Key consumer demands that will shape 2021: what the fashion and home textile industry should expect

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As we approach 2021 and continue to tackle the impacts of the COVID-19 pandemic, the long road to recovery reveals discoveries about new consumer preferences in clothing and home purchase decisions. Throughout this period, more consumers have been educating themselves on sustainability and prioritizing brands deemed trustworthy. Gone is the wasteful consumption and throw-away culture – conscious consumers instead hold higher ethical expectations and are challenging fashion and home textile brands' short-term mindsets when manufacturing products.

To develop a holistic perspective on consumer demands in 2021, Austrian-based eco-fiber producer, Lenzing, interviewed 9,000 respondents across the world between the ages of 18-64 to identify critical knowledge that will maximize business potential and consumer confidence. The "Global Consumer Perception Survey on Sustainability in Apparel and Home Textiles" showed an underlying conclusion that brands need to turn away from producing disposable textile pieces, and instead, strive for longevity and durability.

Lenzing
Innovative by nature

Tencel™
Feels so right

Global Consumer Perception Survey on Sustainability in Apparel and Home Textiles

Demographics

Conscious Consumers with the following characteristics:

- **9,000** respondents (1,000 per country)
- Aged 18-64
- Purchase clothing and home textile products
- Image-conscious
- Value eco-friendly products
- Act ethically, produce sustainably and give back
- Interested in eco-friendly practices

Key Findings

Perception of Sustainability

- **80+%** are "extremely/very interested" in sustainable fashion
- **86%** think sustainable raw materials = more sustainable lifestyle

The textile product's "material type" is the most important consideration

Material > Price > Design/Cutting > Function > Brand Reputation

Conscious Consumer Behavior

	• Clothing		• Bedding
	76% / 74%	88% / 86%	40% / 40%
	Conduct research before purchase	Read hangtags	Willing to pay more for sustainable products

Product Description

Consumers favor products

- **50%** described as "Natural" and "Eco-friendly"
- **60+%** have a "Recyclable" and "Biodegradable" afterlife

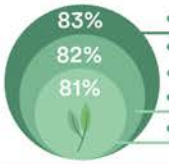
Commitment

Top five features that define a trustworthy brand

1. Commitment to using sustainable raw materials
2. Transparency in raw materials used
3. Products passing quality control
4. Using recycled materials
5. Production process transparency

Brand Transparency

Consumer considerations for a transparent brand



- Ingredients used
- Origin of raw materials
- Production processes
- Sourcing of raw materials
- Sustainable company practices

Top three information elements needed by consumers to develop confidence in a sustainable brand

- 87% What raw materials were used
- 87% What overall impact the brand has on the environment
- 86% Whether the product was produced in a sustainable manner

Lenzing's Approach

- As a sustainability leader that is trusted by consumers, retail brands and supply chain players, Lenzing supports industry initiatives that improve sustainability, enhance transparency and raise environmental protection standards.
- TENCEL™ branded fibers are made from wood pulp sourced from sustainably managed forests and produced in an eco-responsible process to ensure biodegradability.

Forest > Wood > Pulp > Fiber > Yarn > Fabric > End Application

Three-pillar approach for industry collaboration:

- Special fiber identification technology
- Blockchain-based tracking system
- Proactive supply chain collaboration and planning
- \+ Lenzing E-branding system

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The key trends and consumer habits predicted for 2021 as derived from the survey:

1. **More consumers are educating themselves on brands' sustainability commitments and are less likely to remain loyal to those with lackluster green credentials**: 76% of the consumers will conduct research before buying clothing and 74% before purchasing bedding.

2. **Transparency across the supply chain is essential for boosting a brand's credibility**: 83% of consumers considers ingredients used; 82% factor in origin and sourcing of raw materials and production processes; and 81% take into account sustainable company practices.

3. **Specific eco-friendly terminology and detailed information on product hangtags can generate consumer favor:** 50% prefer products described as "natural" and "eco-friendly," and 60% favor products having a "recyclable" and "biodegradable" afterlife. 88% of consumers will read clothing hangtags before purchase, and 86% will read bedding tags.

4. **Sustainable offerings wield new power in consumer perception:** 80% are "extremely/very interested" in sustainable fashion and 86% think sustainable raw materials equate to a more eco-friendly lifestyle. 40% are willing to pay more for sustainable apparel and bedding products respectively.

5. **Material type trumps price and other considerations in influencing purchase decisions:** 87% of consumers evaluate what raw materials are used and measure the overall impact the brand has on the environment.

A guide for brands to better cater to emerging consumer demands

The pandemic has created a crucial window of opportunity for brands to reassess their current business models and sustainability commitments. Forced to adapt to social distancing measures and reduce output alongside reduced demand, COVID-19 encouraged brands to rethink their complex supply chains. As evidenced by Lenzing's Global Consumer Survey, these moves must continue. Brands must accelerate shifts away from polluting production practices and unsustainable raw materials, and provide better traceability across the value chain.

Currently, the crowning achievement of a brand's sustainability journey is considered by many to be carbon neutrality. To take the important first step toward carbon freedom, companies must be able to better quantify carbon emissions throughout a garment's production cycle, enabling a tailored reexamination of the supply chain and traceability measures. For example, leading eco-fashion designer Allbirds outlines the specific carbon footprint of each product it sells. Beyond assisting with internal reexaminations for sustainability, consumers can use this information to hold the brand accountable for the sustainability commitments it makes.

The pathway to achieving 100% carbon neutral status is undoubtably long and complex. To ensure brands are moving ever closer to this goal, a robust roadmap should be adopted that outlines plans for carbon emissions reductions and carbon offsetting schemes. For example, Lenzing has committed to reducing specific greenhouse gas emissions by 50% by 2030 and achieve carbon-zero by 2050. In September 2020, to support that goal, Lenzing launched carbon-zero TENCEL™ branded lyocell and modal fibers which follow the stringent guideline of the "The Carbon Neutral Protocol", a leading global framework for carbon neutrality. The fibers will contribute to lower carbon emissions and energy consumption across the supply chain. It is encouraging to see that many companies across the industry are already working towards similar promise for building a better and more environmentally friendly future.

In short, to play a role in better preserving the environment, brands must publish carbon emissions output online for consumers to easily trace the origins of their purchase, subscribe to industry-recognized labelling, use verified and trusted eco-fibers, and collaborate with likeminded partners across the industry in a joint effort to move toward a sustainable future

Moving toward 2021

Some brands have decided to upend trends in favor of launching cross-seasonal collections at a lower volume and higher quality. By focusing on crafting timeless pieces, brands are avoiding problems that have plagued the industry for years, including over-supply and the consumption of easily disposable items that will end up in landfills sooner. We expect season-less trends to become even more pervasive in 2021.

Conscious consumers are now scrutinizing brands' sustainable credentials, dedicating the time to making mindful purchases with the protection of the environment at the forefront of their consumption practices. Soon, we expect consumers to no longer have an appetite for unsustainable fibers and fabrics.

Beyond encouraging consumers to purchase sustainable textile products, brands should take the chance to educate consumers about what other aspects of their lives can they make more eco-friendly, with the end goal of adopting a holistically sustainable lifestyle. Now, more than ever, brands must step up, prioritize corporate citizenship initiatives and invest in long-term sustainability practices that will protect our planet for generations to come.

Note :Photo Credit Lenzing