BUILDING BRIDGES:

BRANDS IN AND OUT OF CHINA TODAY

建立传播桥梁：

中国本土及国际品牌研究白皮书

JACK MORTON

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Introduction

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The story of China over the past few decades is one of enormous growth and rapid change. Foreign brands coming into China have achieved both huge successes and catastrophic failures. Consumer needs and expectations continue to evolve dramatically. And increasingly, Chinese brands, businesses and cities are reaching out to markets and customers beyond China's borders.

There is much to learn—and this white paper has been compiled to share expert insights from business leaders close to the heart of developing brands in and out of China.

Let's begin with brands coming out of China. As China moves from "Made in China" to "Designed in China" there is a need for a dynamic shift in how Chinese marketers communicate their brands. Such a shift challenges brands to adapt at an incredible pace and to persuade skeptical, brand-bombarded overseas consumers, many of whom may have negative perceptions of Chinese product quality. Simultaneously, much like their corporate equivalents, Chinese cities are also developing their brands to build awareness and attract corporate investment and tourism. In many instances, cities are still being defined for the domestic Chinese market, but ultimately, cities are vying for overseas investment and tourism—and cities, like commercial brands, can be highly competitive with one another.

For brands seeking to build relationships in China, understanding nuances between varying consumers and cultures is vital. Marketers must recognize these differences and adapt their products and brands. Many of the catastrophic failures mentioned earlier are brands that stubbornly adhered to rigid product consistency in China. For example, a well-known fast food company has failed to gain the market share in China that it enjoys in other markets principally due to a lack of localization. China is different and requires brands to align to its own culture and tastes. Even Chinese consumers' well-known love of luxury goods is increasingly reflected in luxury brands' ability to adjust to the market and respond to specific Chinese needs rather than simply importing their products to China.

Chinese consumers are receptive to engaging with brands, less cynical than their Western counterparts and extremely open to adopting new technologies. According to a 2010 eMarketer report, by 2014 China will have 957 million mobile Internet users and 1.3 billion mobile subscribers. The numbers are staggering, and the opportunity all the more incredible given that Chinese mobile users are not nearly as monetized as their peers in the US. The upside is vast, and as the population continues to grow in affluence the opportunity for brands to connect with Chinese consumers will be great.

There are so many great lessons to be learned from branding in and out of China, many of them touched on in the following articles. I hope you enjoy them, and I encourage you to let us know what you think.

Finally, and most importantly, I wish to thank our contributors for sharing their expertise and their time.

BALANCING BRANDING IN/OUT OF CHINA

Balancing Branding In/Out of China

Adrienne Bateup-Carlson is Executive Vice President, Interpublic Marketing Services.

Consumerism is a powerful force in China, but it's still relatively recent. Look around you and all the evidence is of a sophisticated marketing culture: glossy magazines, outdoor, digital, TV advertising and aggressive retailing. Scratch the surface and you find that in many categories consumers lack depth of knowledge—the knowledge that comes from growing up with brands. So it's a mistake to assume that Chinese consumers really appreciate the nuances of your category; brand aspiration and desire must be balanced with rational understanding of product functionality and benefits.

Consider categories we take for granted, like coffee. When coffee started to become popular in China, on-line groups and "coffee-lover" clubs appeared, created by consumers seeking knowledge. But Chinese consumers are fast adopters; once understanding takes hold, watch out. Ten years ago, you'd have to walk far and wide in Beijing to find a coffee shop; today there's one on every corner. Starbucks alone plans to triple the number of its stores in China by 2015, with some expansion into China's second and third tier cities.

Brands that involve, inspire and empower China's eager consumers will win their hearts. Branding can be sophisticated and marketing very polished, but beneath it all there's an education gap, and a desire to learn. Tell your brand story….and they will come.

For brands coming into China, the easiest mistake to make is that the consumer will simply prefer your brand because it is international. Competition is tough, consumers are already familiar with many big-name brands and (unless your reputation goes before you) you must be ready to invest in building your brand—or it will get lost in the crowd. China is without reservation one of the most exciting and opportunity rich markets today. But it's already a crowded market, with many international brands now established following long-term investment to build brand equity, create a market and negotiate multiple challenges.

"Made in China" is a strong emerging trend. Chinese consumers are proud of and loyal to their leading home-grown brands, especially those taking-on the global leaders. Sportswear brand Li Ning is expanding internationally and is now number two to Nike in sales in China.

For a new, unknown brand, significant effort is needed to familiarize and engage consumers: you must tell your story and find the point of relevance and connection with the Chinese consumer. Those who do so will succeed. Those who assume that "being here" is all that's required for success will be very disappointed.

Trust is a huge issue in China for all marketers. After scandals in many food and processed goods categories, Chinese consumers don't feel safe. Building trust and reassurance with consumers is a vital task, and requires constant vigilance. For the multi-national in China, despite stringent standards and international reputation, problems can arise in the supply chain and serious brand damage can ensue.

Just as relationships (*guanxi*) are essential in business, in consumer marketing the celebrity factor is mandatory. Whereas Western consumers may regard celebrity endorsement with a level of skepticism, in China the celebrity ambassador, trendsetter or opinion-leading blogger exert a powerful influence. In a striving and crushingly competitive society, becoming famous is the dream. Celebrity endorsement adds the glamour factor every time.

"Good taste and cultured living" reflect the aspiration in a society that continues to transform at an unprecedented speed. A romantic vision of the future dominates many consumer categories. A client once said to me, "That's not cultured" about a proposed brand image. What she meant was: "That reflects where we have come from, not where we want to go." The rustic references in the image were positive to a Westerner and negative to an urban, upwardly mobile Chinese woman.

It's a common mistake is to think of China as a single market or focus only on Tier 1 cities (Beijing, Shanghai and Guangzhou). China is vast and diverse. Cultural nuances, lifestyle and value sets vary from region to region—and although there is a strong central government, power and responsibility are also devolved regionally. The Mayor of a major provincial city may have political power and budget equal to the President of France, and famous local beer brands, foods, sports teams and heroes generate passion and loyalty.

The biggest opportunity right now is to go beyond the obvious. The major brands are now developing markets in Tier 3 cities and major provincial centers where there is significant spending power but less to spend money on than in cosmopolitan mega cities. New categories like home décor are growing fast, as the emerging middle class buys larger homes with European-style kitchens and bathrooms. Well-off Chinese host outdoor parties complete with barbeque in the summer, and their kids are playing tennis, golf and riding. In fashion, many of the most celebrated luxury brands are now seen as "mum's brand"; the young and wealthy are looking for "creative luxury" brands that reflect stronger self-expression and individuality.

The obvious success stories are easy to identify:

- There is a Starbucks on every corner; the China business was developed by a young Hong Kong entrepreneur.
- McDonald's, Procter & Gamble, Nestle, Nike, adidas, Uniqlo and Muji are all present on the high street and in the glittering malls.
- On the highways, Mercedes Benz, Audi, Fiat and VW dominate following many years of brand-building, joint ventures and investment.
- In consumer electronics all the global brand names compete with Chinese equivalents, and the queue at the flagship Apple store is consistently long on any day of the week.
- Global conglomerates like Siemens and GE enjoy the same reputation for innovation in China as they do in the west. Good business is simply good business anywhere.
- Hermes has launched a new brand, Shang Xia, to bring the Hermes philosophy to China and create a Chinese Hermes. This is a unique strategy from an international fashion house in a region that has now become the company's principal market.
- Jack Ma, the founder of China's pervasive e-commerce ecosystem Alibaba, is the most famous individual in a business-crazed culture. He is a role model representing a highly successful brand and business, and a personal commitment to CSR (watch this space).
- Haier Group—one of Time Magazine's Chinese brands most likely to become global—has struggled to lift its brand image in developed markets where the entry point was affordability. However, investments in technology, innovation and a joint venture with Fisher&Paykel may change all that.
- Air China, China Mobile, CCTV and the ICBC Bank are all ranked among top global brands.

Air China has transformed its brand experience from indifferent at best to an excellent service and extended market share; Air Southern is doing the same.

- Weibo (Chinese Twitter), Renren and Kaixin (Chinese Facebook) can't literally and functionally be integrated as the platforms don't connect, due to the so-called great Chinese firewall. This is a challenge now for international brands, and potentially for consumers. China's burgeoning netizens are all active in-country on the Chinese digital platforms. For international brands moving into China, the platforms are there and flourishing. Recently a young Hollywood starlet was the first to create a brand presence on Weibo, a savvy move creating a huge new fan base. For Chinese brands moving out, an in-market strategy will be needed for different geographies.

Right now, China's value set is, to quote a local colleague, "all material". Deng's statement that "To get rich is glorious" has been taken to heart and Chinese are industrious and persistent. How will this change as the middle class emerges, and values shift to re-focus the inner as well as the material quality of life? In five years from now—or even less—brands with global-scale and capability and "Chinese characteristics" may emerge as an exciting and viable alternative to the current model of Western emulation.

LIFESTYLE BRANDS IN CHINA

Lifestyle Brands in China

Silence Chen (Chen Mo) is Greater China Brand PR Director at Procter & Gamble.

For good reason, lifestyle branding in China is a topic that has attracted significant attention. As is well known, over the past 30 years, tremendous changes have taken place in China's politics and economy, and at the same time, China's huge population has undergone momentous changes in purchasing power, consumer expectations and availability of quality products. Lifestyle brands that have paid close attention—balancing in-depth understanding and a comprehensive view on the China market—have fared well.

Generally speaking, there are two important characteristics in China's consumer market.

First, in comparison with relatively mature markets in the West, the development of the market in China started late, but its rate of development is very fast. Having grown up in this environment, Chinese consumers are adapted to rapid market development—making them better able to accept new products, aware of trends, full of confidence and armed with very high demands for consumer products. Chinese consumers also pay great attention to how well products fit their lifestyle and emotional requirements.

Second, given the evolving nature of the market in China, the differences and varying demands among consumers tend to be multitudinous—presenting both an opportunity and a challenge to lifestyle brands. A critical issue in marketing strategy is whether the product should be targeted at a select audience group, or made to meet the needs of consumers at various levels.

So, given that the market is rapidly developing, multifaceted in levels of demand and increasingly competitive, how can international lifestyle brands achieve success in China? I recommend special attention to three factors.

Firstly, and also most importantly, brands must have accurate insight into consumers' mentality and needs. Beyond understanding consumer demands, an international lifestyle brand furthermore needs to satisfy and even guide consumer demands. Take Olay as an example, with which I am most familiar. In 1989, Olay arrived in China as the first international skin care brand to enter the market, and immediately made a huge splash among consumers. At that time, China's market economy had been on track for just about 10 years; consumer demands were pressing, and Olay quickly became a widely known brand with its focus on anti-aging products. In the early 1990s, based on consumer studies, Olay found that female consumers in Asia not only had demand for anti-aging skin care products, but also an even greater desire for whitening products. This was particularly the case in China: as a nation heavily dependent on bicycles for transportation, women often found themselves riding under the hot summer sun. This drove huge demand for products such as sunscreen and whitening agents.

In response to this consumer insight, Olay launched a special product series for the China market, which met rapid success. Based on similar innovation and insight, Olay also ventured into the men's skin care field to satisfy the demands of male consumers in Asia and chose China as its global launch location. This skin care brand from the United States gained an accurate insight into the demand of local consumers in the markets of

China and Asia, and established the core of its research, development and design in whitening and male skin care products here.

This touches upon the second success factor: brands must accurately understand globalization. Globalization is not moving a brand from overseas into China "as is". Localizing a brand does not mean rigidly adding localized elements and language. So what's the correct balance between the international brand and its local development? Although this depends on the specific brand, in general brands should maintain what's enduring—culture, history, tradition—even as they understand and reflect consumers and market considerations. Elements that reflect local consumer demands should be fully incorporated at the very beginning of product design, instead of reluctantly added at a later stage.

Thirdly, in addition to getting these fundamentals right, it's extremely important to choose good partners. A careful selection must be made regardless of whether the partner is a media entity, a marketing and communications company, a brand spokesperson or a public opinion advocate. As brands enter the Chinese market these partners are essential to communicating critical information to consumers, and telling consumers the important story behind our brands.

There is an old saying in China that goes, "Change ten thousand times without departing from the original essence"; this is the status quo, and this is also the future for the development of lifestyle brands in China. In an endlessly changing market, an insight into consumers is the "essence," and the key for success lies in meeting and guiding their demands as well as in demonstrating a brand-new possibility and a more beautiful vision for their lifestyles.

What's also worth mentioning is that brands native to China will also show increasingly powerful momentum and competitive edge in future development. The "Made in China" of today will gradually be transformed into "Created in China," which will raise the stakes for international brands in China, and more importantly, will drive development of the entire industry at a more rapid pace.

MASTERCARD AND CHINA

MasterCard and China

Ling Hai, Division President, Greater China, MasterCard Worldwide.

Expansion in China

Over 20 years ago, MasterCard became the first international credit card company to enter the Chinese market. In the years since, China has grown to become one MasterCard's most important international markets.

MasterCard's initial brand strategy was to educate consumers and business customers about credit cards—a strategy that endures today. As a result, many of China's leading banks began to see the value of credit card issuances, and as foreign investors poured into China, credit cards started to enter the market. In 1984, the Beijing Fragrant Hill Hotel became the first business entity in China to accept MasterCard.

MasterCard's approach in China was to lay the foundation, work with issuer banks and merchants, introduce the latest technology and emphasize the value of credit cards over cash. Importantly, MasterCard pragmatically sought to go with the flow in China, offering guidance where possible, but not attempting to force changes of a more fundamental nature. Although MasterCard supports free and open markets, it recognizes that timing is important and China sets its own timeline. It therefore seeks to align the merits of its business—speed, convenience, security and transparency—with government policy.

MasterCard also stresses that its real competition is with cash. In China, with cash now accounting for about 70% of all payments, down from 100% in the early 1980s, the battle against cash remains an important one. While consumer habits have changed significantly since MasterCard arrived in China, cash is still king. But, with a rapidly growing middle class, increased consumption and more consumer choices—more high-end goods and services, entertainment, travel, autos, fine wine, art etc.—credit cards are becoming more popular.

Chinese Consumers

Aside from the needs of issuer banks and merchants, consumer behaviour is the major influence on MasterCard's strategy for localization in China. In addition to language, localization requires context—context that's clearly relevant to Chinese consumers. Demonstrating MasterCard's contribution to the community is key, as is showing how integrated the company is with Chinese society as a whole. It's less about corporate data and more about being embedded in the lifestyles of aspirational and affluent members of society.

As China's middle class has grown, so has the number of very rich people. According to Boston Consulting Group, in 2010 the number of millionaires in China grew 31% on year to 1.11 million, excluding wealth tied up in privately held businesses and property in the mainland. The country now has the third largest number of millionaires after the US and Japan. Consequently, there's a growing appetite for foreign travel, education, investments in property and business. China is now a critically important market for luxury brands.

Brand Strategy & Awareness

Since the late 1990s, MasterCard's Priceless campaign has been a cornerstone of its global marketing campaign to offer cardholders opportunities to enjoy unique and memorable experiences–often intangible ones that go beyond what money can buy. As a result, the Priceless campaign (known as wujia in China) resonates with the affluent Chinese. MasterCard is now reshaping and revitalizing Priceless for the local market with the Wanshida Ren concept. Wanshida Ren targets young affluent consumers, combining Priceless qualities with a sense of membership to a special club. The concept fits nicely with the events held at the MasterCard Center and other programs, including fund-raising and community activities, that the tap the energy of a slightly younger group of people.

In January 2011, MasterCard acquired the naming rights to the Wukesong arena, which had hosted basketball and other events at the 2008 Olympics held in Beijing; a sponsorship that reflects its long-term commitment to China. The MasterCard Center is the first Olympics venue in China to be commercially renamed, and illustrates MasterCard's aim to be part of the fabric of the community. The venue will tie-in with other international MasterCard campaigns, such as Purchase with Purpose and Priceless Cities. It's a state-of-the-art venue that has sold out for major concerts throughout the year and enabled MasterCard to host all manner of stakeholders at events involving some of the world's biggest acts, such as The Eagles, Aaron Kwok and The Cranberries. For each show, there's a full social media campaign, with lucky draws and contests for unusual and fun activities linked to the performance.

Challenges

Alongside the successes and growth MasterCard has enjoyed during the past 25 years, China has presented plenty of challenges. The biggest of these lie with technology, the need for training and the long-standing preference for cash. It's changing slowly, but the Chinese are reluctant to buy on credit.

From a technical standpoint, the days when merchants needed to call or fax overseas to obtain authorizations are long gone. MasterCard uses the latest transaction settlement technology to ensure consumers security, speed and convenience. Right now, the focus is on mobile technology and secure e-commerce transaction tools.

Future Vision

MasterCard's business in China is growing. It remains focused on replacing cash in the transaction process and continues to make progress: credit-card usage is growing rapidly, as are e-commerce and mobile payments. More important for MasterCard, however, is the need to position itself as more than just a transaction solutions provider, but as a company that oils the wheels of business and contributes to the life and character of the community. The Wanshida Ren concept and activities based around the MasterCard Center focus on the local community and will gain momentum in the coming months.

BUILDING A MADE IN CHINA BRAND

Building a Made in China Brand

Luke Xiang is Marketing Director of Chery Quantum.

For the past 20 years, I have been working in marketing and building brands, both established international brands entering China and other markets, and domestic Chinese brands being built from the ground up.

In my view, to create a successful brand name is to create a special chemistry between the brand and its targeted customers. Let us take the example of a consumer who goes to the store to buy toothpaste. He only wants to buy toothpaste to brush his teeth and cares little for the brand he buys; in this case, between him and the tube of toothpaste, there is only a pure and simple physical reaction. On the other hand, if he insists on getting a particular brand of toothpaste, then we could say there is an emotional, even a chemical reaction between him and the brand.

To encourage this emotional reaction to happen, we have a lot of work to do, such as finding a suitable "catalyst"—but also, of paramount importance, we have to understand the Chinese market and the habits of Chinese consumers.

There are three features unique to the Chinese consumer market at its present stage of development. First, in many Western countries, middle-income consumers are a mature group; they have fixed consumption habits and are very clear in what they want of a product. In the Chinese market, we have an emerging class of middle-income consumers who are brand-conscious, with rising expectations of brand image. To a certain extent, the desire for a brand carries and represents their awareness and expectations of their economic and social status. The brand image and its appeal, and other soft powers are what some of the less successful brands in China lack.

Second, overall Chinese consumers from many perspectives face a confidence crisis regarding domestic Chinese brands. This is not to say the Chinese consumers are not patriotic; one has only to look at the Chinese audience in international sporting events to discover their patriotism—their loud cheering and fanatical support of Chinese teams come naturally from deep within their hearts. But the consumers have had terrible experiences with domestic brands, and these have given rise to their lack of trust in Chinese brands.

The advertising company Saatchi & Saatchi has developed a brand-loyalty principle: First, transform a "trademark" into a "trust-mark" in the hearts of the consumers, and then, upgrade it to a "love-mark". In the Chinese consumer market, many domestic brands have not even attained the "trust-mark" status, yet they are in a hurry to pursue the "love-mark" target.

Third, to Chinese consumers, publicity through word-of-mouth is very important. In comparison to the overly-exaggerated advertisements and other paid media, Chinese consumers respond better to free word-of-mouth advertisements.

Given these three consumer characteristics, the first step on the road to success for Chinese brands is the building of consumer trust in the brands. The basis of this trust is quality. By quality, I mean not only product quality and other tangible features, but also service quality and other soft features; you can't have one without the other. The rapid economic development in the past 30 years has led to vast improvements in the tangible features of Chinese brands, but it makes the lack of soft features even more pronounced. Events involving quality issues in recent years, from tainted milk products to the high-speed train accidents, have shown the glaring lack in soft features. Our high-speed train technology is top of the line, and the milk-production facilities are also world class; it was the "people" element that was not prioritized. There is an old saying: To complete a task, first complete the person. If you want a successful career, you first need to get the "people" aspect right. This is because "people" are the embodiment of a brand, when everybody knows the kind of people that stand behind your brand, their trust in you grows.

In ancient Chinese war strategy, the three major factors to winning a war—"favorable natural conditions, geographical advantages and harmony among the people"—the "people" element is especially important. This principle still holds true in today's marketing. A brand's success depends on making opportunistic choices (favorable natural conditions), skillful handling of market demands (geographical advantage) and, most importantly, on the "people" behind the brand. On the basis of soft qualities being more important than the tangible qualities, we must first cultivate soft power, then build our trustworthiness, and use the soft qualities to endow our brands with more spiritual appeal, allowing our brands to become a part of the lives of our consumers. In this way, the reputation of our brands will spread by word of mouth and we will conquer the market, even to the wide open space of the global market.

The key to venturing into international markets is to first find a balance between localization and internationalization of your brand. A perfume brand, for example, will tend towards maintaining its own brand image; a red wine brand will have make adjustments to suit the demands of the local market and food habits of the local people.

The same principle holds true when an international brand ventures into the Chinese market. Take the famous example of Procter & Gamble's Pampers. In terms of soft power, Procter & Gamble endows its products with a new meaning that is very suited to the Chinese market. In China, the majority of families are single-child families, where the hopes and loving care of the whole family are focused on that single child; naturally, parents have high expectations of the child. Procter & Gamble was the first to sell the idea that adequate sleep is very important to the development of intelligence in an infant (and the company used obstetricians as catalyst to promote the importance of sleep), and that Procter & Gamble Pampers help a baby sleep longer and more peacefully, thus making the baby smarter and healthier. At the same time, the tangible qualities of the product ensure that soft power was realized. Procter & Gamble uses polymer compound technology to make sure the Pampers are dry and comfortable; they thus differentiate from their competitors and obtain brand premium.

Marketing isn't just making claims; building a brand name is even more important. This process is very similar to raising a child, with long-term vision and sustained loving care, and not by forcing growth prematurely. Only in this way can your brand survive in the lives of the people, and not on their bank accounts. In the days to come, more and more domestic Chinese brands would gain the trust and love of Chinese consumers; among them, those brands with a Chinese flavor and which are quick to gain the trust of domestic consumers, will be the ones to make inroads into international markets, winning more consumers over to their side, and bringing greater quality experiences into their lives.

CITY BRAND IMAGE AND ATTRACTING INTERNATIONAL INVESTMENT

City Brand Image and Attracting International Investment

Li Dazhuang (David Lie , SBS, JP) is a Member of the National Committee of the Chinese People's Political Consultative Conference, Executive Chairman of Newpower Group and China Concept Consulting, and Chairman of Hong Kong-Taiwan Business Co-operation Committee.

My earliest memory of Chinese cities investing in their images and "brands" goes back to the mid-1980s, when the 14 coastal cities with open economies in mainland China came to Hong Kong to run a promotional event for attracting investment from overseas. At that time, China had just started on the path to reform and opening up to the outside world, and the promotion of coastal cities to the outside world quickly drove the rapid development of China's economy.

Over the nearly 30 years since then, I've witnessed the dramatic growth of Chinese city-branding. Today, Hong Kong alone hosts more than 30 provincial-level and ministerial-level promotional events annually for attracting overseas investment; in addition, many provinces, cities and municipalities also hold trade and culture promotional events around the world to draw foreign investment. These activities are mainly directed by relevant authorities such as the Ministry of Commerce, the Ministry of Foreign Affairs and the China Council for the Promotion of International Trade. These events put the image of Chinese cities on full display across the globe, and also create opportunities for inland enterprises and foreign merchants to sign contracts, helping to make China the export titan it is today. My own experience with events and conferences includes the Canton Fair, 9+2 Pan-Pearl River Delta Forum, Northeast China Fair, and China International Fair for Investment and Trade.

Today, in addition to recognizing the achievements that have been made, it's vital to understand the challenges to continued commercial and cultural development—challenges that make city branding all the more important.

During the past 30 years, China's economy has been developing at an incredible pace, with GDP doubling every five years on average. Today, having reached a certain scale, growth will certainly slow down. As a result, how can provinces and cities in China continuously look for new growth? This is a challenge.

For example, if we asked a consumer in the US, the world's largest market, "How much do you know about the city Hohhot?", she will definitely need to search for a long time on Google before answering. While there's an overall impression of China, the challenge faced by numerous cities in China is how to own a brand that belongs only to the city, and have an image that differs from those of others.

In my view, in terms of the branding of cities, there are two types of cities in China, which need to be looked at separately.

Cities of the first type, such as Beijing and Shanghai, already have their own intense colors and flavors, which are unique and cannot be replicated. Beijing is the political and cultural center of China—with the weeping willows of the Forbidden City and the transparent beauty of the Water Cube, Beijing has witnessed the rising winds and surging storms over China for several thousand years; meanwhile, Shanghai is China's economic and financial center, the exemplar of its international vision and culture. These cities are already mature brands; both tourists and foreign investors are aware of their attractions. In the area of cooperation in international trade, they not only need to "bring in capital from overseas," but also must "go overseas and make investments."

Cities of the second type, such as most second-tier and third-tier cities in China, do not have a clear and definite brand image for "buyers"; they may even fail to leave any impression on them. Cities of this type, in my view, should not hastily engage in attracting overseas investment, but need to first explore and get acquainted with themselves again, and then build bridges extensively in the international arena. This is the Chinese-style strategy of "sharpening the axe will not delay the work of chopping firewood."

Let's take the city of Harbin as an example for specific analysis. Whenever Harbin is mentioned, the impression on many people may be limited only to the annual Ice and Snow Sculpture Festival. But there are 12 months in one year. Except for the Ice and Snow Sculpture Festival, what are the unique features of this city? From the perspective of sports events, being covered with ice and snow in winter and being cool and pleasant in summer, this city can host international sports events such as hockey league matches in winter and marathons in summer, and invite friends in the athletics field and worldwide media to come, attend, and explore Harbin's elegance in their spare time.

Harbin is also a city of unique culture and history. Because of its geographic location, Harbin is deeply influenced by the former Soviet Union, evident in the arts, culture and religion. St. Sophia Cathedral, built by czarist Russia in the early 20th century, is the most perfectly preserved example of Byzantine Revival architecture in China and the city has preserved many "red oil paintings" of the former Soviet Union. Again due to the proximity to the former USSR, until 1985 Harbin was home to a community of over 20,000 Russian Jews, who left a unique cultural legacy in the city.

City branding can help Harbin grow as well as protect and carry forward its history and culture for a new era. In my view, cooperation with Russia on integrated themed tourist projects could, for example, turn Harbin into a "must-see" city for arts and culture, inspiring more people to come to Harbin and creating a stronger city brand. In consideration of Harbin's unique historical assets, there is sufficient opportunity for developing about 10 international exchange projects each year—projects that can attract large numbers of tourists from China and abroad, and build a vivid impression of Harbin that will resonate emotionally.

A vital first step of city branding is simply this: make friends. Promoting a city is about building relationships, which requires long-term cultivation, building trust and establishing contacts between two parties. This is the prerequisite and foundation for attracting investments from overseas in the long run.

The ancients said: "One who knows himself and knows others can fight a hundred battles with no danger of defeat." Just like Harbin, every city has its own stories. The government, as the leading force at the initial stage, should evaluate the continually developing city with regard to its quality, in order to see itself clearly and express itself well; secondary to this, it must understand the demands of the buyers. This is called knowing yourself and knowing others, and is also the level that a city brand should reach.

Regarding the future trend of city brands, my answer is: Adjust to changing circumstances. This is because no one holds a crystal ball in hand that can predict the future. In order to survive, we must learn how to change and adapt, because our consumers are changing, the environment around us is changing, and especially in today's constantly changing China, our cities need to look in a mirror and carefully look at their brand-new selves, just like seeing an old friend that they haven't seen for ages.

LUXURY BRANDS IN CHINA

Luxury Brands in China

Norman Chan (Chen Jiayue) is Director of Kerry Development (China) Limited.

The following is based on an interview conducted with Norman Chan in July 2011.

What is different about luxury brands in China?

You have to start with the Chinese consumer. Beyond the cosmopolitan centers of Beijing and Shanghai, the majority of luxury spending is coming from satellite and manufacturing towns. For the most part, these consumers are still in a stage of learning about luxury brands. They tend to be reactive, more followers than leaders. The typical consumer still relates luxury to price point, meaning that in their mind, high price is equivalent to luxury. Also important for most Chinese consumers is the visibility and presence of the brand. That can be seen in packaging: the louder and more ostentatious, the better.

But I would say that Chinese luxury consumers are changing. In my work as a developer, we are always looking towards the future. We build for the future in anticipation of changes to consumer behavior.

How are Chinese luxury consumers changing?

The change is particularly evident in a more cosmopolitan center like Shanghai. Consumers there are arguably becoming more conscious of luxury brands as a reflection of their own personality and style, and more discerning in their choices. There is an increased trend towards travel, to Europe and other places where Chinese consumers are seeing international luxury brands, and that exposure to brands in other markets increases their sophistication.

Luxury brands are reacting to this trend in different ways. Some still have doubts about the pace of consumer change. In development, once we commit to build a project, we go, knowing that it will take some time to complete a project and to see our predictions come true. So we've committed to this trend and believe that Chinese consumers will increasingly make more sophisticated, forward-looking luxury choices.

What about retail store environments for luxury brands in China? What are the trends?

Flagship stores are an important tool for luxury brand-building in China. The stores are getting bigger, in part because the range of products and price points is growing. The more successful brands are extending their ranges in China, with those in accessories adding ready-to-wear, and vice versa. Accessories remain very important as gift-giving is a critical element of luxury sales in China. Some luxury brands are very opposed to mixing their first lines with their second or tertiary lines, but others are more relaxed in anticipation of what they believe the markets are looking for. These brands have built multi-level stores, two to three stories high, in order to accommodate yet still separate their first and second tier lines.

Given the size of the stores, the façades may be three or four stories high—physical presence is key—and brands employ the world's best designers to achieve the freshest looks, to the point that we are seeing more and more rapidly updated store designs. Inside, more space means consumers' store experience is much nicer: merchandise is not so cramped, they can navigate price points more clearly and there is less "hard sell" from the staff. The luxury brands are also treating the store as a place to express the lifestyle aspects of the brand. Some offer a branded café within the store. Among younger consumers, there's a terrific appetite for accessories for their Apple, iPhone and iPad products—so in the stores, one sees many examples of the luxury brands taking advantage of this rising and obvious trend.

What international luxury brands have been particularly successful coming into China?

The more traditional European luxury brands such as Louis Vuitton, Gucci and Chanel have done well because they are very well defined. The less successful brands have not been able to carve a clear enough path in how they manage their positioning, both in relation to price point and style. Ralph Lauren is successful but not as clearly understood as other luxury brands in China. In general, the European brands have been more successful in defining and marketing themselves to Chinese consumers because they have a longer history than American brands. Overall, the trend for luxury brands is forward-looking classics as well as brands bearing the designer's name: Alexander McQueen, Marc Jacobs, Michael Kors, Paul Smith and Tom Ford, for example.

What are some of the most successful strategies to build luxury brands in China?

Again, start with the flagship stores: they are critical. Next, brands are becoming more dependent on the internet, as the flow of information and consumer use has increased dramatically. There is also a heavier emphasis on public relations including selective co-branding. And premier road shows are now taking place in China. It's not just New York and Paris: places like Shanghai and Beijing are becoming a critical stage to launch as well as other markets.

What will be different for luxury brands in China five years from now?

As I said before, designer labels will become more visible and stores will continue to grow. Simultaneously, luxury brands will need to find ways to safeguard their image, customer service and merchandise range to keep pace; they cannot simply expect their growth to be at the same level year after year. There will be more choices and there will be more customers capable of making choices. For me the very interesting opportunity is to anticipate demographic changes and the ways that consumers will become more sophisticated. As the baby boomers age, brands will look to the "30 to 35'ers" who can amass a lot of wealth very quickly, or those coming from manufacturing towns. Luxury consumers will be looking for more than just a handbag. Their hunger for luxury products will extend to hotels, vacations, experiences.

On the developer side, I believe the most important key to success is to achieve the best mix of content, well balanced between luxury goods and popularly priced products and services for a more complementary lifestyle, and to embrace forward-looking trends and brands. That becomes a shopping center's own statement, and helps it to differentiate from what's already in the market and not just repeat more of the same.

For a development brand, as for a luxury brand, that really is the essential thing, in China and elsewhere: to be clear on your positioning, and to be absolutely authentic as to who you are as distinct from all the others.

引言

引言

彭泰勒(Ben Taylor)，Jack Morton 亚太区总裁

在过去的几十年间，中国经历了巨大的变化和快速的发展。在进入中国的外国品牌中，有的获得了巨大成功，也有的遭遇了惨败。消费者的需求和期望持续快速发展。与此同时，中国品牌、企业和城市正在逐步开拓海外市场和客户。这其中有许多值得我们学习的经验。

此白皮书旨在分享致力于在中国发展中外品牌的企业领导人的真知灼见。

让我们先从走出国门的中国本土品牌说起。随着中国从“中国制造”逐步转向“中国设计”，中国市场营销者宣传其品牌的方式需要一个动态转变。这个转变向品牌提出挑战，即要迅速地适应这个转变，并赢得持怀疑态度、品牌选择余地丰富的海外消费者（当中许多可能对中国产品质量持有负面看法）。同时，中国城市也在树立品牌形象，以建立知名度并吸引公司投资和发展旅游业。在许多情况下各城市的竞争力仍然限于国内市场，但对于各城市而言，终极目标将是海外投资及旅游业——如商业品牌一样，城市之间将展开激烈的竞争。

对于寻求在中国发展的国际品牌而言，了解不同消费者及文化之间的细微差别是至关重要的。市场营销者必须认识到这些差异，并使其产品及品牌适应这些差异。许多品牌惨败个案就是公司在中国顽固而死板地坚守产品一致性的结果。例如，在其它市场业绩颇佳的某知名快餐店由于缺乏本地化方案，无法在中国获得同样的市场份额。中国具有很多独特之处，这就势必要求品牌入乡随俗，适应中国的文化与品味。中国消费者的需求甚至体现在许多国际奢侈品的设计中，它们为酷爱奢侈品的中国消费者量身定做符合他们需求的产品，而没有简单地把既有产品输入中国。

中国消费者容易接受品牌，没有西方消费者那么挑剔，并且对新技术的应用极为开明。根据 2010 年 eMarketer 报告，到 2014 年中国将有 9.57 亿移动互联网用户和 13 亿手机用户。这些数字令人叹为观止，个中蕴含的商机更是无可限量（因为中国的手机用户还远未达到美国那样高的商业化程度）。而随着人口继续增加，品牌在中国消费者中建立联系、发掘商机的潜力是巨大的。

在中国的本土和国际品牌的塑造中，有丰富的经验值得我们学习，其中很多方面均在下列文章中有所提及。我希望这本书将对您有所帮助，并期待您提出宝贵的见解。

最后，也是最重要的，我衷心地感谢所有作者为这本书贡献了宝贵的时间和见解。

平衡进入与走出中国的品牌

平衡进入与走出中国的品牌

贝安恩 (Adrienne Bateup-Carlson),
埃培智市场咨询,整合营销执行副总裁

目前消费主义正悄然兴起，它是拉动中国消费市场的主要动力。我们周围有很多成功营销文化与理念的实例：时尚杂志、户外休闲、数字媒体、电视广告以及积极扩张的零售业。但是，不难发现消费者对许多产品都缺少必要的品牌认知能力，而对品牌的认知是企业与消费者长期互动的结果。所以不要想当然地认为中国消费者会真正了解产品间的细微差别，消费者对品牌的渴望和需求必须与理性的了解产品功能和益处相协调。

就拿咖啡为例，当咖啡刚刚开始在中国流行时，喜爱追求新鲜事物的消费者创建了咖啡爱好者俱乐部和在线分享平台。中国消费者接受新事物得速度很快，如今，咖啡店已经遍布北京大街小巷，而在十年前，想在北京找到一家咖啡店，却不是那么容易的事。仅星巴克一家公司便计划在 2015 年前，将中国的门店数量增至原来的三倍，并拓展至中国的二三线城市。

消费者所青睐的是那些能吸引、激发并调动他们热情的品牌。品牌推广可以熟练老道，营销可以非常精彩，但被其掩盖的，是教育的差距和对知识的渴望。品牌因故事而生动，品牌故事是一个品牌向消费者传递诉求的载体，是与消费者沟通的桥梁。

而对于进军中国的品牌，最易犯的错误是认为消费者会因为这是国际品牌而喜欢上它。如今的中国已被认为是最具有潜力和机会的市场，但是市场竞争日趋激烈，众多国际品牌经过长期投资，树立品牌价值、拓展市场并克服种种困难后，已经确立了自己的市场地位，消费者也已熟知许多知名品牌，如果你的品牌没有良好的口碑，就必须要花时间和精力来构建自己的品牌形象，才不至于被大众遗忘。

“中国制造”现正引领当前新兴趋势，中国消费者对民族知名品牌具有强烈的自豪感和较高的品牌忠诚度。比如正在积极开拓国际市场的运动服装品牌李宁，目前在中国的销量仅次于耐克，排名第二。

对于一个全新的品牌，则需要付出巨大努力才能被消费者熟悉和青睐。所以品牌故事作为与消费者沟通的桥梁将会变得尤为重要。成功的品牌故事将会带来巨大的商业成功，而没有意识到这点的注定会失败。

目前，广大市场营销者在中国面临的一个重大问题是“信任危机”，在多起食品和加工产品丑闻后，中国消费者彻底失去了信心和安全感。摆在人们面前的一项重要任务是重新建立大众信任、恢复消费者信心并时刻保持警惕。对于那些在华的跨国企业，虽然制定了严格标准并享有国际盛誉，但如果供应链环节出现问题也会令公司的品牌受损。

就像“关系”是经商的必要条件，在消费市场中名人效应发挥重要作用。虽然西方消费者可能对名人代言持有一定怀疑态度，但在中国，名人形象大使、潮流达人，甚至知名的博主都具有很强的影响力。在如今这个激烈竞争的社会，成名是大多数人的梦想。而名人代言总是能为产品增添一些亮点。

人们向往那种“高品味和精致的生活”方式，而对这种追求的渴望，在如今以惊人速度变革的社会中是一个强大的推动力。对未来的理想展望决定了许多消费产品的定位。有位客户曾告诉我：某一个品牌形象的提案“不能彰显品牌的尊贵和高雅。”我想她的意思是说“这仅能反映产品的来源，不能反映产品的发展方向。”就如一幅田园乡野的景象可能对于一个西方人而言是美的，但却得不到中国城市女性的认可。
很多品牌容易犯一个错误：认为中国是单一市场

或者只重视一线城市（北京、上海和广州）。殊不知中国地域广阔、发展多元化。不同地区的文化内涵、生活方式和价值观各有不同，虽然都归中央政府统一管理，但地方会被授予很多的权力和责任，在中国，某一个大省的市长所掌控的政治权力和财政预算可能与法国总统差不多，一些著名的本地啤酒品牌、食品、运动队和名人都会让消费者趋之若鹜并忠实于他们。

要想有所发展，必须要立意创新。目前，许多大品牌正在三线城市和主要的省级中心城市开拓市场。因为这里的消费力旺盛，投资却比国际大都市少。随着新兴中产阶级购置房产，并对欧式厨房和浴室的偏爱，以及中西合璧的生活方式使得家居装饰之类的新产品迅猛发展。中国的富人也开始喜欢在自己别墅的庭院中举办烧烤派对，越来越多的“富二代”们开始偏爱网球、高尔夫和骑马等贵族运动。在时尚领域，许多顶级奢侈品牌如今被视为“妈妈们的品牌”，富裕的年轻人正在寻找能更强地彰显自我和个性的“富有创意的” 奢侈品牌。

从下面的成功案例中可见一斑：

- 星巴克的店面如今已遍布中国的大街小巷，它所在中国区业务的掌舵人是一位香港青年企业家。
- 麦当劳、宝洁、雀巢、耐克、阿迪达斯、优衣库和无印良品纷纷进驻商业区和大型购物广场。
- 一直致力于品牌建设和业务发展的梅赛德斯-奔驰、奥迪、菲亚特和大众汽车品牌已牢牢占据市场主导地位。
- 在消费电子产品领域，来自全球的品牌与中国本土品牌展开激烈竞争，苹果旗舰店外，每天都能看到排队购机的景象。
- 西门子和 GE 等全球知名企业在中国和西方市场都在技术创新上享有盛誉，良好的业务发展让公司受益良多。
- 法国时尚品牌爱马仕在中国创立了一个全新的品牌 “上下”，将爱马仕的理念带到中国，打造中国特色的爱马仕。面对如此大的市场，奢侈品作出战略调整来适应中国市场的举动也不算稀奇。
- 作为电子商务平台阿里巴巴的创始人 马云，不断地被冠以“疯子”、“狂人”等称号，但他是对企业社会责任做出个人承诺的典范，而阿里巴巴的成就也是非常成功的商业案例，值得大家借鉴。
- 海尔集团曾被《时代》杂志评为最有可能实现全球化发展的中国品牌，该公司努力提升自己的品牌形象，物美价廉一直是海尔进入市场的切入点，但是不断地对技术创新的投资以及与 Fisher&Paykel 达成的认购协议可能会改变这一切。
- 中国国航、中国移动、CCTV和工商银行都是世界500强品牌。中国国航已将其品牌体验从普通水准提升到卓越服务，努力扩大市场份额；南方航空也紧随其后，提升服务水准。
- 在中国特别是在当前强大的防火墙安全系统下，微博、人人网和开心网因为都是独立的网络平台，不能实现功能性服务平台的整合营销方式。这对国际品牌是种挑战，同时可能对消费者也是种挑战。目前迅速增长的网民积极活跃在国内的网络服务平台上，并且呈现一派繁荣景象。最近，一位年轻的好莱坞新星首先开通微博，这个精明之举使其在中国建立了庞大的粉丝群。所以对于那些想寻求海外发展的中国品牌，需要针对不同地区制定相应的营销策略。

我的一位同事戏称如今中国的价值观是“一切皆物质”。邓小平提出的“致富光荣论”已深入人心，中国人有着勤劳和坚韧的优良品质。随着中产阶级的大量出现，价值观会怎样改变呢？除了关心物质生活质量外，更加注重追求精神层面吗？可以预计今后五年，甚至不到五年的时间，会涌现出许多具有全球视野、国际化能力的中国特色知名品牌，不断摆脱那种简单地照搬西方的商业模式，发挥我们自己的特长，打造出世界级的中国知名品牌，让每个国人都为之振奋。

生活方式品牌在中国

生活方式品牌在中国

陈默，宝洁大中华区品牌公关总监

生活方式品牌(Lifestyle brand)在中国的发展历程、现状和未来趋势是一个倍受关注和充满亮点的话题。众所周知，在过去的三十余年中，中国的政治、经济发生了翻天覆地的变化，与此同时，中国的广大消费者也在从物质水平到精神诉求的各方面，历经了势头迅猛的变革。而紧密关注着这一动向的各生活方式品牌，对这一变化动向以及中国市场的综合特点也是颇有体会和感悟。

总体来说，中国消费者市场存在两个重要特点。首先，与西方比较成熟的市场相对比，中国市场发展起步晚，但发展速度非常快。在这样的环境中成长起来的中国消费者，适应市场的快速发展，意识相对超前，对新事物的接受度较高，信心十足，对消费品的诉求很高。在挑选商品的时候，他们在注重产品功能的同时，更加关注产品是否可以满足其生活方式和情感需求。其次，在中国经济和市场发展现状下，消费者需求的区别和层次偏多，这对于生活方式品牌来说，既是机遇又是挑战，产品是选择针对某一目标受众群体，还是使产品满足各层次消费者，是市场策略方面的一个命题。

那么作为来自国外的生活方式品牌，如何在这样发展快、层次丰富、竞争日益激烈的中国市场中保持优势、获得成功呢？我认为要做好三件事。

第一，也是最重要的，准确洞察消费者的需求和心理。作为充满灵感和感染力的国际化生活方式品牌，不仅要洞察消费者的需求，更要满足甚至引导消费者的需求。用我最熟悉的OLAY为例：1989年OLAY来到中国，作为进入中国市场的第一个国际护肤品牌，在消费者中顿时掀起轩然大波。那时中国的市场经济刚刚起步十年左右，消费者需求急切，OLAY以抗衰老产品主打，迅速成为家喻户晓的品牌。90年代初，OLAY根据研究消费者发现，亚洲女性消费者不仅对抗衰老护肤品存在需求，更对美白保有极高的兴趣和热情。所以，就此诞生的OLAY美白系列在中国市场诞生，并迅速取得成功。前几年，同样的创新带来了OLAY男士护肤领域的开拓，以满足亚洲男性消费者对护肤的注重与需求。这个来自美国的护肤品牌，在中国、亚洲市场准确洞察到了当地消费者的需求，并将美白和男士护肤方面的研发、设计等的重心设立在这里。

这也就谈到了成功关键的第二个要点：对全球化这个大趋势的正确理解。全球化不是将国外的品牌原样搬到中国，同样，本土化也不是将本土的元素直接生硬地附加在国际品牌之上。那么如何达到品牌本源的国际文化和本土化发展之间的平衡呢？这要依具体品牌而定 。 在品牌文化历史方面，要保有国际化的根源和传统，但是在理解消费者和市场思路方面，要将符合消费者需求的元素，从产品设计一开始就充分融入其中（而不是牵强地后期附加上去）。

第三，除了把这些基础工作做好之余，选择好的合作伙伴也非常重要。这个合作伙伴无论是媒体，还是市场传播公司，抑或是代言人、舆论倡导者，都需要精心选择。他们将帮助我们把关键信息、重要的品牌故事讲好，传达给消费者。

中国有句古话，叫“万变不离其宗”，这是现状，也是生活方式品牌在中国发展的未来。在瞬息万变的市场中，洞察消费者即是“宗”，满足并引领他们的需求，为他们的生活方式展示一种全新的可能和更美的画面，就是成功的关键所在。

还有值得一提的是，来自中国本土的品牌也将在未来发展中显示出越来越强劲的势头和竞争力，如今的“中国制造”也会逐渐转型为“中国创造”，这将增加国际品牌在中国的挑战，但更多的，这将推动整个产业的更快创新发展。

万事达卡与中国

万事达卡与中国

凌海，大中华区总裁，万事达卡国际组织

万事达卡在中国的发展

20多年前，万事达卡作为第一家国际信用卡支付品牌进入中国市场。至今，中国市场已经成为万事达卡最重要的海外市场之一。

万事达卡最初的品牌战略是向消费者与商业合作伙伴传授信用卡的相关知识-这种传统理念延续至今。通过这种知识普及，许多中国的银行开始看到信用卡发行的价值，同时，随着外商投资和国际旅客大量涌入中国，信用卡开始进入中国市场。1984年，北京香山饭店成为第一家授权接受万事达卡的商业单位。

万事达卡在中国的运营理念是以务实的态度奠定在中国市场基础，与发卡行和商户合作，介绍最新的技术，加强公众对信用卡优于现金的理念。最重要的是， 万事达卡立足中国，稳步寻求在中国的发展方向，用更适合中国国情的战略开拓市场，同时不吝惜对本土市场进行指导。尽管万事达卡推崇自由，公开的市场，但同时强调时机的重要性，而此时中国恰好拥有适当契机。因此，万事达卡一直寻求与中国国情相结合的运营机制——高速、便捷、安全与透明——并与政府政策保持一致。

同时，万事达卡一直强调“与现金做斗争”的概念。追溯到80年代初，中国市场的全部支付 均为现金支付， 至今，现金支付仍占所有支付方式的70%。与现金的战斗远比与其它信用卡公司竞争更为重要。虽然万事达卡进入中国后，消费者习惯有所改善，但是现金仍是支付界的王者。随着中层阶级的快速增长，持续增长的消费和更多的消费者选择——更多的高端产品与服务，娱乐，旅行，汽车，美酒和艺术——信用卡将变得更加流行。

中国消费者

在发卡行和商户的需求以外，消费者行为是万事达卡在中国大陆本土化战略的一个主要影响因素。除了语言本土化，环境是另一个方面——与中国消费者明显有关的文化环境。证明万事达卡对社区的贡献是很关键的，我们需要告诉大家万事达卡与中国社会是如何完美地融为一体。这一点与其用统计数字来衡量，不如看看万事达卡有多大程度融入到了富裕的和有抱负的社会群体的生活方式中。

中国大陆的中产阶级和富裕人群在不断壮大。根据波士顿咨询公司的研究，中国百万富翁的数量在2010年增长了31%达到了111万。中国现在是继美国和日本之后的第三大拥有最多百万富翁的国家。因此，中国大陆对境外旅游、留学、投资和商务的需求在不断增长。中国大陆现在是奢侈品消费的非常重要的市场。

品牌战略和知名度

自上世纪九十年代末以来，万事达卡无价体验的活动是其向持卡者提供独特而难忘体验的全球营销活动的一个里程碑，这些体验大多是无法用金钱买到的。而这个无价体验的活动也引起了中国富裕阶层的共鸣与响应。万事达卡目前正在用万事达人概念等活动来本土化它的这一全球无价体验活动战略。万事达人主要面向富裕的年轻消费者，结合无价体验和从会员到特殊俱乐部的形式。这一理念与万事达中心举办的各种赛事和演出完美结合，包括募捐和其它社区活动，从而点燃了年轻群体的激情。

2011年1月，万事达卡获得了五棵松体育馆（2008年北京奥运会时作为北京奥林匹克篮球馆）的冠名权。这一冠名活动彰显了其对中国大陆社会的长期贡献。万事达中心是第一个被商业化冠名的奥运场馆，这也再次表明万事达卡旨在

成为中国社区一份子的心愿。该场馆将与其它万事达卡的国际活动紧密相连。这座兼具豪华与现代化的场馆在今年已经举办过几场大型的音乐会，使万事达卡成为诸多活动的主办方包括一些国际上最知名人物的演出，例如老鹰乐队，郭富城个人演唱会和卡百利乐队。每场演出都会有社会媒体的宣传活动，在与各银行合作的同时还会针对每一场表演设置抽奖等不同寻常的有趣活动。

挑战

尽管在过去的25年里万事达卡在中国取得了成功并不断成长，但在中国仍然面临着很多挑战。

从技术的角度看，商人需要通过电话或传真的方式与海外联系获得授权的日子已经过去了。万事达卡运用最新的交易结算技术，确保了当地消费者的安全性，快捷性和方便性。而跨境交易由万事达卡直接转接。目前，万事达卡也在关注移动通信技术以及获取电子商务交易工具。

未来展望

万事达卡在中国的业务在不断扩大。它仍然侧重于取代现金交易且继续进步：　信用卡的使用迅速增长，同样电子商务和移动支付也是如此。更为重要的是，万事达卡需要提升自己的地位，而不仅仅只担当着交易解决方案供应商的角色——正如一家能够促进业务发展，致力服务于社会及个人的公司。万事达中心举办的“万事达人”活动，其观念和活动一直关注中国社会，而且将在未来几个月内势头大增。

打造"中国制造"品牌

打造“中国制造”品牌

向明，奇瑞量子市场部总监

在过去的近二十年间，我主持了很多品牌建设和市场传播的工作，这其中包括国际品牌在中国及其它国家的推广，也包括中国本土品牌的创造和建设。

在我看来，成功的品牌建设，会让品牌和它所关注的人群之间，发生一种化学反应。比如说，一位消费者去买牙膏，如果他只是为了刷牙而买牙膏，而不在乎具体哪个牌子，那么他和牙膏之间，就是单纯的物理反应；相反，如果他一定要挑选某个牌子的牙膏，那说明他和这个品牌之间，就已经发生了美妙的化学反应。

要实现这个化学反应，我们有很多工作要做，比如找到合适的“催化剂”，帮助加速和促进这个反应；还有，认识中国市场和中国消费者的特点也至关重要。

现阶段的中国市场和消费者存在一些独特之处，总体来说有大致三个特点。第一，在很多西方国家，中产阶级消费者是比较成熟的一个群体，他们有固定的消费习惯，对产品的需求比较清晰；而在中国市场，中产阶层处于一个正在发育的阶段，消费者对品牌形象更加看重，对品牌的精神诉求也日益增加。在一定程度上，品牌需要能够承载、代表他们对自己经济、社会地位的认知和期待。而品牌的形象、精神诉求等软实力，也往往正是某些不成功的中国品牌所缺失的东西。

其次，整体而言，中国消费者对于中国本土品牌，很多情况下存在一种普遍的信任危机。这并不代表消费者不爱国，你只要看一下各大国际体育赛事就知道了，中国球迷的助威呐喊和他们的痴迷程度，绝对都是发自肺腑的。但是一些本土品牌的用户体验欠佳，造成消费者对品牌的不信任。

盛世长城广告公司(Saatchi & Saatchi)的CEO发展了一条建立品牌忠诚度的真理：即在消费者心中，将品牌从一个“商标”(trademark)转化为一个“信任之标”(trust mark)，再升华为“喜爱之标”(love mark)的过程。在中国市场上，很多中国本土品牌还没能过“信任之标”这一关，就已经在急于追求“喜爱之标”了。

第三，中国消费者对口碑很看重。相比于常常言过其实的广告等付费媒体而言，消费者更愿意相信口口相传等免费媒体的宣传。

从这三个特点分析，中国本土品牌的成功的第一步在于建立消费者对品牌的信任。这个信任的基础即是质量。我所说的质量，既包括产品质量等硬实力，也包括服务等软实力，二者缺一不可。中国经济近三十年来的飞速发展，使得中国品牌在硬实力方面有了长足的进步，但是软实力的缺失也由此变得愈发明显。近年来发生的几次产品质量事件，从牛奶事件到高铁事故，都体现了软实力质量的缺失，因为我们高铁的技术是世界一流的，生产牛奶的设备也是先进的，但是“人”的元素没有做足。中国有句古话：做事先做人。要想成就事业，要先把“人”做好。因为“人”是品牌的载体，当大家了解了你的品牌背后是怎样的一群人在支撑，他们对你的信任度也就随之建立起来了。

中国古代兵法将“天时、地利、人和”视为打胜仗的三个要素，尤以“人”的因素最为重要，这个理论在今天的市场传播中仍是适用的。一个品牌的成功，除了对适当时机的选择（天时）和对市场需求的把控（地利）之外，品牌后面的“人”的因素是最重要的。

所以总结来说，在硬件质量过硬的基础上，修养软件的实力，从而建立信任度，并用软实力赋予品牌更多的精神诉求，让你的产品融入消费者的生活，这样的品牌即可在中国市场获得优良口碑，占领市场，甚至走向世界，寻求更广阔的发展空间。

而说到中国品牌走向国际，我觉得关键要在本土化和国际化之间找到你的品牌所需的平衡。比如香水品牌，可能会偏重于保持自己品牌的固有形象；而红酒的品牌，势必需要根据当地市场需求和消费者饮食习惯，作出一些本土化调整。

国际品牌进军中国市场也是一样的道理。以宝洁旗下帮宝适进入中国市场的著名案例为例：在品牌软实力方面，宝洁团队为产品赋予了符合中国市场的新含义。中国独生子女家庭居多，唯一的宝宝被寄予了全家人的希望和关爱，父母对他们的期待值很高。为此，帮宝适提出睡眠对于宝宝智力发育的重要性（并通过儿科医生这一催化剂，宣传睡眠的重要性），而帮宝适可帮助宝宝夜间睡眠更长久，更安稳，从而使宝宝更聪明更健康。与此同时，产品的硬实力要能够确保软实力的实现。帮宝适采用的AGM技术，确保纸尿裤的整夜干爽，从而实现品牌对消费者的许诺，产生可持续拥有的品牌区隔和溢价。

由此可见，市场推广要做的不仅是传播，更是在此之前对于品牌的建立。这个过程犹如生养一个孩子，不能拔苗助长，而要有长远的愿景和持久的爱心，这样，你的品牌才能存在于人们的生活中，而不是他们的银行账户上。在未来的日子里，越来越多的中国本土品牌将赢得中国消费者的信任和热爱，在它们当中，具有中国特色的品牌和赢得信任较快的品牌也许会先行一步走向国际舞台，去打动更多的消费者，为他们的生活带来更高品质的体验。

城市品牌形象和国际招商引资

城市品牌形象和国际招商引资

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关于中国城市的品牌形象，我的最早记忆可以追溯到上世纪八十年代中期,中国大陆沿海14个开放城市来到香港举行推介会，招商引资。那时候中国刚刚改革开放不久，沿海城市的对外推广，迅速带动了中国经济的快速发展。

在那之后的近三十年中，我目睹见证了中国城市品牌发展的历程。时至今日，仅香港一地，每年就迎来30个以上的省级部级招商会；除此以外，许多省市也在世界范围内举办招商推介会。这些活动主要由商务部、外交部、贸促会等有关部门主导，也正是他们的大力推动，这些洽谈推介会得以在世界范围内频繁举办，全面展示中国城市形象，也直接为内地企业与外商创造了许多签约的机会，促使中国成为今天的出口大国。

在我看来，除了肯定成果，我们更要清楚地洞察到挑战，才能在全球化的今天，不断提升中国及中国城市形象，以创造更大的商业和文化资产。

在日常工作中，我参加过很多类似的会议，包括广交会，9+2泛珠三角论坛、东北老工业基地、中国国际投资贸易洽谈会等。在过去的三十年中，中国经济处于飞速发展期，GDP平均每五年翻一番；而今天，我们已经达到了一定的规模，增幅势必变缓。当一个经济体从最初阶段发展到成熟期，也会自然产生一些变化，以求更大的发展空间。那么中国的众多省市，在建立自己生长空间的同时，如何不断寻求新的增长点？这是一个挑战。

举一个最简单的例子，如果我们在世界最大的买家——美国，随便询问一位消费者：你对呼和浩特这个城市了解多少？他肯定需要在谷歌上查好长时间，才能稍微了解一二。当中国作为一个整体印象，逐渐形成并日趋深刻的同时，中国的众多城市面临的挑战即是：如何拥有属于自己的品牌和与众不同的形象？

在我看来，就城市品牌而言，中国有两类城市，要分别看待。

第一类城市，如北京、上海等，已经具有属于自己的强烈色彩，独一无二，不可复制。北京，是中国的政治、文化中心，紫禁城的垂柳、水立方的清秀，北京见证了中国几千年的风起云涌；上海，是中国的经济、金融中心，国际胸怀兼具中华风韵。这些城市，已经具备了成熟的品牌形象，无论对国际游客抑或是投资者，都充满吸引力和说服力。在国际贸易合作方面，它们不仅要“引进来”，还要“走出去”。

第二类城市，比如大多数中国二、三线城市，对于“买家”而言，没有明确的品牌形象甚至印象。这一类城市，依我看来，不能急于招商引资，而是要先重新发掘、认识自己，然后在国际平台上广交朋友。这是中国式的“磨刀不误砍柴工”的策略。

我们可以以哈尔滨这个城市为例具体分析。提起哈尔滨，很多人的印象可能都只限于每年一度的冰雪节。但是一年有12个月，除了冰雪节以外，这个城市的特色何在？从体育赛事角度讲，这个冬季冰雪覆盖、夏季清凉怡人的城市，可以举办冬季冰球联赛和夏季马拉松等国际赛事，邀请全球体育界及媒体的朋友前来，在比赛之余，一览哈尔滨的风采。从文化、历史资产的角度看，哈尔滨也是一座独具特色的城市。由于地理位置的关系，哈尔滨深受前苏联的影响，在艺术、文化、宗教等方面留有浓重的前苏联色彩，其中始建于二十世纪初、沙俄修建的随军教堂索菲亚大教堂，是目前中国保存最完美的典型拜占庭式建筑。除此以外，哈尔滨保藏了大量前苏联的“红色油画”，作为历史的鉴证和鲜为人知的艺术品，具有极高的艺术价值和潜力。同样

与前苏联影响相关，1985年以前，哈尔滨曾经居住着两万多名犹太人，他们形成了哈尔滨历史文化上特殊的一个篇章。岁月更迭，当我们以今天的视角重新审视、保护、发扬哈尔滨的历史、文化资产时，如何让它们以新的形式获得新生？比如，我觉得如果可以与俄罗斯方面合作，沿火车线路开发整体主题旅游项目，让哈尔滨成为研究相关艺术、文化的必经之路，从而让更多的人来到哈尔滨，更深刻地看到它的历史与今天。这些针对哈尔滨独有的历史资产而产生的想法，足以发展为每年10个左右的国际交流项目。这些项目的开展，将吸引大量的中外游客，这些来自各个领域、各个国家的客人，将对哈尔滨产生鲜明的印象，在某一方面或多方面产生情感共鸣。这就是我说的第一步：交朋友。这一步，需要长期的积淀与培养，是双方建立信任、产生联系的重要基石，而在此过程中形成的城市形象，正是长远招商引资的前提和基础。

古人云“知己知彼，百战不殆”。像哈尔滨一样，每个城市都有属于自己的故事，作为初期主导力量的政府，应该对不断发展的城市作出质的评估，看清自己、表达自己；其次要了解买方需求。此为知己知彼，也是城市品牌应达到的境界。

而关于城市品牌的未来趋势，我的回答是：应变。因为没有人手里拿着预知未来的水晶球。为了生存，我们必须学会改变，因为我们的消费者在改变，周围环境也在改变，尤其是今天瞬息万变的中国，我们的城市需要对着一面镜子，像审视一位久违的老朋友一样，仔细看看这个崭新的自己。

中国的奢侈品牌

中国的奢侈品牌

陈家岳，嘉里建设（中国）有限公司董事

陈家岳对中国奢侈品牌的深入了解，来自于他在香港和中国内地的房地产开发领域积累的数十年经验，在这些年间，他与合作的奢侈零售品牌建立了往来关系，并深知中国消费者所寻求的奢侈品体验。作为嘉里建设（中国）有限公司的总监，他目前正在负责静安嘉里中心的商业规划，静安嘉里中心是位于上海中心商业区核心地段的综合多用途开发项目，计划于 2012 年竣工。

中国的奢侈品牌有哪些不同？

这要从中国的消费者谈起。除了北京和上海等国际中心外，大多数奢侈品消费来自卫星城和制造业城镇。这些消费者在很大程度上仍停留在了解奢侈品牌的阶段。他们往往容易受外界影响，随波逐流，而不是引领时尚。这种特点的消费者仍将奢侈品与价格相连，这表示，在他们看来，高价格就等于奢侈品。对大多数中国消费者而言，还有一点很重要：品牌的知名度和存在性。从包装就能看出：越夸张、越醒目，就越好。

不过我要承认，中国的奢侈品消费者正在转变。作为开发商，我们在工作中始终展望未来。我们预测消费者行为的变化，并以此构建未来。

中国的奢侈品消费者正在如何转变？

这种转变在上海等国际中心尤为明显。可以说，这里的消费者更趋向于把奢侈品牌当作自身个性和风格的体现，在选择时辨别力更强。越来越多的中国消费者前往欧洲和其他地方旅行，在这些地方，他们能够见识国际奢侈品牌，在其他市场对这些品牌的所见所闻令他们更加成熟。

奢侈品牌对这种趋势有不同的反应。一些品牌仍不确定消费者的转变速度。在房地产开发中，一旦我们承诺建造项目，尽管我们知道完成项目需要一段时间，我们也会投入其中并见证我们的预言成为现实。因此，我们致力于引导这种趋势，并相信中国的消费者将日益成熟，在选择奢侈品时更有远见。

中国奢侈品牌的零售店环境如何？存在哪些趋势？

旗舰店是奢侈品牌在中国发展的重要工具。这些店铺的规模正不断扩大，部分原因是产品种类和零售价都在不断增加。较为成功的品牌正在中国丰富其产品种类，配件品牌开始销售服装，而服装品牌也会出售配件。配件仍然非常重要，因为礼品馈赠是中国奢侈品销售的主要驱动因素。一些奢侈品牌非常反对将其顶级产品与二三线产品一起售卖，但有些品牌在预测到市场有这种需求后，便会灵活处理。这些品牌会建造多层店铺，两到三层楼高，以满足这种需求，又能区分其一二线产品。

根据店铺的规模，正面可能有三或四层楼高，外观很重要，品牌会聘请全球最好的设计师打造耳目一新的外观，所以店铺设计更新得越来越快。在内部留出更多空间，改善消费者的购物感受：商品不再拥挤摆放，价格清楚标明，店员减少了“强行推销”。

奢侈品牌还将店铺视作展现品牌生活方式的地点。有些在店铺内设立著名咖啡店。在年轻消费者中，明显兴起了一股为自己的苹果、iPhone 和 iPad 产品购买配件的潮流，因此在这些店铺中，你能看到奢侈品牌为迎合这种趋势而推出的许多商品。

哪些进入中国的国际奢侈品牌特别成功？

Louis Vuitton、Gucci 和 Chanel 等比较传统的欧洲奢侈品牌做得不错，因为它们有明确的定位。不太成功的品牌都是由于没能清楚规划如何管理自身定位，包括与价格和风格有关的定

位。Ralph Lauren 虽然成功，但在中国不如其他奢侈品牌形象清晰。一般，欧洲品牌因为其历史比美国品牌悠久，所以在中国消费者中的定位和营销更加成功。总体而言，奢侈品牌的趋势是经典又不失前瞻性，以及以设计师的名字命名：例如，AlexanderMcQueen、MarcJacobs、Michael Kors、Paul Smith 和 Tom Ford。

在中国打造奢侈品牌的一些最成功的策略有哪些？

再次从旗舰店说起：它们很关键。其次，随着信息量和消费者使用大幅增加，品牌对互联网的依赖性越来越强。此外，应更加重视公共关系，包括选择的合作品牌。现在，首次巡演纷纷选择在中国举办。不仅只有纽约和巴黎：上海和北京等城市也正像其他市场一样，成为发布新品的重要舞台。

未来五年，在中国的奢侈品牌会有哪些不同？

正如我之前所说，设计师品牌将更加引人关注，店铺将继续增加。与此同时，奢侈品牌需要采取措施保护其形象，同步提升客户服务与商品种类；它们不能只是期待每年都以相同的幅度增长。品牌选择会更多，也会有更多有能力做出选择的消费者。对我而言，预测人口变化和消费者变得更加成熟的方式很有意思。随着在婴儿潮时代出生的人变老，品牌将目光投向能快速积累大量财富的“30 至 35 岁”人士，或者是来自制造业城镇的人士。奢侈品消费者将不单单只需要一个手袋。他们对奢侈品的渴求将扩展至酒店、度假、体验。

从开发商的角度，我认为成功最重要的秘诀是实现内容的绝妙搭配，在奢侈品和平易近人一点的产品之间良好平衡，为更丰富的生活方式提供服务，以及吸纳前瞻性的趋势和品牌。这是购物中心自己的观点，能帮助它在市场上脱颖而出，不像其他商场一样千篇一律地经营。

对于房地产开发品牌，和对于奢侈品牌一样，这确实是最基本的要素，在中国和其他地方：清楚自己的定位，彰显真实、与众不同的自我。

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JACK MORTON IS PROUD TO BE PART OF THE INTERPUBLIC GROUP OF COMPANIES' COLLABORATIVE AGENCY NETWORK THAT HELPS CLIENTS BUILD STRONG BRANDS IN AND OUT OF CHINA.

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