

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:

- Sustainability: an add-on statement rather than main selling point
- Build a personal connection with consumers
- · How to solve the pain point in fashion gifting

Meanwhile, consumers now also have higher expectations in every aspect of fashion, from quality, style-matching, to brand value and brand message. Mintel has also noticed that the online shopping platforms are transforming from being a channel to an integrated source of fashion. They have become a one-stop place that consumers can gather fashion information, find fashion inspirations, read reviews and make the final purchase."



"Chinese urbanities are quickly evolving into fashion-conscious consumers that want to look well-dressed and express their individuality, including when they are in sportswear. The athleisure trend is not expected to die down in the near future, although it has been on trend for years."

- Summer Xia, Research Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +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
- Excluded

EXECUTIVE SUMMARY

- The market
- Companies and brands
- The consumer
- Casual wears for adults and trainers for children

Figure 1: Fashion products bought, August 2019

 Comprehensive online shopping websites top the list Figure 2: Purchase channel, August 2019

· Quality comes before style and price

Figure 3: What consumers have done before purchase, August 2019

 Premium fashion brands feeling the squeeze from fast fashion and luxury brands

Figure 4: Correspondence Analysis – Brand Image, August 2019

- Consumers seek fashion inspiration from where they shop Figure 5: Place to find fashion inspiration, August 2019
- About a third surveyed consumers are fashion enthusiasts
 Figure 6: Enthusiastic in fashion and fashion products, August 2019
- What we think

ISSUES AND INSIGHTS

- Sustainability: an add-on statement rather than main selling point
- The facts
- The implications
- Build a personal connection with consumers
- The facts
- The implications
- How to solve the pain point in fashion gifting
- The facts
- The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Stable market growth
- Favourable macro and micro factors

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.

	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.



Apparel outperforms

MARKET SIZE AND FORECAST

Introduction

Figure 7: Best- and worst-case forecast of China's fashion retailing market value, 2014-24

MARKET FACTORS

Disposable income continues to increase

Figure 8: Real growth of per capita disposable income and expenditure, by urban and rural China, 20171Q-2019 3Q

- Opportunities in lower tier cities
- Per capita clothing expenditure stabilized

Figure 9: YOY growth rate of per capita clothing expenditure, 2015-3Q 2019

Looking well-dressed is a necessity

Figure 10: Attitudes towards dress up, August 2019

MARKET SEGMENTATION

- Apparel
- Footwear
- Accessories

KEY PLAYERS – WHAT YOU NEED TO KNOW

- Fast fashion experienced turbulence
- Let products and shopping experience speak for brands
- When culture meets fashion

MARKET SHARE

Highly fragmented market

Figure 11: Market share, November 2019

- · Sports brands still hold the lead
- Fast fashion brands facing challenges

Figure 12: ZARA's edited collection, October 2019

· Luxury brands are doing really well

COMPETITIVE STRATEGIES

Unleash the potential of niche audiences
 Figure 13: ASOS' clothing tab on landing page, October 2019

- Brands have to raise their own voice
- · Lifetime warranty to win trust

WHO'S INNOVATING?

Material Story

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.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

Report Price: £3695 | \$4995 | €4400

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



Carbone-neutral sole

Figure 14: Introduction of allbirds' SweetFoam™

• Wash it, hang it, wear it

Figure 15: Ermenegildo zegna's TECHMERINO™ collection

· League of Legend and Louis Vuitton

Figure 16: Prestige skin designed by Louis Vuitton for Qiyana, November 2019

- Embroid culture into fast fashion
- H&M worked with local designer

Figure 17: H&M x Angel Chen, November 2019

· Fast fashion meet ethnic minority

Figure 18: Uniqlo and Miao embroidery, November 2019

THE CONSUMER - WHAT YOU NEED TO KNOW

- Women purchased more, especially for handbags and fashion accessories
- Outlets have great potential among males and high earners
- Trend pursuing younger consumers
- Ethical and authentic are not closely related to any brand type
- High earners get inspired by fashion shows and daigou
- New format and service model are well accepted

FASHION PRODUCTS BOUGHT

Athleisure still rocks

Figure 19: Fashion products bought, for myself, August 2019

· Accessories are women's best friends

Figure 20: Fashion products bought, for myself, by gender, August 2019

Chinese parents are not ready for children fashion accessories yet

Figure 21: Fashion products bought, for children, August 2019

Fashion purchase for partners is common

Figure 22: Fashion products bought, for adults with different gender, by gender, August 2019

Figure 23: Purchase of men's fashion products by gender, August 2019

Figure 24: Purchase of women's fashion products by gender, August 2019

Figure 25: Fashion products bought, for children, August 2019

Formal wear is more essential in tier one cities

Figure 26: Fashion products bought, for myself, by city tiers, August 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.

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.



· Fashion accessories work in different ways across city tiers

Figure 27: Fashion products bought, fashion accessories, by city tiers, August 2019

Help younger consumers explore their styles

Figure 28: Fashion products bought, for myself, by generation, August 2019

Figure 29: Fashion products bought, for others with different gender, by generation, August 2019

PURCHASE CHANNEL

 Online comprehensive shopping websites are the first place to go

Figure 30: Purchase channel, August 2019

Men are attracted to good bargains

Figure 31: Purchase channel, by gender, August 2019

· Brands means more to young consumes

Figure 32: Purchase channel, by generation, August 2019

High earners enjoy shopping in outlets and leveraging overseas channels

Figure 33: Purchase channel, by monthly personal income, August 2019

PURCHASE JOURNEY

Finding the right fashion product is priority

Figure 34: What consumers have done before purchase, August 2019

- Omnichannel strategy has seen early success
- Women care about style matching

Figure 35: What consumers have done before purchase, by gender, August 2019

Younger generation believe in peers and professional

Figure 36: What consumers have done before purchase, August 2019

Low earners have more straightforward decision making process

Figure 37: What consumers have done before purchase, August 2019

BRAND IMAGE

· Fast fashion stay on-trend

Figure 38: Correspondence Analysis – Brand Image, August 2019

Figure 39: Correspondence Analysis – Brand image, August 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.

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.



Unclear path for premium brands to expand

- Aspirational luxury brands sit tight on the top of the hierarchy
- Ethical is not strongly correlated to any brand types

WHERE TO FIND FASHION INSPIRATIONS

The influence of online shopping platforms is beyond buying products

Figure 40: Place to find fashion inspiration, August 2019

· Brands' official accounts are worth investing in

Figure 41: Place to find fashion inspiration - TURF Analysis - August 2019

Women are more into the celebrity and fashion specialised
sources

Figure 42: Place to find fashion inspiration, by gender, August 2019

Social media is crucial to the post-90s

Figure 43: Place to find fashion inspiration, by generation, August 2019

Low income consumers are less sensitive to fashion trends

Figure 44: Place to find fashion inspiration, by monthly personal income, August 2019

ATTITUDES TOWARDS FASHION

Well-dress to reflect individuality

Figure 45: Attitudes towards dressing up, August 2019

Athleisure still has room to grow

Figure 46: Attitudes towards casual wear and sportswear, August 2019

Interested in trying the new format and service model

Figure 47: Attitudes towards new format and service model, August 2019

· High enthusiastic in fashion

Figure 48: Enthusiastic in fashion and fashion products, August 2019

- Fashion Junkies vs normal consumers
- Buying more from the official channel and overseas

Figure 49: Purchase channel, by fashion enthusiasts vs normal consumers, August 2019

· Care more about every aspect except for price

Figure 50: What consumers have done before purchase, August 2019

Social-media savvy

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.

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





Figure 51: Place to find fashion inspiration, fashion enthusiasts vs normal consumers, August 2019

MEET THE MINTROPOLITANS

· Trend, matching and review matter most

Figure 52: What consumers have done before purchase, MinTs vs Non-MinTs, August 2019

Want to be the first to know

Figure 53: Place to find fashion inspiration, by generation, August 2019

More aware of the fashion trends and follow suit quickly

Figure 54: Attitudes towards fashion, by MinTs vs non-MinTs, August 2019

APPENDIX - MARKET SIZE AND FORECAST

Figure 55: Value sales for Fashion Retailing

APPENDIX - MARKET SEGMENTATION

Figure 56: Market value of fashion retailing, by market segments, China, 2014-19

APPENDIX - METHODOLOGY AND ABBREVIATIONS

- Methodology
- Fan chart forecast
- Correspondence analysis
- 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.

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.