

An analysis of buying habits around leather and the need for clarity of information to support sustainable purchasing decisions.



Leather

and the consumer



Research report

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Leather is a sustainable product with unique properties. As a collective of industry bodies, we are proud of the work that we do to promote leather. We rightfully think of it as the ultimate performance material by way of its longevity, resilience and beauty. However, we operate in a fast-changing world, where every aspect of our daily lives is coming under increased scrutiny - the food that we eat, the clothes we choose to wear, how we heat our homes. Consequently, the way we think about leather and how we promote it needs to take account of these changes.

People are being encouraged to make better choices to protect the future of the planet, and we all have a role to play. There is a move towards meaningful, slow consumption, where we 'take, make and re-use' in order to keep natural resources within the economy for as long as possible — known as the circular economy.

Part of our collective role as industry bodies is around education, addressing misinformation and falsehoods. It's important therefore that we maintain a sense of what consumers believe and how they feel about the issues that matter to the leather industry. This survey of 2,000 UK adults sets out to do just that.

Survey of

2,000 UK adults



Introduction



We were keen to understand consumer knowledge around leather and its origins as a by-product. The results surprised us. In a similar vein, as shoppers are increasingly presented with a growing range of leather alternatives, everything from 'mushroom leather' to Pinatex, Desserto or the meaningless catch-all term 'vegan leather', we wanted to find out if they really knew what they were buying. We discovered that many didn't.

The report also investigates the world leather operates in, by exploring emerging purchase behaviours, as well as attitudes to new forms of consumption, such as rental and pre-loved, currently making headlines in fashion, homeware and other industries.

We examine what we will call a new age of thrift, a 'make do and mend' culture and the encouraging signs of a move away from fast, disposable fashion and consumer goods. These trends bode well for a high-quality material like leather, which lasts a lifetime.

Over the following pages of this report, we'll get to know our survey respondents and delve further into these and other insights, which we hope will help inform and eradicate some of the widely-held myths surrounding leather.

We are at a unique point in time when there is huge pressure to change. Consumer attitudes and behaviours are shifting fast and it is vital for our industry to keep abreast of them so that we remain relevant.

Kerry Senior, Director Leather UK

When we polled **2,000 UK adults** about their knowledge of leather and leather alternatives we revealed some good news for the industry, but we also uncovered an alarming level of mis-information. Here are some of the most revealing findings:

Positively for our industry:

Only 15% said they had never owned or bought leather items and just 9% said that they exclusively choose imitation leather.

of those who buy or use leather:

67% of them said it was because leather could be trusted to last a lifetime.

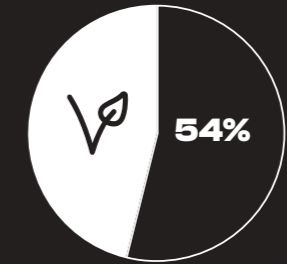
55% said it was because leather is a high-quality material.

Worryingly:

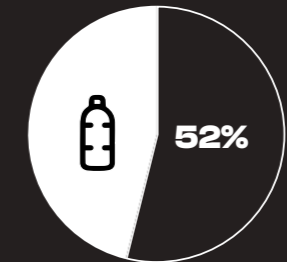
Only 24% of our respondents were aware that hides or skins used to make leather are a by-product of the food industry that would otherwise go to waste.

Of even more concern:

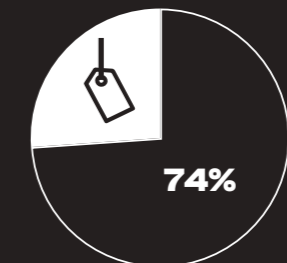
50% said they thought it derives from animals which are raised specifically to make leather



When it comes to so-called 'vegan leather' there was an alarming level of confusion - over half (54%) of respondents had no idea of the composition of this material.

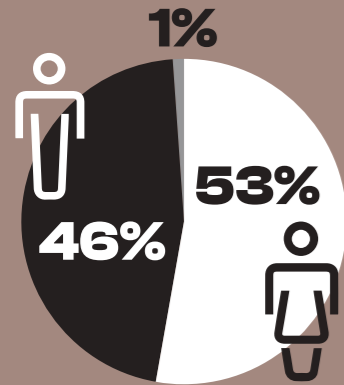


When told that an item labelled as 'vegan leather' could potentially be 100% PVC or PU rather than made from "all natural" materials, 52% of respondents expressed disappointment.



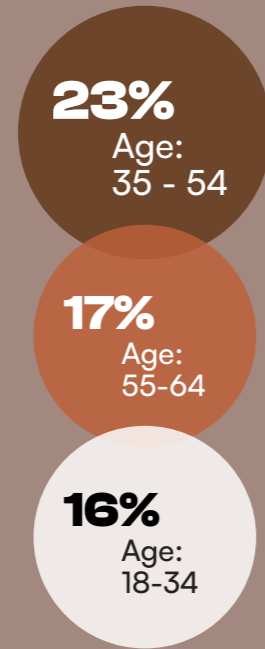
In this regard, 74% agreed that 'it should be easy to see what I am buying and that labelling should not be misleading'.

Our survey of 2,000 UK adults was conducted during November 2021. Slightly more women (53%) were surveyed than men (46%), with the remaining 1% preferring a non-binary gender definition.



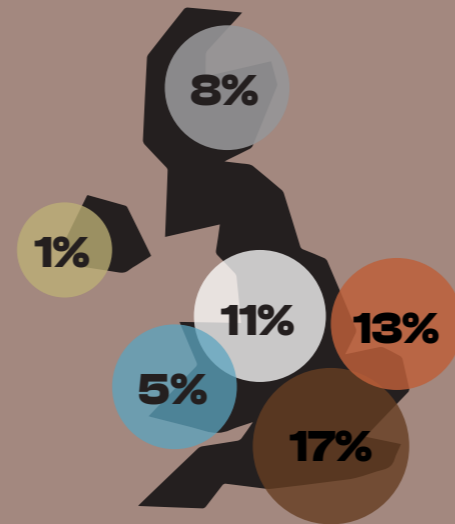
GENDER

A majority of respondents (23%) were aged between 35 and 54 years old, giving us a fairly equal representation of both Millennials and Generation X. The 18–34-year-olds made-up 16% of respondents, while Baby Boomers (55–64 years old) accounted for 17% of respondents.



AGE RANGE

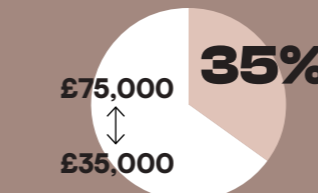
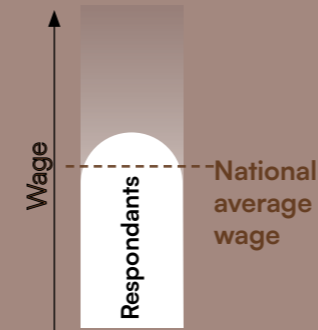
Our survey pool was weighted slightly more towards London-based opinion formers (17%). Across other UK regions, we achieved a well-balanced representative spread, including views from Scotland (8%), Wales (5%), and Northern Ireland (1%). Outside of London, the South East of England made up 13% of respondents, with the north west making up 11%.



UK REGIONS

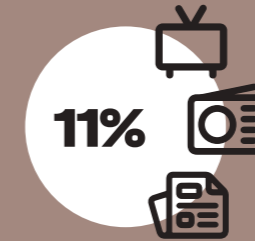
- London
- East of England
- North West England
- Scotland
- Wales
- Northern Ireland

Respondents earned slightly above the average wage in the main, with 35% taking home between £35,000 and £75,000 and half in full-time employment.



INCOME

Interestingly, 11% told us that opinions read in more traditional forms of media such as TV, radio and newspapers mattered to them, whereas only 8% said the same about celebrities and social media influencers.



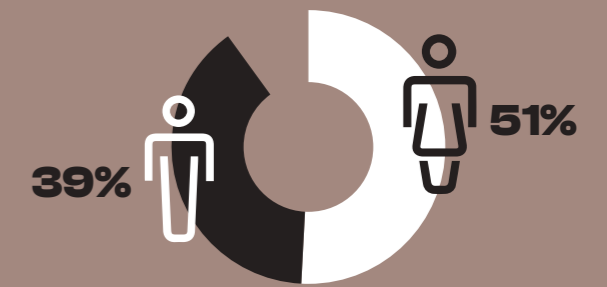
OPINIONS THAT MATTER

When it came to forming opinions on what to buy, wear or eat, almost half (46%) told us they make up their own minds, without paying attention to anyone else, while 37% relied on recommendations from family and 23% valued advice from friends.



FORMING OPINIONS

Women were more likely to say that they made-up their own mind - 51% of females told us this compared with 39% of men who said the same.



GENDER SPLIT

The opinion formers



Attitudes to leather

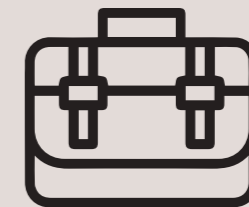
With an understanding of who our survey respondents are and what informs their decision-making, we wanted to dig deep into their attitudes and opinions towards leather and leather alternatives.

Leather apparel, accessories, interiors and lifestyle products remain hugely popular and leather remains an evergreen on the designer runway shows as a covetable, luxury material. But the industry has experienced negative headlines and has unfairly found itself a target of campaign groups, often with anti-leather agendas.

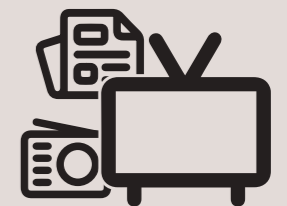
We asked respondents therefore, whether or not they bought or used leather items and discovered that over half (54%) said that they did. We believe the figure may in fact be higher as many people will be wearing leather shoes or trainers that include leather elements or putting on a leather belt with their favourite jeans and may overlook this.

Nearly a quarter were split between never having owned or bought leather items (15%) and only buying imitation leather (9%).

Some 20% did tell us they 'no longer' buy or use leather items but we cannot assume this has been influenced by negative headlines since only 11% claimed to be swayed by newspapers, radio and TV. Other factors such as expense, fashion trends and personal taste will no doubt have contributed to their decision.



At least
54%
have purchased or used new or second hand leather

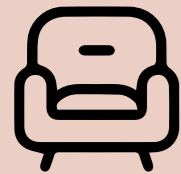


11%
claimed to be swayed by newspapers, radio and TV

Of the 1,074 people who told us they do still buy and use items made from real leather, 67% said it was because leather could be trusted to last a lifetime and 55% said it was because leather is a high-quality material. Our consumers' continued willingness to buy leather goods shows that media headlines that lead us to believe leather is rapidly falling out of favour should be taken with a pinch of salt and that leather is very much on the agenda as a buying choice for many people.

Some 53% cited leather's comfort and practicality as a main reason to purchase, while 37% saw it as easy to maintain and clean. 16% said they choose real leather because it has less environmental impact than imitation leathers such as PVC, while 13% see real leather as a status symbol.

Around 47% of all the world's leather is transformed into shoes, which is around three billion pairs of leather shoes per year (source: Leather UK). So it was no surprise that when we asked our respondents to name the leather item they had bought most recently, 31% said shoes or boots.



53%

cited leather's comfort and practicality as a main reason to purchase



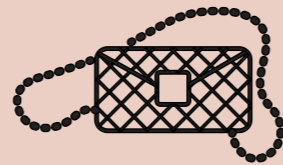
37%

saw it as easy to maintain and clean



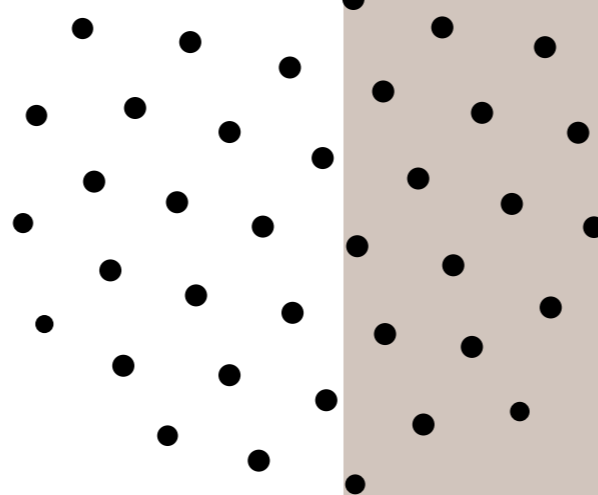
16%

because it has less environmental impact than imitation leathers such as PVC



13%

see real leather as a status symbol



16%

Said their last leather purchase was a belt



3%

of our respondents had recently replaced their vehicle with one boasting leather seats



24%

told us they most strongly associate the black leather biker jacket with leather

Some 16% said their last leather purchase was a belt. Higher price items such as jackets (10%), bags (10%) and furniture (7%) then followed. Leather trousers remain a popular womenswear choice, with 2% of our female respondents having bought a pair most recently.

Some 3% of our respondents had recently replaced their vehicle with one boasting leather seats, while 5% of respondents were preparing for the British winter by buying a pair of leather gloves.

Interestingly, it's the black leather biker jacket that people most strongly associate with leather, as evidenced by 24% of our respondents. Between its early 20th century conception and its modern-day popularity, the biker jacket has been adapted many times, but there is still something undeniably classic about its design.

In 2021 though, according to our respondents, leather is considered more a 'luxury' and 'heritage' item, rather than 'cool' or 'inspirational'. Its use in the automotive industry and its associations with luxury travel and five-star fittings and furnishing in plush hotels have evolved its narrative for a modern-day audience, carrying with it positive connotations of quality, longevity and sustainability.



With almost half of our respondents happy to buy leather clothing, accessories and other items, we were intrigued to know how much they (together with those who didn't buy or wear leather) knew about leather's provenance and products labelled as alternatives to leather.

But before we look at the results, it's important to acknowledge the rise of so called 'vegan leathers', a term that we feel deeply uncomfortable using because it is almost meaningless.

According to Lyst stats cited in an article in Vogue Business, searches for "vegan leather" have increased by 69% year-on-year, which means it's not something we can ignore.

And it's not just the fashion industry. The automotive industry (regularly targeted by anti-leather pressure groups) is increasingly seeing a move to leather alternatives. Tesla has opted to impose leather-free interiors on its buyers, but Rolls Royce's CEO states that although 'vegan leather' forms part of its options list, no-one has ever asked for it as an alternative to the luxury feel of real leather.

But as it moves up the agenda, there needs to be transparency around the term 'vegan leather' — what does it actually mean? Things get even more confusing for the consumer when you add in the term 'plant-based' leather. Clearly, neither is an animal-based product, but vegan is not necessarily plant-based. So, what is vegan leather actually made of?

To make things worse, in a few cases seen here in the UK, items marketed as 'vegan leather' don't even carry

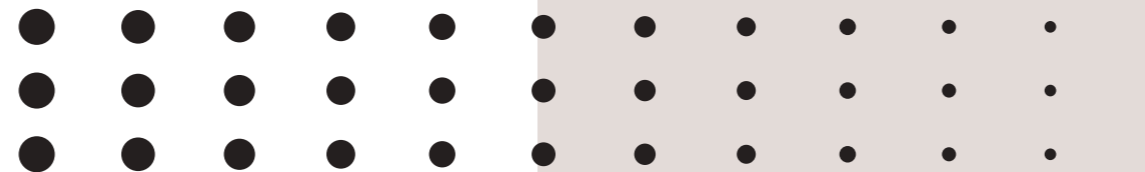
labels with details of the exact material composition, meaning that shoppers are left in the dark as to what they're really buying.

Unfortunately, in the UK today, any sort of material that is designed to look like leather, but is not made of animal hides, can be labelled 'vegan leather'. There is no UK legislation governing the term and how it is used.

So, a consumer might find themselves buying 'vegan leather' that is a pure petrochemical derived synthetic such as PU, PVC or vinyl, or it could be any number of the newer plant/plastic textiles such as apple, pineapple or cactus. It could even be 'mushroom leather' a mushroom textile created using mycelium fibres.

There is no UK legislation governing the term 'Vegan Leather' and how it is used.

What do you know about leather and leather alternatives?



Given this backdrop, it's understandable therefore that 50% of our more climate-aware respondents find it increasingly difficult and confusing to know what the right choice is when it comes to shopping in a way that has the least impact on the planet.

That said, we were still shocked by just how much mis-information, falsehoods and marketing tactics that promote 'vegan' alternatives have contributed to blurring consumer knowledge around real leather.

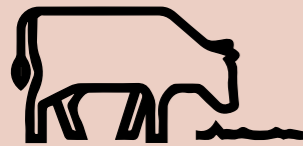
For example, when we asked respondents where they believe leather comes from, 50% said they thought it derives from animals, which are raised specifically to make leather and 13% confessed that they didn't know.

Only 24% of our respondents selected the following true fact about real leather's provenance:

The hides or skins used to make leather are a by-product



of the food industry that would otherwise go to waste



50%

said they thought it derives from animals, which are raised specifically to make leather



13%

confessed that they didn't know



Younger respondents aged between 18 to 34



14%

correctly identify hides and skins as a by-product



8%

identified leather as being grown in a laboratory



30%

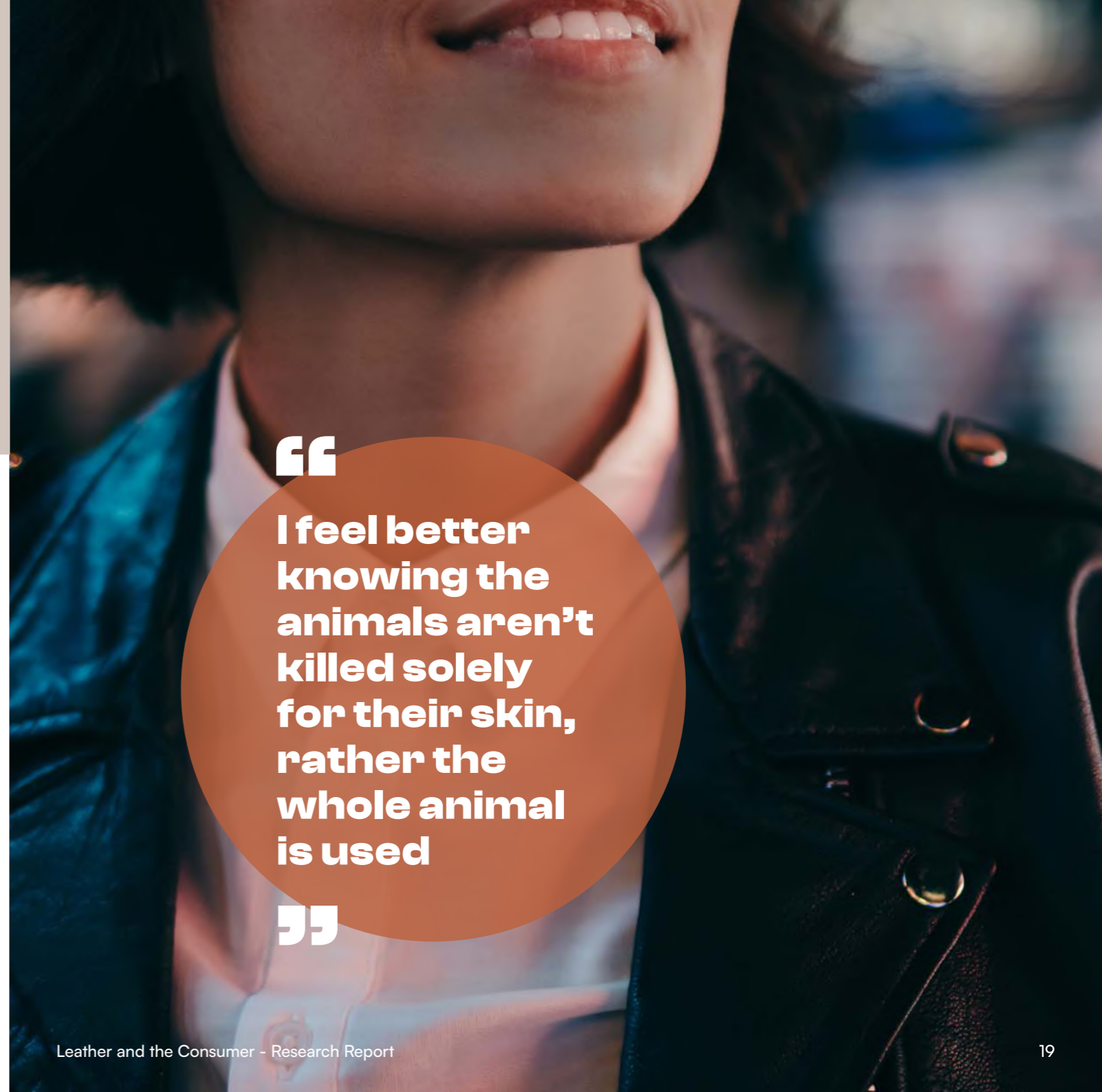
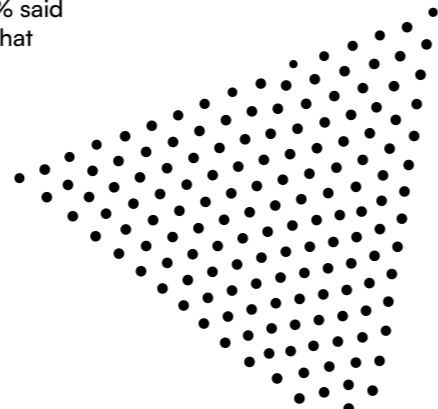
cited 'not wanting anything to go to waste' as their main reason for buying leather

Younger respondents aged between 18 to 34 were least likely to correctly identify the by-product statement as fact — only 14% compared to 30% of those aged 55 upwards. Strangely though, older respondents were more likely to state, wrongly, that leather comes from animals (such as cows) which are raised specifically to make leather than younger ones — 59% of 55-to 64-year-olds and 62% of those over 65, versus just 35% of the 18- to 34-year-old cohort. However more of the younger group identified leather as being grown in a laboratory, 8% vs an average of 3% or that it is derived from naturally occurring substances such as cotton, flax, 17% vs an average of 6%.

When we dig further into misinformation, we see there are many agenda organisations, which try to argue that the leather industry drives animal rearing, but this simply isn't true. Hides and skins are definitively and absolutely by-products. Meat production generates about 11.6 million tonnes per year of hides and skins. If these were not used to make leather, they would simply be thrown away.

At a global level, a hide is currently worth on average between 1 to 2 % of the value of the whole animal when slaughtered. Clearly, no-one is rearing cattle for such a tiny percentage of the value of the animal.

When leather's status as a by-product was clarified to our respondents in a subsequent question, 30% cited 'not wanting anything to go to waste' as their main reason for buying leather. 8% of people who told us they don't currently buy or use leather said they would be more likely to buy leather in the future after learning about its origins as a by-product and this rose to 19% among 18-to 34-year-olds. A small group, 9%, who don't buy leather said nothing would make them change their minds, while 10% said they might consider it in the future, now that they knew the real facts.



“

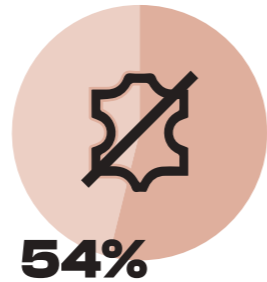
I feel better knowing the animals aren't killed solely for their skin, rather the whole animal is used

”

And there is more to be said on the subject of 'vegan leather'. Calling an alternative leather 'vegan' is a favoured brand strategy that implies the product is a cleaner and a more environmentally responsible consumer choice. We've already identified confusion around the use of the term, but what did we learn on this issue from our respondents?

When we asked them if they knew what 'vegan leathers' are made from, over half (54%) had no idea; 8% felt their definitely knew, and only 5% thought they knew. A shocking 24% said they hadn't really thought about it. We then went on to ask them to identify whether a range of imitation leather

materials as well as natural materials such as silk, wool and flax, were animal, plant or synthetic in origin. 47% couldn't allocate polyurethane to the correct category; 21% didn't know the provenance of PVC; 53% had no idea what materials made up pineapple leather (it's a mix of plant and plastic); unsurprisingly 50% couldn't tell us what went into mushroom leather; and 40% didn't know what leatherette was. 23% thought silk was plant based and 13% said they didn't know the origins of wool!



54%

had no idea what 'vegan leathers' are made from. A shocking 24% said they hadn't really thought about it

47%
couldn't allocate polyurethane to the correct category



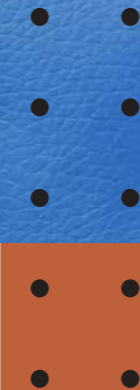
53%
had no idea what materials made up pineapple leather

21%
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23%
thought silk was plant based

WE ASKED:
Are these imitation leather materials; animal, plant or synthetic in origin?



To further explore this lack of knowledge, we set our respondents a challenge, asking them which of the above materials they thought did the most and least harm to the planet.

Almost half, 47% of respondents, didn't know which material caused the most harm, while 22% opted for PVC. Polyester came third with 15% of the vote and nylon and vinyl shared fourth spot with 12%.

Some 39% didn't know which material caused the least harm to the planet, while 23% opted for wool. Cotton received 22% of the vote and silk was next with 12%.

From our perspective as custodians of the leather industry, 11% thought leather to be the least harmful material, which does suggest that people associate more nature-based and natural products with doing less harm.

However, 9% or 190 respondents believed that leather is more harmful to the planet than PVC, PU, or the other synthetic choices, so we too must look at the reach of our educational resources and communication to correct this misinformation.

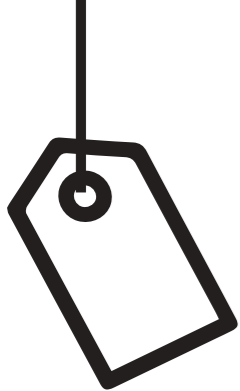
By way of education, we proceeded to explain to our respondents that the term 'vegan leather' could be applied to a wide range of materials, including those derived from petrochemicals such as PU, PVC and vinyl. We then asked them how they would feel if an item they'd assumed was natural when they'd bought it, turned out to be synthetic. The reaction was overwhelmingly negative; a quarter (25%) told us they'd feel ripped off that they'd bought something that wasn't what they thought it was or what the description implied it to be. A further 14% said they would be very upset and 13% said they would want their money back if they'd bought something they thought was all natural, turned out not to be.

Once we'd established how strongly people felt about knowing what it is they are buying, we asked about the importance of clear labelling. 74% agreed that 'it should be easy to see what I am buying and that labelling should not be misleading'. Only 5% said they never checked labels and 6% said they didn't have a strong view.



25%

told us they'd feel ripped off that they'd bought something that wasn't what they thought it was or what the description implied it to be



Advocating for clarity when it comes to labelling does not mean that alternatives to real leather shouldn't be available. We believe in freedom of choice and understand that some consumers will want to have the option of accessing a broad range of alternatives. Yet, we repeat our call for transparency and a move away from meaningless, marketing-led terms which obfuscate the true nature of the material in question.

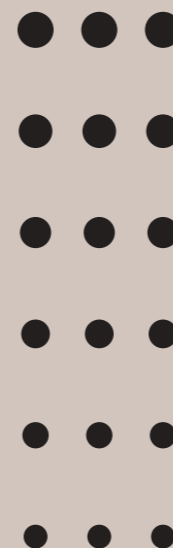
Moreover, as an industry we do feel that the word leather is one that should be reserved solely for the original animal-derived product and that alternatives available on the market should find other terms to describe themselves.

Leather is as old as humankind, and it cannot be divorced from its animal origins. In Italy and Portugal, legislation has been passed that makes it illegal to label anything as leather that is not the original animal product. The same is true in Brazil. We are working for that to be the case in the UK but, for the time being, we have to accept that the laws governing labelling are not yet ready to change.

Until such time, it is paramount that we ascertain consumer knowledge around so-called 'vegan' alternatives, learn more about consumer experiences and continue to educate.



'we do feel that the word leather is one that should be reserved solely for the original animal-derived product'



When we asked our respondents to select from identically priced and styled items made from seven different kinds of 'alternative leather' known by terms including faux leather, PVC, PU, vinyl, leatherette, 'vegan leather' and 'plant-based leather', as well as real leather.



36%

opted for real leather, which was more than for any other option.



Some 32% however couldn't make up their minds, which again highlights the confusion people feel when faced with a choice over something they don't know enough about.

As part of our study, once respondents had gone through the survey sections designed to educate them about leather's status as a by-product, the composition of alternative leather materials and we'd debunked some of the abiding myths about leather, we posed exactly the same question again, asking them to choose between a leather or alternative leather version of the same item.

This time, 42% opted for real leather and fewer people opted for faux leather (7% versus 11% previously) and 'vegan leather' (4% versus 6% previously). The same number of people still couldn't make up their minds but it does go to show that, by providing people with the facts, it allows them to make better, more informed decisions. This was the case in our survey even when people had very little time to digest the facts we'd provided.



Although a majority of our respondents (59%) said they'd never specifically chosen to buy or wear an imitation leather item, of those that had, 17% cited price and 11% cited 'being against using animal products' as influencing their purchasing decision.

However, of our respondents who told us they hadn't enjoyed wearing alternatives to leather, 52% said it looked and felt cheap and 48% told us the item didn't last long.

Interestingly the latter has also been the experience of Tesla drivers, with many reporting quality issues with their 'faux leather' upholstery 'bubbling'.

59%
said they'd never specifically chosen to buy or wear an imitation leather item.

of those that had
→

17%
cited price
&
11%
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And when it comes to car ownership, some 38% of respondents told us that when buying a new car, they wanted to choose for themselves whether or not to go with leather over fabric seats or a 'vegan' substitute.



This desire to be able to choose for oneself is at odds with the actions of a growing number of car manufacturers who are moving to only offering 'vegan leather' seats. They say they are responding to market demands, but our research findings show that a significant number of consumers value freedom of choice in this matter. As industry bodies we also worry that the automotive industry, a significant user of leather, is the canary down the mine. Where the consumer's ability to choose is removed here, other industries may be tempted to follow, leading to regrettable choices, such as petrochemical based alternatives, that negatively impact the move towards a circular economy. This is why it was so important for us to ask our respondents their feelings on this issue.

Having examined consumer attitudes to leather and shone a light on a surprising lack of knowledge around leather's by-product status, we wanted to explore the broader context within which consumers live their lives and make their purchasing decisions. This is important for us, because these new attitudes and behaviors directly impact how we promote leather and how it fits into this rapidly changing world.

Concepts like sustainability, provenance and buying local are becoming more familiar and most people acknowledges that we all have to change our consumption habits if we are to tackle climate change. Yet to a large extent we still live in a take, make, waste economy. We've grown accustomed to replacing things that get broken or damaged, rather than fixing them or choosing items that are made to last.



Evolving consumer behaviours

However, fast fashion's culture of mindless consumption has, for a while now, been giving way to 'slow fashion' - an investment in quality and meaningful consideration, together with the prioritisation of 'timeless' over 'trend-driven' in support of a society where we 'take, make and re-use' in order to keep natural resources within the economy for as long as possible. This is known as the circular economy.

A quick scroll through TikTok and you'll find countless posts advocating slow fashion and the circular economy, including Levi's' [#ThenNowForever](#) campaign, where creators have been posting vintage images of their inspiration - be it a parent or idol - wearing Levi's jeans and then a modern-day recreation of the photo in the same style.

Younger shoppers are undoubtedly driving this societal change, evidenced by social media activity and a surge in sales of pre-loved clothing, as they seek alternatives to fast fashion.

On eBay, sales of pre-loved fashion have shot up in the UK over the past year, with the company selling almost [87 million secondhand items](#). Fashion-conscious Gen Zers meanwhile have been trading previously-owned apparel on websites such as [Depop](#) and [Vinted](#) for several years now.

High-street retail brands, such as M&S and Asda have been keen to support the pre-loved trend as part of their journey towards net zero corporate sustainability targets. According to [M&S's Family Matters Index Report](#), over a third of consumers now consider the climate crisis when making clothing purchasing decisions.

Asda announced in May 2021, that it was introducing secondhand clothing to 50 UK supermarkets. In November 2021, M&S launched a clothing rental venture, made up of over 40 womenswear pieces from its Autograph range, with a focus on premium fabrics such as leather and silk.

Back in 2015, researchers estimated that the wider circular economy was a [\\$4.5 trillion opportunity](#). Last November, it was estimated that [fashion alone was a \\$5 trillion circular economy opportunity](#) — a sign of just what an impact a change in consumer mindsets has had on the 'take, make and re-use' model.

With both industry and shoppers embracing the importance of reusable fashion that's created to last, we wanted to know from

our survey respondents, how their retail behaviours have changed.

“**slow fashion' - an investment in quality and meaningful consideration**”



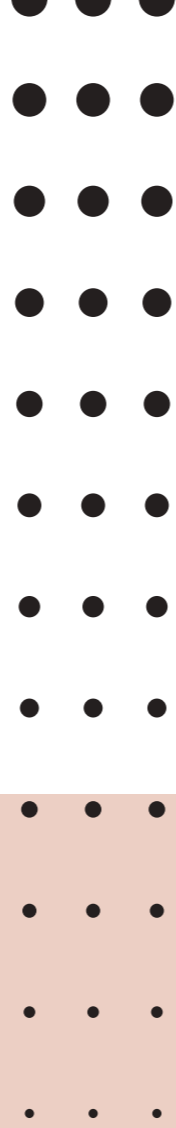
Reassuringly, 35% told us they buy clothing, shoes and accessories less frequently than they did five years ago, with only 14% saying they shop for these items more frequently now.

Women were the most likely to say that they had been buying clothes less frequently (42% versus 26% of males saying the same).

Of those who say they've curtailed their fast fashion buying habits, 49% stated that they're now consciously trying to make items last longer than they would have done previously.

This compares with 36% who claimed that they're now more conscious of the environmental impact than five years ago.

Regrettably, just under half (48%) of respondents reported no change to their buying habits, proving that although the sands have certainly started to shift in the direction of slow fashion and the circular fashion economy, there's still a considerable way to go.



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of which →



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A leather coat or jacket ranked second as their oldest piece of clothing



45%

of respondents confessed that they'd kept hold of an item for so long because it could be relied upon to still look and feel great



63%

of respondents agreed that it's important to have clothing that lasts for years

Interested in what's behind the wardrobe doors of our respondents, we asked them to rank the oldest items of clothing that they possess and still wear.

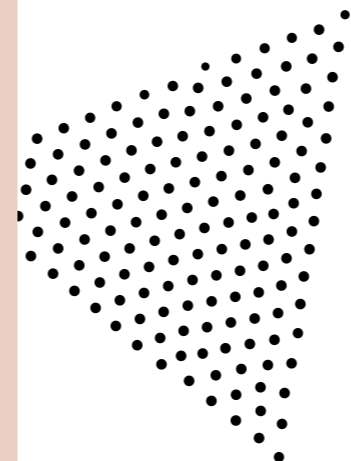
Perhaps unsurprisingly, a pair of denim jeans came out on top, with 13% saying it was their oldest clothing piece. A leather coat or jacket ranked second, with 9% of respondents answering they've kept hold of one for the longest time.

When we asked how old their longest lasting item of clothing was, the highest proportion (30%) told us it was between six and 10 years old. Some 20% said 11-15 years old and another 20% said they currently owned items that were more than 20 years old.

Some 45% of respondents confessed that they'd kept hold of an item for so long because, it could be relied upon to still look and feel great to wear as it was made from materials with a long life-span. 57% said it was because they still really liked the item and enjoyed wearing it.

On the whole, 63% of respondents agreed that it's important to have clothing that lasts for years, even when worn regularly in a further sign of consumer mindsets shifting away from fast fashion.

As mentioned previously, there's still a considerable way to go though, as over a quarter of our respondents admitted they'd never considered the issue of longevity when it came to their wardrobe choices and around one person in every ten confessed to wanting their wardrobe updated regularly.





Where they buy

With the global pandemic shutting down brick-and-mortar stores and an economic downturn reducing many people's disposable income, 2020 was a tough year for many business sectors. As we look towards 2022, we find ourselves facing the prospect of more of the same.

A December 2020 report by [McKinsey & Co](#) predicted that profits in the fashion industry would fall by 93% that year.

One category of clothing retail has successfully bucked this downturn however. Digital re-sale sites such as Depop and Vinted have flourished.

Today, [Depop has 30 million active users](#) across 150 countries and 90% are under the age of 26. The European start-up, Vinted meanwhile is valued at [\\$4.5 billion](#) and boasts 45 million users who upload clothing items to sell or who buy those uploaded by others.

According to research conducted by GlobalData and ThredUp, the pre-loved apparel sector is currently growing [11 times faster than traditional retail](#). Shares of online resale market Poshmark more than doubled after its IPO in January 2021, and ThredUp's stock shot up 30% when it went public in March.

But has the pre-loved trend only found cut-through amongst the young? Or have Millennials, Generation X or even Baby Boomers also found their way onto resale sites and into high-street charity shops?

We asked our survey respondents if they were 'More or less likely now than two years ago to buy clothing from a resale platform, vintage store or secondhand store' and 22% said they were 'more likely', with only 6% saying 'less likely'.

That still leaves 72% however, with a quarter admitting they'd never considered it, while 47% confessed to no change.

Still, that 47% may have already been using pre-loved sites and vintage stores before the pandemic, although this is more likely to be the case among the young early-adopters of Depop and the like.

Clothes rental moreover, is an area that has been slower to take-off in the UK, compared with the US, where it has been popular for a while.

A study by Westfield shopping centre found that the UK clothing rental market has a potential value of [£923 million](#) and is finally forecast to boom over the next few years.

With 35% of our respondents saying they buy clothing, shoes and accessories less frequently than they did five years ago, it's little wonder that retailers such as the aforementioned M&S and even Harrods are dipping their toes in the rental waters, competing as ever with a host of new-breed digital start-ups.

Apps such as [By Rotation](#), for example, has seen a staggering 600% increase in rentals this year. Similarly, [Rotaro](#), [HURR](#), [HireStreet](#), [Onloan](#) and [MyWardrobeHQ](#) (which made headlines when the Prime Minister's then fiancée, Carrie Symonds [rented her wedding dress](#)), have all had a record-breaking 2021 as the rental trend starts to take-off.

It's still early days for the rental category though as evidenced by 78% of our respondents who said they've never rented every-day use or special occasion attire.

Some 334 respondents (17%) told us they had rented clothes that were not fancy dress or wedding related however, and it will be fascinating to see this number rise as the trend continues to accelerate. Interestingly, of these 334 respondents, 32% stated their reason for renting was driven by the desire to make more ethical and sustainable choices, while 31% said it allowed them to experience luxury items they wouldn't otherwise have been able to afford.

To conclude this line of questioning, we asked our respondents to choose from being able to buy new, renting, buying pre-loved or borrowing from a friend, should a big occasion arise that required a special outfit.

The whole retail experience of buying for a special occasion is clearly still important to people as

36% said they'd opt to buy new with only 10% opting for rental. The second most popular answer however was to buy pre-loved, vintage or secondhand - an activity that still provides the experiential high of shopping with friends but is the more sustainable retail choice.



32%
stated their reason for renting was driven by the desire to make more ethical and sustainable choices



22%
said they were 'more likely' now than two years ago to buy clothing from a resale platform



Attitudes towards repairing, restoring and mending

The Repair Shop is one of the BBC's most adored TV shows. The programme, hosted by Jay Blades, attracts millions of weekly viewers, keen to see old possessions restored and repaired into their original glory.

It is just one of a plethora of en vogue television programmes themed around repairing and restoring. Others include Escape to the Chateau: Make Do and Mend, Saved and Remade and Money for Nothing.

But has our love for restoration TV translated into our everyday lives? Are we more likely to think twice about throwing something away when we know there's talented craftspeople out there who are able to repair our possessions? And have we been inspired by our viewing habits to take a different view of disposable fashion?



42%

said they'd try to repair an item of clothing themselves



45%

said they'd find a shoe repair service



24%

said that it wouldn't occur to them to alter or adjust an ill-fitting garment

We wanted to find out, so asked our survey respondents what they would do if an item of clothing needed simple mending or alteration?

Some 42% said they'd try to repair it themselves. So, we went one step further and asked what they'd do if footwear such as shoes or boots needed repairing? A majority (45%) said they'd find a shoe repair service, although only 11% would be brave enough to have a go at fixing footwear themselves.

To identify deeper insights into respondents' attitudes towards making do and mending, we asked if they would alter or adjust an item of clothing that no longer fitted or needed updating. We were impressed to discover that 28% said yes and they'd most likely do it themselves.

OK, so 24% said that it wouldn't occur to them to alter or adjust an ill-fitting garment or one that needed updating, but maybe they haven't been watching the same television shows as the rest of us?



Sustainable behaviours

In this report we have identified a range of fascinating societal trends, drilling down to see what people think and how they behave across issues that really matter to our industry. In this our final chapter, we step back in an effort to recap the bigger picture when it comes to consumption.

Whilst we established earlier that almost half (46%) of our respondents are confident enough to make up their own minds on what to buy, wear or eat, we were keen to discover how this decision-process worked.

First, we established that a majority (47%) are climate aware and regularly consider the impact on the planet when choosing what foods to eat and the clothes they wear.

This is evidenced by our respondents' retail behaviours detailed in the previous chapters, alongside trends such as pre-loved shopping platforms, clothing rentals and the popularity of restore and repair shows on TV.

But when we pushed those with the best intentions to tell us how that consideration translates into decision-making, we discovered that 50% find it confusing and hard to know what the right choice is when it comes to shopping in a way that has the least impact on the planet.

The will exists, as 28% of respondents who said they regularly consider the impact on the planet when choosing what foods to eat and clothes to wear, also told us they go out of their way to research items and read labels.

Men who thought about their impact on the planet were more likely to read the label carefully and do a lot more research to help them buy the products that did the least harm — 32% of males mentioned this versus 25% of females who said the same.

By age, the 18—34-year-olds were the most likely segment to read labels carefully and do their research to ensure the least environmental impact — 39% of the 18—34-year-olds mentioned this versus, for example, 18% of the over 65s.

And by earnings, the highest earning income group were also the most likely to say they thought about their impact on the planet when buying food and clothes — 69% of those earning £100,000 or more a year said this, versus 40% of people who earn between £15,000 and £34,000 a year.

Those sustainable brands and retailers who provide clear, concise messaging and communicate more often with shoppers on climate impact reduction strategies are more trusted by 46% of respondents.

Of those who said they didn't consider the impact on the planet when choosing what foods to eat and the clothes they wear, 19% said it was because they were happy to trust the brands they buy and shop with to do the right thing. But a significant number, 48%, said they buy the items they consider best value for money and 49% they buy the items that most suit their needs and preferences.

There's clearly a communications issue here with shoppers either being confused, having to research deeper or just leaving it up to individual businesses to do the right thing due to a lack of information and a sense that it's just too difficult.

This is a fitting way to conclude our findings. In this report we have highlighted key issues around misinformation and falsehoods that have been spread about our industry. But it goes much further than our industry as we have shown. There is an urgent need for consumers to be presented with clear, digestible facts and better labelling if they are to play their part by making the right choices for the future of our planet.



47%

are climate aware and regularly consider the impact on the planet



46%

trusted brands who provide clear messaging and communicate more often with shoppers on climate impact reduction



18-34 year-olds

were the most likely to read labels carefully and do their research

If we have one rallying cry as an industry it is for clarity around leather's status as a by-product. A significant number of our survey respondents were not aware of this. Organisations with an animal welfare agenda harness this lack of knowledge to drive anti-leather sentiment and to encourage the purchase of alternative materials that in some cases cause harm, because they are derived from fossil fuels.

There are great strides being made to reduce leather's carbon footprint, with a range of exciting initiative across the industry. In the UK we are seeing the development of a traceable supply chain to produce leather entirely from British livestock that is reared according to the principles of regenerative farming. Technology and innovation are also playing a role in the quest to place sustainable practices at the heart of the industry as it moves towards circular manufacturing. Water from leather treatment is increasingly being re-used within production and energy is generated from by-products that power manufacturing facilities and result in a radical reduction of waste to landfill.

We know that our industry has to work harder to communicate these exciting developments and to explain that leather can be a responsible, sustainable choice. Leather, along with other natural materials such as wool and silk, has been in the firing line, unfairly we feel. Consumers are being told to choose alternatives, for reasons of animal welfare and to protect the environment.



Conclusion

'Vegan leather' is increasingly being used as a marketing term to reassure shoppers they are 'doing the right thing'

The two get conflated as part of the argument against the use of natural, animal-based materials. Yet, many of the alternatives to leather are synthetic materials, which can cause considerable environmental harm.

Our survey respondents' confusion around leather's provenance and the nature of the range of available leather alternatives was striking, especially the use of the term, 'vegan leather' with its true make-up too often a mystery to the consumer. It is increasingly being used as a marketing term to reassure shoppers they are 'doing the right thing'. We would like to see the term disappear from use in favour of the exact composition of the material being detailed.

This is in line with our respondents call for clearer labelling and better advice to allow them make a more informed choice. And choice is the all-important word here.

We understand that some people will never choose leather and we don't believe in imposing a particular view of our industry on anyone. But we do believe people have a right to be in possession of real facts that can result in more informed decision-making about the products they choose to invest in.

Leather UK

Leather UK is the trade association for the UK leather industry. We are a membership-based organisation with the remit to represent, promote and protect the UK leather industry.

leatheruk.org



The Institute for Creative Leather Technologies (ICLT) is a unique research and education centre. Our research responds to the scientific and technological needs of the automotive, fashion, footwear and allied leather industries.

northampton.ac.uk



Leather naturally is a not-for-profit industry members association that focuses on education and the promotion of leather.

leathernaturally.org