



## 奢侈品行业日新月异的图景

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3月,由中欧国际工商学院和上海市静安区人民政府联合举办的2014第六届顶级品牌高峰论坛在上海展览中心友谊会堂隆重举行。来自全球奢侈品牌的高管、市场营销学专家学者和传媒行业人士共400多位嘉宾齐聚一堂,探讨了奢侈品行业的最新动向。中国是全球最大的奢侈品消费市场,中国的奢侈品公司正专注于在全球范围内推广品牌,中国消费者的偏好和中国奢侈品公司的新战略都是论坛当天热议的话题。

### 以品牌代表中国

全球奢侈品市场有29%的份额来自中国。美国贝恩咨询公司(Bain & Company)合伙人布鲁诺·拉恩斯(Bruno Lannes)向与会专家透露,中国消费者每年花在奢侈品上的人均开销高达2000欧元,超过其他任何国家。然而,高端消

费者的奢侈品大多并非在中国大陆购买,而是在海外。上海滩(Shanghai Tang)执行主席雷富逸(Raphael Le Masne Chermont)表示,“60%的消费都是在中国大陆以外地区发生的。”他认为旅游已成为终极的奢侈品,这意味着旅游零售业务还有巨大的潜力可挖。然而,当荷包满满的中国人在全世界搜寻国际大牌时,谁又在购买中国的高端品牌呢?

在中国依然年轻的奢侈品行业谋求发展之时,这个问题就显得格外有意义。雷富逸表示,今天的中国要坚决摆脱“世界工厂”的旧形象,并创建能够在国际舞台上产生影响的自有品牌。雷富逸强调,“中国要有代表自己的品牌,西方世界的人们应当了解这一点!”他的观点得到了复星集团国际发展部总经理仲雷的赞同。仲雷指出,尽管中国已拥有茅台等传统奢侈品牌,但未来还会有更多的(奢侈品牌)出现。“今后五年,许多中国品牌将发展壮大起来。”他预言道,“届时我们大可不必惊讶。”

# Luxury's Evolving Landscape

By Ana Galán Rodellar

The CEIBS Prestige Brands Forum was again the venue chosen by more than 400 managers and directors from the most prominent international luxury brands to discuss the current trends shaping the ever-evolving industry. The preferences of Chinese consumers, (the largest market in terms of luxury spending worldwide) and the new strategies of Chinese luxury companies fiercely focused on making their mark globally, were some of the issues explored throughout the March 22 event.

## China Branding China

Chinese nationals already account for 29% of the global luxury market, and they spend more than any other nationality: an average of 2,000 euro per capita every year, Bain & Company Partner Bruno Lannes told the gathering of industry experts. However, most of these high-end consumers do not purchase luxury goods in mainland China, but overseas. “Sixty percent of consumption is done outside the mainland,” said Raphael Le Masne Chermont, Executive Chairman at Shanghai Tang. Travelling, he said,



has become the ultimate luxury, which means that there is huge potential for growth in the retail travel business. But

with deep-pocketed Chinese travelling the world in search of internationally renowned brands, who's buying China's high-end brands?

The question takes on even more significance with the changes now underway in the country's still relatively young luxury industry. Firmly moving away from the old image of just being the world's factory, today's China is looking to establish its own brands that can have an impact on the global stage. “China will be branding China; so, people from the West of the world, be aware!” urged Le Masne Chermont. Fosun Group's Senior Managing Director Patrick Zhong agreed and pointed out that although China already has traditional luxury brands such as Maotai, many more are still to come. “In the next five years, many Chinese brands will have greater stature,” he predicted. “Don't be surprised when they come.”

The newcomers will face an extremely competitive market – both at home and globally. International competition is already pushing China's existing high-end brands to rethink their strategies and utilise innovative business models in order to increase their competitiveness. Michel Gutsatz, CEIBS Adjunct Professor of Marketing and MBA Director at Kedge Business School, talked about the three main approaches being used:

- Western brands create Chinese brands. These brands view “Made in China” as a selling point. Some examples include Hermès creating Shang Xia, BMW creating Zinoro, and Estée Lauder creating Osiao.
- Brands created in China by Chinese who view “Made in China” as a disadvantage. The design is made in China but the production is done in Europe. Examples include Anteprema and Sheji/Sorgere.
- Multiple locations based on expertise. These brands set up their production centres wherever there is access to the expertise they need. Therefore, they produce their goods in several countries, depending on the product.

新加入市场的公司将面临激烈的竞争——无论是在国内还是国际市场。国际化竞争正促使中国现有的高端品牌重新思考他们的战略,并利用创新商业模式来增强竞争力。中欧国际工商学院市场营销学兼职教授、法国马赛Kedge商学院MBA和DBA课程主任米歇尔·古泽兹( Michel Gutsatz )谈到了三种主要途径:

- 由西方品牌创立的中国品牌:这些品牌将“中国制造”视为卖点,如爱马仕创立“上下”,宝马汽车创立“之诺”,雅诗兰黛创立Osiao。
- 中国人在中国创立的品牌,但创立者将“中国制造”视为不利因素:这些品牌在中国设计,在欧洲制造,如Anteprima、社稷( Sheji/Sorgere )。
- 根据专业需求在不同地区进行生产的品牌:这些品牌在能够满足其专业需求的地方建立生产中心,因此产品是在不同国家生产的,具体地点取决于产品本身。

## 数字化的机遇与风险

正如今天的其他行业一样,在群雄逐鹿之中,奢侈品牌也意识到了网络世界的重要性。对于某些行业来说,“网上缺席”是市场缺席的同义词。不过对于奢侈品牌而言,情况要复杂得多,他们必须评估网络带来的机遇和风险。

目前中国拥有6.2亿网民,其中逾5亿人拥有移动设备,是世界上最大的网民群体。对于那些想要进军中国市场或巩固在

华地位的公司来说,电子商务是一个有力武器。雷富逸表示,中国的消费者通过上网来了解更多的品牌信息,因此宣传是奢侈品牌在华电子商务的首要任务。“你的网站必须是你最好的店铺。”他建议,“网络营销是吸引消费者至关重要的手段。目前,20-25%的市场预算是用于网络的。”拉恩斯补充道。

这与腾讯网络媒体事业群市场总经理韩志杰的观点不谋而合,他认为网络营销对于在华品牌是不可或缺的。他强调,“即使是对奢侈品牌而言,如果你真的想与消费者互动,那你就必须借助新兴数字平台。”

然而,数字化也与风险相连。许多高端品牌认为,奢侈品消费一个不可分割的部分,就是消费者亲临店铺购物时所体会到的附加值。如果商品是通过网络购买的,那么这种体验就会被彻底改变,因此电子商务恐怕并非所有顶级品牌的理想工具。托德斯( Tod's )中国区总经理伟德智( Edoardo Vittucci )指出,尽管他们信任电子商务,但仍会坚持店铺里的零售体验。Vhernier副总裁伊曼纽尔·阿里奥迪·维斯多米尼( Emanuele Aliotti Visdomini )也担忧地表示,利用数字媒体在中国加速推广可能会损害公司品牌,而不是起到促进作用。

因此挑战在于,如何在奢侈品牌的传统精髓与当下最新的潮流、创新之间取得平衡。正如巴黎HEC商学院市场学教授安妮·米绍( Anne Michaut )所说的,“数字化”一词就其定义而言,是对每个人开放的,而奢侈品只向少数人敞开大门。“但数字化是当前消费者的需求。”她强调说。



从左至右:米歇尔·古泽兹、雷富逸、布鲁诺·拉恩斯

From left: Michel Gutsatz, Raphael Le Masne Chermont and Bruno Lannes



## Going Viral

In their fight for turf, luxury brands – like the players in every other industry today – recognise the importance of the online world. In some cases, not having a presence on the Internet is synonymous with being absent from the market. When it comes to luxury brands, however, things become more complicated, and brands need to assess both the opportunities and the risks that come with being online.

With about 620 million Internet users, more than 500 million of whom sign on with mobile devices, China is now the biggest network in the world. That makes e-commerce a powerful tool for firms that want to position or consolidate their brands in the country. According to Le Masne Chermont, Chinese users go online to know more about brands, so education is the priority of e-commerce in China. “Your website must be your best shop,” he advised. Online marketing then becomes a critical aspect of brands’ marketing plans. “Digital marketing is critical to engaging consumers. Nowadays, 20-25% of the marketing budget is for digital,” Lannes added.

In the same vein, Jeff Han, General Manager of Marketing at Tencent Online Media Group, sees online

marketing as a necessity for brands in China. “Even when it comes to luxury brands, if you really want to interact with your customer you need to use the emerging digital platforms,” he emphasised.

However, there are also risks associated with going digital. Many high-end brands believe that an integral part of purchasing luxury goods is the added value that the personal, in-store experience offers. That experience radically changes when products are purchased online, so e-commerce might not be an ideal tool for all prestige brands. Tod’s China Director Edoardo Vittucci pointed out that although they believe in e-commerce, they prefer to stick to the retailing experience in the stores. Vhernier’s Vice President Emanuele Aliotti Visdomini also expressed concern that accelerating branding in China through digital media could damage his company’s brand, rather than enhancing it.

The challenge, then, is how to balance the traditional essence of luxury brands with today’s latest trends and innovations. As Marketing Professor at HEC Business School Anne Michaut noted, digital is – by definition – open to everyone, while luxury is reserved for a select few. “But digital is what customers request now,” she stressed.