



Impact Report 2023

Shire of Denmark

Introduction

Garage Sale Trail is a waste education and behaviour change program that aims to reduce household waste and support the transition to a circular economy. It looks to educate and engage the community, reduce the volume of usable items in landfill and get more people buying and selling secondhand.

To assess whether the program was effective, Taverner Research Group was commissioned to conduct market research with those who participated in the program in 2023. This report summarises the key findings.

To help you benchmark your results, this year's research showed that on average council partners saw:

- Between 3%-6% of their residents get actively involved as a seller or shopper.
- 12% of residents reached by the ten-week education campaign.
- Cost of recovery averaged \$274 per tonne reused, with each garage sale reusing 446 kilograms of unwanted items. 35% of which would otherwise have gone to landfill.

Snapshot of local & national results



Increasing community participation in the circular economy

4,418



People participated in the campaign in your council area

419,705



People participated in the campaign nationally



Eliminating waste for a healthier ecosystem

48,740 kg



Reused locally

4,862,850 kg



Reused nationally



Circulating dormant goods for a stronger economy

\$38,018



Resale value created locally

\$3,686,260



Resale value created nationally

Arrows denote change from 2022 - 2023

Cash in the Closet: Aussies mainstream the secondhand economy

In 2023, the significance of "economy" in the term "circular economy" has gained prominence. Rising costs of living and increased business costs have prompted both consumers and producers to re-evaluate the potential value embedded in post-use products.

Australians are increasingly turning to secondhand purchases to economise, with 70% of consumers citing cost savings as the main motivator for purchasing pre-loved goods.¹ Similarly, 58% of businesses view cost reduction as the primary advantage of incorporating circular economy practices.²

This economic narrative is introducing the circular economy to a wider audience and fostering long-term sustainable purchasing behaviours within Australian communities. This, in turn, is formalising opportunities for businesses in the secondhand market.

Championed by a growing Millennial and Gen Z consumer base,³ the global secondhand market is on track to double between 2021 and 2027.⁴ Australians are pivotal contributors to this sustainable consumption trend, ranking fourth globally in the frequency of secondhand purchases at 39%.⁵

Despite these positive trends, mainstream secondhand purchasing faces various barriers.

Recent research by Behaviour Works Australia⁶ identified several barriers including lack of awareness of secondhand options, perceptions and social norms surrounding secondhand as a second-class alternative to buying new, distrust of purchasing secondhand items online, inertia of current purchasing habits, and secondhand shopping perceived to be time consuming.

To address these and other barriers, the research recommends that policymakers, industry leaders, entrepreneurs, and advocates should continue and expand efforts to encourage "buying secondhand instead of new" for individual consumers.

For over a decade, Garage Sale Trail has been dedicated to achieving this goal. Working together with a network of government and local community partners, Garage Sale Trail is scaling this impact across Australia.

By empowering individuals to recognise the economic potential of dormant, excess, and unwanted items, Garage Sale Trail is accelerating the growth and normalisation of secondhand trading across the country. Engaging tutorials and robust peer-to-peer education are proving effective in catalysing changes in consumer behaviour, while a structured national campaign provides guidance for individuals and organisations to take immediate action.

Through ongoing collaborative efforts, Garage Sale Trail aims to usher in a future where the majority of Australians regularly participate in secondhand sourcing behaviours, aligning with the transition towards net zero and the circular economy.



Sean Trewick is a circular economy researcher, consultant, and community leader in Australia. Over the past 5 years he has worked to catalyse several circular economy and regeneration themed non-profits and research hubs across Australia and Finland, including Circular Economy Victoria.

Participation

1. Increasing community participation in the secondhand economy



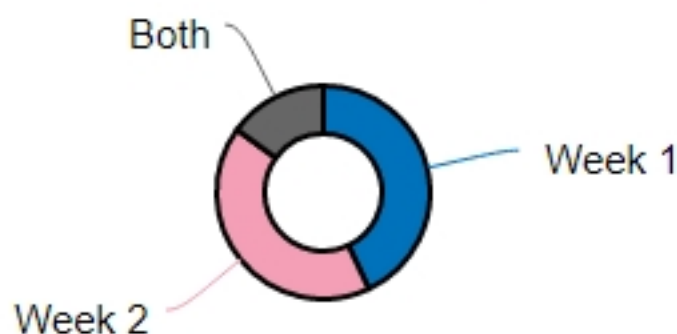
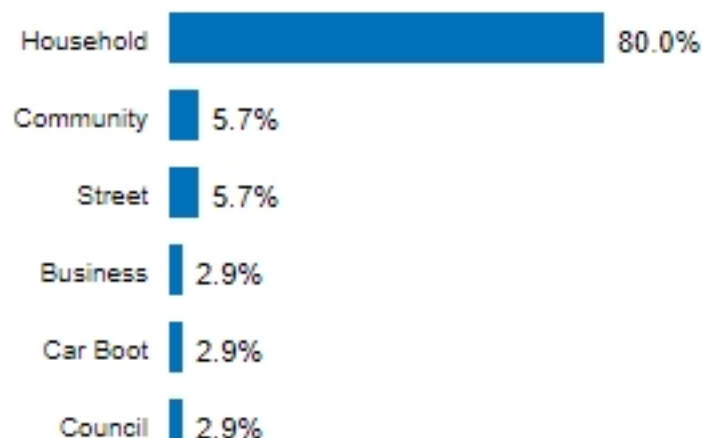
Performance indicator 1.1: Weekends of garage sales

4,415

126

Residents participated locally as a seller or shopper

Total garage sale events hosted locally over the two weekends



Sales registered in weekend 1 versus weekend 2

86

Sales and stalls registered locally

INDIVIDUAL	30
GROUP	5
STALLS	51

Sales by type

Performance indicator 1.2: Trail Tutorials

3

Trail Tutorial registrations locally

93%

Will now make more sustainable lifestyle choices

98%

Enjoyed the sessions

Community interest in secondhand is growing

Total participation in the Garage Sale Trail program increased by 44% nationally, with a significant growth in the number of households registering for the program (up 32%).

Shopper numbers increased too, up 53% from an average of 32 shoppers per garage sale in 2022 to 49 in 2023. It is likely this reflects the significant increase in media generated (up 189%) as well as a greater demand for secondhand products due to cost of living pressures.

This is backed up by survey data which showed that the number one reason why shoppers got involved was to save money (80%). 48% of sellers participated to make money.

On a local government level, participating councils typically saw between 3%-6% of their population get actively involved as a seller or shopper.

Engagement in the Trail Tutorials waned

The Trail Tutorial online event series saw a decline in numbers in 2023 (down 69%). This may be due to a shorter promotional period (four weeks, compared to six in 2022) but also be an indicator of community fatigue with online events.

Despite the low registrations - 632 people registered to attend a Trail Tutorial nationally - they were impactful and well received, with 93% of participants saying the events inspired them to make more sustainable lifestyle choices and 98% saying they enjoyed the sessions.



Performance indicator 2.1: Educating, changing behaviour and creating a new social norm

4,394

Residents visited the
Garage Sale Trail website

7,427

Residents reached by
seller word of mouth

70%

Will consume less in the future
& buy more items secondhand

Performance indicator 2.2: Preventing & avoiding waste

48,740 kg

Sold and reused locally

40%

Would otherwise have
gone to landfill



Creating a new circular economy norm

While buying and selling secondhand is becoming increasingly popular, driven in large part by the appetite of Millennials and Gen Z, there are still barriers to overcome to make secondhand more mainstream.

The Garage Sale Trail program takes a peer-to-peer approach to help shift the social norm and increase participation in the secondhand economy.

In 2023, survey data showed that on average participating sellers told 99 people about their involvement in the event, helping to role model and make pre-loved more mainstream. Overall, messaging about the program and secondhand reached 12% of a participating council's population on average.

Keeping products in use for longer & preventing waste

As well as increasing the reach and number of people involved in the secondhand economy, the program is also playing a role in reducing and preventing usable items ending up in landfill:

- 85% of sellers said the program helped them to avoid sending items to landfill.
- On average each garage sale sold 90 items, representing 446 kg reused per sale.
- Of the items sold, sellers admitted that at least 36% would otherwise have gone to landfill or been illegally dumped on the kerbside.

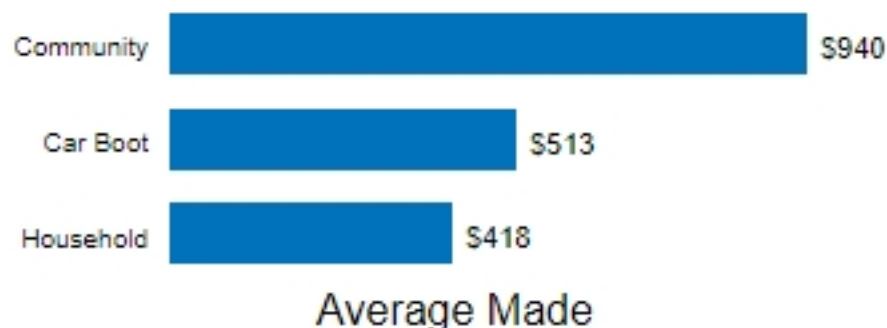
Across participating council areas, the cost of recovery averaged \$274 per tonne reused, before factoring in any longer term behaviour change.



Performance indicator 3.1: Raising household income

\$38,018

Total generated locally



Performance indicator 3.2: Growing the secondhand market

53%

Would not otherwise have **hosted** a garage sale

25%

Would not otherwise have **shopped** at a garage sale

97%

Are more likely to sell unwanted items in the future

Helping Australians make and save money

Data shows that the rising cost of living is driving an increase in secondhand purchasing. This is evidenced by the increase in the number of people who shopped the trail in 2023, up 53%.

While buying secondhand provides an opportunity to save, selling pre-loved items is also providing Australians with a welcome cash boost. In 2023, sellers pocketed an average of \$456.84 on the Garage Sale Trail, and on average, each \$1 invested by a partner council generated \$5.85 for the local community.

With cost of living pressures continuing, programs like Garage Sale Trail present an opportunity to engage new members of the community in the circular economy. This is reinforced by findings from consumer research which showed that a third (31%) of Australians will buy more items secondhand if economic conditions worsen.⁷

Increasing the supply and demand for secondhand products

Survey data showed that the Garage Sale Trail program is increasing both supply and demand for secondhand products.

Nationally:

- 53% of sellers would not otherwise have hosted a garage sale.
- 35% of shoppers would not otherwise have shopped at a garage sale.

For those that were new to secondhand selling, being involved in a national event was the primary motivator - 71% of first timers got involved for this reason. Similarly, for those new to shopping, 89% said that having lots of events happening at the same time was what persuaded them to get involved.

Indications are that this change in behaviour will be sustained, with 81% of sellers stating they are now more likely to sell items they no longer need in the future and 74% of shoppers stating they are now more likely to buy secondhand products over new.

Performance indicator 4.1: Improving community connectedness

52

Average number of people met per garage sale

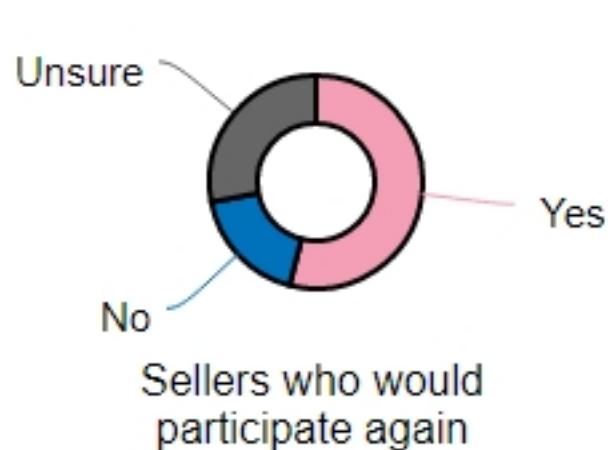
87%

Of people met were not previously known to the resident

80%

Felt more connected to the local community after participating

Performance indicator 4.2: Community engagement & experience



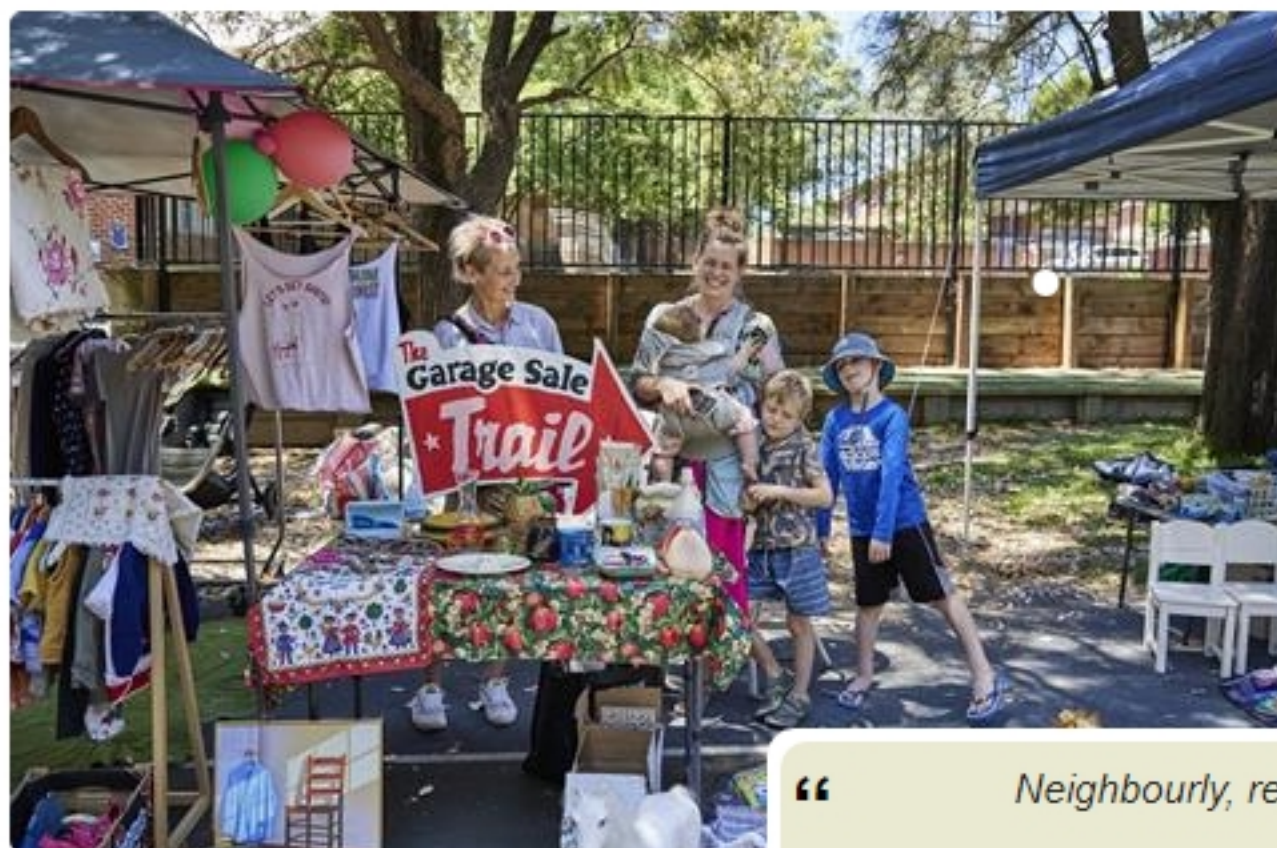
80%

The event met or exceeded their expectations

Garage sales provide an opportunity to connect and build social cohesion

While there are lots of ways for residents to reuse their unwanted items, few of them compare to a garage sale in their ability to build in-person community connections.

On average, a participating seller will meet 49 people each day of their garage sale, with 89% of people previously not known to them. And while very few get involved to meet their neighbours (7%), the social aspect of Garage Sale Trail is one of the biggest contributors to residents' positive sentiment towards the program.



“ Neighbourly, rewarding, positive experience

- Shire of Denmark resident

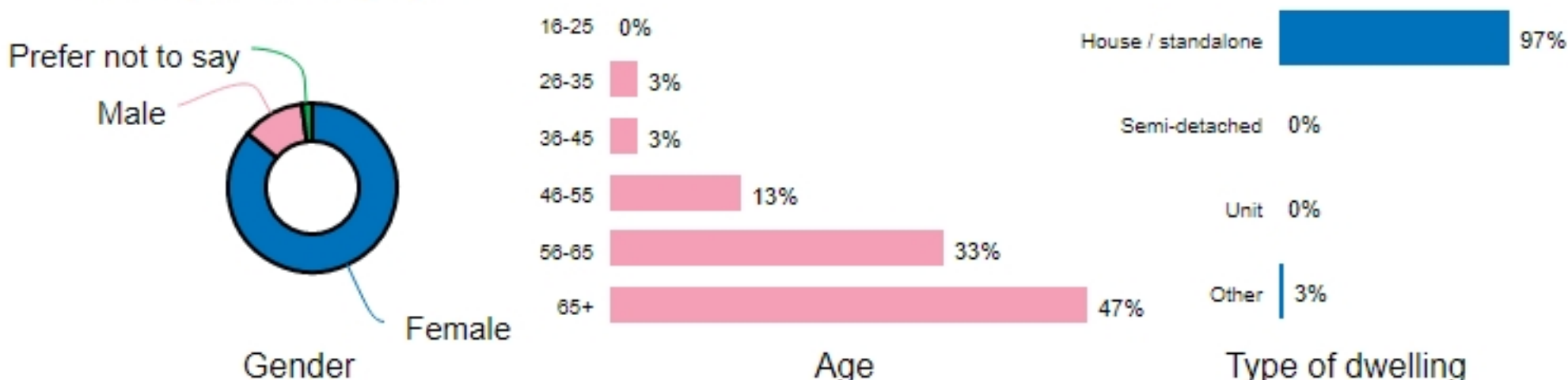
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Demographics

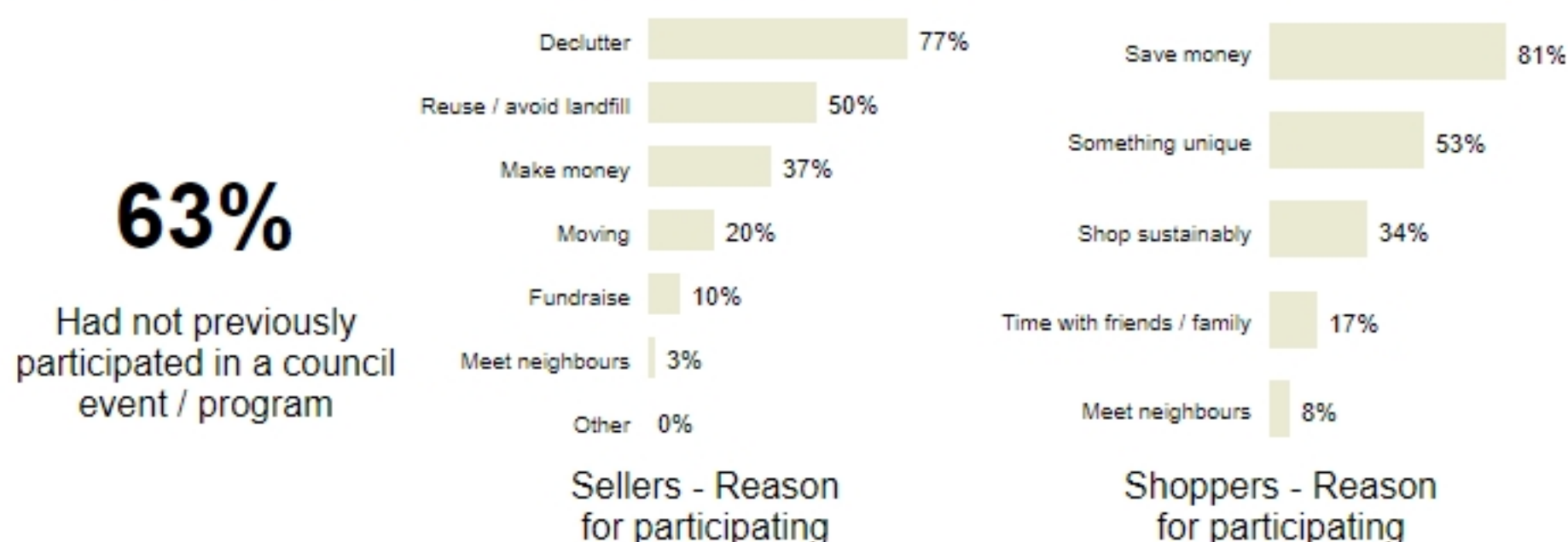
5. Engaging new audiences



Participant demographics



Performance indicator 5.1: Reaching new audiences



Garage Sale Trail engages an older audience who are not selling secondhand

Research by the Commonwealth Bank shows a great appetite amongst Australians to buy and sell secondhand but a significant lack of uptake in older generations such as Gen X and Baby Boomers. For these groups, only 9% and 4% respectively had used an online marketplace to sell pre-loved items.⁸

Garage Sale Trail flips this trend, with 77% of sellers coming from older groups that tend to be not as engaged in the secondhand economy. This reinforces the role of programs like Garage Sale Trail in creating a social norm around reuse and secondhand.

Engaging with culturally and linguistically diverse Australians

Increasing engagement with culturally and linguistically diverse communities was a priority and this year survey data enabled us to benchmark participation from these groups. In 2023, 6% of sellers spoke a language other than English at home and 21% were born outside of Australia.

The program reaches new audiences for council

68% of sellers stated they had not previously been involved in a council run initiative. Furthermore, 52% of those who attended a Trail Tutorial had not previously attended a sustainability workshop.

Both figures suggest the program is helping councils to reach new audiences.



Performance indicator 6.1: Reach of the waste education campaign

40,594,513

People cumulatively reached nationally

36,138,025

People cumulatively reached by the media campaign

3,656,788

People cumulatively reached by the digital marketing campaign

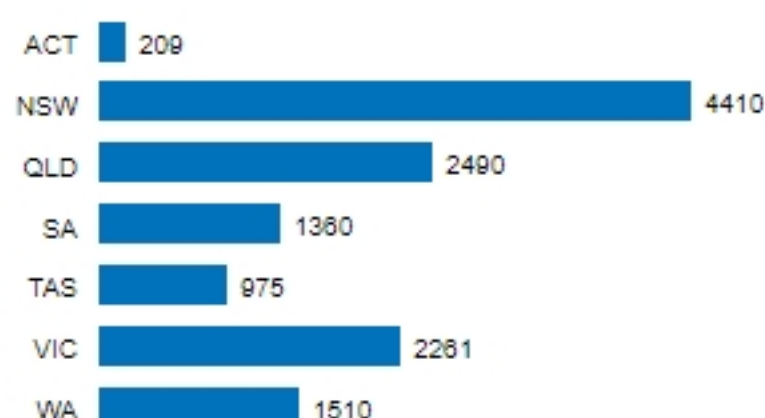
Performance indicator 6.2: Program participation

419,705

Australians participated in the program nationally

13,220

Garage sale events hosted nationally



Events by state / territory

Messaging about the circular economy reached a wider audience

The education campaign reached a cumulative audience of over 40 million Australians in 2023 and ran nationally across television, newspaper, radio, email and online marketing channels such as Google, Facebook and Instagram.

The reach of the campaign (excluding council promotions) almost doubled, largely due to a significant increase in media coverage particularly radio. Overall, media reach increased 189%, largely driven by the Garage Sale Trail PayPal research report, the cost of living crisis and resulting appetite from journalists to cover related stories.

Media highlights included:

- National television coverage on 7 News, 9 News, Studio 10 and Today Extra.
- 824 pieces of radio coverage secured reaching a cumulative audience of over 30 million Australians across every state and territory.
- Online coverage in 9Honey, Sydney Morning Herald, Daily Telegraph, The Age, Brisbane Times, WA Today, Time Out and Concrete Playground.

Impacts scaled across the country

With the increase in the reach of the campaign, came a resulting increase in impacts. Overall participation in the program increased by 44% nationally, with the biggest increases seen in states where there was significant growth in the partner council footprint; Tasmania (up 209%), Queensland (up 77%) and Victoria (up 20%).

Across the country, 419,705 Australians participated, extending the life of 4.8 million kgs of unwanted household items and generating a \$3.6 million boost to local economies. These results were achieved thanks to the involvement of local and state government, community groups and media.

This report was prepared by Taverner Research Group, a third-party market and social research company that works with government and private sector organisations across many sectors including waste and sustainability.

Data sources

Data contained in this report comes from the following sources:

- Participant registrations for the two weekends of garage sales, received through the Garage Sale Trail website between 1 September and 19 November 2023.
- Participant registrations for the Trail Tutorials, received through the ticketing website Humanitix between 1 September and 29 October 2023.
- Website, media and marketing monitors including Facebook, Google Analytics, Instagram and Stream media monitoring covering 1 September to 20 November 2023.
- Survey of Trail Tutorial attendees between 28 October - 5 November 2023 (hosted internally).
- Survey of garage sale sellers and shoppers between 11-29 November 2023 (hosted by Taverner Research Group).
- Fifth Quadrant research on behalf of Garage Sale Trail and PayPal conducted in September 2023 and completed by 1,005 Australians aged 18-75.

About the participant survey

In total, 1,374 people completed the participant survey, representing 25% of registered sellers.

While the response rate is considered statistically significant on a national level, response rates per council area were not at a high enough volume. For this reason, the relevant metro and regional averages for the state or territory have been applied to local participation data.

Notes for interpreting your report

A conservative approach was taken when calculating impacts. For example, some outlier data was excluded to avoid overestimating impacts. Aggregated data may be different (+ / - 1%) due to rounding.

In some instances, the sum of displayed responses to a single response exceeds 100%. This reflects answers to questions that allowed multiple answers from the same respondent.

More information

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Citations:

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2. Planet Ark. 2023. Circularity in Australian Business 2023.
3. Monash University. 2023. Retail Sustainability Spotlight.
4. ThredUp. 2023. Resale Report.
5. Morning Consult. 2022. Consumers who purchased or sold secondhand goods in selected countries in 2022.
6. Macklin, J., Jungbluth, L. & Borg, K. 2023. Behavioural roadmap to circular consumption.
7. Garage Sale Trail PayPal Research Report 2023
8. Commonwealth Bank 2022. Circular Economy, The Impact of business-led action on future consumers