

DETERMINANTS TO THE CONSUMPTION OF LEATHER PRODUCTS

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Abstract: *The current paper looks at some of the determinants in the consumption of leather fashion products by the 16-34 year old population of Québec. Although the Québec population presents some idiosyncrasies, we surmise that our results could probably be generalized to similarly aged population groups in the western world. Leather goods are now often considered as luxury items, a sub-sector of the fashion industry which has been outgrowing all others in the last few years. Yet leather is often seen as non-ethical, requiring the killing of animals, and non-ecological, since the production process is polluting. Those two opposing forces make the future of leather very uncertain. Surprisingly, very little literature has been written on the subject.*

This paper presents a survey in which the authors tried to identify the determinants to the consumption of leather in the 16-34 age groups, often referred to as Generation Y. Our findings reflect this dichotomy between the consumer's interest for apparel and his or her negative reaction to some characteristics of leather. Although not as influenced as fur by ethical and ecological concerns, leather products the object of similar reactions.

This paper concludes on some recommendations to participants in the leather industry who should note this trend and try to position their products in such a way as to minimize the negative elements and bank on the more positive aspects.

Key words: *Leather, Apparel, Consumer behaviour, Luxury*

1. INTRODUCTION

The present paper has roots in two different literature streams.

The first deals with the production of leather goods. The treatment of an animal's hide to turn it into leather is a relatively dirty and polluting process. Today's consumer being more and more concerned with ethical behaviour and protection of the environment, this situation may impact negatively on the sale of leather products. Moreover, the fact that natural leather requires the killing of an animal, also has, though at a lower level than in the case of fur, an impact on the consumer's perception.

The second focuses on attitudes and consumption of luxury goods. The arrival of LVMH in the leather trade has clearly stated that leather goods often are luxury items. Knowing that the commerce of luxury goods has fast outgrown the consumption of other apparel, the leather trade is therefore in a position to rapidly become more and more important in the coming years.

Since there have been very few articles trying to evaluate the impact that the above two factors may have on the commerce of leather, we looked at the consumer's perception of leather when shopping for apparel and accessories, and more specifically at how some of the determinants to the purchase of leather may behave in a manner closer to the consumption of fur than to the consumption of general apparel and accessories.

2. LITERATURE REVIEW

The emphasis that the LVMH group has placed on leather goods and its acquisition of companies in this area in the last decade and a half has clearly marked the arrival of leather in the luxury sub-sector [1]. Knowing that luxury goods and brands represent an important part of today's global economic activity [2] and that they have fast outgrown other areas in the last decade, one can

only forecast a fairly positive outlook for the commerce of leather apparel and accessories. At the same time, young consumers are now more and more attracted to this segment of the market; hence, in a market characterised by increased competitiveness and the saturation of certain sub-segments, they present a potentially profitable target market [3]. The young consumer often is at the forefront of cultural and consumption changes; Widdicombe and Woffitt even use the term “barometers” of cultural change and evolution [4]. Younger consumers are also perceived as being more susceptible to marketing campaigns: in this light they constitute an ideal target market for fashion communications [5].

Another factor favouring the expansion of the leather trade in apparel and accessories is the emphasis now put on the sustainability of the industry [6]. As mentioned by McDonough and Braungart [7] this sustainability should not be understood as a simple return 100% natural fibers and raw materials, as the resale of garments or the reuse of materials also offers an interesting avenue (Fletcher and Grose [8] talk about a process starting with the fibers’ selection, ending with the possibility to give the product a the second life) yet some sustainable materials, like leather, may have a particular appeal.

There also is a negative side to the consumption of leather. One will argue that leather production is a highly polluting process. To counter this reality, most important leather production countries have passed laws to ensure that the process is conducted in as sustainable a manner as possible [9]. Yet some pressure groups such as PETA [10] still point to the weaknesses of the production process. A number of consumers are influenced by such organisations and consider that the fact that leather production requires the killing of animals makes it, almost by definition, an non-ethical process [11]. Yet not all of them are; some consumers react to this trend toward political correctness [12] and adopt a more positive attitude to the consumption of leather goods. In some of the relatively small literature looking at the consumer’s perception of leather, Belton and Clinton have found that one’s overall perception of leather consumption, one’s environment, and one’s education level all impact on the consumers’ propensity to buy exotic leather goods [13]. Belleau *et al.* have also found that fashion oriented people will also see the consumption of leather in a more positive light [12].

In spite of the growing emphasis on the consumption of ecological goods, and the abundance of articles on the consumption of fur, one must note that very little has been said or written on the consumption of leather goods, and more specifically of fashionable leather goods.

3. METHODOLOGY

We developed two questionnaires comprised of 15 questions of which 5 pertained to socio-demographic information whereas the remaining 10 looked at the determinants in the consumption of, in the first case, leather fashion goods and, in the second case, the consumption of fur products. The questions also compared the respondents’ perceptions of fake leather goods to real leather and similarly of fake fur to real fur. Since “younger” consumers account for an important part of apparel purchases and represent the future market, we chose to focus on the 16-34 age groups.

The hearth of our questionnaires was built on three questions asking respondents to evaluate the importance of 11 determinants in their consumption of apparel in general, leather goods and fur goods along with their synthetic counterparts. The determinants chosen were those generally mentioned in the literature on apparel/fashion consumption: style, durability, material, and ecological impact, ethical considerations, country of manufacture, brand name, environment (parents, friends), price, vendor location, ease of care. Respondents were asked to rate these 11 on a scale of 1 to 10 (1 being not important at all and 10 being very important).

The leather questionnaire led to 1145 valid responses whereas the fur questionnaire gave us 1016. The survey was limited to the province of Québec for convenience purposes. Our samples were non-probabilistic using a snowball, or chain sampling, approach. It was passed on the internet during the month of October 2013 using Survey Monkey, with the help of two of our students’ groups who were asked to transfer the surveys to as many people as possible in these age groups with the only caveat that they must not be related to the Fashion School. The data were analyzed with SPSS.

4. RESULTS

We first compared our two groups on the general apparel determinants to ensure that they were indeed comparable. As expected, since the respondents knew from the start the questionnaires focused on either fur or leather, no significant differences appeared between the groups answering the leather questionnaire and the one filling the fur one except on those items which may be more “material” specific: ecological impact ($t = -4,173$; $sig. = 0,000$), ethics ($t = -2,732$; $sig. = 0,006$), and

country of origin ($t = -3, 713$; $\text{sig.} = 0,000$). In all three cases, as the negative value of the t-test shows, respondents gave more importance to these determinants when answering a fur questionnaire.

Our leather sample was comprised of 821 females and 315 males. Although we had a definite over representation of females which should sound an alarm bell when trying to generalize our findings, we had a sufficient number of male respondents to do so. The same imbalance was found in our age groups (with 807 respondents in the 16-24 group and 338 in the 25-34 group) yet even our smaller group was sufficiently important to enable us to feel confident about our findings. Our sample was fairly representative of the Québec population, in these age groups, in terms of education with a slight over representation of respondents with a college or university degree.

We first looked for confirmation of Belleau *et al's* findings to somewhat validate that our results were in line with previous research. We tested our question on the respondents' self-appraisal of their interest for fashion, in comparison with their peers (on a scale of 1 to 6 with 1 being much less and 6 much more) with their answers on the probability that they purchase a leather garment or accessory in the coming two years. We found a very strong correlation ($r = 0,311$; $\text{sig.} = 0,000$) thereby confirming Belleau *et al's* findings. We also tested Belton and Clinton's finding of a positive relationship between people's intention to purchase a leather item and education level. In this case, like these authors, we found a strong positive relationship ($F = 8,170$; $\text{sig.} = 0,000$) between education and the intention to purchase a leather item.

ANOVAs were performed on the relationship between the determinants to leather goods consumption and the level of education. Our results show a positive relationship between the importance of the ecological impact ($F = 5,851$; $\text{sig.} = 0,001$) and of the country of origin ($F = 4,632$; $\text{sig.} = 0,000$); the importance of ethical concerns is fairly equal among all educational levels. One possible explanation is that the concern for ethics is more generalized throughout the population. Correlation analyses between one's perceived interest for fashion and ethics, ecological impact, and country of origin (as determinants to the consumption of leather) lead to no highly significant results ($\text{sig.} < 0,001$).

For ease of further analysis and discussions of our findings on the overall importance of consumption determinants, we reclassified all answers on our core questions (impact of determinants on purchase of apparel, leather goods, and synthetic leather goods) into three broad categories: little or no importance (scores of 1 to 3), some importance (scores of 4 to 7), very important (scores of 8 to 10). It is interesting to note (see table 1) that the importance of the selected determinants are fairly similar between general apparel items and fake leather goods with the exception of durability which appears much less important in the case of fake leather (a difference of more than 10 percentage points). This may in part be explained by the fact that a fake leather item may be bought with very current, faddish, fashion considerations in mind.

On the other hand, one also notes that determinants of leather items purchases differ importantly from those identified for regular apparel. In fact: style, durability, material, and country of origin score more than 10 % higher in terms of the importance that these determinants have on the purchase of leather goods as compared to regular apparel. Elements of style and durability may be explained by the cost of the items, in comparison to regular apparel, while the material and country of origins may be linked to the consumer's need for reassurance that he or she is purchasing an item made of genuine leather.

Insofar as the leather consumer is concerned, a factor analysis (Varimax rotation) shows that we can find three sub-groups of determinants. The first is comprised of style, durability, material, and price and explains 48 % of the variance in the purchasing decision. The second, made up of ecological impact, ethics, and country of origin explains 13,3% of the variance.

Table 1 also shows that, in most cases, where a difference exists between the sexes, women, in general, attach more importance to most determinants. On the other hand very little difference shows up between the two age groups studied.

Table 1: Leather survey results

Leather	Apparel					Leather					Fake leather				
	% Very important	Diff. M/W		Diff. Age (Y/O)		% Very important	Diff. M/W		Diff. Age (Y/O)		% Very important	Diff. M/W		Diff. Age (Y/O)	
		t-test	Sig.	t-test	Sig.		t-test	Sig.	t-test	Sig.		t-test	Sig.	t-test	Sig.
Style	78,6	-4,628	0,000			69,9	-3,147	0,002			64,2	-5,660	0,000		
Durability	52,5			-3,231	0,000	73,3	-4,416	0,000			41,1				
Material	43,3	-2,837	0,005			66,6	-3,893	0,000			36,8				
Ecological impact	18,0	-3,673	0,000			22,8	-4,640	0,000			15,5				
Ethics	17,6	-2,310	0,021			24,8	-3,089	0,002			15,7			-2,196	0,030
Country of origin	10,8	-3,733	0,000			22,7	-2,357	0,019			10,9				
Brand	24,4	4,102	0,000			32,3					21,8	2,662	0,008		
Environment	13,3	-3,061	0,002	3,044	0,002	14,2	-2,314	0,021			14,1				
Price	65,1	-4,347	0,000			60,6	-2,782	0,005			62,0	-4,135	0,000		
Vendor location	22,1					26,5	-2,849	0,004	2,335	0,020	18,9				
Ease of care	35,5	-2,381	0,017	-3,671	0,000	43,0	-3,917	0,000			34,4			-2,599	0,009

Our fur sample was comprised of 685 females and 331 males. We find here the same imbalance as with the leather sample yet can here again state that our male sample was large enough to be of use. The same may be said of our age distribution with 716 respondents in the 16-24 age group and 305 in the 25 to 34.

The same observation can be made in this case as with leather in that there is limited variation in the importance of determinants between apparel and fake fur. The only determinants with a variation of more than 10 % are style, durability, and price. These may be explained in part by the fact that fake fur items, although not as expensive as real fur, are still, in general, at the expensive end of fashion items.

Here again, one finds major differences between real fur and general apparel. Whereas style is much less important, ecological impact, ethics, and country of origin are much more important. This is in line with the literature which shows that the commerce of fur still has this negative aura and the observation that consumers, in the western hemisphere, are shying away from fur.

Out of curiosity, as we did in the case of leather, Belleau *et al's* hypothesis (although they never looked at this possibility), we looked at the possible correlation between their perceived interest for fashion in comparison to their peers and the intention to purchase fur. Here again we found a positive correlation ($r = 0,238$; $sig. = 0,000$). As was the case with leather, and here again in spite of the fact that Belton and Clinton have not looked into the relation between education and the intention to purchase a fur item, we conducted an ANOVA and found a significant positive result ($F = 20,48$; $sig. = 0,000$). These two results, although weaker than in the case of leather, certainly open a further research avenue as to this positive relationship between education and one's interest for fashion, on one side, and one's "more positive" outlook on leather and fur.

Table 2: Fur survey results

Fur	Apparel					Fur					Fake fur				
	% Very important	Diff. M/W		Diff. Age (Y/O)		% Very important	Diff. M/W		Diff. Age (Y/O)		% Very important	Diff. M/W		Diff. Age (Y/O)	
		t-test	Sig.	t-test	Sig.		t-test	Sig.	t-test	Sig.		t-test	Sig.	t-test	Sig.
Style	78,6	-7,581	0,000	2,293	0,022	54,6	-5,123	0,000			61,6	-6,880	0,000		
Durability	52,9			-2,104	0,036	55,0	-3,761	0,000			40,6				
Material	44,8	-4,965	0,000	-2,164	0,009	53,1	-4,661	0,000			37,9	-2,955	0,003		
Ecological impact	17,9	-3,596	0,000			36,3	-3,174	0,002			24,5			-2,194	0,028
Ethics	20,7	-2,396	0,017	-3,552	0,000	37,7	-4,133	0,000			23,6				
Country of origin	15,6	-2,045	0,041	-3,206	0,001	27,7					14,4				
Brand	26,2	2,301	0,022			25,2					20,0				
Environment	16,2			1,963	0,050	13,7					12,2				
Price	65,9	-2,966	0,003			48,2	-3,606	0,000			52,1	-3,890	0,000		
Vendor location	22,6	-2,479	0,013			24,3	-2,241	0,025			17,3				
Ease of care	31,4	-3,751	0,000	-3,288	0,001	32,8	-2,007	,0045			34,6	-2,586	0,010		

We also performed ANOVAs on the relationship between the determinants to fur goods consumption and the level of education, and one's perceived interest for fashion. Here again our results show a positive relationship between the importance of the ecological impact ($F = 3,439$; $sig. = 0,004$) and the level of education of the respondents. As was the case with leather, no highly significant results ($sig. < 0,001$) could be found when correlating one's perceived interest for fashion and ethics, ecological impact, and country of origin (as determinants to the consumption of fur).

5. CONCLUSIONS AND RECOMMENDATIONS

The results presented above show that, in the 16-34 age group, ecological impact, ethics, and the country of origin of goods are important determinants in the consumer's decision process when he or she buys apparel. Although not as important as in the case of fur, these determinants are rated between 4 and 12 percentage points more important for leather goods than for regular apparel. Sellers of leather goods must therefore take good care not to forget these considerations when communicating with the young consumer. The country particularly stands out in the case of leather for which its importance is rated 11,9% higher than for regular apparel. Leather products often being at the higher price end of the apparel/accessories segment, consumers are all the more concerned with ensuring that they have the quality of product that they pay for.

Another observation is that women constantly assign all determinants, and more specifically the three we just discussed (ecological impact, ethics, and country of origin), a higher importance factor than males. Special attention must therefore be placed in the communications to women who not only buy for themselves but, as other studies have shown, often buy for other members of the family or are strongly influential in the decision process.

The above conclusions are all the more important when one notices that the determinants to the purchase of fake leather goods are in line with those of regular apparel and that the findings for real leather behave somewhat similarly to the determinants to the purchase of fur goods (although not in as important a way). One possible explanation of this state of affairs is that some of the discourse on the non-ethical aspects in the commerce of fur is transferred to the commerce of leather.

An important weakness of our research is that it was conducted only in the province of Québec. Yet other research has shown that the results found in Québec are partially generalizable to the rest of the country and from there to the rest of North America. Actors in the leather industry should therefore investigate the importance of ethics, ecological impact, and country of origin on the purchase of leather goods in order to position themselves appropriately in the market.

As mentioned in the above text an interesting research avenue arises from our findings. Whereas one can intuitively accept the positive link between one's interest for fashion and one's intentions to purchase a leather (or fur) item, this positive relationship between education and the intention to purchase leather or fur items is much less intuitive. Is this linked to better (or lesser) understanding of the ethical concerns and ecological impacts, to a better financial situation thereby enabling the more educated people to afford these items, to a lesser influence of pressure groups, etc. ?

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