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Consumer Adoption of Next-Gen Materials: A U.S. Segmentation Study

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Conducted by North Mountain Consulting Group in partnership with Material Innovation Initiative

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Executive Summary

The purpose of the study was to assess indicators of future adoption, determine potential market shares, and profile early adopters of next-gen materials. We obtained a large representative U.S. sample (N = 2,051) with interlocked sampling quotas for age, gender, and region. We reported results for the general population and by early adopter and generational segments.

Nearly all participants (94%) stated they were at least somewhat likely to purchase next-gen materials, and nearly half (45%) reported a high likelihood of purchasing. Interest in purchasing was consistent across generations and geographic regions. Likelihood of purchasing products was higher for products made with familiar production technologies, including recycled materials, biodegradable materials, and materials sourced from plants/algae/fungi. Sixty percent of early adopters were willing to pay more for next-gen materials than conventional materials, and Gen Z, Millennials, and Gen X were more likely to pay more than Boomers. Estimated market share of next-gen products ranged from 54-66% of total purchases for each material subcategory (leather, wool, down, silk, fur, exotic skins). Environmental benefits, animal welfare, and product quality were the top reported reasons to purchase next-gen materials. *Eco*, *animal-free*, and *next-gen* were the most preferred names. The sociodemographic characteristics of early adopters were very similar to the general population in terms of age, gender, region, and race/ethnicity. The early adopter population was slightly more educated, higher income earning, and more liberal.

This study outlines the overall landscape of potential consumer adoption among the U.S. population, as well as the preferences, shopping habits, and sociodemographic profile of early adopters.

Table of Contents

Introduction

A new category of high performance and more sustainable materials are emerging as an alternative to materials traditionally sourced from animals, including leather, silk, fur, wool, down, and 'exotic' skins. The value of the global fashion market is expected to reach 878 billion USD in 2021 (Statistica, 2021). In the United States, fashion industry revenue is expected to reach 189 billion USD in 2021, or 22% of the global total (Statista, 2021).

To most effectively market next-gen materials, understanding the habits and preferences of consumers most likely to purchase next-gen products is key for initial sales and long-term societal adoption. In accordance with the Diffusion of Innovation theoretical model, these consumers are called early adopters, as they are the individuals in a population who will be the first to adopt new technological innovations (Rogers, 2003). Subsequent population segments watch and later adopt after the innovation begins to normalize in society. It is important that early adopters within each unique geographic region are examined, as beliefs and sociodemographic data will be distinct based on the population and culture of each locale in which next-gen materials could potentially be sold. The current study focused on segmenting U.S. consumers and investigated generational segments and early adopters regarding their likelihood of adoption, preferences, and sociodemographic information, in order to provide insight into the pathway to adoption.

The current study is part of a research agenda initiated by the Material Innovation Initiative to better understand consumer attitudes toward and behavior around an emerging category of new materials that are high performance, more sustainable, and animal-free.

The first in the series of studies was an exploratory study toward 'alternative leather' in the U.S. (Szejda & Urbanovich, 2021a). This study found a high degree of interest toward this emerging category of materials — more than half of the sample (N = 519) indicated a preference for 'alternative' leather over animal leather. These U.S. consumers were open to different production technologies, willing to pay more, and preferred messages focused on animals, sustainability, or material performance.

A second study (Szejda & Urbanovich, 2021b) focused on U.S. consumers' perception and preferences for nomenclature used to describe these 'new' materials. Consumers (N = 501) assessed nomenclature options against appeal and descriptiveness factors for the overall category term, and also assessed appeal for each of the six subcategories (leather, wool, silk, down, fur, exotic skins), and overall preference. Next-gen, eco, and animal-free were the top contenders, though next-gen emerged as a best fit on the basis of (a) being most preferred by consumers, (b) differentiation from other types of materials on the market, and (c) consistent fit across the six subcategories.

A third study surveyed a representative sample of urban Chinese consumers (N = 501) on next-gen and conventional leather products. Ninety percent preferred next-gen leather over conventional leather, and 70% were highly likely to purchase next-gen leather (Szejda & Urbanovich, 2021c). Consumers were motivated to purchase for multiple reasons, including the environment, product quality, animal welfare, personal expression, and cost.

The purpose of the current study is to understand the next-gen materials from the viewpoint of the U.S. consumer, including the general U.S. population, generational categories, and those who report a high interest in purchasing next-gen materials. We aimed to obtain a large representative sample, assess indicators of future adoption, determine potential market shares, and profile early adopters.

Research questions regarding indicators of future adoption focused on the general population, each generation, and early adopters.

RQ_1: What is the level of purchase interest in the next-gen materials category?

RQ_2: To what degree are consumers willing to pay a higher price for next-gen materials?

RQ_3: To what degree do consumers support next-gen materials becoming widely available?

The research question regarding potential market shares of next-gen subcategories (leather, wool, silk, down, fur, and exotic skins), focused on future purchasers within the subcategory. Subcategory purchasers included those who would purchase a conventional product, next-gen product, or both within the next five years.

RQ_4: What is the potential market share of next-gen subcategories, including (a) leather, (b) wool, (c) silk, (d) down, (e) fur, and (f) exotic skins?

Research questions regarding the sociodemographic profile of early adopters focused on those who reported a high likelihood of purchasing. For comparison purposes, we also reported the general population results.

RQ_5: What are early adopters' motivations for purchasing next-gen materials?

RQ_6: What nomenclature choices do early adopters' prefer, and what are the reasons for their preference?

RQ_7: What is the likelihood of early adopters purchasing products made with specific technologies?

RQ_8: What are the early adopters' level of interest in purchasing within product types (e.g., sofa, sweater, purse)?

RQ_9: What are the shopping habits of early adopters, including desired attributes in products and brands previously purchased?

RQ_{10}: What are the sociodemographic characteristics of early adopters?

Method

Participants

Participants (N = 2,051) were recruited from CINT research panels via Positly. We used a tight sampling protocol to recruit the U.S. population ages 15-74 by interlocked age (four year ranges), gender, and geographic region groups (see quotas in Appendix A). Age, sex, and region quotas were established in accordance with 2019 population projections from the U.S. Census Bureau. The final sample closely matched the sampling goal, though there was slight underrepresentation in the Southern region and overrepresentation in the Northeastern region. Sociodemographic characteristics of both the early adopter segment and the full sample can be found in the sociodemographics section of the results. Participants were included in the study if they passed a reading comprehension check and a survey duration minimum.

Procedures

At the beginning of the survey, participants read a short introduction to next-gen materials that described the types of products, technologies and qualities of next-gen materials (see Appendix B). Following the introduction, participants were asked questions related to their likelihood of adoption, motivations for purchasing, preferences toward next-gen and conventional materials, and their sociodemographics.

Measures

The full questionnaire and open-access dataset is available on Open Science Framework. Below we provide brief descriptions of each measure. Where relevant, answer choices and questions were randomized to prevent an order effect.

Indicators of future adoption

Likelihood of purchasing next-gen materials. Answer choices included *not at all likely, somewhat, moderately, very, and extremely likely.*

Likelihood of paying more for next-gen materials in comparison to conventional. Answer choices included *much lower, slightly lower, about the same, slightly higher, and much higher.*

Support for the technology becoming widely available. Answer choices included *not at all likely, somewhat, moderately, very, and extremely supportive.*

Potential market share for each subcategory of materials (leather, wool, silk, down, fur, exotic skins). For this scenario, participants were asked to assume a future in which next-gen materials were widely available, affordable, and high quality. In the first step, participants selected the material type they would purchase in the next five years. For each of the six subcategories of materials, answer choices included conventional, next-gen, or none. If conventional, next-gen, or both material types were selected, the participant was considered a purchaser within that subcategory. In the second step, a skip pattern led subcategory purchasers to the market share question, in which they dragged a slider to indicate the percentage of conventional and next-gen material they would likely purchase over the course of a year.

Characteristics of early adopters

Purchase motivations. Participants considered five reasons (environment, animal welfare, quality, cost, and personal expression) for purchasing next-gen materials, and then reported the degree to which they found each reason to be motivating. Answer choices included *not at all likely, somewhat, moderately, very,* and *extremely motivating*.

Nomenclature preference. Nomenclature terms were selected from a previous study on nomenclature for next-gen materials (Szejda & Urbanovich, 2021b) and included *eco, animal-free, next-gen, bio-based, alternative, vegan*, and *bio*. Participants selected their preferred name among these seven choices. The nomenclature questions were asked immediately after the description of "new materials" (*next-gen* was not introduced as a term until after the nomenclature questions).

Nomenclature reasons. The list of reasons for preferring nomenclature was developed based on major themes emerging from open-ended responses in the nomenclature study (Szejda & Urbanovich, 2021). Participants selected one or more reasons for preferring their selected term. Reasons included: shows that the products are innovative; shows that the products do not harm animals; shows that the products are good for the environment; shows that the products are high performance; shows that the products have multiple characteristics; shows that the products are different from currently available products; sounds appealing; accurately describes the products; is an appropriate fit; is easy to understand; is already a familiar term; is appealing to multiple audiences; other.

Likelihood of purchasing products made with specific technologies. Participants considered six technologies for producing next-gen materials, and rated their likelihood of purchasing each. Answer choices included *not at all likely, somewhat, moderately, very,* and *extremely likely to purchase*. Participants were provided a phrase describing each technology, as follows: sourced from plant, algae, and fungi; sourced from laboratory-grown animal cells (e.g., cultivated leather); sourced from biodegradable or compostable materials; sourced from recycled materials; sourced from greenhouse gas inputs (i.e., carbon sequestration); and sourced from biopolymers (e.g., cellulose) produced by yeast or bacteria.

Product types. For this question we asked participants to assume a future in which next-gen materials were widely available, affordable, and high quality. We then asked about future purchases of specific product categories. Categories included shoes, wallet, coats, sweater, sofa or chair, belt, automobile, handbag or purse, scarf, and tie. For each product type, participants indicated whether they would purchase conventional, next-gen, or none in the next five years. We reported the percentages for men and women who would purchase next-gen within each product type.

Shopping habits (product attributes). Participants selected the attribute they consider most often when purchasing fashion, automotive, and homegoods products. Answer choices included price, brand, value, quality, innovation, sustainability, health impacts, and other.

Shopping habits (brands). Participants selected the brands they have purchased in the past five years. Brands included Nike, Under Armor, Adidas, North Face, Calvin Klein, Gap, H & M, Ralph Lauren, Disney Store, Toms, Lululemon, Patagonia, Louis Vuitton, Zara, The Limited, Prada, Aldo, ASOS, Alternative Apparel, Marmot, Esprit, Stella McCartney, FUMA, Eileen Fisher, Everlane, Freebirds, and Reformation.

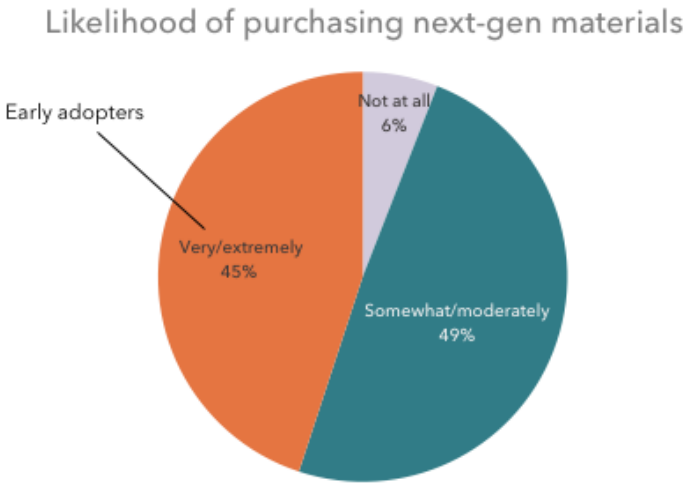
Sociodemographics. Measures included age, gender, region, race/ethnicity, education level, household income, and political orientation.

Data analytic plan

We reported results for the general population (full sample) and by early adopter and generational segments. For visual simplicity when reporting the results, we grouped questions with five answer choices into three categories. The three answer categories included: none (*not at all*), medium (*somewhat* and *moderately*), and high (*very* and *extremely*). We also checked for regional differences in the purchase likelihood question.

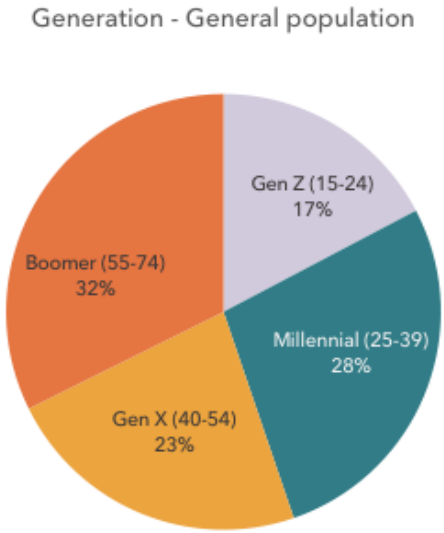
Early adopter segment

We defined the early adopter segment as those who reported a high level of purchase interest (*very* or *extremely likely* to purchase). Early adopters constituted about half (45%; *n* = 922) of the full sample.



Four generational segments

Generational categories included Gen Z (ages 15-24), Millennials (ages 25-39), Gen X (ages 40-54) and Boomers (ages 55-74).

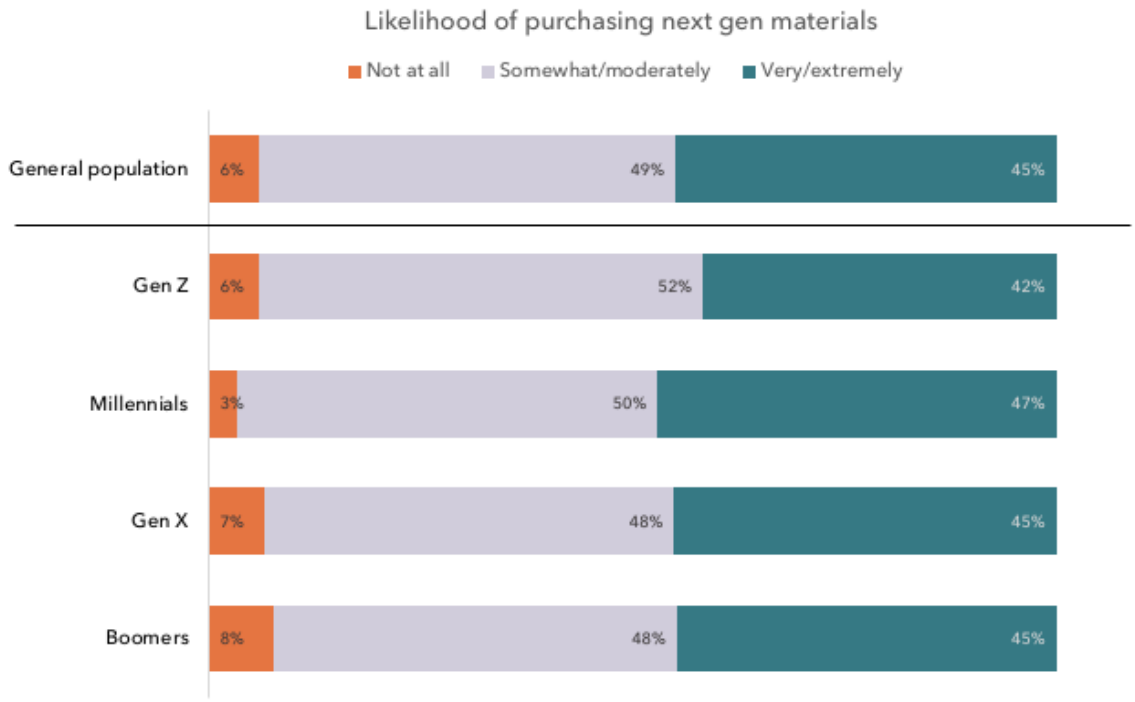


Results: Indicators of Future Adoption

We assessed several indicators of consumer adoption, including purchase likelihood, willingness to pay more, and support of next-gen materials. Results for these indicators are shown for the general population (full sample), each generational segment, and the early adopter segment (those highly likely to purchase). Results for potential market shares are based on the segment of consumers who would purchase each specific subcategory of material (leather, wool, silk, down, fur, exotic skins).

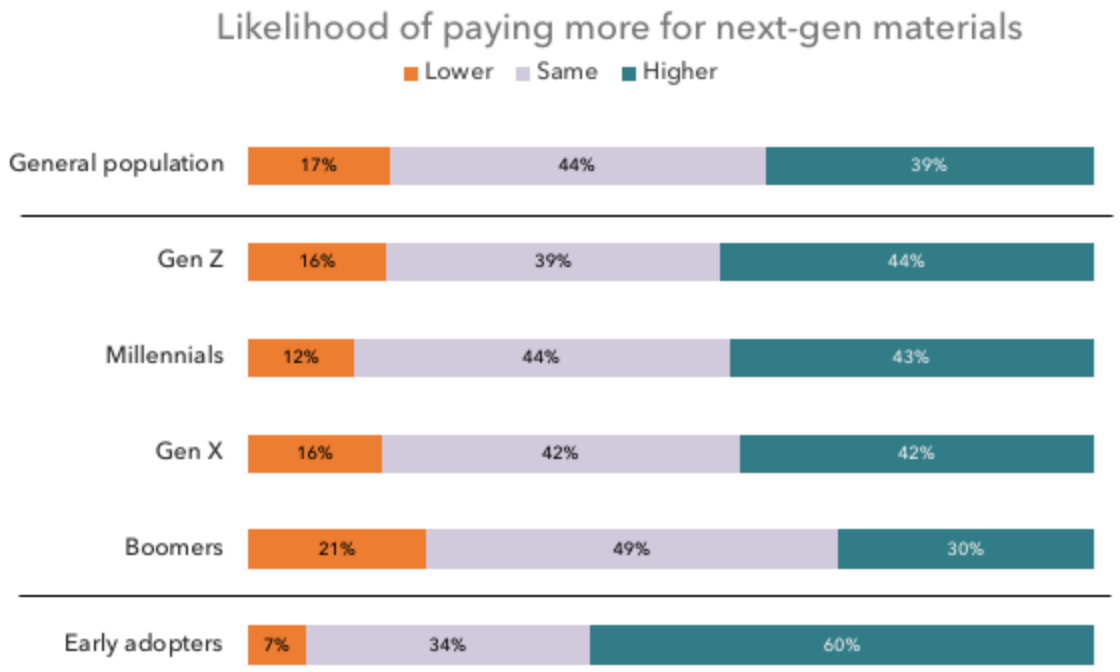
Likelihood of purchase

Nearly all participants (94%) stated they were at least somewhat likely to purchase next-gen materials, and nearly half (45%) were highly likely to purchase. We classified this latter group as the early adopters. Likelihood of purchase was fairly similar across generations: Millennials were the most likely to purchase (47%), followed by Gen X (45%), Boomers (45%), and Gen Z (42%). For this question we conducted an additional analysis to check for geographic differences, and found the four regions to be fairly similar: 49% of those in the West were early adopters, followed by the Northeast (45%), Midwest (45%), and South (42%).



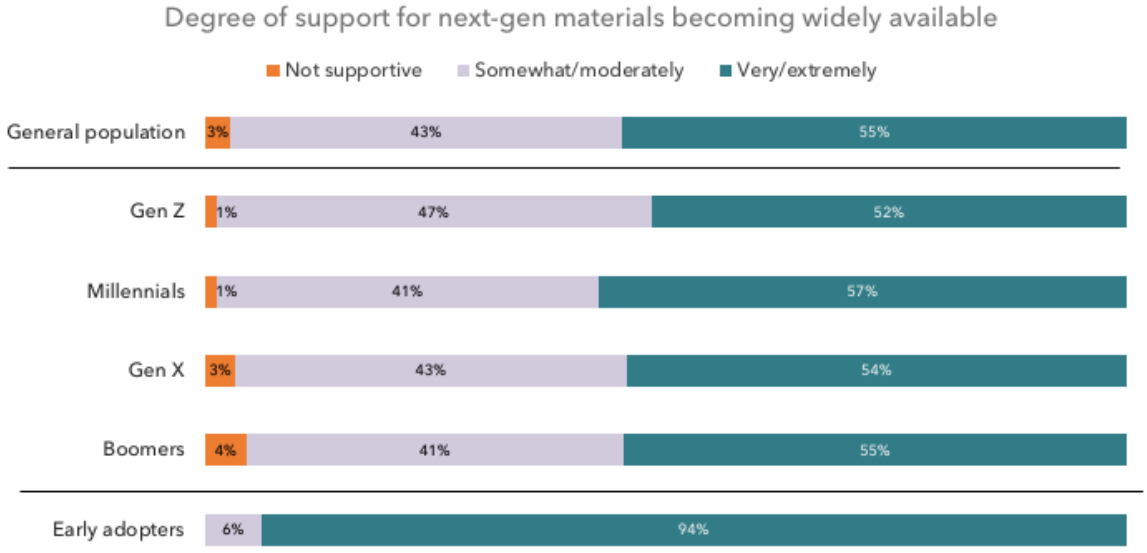
Likelihood of paying a higher price

Most participants (83%) stated they were at least somewhat likely to pay a higher price, and more than one third (39%) were highly likely to pay more. Among the early adopter segment, 60% were willing to pay more. Likelihood of paying more was similar amongst the Gen Z, Millennials, and Gen X segments (42-44%), though Boomers were less likely to pay more (30%).



Support

We found that nearly all of the general population (97%) were at least somewhat supportive of next-gen materials being widely available, while more than half (55%) of the general population was highly supportive. Support was fairly even across generations.



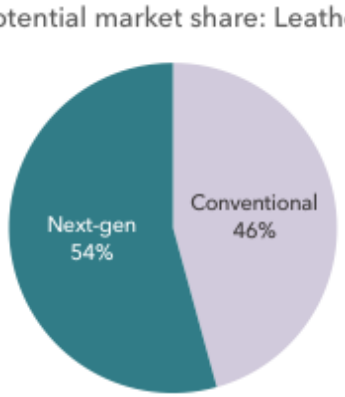
Results: Potential Market Shares

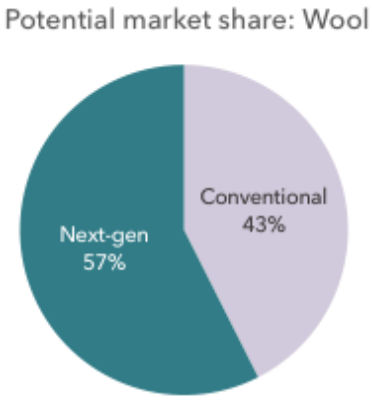
To understand potential market share, we first segmented participants by whether they reported being likely to purchase products within each material subcategory (i.e., leather, wool, silk, down, fur, or exotic skins) in the future. This was accomplished by asking participants to select the type of products they would purchase in the next five years (either conventional, next-gen, or none for each of the six subcategories of material). For context, participants were asked to assume a future in which next-gen materials were widely available, affordable, and high quality. The percentage of purchasers (i.e., those who selected conventional, next-gen, or both within a subcategory) ranged from 39% (fur) to 82% (leather).

Then, we asked the participants who reported that they would purchase within each respective material subcategory to estimate the percentage of both material types (conventional leather and next-gen leather) they would likely purchase over the course of a year. Estimated market share of next-gen products ranged from 54-66% of total purchases for each material subcategory, compared to 34-46% for conventional products.

Leather

Of the full sample, 82% indicated they would purchase conventional leather, next-gen leather, or both types in the next five years. Among those consumers who would purchase a leather product, the average estimate of next-gen purchasing was 54%.



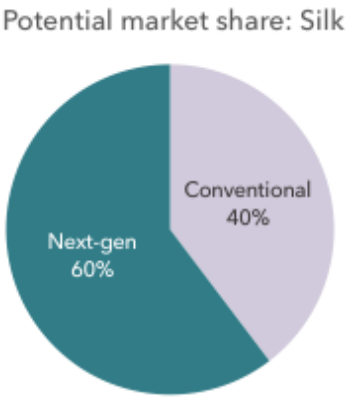


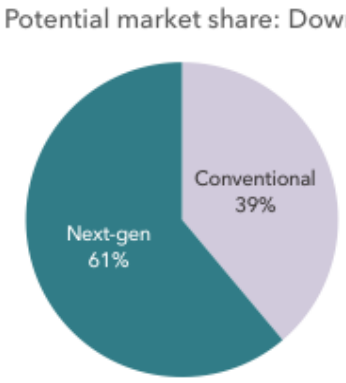
Wool

Of the full sample, 72% indicated they would purchase conventional wool, next-gen wool, or both types in the next five years. Among those consumers who would purchase a wool product, the average estimate of next-gen purchasing was 57%.

Silk

Of the full sample, 68% indicated they would purchase conventional silk, next-gen silk, or both types in the next five years. Among those consumers who would purchase a silk product, the average estimate of next-gen purchasing was 60%.



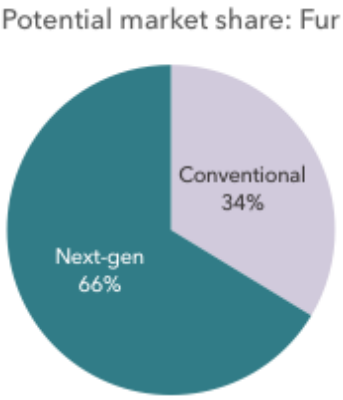


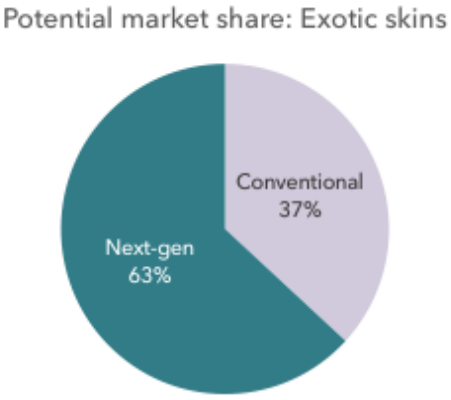
Down

Of the full sample, 65% indicated they would purchase conventional down, next-gen down, or both types in the next five years. Among those consumers who would purchase a down product, the average estimate of next-gen purchasing was 61%.

Fur

Of the full sample, 48% indicated they would purchase conventional fur, next-gen fur, or both types in the next five years. Among those consumers who would purchase a fur product, the average estimate of next-gen purchasing was 66%.





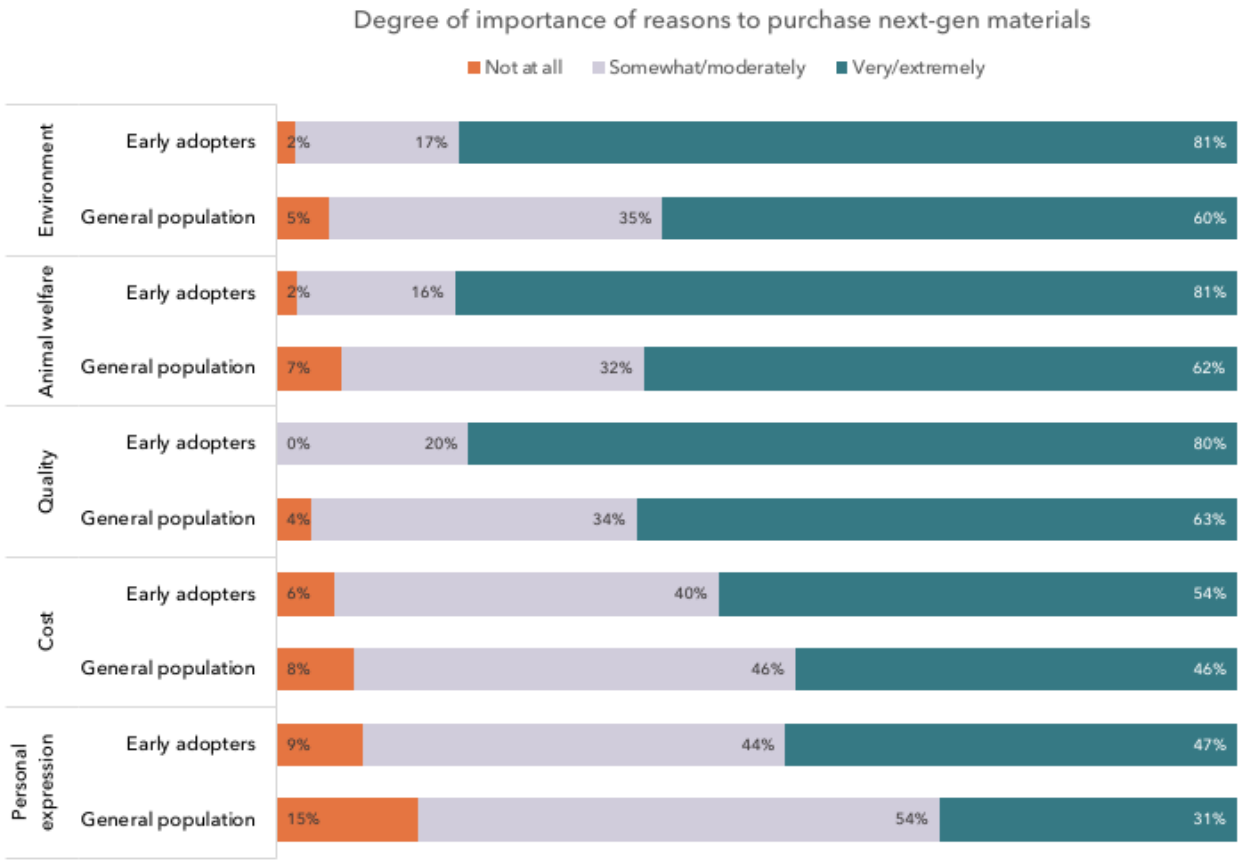
Exotic skins

Of the full sample, 39% indicated they would purchase conventional exotic skins, next-gen exotic skins, or both types in the next five years. Among those consumers who would purchase an exotic skin product, the average estimate of next-gen purchasing was 63%.

Results: Characteristics of the Early Adopter Segment

Motivations

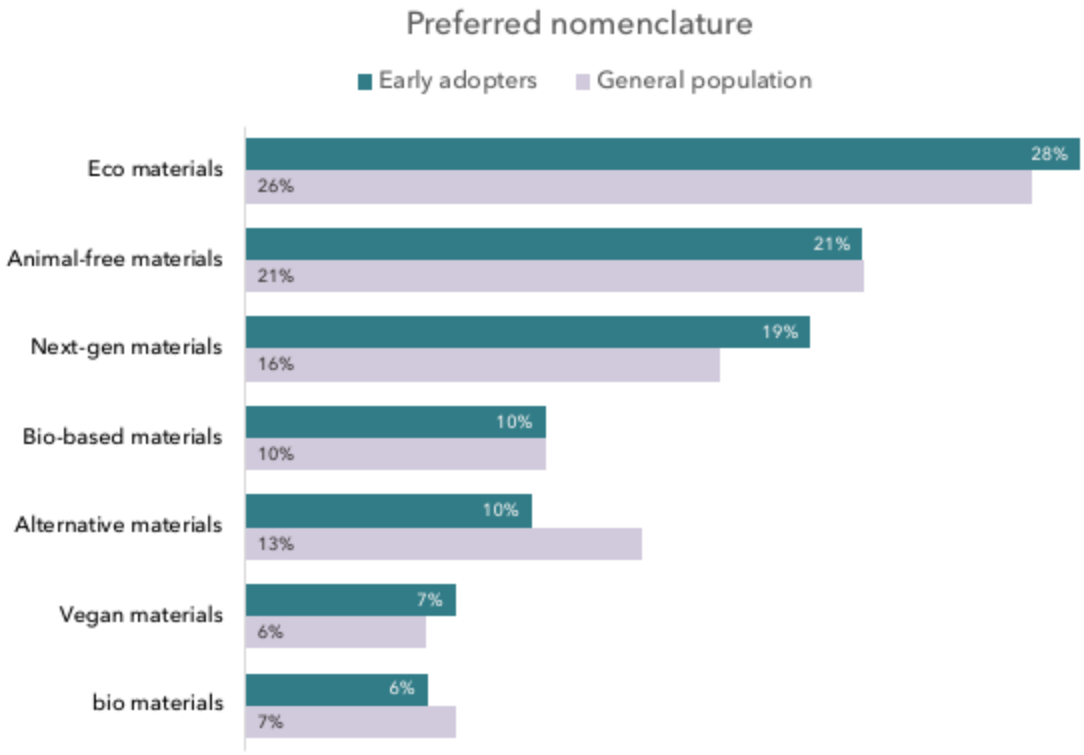
Overall, each reason for purchasing next-gen materials was rated highly important by 47-81% of the early adopter segment and 31-63% of the general population. Early adopters' motivations followed the same pattern as those of the general public; however, more of the early adopters rated these beliefs as very or extremely important than did the members of the general public. For both groups, environmental benefits, animal welfare, and quality were top reasons for purchasing next-gen materials (80-81% for the early adopters and 60-63% for the general population).



Nomenclature

Preferences

In congruence with motivations for purchasing, the top three names preferred by early adopters were *eco* (preferred by 28%), *animal-free* (preferred by 21%), and *next-gen* (preferred by 19%). *Bio-based*, *alternative*, *vegan*, and *bio* were less preferred overall. In a more detailed analysis of nomenclature for the category, Szejda and Urbanovich (2021b) found the same three names to be preferred by consumers, though consumers most frequently selected *next-gen* as their preference in that study (notably, name preference was asked after participants considering both appeal and descriptiveness qualities).

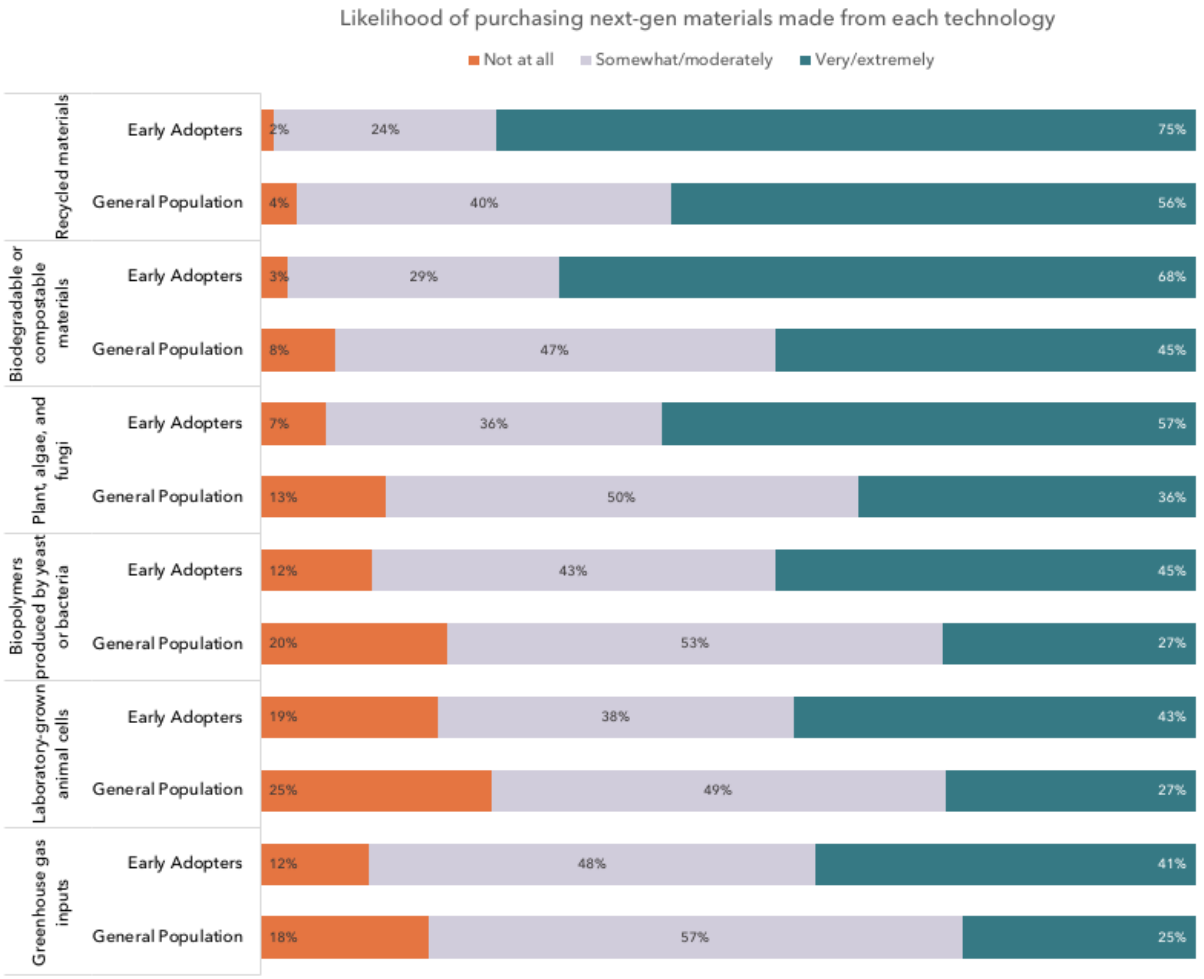


Reasons for nomenclature preferences

We next assessed reasons for nomenclature preferences (potential reasons were gleaned from the open-ended responses in the nomenclature study). Overall, name preference was primarily related to the benefit inherent in the name. For example, *eco* was preferred because it showed the products are good for the environment, *animal-free* was preferred because it showed the products do not harm animals, and *next-gen* was preferred because it showed that the products are innovative. Nomenclature choices are highly context-dependent; selection of names or descriptor terms can be selected for specific contexts based on the qualities they convey. For detailed assessment of the reasons for preferring each name, please see the summary table and charts in Appendix C.

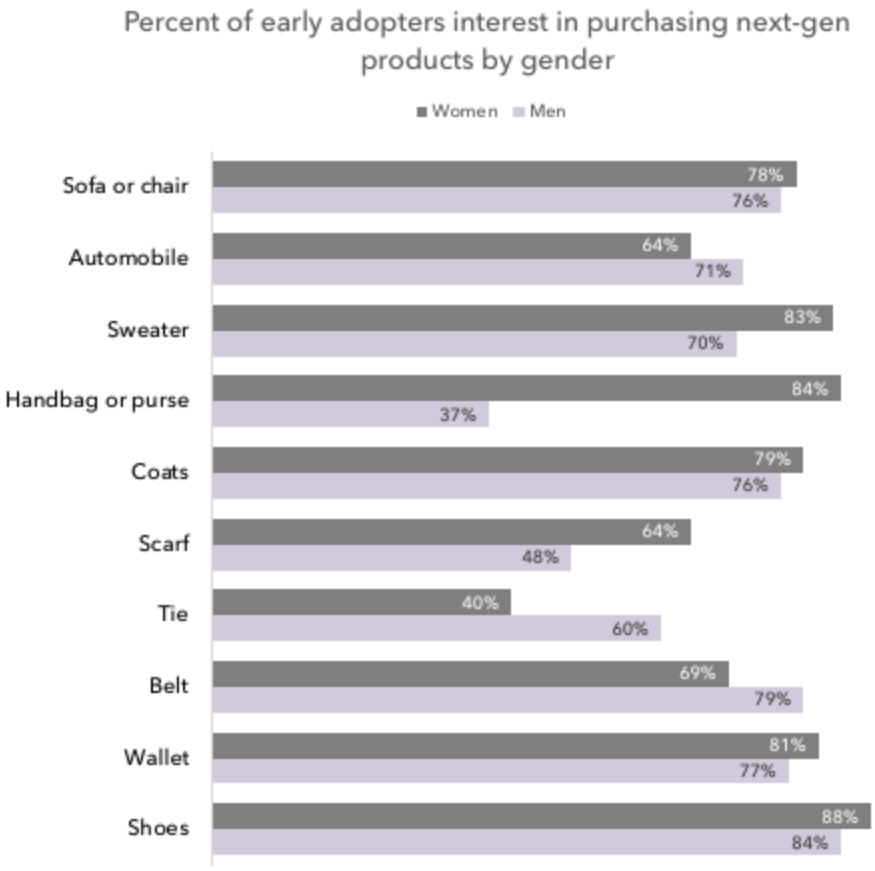
Production technologies

In terms of purchase intention among the early adopters, the likelihood of purchasing products was higher for products made with familiar production technologies. Recycled materials (75% highly likely to purchase), biodegradable materials (68%), and materials sourced from plants/algae/fungi (57%) were the most likely to be purchased. Early adopters reported a lower likelihood of purchasing products made using less familiar/more technical production technologies, including biopolymers (45%) cell-cultivation (43%), and greenhouse gas inputs (41%). Importantly, participants were only provided a short phrase describing each technology and benefits were not described. However, purchase likelihood may increase with awareness and education, as has been found in the case of cultivated meat (Szejda et al., 2021).



Product types

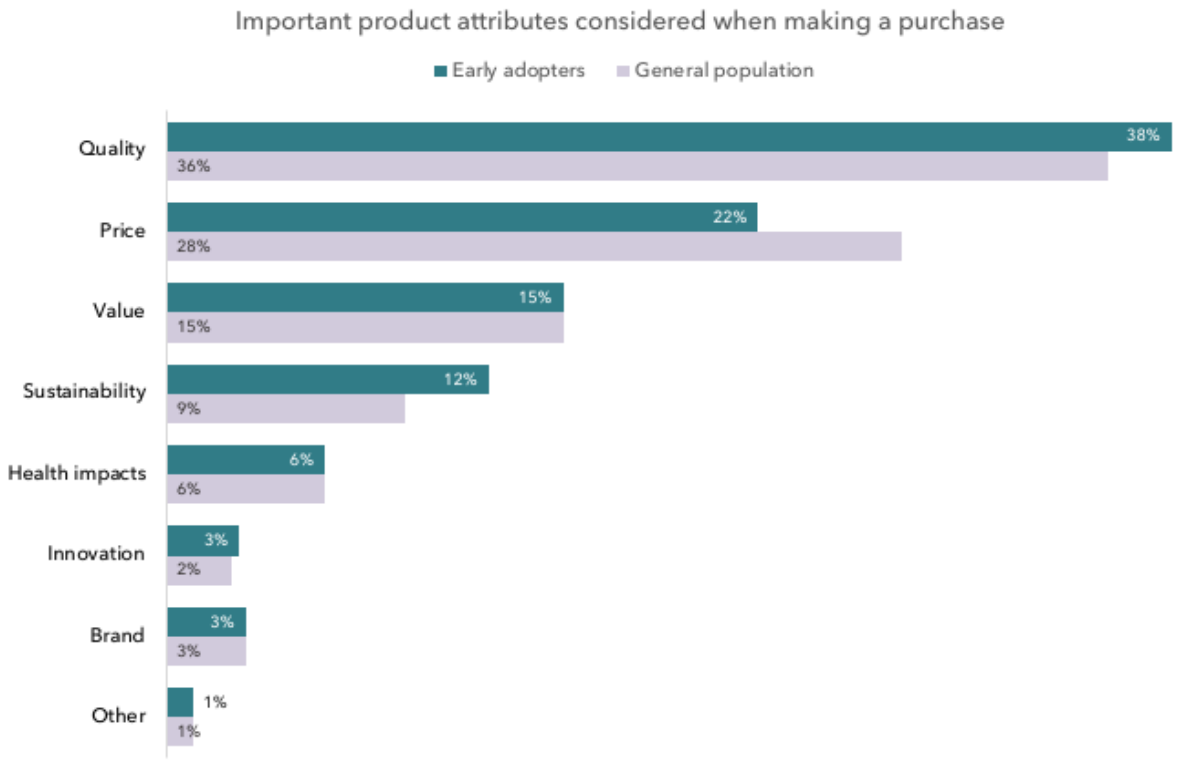
For the question about purchases of product types, we asked participants to assume a future in which next-gen materials were widely available, affordable, and high quality. For each product type, participants indicated whether they would purchase conventional, next-gen, or none in the next five years. Half or more of early adopters indicated they would purchase the following next-gen products in the next five years: shoes (86% would purchase next-gen), wallet (79%), coats (78%), sweater (77%), sofa or chair (77%), belt (74%), automobile (67%), handbag or purse (61%), scarf (56%), and tie (49%). In the chart below, we report the percentages for men and women for purchasing each next-gen product type.



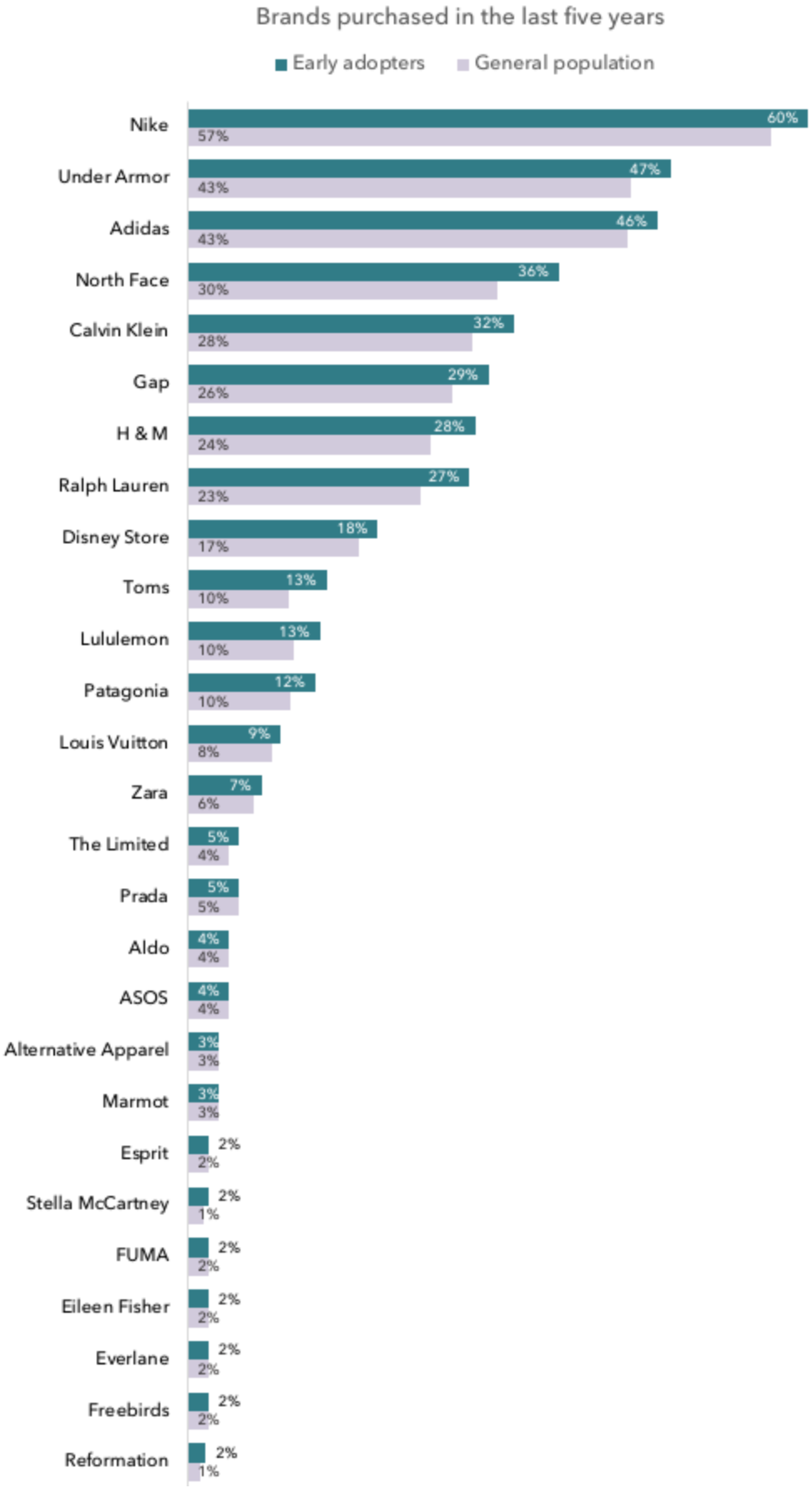
Shopping habits: Attributes and brands

We asked participants to state the attributes they consider most often when purchasing fashion, automotive, and homegoods products. Quality was by far the most considered attribute by early adopters, followed by price, value, and sustainability. In comparison to the general population, price was the only attribute less often considered important by the early adopter segment. Early adopters have purchased from a variety of brands in the past five years. The most commonly purchased brand was Nike (60% had purchased), followed by Under Armor (47%) and Adidas (46%). North Face (36%), Calvin Klein (32%), Gap (29%), H & M (28%), and Ralph Lauren (27%) were also fairly common brands.

Attributes


Important product attributes considered when making a purchase
Early adopters
General population
Quality
38%
36%
Price
22%
28%
Value
15%
15%
Sustainability
12%
9%
Health impacts
6%
6%
Innovation
3%
2%
Brand
3%
3%
Other
1%
1%

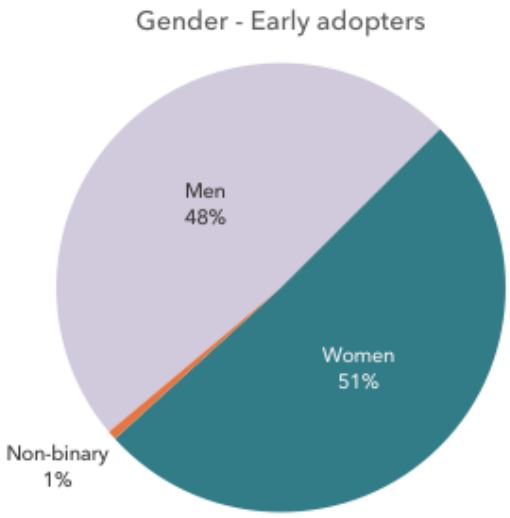
Brands

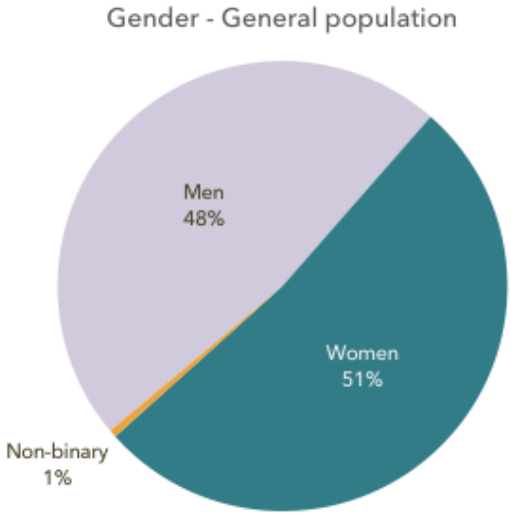

Brands purchased in the last five years
Early adopters
General population
Nike
60%
57%
Under Armor
47%
43%
Adidas
46%
43%
North Face
36%
30%
Calvin Klein
32%
28%
Gap
29%
26%
H & M
28%
24%
Ralph Lauren
27%
23%
Disney Store
18%
17%
Toms
13%
10%
Lululemon
13%
10%
Patagonia
12%
10%
Louis Vuitton
9%
8%
Zara
7%
6%
The Limited
5%
4%
Prada
5%
5%
Aldo
4%
4%
ASOS
4%
4%
Alternative Apparel
3%
3%
Marmot
3%
3%
Esprit
2%
2%
Stella McCartney
2%
1%
FUMA
2%
2%
Eileen Fisher
2%
2%
Everlane
2%
2%
Freebirds
2%
2%
Reformation
2%
1%

Sociodemographics

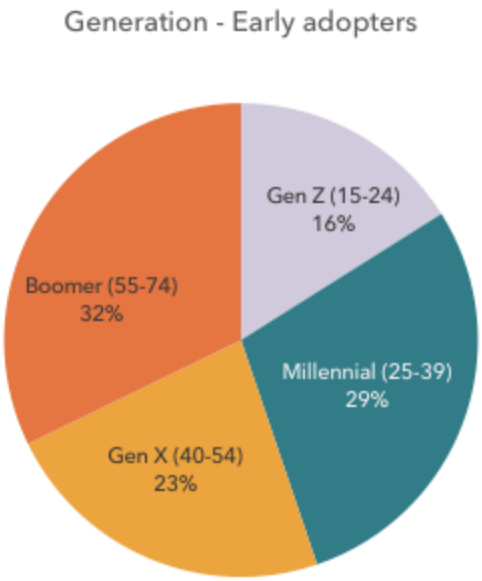
Overall, the sociodemographic characteristics of early adopters were very similar to the general population. Both segments were essentially the same in terms of age, gender, region, and race/ethnicity. The early adopter population was very slightly more educated, higher income earning, and more liberal.

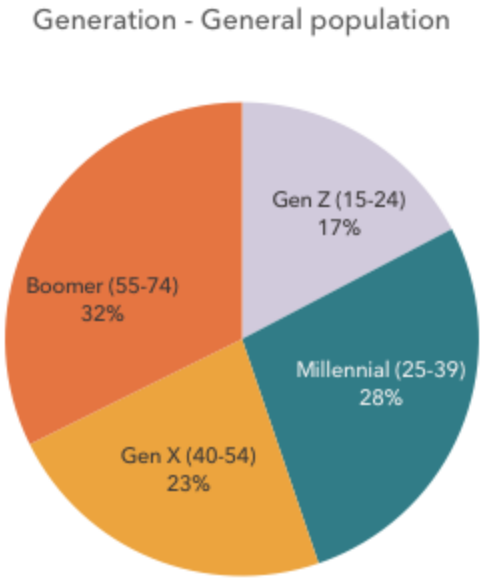
Gender



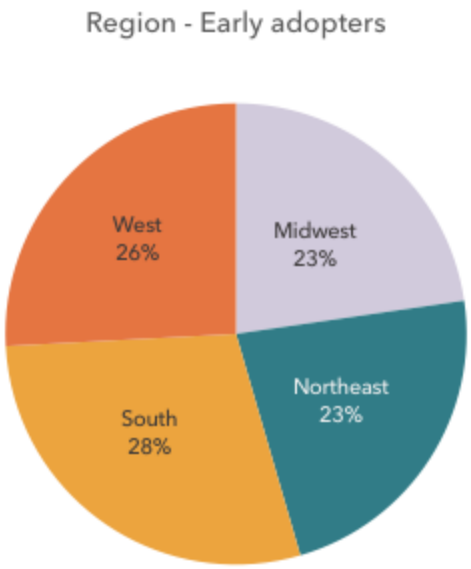


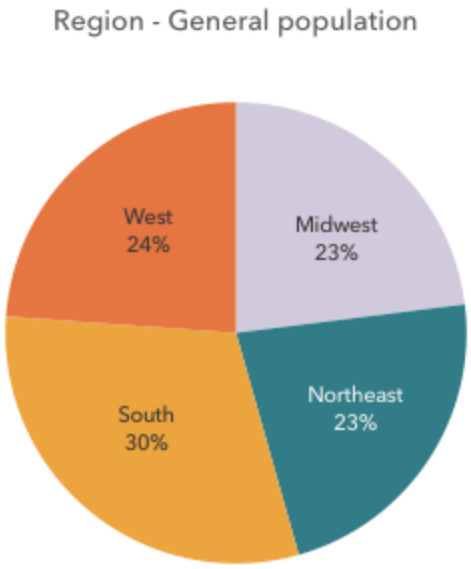
Age (generations)



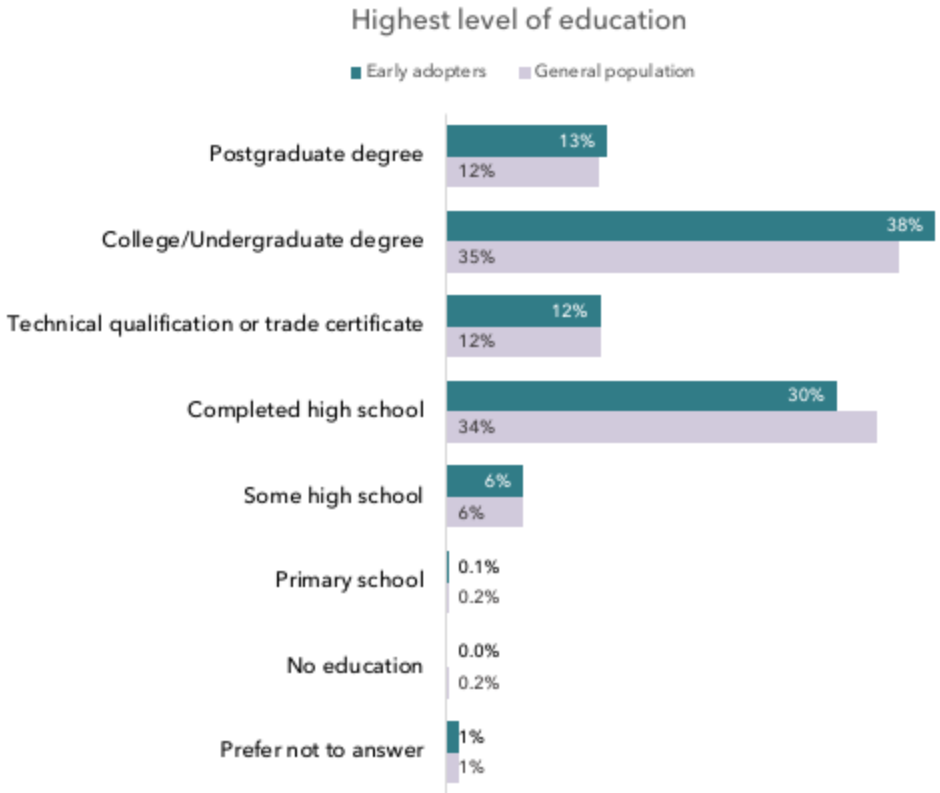


Region

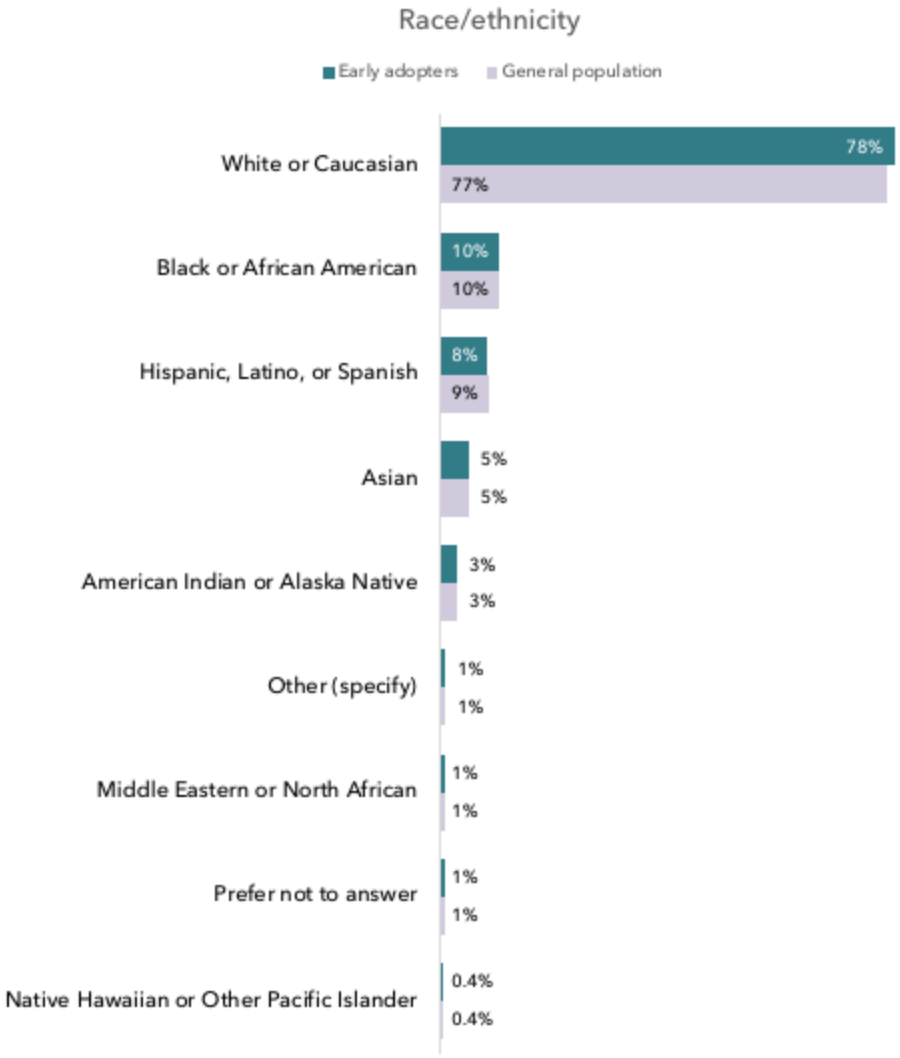




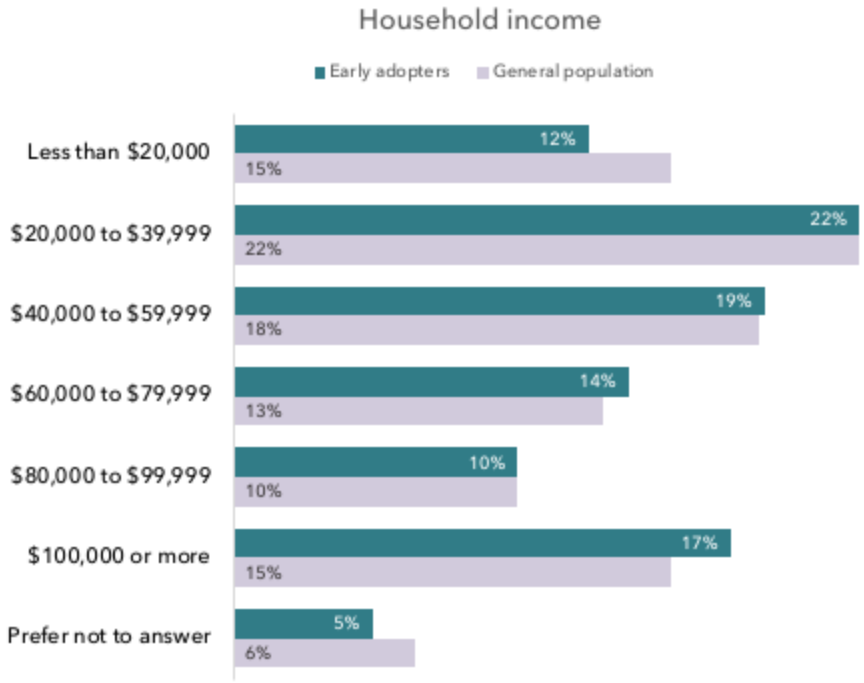
Education



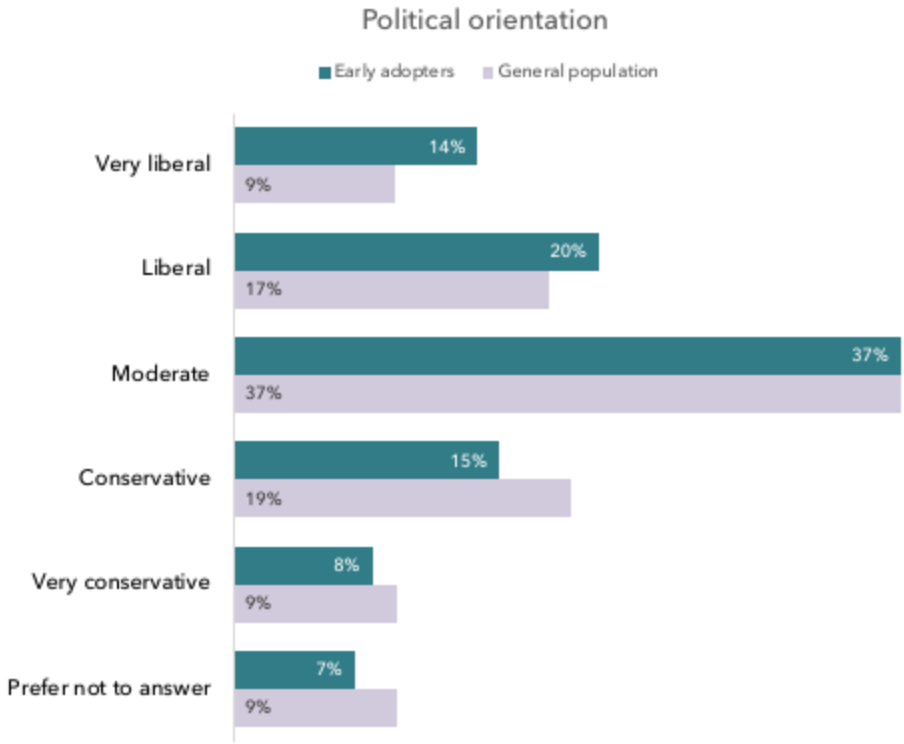
Race/ethnicity



Household income



Political orientation



Conclusion

This large representative study found a high degree of interest in next-gen materials among the U.S. population. Nearly all participants (94%) stated they were at least somewhat likely to purchase next-gen materials, and nearly half (45%) were highly likely to purchase. Interest in purchasing was consistent across the four generations and across the four geographic regions. Consumers were also willing to pay more for next-gen materials: 60% of early adopters were willing to pay more, and younger generations (Gen Z, Millennials, and Gen X) were more likely to pay more than Boomers. Estimated market share of next-gen products was over half of total purchases for each material subcategory: 54% of leather, 57% of wool, 60% of silk, 61% of down, 66% of fur, and 63% of exotic skins.

The study also reported the early adopter segments' product preferences. Half or more of early adopters were interested in purchasing each product type surveyed, with shoes being of the greatest interest (86%). Likelihood of purchasing products was higher for products made with familiar production technologies, including recycled materials, biodegradable materials, and materials sourced from plants, algae, or fungi. Environmental benefits, animal welfare, and quality were top reasons for purchasing next-gen materials. Overall, name preference was primarily related to the benefit inherent in the name; *eco*, *animal-free*, and *next-gen* were the most preferred names.

In terms of shopping habits among the early adopters, quality was the most frequently selected attribute when making a purchase, followed by price, value, and sustainability. Nike, Under Armor, and Adidas were the brands most frequently purchased by early adopters. Early adopters share very similar sociodemographic characteristics as the general population, suggesting that next-gen materials are likely to be widely adopted among the diverse segments of U.S. society.

Targeting early adopters is a key step in long-term societal adoption, as subsequent population segments watch and later adopt after the innovation begins to normalize in society. This study outlines the landscape of potential consumer adoption among the U.S. population, as well as the product preferences, shopping habits, and sociodemographic profile of the early adopter segment.

About North Mountain Consulting Group

North Mountain Consulting Group is a research and communication consulting firm that helps organizations develop evidence-based strategies for a sustainable food system. Our team of researchers combines the integrity and rigor of social science research methods with communication expertise to develop effective communication strategies. We specialize in understanding and influencing the consumer landscapes of emerging technologies in the food and material sectors.

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Appendix A: Sampling Quotas

Gender Identity

	Study sample	Sampling Goal Based on U.S. Census
Man	47%	49%
Woman	52%	51%
Non-binary	1%	-
Other	0%	-

Note: The sample had a slight underrepresentation of males.

Generational Category

	Study sample	Sampling Goal Based on U.S. Census
Generation Z (15-24)	17%	17%
Millennials (25-39)	27%	28%
Generation X (40-54)	23%	25%
Baby boomers (55-74)	32%	30%

Note: Participants were recruited to match the U.S. population age 15-74 in ranges each spanning four years. We then collapsed those groups into generational categories.

Geographic Region

	Study sample	Sampling Goal Based on U.S. Census
Northeast	23%	17%
Midwest	23%	21%
South	31%	38%
West	24%	24%

Note: The sample had slight underrepresentation from the Southern region and overrepresentation from the Northeastern region.

Appendix B: Description of New Materials

In the last few years, rapid advances in science and technology have given rise to a new materials industry. Mission-driven companies are designing new types of materials for fashion, automobile, and homegoods products.

These materials can be used to make high-performance products such as:

- beautiful and durable handbags, wallets, sweaters, and shoes
- soft and functional sofa, chair, and automobile upholstery
- warm jackets and comforters

These materials are made using a variety of technologies:

- Leather, wool, fur, and down can be replicated by using natural components from plants, algae, and fungi
- Leather and silk can be grown directly from cells, bypassing the animal but resulting in an identical product

Although made in different ways, these materials are all:

- High performance
- More sustainable
- Animal-free

Appendix C: Reasons for Nomenclature Preferences

Table showing reasons for individual nomenclature preferences

To learn the reasons why consumers preferred a specific name, explore by column. The columns are ordered by the percentage of early adopters who preferred each name: *eco* (preferred by 28%), *animal-free* (21%), *next-gen* (19%), *bio-based* (10%), *alternative* (10%), *vegan* (7%), and *bio* (6%).

Or, explore by row to learn the degree to which each name was associated with each specific reason/benefit. There is one highlighted cell per row to indicate the highest percentage for each reason.

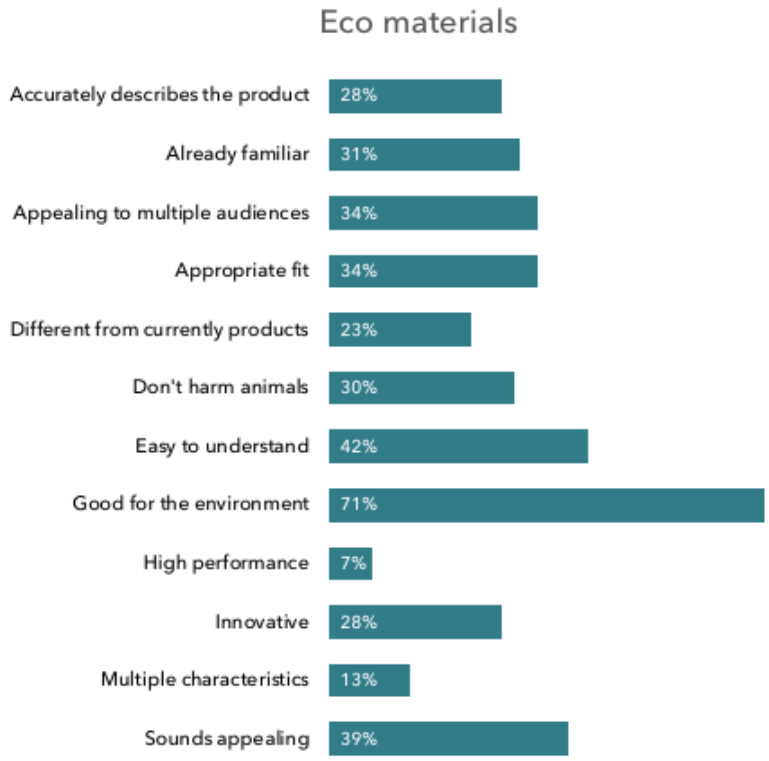
Reasons/Benefits	Names						
	eco materials	animal-free materials	next-gen materials	bio-based materials	alternative materials	vegan materials	bio materials
shows that the products are good for the environment	71%	37%	16%	51%	20%	41%	45%
is easy to understand	42%	48%	33%	37%	47%	38%	36%
shows that the products do not harm animals	30%	77%	17%	38%	17%	72%	25%
sounds appealing	39%	33%	48%	39%	30%	20%	34%
is appealing to multiple audiences	34%	37%	43%	29%	35%	30%	21%
is an appropriate fit	34%	29%	32%	33%	44%	23%	32%
shows that the products are innovative	28%	23%	55%	35%	34%	11%	27%
shows that the products are different from currently available products	23%	24%	47%	39%	50%	9%	34%
accurately describes the products	28%	37%	22%	43%	36%	23%	23%
is already a familiar term	31%	26%	17%	13%	22%	47%	16%
shows that the products have multiple characteristics	13%	10%	21%	14%	30%	8%	14%
shows that the products are high performance	7%	8%	33%	9%	10%	6%	11%

Charts showing reasons for individual nomenclature preference

The following charts display the reasons consumers preferred each name.

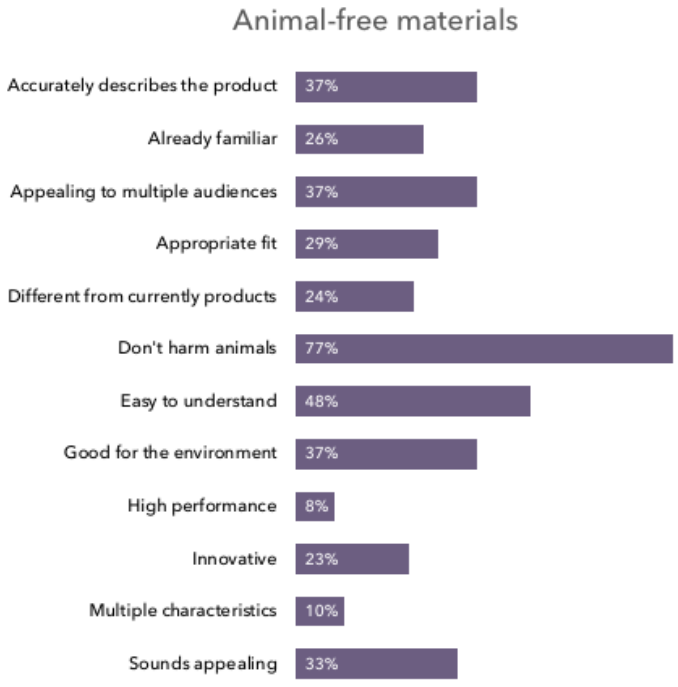
Eco materials

Eco materials was selected as the preferred nomenclature option by 28% of early adopters.



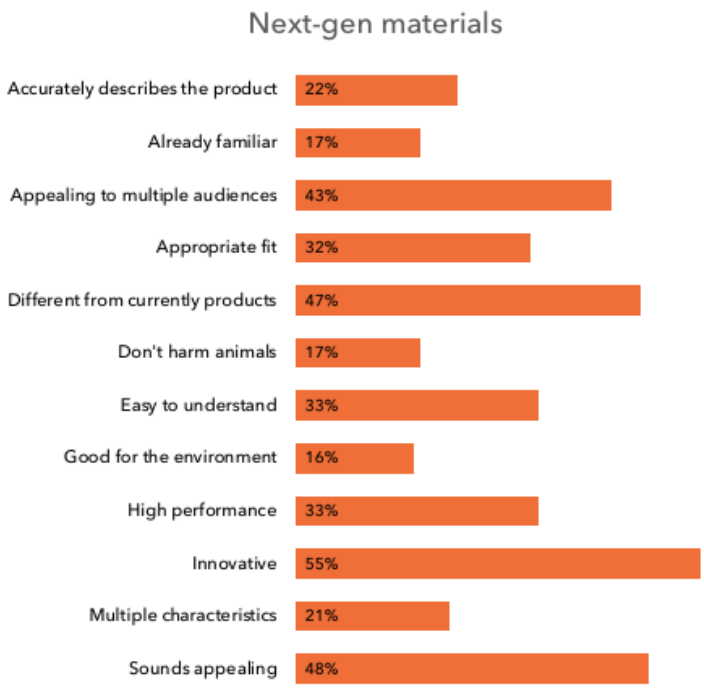
Animal-free materials

Animal-free materials was selected as the preferred nomenclature option by 21% of early adopters.



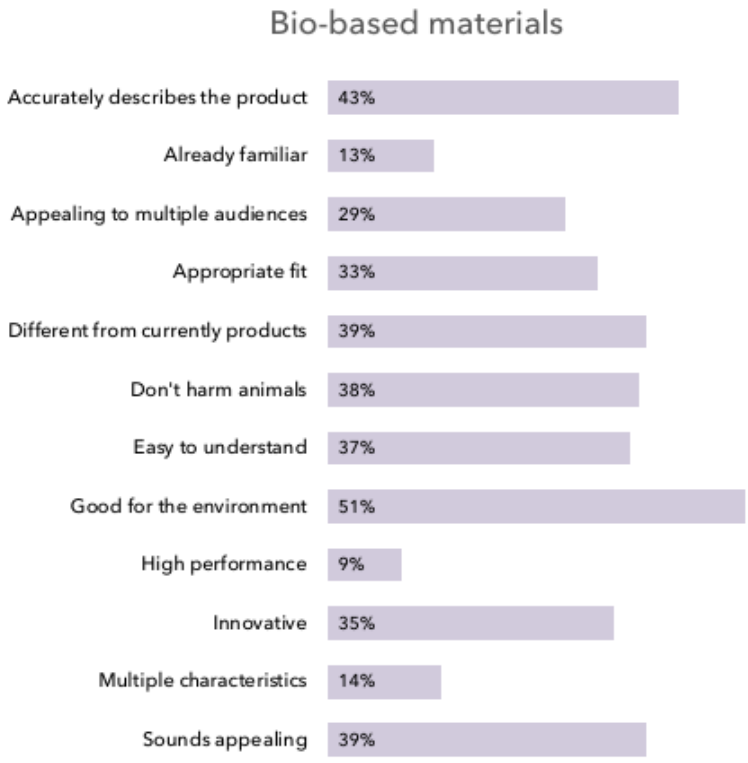
Next-gen materials

Next-gen materials was selected as the preferred nomenclature option by 19% of early adopters.



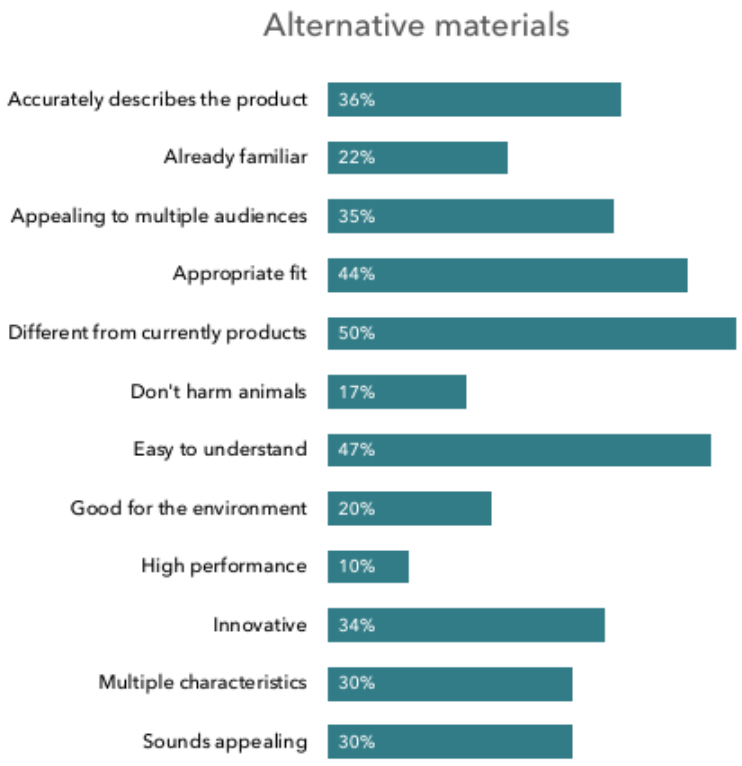
Bio-based materials

Bio-based materials was selected as the preferred nomenclature option by 10% of early adopters.



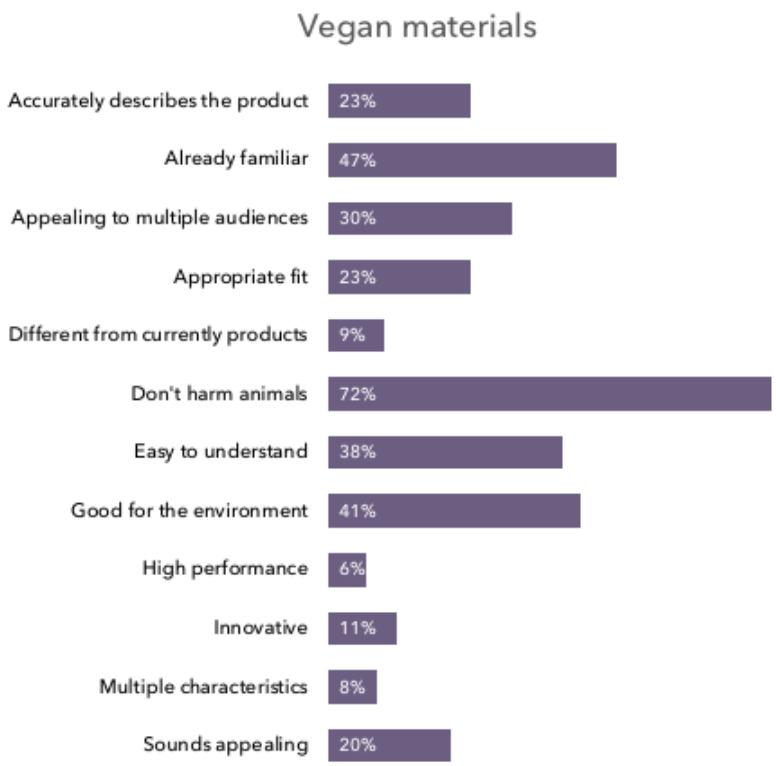
Alternative materials

Alternative materials was selected as the preferred nomenclature option by 10% of early adopters.



Vegan materials

Vegan materials was selected as the preferred nomenclature option by 7% of early adopters.



Bio materials

Bio materials was selected as the preferred nomenclature option by 6% of early adopters.