



Results Leather Survey 2020

Factsheet: Citizens' Panel „Survey on Leather Goods and Consumer Behaviour“

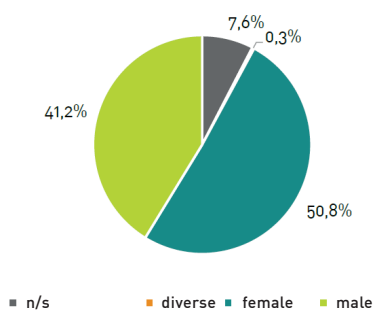
Hanss, Daniel; Helferich, Marvin; Müller, Helena; Rehn-Groenendijk, Jónas; Schenten, Julian; Stoica, Charis | Release: October 2020

Background:

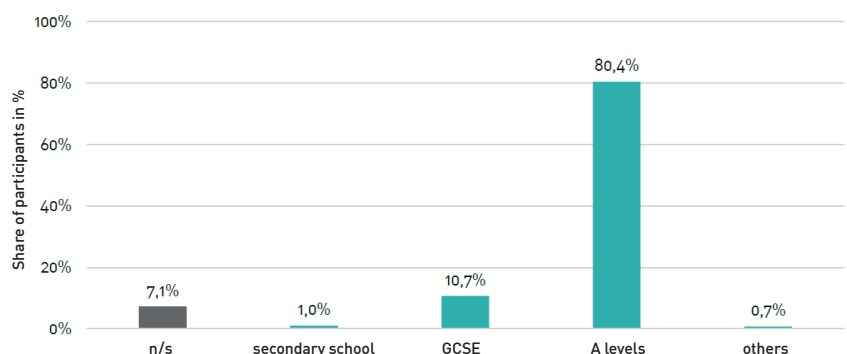
The s:ne project at the Darmstadt University of Applied Sciences facilitates system innovation for sustainable development, by bringing together all relevant actors. The „citizens' panel“ takes up innovation ideas from the s:ne project and enables citizens to express their opinions and preferences on these innovations through surveys. Insights gained from these surveys are incorporated into the further development of the innovations. The manifold perspectives of participating citizens can thus be systematically taken into account in the project activities and the shaping of sustainable development. All surveys are conducted via an online-tool and a participant database. Participants are recruited through random sampling from local citizen registries as well as

informational campaigns and activities. Progress in building a representative sample is documented on the citizens' panel website that also provides information on objectives, ongoing surveys, survey results, opportunities for participation, contacts and cooperation partners. The s:ne project is divided into several focus areas. This survey was designed in cooperation between the citizens' panel and the s:ne focus area „More sustainable chemistry in the leather supply chains“. The survey aims to gain insights in consumers' awareness and attitudes towards leather in general and the issue of chemicals in leather in particular.

Gender



Level of formal education



Sample size:	577
Age:	47,73 (SD= 13,63)
Nationality:	90,2 % German
Region:	Darmstadt-Dieburg
Period:	April - June 2020

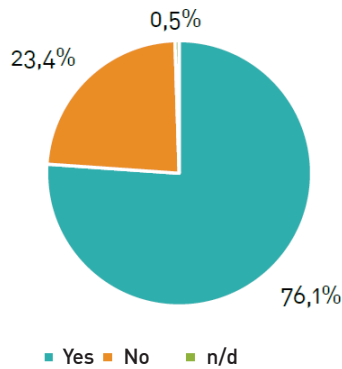
The current composition of the citizens' panel does not exactly represent the population of Germany or even the western world. Although the sample size of 500 - 1100 participants (depending on the survey) is statistically relevant, the average participant has a higher level of education and income and is presumably more environmentally aware than the basic population.

Purchasing of leather or leatherette

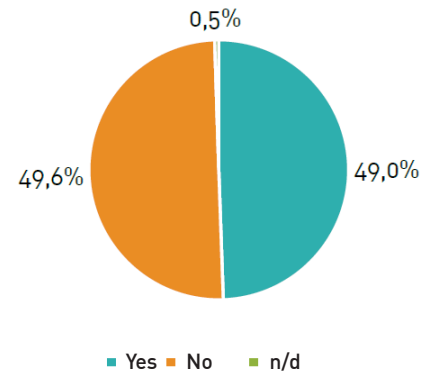
[n=577]

In direct comparison, most participants generally buy leather goods, while only half of the sample in general buys leatherette products.

Do you in general purchase leather goods?



Do you in general purchase leatherette goods?

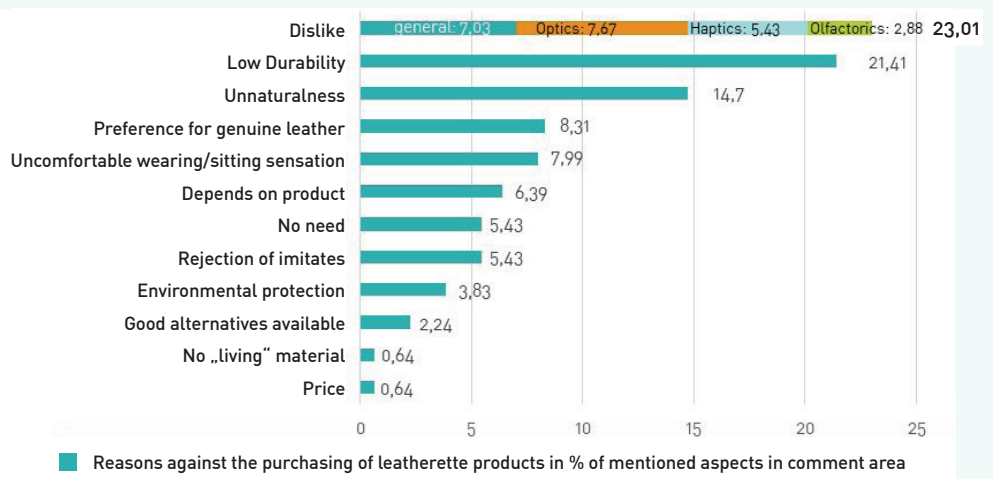


*number of repondents

Reasons against the purchasing of leatherette products

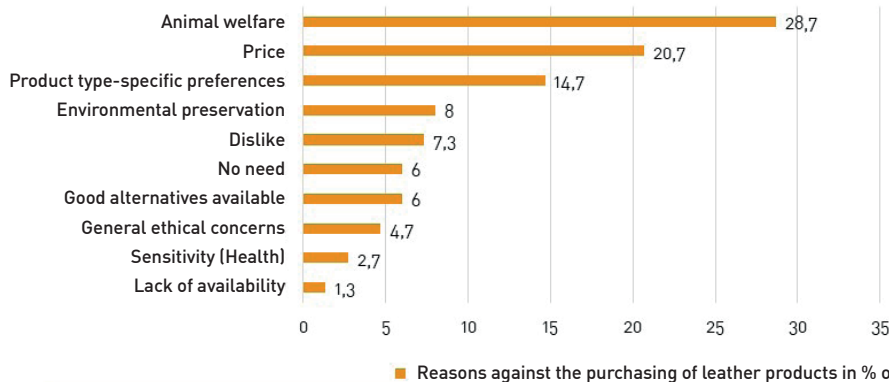
[313 aspects, n=241]

Design and quality are the major drivers that prevent people from buying leatherette products. One could draw the conclusion that if industry closes this gap by developing higher quality leatherette, the competitive pressure for genuine leather will increase.



Reasons against the purchasing of leather products

[150 aspects, n=122]

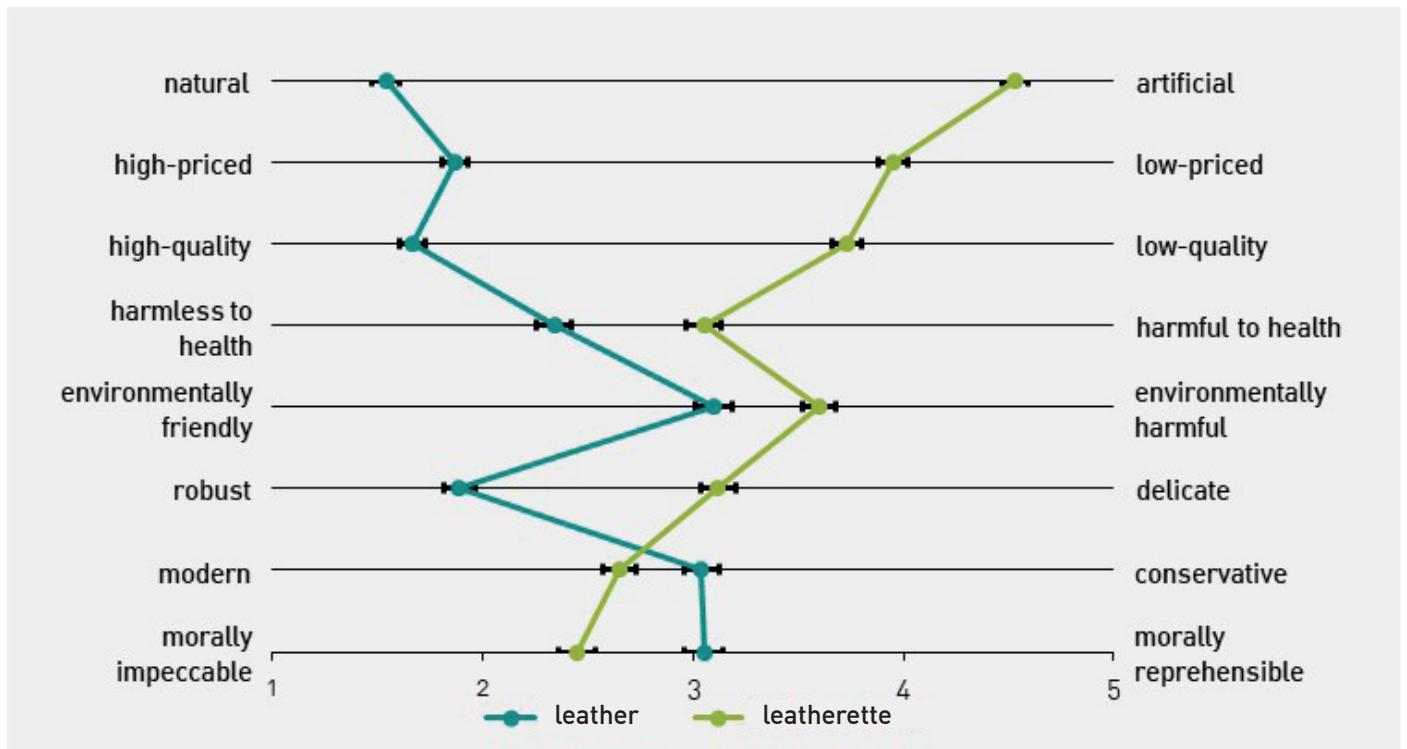


Animal welfare is the most important reason for respondents not to buy leather goods.

Besides, leather seems to be connotated with higher prices.

Perception of leather & leatherette

[n=577]

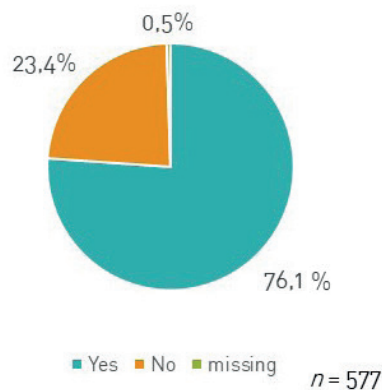


In direct comparison, participants have distinct images of leather and leatherette. For the time being, one might argue that genuine leather is generally perceived as more positive.

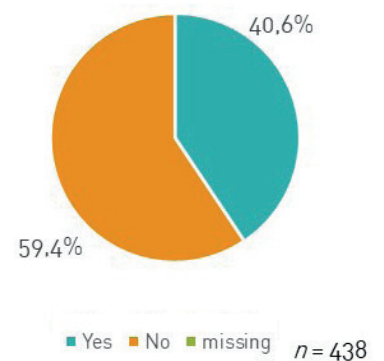
Purchasing of leather care products

The majority of participants buy leather care products while most of them do not pay attention to chemicals contained - despite of an increasing awareness concerning chemicals in consumer products.

Do you in general purchase leather care products?



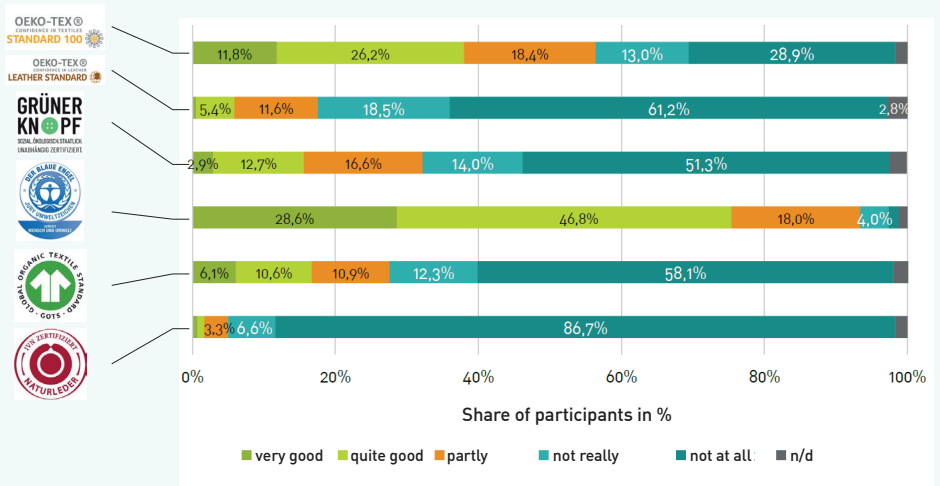
When purchasing leather care products, do you pay attention to chemicals contained?



How well do you know this label?

[n=577]

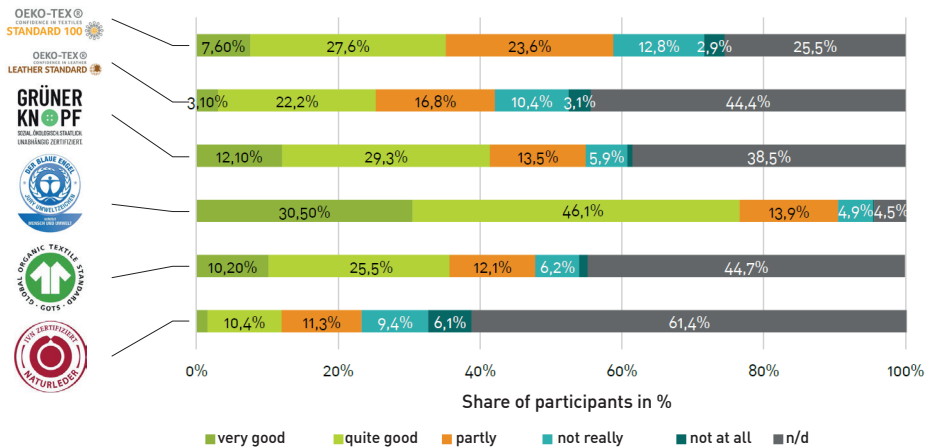
There are considerable differences concerning the public awareness of labels. These results underline that establishing a label is challenging. This holds especially true as the panel can be assumed to be more environmentally concerned than the basic population. However, this is just a snapshot. More research is needed to tell the benefit/impact of labels.



How strongly does this label represent environmental protection?

[n=577]

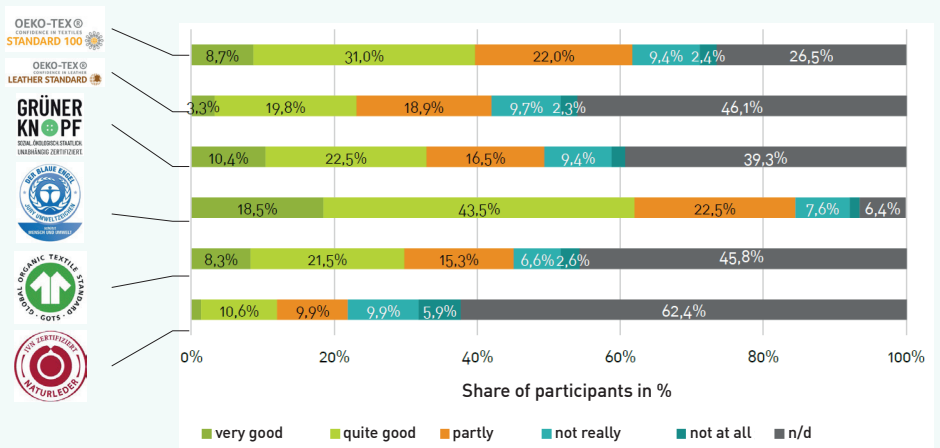
Additional analyses suggest that participants' image of the degree to which these labels represent environmental protection is directly linked to their knowledge of these labels.



How strongly does this label represent protection of consumer health?

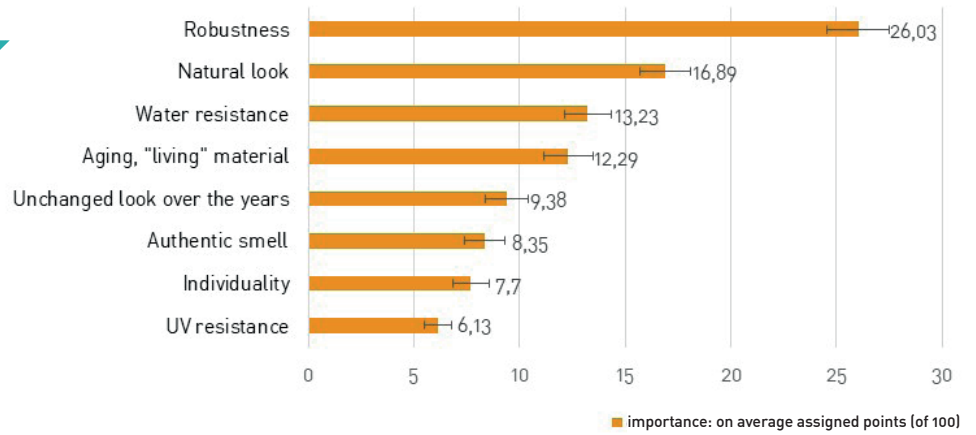
[n=577]

Additional analyses suggest that participants' image of the degree to which these labels represent consumer health protection is directly linked to their knowledge of these labels.

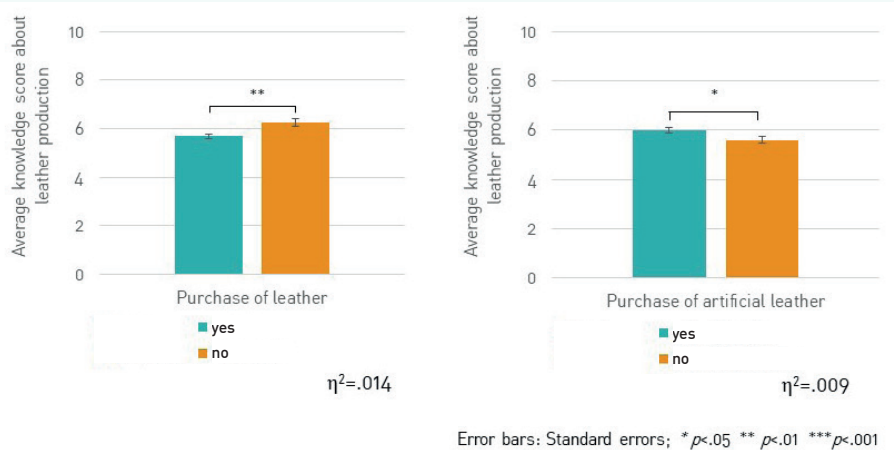


Most important properties of leather goods (n=407)

Participants rated robustness and a natural look as most important properties of leather. UV resistance and unchanged appearance, which are usually achieved by heavy use of chemicals, as well as „authentic smell“ are of less importance.



Connection between knowledge about leather production and leather / leatherette purchase



There is a small tendency that the more participants know about leather, the more likely they are not to buy leather goods and the more likely they are to buy leatherette products.

Knowledge about leather production

Although the majority of participants answer most questions correctly, lack of knowledge concerning the production and properties of leather goods is noticeable.

For instance, most people expect genuine leather to be entirely free of plastic.

Quiz questions	✓	n
The tanning process requires a lot of water.	99,8%	542
Leather is always water repellent.	79,2%	529
Most leather is made from cattle hides.	76,5%	464
There are always chemicals used in the production of leather.	74,9%	499
China produces more leather than India, Italy, Argentina, Portugal, Spain and Germany combined.	75,9%	328
Leather is usually compostable.	71,5%	421
Due to the increasing popularity of vegetarianism, global sales of leather are declining.	61,6%	435
In Germany, a tannery must know which farm the hide comes from.	57,8%	400
More than half of all leather is used for shoe production.	54,3%	383
"Genuine leather" is always without plastics components.	34,9%	464
German manufacturers and retailers of leather goods are legally obliged to know the chemicals contained in the leather.	31,0%	426

■ = statement is true ■ = statement is false

How much would you be willing to pay for leather shoes similar to those pictured here?



Participants not only were willing to pay a significantly higher price for an environmental friendlier and saver production but would pay even more to know the origin of the hides that were used.

Conventional production [n=380]

98,45 €

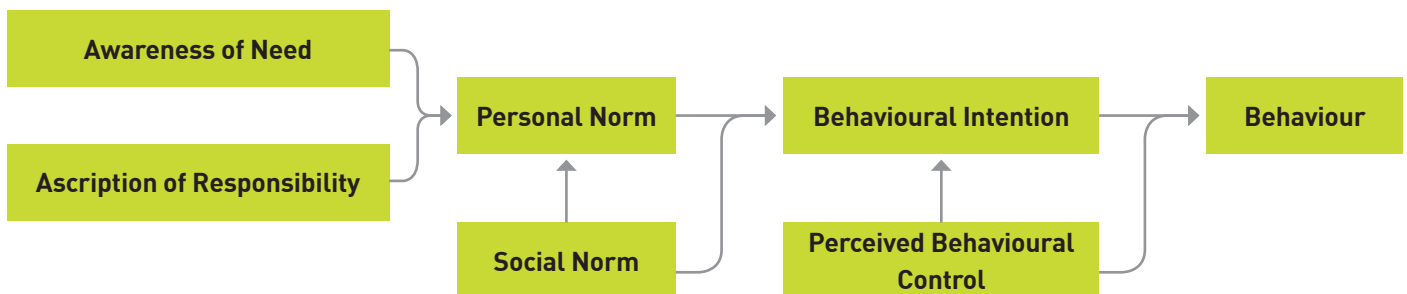
Environmental friendly and save production [n=396]

131,42 €

Environmental friendly and healthy production & hide traceability [n=397]

145,82 €

Theoretical context: Modified Norm Activation Model¹



The results presented above are in line with the theoretical background underlying the survey. According to this theory, behaviour (e.g. buying „more sustainable“ leather goods) is determined by intention (e.g. making plans about buying such products) and perceived behavioural control (e.g. information and offer concerning such products). Behavioural intention again is influenced by personal and social norms. If people are surrounded by others who are more conscious about sustainable consumption, their

personal norms and behavioural intentions might change accordingly. However, personal norms are even stronger influenced by an ascription of responsibility. If a person has the impression of being (partly) responsible for a (critical) situation, this person might change his or her personal norms accordingly.

¹ based on Hunecke, M., Blöbaum, A., Matthies, E., & Höger, R. (2001). Ecological norm orientation and external factors in the domain of travel mode choice behavior. *Environment and Behavior*, 33(6), 830-852.

Key Take-Aways

1 Enhanced traceability could help meeting customer demand regarding animal welfare

Consumers are more and more sensitive to animal welfare. This holds true for leather products as well. The leather industry needs to adapt to this tendency.

Ensuring traceability and communicating to consumers the origin of the hides could thus be one way forward. Offering additional information - e.g. traceability of chemicals - might prove to be a USP for brands and retailers.

2 Traceability does not have to be free of charge

In a digitalised and globalised world, consumers seem to be aware of the costs of information and technical infrastructures. This is noticeable with regards to the price of traceability. While keeping in mind that the sample of this panel does not represent the basic population of Germany or the western world, the average participant would be willing to pay a significant amount of extra money in order to know the origin of the hides that were used. While there is a tendency to offer leather goods in the fast fashion industry for ultra low prices, a considerable share of the consumers seems to acknowledge the natural origin and history of leather goods. Innovative and more sustainable business models could foster these developments.

3 It is OK for leather to be natural

For many consumers the most important properties of genuine leather are its robustness, natural look and water repellency. Many of the rather high-tech features of modern leather require intensive chemical treatments although - according to our data - consumers do not prioritise these properties in leather (e.g. „leather smell“, „UV resistancy“). This is in line with the fact that more than three quarters of the participants buy leather care products. Thus, consumers seem to expect that leather need to be taken care of.

4 Product and information availability is crucial

For more sustainable leather goods to become an attractive purchasing option one might start with consumers' perceived behavioural control. This represents an important requirement of purchasing behaviour but was only slightly pronounced in the sample. In theoretical terms, the survey indicates that „perceived behavioural control“ is the aspect with the lowest mean, underlining that consumers lack choice and information concerning more sustainable leather goods. If consumers shall actively choose a more sustainable leather good instead of conventional leather (or leatherette for that matter), a key factor will be their perception of being actually able to buy more sustainable leather. This means that consumers need to have access to offers that are more sustainable which includes the distribution of these offers as well as the pricing. What sounds trivial and simplistic is in fact a complex issue. As physical and digital stores alike are becoming more and more monopolistic, providing actual market access for niche offers becomes a difficult task. This challenge applies to product prices as well, as higher production volumes and more resources put market leaders in a prior position.

5 Gaining trust by establishing traceability

Another aspect concerning perceived behavioural control is the degree to which consumers have trust in the product, brand or company to actually be „more sustainable“. If consumers have no reliable information and are not convinced that the offer is really more sustainable, their perceived behavioural control will be decreased as they do not see an opportunity to actually purchase according to their sustainability-oriented preferences. Again, factors such as traceability and transparency, but also well designed and distributed labels and independent actors (e.g. research institutes) can support this process. Offers that integrate higher standards of traceability and consumer education might benefit from a raising consumer awareness.

Next steps

The project will take into account the findings from the leather survey: In several subprojects, potential solutions are to be examined to foster „more sustainable leather chemistry“. Together the subprojects address different aspects of the system innovation required in this respect. Any person or organisation wishing to contribute to the achievement of the objectives in the subprojects can participate.

For further information concerning the project „More sustainable chemistry in the leather supply chains“ visit sne.h-da.de/leather-chemistry or contact the coordinator Dr. Julian Schenten directly.



Subproject #1 Harmonisation of standards for a “more sustainable” leather chemistry

Dr. Julian Schenten | julian.schenten@h-da.de

Klick here
to go to
subproject #1



Subproject #2 IT Tools and Governance for Traceability

Dr. Julian Schenten | julian.schenten@h-da.de
Eleni Kaluziak | eleni.kaluziak@h-da.de

Klick here
to go to
subproject #2



Subproject #3 Chemical und Process Innovation

Prof. Dr. Frank Schael | frank.schael@h-da.de

Klick here
to go to
subproject #3



Subproject #4 Leather-Design-Guidelines for Sustainable Development

Dr. Jonas Rehn | jonas.rehn@h-da.de

Klick here
to go to
subproject #4

