



关于上海疫情管控期间的洞察与展望：奢侈品零售行业

Navigating Shanghai's Lockdown

Insights & Perspectives: Luxury Retail Industry



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简介

Introduction

上海作为中国的商业中心，之前正处于疫情开始以来最严格的疫情管控之下。在这个由16个区组成的6341平方公里的城市中，从起初的几周，最终变成长达两个月的时间，这不仅导致了经济停滞，也严重影响了正常供应，近2600万的上海居民的日常生活也遭受了前所未有的考验。然而，我们始终可以相信上海这座城市的复原力，因为居民们自发联合起来团购必需品，并在社交媒体上为受影响的居民提供了大量支持。经过两个月的居家办公，随着2022年6月1日上海正式回归正常生活，员工们现在也逐步恢复了正常办公状态。

China's commercial hub of Shanghai was under one of the strictest lockdowns since the start of the pandemic. Across this sprawling city of 6,341 sq. km comprising 16 districts, the lockdown did at times seem to bring this economic powerhouse close to a standstill. Initially expected to last a few weeks, the lockdown stretched to two months causing significant disruptions to supply chains and testing the mettle of its estimated 26 million residents. However, the city's resilience has been a silver lining as neighbours banded together over group buys for essential goods and an outpouring of support on social media for residents affected by the lockdown. After two months of working from home, employees are now adjusting to returning to the office as the city formally ended its lockdown on 1 June 2022.

全球奢侈品零售业

The Global Luxury Retail Industry

在全球范围内，奢侈品市场将在2022年产生3491亿美元的收入，其中20.8%的总收入来自于线上销售。市场容量为1097亿美元，奢侈时尚领域预计将是最大的。

Globally, the luxury goods market will generate USD349.10 billion in revenue in 2022, with 20.8% of total revenue from online sales. With a market volume of USD109.70 billion, the luxury fashion segment is expected to be the largest.

据路透社报道，上海的奢侈品零售业占全国的12%。中国领先的英文新闻出版物《中国日报》引用自West South Cloud的一份报告称，北京SKP（北京领先的高档商场）在2021年实现销售收入239亿元人民币，高于2020年的177亿元人民币。

According to Reuters, Shanghai is home to 12% of the country's luxury retail sector. China Daily, the country's leading English-language news publication, cited a report by West South Cloud that suggested SKP Beijing (a leading, upscale mall in Beijing) achieved sales revenues of RMB23.9 billion in 2021, up from RMB17.7 billion in 2020.

Vogue Business分享的数据预测，虽然今年中国奢侈品市场的增长速度可能会放缓，但该行业预计仍将增长15-18%。

Data shared by Vogue Business predicts that while the growth rate in China's luxury market will likely slow this year, the industry is expected to increase by 15 – 18%.



Source: Unsplash

上海奢侈品零售业面临的挑战

Challenges Facing Shanghai's Luxury Retail Industry

在最初，在上海有实体店的奢侈品和零售品牌都不得不暂时关闭。随着政府不断收紧政策，网上购物也相继停止。

With the initial lockdown, luxury and retail brands with physical stores in Shanghai had to close temporarily. Online shopping was discontinued as the city moved to contain the situation on the ground.

全国供应链的中断给零售业带来了额外的压力。例如，在上海有仓库的奢侈品牌面临的物流问题，因为从上海发往全国其他地方的货品运输在一夜之间被中断。自2022年初以来，北京、深圳和西安也面临严格的管控措施。

Disruptions across the country's supply chain resulted in additional strains on the retail industry. For example, luxury brands with warehouses in Shanghai faced logistics issues as deliveries within the city, and the rest of the country became non-existent virtually overnight. Beijing, Shenzhen, and Xi'an have also faced strict containment measures since early 2022.

另一个挑战是在此期间收入的明显损失。虽然不是每家公司都能实现2022年的销售目标，但通过加强对批发和电子商务渠道的努力，已经采取了积极的措施和行动来减轻影响。

Another challenge is the apparent loss of revenue during this period. While not every company will achieve its 2022 sales target, proactive measures and action are in place to mitigate the consequences of the lockdown by strengthened efforts on wholesale and e-commerce channels.

转变策略：奢侈品牌如何驾驭上海所面临的困局

Shifting Gears: How Luxury Brands Navigate the Lockdown in Shanghai

在高端奢侈品牌中，亲临现场的互动和交流构成了与客户联系的基础，品牌又该如何应对，让重要客户（VICs）参与进来，并让客户能感受到被重视。

Taking a page from high-end luxury brands where in-person interactions and personalised touch points form the basis of connections with customers, how do retailers navigate the lockdown and keep very important customers (VICs) engaged and feeling pampered.

奢侈品牌已经通过在消费者方面采取创新策略，转移并打造虚拟空间。虽然消费者已经适应了电子商务平台的进行日常采购和购买必需品，但对于虚拟体验式的零售并确保高度个性化的触达则是另一门更高深的艺术。

Luxury brands have shifted gears and moved into the virtual space by adopting innovative strategies on the consumer front. However, while the city and country are attuned to eCommerce platforms for daily purchases and necessities, creating and curating experiential retail virtually and ensuring highly personalised touchpoints is a delicate art.

多年来，奢侈品牌已经培养了一种新颖的方法，称为“私域”（Private Traffic），客户通过分享他们的微信信息、店内促销活动的更新、会员专属活动的邀请或发现新的艺术作品。这种高度个性化和有效的沟通方式使品牌能够提供“远程”销售协助，与客户建立单独联系，加深与客户的关系，让VIC感到被重视。

Over the years, luxury brands have cultivated a novel approach called Private Traffic, where customers share their WeChat details to receive personalised communication, updates about in-store promotions, invitation to exclusive members' only events, or discover new art pieces. This highly personalised and effective form of communication enables brands to provide "remote" sales assistance, connect with customers individually, and create emotional connections where VICs feel special and pampered.



Source: Cindy Chao / Unsplash / Instagram

同时通过与拥有强大社交媒体知名度的时尚博主和KOL合作，奢侈品牌已经将他们与客户的沟通和接触策略提炼成一门精确的艺术。

Complemented by strong social media visibility and the deft use of fashion bloggers, influencers, and key opinion leaders (KOLs), luxury brands have refined their communication and engagement strategies with customers to a precise art.

在此期间，知名的护肤品牌组织了在线课程，线上教学DIY面部按摩，而奢侈品零售商则提供了高级瑜伽馆的七天虚拟课程——以满足人们对精神健康日益增长的需求。

During Shanghai's lockdown, leading skincare brands organised online classes teaching DIY facial massages, while luxury retailers offered seven-day passes to virtual classes at premium yoga studios – addressing the increasing awareness and demand for mental well-being.

为了进一步提升体验，面向对艺术感兴趣的VIC，各品牌也举办了虚拟文化俱乐部——邀请知名作家、导演和音乐家来讨论书籍、诗歌、电影和专辑。

Further elevating the experience, brands tugged at the hearts of VICs with a flair for the arts by hosting virtual cultural clubs – inviting well-known authors, directors, and musicians to discuss books, poetry, films, and albums.

帮助奢侈品零售业的员工保持工作热情

Helping Employees in the Luxury Retail Sector Stay Engaged

鉴于上海的商店暂时关闭，在员工管理方面，奢侈品零售商在封控期间也作出了相应灵活的调整。

On the employee front, luxury retailers have shown flexibility during the lockdown, given the temporary closure of stores in Shanghai.

奢侈品品牌特别关注员工的福祉，实施了各种员工福利计划，从精神和情感的角度支持他们的团队。例如，在早期阶段，为员工提供充足的食物供应，满足员工的基本需求。在某些特殊情况下，奢侈品牌还确保为零售员工提供正常生活的薪资补偿，因为他们的主要薪酬来源是销售佣金。

Paying particular attention to employee well-being, luxury brands implemented various employee welfare programs to support their teams from a mental and emotional well-being perspective. For example, providing ample food supplies in the early stages of the lockdown met employees' basic needs. In some instances, luxury brands also ensured adequate compensation for retail employees' livelihoods as a large portion of their remuneration comprises sales commissions.



Source: Unsplash

疫情之后：对上海的奢侈品牌有什么期望？

Post-lockdown: What Are the Expectations for Shanghai's Luxury Brands?

从6月1日开始上海回归正常，从街边小店到267万家企业开始逐步重新开业，人们对于上海的奢侈品零售业的反弹恢复到疫情之前也抱有很高的期望。

With 2.67 million businesses ranging from corner shops to global manufacturers cautiously re-opening as the city ended its lockdown on 1 June, expectations are high for Shanghai's luxury retail sector to bounce back to pre-COVID levels.

主要客户群体的增长更多来源于中高阶层，这也是2022年及以后奢侈品零售业发展的一个关键因素。

Growth in the upper-middle (affluent) class, who form the bulk of the customer base, is a critical factor for the luxury retail segment in 2022 and beyond.

随着对品牌意识和情感纽带的持续增强，特别是随着物流的恢复，以及零售商场和购物中心的重新开业。奢侈品品牌预计在封控结束后会重新出现销售热潮。

With continued emphasis on brand awareness and emotional bonding, luxury brands expect a sales boom after the lockdown, especially with the resumption of deliveries, and the re-opening of retail malls and shopping centres.

奢侈品牌与所有其他业务部门一样，正在适应并不断实施创造性的战略活动和行动计划，以恢复收入的损失。同时也会相应增加时尚活动及客户关怀，通过更有针对性的现场活动来达成销售目标。

Luxury brands – as with all other business segments – are adapting and continuously implementing creative tactical campaigns and action plans to recover the loss of revenue. Some observers predict an increase in fashion events, in-person customer care appointments, more ambitious sales goals and targeted on-the-ground activities.

虽然普遍的市场情绪都显示出强劲的复苏，但另一端的分析家们却提出了不同的看法，他们认为今年中国大陆的同比增长仅为3%，对比几个月前预测的15%-18%大幅下降。

While the general sentiment points to a robust recovery, analysts at the other end of the spectrum are predicting a modest 3% year-on-year growth in mainland China this year, down sharply from the 15% - 18% forecast from a few months ago.

总结：我们该何去何从？

Conclusion: Where Do We Go from Here?

虽然当下的情况还不明朗，对于消费者信心以及是否有可能恢复到疫情之前的水平仍然感到担忧。但这次经历提醒我们，全球经济是紧密相连的。随着商业格局的快速变化和不断发展，适应性和灵活性的需求对于雇主和雇员而言是至关重要的，就像上海的奢侈品零售商一样，面对疫情更要有快速反应的敏捷性。

While the situation may seem uncertain, with concerns over consumer confidence and whether a possible recovery to pre-COVID levels is possible, the lockdown is a reminder that global economies are closely interlinked. With the fast-changing and constantly evolving business landscape, there is a crucial need for adaptability and flexibility among employers and employees, with the agility to react quickly as Shanghai's luxury retailers have.

员工观点

The Employees' Perspective

在这个充满挑战的时期，确保员工的情绪和精神健康是每个企业正常运营的基础。照顾他们的情绪健康，不仅能获得短期回报，还能加强员工的参与度。从长远来看，它可以促进归属感和忠诚度，并最终对生产力产生积极的影响。

Ensuring our employees' emotional and mental well-being is fundamental to every organisation's success. Taking care of their emotional health during this challenging period not only reaps short-term rewards and strengthens engagement. In the long term, it fosters belonging and loyalty and ultimately positively impacts productivity.

健康、福祉、财务稳定和工作保障是中国奢侈品零售业和全球所有行业的员工最关心的问题。

Health and well-being, financial stability, and job security are top concerns for employees in the luxury retail industry in China and across all industries around the globe.

企业可以通过有意义的方式来解决员工不断变化和多样化的需求，包括快速响应当前的业务挑战，并制定整体的员工薪酬计划来预测未来的变化。此外，更重要的是创造真正的接触点，打造积极的员工体验，确保人才充分发挥其潜力。

Businesses can address employees' changing and diverse needs in meaningful ways, including responding quickly to current business challenges and adopting a holistic employee compensation plan that anticipates future requirements. In addition, creating genuine touch points to forge a positive employee experience ensures talents reach their full potential.



Source: Unsplash

消费者观点

The Consumer Perspective

对于奢侈品牌未来的发展方向，通过线下店铺结合个性化的虚拟触点，打造全新的进店体验，这个转型或许也会成为整个行业的game changer。

Creating in-store experiences complemented by personalised, virtual touch points will be the way forward for luxury brands and likely a game-changer.

国际品牌必须深入了解消费者的喜好以迎合日益成熟的市场，坚持创新并创造适合当地市场的产品。因为以本土元素为特色的设计更可能会引起消费者的共鸣，并对其产生吸引力，以此确保奢侈品牌在其经营的市场上能够实现长期的持续增长。

Understanding consumer preferences to cater to an increasingly sophisticated market, international brands must continue to innovate and create products suitable for the local market. Design elements that feature native elements are likely resonate with and appeal to the consumer, ensuring long-term sustained growth for luxury brands across the markets they operate.