discount could also be provided for community groups.

Idea 2: Cost Comparison

By demonstrating the cost comparison between buying and borrowing/repairing we can drive a remarkable price difference. By introducing elements such as price per use it would persuade people to see the waste of money they might have spent in buying an item they may use less.

Likewise by using free online marketplaces such as Gumtree or Facebook marketplace projects could advertise services for free as opposed to for sale.

Idea 3: Inventory

Many people are not aware of both the service but also the types of items they can borrow or repair. Projects could adopt a more transparent approach to demonstrating the breadth of items by having an online portal that demonstrates item availability or using tools such as social media/advertising/store windows to demonstrate.

Idea 4: Content

Consumers crave content right now, by having an interesting and practical content library, projects can become thought leaders and become trusted sources of information and in turn borrowing or repairing centres.

Idea 5: Carbon Counter

Environment is high on consumers minds, by demonstrating the environmental impact that borrowing or repairing has on the environment it can drive a good news story and feeling with people. Demonstrating the impact via a carbon counter that can be built into usage as if like a points card or loyalty scheme will build momentum.
OPENED YOUR EYES?

Feel free to get in touch:
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