

Cultural and Creative Products Retailing - China - May 2019

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- Sell dreams, not products
- Tangible culture and fun
- Emotional connection with entertainment IP merchandise

In cultural and creative products retailing we are seeing great potential and opportunity as Chinese consumers look for intellectual challenge and entertainment in their leisure time. The boundary of traditional retailing is vanishing as cultural and creative venues are providing a relaxing and entertaining spaces for culture, art, and shopping.



“The only limit is your imagination. In cultural and creative product retailing we are seeing great potential and opportunity as Chinese consumers look for intellectual challenge and entertainment in their leisure time.”

- Chih-yuan Wang, Category Director, Retail, China

Buy this report now

Visit store.mintel.com

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



Report Price: £3695 | \$4995 | €4400

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
- Covered in this Report

EXECUTIVE SUMMARY

- **The market**
- **The culture and related industries are worth RMB 8,925 billion, growing at 8.2% in 2018**
 Figure 1: Market size of culture and related industries, China 2015-18
 Figure 2: The revenue of culture and related industries by types in 2018
- **Key drivers**
- **Chinese government committed to supporting cultural and creative industries**
- **The booming of cultural facilities and the content industry**
 Figure 3: number of cultural facilities
 Figure 4: visitors of cultural facilities
- **IP fever and the commercialisation of IP**
- **Three noteworthy players**
- **Revival of traditional culture - The Palace Museum故宫博物院**
- **The balance of content and commerce - Yitiao一条**
- **Fulfilling the needs of the 'third space' - Yanjiyou言几又**
- **The consumer**
- **Café, libraries, and bookstores are the centre of cultural and creative leisure lifestyle**
 Figure 5: Changes in visiting cultural venues in the last six months, February 2019
- **Cultural and creative industry has great potential in lower tier cities**
 Figure 6: Changes in visiting cultural venues in the last six months, % of visiting more, by city tier, February 2019
- **Cultural and art lovers are more about individual characteristics and personal interest instead of income and city**
 Figure 7: Contact with cultural and creative industries - CHAID - Tree output, Feb 2019
- **No clear winner and half of respondents do not even have any favourite IP**
 Figure 8: Top 15 favourite IPs, February 2019
- **Films and novels have more say in popular IPs**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

Figure 9: Sources of knowing favourite IP for the first time, February 2019

- Strong bonding between favourite IPs and IP merchandising**

Figure 10: Purchase of products that have been marketed with favourite IP, February 2019

- Married consumers with children have interest in buying IP merchandise**

Figure 11: Purchase of ip products, by family structure

- IP merchandise has to build the emotional connection to appeal young adults**

Figure 12: Purchase of ip products, by age groups

- What we think**

ISSUES AND INSIGHTS

- Sell dreams, not products**
- The facts**
- The implications**
- Tangible culture and fun**
- The facts**
- The implications**
- Emotional connection with entertainment IP merchandise**
- The facts**
- The implications**

MARKET OVERVIEW

- The culture and related industries are RMB 8925 billion business, growing at 8.2% in 2018**

Figure 13: The increase of total revenue of culture and related industries

Figure 14: The revenue of culture and related industries by types in 2018

- Key drivers**
- Chinese government is committed to supporting cultural and creative industries**
- The booming of cultural facilities and the content industry**

Figure 15: number of cultural facilities, 2013 and 2017

Figure 16: visitors of cultural facilities, 2013 and 2017

Figure 17: number of films, tv series, books 2013-17

- IP fever and the commercialisation of IP**

Figure 18: Number of exhibitors at china licensing expo 2014-18

Figure 19: the collaboration of heytea and pechoin

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

THREE NOTEWORTHY PLAYERS

- **Revival of traditional culture - The Palace Museum** 故宫博物院
院
- **Fun and creativity**
Figure 20: fun posts of the Palace Museum
- **History and entertainment**
Figure 21: Masters in The Forbidden City and Shang Xin Le Gu Gong
- **New Retail in merchandising**
- **The balance of content and commerce - Yitiao** 一条
- **Treat e-commerce content like media content**
Figure 22: Yitiao online store
- **New retail lifestyle store**
Figure 23: Yitiao lifestyle store
- **Fulfilling the needs of the 'third space' - Yanjiyou** 言几又
- **Bookstore as recreational and social space**
- **Art and Cultural Centre**
Figure 24: Yanjiyou flagship store Xian

THE CONSUMER - WHAT YOU NEED TO KNOW

- **Café, libraries, and bookstores are the centre of cultural and creative leisure lifestyle**
- **Going to the cinema is the most popular cultural activity**
- **Beautiful interior design is a must for young consumers**
- **No clear winner in popular IP (intellectual property)**
- **Films and novels are popular sources of IPs**
- **Challenge and potential of entertainment IP merchandising**

TRENDS IN ENGAGING IN CULTURAL AND CREATIVE ACTIVITIES

- **Emerging leisure and physical activity culture encourages Chinese consumers to go outside**
- **Café, libraries, and bookstores are the centre of cultural and creative leisure lifestyles**
Figure 25: Changes in visiting cultural venues in the last six months, February 2019
- **Great potential in lower tier cities**
Figure 26: Changes in visiting cultural venues in the last six months, % of visiting more, by city tier, February 2019
- **Family is the next big thing**
- **Marketing to single people**
Figure 27: Changes in visiting cultural venues in the last six months, % of visiting more, by family type, February 2019

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

SPENDING IN CULTURAL AND CREATIVE PRODUCTS/SERVICES

- Going to the cinema is the most popular cultural activity**
 Figure 28: Purchased cultural and creative products or services in the last six months, February 2019
- Paper books/magazines and e-books/magazines are not mutually exclusive**
 Figure 29: Purchased cultural and creative products or services in the last six months, by selected spenders, February 2019
- Young adults still enjoy reading paper books**
 Figure 30: Purchased Cultural and Creative products or services, by age groups, February 2019
- Culture aficionados enjoy hands-on immersive cultural experience**
 Figure 31: Cross Table of Purchased Cultural and Creative products or services, by selected spenders
- Family with children are more into cultural and creative activities and products**
 Figure 32: Purchased Cultural and Creative products or services, by family structure
- Cultural and art lovers are more about individual characteristics and personal interest instead of income and city**
 Figure 33: Contact with cultural and creative industries – CHAID – Tree output, Feb 2019

ENCOURAGING STORE FEATURES

- Products still come first**
 Figure 34: Features that encourage visits to a new store, February 2019
- Younger consumers find beautiful interior design as necessity**
- In-store Chinese culture elements appeal to older consumers**
 Figure 35: The ranking of important new stores features, by age groups, February 2019

FAVOURITE IPS

- No clear winner and half of respondents do not even have any favourite IP**
 Figure 36: Top 15 favourite IPs, February 2019
 Figure 37: Types of favourite IPs, coded and classified from open-ended answers, February 2019
- Young adults are more into IP fever**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £3695 | \$4995 | €4400

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

Figure 38: Knowledge of IP, February 2019

Figure 39: Types of favourite IPs, coded and classified from open-ended answers, by age groups, February 2019

- **Chinese IP is gaining the upper hand**

Figure 40: Popular ips, by age groups

Figure 41: popular ips, by family structure

Figure 42: popular ips, by city

SOURCES OF KNOWING FAVOURITE IPS

- **Films and novels have more say in popular IPs**

Figure 43: Sources of knowing favourite IP for the first time, February 2019

- **Men prefer movies and animation while TV dramas and social media are more popular among women**

Figure 44: sources of popular ips – gender

- **IP market is so fragmented that it is hard to build a long-lasting IP**

PURCHASE OF FAVOURITE IP MERCHANDISE

- **Strong bonding between favourite IPs and IP merchandising**

Figure 45: Purchase of products that have been marketed with favourite IP, February 2019

- **Households with child(ren) have interest in buying IP merchandise**

- **IP merchandise has to build the emotional connection to appeal to young adults**

MEET THE MINTROPOLITANS

- **Mintropolitans are the target consumers for cultural and creative retailing**

Figure 46: Changes in visiting cultural venues in the last six months, % of visiting more, by consumer classification, February 2019

Figure 47: Purchased Cultural and Creative products or services in the last six months, by consumer classification, February 2019

Figure 48: Types of Purchased Cultural and Creative products or services, by consumer classification

- **Mintropolitans are big fans of the IP trend and they are willing to pay for their favourite IPs**

Figure 49: Knowledge of IP, by consumer classification

Figure 50: Types of favourite IPs, by consumer classification

Figure 51: Purchase of ip products, by consumer classification

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.