

# **Uncovering Key Consumer Insights**

# Circular Communities Scotland



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

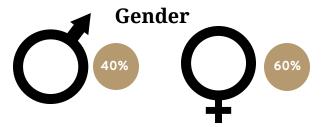
Prepared by Multiply

# **Demographic Distribution**

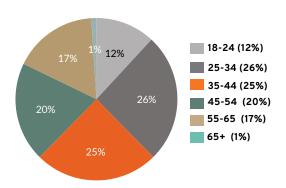
## Geographic (where we surveyed)



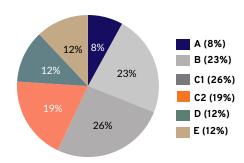
Aberdeen City/ shire (9%) Dundee & Angus (5%) Argyll and Bute (2%) Falkirk, Clackmannanshire and Stirling (6%) Dumfries and Galloway (3%) Ayrshire (7%) Dunbartonshire (4%) Lothian (East, West, Mid) (7%) East Renfrewshire/Renfrewshire (5%) City of Edinburgh (9%) Islands (Na h-Eileanan Siar, Shetland,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



## **Age Distribution**



# **Socio-demographics**



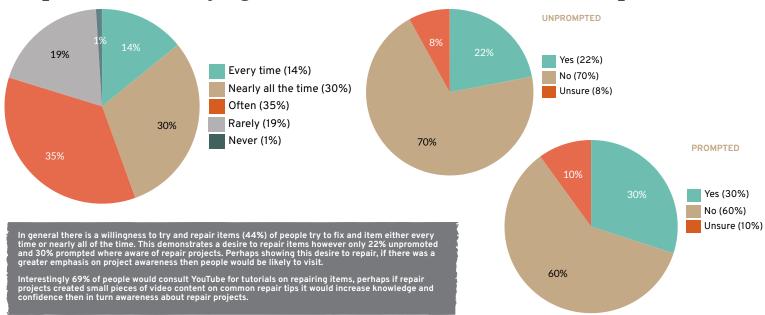
Male

Female

# Repair Projects

# If an item of yours were broken, how likely would you be to look to repair it before buying new?

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



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



YouTube



Family

55%



55%



Friends

47%



38%



27%









Online

Someone who specialises in that product

A specialist repair store

Social media

A community repair project

Specialist literature

# Which items would you consider repairing rather than buying new?





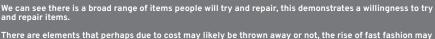
Toys/ children's items



Soft furnishings









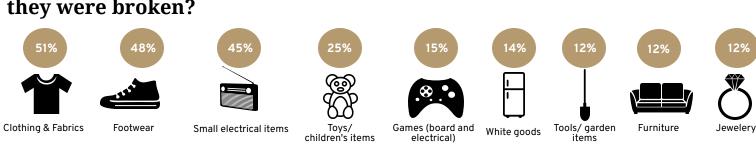
Footwear

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.

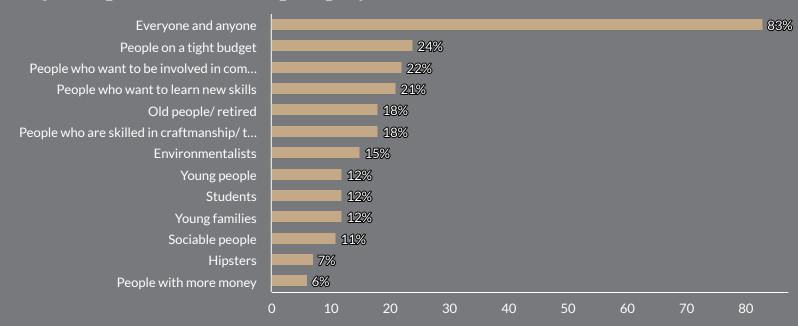
lead to people throwing out clothing or footwear, however more expensive items such as jewellery and

furniture will either need to be repaired by a professional or kept.

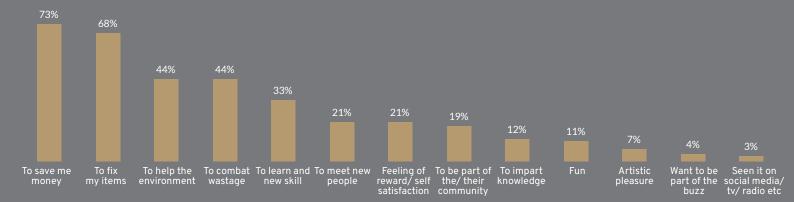
### In the past 6 months, which of these items have you thrown away when they were broken?



# In your opinion who are repair projects for?



# What would prompt you to visit a repair project?



## What would put you off visiting/ using a repair project?



Location too far away



37% Poor opening times



34% Intimidation of feeling useless with skills

knowledge



Concerns over repair quality if

done by volunteers



Space isn't a nice

environment

20%

Lack of parking/

accessibility













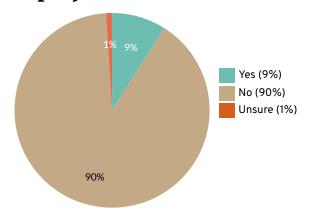
its for me



15%

Takes too long to repair when I can just buy new

# Have you ever used a community repair project before?



#### REPAIR PROJECTS ARE FOR EVERYONE, BUT MOST HAVE NEVER BEEN

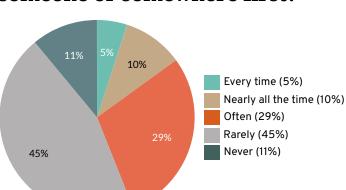
Our respondents agree that these types of projects are for all sorts of people, however only 9% of people have ever visited one.

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**

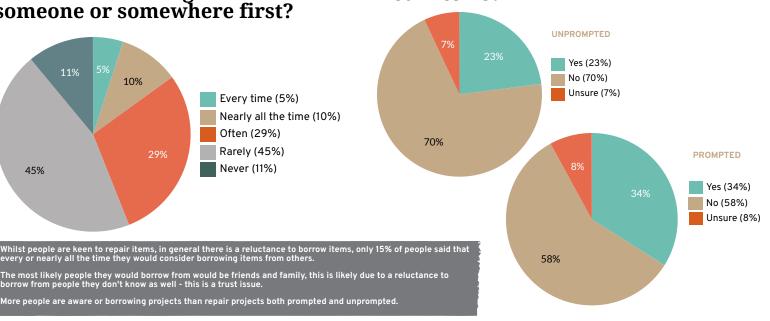
If you were in need of an item you didn't own, how often would you consider borrowing it from someone or somewhere first?



every or nearly all the time they would consider borrowing items from others.

borrow from people they don't know as well - this is a trust issue.

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



## Who would you be likely to borrow an item from?





























Work colleague

Hire service

A community sharing project

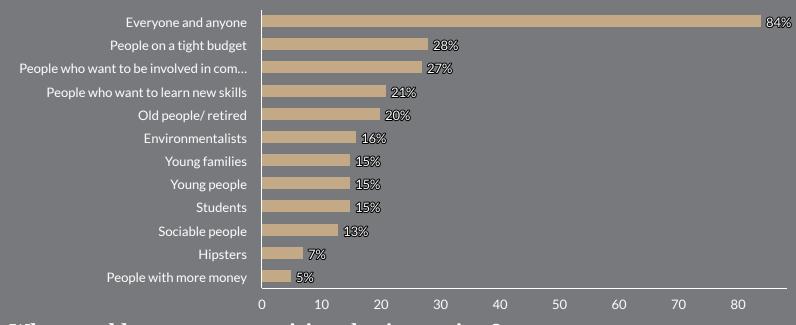
Someone in the community

Family

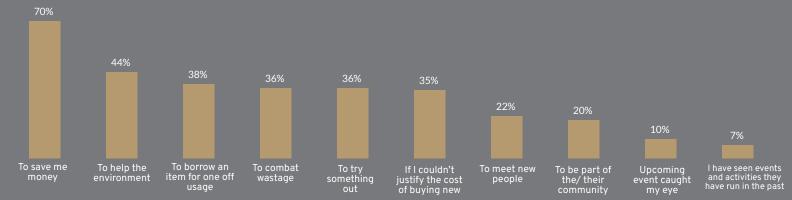
Friends

Neighbour

# In your opinion who are sharing projects for?



# What would prompt you to visit a sharing project?



## What would put you off visiting/ using a sharing project?



Location too far away



41%
Poor opening times



40% Feels dirty/ unclean



Not knowing what items there are to borrow



Nervous about breaking items



21%





Doesn't feel like



Costs too much to get involved

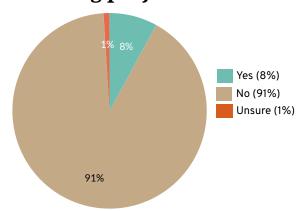
19%





Uncertainty of how to use items/lack of instructions

# Have you ever used a community sharing project before?



### 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.



## What information would make you interested in visiting these projects?





If there was a list of things that can be fixed





Cost savings it might bring me



45%

offer







42% How much it costs



42%

What benefits it brings to me





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

#### INFOLUST

Respondents crave lots of information, be that 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



Learning new skills



Breathing life into old goods



50%

Helping the planet



Satisfaction of

doing good

Maintaining and caring for things Í love

41%





Meeting new people









Finding a hobby



Feeling creative

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





If it were local



50%

If I was on a tight budget (cost of living crisis)



If I was aware it existed



If I could see a proven cost benefit





If it was easily accessible

















If I were made to feel welcome









people who used it



If I could get advice on how to use the item safely



If I can park



If the space was appealing



If I was made aware of the consequences of buving new for the environment





If there was a social space to hang out

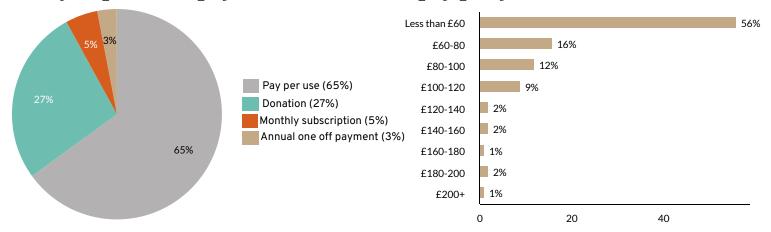
#### **COST IS KING**

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.

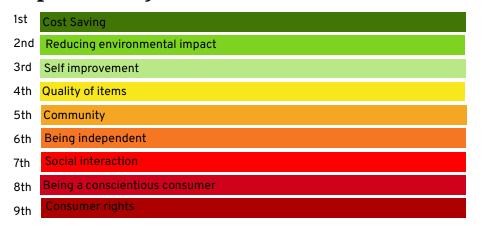
People generally don't see these projects as a place to hang out and socialise, its seen more as a practical service - given 40% of people would be put off visiting sharing projects due to the perception of being dirty, a more welcoming, clean and modern environment would be welcomed.

# If you were to use these services how would you prefer to pay for their use?

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



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



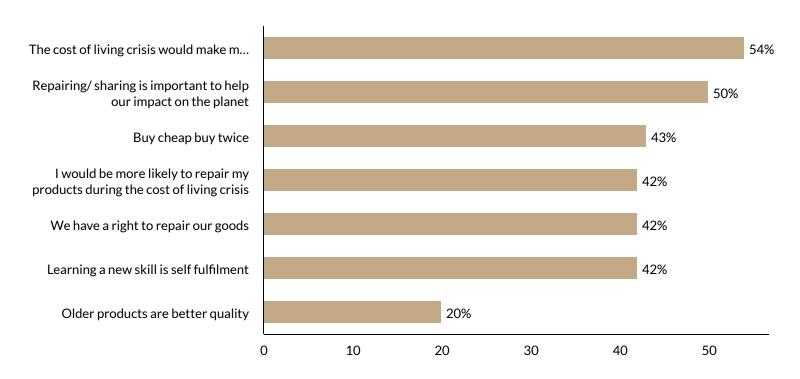
#### PAY AS YOU GO

With cost being an important factor for our audience its 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.

## Which of these statements do you agree with?



## 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...

### **Springboards**

#### 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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