

## Fashion Retailing - China - November 2019

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.



“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

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.”

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# Fashion Retailing - China - November 2019

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  
 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  
 Apparel outperforms

### Market Size and Forecast

**BUY THIS  
 REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Fashion Retailing - China - November 2019

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.

## 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

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

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Fashion Retailing - China - November 2019

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.

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

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

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Fashion Retailing - China - November 2019

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.

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

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

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Fashion Retailing - China - November 2019

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.

### 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

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

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)