

Report Price: £3302.97 | \$4460.00 | €3717.16

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



"KOL marketing is particularly strong; however there is no exact definition of what a fashion influencer is. The secret behind the success of KOL marketing is trust, and the marketing form only exists because consumers trust key opinion leaders. For KOLs to stay relevant in the industry, authenticity, integrity, trust and added value are still key."

- Xinyuan Xu, Research Analyst

# This report looks at the following areas:

- Key Opinion Leaders in selling or influencing
- Blurring industry expertise in the KOL industry
- Fashion marketing to men

KOL commerce has been a popular way for brands to promote their products for a while now and, as it has become a particularly notable form of marketing in China, consumers want more connection and trust than ever. This specialist type of promotion is evolving to include more expertise as to product information, purchase channels, and building long term trust.

This Report covers consumers' preferences towards different types of influencers in the fashion industry, their viewing platforms, viewing frequencies and the content they are interested in. This Report also discusses consumers' interactive engagements with influencers and how influencers could impact consumers' fashion purchase consideration. Focusing on the key pain points in the purchase process fashion influencers have the most impact on, this Report provides brands with new perspectives to build effective influencer marketing strategies.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

+1 (312) 943 5250

+86 (21) 6032 7300

+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: £3302.97 | \$4460.00 | €3717.16

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

Figure 1: Short, medium and long-term impact of COVID-19 on fashion influencer, November 2020

# The consumer

Figure 2: Interaction with KOLs in the past 6 months, September 2020

#### Fashion trends key in 2020

Figure 3: Shopping stages affected by KOLs during purchase journey, September 2020

## Douyin tops KOL influencers

Figure 4: Platform of KOL engagement in the last six months, September 2020

## KOLs' proven success in non-luxury purchases

Figure 5: Influencer and purchase decisions, September 2020

#### Professionalism from fashion KOLs desired

Figure 6: Desired content from KOLs, September 2020

# Increasing expectations towards fashion influencers

Figure 7: Attitude towards fashion influencers, September 2020

What we think

# **Issues and Insights**

Key Opinion Leaders in selling or influencing

The facts

The implications

Blurring industry expertise in the KOL industry

The facts

The implications

Fashion marketing to men

The facts

The implications

# The Consumer - What You Need to Know

One third of consumers have leveraged fashion KOLs' channels

Gender differences in what fashion KOLs need to provide

Building a balance between marketing campaigns and trust

# **Favourite Fashion KOL**

# Food and drink drive the most traffic in the KOL ecosystem

Figure 8: Types of influencer followed on social media, September 2020

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 | **EMAIL:** reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

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

#### Fragmented market with blurring of expertise

Figure 9: Word cloud of favourite fashion KOLs, September 2020

Figure 10: Favourite fashion KOL, September 2020

## **Interactive Engagement**

# Nearly one in three have made a purchase in response to an influencer's post

Figure 11: Interaction with KOLs in the past 6 months, September 2020

# Utilize chat groups to maximize purchases

Figure 12: Interaction with KOLs in the past 6 months, by purchase decision phases, September 2020

#### Target male consumers with paid content

Figure 13: Interaction with fashion KOLs in the past 6 months via paying for KOLs' content and purchased products on stores/channels KOLs recommended, by gender and age, September 2020

## KOLs receive the highest engagement from younger females

Figure 14: Interactions with fashion KOL in the past 6 months, commented, and liked, by gender and age, September 2020

#### Attractiveness for KOLs' chat groups

Figure 15: Interactions with fashion KOLs in the past six months via joining chat groups organized by KOLs on Weibo/WeChat/QQ, by personal income, September 2020

## **KOLs' Impact in Purchase Stages**

#### Fashion trends kev in 2020

Figure 16: Shopping stages affected by KOLs during purchase journey, September 2020

## Females want more purchase references

Figure 17: Interactive engagement with KOLs in the last 6 months, knowing about purchase channels, by gender and age, September 2020

# Young males rely on KOLs' content more

Figure 18: Interactive engagement with KOLs in the last 6 months, researching into a product, by gender and age, September 2020

Figure 19: Interactive engagement with KOLs in the last 6 months, when making a decision to purchase or not, by gender and age, September 2020

# Proving purchase experience for tier two consumers

Figure 20: Interactive engagement with KOLs in the last 6 months, knowing about purchase channels, by city tier, September 2020

# **Social Media Platform Used**

# Douyin tops KOL influencers

Figure 21: Platform of KOL engagement in the last six months, September 2020

# Competition in social commerce

Figure 22: Platform of KOL engagement in the last six months, live streaming commerce, by engagement, September 2020

# Different types of KOLs leverage different social media

Figure 23: Platform of KOL engagement in the last six months, by influencer type followed, September 2020

# Douyin drives the most revenue in paid content

Figure 24: Platform of KOL engagement in the last six months, by interactive engagement with fashion KOL, paid for KOLs' content, September 2020

# Weibo attracts younger consumers for its interactive communication

Figure 25: Platform of KOL engagement in the last six months, Weibo and WeChat public accounts, by consumer age, September 2020

# Gender preferences prevalent in types of content

Figure 26: Platform of KOL engagement in the last six months, by gender, September 2020

## **Product Purchased under KOL Influence**



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 | **EMAIL:** reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

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

#### Success in non-luxury purchases

Figure 27: Fashion products purchased with KOLs' influence, September 2020

#### Tier three cities consumers keen on luxury from influencers

Figure 28: Non-luxury and luxury handbags purchased with KOLs' influence, by city tier, September 2020

#### **Desired Content from Fashion KOLs**

#### Professionalism from fashion KOL desired

Figure 29: Desired content from KOLs, September 2020

#### Male consumers prefer more product comparisons

Figure 30: Desired content from KOLs, by gender and age, September 2020

#### Male fashion KOLs' lifestyles increasingly important

Figure 31: Desired content from KOLs, September 2020

## Fashion trends for men are highly important

Figure 32: Desired content from KOLs, September 2020

#### **Attitude towards Fashion Influencers**

## Increasingly stricter expectations towards fashion influencers

Figure 33: Attitude towards fashion influencers, September 2020

## Focus on tier two cities and 30-39s

Figure 34: Attitude towards fashion influencers – Changing preference towards a brand no matter which fashion KOL endorsed it, September 2020

# More close collaborations boost brand reputation

Figure 35: Attitude towards fashion influencers - Seeing fashion KOLs work more closely with brands, September 2020

Figure 36: Attitude towards fashion influencers – Seeing fashion KOLs work more closely with brands, September 2020

## Over promotion damages trust

Figure 37: Attitude towards fashion influencers – KOLs' credibility will be reduced by endorsing several brands of different images at the same time, September 2020

## Ensure branded content is palatable for post-80s

Figure 38: Attitude towards fashion influencers – Disagreement with changing preference towards a brand no matter which fashion KOL endorsed it, September 2020

## Challenge in building trust amongst tier three city consumers

Figure 39: Attitude towards fashion influencers - Agreement with KOLs recommend products just for money, September 2020

# **Appendix - Methodology and Abbreviations**

Methodology

Abbreviations

APAC +61 (0) 2 8284 8100 **EMAIL:** reports@mintel.com