

Tourists' Luxury Value and Sustainability Perceptions of South African Exotic Leather Products

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Abstract: Travelling mostly involves expenditure on products beyond daily consumables (i.e. tourism shopping), but sometimes tourists visit a country with the specific intention of acquiring goods unique to that particular context, either for personal or commercial use. This type of “shopping tourism” contributes to the growth of luxury markets such as the exotic leather industry. In stimulating shopping tourism and promoting the local exotic leather industry, it is crucial to understand tourists' underlying perceptions and sustainable values that influence their luxury shopping behaviour. Using animal skins to create fashion accessories involves several environmental concerns and remains controversial among American and Chinese consumers, who rank among the world's top luxury goods spenders. This research, therefore, investigated American and Chinese shopping tourists' luxury value perceptions, sustainability excellence perceptions, and purchase intent for South African exotic leather products. Data was derived from a purposive sample including both American and Chinese tourists, aged 25 years and older, who had either visited South Africa in the past or intended to visit the country soon. A structured online questionnaire consisting of scales adapted from prior empirical research was developed. The English version of the questionnaire was translated into Mandarin and Cantonese for Chinese tourists. Data analysis involved two structural equation models (one based on the American and another on the Chinese tourists' responses) to test hierarchical relationships among variables. The results confirm that personal luxury value strongly influences sustainability excellence and the purchase intent of exotic leather products for both American and Chinese respondents. These findings highlight the potential of positioning South Africa as a luxury shopping tourism destination for exotic leather products, thus contributing toward economic growth and employment opportunities. However, environmental concerns must be addressed to conform to Eastern and Western tourists' sustainable luxury value perceptions.

Keywords: Exotic leather, Luxury Value, Shopping Tourism, Sustainability Excellence

1. Introduction

The global luxury market (including exotic leather products) is one of the fastest-growing and most profitable segments worldwide (Hennigs et al, 2015). This market is spread across various countries and thus influenced by different cultures, resulting in multiple luxury value perceptions and other underlying motives for buying luxury goods (Shukla, 2012). Currently, America and China are still seen as the world's two largest luxury goods markets (Statistica, 2024), with consumers who seek to travel and spend their income on luxury goods across the globe, including South Africa (Kapferer and Valette-Florence, 2016). Therefore, understanding these consumer segments' unique luxury value perceptions, including perceptions about sustainability issues and their willingness to acquire exotic leather luxury products, is essential for growing the local exotic leather luxury industry. Sustainability, in particular, has become a priority for the luxury goods market since consumers have become increasingly conscientious, thus changing the conventional approach to marketing luxury products such as exotic leather goods (Hennigs et al, 2013).

The luxury value perception framework, initially developed by Wiedmann, Hennigs and Siebels (2009) and further advanced by Shukla and Purani (2012), served as a theoretical basis for this study. This framework postulates that luxury value is based on four dimensions, namely financial, functional, individual and social value. Theoretically, it is argued that these luxury value perceptions are compatible with the pursuit of sustainability and collectively form the basis for perceptions of “sustainability excellence”, which, in turn, influence consumers' perceptions of and purchase intentions for sustainable luxury goods (Hennigs, Wiedmann and Klarmann, 2013). However, to date, the interrelationship of these concepts has not been extensively investigated in the exotic leather industry. It is further argued that consumers' perceptions of luxury value and sustainability excellence could be influenced by their nationality, cultural profile and background since value perceptions and consumption motives may differ from one country and culture to the next (Sharma, 2010; Aliyev & Wagner, 2018).

Therefore, this study's overarching aim was to compare American and Chinese tourists concerning the interrelationship of their luxury value perceptions, perceptions of sustainable excellence, and purchase

intentions towards exotic leather products. It was envisaged that the findings of this study would enable stakeholders in the local exotic leather industry to effectively market luxury exotic leather goods to both American and Chinese tourists in a sustainable, effective and value-focused manner.

2. Literature Review

2.1 Luxury Associated with Exotic Leather Goods

The word “luxury” is derived from the Latin word “Luxus”, which describes excessive and splendid living, extravagance, wealth and affluence (Christodoulides, Michaelidou and Li, 2009). Thus, luxury goods relate to excessive possessions that extend beyond necessity (Brun and Castelli, 2013) and are primarily associated with quality, exclusivity and status (Atwal and Williams, 2009). Most luxury goods are bought for the connotations linked to them rather than for functional use (Hennigs, Wiedmann and Klarmann, 2013). Derived from alligator, crocodile, ostrich, snake, and lizard skin, exotic leather is defined as leather that is either made from relatively rare animal species or from skin parts of animals that are hardly ever processed into leather (Leather Dictionary, 2024). Because it is not derived from cows, pigs, goats, sheep, buffalo and zebra, it accounts for less than 1 % of the world’s leather production (Mendal, 2016). It is often imbued with connotations of quality, exclusivity, and status. Its unique and rare texture, look, and colour set it apart from conventional leather. For many years, it has served as a differentiating factor in the designs of many luxury fashion brands.

2.2 Luxury Value Perceptions

In the case of luxury goods such as exotic leather products, individuals’ assessment of the subjective worth of products can be determined by their specific value perceptions of luxury. The luxury value perception framework of Wiedmann, Hennigs and Siebels (2009), which was further advanced by Shukla and Purani (2012), offers an essential theoretical basis to interpret consumers’ luxury value perceptions based on four dimensions, namely financial, functional, individual and social value. These value dimensions function independently but also work together to shape and influence consumers’ luxury value perceptions, purchase intent and behaviour (Wiedmann, Hennigs and Siebels, 2009). The financial dimension of luxury value perception refers to the product's value expressed in monetary terms, such as price and investment, and what had been sacrificed to obtain the product. It is important to note that consumers often discriminate between the actual price of a product (i.e. objective price) and the perceived cost from their own subjective perspective (Wiedmann, Hennigs and Siebels, 2009). The functional dimension of luxury value perception relates to physical product benefits such as quality, uniqueness, usability, reliability, and durability (Wiedmann, Hennigs and Siebels, 2009), thereby recognising the product’s functional or utilitarian value and its ability to perform the desired function (Shukla, 2012, Shukla and Purani, 2012). The individual dimension of luxury value perception is centred on personal aspects such as self-identity, hedonism and materialism (Vigneron and Johnson, 2004), thus relating to consumers’ personal orientation towards luxury consumption (Wiedmann, Hennigs and Siebels, 2009), including their emotional needs, experiential rewards, hedonic motives, materialistic attitudes, sensory pleasure and acts of self-gift giving (Hennigs et al, 2015). Luxury consumers intently focused on personal motives are typically more concerned with matching their individual tastes and internal self with the luxury product’s image and deriving an enjoyable experience from purchasing and owning the product (Shukla, 2012). Lastly, the social dimension of luxury value perception focuses on outer-directed consumption preferences, such as conspicuousness, symbolism and prestige value, thus relating to the instrumental aspect of impression management and the pursuit of social approval through consumption (Shukla, 2012; Vigneron & Johnson, 2004; Wiedmann, Hennigs and Siebels, 2009).

2.3 Sustainability Excellence

Consumers are increasingly more concerned about environmental and social issues in the luxury fashion supply chain, ranging from harmful emissions and chemical pollution in production processes to excessive waste (Mok, Yu and Zihayat, 2022). Such concerns also specifically include the farming and slaughter of animals for their skins and fur, along with the reasonable management and rights of the workers employed in this supply chain (Shaw and Shiu, 2003). For these reasons, supply chain transparency and ethics have become in high demand (Shen et al, 2012), and consumers’ support of sustainable and ethical luxury products has significantly escalated - luxury brands thus acknowledge that “sustainability excellence” has become the norm rather than the exception (Hennigs et al, 2013) Kapferer and Michaut (2015) further explain that, even though luxury consumers may not

always voice their interest in sustainability issues when they purchase a luxury product, they notwithstanding expect sustainability practices to be adhered to by the producer/ supplier of such products.

Sustainability excellence can thus be conceptualised as consumers' overall sustainability value perceptions of luxury that are motivated by their individual perceptions and subjective expectations of luxury value (Hennigs et al, 2013). In line with the original luxury value perception framework proposed by Wiedmann, Hennigs and Siebels (2009), Hennigs et al. (2013) further refined the framework to include luxury value-based sustainability, as illustrated in Figure 2. This framework depicts sustainability excellence at the core of the four luxury value perceptions (i.e. financial, functional, individual, and social value) that were discussed in section 2.2.

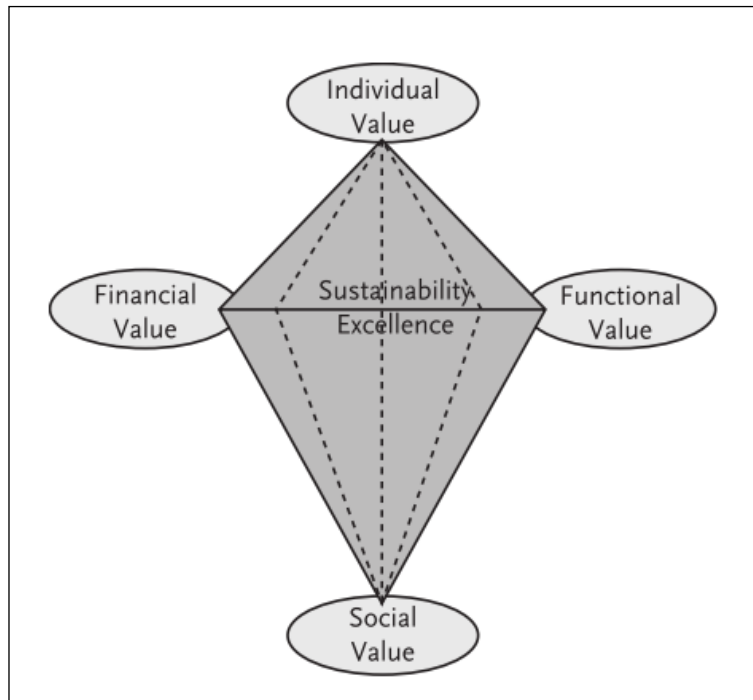


Figure 1: A conceptual model for luxury value-based sustainability (Hennigs et al, 2013)

The argument brought forward is that consumer' luxury value perceptions combined with their perceptions of sustainability excellence could influence their purchase intent for luxury goods such as exotic leather products. Yet, the interrelationship of these concepts requires further investigation in the exotic leather sector. This luxury segment has received comparatively limited attention in current literature surrounding luxury goods and, more specifically, within the context of tourists' luxury shopping behaviour. Many debates surround the importance of ethical considerations in the decision-making process for luxury exotic leather products, and some might question whether strong luxury values are, in fact, compatible with sustainability values for these products.

2.4 Positioning South Africa as a Luxury Shopping Destination for Exotic Leather Products

Although the South African domestic luxury market remains small compared to international luxury markets (e.g. the UK, US, Korea and China), exotic leather products, such as personal accessories, are an essential segment of the South African luxury market. Thanks to sustainable practices, standards and systems of accreditation that are promoted by industry stakeholders and non-profit organisations such as Exotic Leather South Africa (South Africa Online, 2024), as well as financial incentives from the South African Department of Trade and Industry, the local exotic leather industry is well positioned to tap into the international luxury markets and to develop sustainable world-class exotic leather goods (TMG Digital, 2016). South Africa mainly produces two types of exotic leather, namely ostrich and crocodile leather. These leathers are considered scarce and exclusive and, coupled with their high-quality characteristics and unique aesthetic appearance, are highly sought-after raw materials that are often exported for manufacturing products targeted at international luxury markets (Ferreira, 2017). However, international tourists who visit South Africa to acquire luxury goods unique to the country may offer lucrative grounds for further expansion of the local exotic leather industry and retain profits within the countries' borders.

Recent reports issued by Statistics South Africa (2023) show that North America and China are among the top 10 leading overseas countries in terms of the number of tourists visiting South Africa, while China has shown the highest year-on-year increase of tourists to South Africa. Regarding revenue, America and China are also ranked among the world's leading luxury goods markets, particularly for the apparel and shoes sector (Statistica, 2024). Previous studies showed that consumers from different nationalities, cultural backgrounds, and market segments may differ concerning their perceptions of luxury value (Alegre and Cladera, 2012) and sustainability value (Leiserowitz, Kates and Parris, 2006). Consequently, it is of the utmost importance for marketers of luxury exotic leather products to understand these tourists' luxury value perceptions and their perceptions of sustainability value. Additionally, if South Africa wants to compete with luxury brands internationally, marketers must align their product offerings and marketing with their target markets' most crucial luxury value perceptions and perceptions of sustainability excellence. Based on the arguments mentioned above, the following research question was formulated for this study: *How do American and Chinese tourists compare with regard to the interrelationship of luxury value perceptions, perceptions of sustainable excellence and purchase intentions towards exotic leather products?*

3. Methodology

This study adopted a cross-sectional quantitative research approach. It was based on an existing data set gathered for a larger project conducted by the University of Pretoria in partnership with the Exotic Leather Research Centre (ELRC). Qualtrics, a reputable and well-known international research firm, was contracted to recruit respondents and collect data within the study's allocated timeframe. Using non-probability convenience sampling, Chinese and American tourists who had visited South Africa in the previous five years or intended to travel to South Africa in the following five years were purposely targeted to participate in the study. Many Chinese and American tourists travel yearly to South Africa, and the USA and China are ranked among the top luxury markets worldwide (Statistica, 2024; Statistics South Africa, 2023). Previous research has also shown that the differences in luxury consumption and value perceptions between Eastern and Western consumers may be significant (Alegre and Cladera, 2012) and thus warranted a comparison of these two nationalities. A final sample size of N=1 043 male and female respondents (aged between 25 and 45 years) voluntarily participated in the study, of which approximately half (n=518) were American and half (n=518) were Chinese. Although non-probability sampling limits the generalisability of research findings, it was deemed appropriate for the exploratory purposes of the overarching research project.

The research group developed an online survey questionnaire for this study. The first section of the questionnaire assessed the demographic profile of the respondents, including their prior or intended travels to South Africa, along with their interest in exotic leather products. The second section determined respondents' luxury value perceptions (including financial, functional, social and individual values) based on scale items derived from previous empirical research (Hennigs et al, 2012). The third section measured respondents' sustainable luxury value perceptions about exotic leather products such as crocodile and ostrich leather goods. The questions included in this section were based on Hennigs et al's (2013) theoretical model of sustainability excellence with responses anchored on a 5-point Likert scale (ranging from 1 = strongly disagree to 5 = strongly agree). The last section included a scale developed by Spears and Singh (2004) to determine respondents' purchasing intent based on a 5-point Likert scale (ranging from 1 = never to 5 = definitely). Qualtrics translated the survey questionnaire from English to Cantonese and Mandarin, ensuring lexical equivalence, clarity and eliminating potential errors in a pilot study before proceeding with data collection. Ethical clearance was obtained before data collection, and all respondents consented to anonymously completing the online questionnaire. Responses were captured electronically and, after that, subjected to various statistical procedures, including exploratory factor analysis (EFA), confirmatory factor analysis (CFA), and structural equation modelling (SEM) utilising SPSS AMOS software. The following section will predominantly report results derived from the SEM procedures performed on the respective American and Chinese datasets.

4. Results and Discussion

To determine the interrelationship of luxury value perceptions and sustainability excellence as antecedents of American and Chinese tourists' purchase intentions for sustainable exotic leather products, SEM models were specified for both the American and Chinese datasets, which comprised five latent factors (based on prior EFA and CFA procedures), namely personal (pleasure) luxury value, social luxury value, exclusive (financial) luxury value, sustainability excellence and purchase intent. Prior EFA and CFA procedures revealed that only 3 of the original four luxury value perceptions, as postulated by Wiedmann, Hennigs and Siebels (2009), manifested in

these datasets. More specifically, functional luxury value did not emerge as a distinct factor and seemingly fulfilled a secondary role in respondents' overall luxury value perceptions.

Before commencing with SEM, discriminant and convergent validity were sought for all the remaining factors. Even though some did not achieve satisfactory convergent validity, all of the factors complied with the discriminant validity criteria, which allowed for further SEM analysis. The results of the SEM analysis in both datasets revealed that personal-, social- and exclusive luxury values are strongly correlated concepts, which is to be expected since they all form part of a person's overarching luxury value perceptions. Although both the American and Chinese datasets obtained an acceptable model fit, the model fit for the Chinese dataset was superior to the corresponding model fit for the American dataset, as illustrated in Table 1.

Table 1: Comparison of SEM model fit for the American and Chinese datasets

Model fit indices	CMIN	DF	P	CMIN/DF(χ^2)	NFI	CFI	RMSEA
The goodness of fit criterion				$2 \leq x \leq 5$	≥ 0.95	≥ 0.95	≤ 0.070
American dataset (n=518)	188,342	124	0,000	1,519	0,953	0,983	0,032
Chinese dataset (n=525)	140,228	124	0,151	1,131	0,962	0,995	0,016

Figure 2, which is based on the American dataset, reveals that personal luxury value, social luxury value and exclusive luxury value collectively explain 72% of the variance in sustainability excellence. Moreover, 82% of purchase intent variance is jointly explained through personal luxury value, social luxury value, exclusive luxury value and sustainability excellence.

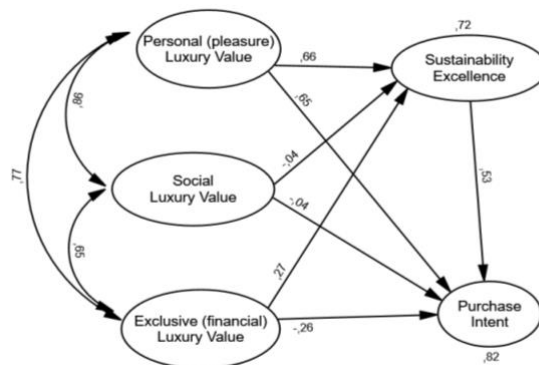


Figure 2: Structural Equation Model (SEM) based on the American dataset (n= 518)

Figure 3, which depicts the SEM model based on the Chinese dataset, shows that personal luxury value, social luxury value and exclusive luxury value collectively explain 65% of the variance in sustainability excellence. For purchase intent, 68% of the variance is jointly explained through personal luxury value, social luxury value, exclusive luxury value and sustainability excellence. These values are somewhat lower than the corresponding values in the SEM model specified for the American dataset.

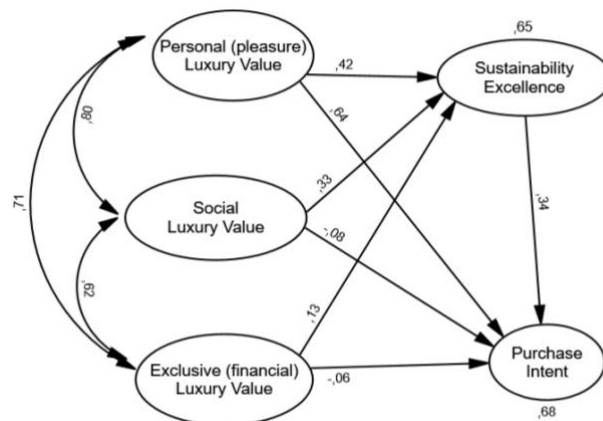


Figure 3: Structural Equation Model (SEM) based on the Chinese dataset (n=525)

In comparing Figures 2 and 3, the personal luxury value was found to have the strongest influence on sustainability excellence and respondents' intention to purchase exotic leather luxury goods for both the American (respectively $\beta = 0.66$, $\beta = 0.65$) and Chinese (respectively $\beta = 0.42$, $\beta = 0.64$) datasets. As pointed out in the literature review, consumers' personal luxury values are related to personal motives for buying exotic luxury leather goods, including matching their personal tastes and preferences with the product's image and gaining personal enjoyment from the product (Shukla, 2012). Additionally, satisfying the self is an essential concept of luxury consumption and relates to the expressive aspect of impression management (Tsai, 2005). It would seem that both American and Chinese consumers are alike in their consumption of luxury goods to derive self-directed or personal hedonic experience as well as symbolic benefits from it, as postulated by Shukla (2012).

In the American SEM model (Figure 2), it is seen that social luxury value had a negative, weak and insignificant influence on both sustainability excellence ($\beta = -0,04$) and purchase intent ($\beta = -0,04$). In the Chinese SEM model (Figure 3), social luxury value also had a negative, weak and insignificant influence on purchase intent ($\beta = -0,08$), yet it proved to be more significant as a predictor of sustainability excellence ($\beta = 0.33$). The fact that social luxury values had a limited impact on both American and Chinese respondents' purchase intent may support Shukla's (2012) statement that conspicuousness value is no longer a significant predictor of luxury consumption across developed and emerging markets. As times change, consumers worldwide are avoiding social prestige or status-driven displays of luxury brands and abandoning prominent displays of brand names and logos as they settle for more subtle designs (Shukla, 2012). The positive influence of social luxury value on sustainability excellence ($\beta = 0.33$) in the Chinese model, on the other hand, may confirm Shukla's (2012) observations that luxury consumers in Eastern emerging markets may be more concerned about the perspectives of others when consuming luxury goods, specifically as it relates to sustainability issues.

In both the American and Chinese SEM models, the exclusive luxury value had limited influence on sustainability excellence. However, the path coefficients between exclusive luxury value and sustainability excellence were slightly stronger in the American SEM model ($\beta = 0.27$, $p = 0,008$) than in the Chinese SEM model ($\beta = 0.13$, $p = 0,139$), which also had a p -value > 0.1 . As for the influence of exclusive luxury value on purchase intent, both American ($\beta = -0,26$) and Chinese ($\beta = -0,06$) datasets presented a negative, non-significant influence. Contrary to Wiedmann, Hennigs and Siebels (2009) as well as Hennigs et al (2015) view that status-conscious luxury consumers often tend to perceive high price cues and rareness as an indicator of exclusiveness and prestige, the American and Chinese SEM models in this study indicate that exclusive luxury value does not have a significant influence on sustainability excellence nor purchase intent. The assumption that can be made is that luxury exotic leather products are expected to be rare and expensive and would, therefore, not have a decisive influence on purchase intentions. Furthermore, its exclusivity is not related to its sustainability features.

Finally, both SEM models (Figures 2 and 3) reveal that sustainability excellence is a strong predictor of purchase intent, although the American dataset presented a stronger influence ($\beta = 0.53$) than the Chinese dataset ($\beta = 0.34$). Moreover, the American sample had a stronger intention to buy an exotic leather luxury product because of its sustainable values than the Chinese sample. According to Hennigs et al (2013), luxury consumers are increasingly aware of social and environmental concerns and prefer to support sustainable and ethical products that reveal their personal beliefs and values. The findings of this study indicate that these concerns may be more pronounced among American respondents than their Chinese counterparts.

5. Conclusion and Future Research Recommendations

In conclusion, this study's findings offer practical insight for stakeholders in the South African exotic leather Industry about the relevance of American and Chinese tourists' luxury- and sustainability value perceptions, which could further guide their marketing strategies. Since sustainability excellence emerged as a strong predictor of purchase intent among both American and Chinese tourists, international competitiveness could be improved through sustainable and ethical trading practices and by improving the sustainable quality and traceability of exotic leather products. In addition, marketing communication may benefit from emphasising the personal luxury value dimension of exotic leather goods in targeting both American and Chinese tourist segments rather than focusing on social or exclusive luxury value perceptions, which are seemingly not as important.

In addition to practical implications, the study's findings add theoretical insight to existing literature surrounding luxury value perceptions and sustainability excellence, which to date has not been extensively explored in the context of exotic leather luxury products. In this regard, this study may serve as a foundation for future studies that further investigate luxury value perceptions and sustainability excellence in the local luxury market. Yet,

future studies may benefit from larger and more representative samples to ensure that results can be generalised to a broader population. Since this study only included American and Chinese tourists, future research could also be extended to include other nationalities, generating more encompassing cross-cultural perspectives that could have much value for the local exotic leather and tourism industry.

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