

中英双语
Bilingual Version

China Luxury *Report*

中国奢侈品报告

主编：赵忠秀 周婷 姚士锋

ZhongXiu ZHAO / Tina ZHOU / Steven YAO

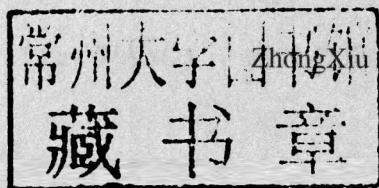


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2011 China Luxury Report

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序

奢侈品在中国的发展既是经济高速增长的结果,也是一种鲜明的社会文化现象。过去的三十年是奢侈品及品牌在中国市场空前蓬勃、迅速发展的三十年,从早期的皮尔·卡丹独领风骚,到后来的路易·威登声名赫赫,再到今天各大奢侈品牌的百花齐放,中国奢侈品市场品尝过高端消费萌芽成长时的勃勃生机,也享受过奢侈品牌狂热追逐下的兴奋喧闹。而今天,当多年累积需求相继得以释放之后,2011 这新十年的开启标志着中国奢侈品消费从狂热到理性、中国奢侈品行业从坐地起价到白热化竞争的深刻转型。

在这样一个关键的转型期,作为中国奢侈品市场及行业研究的先行者,对外经济贸易大学祥祺奢侈品研究中心联合国际奢侈品协会与《财富品质》,共同组建强大的专家研究团队,在八个月的时间内,走访中国各大主要奢侈品行业聚集地,深度采访了 2000 余名中国高端奢侈品消费者、数百名在华奢侈品牌负责人及中国高端媒体和广告公司,倾力推出《中国奢侈品报告(2011)》。

在广泛汇集来自消费市场、品牌商及高端媒体人的大量观点与不同声音的基础上,应用严谨科学的研究方法和工具,《中国奢侈品报告(2011)》从多维视角对中国奢侈品行业的发展历程进行深刻剖析,对目前中国奢侈品行业所处历史阶段进行全面解读,并为未来中国奢侈

品行业的发展之路提出建设性建议与意见。报告调查覆盖范围之广,访谈对象数量之众,分析方法之全面,在中国乃至全球奢侈品行业研究中实属罕见。

令人欣喜的是,《中国奢侈品报告(2011)》一经于“2011 奢侈品在中国”盛典上发布,立即得到来自中外各方专业人士的首肯。众多在华奢侈品牌运营商及高端媒体人纷纷表示此份报告对其在华的经营管理具有非常实际的指导作用,同时,不少来自国内外的专注于奢侈品行业研究的咨询公司也纷纷发来邮件征询获得报告完整版的方式与途径。

为拨开中国奢侈品行业的重重迷雾,满足中国奢侈品行业从业者的实际管理需求,引导中国奢侈品消费的理性健康发展,在中国经济出版社的鼎力协助下,《中国奢侈品报告(2011)》中英文版得以出版成书,作为总编之一,我深感荣幸。

在此我要感谢《中国奢侈品报告(2011)》整个研究团队,没有大家数月来的拼搏努力就没有今天此份报告所获的各种殊荣。同时我也要对所有为中国奢侈品行业作出过贡献的各方人士道声感谢,是你们的辛勤耕耘让奢侈品行业在中国这片丰厚的土壤上得以茁壮成长,万语千言汇成一句感谢!

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赵忠秀



姚士锋 财富品质创始人
《财富品质》总出版人、总编辑

1 中国奢侈品报告——用事实说话

我们很高兴能给大家带来国内首份中国奢侈品报告,为了这本书,我们前后工作了一年时间,面访和电话访问了超过 2000 名企业家、奢侈品品牌负责人和媒体人,力图用最实在的数据向大家展现奢侈品在中国发展的真实情况。

通过调研,我们看到了一个欣欣向荣并继续在高速发展的中国奢侈品市场;通过调研,我们一定程度感受到了中国奢侈品品牌的希望和未来;通过调研,我们真切感受到了国际奢侈品品牌的成功之道……这一切让我们的付出变得值得,而本书的出版也是我们分享的过程,我们愿意并喜欢这样的分享。

“嫌贫爱富”是奢侈品行业的行为准则,但是,这个准则正受到挑战。当越来越多的富豪将奢侈品消费由品牌忠诚转向个性化定制的时候,数量庞大的一般的高资产人群正成为所有奢侈品品牌竞争的重点。而且,越来越多的品牌开始重视潜在客户和小客户的培养,为自

己的将来作准备。

二三线城市正成为奢侈品硝烟弥漫的战场。一线城市做品牌、二三线城市做销量已经成为很多品牌认可的不争事实,但二三线城市的市场推广和销售资源的缺乏也正成为所有品牌面临的最大障碍,最主要表现在真正关注二三线城市高端消费群体的媒体少,真正有档次、有规格适合奢侈品品牌开店的商铺少这两方面。

关于电商和二手奢侈品是我们这次调研的一个重点。当电商报告出来后我们发现,其实消费者认为电商的最大价值是便利,而不是低价。按照这一点,目前主打低价牌的所有电商们都应该仔细思考一下了——看看自己是否重视品牌和服务,而不是单纯低价。关于电商的第二个结论是——假货会毁了整个电商市场,目前假货是消费者对电商的最大顾虑,而事实上,做假货的商家确实很多。

本次调查有一些结果让我们很振奋,我们振奋的原因是这些结果和我们常规的认识有很大差距。比如,我们发现越有钱的消费者越不重视品牌;一线城市其实比二三线城市更是二手奢侈品的优质市场;很多中国品牌在消费者心目中已经是奢侈品品牌等,不胜枚举。

当然,通过调研,我们也发现了很多不和谐的地方,这些可能是中国奢侈品市场将来发展的障碍。报告里已有详细的描述,在这里我只谈一点——假冒洋品牌是中国奢侈品市场面临的一个重要问题。当然,这源于中国消费者的盲目的崇洋媚外,对于这一点我是很不喜欢的,因为我觉得这对“洋品牌”是伤害,对中国品牌是侮辱,我希望行业有识之士共同抵制。同时,请允许我对坚持做中国自己的奢侈品品牌的企业家们表示敬意。

我们相信,《中国奢侈品报告(2011)》将是中国奢侈品市场从业人员和企业家的必读书。《财富品质》杂志很高兴和大家一起分享这一切。



周婷博士 对外经济贸易大学
祥祺奢侈品研究中心执行主任、
《财富品质》首席奢侈品研究员

2 有价值的信息，由有价值的人沉淀

提笔的时候，我们的《中国奢侈品报告(2011)》刚刚尘埃落定。作为一名学者，为中国、为所有在这个市场中奋斗的人呈现出这份解读，我走过了痛苦、反思、兴奋到冷静这样一个漫长的历程。

在这个历程中，令我倍感温暖的是，我并不孤独，《财富品质》给予了我们的研究团队最大的支撑与信心，用他们的资源与平台，连接了学术与市场，让我们深入地碰触到“神秘”的中国高资产人群；我们的报告还得到了中国媒体界精英的集体关怀，他们给予了一种难得的开放心态，一起搭建了“奢侈品在中国”这样一个有价值、有深度的平台；更可贵的是，中国奢侈品市场的操盘手们也为我们的研究贡献了他们的智慧与思想，共同分享他们步入中国二十年的荣辱成败。

中国是个有价值的市场，究竟能不能价值最大化，要看操作的人的价值。最初着手《中国奢侈品报告(2011)》的可行性研究时，我们的团队争论过，是继续探讨这块蛋糕的大小，还是深度品味它的品质与价值？答案是毋庸置疑的，蛋糕是大的，品质要好才对。品质的高低是所有的利益攸关者共同创作与操盘的结果。中国奢侈品市场已经自发地走过了二十年，2011年之后的市场将走向何方？谁能坚持走下

去? 市场的兴奋点在哪里? 政府需要抓手, 品牌需要依据, 消费者需要引导, 最关键的是谁能提供市场发展所需要的有价值的信息。作为中国奢侈品市场的研究者, 我们责无旁贷承担重任。

无数份问卷, 无数通电话, 无数次面访, 这个市场中的重重迷雾被一层层拨开, 我们的研究团队经常会惊喜地高呼, 原来这就是原因! 我们找到了中国经济发展与市场发展的脉络, 在众多貌似离散的信息与现象中间实证出了市场规律与未来的发展走势: 炫耀性消费的阶段我们在慢慢走过, 品味与品质的升级是中国企业家集体的期盼, 现金流的紧缺却使他们不得不去重新寻找资金的出口, 因此而点燃了艺术品市场与奢侈品二手市场的火爆, 奢侈品电商市场与免税市场也杀出了另外的市场通路。

国际奢侈品牌的中国发展之路似乎势如破竹, 但内部竞争却日益加剧。中国地区发展的不平衡性与中国未来经济的不确定性让他们的管理层突然冷静, 观望的情绪在弥漫。他们在中国掘金的同时, 一股声音也悄然出现, 在中国, 你们能不能承担起与品牌声誉相匹配的社会责任, 反哺给予你们力量的中国?! 曾经助力他们开拓中国市场的中国媒体圈也放慢了脚步, 新兴消费群体的出现带来新兴的媒体力量, 无论是新媒体的应用, 还是个人意见领袖的出现。未来的一年, 乐观与谨慎并行、增长与转变同步, 是中国奢侈品市场发展的关键词。

我们禁不住问, 中国品牌的未来通路在哪里? 消费者的悲观与媒体的期盼, 让我们心情沉重。能否再现昨日丝绸之路的辉煌, 能否唤醒中国流传千年的绝妙工艺, 能否涌现乔布斯般的中国企业家精神, 能否文化先行带来品牌的国际化? 我们具备了土壤, 需要的是阳光雨露。

当我们的研究报告把对中国奢侈品市场的解读推进到这一步时, 所有的研究员反而集体沉默了, 这是个需要可持续研究的市场, 需要更深层次的探讨与分析。无论怎样, 心态至关重要, 一样需要“坚持, 坚守与煎熬”。有人的理性, 才有价值的沉淀。

1 China Luxury Report 2011—Let the Facts Speak

We are pleased to present *China Luxury Report (2011)*, the first luxury report in China. We have been working for one year on this report, making visits or phone calls on over 2000 renowned entrepreneurs, luxury brands directors and media. It is upon all these facts collected through our solid work that we feel opportune to share our views.

Through this survey, we see a prosperous luxury market in China which keeps its growth at a fast speed. By this survey, we truly find something we can capitalize from the merits of those successful international luxury brands. All these efforts are worthwhile as we find the issue of this report an enjoyable experience to share.

Favoring with the wealthy is one guiding rule in the luxury industry, which is, however, in face of challenge when rich people are going more for individualization over brand loyalty and a vast group of high-asset people are coming up as a whole end for luxury competition. Furthermore, there are growing number of brands who have started out to expand the potential market with small customers for their future.

With those second and third-tier cities coming into being as the battleground for luxury, it is universally recognized that these battlegrounds are the goals to score for greater sales while those first-tier cities are the base camp for building brand status. Nevertheless, marketing resources are scarce in the battleground due to the facts that few media are willing to place a favor there and there are few retailers qualified for the standards in running such sales. And this is what holds all luxury brands back for nowhere.

E-commerce and refurbished luxury products are among the priorities

in this survey. We have learned from the e-commerce report that clients prefer this way of buying mostly for the convenience in it rather than low prices, which is worth consideration for all those e-commerce shops who sell with low prices—for them reputation and service are more to weigh up. Another finding on e-commerce is the problem of counterfeit; customers hesitate to buy for fear of counterfeits and, unfortunately, discredited sellers are numerous indeed.

Some findings from this survey are really exciting since they are quite contradictory to what we used to think. For instance, wealthier customers care less about brand; first-tier cities are better market for refurbished luxury products against those second and third tier cities; and not a few domestic brands are already luxury in customers' point of view. And such findings are many to tell.

Certainly, dissonance also looms large somewhere in the market, which could be quite disturbing for the future. Among all that much to account in this report, I only point out one thing here—the problem of fake products after international brands prevails in the luxury market in China. This could be attributable to a blind faith in imported goods among domestic consumers, on which I should express deep discontent. Fake products bring damage to real foreign brands and make an insult to domestic brands as well. I would appreciate all those who despise such practice. And I also feel obliged to show my respect to those Chinese entrepreneurs building their own brands.

As I believe, this report, with many other facts laid out within, should be an indispensable reference for those who work in this industry, both employees and employers.

Steven YAO

2 Valuable Information Depends on Valuable Stakeholders

China Luxury Report (2011) has just accomplished when I begin to write this acknowledgement. As a scholar, I have gone through the mixture of anxiety, reflection, excitement and calmness for the fulfillment of this in-depth report which aims to extend a sophisticated understanding for Chinese luxury market. During this process, *Fortune Character* has granted great support and confidence to our research team with their rich market resources, which enables us to approach the renowned Chinese high-asset groups in a deep manner, and all that makes me feel warm and not being standalone. Furthermore, the media has also rendered significant help to our report, opening their hearts and building a valuable and profound platform with industry-wide efforts. What's more, these management of international luxury brands in Chinese luxury market have contributed their wisdom and ideas to our research, sharing their loss and gain during the 20-year operation in China.

China is a market of significant value, and whether it can be maximized or not depends on the value of the operators. At the very beginning, in the feasibility study of our report, we have an argument on the issue, namely, to discuss the scale of the cake or to deeply taste its quality and value. There is no doubt that the cake is big and the quality should be also superior.

Chinese luxury market has spontaneously developed 20 years. What is its direction after 2011? Who will stick to go? Where is the potential? Government needs breakthrough, brands need basis and consumers need guidance. The crux of the matter will be who would provide useful information for the further development of the market. As the researchers of Chinese luxury market, we should take the indispensable responsibility.

Massive information of this market has been uncovered through a great

number of questionnaires, telephone calls and interviews, and we acclaim for all the underlying facts that we have discovered. We have dig out the developing path of Chinese economy and market, and demonstrated the rules and principals of market and developing trends for the future from the seemingly unrelated information. Chinese consumers have gradually passed through the phase of conspicuous consumption and upgrade of taste and quality has been the wish for entire group of Chinese entrepreneurs. However, tightening cash flow forces them to find new access to capital, whereby leading to the prosperity of art market and second-hand luxury market, meanwhile luxury e-commerce market and duty-free market also gain the popularity.

The international luxury brands have achieved great success but the internal competition is also increasingly intensified. Moreover, imbalance of China's development among different areas and uncertainty of China's development in future have made top managers calm and wait. When the top brands make money in China, many people doubt that if these brands can take the responsibility accordingly and further make contributions to China in return. The Chinese media also slow down the pace and emerging consumers have poured new momentum into the industry such as the application of new media and individual media. In the following years, the key words for China luxury market will be the coexistences of optimism and caution along with growth and transformation. Where is the road leading to future for the Chinese brands? We feel sort of anxiety for the pessimism of consumers and expectations from media. Is it possible to relive the glory of the Silk Road, recall the Chinese ingenious craftsmanship inherited from long history, and nurture great Chinese entrepreneurship like Steve Jobs as well as internationalize the brand resulted from spreading culture? We have certain foundation and urgent need for cultivation.

When we have a general grasp of our report, all the team, on the other hand, seem quite reticent. This is a sustainable market, and it needs profound discussion and analysis in the following years. We have a long way to go. No matter what the reality is, mentality plays a key role. We choose to persevere in the way. Accumulation of value stems from rationality of human beings.

Tina ZHOU

CONTENT | 目录

2011 年中国奢侈品报告概述

我们的研究方法 / 4

我们的初衷 / 5

我们的发现 / 6

我们面临的问题 / 24

我们的深度思考 / 30

第一篇 | 增长 • 转变 • 多样化 成长中的中国奢侈品消费观

调研对象特征 / 36

消费目的多样化 / 39

奢侈品自用消费的面子消费、社交消费与个性消费 / 40

商务馈赠 VS 收藏及投资的选择差异 / 42

高端媒体人眼中的中国奢侈品消费目的 / 44

消费决策组合化 / 47

启示 / 55

第二篇 | 二手 • 免税 • 电子商务 中国奢侈品销售的市场新通路

中国二手奢侈品交易市场 / 59

中国奢侈品免税交易市场 / 70

中国奢侈品电子商务交易市场 / 81

启示 / 97

第三篇 | 网络 • 互动 • 个人媒体 媒体助力奢侈品牌在华推广

奢侈品牌在华媒体推广现状 / 101

媒体助力奢侈品牌在华推广 / 103

中国消费者奢侈品信息获取渠道及媒介选择特点 / 106

2012 年奢侈品牌在华媒体投放预算增加 / 114

启示 / 116

第四篇 | 沟通 • 转型 • 客户维护 奢侈品牌的自我提升与品牌表现力

调研对象: 137 位国际奢侈品牌负责人 / 119

在华奢侈品牌的基本特征 / 120

奢侈品牌在华成功经营的主要优势 / 125

奢侈品牌在华的客户关系管理 / 128

奢侈品牌在华经营面临的九大压力 / 132

启示 / 140

第五篇 | 绿色 • 责任 • 可持续发展
国际奢侈品牌的“绿色革命”与中国绿色足迹

奢侈品牌绿色战略选择的推动力 / 144

奢侈品牌“洗绿革命”的六大驱动力 / 145

奢侈品牌的中国绿色足迹与绿色表现力 / 150

启示 / 164

第六篇 | 机遇 • 传承 • 创新
中国奢侈品牌的国际化道路任重道远

本土奢侈品消费者普遍悲观：中国本土不可能产生国际奢侈品牌 / 167

媒体眼中仍存希望：庞大的市场消费基础是中国本土产生国际奢侈品牌的最有利条件 / 168

高端白酒、高级成衣、香烟、茶叶、瓷器以及珠宝是最有潜质产生中国本土奢侈品牌的领域 / 171

启示 / 174

附录