

UNIVERSITE DE DROIT, D'ECONOMIE ET DES SCIENCES D'AIX MARSEILLE
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CENTRE D'ETUDES ET DE RECHERCHE
EN GESTION D'AIX MARSEILLE

WHO ARE CHINESE
LUXURY-BRAND CONSUMERS ?
AN EXPLORATORY STUDY*

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W.P. n° 841

April 2009

* This paper was accepted at the 25th International Conference of the Association Française du Marketing (14-15 May, 2009, ESCP-EAP, London).

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Qui sont les consommateurs de marques luxe en Chine ?

Une étude exploratoire

Résumé:

L'objectif de cette étude est d'explorer les valeurs et les attitudes vis-à-vis de la consommation de produits de luxe en Chine. Selon l'analyse d'entretiens réalisés en 2008, en Europe, auprès de quinze consommateurs chinois et la re-analyse de sept entretiens réalisés par Lu en 2002 avec des consommateurs chinois en Chine (Lu, 2004), deux dimensions des attitudes ont été identifiées. Quatre segments de consommateurs de produits de luxe ont ainsi émergé.

Mots clés :

La consommation des produits de luxe, valeurs, attitudes, segmentation

Who are Chinese Luxury-brand Consumers ?

An Exploratory Study

Abstract

The purpose of this study is to explore Chinese consumers' values and attitudes towards luxury-brand consumption. Based on the analysis of fifteen interviews conducted with European-Chinese consumers in 2008 and the re-analysis of seven existing interviews with Chinese consumers in mainland China carried out by Lu in 2002 (Lu, 2004), two attitudinal dimensions have emerged. Accordingly, four different consumer segments have been identified.

Key words

Luxury-brand consumption, values, attitudes, segmentation.

INTRODUCTION

China, a country of 1.3 billion consumers, is now considered as the most attractive luxury market with the highest growth potential in the world. The World Luxury Association shows that China's luxury consumption¹ in 2007 reached USD \$ 8 billion, already accounting for 18% of total global sales². There has been an increasing amount of research focusing on the Chinese luxury market. However, in China, this subject becomes more complex than in other countries due to the size and diversity of this market.

Since the relaxation of market restriction in China at the end of the 1970s, western culture has permeated this country, impacting many of China's traditional values. As a result, several researchers argue that Chinese consumers are influenced by both traditional as well as modern values (Yang, 1989; Zhang and Jolibert, 2003; Lu, 2004; Tsai, 2008). This leads to our first research question: *Living within this multicultural environment, what are the specific attitudes and behaviors of Chinese consumers towards luxury goods consumption?*

About 80% of the world's top luxury brands have already entered into China³. However, it is still hard to find a successful Chinese luxury brand. Our second research question, therefore, is: *How do Chinese consumers perceive the concept of luxury? What are the essential elements that constitute a luxury brand for Chinese consumers?*

An average disposable monthly income of 1,462 Yuan⁴ per Chinese household is still low⁵ when compared with developed Western countries. However, Chinese society is marked by the presence of "rich people". According to professional experts,⁶ in 2004 there were over 236,000 Chinese millionaires (in US \$), with that number having now doubled since. Around 100 million Chinese are considered to already have a standard of living comparable to that of Westerners. A recent Bain&Company survey of 1,200 mainland shoppers in 2008, shows that 35% reported to spontaneously purchase luxury items. Therefore, our third research question may be stated as follows: *Does income play an important role in Chinese consumers' luxury-brand consumption?*

With globalization of the economy, some recent researchers have noted the acculturation impact on consumers' behavior changes (Quester, Karunaratna and Chone, 2001; Darpy and Silhouette-Dercourt, 2008). More Chinese people than ever have now lived, studied or

¹ Including: jewelry, ready-to-wear, leather goods, perfumes, but excluding private planes and yachts.

² Economic Information & Agency, China's luxury consumption market heating up, 9 June 2008.

³ Economic Information & Agency, China's luxury consumption market heating up, 9 June 2008.

⁴ About €146, according to rate of change of Bank of China on 19 August 2008, 1 euro≈10.02 Yuan.

⁵ China National Bureau of Statistics, 2008.

⁶ World Wealth Report, april 2004, and KPMG, 2008.

worked in foreign countries. This leads to the fourth set of research questions: *Do overseas experiences influence Chinese consumers' attitudes and behaviors towards luxury-brand consumption? To what extent, do education levels affect their perception of luxury?*

The purpose of this study is to therefore better understand Chinese consumers' values and attitudes towards luxury-brand consumption, and to explore the possible factors that impact their purchase. This article reports the results of an exploratory study conducted in France and Germany with 15 Chinese consumers, and the re-analysis of seven existing interviews with Chinese consumers in mainland China carried out by Lu in 2002. Based on these analyses, we propose a possible segmentation of luxury brand consumers in China. We will also discuss the limitations of the study as well as proposals for future research.

1. CONCEPTUAL FRAMEWORK

1.1. The luxury concept

Luxury appears to be a rather complex concept and researchers tend to have difficulty explaining this notion in a few short sentences. In marketing, researchers tend to explore this concept from the perspectives of consumers. Dubois and Paternault (1995) emphasized the “dream effect” that luxury brands bring to consumers. Roux and Floch (1996) suggested two inseparable dimensions of luxury: ethical and aesthetic. Ethical represents the anti-economy character of luxury, while aesthetic refers to the poly-sensuality provided by luxury brands. According to the comparison of Vigneron and Johnson (2004), several common luxury dimensions can be found (Kapferer, 1998; Dubois, Laurent and Czellar, 2001). Based on a multi-cultural study that covered a very large geographic area, Dubois, Laurent and Czellar (2001) proposed a definition of luxury including six facets: 1-Excellent quality, 2-Very high price, 3-Scarcity and Uniqueness, 4-Aesthetics and Poly-sensuality, 5-Ancestral heritage and Personal history, and 6-Superfluosity. These six facets were often introduced in further cross cultural comparative studies (De Barnier, Rodina and Valette-Florence, 2000; Nyeck and Roux, 2003).

1.2. Related concepts and measurements of luxury consumption

Consumers' consumption motivations towards luxury goods are often explained as socially and conspicuously oriented. Veblen's “happy few” theory (1889/1899) suggests that people consume luxury goods for signaling their wealth to others; at the same time, luxury purchase is also made for the sake of enhancing one's status or social prestige, which is qualified as

status consumption (Eastman, Goldsmith and Flynn, 1999).

More recently, personally-oriented motivations towards luxury consumption have emerged. Several personal factors, such as consumers' search for hedonic pleasure (Vigneron and Johnson, 2004) and emotional experience (Vickers and Renan, 2003) encourage luxury goods consumption as well. Tsai (2005) empirically showed that the personal orientation trend of luxury-brand consumption, which follows the traditional social orientation dimension, is becoming an increasing international popular phenomenon.

According to past research, social and personal orientations are two major dimensions of luxury consumption. But which concepts and measurements correspond to these orientations?

From the social orientation perspective, conspicuous and status seeking both seem to be relevant concepts. These two concepts are very similar, O'Cass and McEwen (2004) pointed out that status consumption and conspicuous consumption are two distinct constructs⁷.

From the personal orientation perspective, Tsai (2005) states that self-directed pleasure, self-gift giving, internal self congruency and quality assurance are four types of personally oriented consumption. However, Tsai's final scale of self-directed pleasure seems too focused on emphasizing "self" (e.g. "I incline to concentrate consumption on my own pleasure instead of others...". Tsai, 2005, p. 442), and neglects the "pleasure" dimension. Since the concept of hedonism is relevant to the personal orientation of luxury consumption, the two hedonistic behavior items developed by Wang et. al. (2000) within the Chinese context effectively fill this gap.

In addition, congruency with the social self should also be taken into account. Consumers tend to search luxury products or brands matching with their social image and status (Sirgy, 1981); this intention seems to be associated with socially oriented luxury consumption.

Another concept considered as connected with luxury consumption is materialism (Wong and Ahuvia, 1998; Eastman, Goldsmith and Flynn, 1999). Based on Belk's (1985) personality traits, Richins and Dawson (1992) developed a three-component materialism measurement by viewing this concept as a value: acquisition centrality, acquisition as the pursuit of happiness and possession-defined success. The "success" component is related to social demonstration of luxury goods, the reason being that materialists believe that one's success can be shown to others by displaying luxury possessions (Wong and Ahuvia, 1998). Since "centrality" and "happiness" components reflect one's personal desire and happiness towards material possessions, we believe these are comparatively relevant to personal orientation of luxury

⁷ Status consumption emphasizes the acquisition of status products, while conspicuous consumption focuses more on the visual display of purchased products to others.

consumption.

To conclude, we propose an overall framework with the related concepts and measurements of luxury consumption (see figure 1).

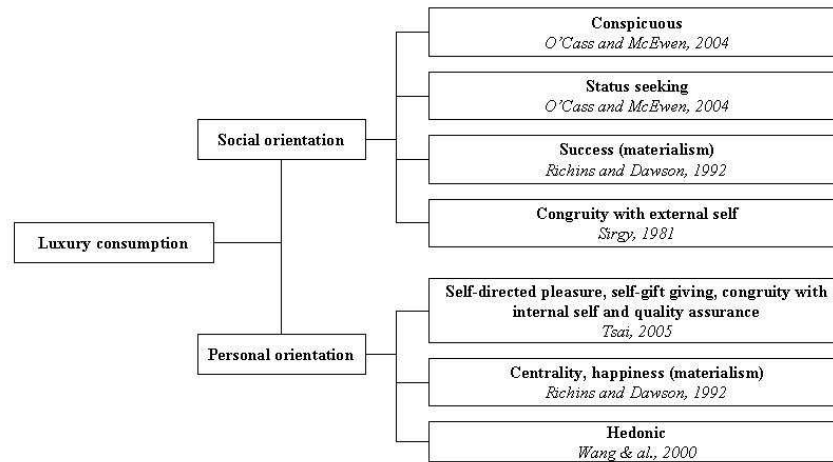


Figure 1 : Related concepts and measurements of luxury consumption

1.3. Luxury consumption in China

In China, as in most developing markets (Batra & al., 2000), foreign brands are usually regarded as being connected to status, prestige (Sklair, 1994; Zhou and Belk, 2004; Tsai, 2008) and an upscale image (Venkatraman and Nelson, 2008). People who are more westernized (Hsu and Nien, 2008), as well as the young generation (called “global materialists⁸”) in China (Hung, Gu and Yim, 2005) have a higher preference towards foreign brands. Young Chinese are also willing to pay a higher price for foreign brand clothing (Wang, Siu and Hui, 2004) mainly due to its “high status” (O’Cass and Choy, 2008). Consumers perceive higher value and more prestige in a foreign brand, only if it belongs to a conspicuous product category (Zhou and Wong, 2008). However, the notion “foreign” is too broad and too general to define luxury; therefore it is necessary to clarify the multifaceted definition of luxury in China which originates from consumers perceptions.

Regarding the influences of religions, Confucianism is the most dominant doctrine in Chinese society and is particularly associated with luxury consumption (Wong and Ahuvia, 1998). However, for the other Chinese traditional beliefs such as Buddhism, their connections with luxury consumption have been seldom studied.

In his doctoral research, Lu (2004/2005) showed that the Chinese elite class (rich and well

⁸ Chinese who are born in 1992 or thereafter.

educated people), that lives in mainland China, has ambivalent attitudes towards luxury goods consumption mainly due to the coexistence of traditional and modern values. However, the traditional and modern values generated in his study are not complete. Firstly, the modern values “modernity” and “youth” are not precise and perfectly related to the luxury concept. Secondly, some important dimensions such as congruency with social status are lacking when we compare them with the scale of Chinese traditional values proposed by Zhang and Jolibert (2003). Moreover, Chinese elites represent only one part of luxury consumers in China.

Based on the limitations of previous studies, our research design is developed as follow.

2. RESEARCH DESIGN

2.1. Methodology

Since the antecedents of luxury consumption behaviors of Chinese consumers and relevant measurements are still lacking, an explorative study is necessary.

Lu (2004) studied the Chinese elite in 2002 who were working and living in Chinese metropolises (Beijing, Shanghai). He found them to be typically young (age range: 25-40), middle to high income level (monthly income above 8,000 yuan), and educated (at least a Bachelor’s degree holder). Lu used the qualitative approach of semi-directive interviews. Since his seven interview transcriptions are accessible (Lu, 2005), we have used them as part of our study and conducted new interviews with 15 consumers of Chinese origin who presently live in France and Germany. We have also used an identical methodology – in-depth interviews - in order to facilitate a comparative analysis between two groups of consumers: sample 1, “in-China” consumers (Lu’s sample of 2002), versus sample 2 (our 2008 population), “out-of-China” consumers.

These respondents were selected by the “culture” and “income” criteria, which are regarded as the most determinant variables in luxury product consumption (Dubois and Duquesne, 1993). Hence, three groups of consumers were studied: -the rich and educated, -the rich and less educated, and -the less rich and educated (five participants in each group; rich: monthly income above € 8,000⁹; educated: at least bachelor degree holder). The participants are all aged 24-46 (seven are below 35 years old), roughly half male and half female (eight males), living in Europe, for at least two years (nine have been living in Europe for more than five years).

⁹ €8,000 is nearly 6 times more than the average level, which is €1,355 in France and €1,454 in Germany (Source: United Bank of Switzerland, 2007).

2.2. Interview structure and methodology

In the interviews, we began with several demographic questions to warm up, then explored respondents' general perceptions towards luxury. We then probed further into their latest and first luxury brand purchase experiences, allowing them to compare and contrasts comparison the two purchases. In the final part, we asked several questions on social ethics and moral standards in order to explore traditional consumption values as well as modern values.

Each interview lasted about one hour. All interviews were conducted in Chinese and recorded. The interview records were then transcribed into Chinese, followed by their translation into English.

There are two samples and two methods involved in the analysis. Firstly, we analyzed sample 2, which contains the 15 interviews we conducted in 2008. With thematic content analysis, we generated the major attitudinal dimensions, which were then quantified using lexical analysis¹⁰. Secondly, we combined sample 1 (Lu's sample of 2002) and sample 2 to conduct a comparative analysis.

3. RESULTS

3.1. Consumers' perceptions towards luxury

In our study, we refer to the six luxury dimensions proposed by Dubois, Laurent and Czellar (2001) to categorize our content of sample 2 (n=15). The definitive elements of luxury given by respondents include, for the most part, these six aspects. ***-Very high price (22%), -Excellent quality (18%), -Scarcity and Uniqueness (14%)*** gained relatively higher frequencies than *-Aesthetics and Poly-sensuality (11%), -Ancestral heritage and Personal history (10%), and -Superfluousness (9%)*.

A new dimension called "Famous brand" emerged with the third highest frequency (16%). Early in Lu (2004)'s study, brand awareness was already found as an important driver to luxury goods consumption in China. Chinese consumers seem to have particular preferences towards famous brands. They tend to choose those well-known brands which could be more easily recognized and admired by others. This phenomenon may reflect the interdependent tendency of their luxury consumption.

"...The brand should have its brand effect and should be widely known, very famous.

If nobody knows this brand, why should I choose it..." (Respondent 6)

At the subgroup level, respondents who have a higher education background regard luxury

¹⁰ Lexical analysis was performed with Sphinx Lexica.

with a more profound comprehension: a true luxury brand, in their opinion, should be fashionable, aesthetic, having a long history and ancestral heritage. These aspects were mentioned 12 times, contrary to less educated people who never mentioned them. It seems that consumers' educational capital might affect their attitudes towards luxury consumption.

3.2. Consumption values: traditional and modern

Two *Chinese traditional doctrines Confucianism and Buddhism, as well as modern values Independence and Hedonism* can be associated with luxury consumption in China (see table 1). This result is drawn from our 2008 sample (n=15).

Dimensions	Components	References	Example of verbatim
Buddhism	Unnecessary of luxury	Scale of traditional Chinese values (Jolibert, 2003)	"...Doing good deeds is the essence of religion, to show people a good direction, not much show off. Buddhists are not easy to be impacted (by luxury)..."(Respondent 5)
	Justice equity		"...The more I paid, the better I gained, to be practical in consumption..."(Respondent 1)
Confucianism	Interdependence		"...Confucianism tends to more care about one's social status, hence I think it will promote luxury consumption..."(Respondent 3)
	Modesty		"...Confucianism persuades people not go to extremes, sometimes be humble..."(Respondent 10)
Modern values	Independence	Scale of self-construal (Singelis, 1994)	"...Young people are less and less affected by the traditional values. They are more personalized, more different. They like to be more distinct from others..."(Respondent 5)
	Hedonic value	Scale of hedonic value (Wang & al., 2000)	"...Those born after 80's dare to spend money. The hedonic values are the most popular, they enjoy spending money..."(Respondent 6)

Table 1 : Chinese consumers' consumption values towards luxury products

Buddhism seems to have a negative impact on luxury consumption. The Buddhist concept of "Jie" requires people to control their desires towards material acquisition and encourages a simple life. Consequently, Buddhist values lead to a consumption preference towards utilitarian products (Zhang and Jolibert, 2003). However, in the present study people influenced by Buddhism can still find reasons to purchase luxury products.

"...I know a boy, he is Buddhist. When he asked me to buy a purse for him, I was surprised and felt this was unthinkable. But he said that Buddhism is speaking of reincarnation, it should be to enjoy. The wealth of this life is deserved from former life..." (Respondent 5)

“...I’m Buddhist. But I don’t think my religion has any influence on my luxury purchase...” (Respondent 4)

The component “justice equity” is also important. Several Chinese consumers still believe “*the more I pay, the better I gain*” formula, hence they tend to be concerned by the real benefits that luxury products bring them, such as good quality which makes them feel they have more value for their money.

“...I bought it (Ecco shoes) because I like that brand and felt it is worthy...Some products of brands that I like have good quality. So why not buy it?”(Respondent 8)

“...According to my experiences with this brand (Zegna), I think it is value for money, the quality is really good, and I am willing to pay more for it...”(Respondent 10)

Confucianism has dominated Chinese society for approximately 2,000 years. In marketing, Confucian tradition is particularly associated to the social demonstration of symbolic goods (Zhang and Jolibert, 2003; Wong and Ahuvia, 1998). In this study, Confucianism seems to reflect the interdependent tendency. Respondents stated that after moving to Europe some of their interdependent consumption behaviors which they had in China have gradually changed.

“...I’m now in the middle of western and eastern consumption values: I will not choose a very famous brand to let everybody know, but also one which could be recognized by others...”(Respondent 3)

“...Before, my dress should reflect my image and status immediately...Comparatively, now, I don’t show off in Germany. I pursued the most fashionable brands when I was in China, everything I did must be outstanding beyond the average...” (Respondent 8)

The modern values of Chinese consumers seem to be all opposite to traditional values: Independent vs. Interdependent, Hedonic value vs. Practical value. It is congruent with the previous findings – there are complex and ambivalent attitudes towards luxury consumption in consumers’ minds (Dubois, Laurent and Czellar, 2001; Lu, 2004).

3.3. Attitudinal dimensions and segmentation

Based on the content analysis of our 15 interviews, attitudinal dimensions “***Social orientation vs. Personal orientation***” and “***Independence vs. Interdependence***” were generated, which are the most relevant dimensions for segmenting the Chinese luxury market.

The first dimension “Social orientation vs. Personal orientation” is gained according to the conceptual framework established by the literature. The second dimension “Independence vs. Interdependence” has been used in many cross-cultural studies to compare western and

eastern cultural differences (Bond, 1988; Cheng and Schweitzer, 1996; Wong and Ahuvia, 1998; Lu, 2004; Cui et. al., 2008).

We then quantified these dimensions by selecting discriminating words significantly different from others¹¹, which yielded 41 chosen words. These words are either directly or indirectly associated with a particular dimension. For example, “social” and “status” are linked to social orientation, but “taste” is not directly connected unless consumers’ good taste on luxury could be admired by others. These words were then projected with respondent details onto a two-dimension coordinate plan (correspondence analysis based on lexicons). Four segments of luxury consumers emerged, with nearly 30% of explained variance (Axis 1: 15.39%, Axis 2: 13.87%, see figure 2).

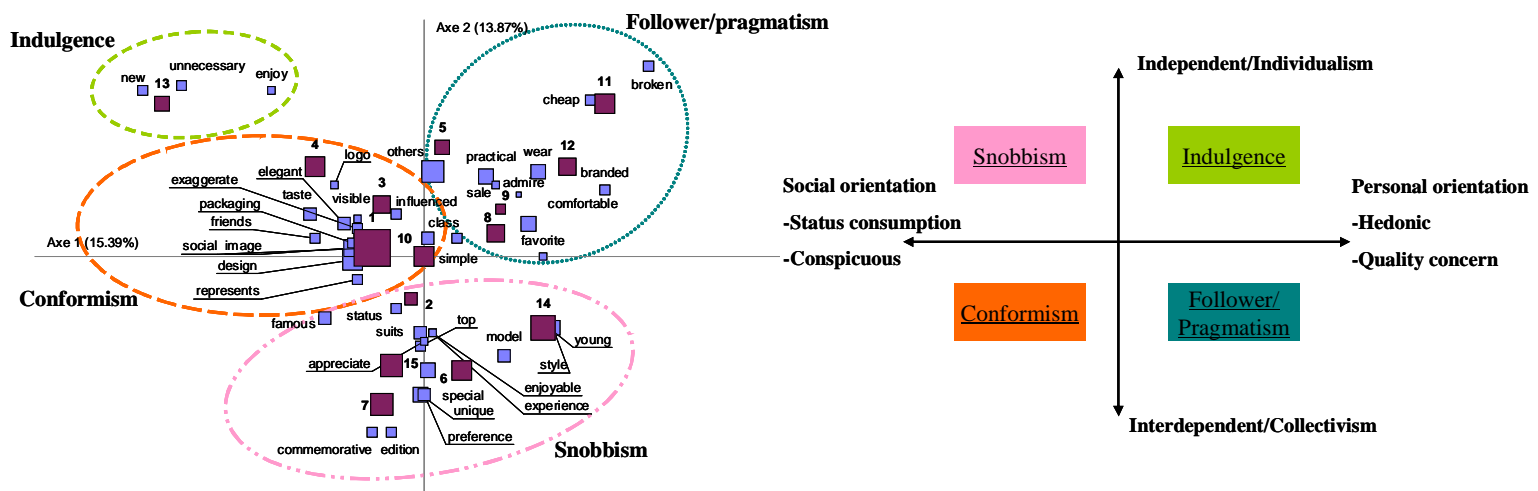


Figure 2 : The four segments of Chinese luxury-brand consumers and their relationships with the two attitudinal dimensions

These four consumer segments were termed “*Conformism*”, “*Snobbism*”, “*Indulgence*” and “*Follower/pragmatism*”. The consumers were labelled “*Conformism*” and “*Snobbism*” as their behaviors were congruent with the concept proposed by Corneo and Jeanne (1997). These consumers desire to affirm their social status by purchasing luxury products. However, the “*Conformism*” group might behave more independently, pursuing unique and rare products to accent their individual character (*Respondent 2, 6, 7, 14, and 15*). The “*Snobbism*” group appears more interdependent, needing to be recognized and verified interpersonally (*Respondent 1, 3, 4 and 10*). The “*Indulgence*” consumers seem drawn to seek new things and hedonism, even feeling “*unnecessary to show success by famous brands*”

¹¹ We compared the frequency of words by groups and by individuals, checked the significance value of Chi square. We filtered the words which have ambiguous meaning.

(Respondent 13), since they are more concerned with personal enjoyment in luxury consumption. The “Followers/pragmatists” (Respondent 6, 8, 9, 11 and 12) might be more easily influenced by others and tend to purchase luxury goods for their excellent quality.

3.4. Comparison: in-China vs. out-of-China

Since our interview protocol is different from that of Lu (2002), we can only compare the similar parts of those two samples (Lu’s sample and our sample), namely: “consumers’ perceptions towards luxury” and “general purchase behavior”.

According to content analysis, -Very high price (33%), -Excellent quality (17%) and -Famous brand (17%) are still the most frequently mentioned luxury elements in Lu’s sample. However, when compared with our sample 2, Scarcity and Uniqueness seems much less important for respondents of sample 1 than for those of sample 2 (0% vs. 14%).

To further understand the consumer tendencies, we combined our sample with that of Lu (2002), and performed lexical analysis (n=22) on the total population. The four segments emerged again with 23.79% of totally explained variance (see figure 3).

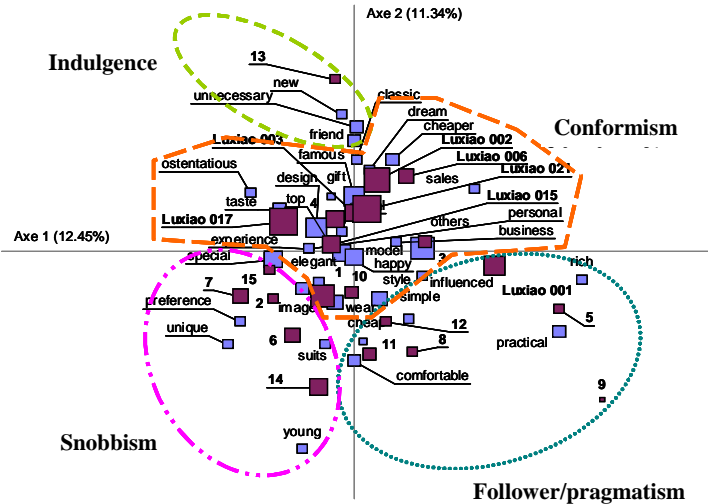


Figure 3 : Comparison of emerging segments between the two samples- Lu’s sample of 2002 and our sample of 2008¹²

These results suggest that respondents of sample 1 (Lu’s sample) fell within the “Conformism” and “Follower/pragmatism” segments, with no respondent classified into the “Indulgence” and “Snobbism” segments. In other words, sample 1 respondents were all

¹² We kept respondents’ ID number of Lu’s sample, and added “Luxiao” in front of the number to distinguish them from our sample 2.

located far from the “Independent/Individualism” side.

As mentioned earlier, for sample 1 respondents, the Scarcity and Uniqueness facet of luxury does not appear so important. This suggests that these consumers are unlikely to pay attention to rare luxury products, since they don’t like to be different from others.

In general, both findings indicate that consumers living in mainland China seem less independent in luxury goods consumption than those who live abroad. Therefore, consumers’ overseas experiences may influence their attitudes towards luxury-brand consumption.

4. DISCUSSION, LIMITATIONS AND FUTURE RESEARCH

In this research, we have combined two samples to gain a comparative perspective in geographic dimension. We quantified the qualitative text which was originally in the Chinese language. However, our total sample size is still relatively small. Future research should increase the number of interviews to verify our findings and to further investigate the perceptual differences in specific culture and geographic locations.

Attitudinal dimensions “Social orientation vs. Personal orientation” and “Independence vs. Interdependence” were generated out of the model. Four segments of Chinese luxury consumers emerged and the factors which might influence consumers’ attitudes were also identified. Finally, relevant propositions are formulated.

A respondent’s value system may determine one’s attitudes, hence it could also be used as a basis for marketing segmentation (Kamakura and Novak, 1992). In today’s Chinese society, the coexisting traditional and modern values should lead to different attitudinal tendency towards luxury-brand consumption. Confucianism may be linked to social orientation of luxury-brand consumption and the interdependent self-construal since even practical consumers could consider the good quality of luxury products as a reason of buying. Buddhism may lead to personal orientation of luxury-brand consumption, and as new modern values they may evoke personally and individually oriented consumption trends towards luxury products.

Immigrated groups would demonstrate specific consumption behaviors (Quester, Karunaratna and Chone, 2001; Darpy and Silhouette-Dercourt, 2008). In our study, Chinese consumers who live in Europe seem to be affected by western consumption values. Overseas experiences, more specifically the length and the type (study or work in foreign countries) of these experiences, may influence consumers’ attitudes towards luxury-brand consumption.

Consumers' economic and cultural capitals were identified as important influencing factors of luxury consumption in both marketing (Dubois and Duquesne, 1993) and sociology (Veblen, 1989/1899; Bourdieu, 1984). In our study, the different perceptions towards luxury were found among groups with different educational background.

Consequently, different attitudes should predict different purchasing decisions and selection preferences towards luxury goods. "Indulgence" consumers seem more interested in seeking novel things; the "Conformism" group tends to purchase products because others buy them (Corneo and Jeanne, 1997) as the quantity of luxury possessions might be an evidence of their social status; the "snobbism" group would like to be different from others (Corneo and Jeanne, 1997), and hence a rare and unique product might satisfy them; the "followers/pragmatists" appear more concerned about the luxury product quality.

These propositions are developed on the basis of this exploratory study. Future research will be focused on a quantitative study with a larger sample size to further investigate this phenomenon.

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