

对外经济贸易大学中国奢侈品研究中心
对外经济贸易大学中国消费经济研究院



中国奢侈品消费者 行为报告2015

——新常态下的中国奢侈品市场发展

洪俊杰 张梦霞 著
Junjie Hong; Mengxia Zhang

China's Luxury Goods Consumer
Behavior Report 2015

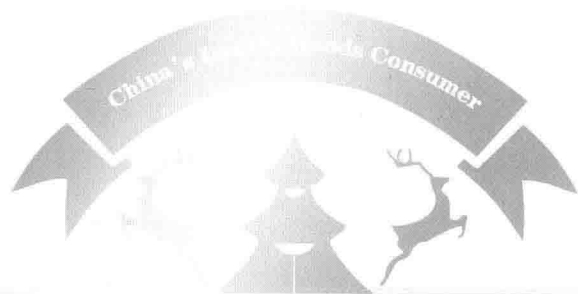


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编写说明及致谢

《中国奢侈品消费者行为报告 2015》(以下简称《报告》)的主要目的是揭示 2015 年中国奢侈品消费市场的现状、特点和未来走势。首先,基于 2014 年中国奢侈品市场状况,在奢侈品消费市场发展的宏观经济分析的基础上,分析了奢侈品行业发展情况以及中国消费者奢侈品消费行为特征。其次,选择中国六个主要城市即北京、上海、深圳、广州、成都、苏州进行抽样调查,获得有效样本 3347 个,采用社会科学统计分析方法进行数据分析,深入探索了中国奢侈品消费者购买决策因素的一般性和特殊性,并基于人口统计特征变量的作用,对奢侈品目标消费者行为进行差异性研究。再次,基于中国传统文化价值观导向变量划分中国奢侈品消费族群,探索奢侈品消费族群差异形成的文化价值观归因。此外,我们将 2015 年和 2014 年的奢侈品消费者的行为指标进行了对比研究,总结其趋势性变化。接着,为了探索“新常态下的奢侈品市场发展”和“奢侈品行业与互联网科技的关系”,我们设计并实施焦点小组访谈和深度专家访谈等调研,并在此基础上进行定性研究。最后,报告给出基于整体调研结论的中国奢侈品消费市场未来走势的判断和预测。

在对外经济贸易大学中国消费经济研究院的支持下,对外经济贸易大学中国奢侈品消费行为研究团队承担了 2015 年报告的研究工



作。《报告》的作者是对外经济贸易大学洪俊杰教授、张梦霞教授。特别鸣谢往期《报告》的作者、对外经济贸易大学赵忠秀教授和朱明侠教授等前期为《报告》做出的基础性贡献。首都经济贸易大学工商管理学院陈静同学主要参加了调研数据的整理与统计分析工作，对外经济贸易大学国际经贸学院常辉、刘胜男、邵芊涵、陈姝霖同学主要参加了资料的收集与整理工作，邵芊涵同学和她的翻译小组负责《报告》的英文翻译工作，作者对上述研究员的辛勤劳动表示衷心感谢。与此同时，作者非常感谢张志伦先生在问卷调查中给予的积极帮助以及王菲、付瑜、谢春晨、郭颖、夏阳、张腾飞、王琼和Gordan Yang对《报告》的帮助。最后，非常感谢对外经济贸易大学中国奢侈品研究中心潘晓等同事的大力支持。

《报告》的主要读者是关注和研究中国奢侈品消费市场和中国消费者奢侈品购买行为的国际顶级奢侈品行业的高级经理人或投资人，奢侈品牌研究领域的专家、学者，以及关注该领域发展态势的各界人士。

《报告》的独特贡献和价值在于，研究团队是一支长期致力于奢侈品领域研究的专家学者队伍，课题立项通过严格审批，实施专项调研，采用科学抽样技术和统计分析，严格遵守科研规范，保持中立立场，从而保证了数据、结论和预测的客观性、真实性和科学性，以期最大限度地反映奢侈品市场的本质和客观规律。当然，《报告》一定会存在不足之处，作者期待各界同仁、读者给予批评指正，力争使中国奢侈品消费者行为年度报告越做越好。

对外经济贸易大学中国奢侈品研究中心

对外经济贸易大学中国消费经济研究院

2015年12月



| Acknowledgement

The main purpose of the *China's Luxury Goods Consumer Behavior Report 2015* (referred to as Report) is to reveal the current status, characteristics and development trend of luxury goods consumer behavior in China. First, on the basis of the Chinese luxury goods market in 2014 and macroeconomic analysis on the development of luxuries market, we analyze the industry development state of luxuries market and the characteristics of consumer behavior. Second, selecting 6 major Chinese cities—Beijing, Shanghai, Shenzhen, Guangzhou, Chengdu, Suzhou and collecting 3347 valid samples in total, we adopt statistical analysis to further study the universality and specificity of main factors affecting China's luxuries consumer decision. We conduct an otherness study on the consuming behavior of target consumers based on the function of demographic characteristic variables. Third, we use the cultural value variables to classify the luxuries consumers and explore the formation of cultural values and attribution on differences in various consumer groups. Moreover, we do a comparison study on indicators of luxury goods consumers' behaviors of the year of 2014 and 2015. Then, we design and carry on qualitative research like interviews of focus groups and depth expert interviews to ex-



plore the development of luxuries market in the New Normal and the relationship between luxuries industry and internet technology. Finally, on the basis of the above research, we predict the trend of the Chinese luxuries market in the future.

Under the support of Institute of Chinese Consumer Economics of UIBE, the team of luxury goods research center undertakes this study of 2015' report. The editors of this report are Professor Wang Junjie and Professor Zhang Mengxia from UIBE. Special thanks to Professor Zhao Zhongxiu and Professor Zhu Mingxia who are past editors and have made basic contribution to the report. Chen Jing from the Capital University of Economics and Business mainly participates in the works of collating data and statistical analysis. Chang Hui, Liu Shengnan, Shao Qianhan and Chen Shulin take part in the works of collecting data and arranging information. Shao Qianhan and her team are responsible for the translation of this report. We would like to extend our deepest appreciation to all the member for their hard work. In addition, editors give their sincere thanks to Mr. Zhang Zhilun who helps us in the process of investigation and also give thanks to the help of Wang Fei, Fu Yu, Xie Chunchen, Guo Ying, Xia Yang, Zhang Tengfei, Wang Qiong and Gordan Yang. Finally, we express our sincere thanks to workers in luxury goods research center of UIBE.

The main readers of this report are senior managers or investors, experts of luxuries industry and people from all walks of life who are research and focus on Chinese luxury market and shopping action of Chinese luxuries consuming.

The research team is organized by experts and scholars who are study luxury goods for long time. The specific contribution and value of



this report lie in objectivity, veracity and scientificity of data, results and prediction because of strict examination, scientific sampling technique and statistical analysis, severe research norms and neutral standpoint, which reflect the essences and objective law of luxuries market to the largest extend. Meanwhile, we look forward to readers' suggestions and comments.

The China Research Center for Luxury Goods and Services
The China Research Institute of Consumer Economics
University of International Business and Economics
December, 2015



| 前 言

2014 年是全球奢侈品业动荡、新奇、复杂和充满不确定性的一年。中国内地奢侈品市场在结束了 2008~2012 年持续两位数的市场高速增长后，增长速度开始减缓，2013 年增长速度下降至 2%，2014 年再下降 1 个百分点。我们看到，在全球范围内一些像香奈儿、古驰等一线奢侈品品牌的经典产品开始大幅降价销售。面对品牌实体店销售的普遍缩水，众多奢侈品品牌商已经或正在或将要试水电子商务，采用实体销售与电子商务相结合的全渠道分销模式。互联网和林林总总且层出不穷的新媒体为整合营销沟通提供了前所未有的信息传播与互动平台，在一些奢侈品大品牌那里出现了一种叫作首席数据官的崭新高管职位，LVMH 集团 2015 年 9 月已经宣布在公司内部设置该职位，标志着公司数字业务的全面开启。此外，奢侈品电商平台 NET-A-PORTER 和 YOOX 的合并标志着奢侈品业从竞争走向竞合的新趋势，互联网正在改变着传统奢侈品业的运营模式。在这样一个新常态环境背景下，本书面对全球奢侈品业的困境、挑战和新形势，追踪中国奢侈品消费者行为现状和变化特征，探讨奢侈品业的发展态势和机遇，力争为中国高端品牌走向世界和全球奢侈品业的健康发展提供市场依据，做出科学预测。

我们认为，行业的发展基于企业的发展，企业的发展以消费者



需求为基石，认识消费者行为源于对其决策行为的深刻理解。

《报告》发现，新常态下的中国奢侈品市场充满了机遇与挑战，突出表现在以下方面。

第一，奢侈品牌市场调整期仍将持续，调整性过渡将是一个连续的、相对较长的过程，度过目前这个阶段，奢侈品市场将会复苏并进入健康发展的新阶段。

第二，经典和创新并进是奢侈品市场可持续盈利的保障。我们发现，中国奢侈品消费市场是一个三元市场结构：保守型市场、先锋型市场和观望型市场，保守型市场仍然是主流市场。我们预测，未来中国奢侈品消费市场的态势是：高端定制市场蓬勃发展，小众定制市场稳步发展，规模定制市场中长期有望稳步回升。

第三，奢侈品行业的全渠道模式不断完善，且中国奢侈品消费者的优选渠道顺序依次是专卖店、出境游购物、名品折购店、代购、海淘和境内网购。奢侈品的全渠道零售模式逐渐显现，目前中国乃至全球的奢侈品业在全渠道模式方面的实践仍然处于探索阶段，这是奢侈品品牌商面临的新的市场机遇和挑战，或新的市场增长点。

第四，奢侈品理性消费行为下的个性化消费趋势明显。我们发现，中国奢侈品消费者正在逐渐从简单的模仿和炫耀行为向个性化和自我认同的消费行为转变。

第五，中国奢侈品消费者行为有文化价值观导向下的潜在市场集群特征，尤其是来自儒家文化价值观和道家文化价值观的影响显著，显然该结论是认识中国奢侈品消费者有别于西方消费者奢侈品消费行为的最根本的驱动因素。

总之，未来的奢侈品市场的整体发展是大趋势，科技创新驱动的奢侈品市场发展将是未来该市场发展的方向。奢侈品消费不同于奢侈浪费，奢侈品牌消费更要注重其品质与文化内涵，消费者购买奢侈品牌产品体现的是人类对美好生活的追求。以往发生在中国市



场的奢侈品牌价格歧视现象需要得到调整，奢侈品牌商需要考虑中国市场战略与全球市场战略的一致性和平衡性。面对中国经济的新常态，奢侈品牌商要在适应中国市场大环境和中国消费者奢侈品消费需求特点的前提下谋求可持续发展。



| Preface

For global luxury industries, 2014 is a year of unrest, newness, complexity and uncertainty. The continuous rapid growth of over 9% of luxury market in Chinese mainland from 2008 to 2012 has gone and the growth speed has slowed down. The growth speed of 2013 was reduced to 2%, while that of 2014 was 1%. We can see that the classic products of Chanel, Gucci and other global top luxury brands have been sold with big price cuts. Many luxury brands are trying to adopt e-commerce in face of the decrease in sales of physical stores and they are going to adopt the full channel distribution model with physical sales combined with e-commerce. Internet and numerous new media provide the unprecedented information communication and interactive platform for integrated marketing communication. The new supervisory position of Chief Data Officer appears in some large luxury brands and the LVMH Group announced that it set this position in September of 2015. The appearance of Chief Data Officer marks the beginning of digital service of companies. Besides, the merger of two e-commerce platforms, NET-A-PORTER and YOOX, marks the new trend from competition to competition and cooperation; internet is changing the operating model of traditional luxury industries. Un-



der the "New Normal" situation, this investigation traces the status and change features of Chinese luxury consumers' behaviors in face of the dilemma, challenge and new situation for global luxury industries to investigate the development trend and opportunities of the luxury industries so as to provide market basis as well as scientific prediction for the development of Chinese high-end brands on the world stage and healthy development of the global luxury industries.

We think that the development of the industry is based on the development of the enterprise, while the development of the enterprise is based on the customers' demand. The understanding of the customers' behavior is the result of the deep understanding of their decision behavior. The main purpose of *Chinese Luxury Consumer Behavior Report 2015* (Report for short) is to reveal the current situation, features and future trend of Chinese luxury consumer market in 2015. Firstly, the development condition of the luxury industry as well as Chinese luxury consumers' behavior is analyzed based on the Chinese luxury market situation in 2014 and macro-economic analysis with the development of luxury consumer market. Secondly, sample investigation is conducted for six main cities in China, namely, Beijing, Shanghai, Shenzhen, Guangzhou, Chengdu and Suzhou and 3347 effective samples are obtained. The data is analyzed in use of social science statistic analysis method to further investigate the generality and particularity of purchase decision-making factors for Chinese luxury consumers. The difference study is conducted for luxury target consumers' behavior based on the effect of demographic characteristics as well. Thirdly, the Chinese luxury consumer groups are divided based on Chinese traditional cultural value orientation to explore the cultural value reasons for difference of luxury consumer groups. What's more, the



comparative study is conducted for the luxury consumers' behavior indexes of 2014 and 2015 to summarize the change of the trend. Fourthly, in order to explore "luxury market development under the new normal" as well as "the relationship between luxury industry and internet technology", the focus group interview, deep expert interview and other forms are designed and implemented and the qualitative research is conducted based on these interviews. At last, the judgment and prediction for the future trend of Chinese luxury consumer market based on conclusions concluded by the research are made in this report.

The report research shows that China's luxury goods market in the "New Normal" faces a great deal of opportunities as well as challenges, which can be seen in the following aspects. Firstly, the luxury goods market in China will still stay in the adjustment period, a relative long and continuous process before it recovers and steps into a new and normal development process. Secondly, classic elements and innovation are not the guarantees for sustainable profits of the market. We find out that the market in China is composed of conservative, active and hesitating customers, most part of which is the first type. We predicted that the market will see the flourish growth in high-end tailored needs, steady growth in niche tailored demands and steady recoveries of mass customization during medium and long-term. Thirdly, the omni-channel mode of luxury goods industry is improving. The channels that Chinese luxury goods customers prefer are listing by preference-boutiques, outbound tourism shopping, outlet stores, procurement through friends, overseas online shopping and domestic online shopping. The mode is gradually emerging in China but still at its infant period. So is that in other countries. This is the opportunity as well as challenge facing by the luxury goods brands or their



new growth pole. Fourthly, the personalized consumption is increasingly popular among rational consumers of luxury goods. We observe that Chinese luxury goods consumers are transiting their behaviors from simple imitation or flaunt to self-identify. Lastly, consumption clusters are emerging in China luxury goods market under the influence of culture values, especially the Confucian and Taoist cultural values. The finding explains the fundamental difference between Chinese and Western luxury goods customers' behaviors.

Generally speaking, the luxury goods market requires a comprehensive development which should be drove by technical innovation. Furthermore, the luxury goods consumption doesn't mean the luxury goods waste for the former pays more attention on the quality and cultural connotation and represents customers' pursuit for better life. Luxury goods brands should take the same strategies in China as in the world in a balanced manner instead of price discrimination strategies in China. Facing the "New Normal", luxury goods brands, in pursuit of sustainable growth, need to adapt to the China's market and learn the features of China's luxury goods consumption.



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