



China Luxury Forecast
2015

中国奢侈品报告

RUDER FINN/IPSOS

罗德公关/益普索市场研究集团



Survey Methodology & Respondent Profiles

调研方法及受访者概况

Three-month online survey conducted during the summer of 2014

2014年夏季持续三个月的线上调研

1,933 consumers in 15 Greater China cities

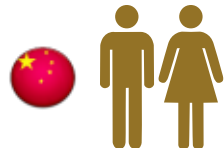
1,933名来自大中华地区15个城市的消费者

1,616 consumers in 14 mainland China cities

1,616名来自中国大陆14个城市的消费者

317 consumers from the Hong Kong SAR

317名来自香港特别行政区的消费者



Via Online Questionnaire

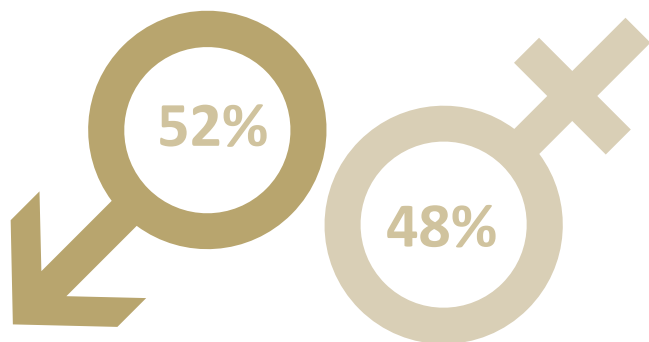
线上问卷调查



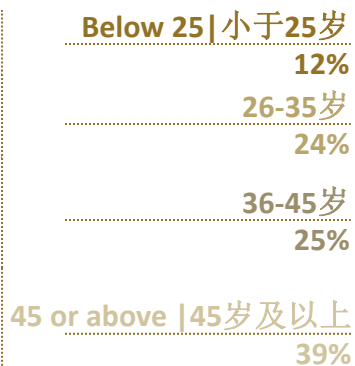
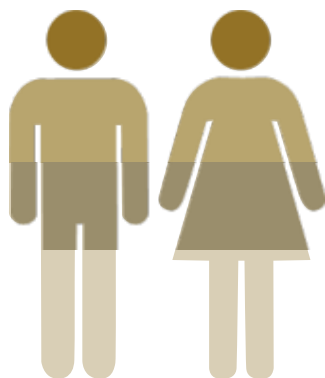
Hong Kong Respondent Profiles

香港地区受访者概况

Gender 性别



Age 年龄



Geography 地区

New Territories
新界
41%

Kowloon
九龙
31%

Hong Kong Island
香港岛
28%

Annual Household Income 家庭年收入



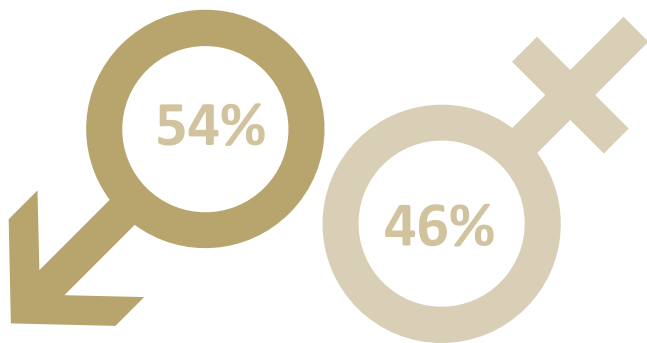
YEAR

Average annual household income:
家庭平均年收入:

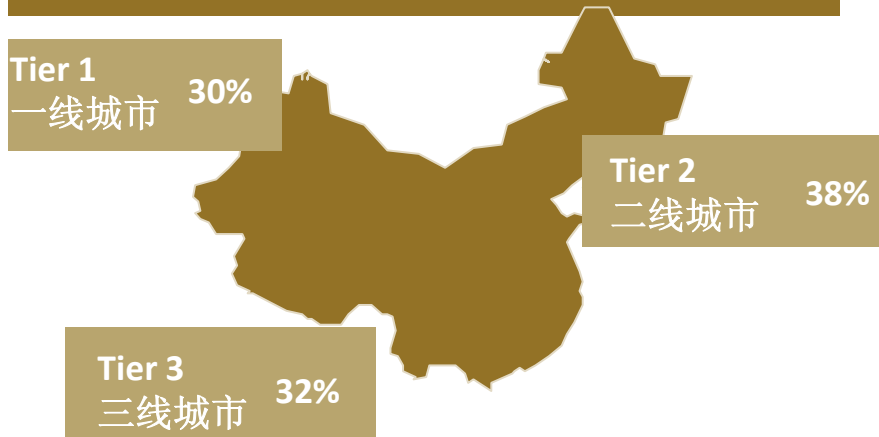
HKD 983,300



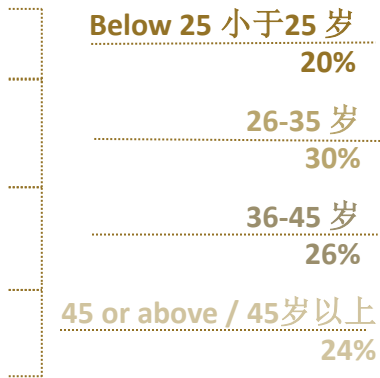
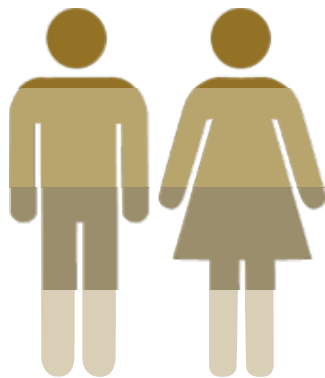
Gender 性别



Geography 地区



Age 年龄



Annual Household Income 家庭年收入



Average annual household income:
家庭平均年收入:

RMB 774,876



Unchanged Market Dynamics
持续活跃的市场

Consumer confidence and intent to spend shows continued, ongoing momentum, implying constant market dynamics overall.

整体奢侈品消费市场活跃依旧，消费者信心十足，未来的奢侈品消费将与现在持平或有所增长。



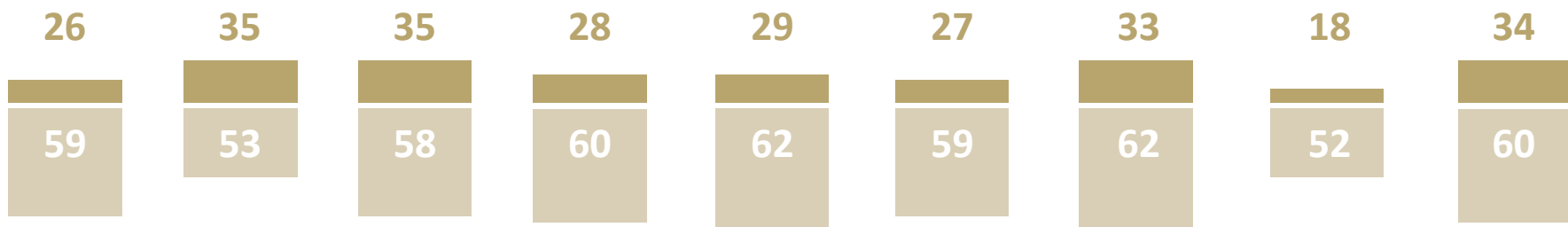
Mainland China

中国大陆



Hong Kong

香港



Spending More
花费更多

Remains the same
花费一样

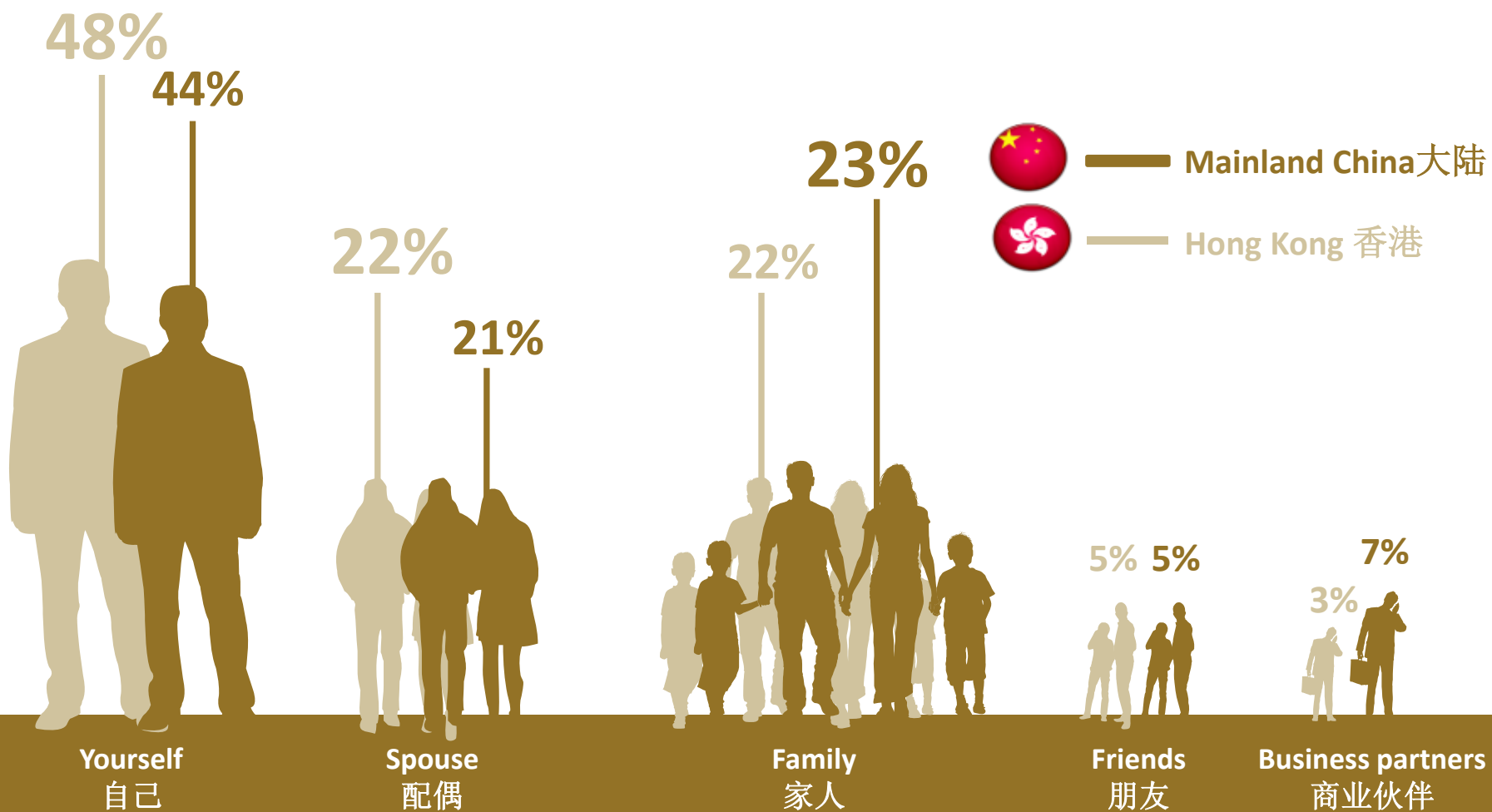
A6a: Are you willing to spend more, the same or less on luxury items in the next 12 months compared with the past 12 months?
调查问题：跟过去12个月相比，在未来的12个月内，你愿意花更多、同样还是更少的钱在奢侈品上？



Changing Consumption Patterns: Self-indulgence Trumps Gifting
消费模式转变：自我享乐型消费超越送礼型消费

Increasingly sophisticated consumers prefer to spend on goods and services for themselves and their families.

越来越多成熟的消费者更倾向于为自己和家人购买奢华产品及服务。



A8 : What is the approximate proportion of spending on luxury goods on each party?
调查问题：请问你为以下社交人群在奢侈品上的消费比例大约是多少？

As part of the general consumer desire for luxury experiences over products, travel is now the number one category, followed by fine wines & spirits.

部分消费者更偏好奢华体验而非产品本身，旅游成为了位居榜首的奢华消费品，其次是酒类。



Mainland China 中国大陆

61% 41%



Yourself 自己



42% 24%



Spouse 配偶



43% 30%



Family 家人



Hong Kong 香港

59% 34%



44% 20%



45% 26%



A9: If you consider gift for yourself or others, which categories are you more likely to choose?
调查问题：如果你要送礼物给自己或他人，你会考虑下面哪一个类型的奢侈品？



Travel: The Ultimate Luxury

旅游：极致奢华

The Chinese outbound travel industry has enjoyed strong, rapid growth in recent years.
 近几年来，中国出境游产业呈现强劲增长

nearly 100 million mainland Chinese travelled overseas in 2013

2013年有将近**1亿**的中国大陆游客选择出境游

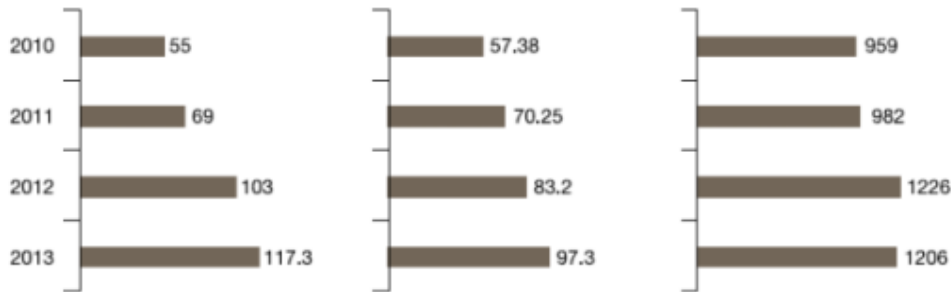
Spending an estimated USD 117.3 billion - equivalent to 40% of global luxury goods sales

消费总额约**1173亿**美元——相当于全球奢侈品消费总额的40%

Total spending by Chinese outbound travelers (USD billions)

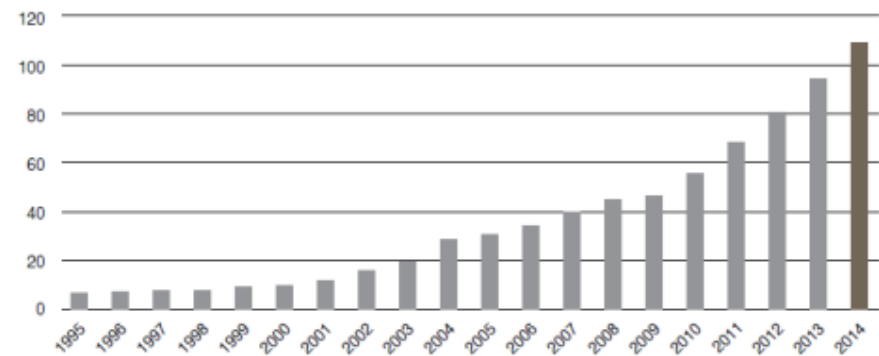
Number of Chinese outbound travelers (millions)

Average spend by Chinese outbound travelers (USD)



Source: CTA, COTRI

CHINESE OUTBOUND TRAVELERS 1995-2013
 (IN MILLIONS OF BORDER CROSSINGS)
 COTRI FORECASTS 2014



Data from China Tourism Academy and the China Outbound Tourism Research Institute
 数据来自中国旅游研究院以及中国出境游研究所

Greater China consumers are willing to spend more on travel in the coming year than on any other category of luxury.

大中华地区的消费者更愿意将钱花在旅游上，而非其他奢华品类。



Mainland China 中国大陆



Travel

旅游

Spending More

花费更多

50

Remains the same

花费一样

45



Hong Kong 香港



Travel

旅游

Spending More

花费更多

38

Remains the same

花费一样

56

Spending More
花费更多

Remains the same
花费一样

A6a : Are you willing to spend more, the same or less on luxury items in the next 12 months compared with the past 12 months?
调查问题：跟过去12个月相比，在未来的12个月内，你愿意花更多、同样还是更少的钱在奢侈品上？

Fine dining and shopping for luxury goods were the top two preferred leisure travel activities.

享用美食与购买奢侈品是休闲旅游中消费比重最大的两项



Hong Kong 香港



Mainland China 中国大陆

Fine dining
高级餐饮



60%

61%



Shopping for
products with
local characteristics
购买有当地特色的商品

Visiting
entertainment
complex
参观乐园



41%

54%



Shopping at luxury
product destinations
在奢侈品聚集处购物

SPA
水疗



29%

Gaming in
casino
赌场博彩



19%

47%



Shopping at luxury
outlets
在奢侈品特卖场购物

N4 Which of the following activities have you participated during your last leisure trip?
调查问题：在该次休闲旅游中，你参加了以下哪项活动？

Duty-free is now a leading distribution channel for luxury goods.

如今，免税店已逐渐成为主要的奢侈品销售渠道。



Mainland China 中国大陆



Total
总和



Beauty
化妆品



Fine wines & Spirits
酒类



Handbags
包袋

Duty free
Stores
免税店

53%

38%

31%

26%



Hong Kong 香港



Total
总和



Fine wines & Spirits
酒类



Beauty
化妆品



Accessories
配饰

Duty free
Stores
免税店

30%

24%

16%

13%

C6 : For each of the following types of luxury goods, please indicate through which channels you have purchased them in the P12M.

调查问题：在过去12个月内，你曾在以下哪些渠道购买过奢侈品？



Changing Consumption Patterns: Dissatisfaction with Luxury Retail Service Drives Overseas Purchasing

**消费模式转变：
对本地奢侈品零售店服务的不满促进了境外奢侈品消费**

Less than 20% of consumers were satisfied with luxury retail services in mainland China.
仅有不到两成的消费者对中国大陆地区奢侈品零售店的服务表示满意。

Retail Service in Mainland China 中国大陆地区零售店服务



Mainland China 中国大陆

Dissatisfied 不满意



36%

19%



Very satisfied 非常满意



Hong Kong 香港

Dissatisfied 不满意



63%

10%



Very satisfied 非常满意

B8 Can you tell me your overall satisfaction with luxury retail services in China and Hong Kong respectively? Please use a scale from 1 to 5, where 5 represents very satisfied, while 1 represents very dissatisfied.
调查问题：请问你分别对中国及香港奢侈品零售服务的整体满意程度是...? 请用1-5分进行评分, 5分代表“非常满意”, 1分代表“非常不满意”

Top sources of dissatisfaction are limited product selection, unknowledgeable staff, and poor customer service.

三大因素导致消费者零售店服务不满：产品选择不足，店员知识有限，以及糟糕的客户服务。

Retail Service in China 中国大陆零售商店服务



Hong Kong 香港

39%

Unknowledgeable staff
店里员工的知识有限

36%

Poor customer service
糟糕的客户服务

33%

Short-tempered staff
员工脾气欠佳



Mainland China 中国大陆



40%

Limited product selection
商品选择不足

37%

Unknowledgeable staff
店里员工的知识有限

31%

Brands emphasize celebrities too heavily
品牌过于着重名人效应



B4 Do you have any complaints about your experiences with luxury brands in China? And if so, what are they?
调查问题：一般来说，你在中国境内与奢侈品接触过程中，有哪些方面让你产生不满？如果有，通常会是一些哪些方面？



Challenges & Opportunities for Luxury Brands Online

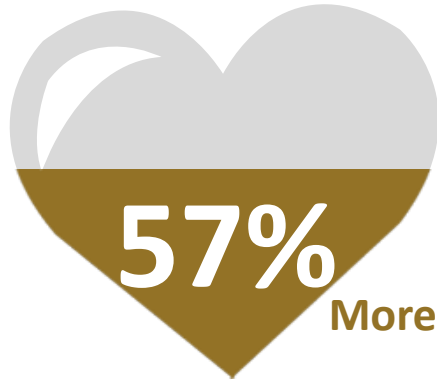
奢侈品电商：挑战与机遇并存

Luxury consumers exhibited greater confidence in online luxury shopping over the past 12 months.

在过去的12个月中，奢侈品消费者对网上购买奢侈品表现出更多信心。



Mainland China 中国大陆



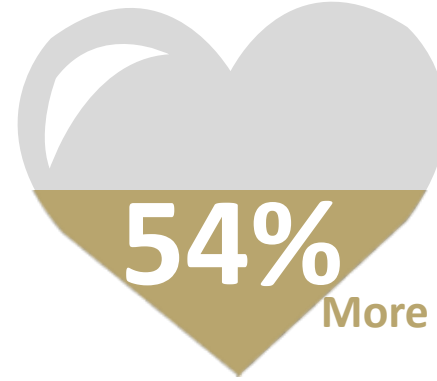
More confidence
更有信心



Less confidence
更没有信心



Hong Kong 香港



More confidence
更有信心



Less confidence
更没有信心

D7: Which of the following options would best describe your confidence in purchasing authentic luxury items online in the past 12 months?
调查问题：在过往的12个月里，你在网上商店购买正牌奢侈品的信心

Consumers still preferred to visit physical stores before deciding to purchase.

在决定网上购买前，消费者更乐于先到实体门店寻求更多信息。



Mainland China 中国大陆

YES
78%



Hong Kong 香港

YES
81%

D11 When you plan to purchase luxury goods online, will you go to physical store to look for further product information?

调查问题：当你计划在网购买奢侈品时，你会否到门市查看实体货品信息？

When shopping online, Chinese consumers were concerned about service and trust in products, while Hong Kong consumers pointed to overall professionalism of the website.
网购时，中国大陆消费者对电商服务与信誉心存疑虑，而香港消费者则更在意网站的专业性。



Mainland China 中国大陆

Lack of reliability
不可靠



Concerned the item
will arrive in a poorer
condition than agreed
担心商品会在运输过程中受损



Too much of a hassle
to do a return / exchange
退换货太麻烦



Need to touch and
see the physical product
需要触摸和看到实物



Hong Kong 香港



Delivery time
is too long
交货时间太长



Website does not offer
the brands that I want
网站没有提供想要的品牌



Lack of
professional advice
缺乏专业意见



Website unable to offer
luxury experience that
I would find in the
retail store
无法提供零售商店里享受的奢华购物体验

D8: Which of the following concerns do you have about buying luxury goods online? Please select 3-5 answers that you feel is most relevant.
调查问题：当你在网上购买奢侈品的时候，你会有以下哪些顾虑？请选择3-5个你觉得相关的答案。



Social Networking
社交网络

Social media is more relevant in mainland China than in Hong Kong.
与香港比较，中国大陆地区的社交媒体与日常生活的联系更为紧密。



Mainland China 中国大陆

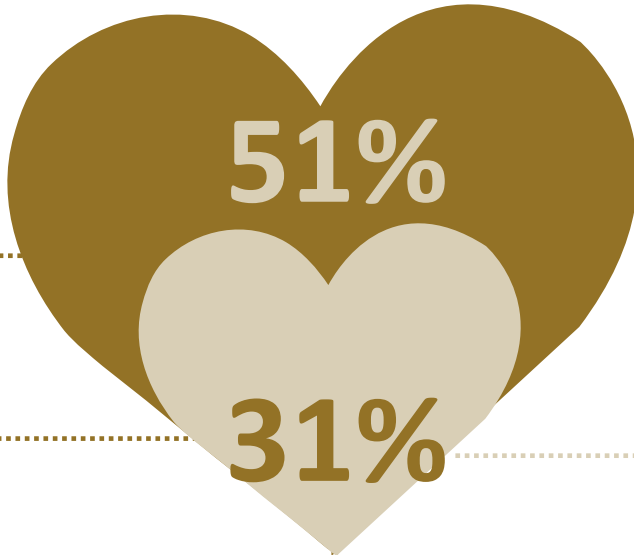


Hong Kong 香港

Tier 1 一线城市
n= 483

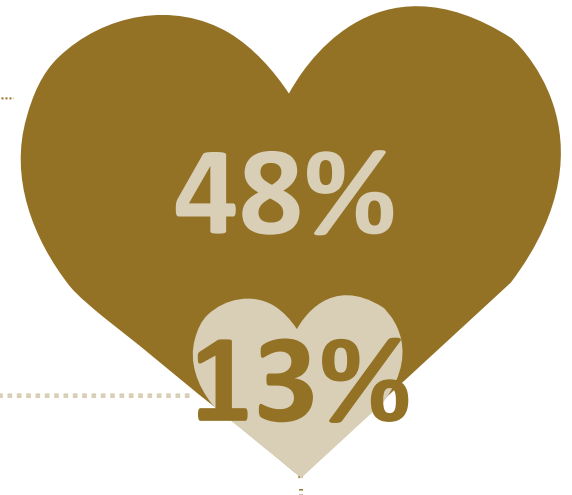
52

39



Relevant
to my life
有关联

Completely relevant
to my life
非常有关联



E9. Generally, how relevant is social networking platform to your life?
调查问题：一般来说，社交网站平台和你的生活有多大关联？

Social networks were the second most influential luxury information source in the mainland and third in Hong Kong.

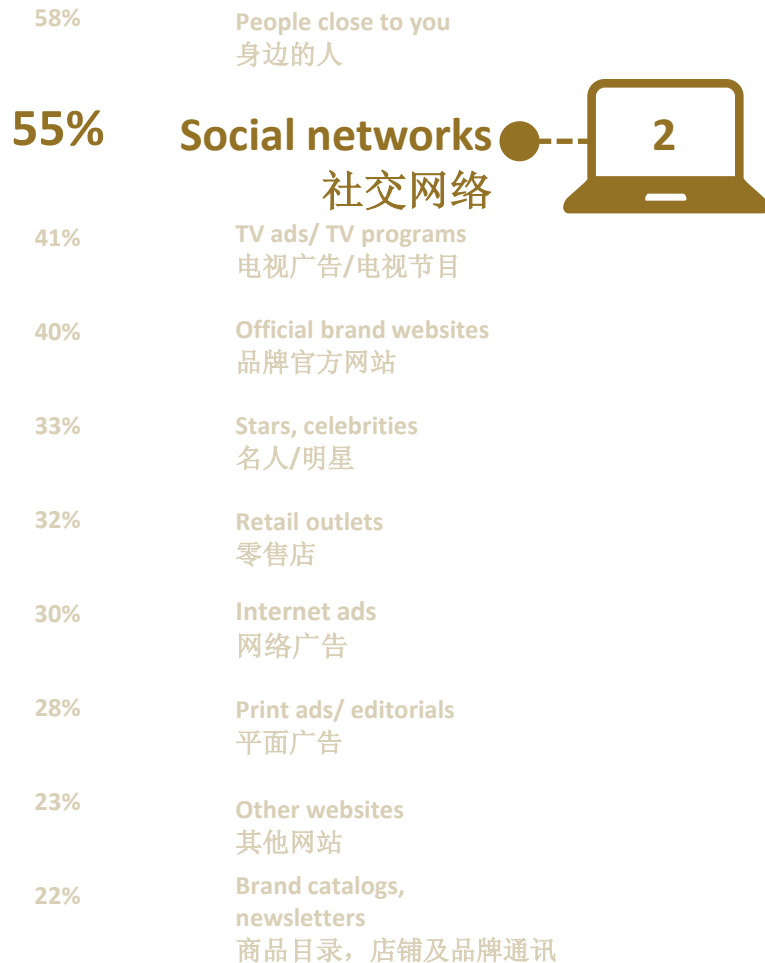
在中国大陆地区，社交网络是第二大影响消费者获取奢侈品信息的渠道，在香港则位列第三。



Mainland China 中国大陆



Hong Kong 香港



E1. Which of the below is the most influential source of information for you on luxury goods and brands?
调查问题：以下哪个渠道会影响你对于货品的选择？

Mainland China and Hong Kong consumers tend to be influenced by different social networking platforms.

中国大陆以及香港的消费者获取信息的社交网络平台有所不同。



Mainland China 中国大陆



Wechat 微信
58%



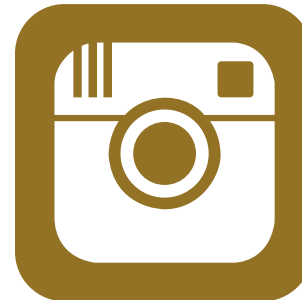
Weibo 微博
52%



Hong Kong 香港



Facebook
71%



Instagram
26%

E2. Here is a list of social networks. Which of these social networks influence your brand choice?
调查问题：请问以下哪些在线社交网络会影响你的品牌选择？

Consumers love sharing news about products, promotions and discounts through social media.

消费者热衷于在社交媒体上分享产品信息，产品推广以及打折信息。



Mainland China 中国大陆

News about products
商品的新信息

51%



News about promotion & discounts
商品推广及折扣信息

45%



Hong Kong 香港

News about products
商品的新信息

38%



News about promotion & discounts
商品推广及折扣信息

34%



E12. What types of brand information do you usually share on social network?

调查问题：你通常会在社交网络分享以下哪一类品牌信息？

Overall market dynamics are unchanged

整体市场依旧活跃

- **Demand** is still high 需求依旧高涨
- Consumption Patterns have **shifted** 消费模式转变
- **Experiences reign** over products 消费体验重于产品本身

Travel is the ultimate luxury

旅游: 极致奢华

More Spending is still abroad 境外消费增加

Duty Free is on the rise 免税店销量持续增长

Challenge - Maintaining **brand loyalty** overseas 挑战: 维护海外的品牌忠诚度

The Internet is a force to be reckoned with

网络影响力不容小觑

Social media is the **key influencer** 社交媒体的影响巨大

E-commerce is a **REAL player** 电商扮演着重要角色

The Next Challenge & Opportunity 挑战与机遇并存