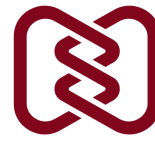


North Mountain
CONSULTING GROUP



MATERIAL
INNOVATION
INITIATIVE

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ALTERNATIVES TO LEATHER: AN EXPLORATORY STUDY OF US CONSUMER PERCEPTIONS

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EXECUTIVE SUMMARY

This exploratory study examined U.S. consumer purchasing preferences for leather and leather alternatives. We collected survey responses from a sample of 519 individuals across the U.S. through Amazon Mechanical Turk. We segmented consumers by whether they preferred animal leather or leather alternatives. Those who preferred animal leather (45%) appreciate that the product was high quality, durable, and authentic, and enjoy the soft feel, smell, and breathability. Those who preferred leather alternatives (55%) appreciate the altruistic benefit for animals and the environment, while enjoying the affordability and low maintenance aspects of the products. Being animal-free and affordable were the top attributes of leather alternatives for both consumer segments.

The majority of consumers were open to purchasing all three alternative leather types (acrylic/polyester, plant fibers, or cell-cultured). Those who prefer animal leather were most open to purchasing leather made from plant fibers or cell-cultured leather, while those who prefer alternative leather were most open to purchasing leather made from plant-fibers or acrylic/polyester. About $\frac{2}{3}$ of those who prefer alternatives would pay more for them, while nearly $\frac{1}{2}$ of those who prefer animal leather nevertheless indicated they would be willing to pay more for alternatives. Participants might have gained interest in alternatives after considering the three specific alternative leather technology types.

Finally, participants assessed the appeal of different message frames (animals, environment, technology, performance, or fashion). Regardless of preference for animal leather or leather alternatives, participants most frequently rated the animal frame as the most appealing, followed by the sustainability frame, and third the performance (quality/durability) frame.

The findings from this exploratory study will serve to provide the preliminary groundwork for communication strategy and product development. Further consumer research, especially nationally representative studies that focus on consumer segmentation and message design, will provide more concrete direction for understanding U.S. consumer preferences toward leather alternatives.



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Introduction

Animal materials have a variety of applications across some of the world's biggest industries, including the fashion, automotive, and home goods industries. The value of the global fashion market alone was 300 billion USD in 2019 ([Market Insight Reports, 2020](#)). Leather in particular is ubiquitous across the fashion, homegoods, and automotive industries, with a global value of 414 billion USD in 2017 ([Grandview Research, 2019](#)). Although consumers appreciate the quality of leather, there is rising concern regarding production impacts on the environment and animal welfare, giving rise to the desire for high quality alternatives that are in line with consumers' values. This expectation of values orientation in fashion choices is especially prominent among younger generations ([McKinsey & Company, 2017](#)).

The purpose of this research project is to obtain preliminary data on consumer interest in and reasons for purchasing leather alternatives, as well as consumer perceptions of product attributes, openness to different production technologies, pricing, and preferences for message framing. Currently, a dearth of data exists regarding consumer acceptance of leather alternatives. This exploratory study begins a research agenda to better understand consumer attitudes and behavior toward an emerging category of alternative materials that are high performance, more sustainable, and animal-free.



METHOD

PROCEDURES

Research participants answered a series of questions about their purchasing practices and preferences toward leather and leather alternatives. The survey also included an embedded attention check and sociodemographic measures.

MEASURES AND MATERIALS

We asked a series of questions relating to consumer attitudes and purchasing intentions. Material preference was measured using multiple choice format (either *animal leather* or *leather alternative*). Reasons for their material type preference were assessed using an open-ended question. Leather alternative attributes were measured on a five-point scale (*strongly disagree* to *strongly agree*). Technology preferences were measured on a five-point scale (*not at all likely* to *extremely likely*). Pricing was measured with a multiple choice question (*I would not pay more, 10%, 25%, 50%, and 100% more*). Message frame preference was measured by ranking five message frames in terms of appeal. Those message frames focused on the benefits of alternative leather, including the following benefits: animal welfare, the environment, performance of the material, technology aspect of the material, and fashion.

SAMPLE

We obtained the sample of 519 participants from Amazon Mechanical Turk. Participants were included in the study if they resided in the U.S., were aged 18-74 (Gen Z, Millennials, Gen X, or Boomers), fully completed the questions about materials, and passed an attention check.

Participants reported their demographic information including age, gender, income, and region. The reported gender in the sample was 53% female, 46% male, and 1% other. The average age was 35 years, and ranged from 19-72. Participants were diverse geographically and financially. Demographic characteristics of the sample can be found in [Appendix A](#).

ANALYSIS PLAN

We reported the results for two groups of participants: those with a preference for animal leather, and those with a preference for leather alternatives.

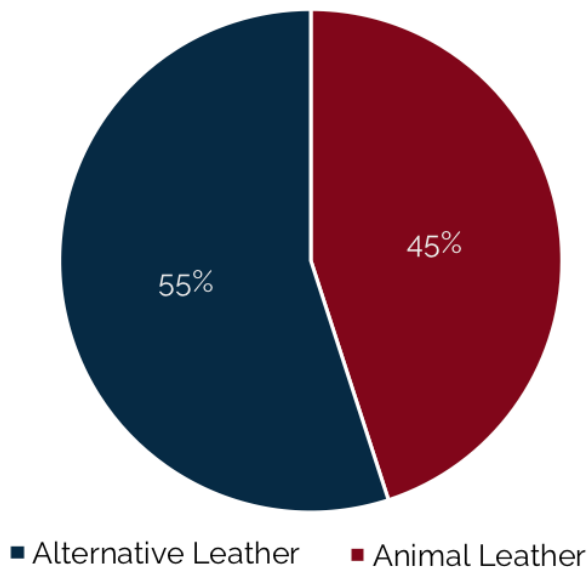
KEY RESULTS

PURCHASE PREFERENCES

PREFERRED PRODUCT TYPE

We asked participants to select their preferred material type: animal leather or alternative leather. More than half (55%) preferred a leather alternative.

Material Preference:
Animal Leather or Alternative Leather



REASONS FOR PREFERRING ANIMAL LEATHER

We asked the participants who preferred animal leather to explain the reasoning behind their preference.

Those who prefer animal leather frequently mentioned these qualities about animal leather products:

- High quality
- Durability
- Genuine or authentic
- Sensory experience: feels soft, smells good
- Breathability

- Brings status or prestige
- Lack of suitable alternatives

Exemplary quotes

- *"I prefer the durability, reliability, and feel of real leather. Too many times have I had fake leather or leather alternatives deteriorate on me."*
- *"The feel and wearing/aging of leather has not been reproducible at present"*
- *"I find anything that is 'pretend' leather causes me to sweat. As well as a good breathable fabric, it is long lasting, and hard wearing."*
- *"I prefer leather products because of the status. It's like choosing to buy diamonds over crystals."*
- *"Because overall vinyl is unsatisfactory in many cases."*

REASONS FOR PREFERRING LEATHER ALTERNATIVES

We asked the participants who preferred leather alternatives to explain the reasoning behind their preference.

Those who prefer leather alternatives frequently mentioned these qualities about the leather alternative products:

- Animals
- Environment
- Affordability
- Lower maintenance
- Disgust for leather

Exemplary quotes

- *"I don't like harming animals for materialistic things."*
- *"I sometimes feel guilty for buying leather items knowing they come from animals. An alternative to leather would make me feel better about my purchases."*
- *"It's safer for animals -- not that I'm an extremely big advocate for animals, but if the alternative functions the same, I do not see the reason not to go with it."*
- *"We do not need to be raising more cattle or clearing more forest land for accessories. The planet is not doing well at the moment."*
- *"I think fake leather is just as nice and is usually a lot cheaper. Also, it grosses me out a little that leather is animal skin."*
- *"Because it looks just as good and care is easier."*
- *"They are less expensive and better for the environment, plus there is less upkeep on them."*

ATTRIBUTES OF LEATHER ALTERNATIVES

Participants were asked the extent to which they agreed or disagreed with eight attributes of alternative leather. Alternative leather was defined as '*products which look and function like leather but do not come from an animal*'. Rates of agreement were overall higher among those who prefer alternative leather.

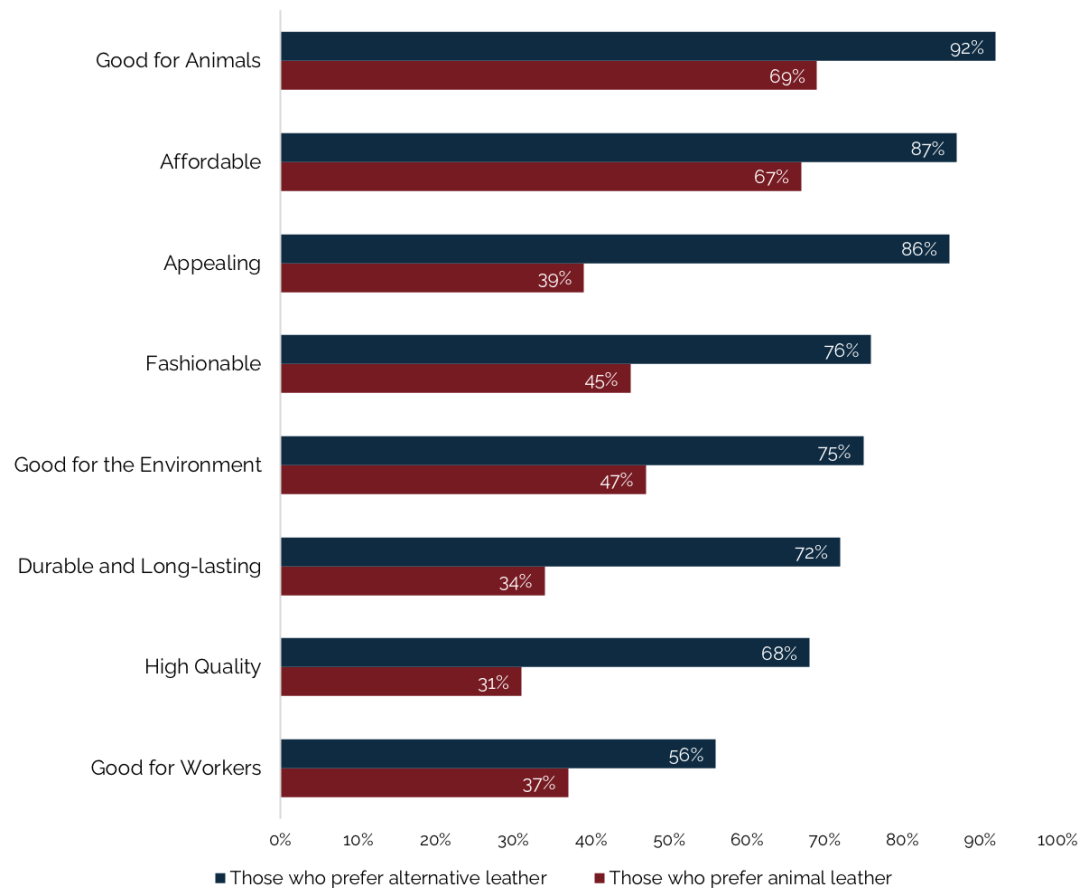
Among those who prefer animal leather:

- 69% thought that alternative leather was good for animals
- 67% thought that alternative leather was affordable
- 39% thought that alternative leather was appealing
- 45% thought that alternative leather was fashionable
- 47% thought that alternative leather was good for the environment
- 34% thought that alternative leather was durable and long-lasting
- 31% thought that alternative leather was high quality
- 37% thought that alternative leather was good for workers

Among those who prefer alternative leather:

- 92% thought that alternative leather was good for animals
- 87% thought that alternative leather was affordable
- 86% thought that alternative leather was appealing
- 76% thought that alternative leather was fashionable
- 75% thought that alternative leather was good for the environment
- 72% thought that alternative leather was durable and long-lasting
- 68% thought that alternative leather was high quality
- 56% thought that alternative leather was good for workers

Percentage of Participants who Agreed with Each Attribute Statement About Alternative Leather



Note: The percentage includes both participants who 'agreed' or 'strongly agreed' with each statement.

TECHNOLOGY PREFERENCES

We asked participants their degree of likelihood toward purchasing alternative leather made using specific materials. We categorized those who stated they were 'somewhat' or 'moderately' likely to purchase as *hesitant purchasers*. We categorized those who were 'very likely' or 'extremely likely' as *enthusiastic purchasers*. Both groups combined ('somewhat', 'moderately', 'very', or 'extremely' likely) we refer to as *open to purchasing*. Accordingly, we refer to those who indicated they were 'not at all likely' as *not open to purchasing*.

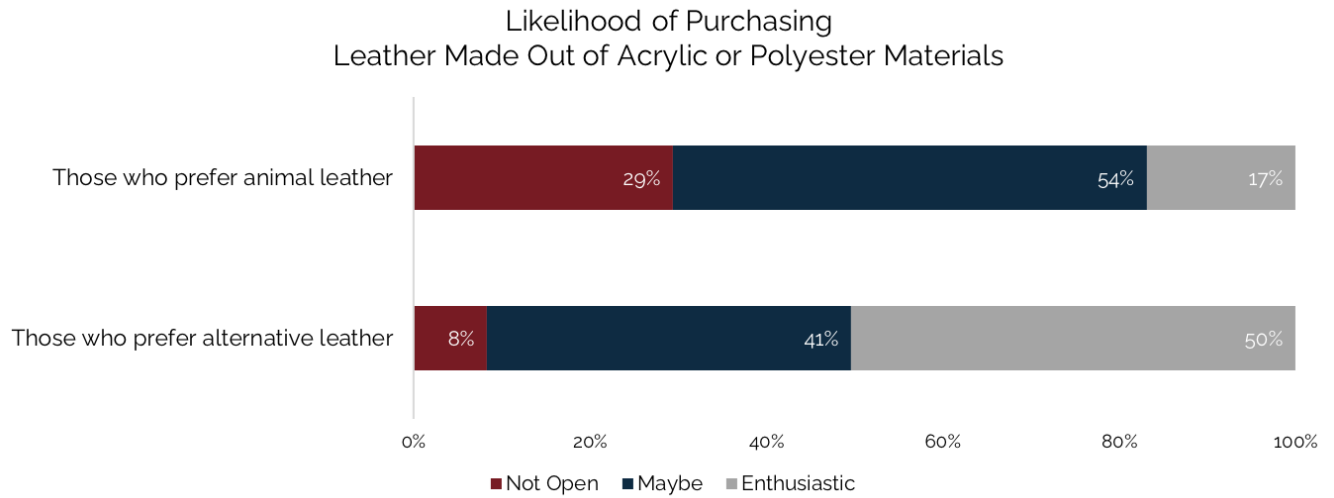
LEATHER MADE OUT OF ACRYLIC OR POLYESTER MATERIALS

Among those who prefer animal leather:

- 71% were open to purchasing
- 17% were enthusiastic about purchasing

Among those who prefer alternative leather:

- 92% were open to purchasing
- 50% were enthusiastic about purchasing



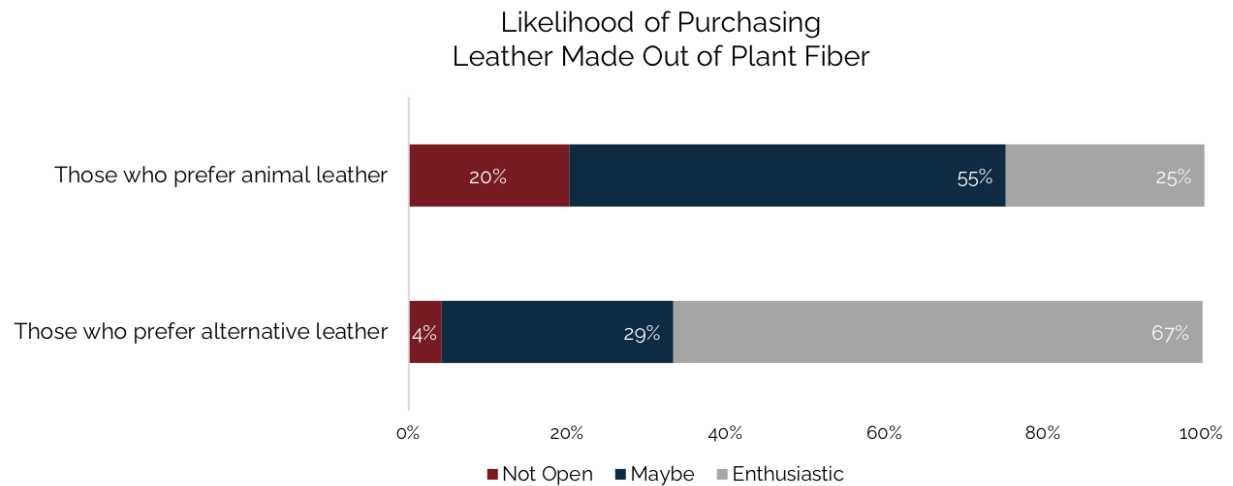
LEATHER MADE OUT OF PLANT FIBERS

Among those who prefer animal leather:

- 80% were open to purchasing
- 25% were enthusiastic about purchasing

Among those who prefer alternative leather:

- 96% were open to purchasing
- 67% were enthusiastic about purchasing



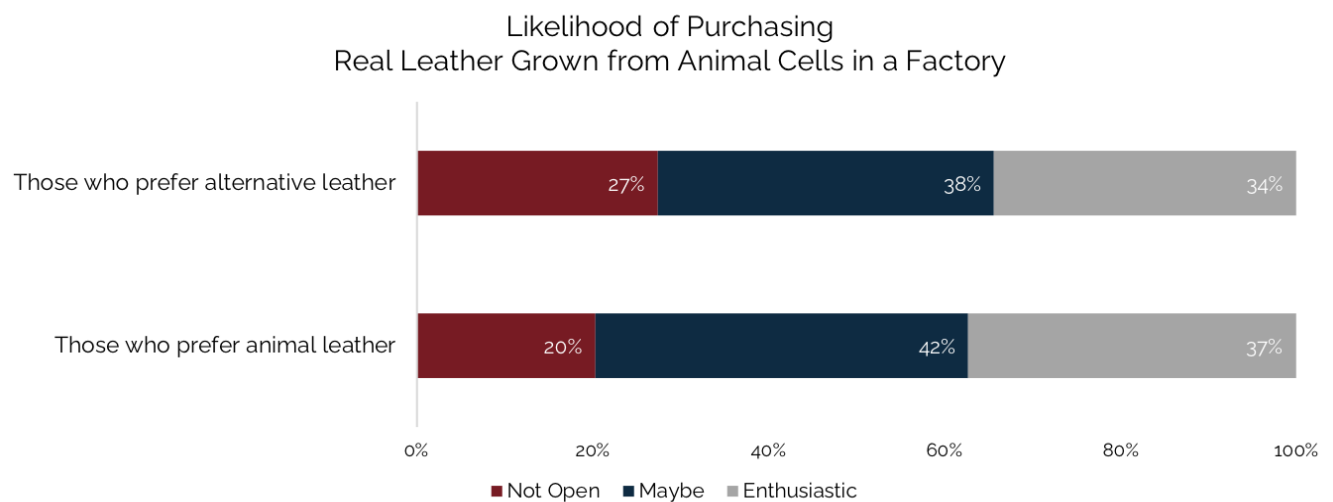
REAL LEATHER GROWN FROM ANIMAL CELLS IN A FACTORY

Among those who prefer animal leather:

- 80% were open to purchasing
- 37% were enthusiastic about purchasing

Among those who prefer alternative leather:

- 73% were open to purchasing
- 34% were enthusiastic about purchasing



PRICING

We asked participants if, and how much more, they would be willing to pay for leather alternatives. Among those who prefer animal leather, 56% would not pay more, 25%

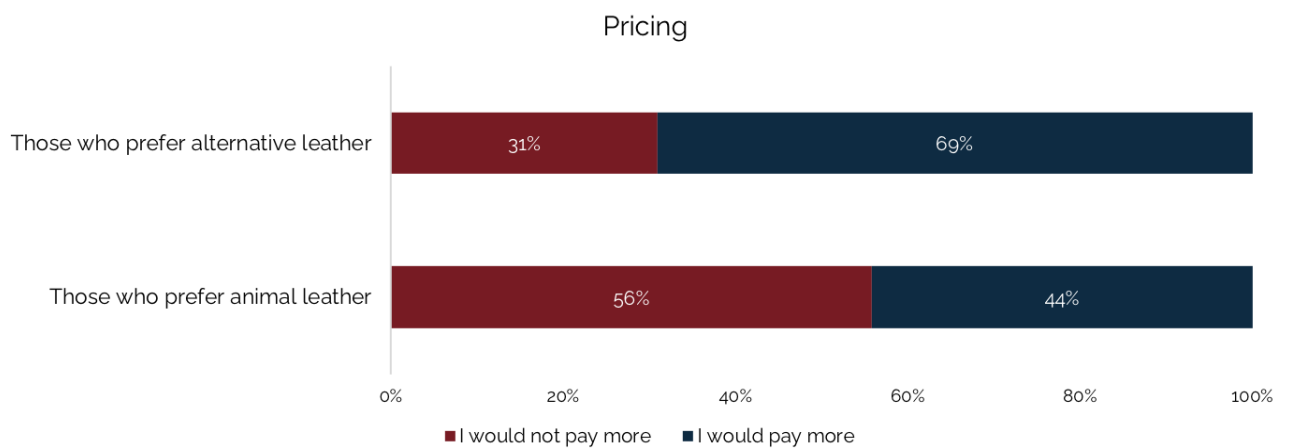
would pay 10% more, 9% would pay 25% more, 9% would pay 50% more, 2% would pay 100% more. Among those who prefer leather alternatives, 31% would not pay more, 39% would pay 10% more, 22% would pay 25% more, 6% would pay 50% more, and 2% would pay 100% more.

Among those who prefer animal leather:

- Overall, 44% would pay more
- 20% would pay at least 25% more

Among those who prefer alternative leather:

- 69% would pay more
- 30% would pay at least 25% more



MESSAGE APPEAL

We asked participants to read a list of five messages, and then to rank the messages in terms of appeal. The message frame texts can be found in [Appendix B](#).

Regardless of preference for animal leather or leather alternatives, participants most frequently rated the animal frame as the most appealing, followed by the sustainability frame, and third the performance (quality/durability) frame. Both the technology and fashion frames were *not* frequently selected as the most appealing message.

Among those who prefer animal leather:

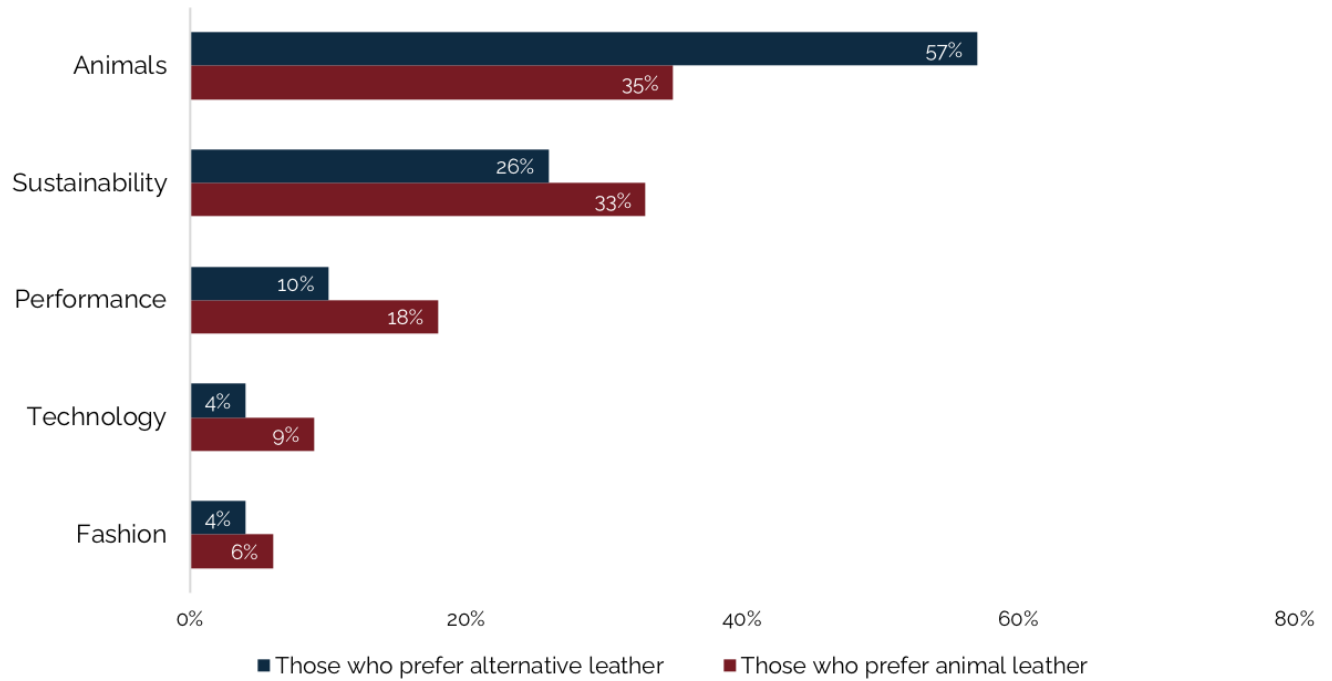
- 35% ranked the animal frame highest in appeal
- 33% ranked the sustainability frame as second highest in appeal
- 18% ranked the performance frame as third highest in appeal

Among those who prefer alternative leather:

- 57% ranked the animal frame as highest in appeal

- 26% ranked the sustainability frame as second highest in appeal
- 10% selected the performance frame as third highest in appeal

Percentage Who Selected Each Message Frame as their Top Choice



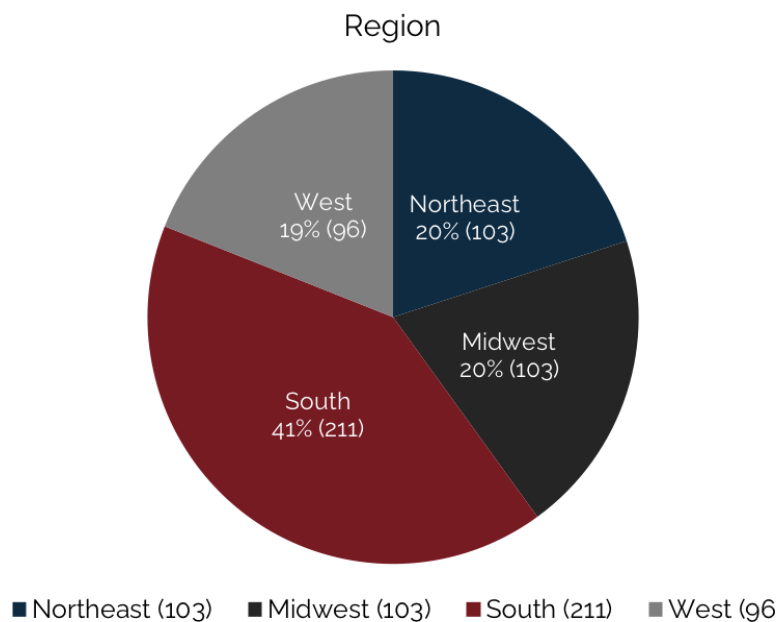
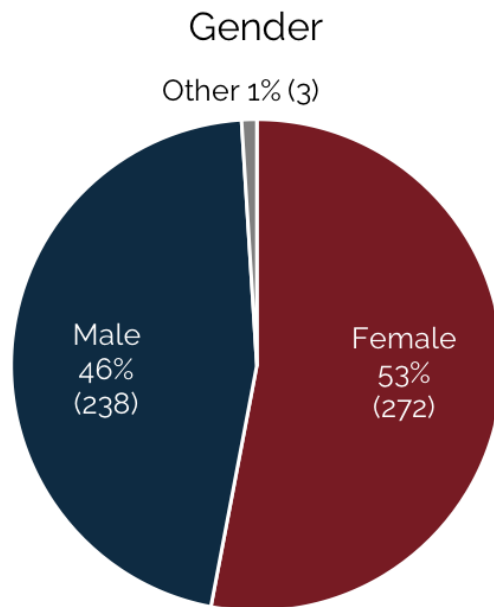


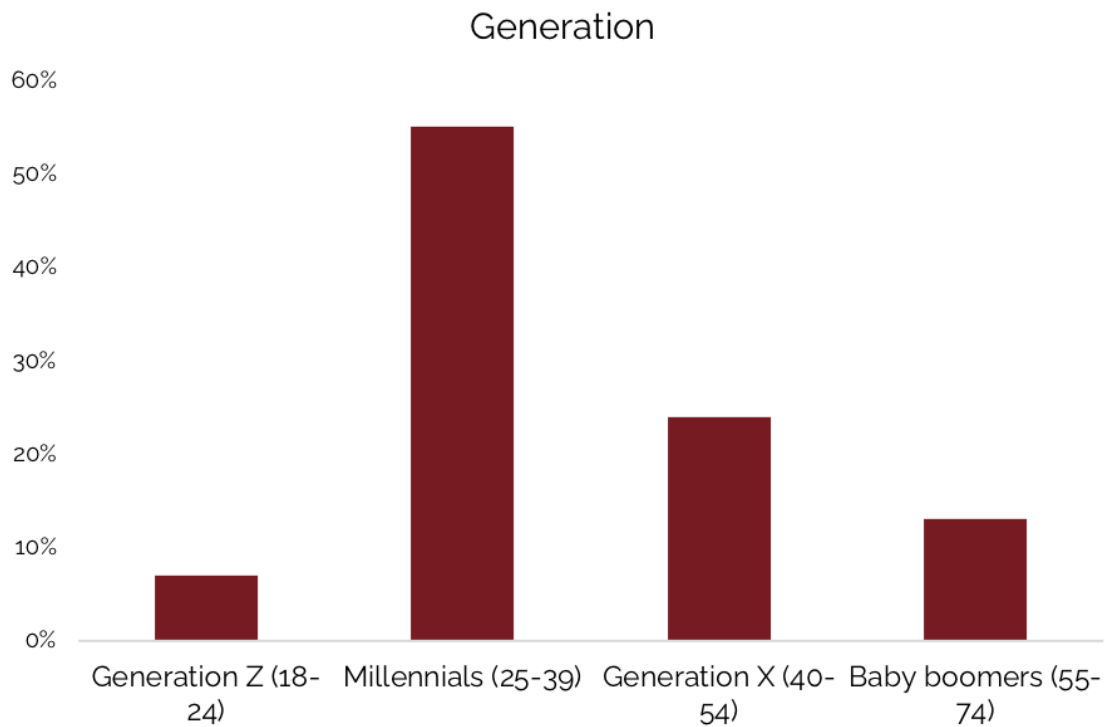
Conclusion

This exploratory study lays the groundwork for understanding consumer preferences, attitudes, and behavior toward alternative leather products. More than half of the participants preferred alternative leather over animal leather; they reported animal welfare and the environment as reasons for their preference. Slightly less than half of the sample preferred products made from animal leather; they reported quality, durability, and sensory properties as reasons for their preference. For both segments, benefits for animals and affordability were top desirable attributes of alternative leather. Participants most often selected animal welfare, sustainability, and performance (quality/durability) as appealing messaging frames. All three technological methods (acrylic/polyester, plant fibers, cell-culturing) for production were of interest to consumers, and the 2/3 of those who prefer alternative leather were willing to pay more.

Depending on whether brands desire to target the overall population or specifically target those who are currently interested in alternative products, these findings can be studied further or applied in the materials industry through focusing production techniques that yield attributes desirable to consumers. Pricing strategies and appealing messages can drive interest and purchasing. Further research is needed to more fully understand U.S. consumer preferences, attitudes, and behavior with respect to alternatives to leather and other types of sustainable and animal-free materials.

APPENDIX A: Demographics







APPENDIX B: Message Frame Text

Animal frame

'Alternatives to animal leather are not made from animal skins and they look the same as animal leather. When you stop purchasing animal leather, you are helping to reduce animal suffering.'

Environment frame

'Alternatives to animal leather are not made from animal skins and they look the same as animal leather. When you stop purchasing animal leather, you are helping reduce greenhouse gasses, use of chemicals, and water pollution.'

Technology frame

'Alternatives to animal leather are not made from animal skins and they look the same as animal leather. Alternative to animal leather are made using highly advanced technology in a state of the art laboratory.'

Performance frame

'Alternatives to animal leather are not made from animal skins and they look the same as animal leather. Alternatives to animal leather perform better and last longer.'

Fashion frame

'Alternatives to animal leather are not made from animal skins and they look the same as animal leather. Celebrities are choosing alternatives to animal derived leather as part of a new fashion trend.'