

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The fast fashion market is slowing down. Meanwhile, shoppers are demanding better quality products and customer service. They are also demanding more individual styles to suit diversifying tastes. Competition is intensifying, but online retail is providing new ways to reach more consumers in untapped regions that chains haven't reached."

- Matthew Crabbe, Director of Research, Asia-

This report looks at the following areas:

- Young and Funky versus Conservatives
- Embracing online
- Individualism

This Report covers how the fast fashion retail market has grown rapidly, and is seeing increasing competition drive greater innovation to capture customer interest.

It investigates how consumers are becoming more demanding of product and service quality, as well as more individualistic in their tastes, and how retailers are responding to this shift in innovative new ways.

It also looks at how important integration of online and offline channels has become in gaining consumer interest, offering value for money and improving customer experience.

The Report also looks at different consumer groups, and how they buy different products and seek out different styles of clothes to make their own look.

The Report also looks at what key factors motivate shoppers when they are looking for products, and what the key criteria are for their choice of fast fashion brand.

Finally, the Report looks at consumer attitudes towards fast fashion, how they feel they are served well, and where retailers need to work harder to gain their loyalty.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

^{China} +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Products/themes covered in this Report

Executive Summary

The market

Figure 1: China - Fast fashion retailing total market value, 2011-21

Companies and brands

Figure 2: China – Fast fashion top 10 retailers' share of market value, 2014 and 2015

The consumer

Choice of style

Figure 3: Consumer choice of words to describe clothes they like to wear, April 2016

Types of clothes bought

Figure 4: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, April 2016

Shopping preferences

Figure 5: Consumer shopping preferences when buying fast fashion, April 2016

Shopping motives

Figure 6: Key consumer motives for fast fashion shopping, April 2016

Brand choice

Figure 7: Factors influencing consumer brand choice of fast fashion retailer, April 2016

Consumer attitudes

Figure 8: Consumer attitudes towards fast fashion shopping, April 2016

What we think

Issues and Insights

Young and Funky versus Conservatives
The facts
The implications
Embracing online
The facts
The implications
Individualism
The facts
The implications

The Market – What You Need to Know

Fast fashion in the past; slower fashion in the future

Still significant room for growth

Market Size and Forecast

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Introduction

Figure 9: China - Fast fashion retailing total market value, 2011-21

Market Drivers

Trading up

Figure 10: Percentage of rural households, by net household income level, and percentage change, 2005-12

Spread into lower tier cities

- Figure 11: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, by city, April 2016
- Figure 12: Consumer choice of words to describe clothes they like to wear, by ostentatious words of expression, by city, April 2016
- Figure 13: Consumer choice of words to describe clothes they like to wear, by conservative words of expression, by city, April 2016

Online retail

Figure 14: China – Online retail sales, by broad product category, 2011-15

Figure 15: China – Online fashion retail sales value compared with total fashion retail, 2011-15

Key Players – What You Need to Know

Competition leading to greater consolidation

Diversity and individuality

Market Share

Leading company share by value

Figure 16: China – Fast fashion top 10 retailers' share of market value, 2014 and 2015

Leading retailers' network footprint

Figure 17: China – Selected leading fast fashion retailers' number of outlets and average sales per store, 2014 and 2015

Competitive Strategies

Mix and match "formasual"

Figure 18: Heilan Home - Operating income and gross profit margin, 2014 & H1 2015

Fixating on youth

Normcore

Geek chic

The "his and her" look

Loyalty programmes and mobile payments

The Consumer – What You Need to Know

Choosing a style

What people wear

The online/offline split

Quality and style are inseparable

Individuality, individuality, individuality!

Rising style-consciousness

Choice of Style

The rise of the individual

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Consumer choice of words to describe clothes they like to wear, April 2016

Figure 20: Types of menswear consumers prefer to wear, January 2016

Young and Funky

Figure 21: Consumer choice of words to describe clothes they like to wear, by "Young and Funky" consumers, April 2016

Figure 22: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, by Young and Funky consumers, April 2016

Figure 23: Consumer attitudes towards fast fashion shopping, by key consumer groups, April 2016

Figure 24: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, by Young and Funky consumers, April 2016

Types of Clothes Bought

What people wear

Figure 25: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, April 2016

Figure 26: Types of menswear products bought by consumers, January 2016 & June 2014

Figure 27: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, by gender and age, April 2016

Figure 28: Types of clothes bought by shoppers from fast fashion retailers in the past 12 months, by factors influencing fast fashion brand shopping choice, April 2016

Shopping Preferences

Quality, style, service and trust

Figure 29: Consumer shopping preferences when buying fast fashion, April 2016

Quality

Figure 30: Consumer shopping quality preferences when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016

Service

Figure 31: Consumer shopping service preferences when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016

Style

Figure 32: Consumer shopping style preferences (A) when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016 Figure 33: Consumer shopping style preferences (B) when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016 Figure 34: Consumer shopping style preferences (C) when buying fast fashion, by key consumer motives for fast fashion shopping,

April 2016 Trust

Figure 35: Consumer shopping trust preferences (A) when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016 Figure 36: Consumer shopping trust preferences (B) when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016 Figure 37: Consumer shopping trust preferences (C) when buying fast fashion, by key consumer motives for fast fashion shopping, April 2016

Shopping Motives

Giving shoppers time and space to shop

Figure 38: Key consumer motives for fast fashion shopping, April 2016

Figure 39: Key consumer motives for menswear shopping, January 2016

Men shop for quality, women shop for style

Figure 40: Key consumer motives for fast fashion shopping, by gender and age, April 2016

Following the trends

Figure 41: Key consumer motives for fast fashion shopping, by factors influencing consumer brand choice of fast fashion retailer (A), April 2016

More personal shopping motives

Figure 42: Key consumer motives for fast fashion shopping, by factors influencing consumer brand choice of fast fashion retailer (B), April 2016

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand Choice

The rise of the individual

Figure 43: Factors influencing consumer brand choice of fast fashion retailer, April 2016

Individuality across all ages

Figure 44: Factors influencing consumer brand choice of fast fashion retailer, by gender and age, April 2016

Price sensitivity still lingers

Figure 45: Factors influencing consumer brand choice of fast fashion retailer, by positive consumer attitudes towards fast fashion shopping (A), April 2016

Individualism on a budget

Figure 46: Factors influencing consumer brand choice of fast fashion retailer, by positive consumer attitudes towards fast fashion shopping (B), April 2016

Consumer Attitudes

The urge to "dress to express"

Figure 47: Consumer attitudes towards fast fashion shopping, April 2016

Attitudes by demographic

Figure 48: Consumer attitudes towards fast fashion shopping, by gender and age, April 2016

Attitudes of the Young and Funky consumers

Figure 49: Consumer attitudes towards fast fashion shopping, by consumer choice of words to describe clothes they like to wear, April 2016

Appendix – Market Size and Forecast

Figure 50: China – Fast fashion total market value, 2011-21

Appendix – Methodology and Definitions

Methodology

Fan chart forecast

Abbreviations

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com