

ATTITUDES TOWARDS FASHION – CHINA – 2024

Chinese consumers are becoming increasingly pragmatic and sophisticated in their fashion choices. No longer simply following trends, they are using fashion as a form of self-expression and shifting their focus from pleasing others to pleasing themselves.



Blair Zhang, Senior Analyst, China Insights



Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

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- What you need to know

The market

- Market factors
- Marketing activities
- New product trends

The consumer

- Sports and leisure are being incorporated into everyday life
 - Graph 1: outfit preferences in different scenarios, 2023
- Social media and online platforms boost consumer direction of fashion trends
 - Graph 2: sources of outfit inspiration, 2023
- People are most interested in trying urbancore and gorpcore, followed by workwear and New Chinese Style
 - Graph 3: interest in fashion styles, 2023
- Trousers are the most frequently purchased fashion product, while accessories have room for growth
 - Graph 4: fashion categories purchased, 2023
- eCommerce websites and their live streams are the most popular purchase channels for fashion products
 - Graph 5: purchase channels for fashion products, 2023
- Watchwords for clothing consumption in 2024: practicality and functionality
- Different fashion brands have their unique strengths
 - Graph 6: satisfaction with different types of fashion brands, 2023
- Fashion is about individuality and what suits each person
 - Graph 7: fashion attitudes, 2023

Issues and insights

What we think

THE MARKET

Market factors

- Clothes and jewellery consumption lead the post-pandemic recovery in China
 - Graph 8: total retail sales (hundred million RMB) and growth rate (%) of clothes, shoes, hats and textiles, 2013-23

Attitudes towards Fashion – China – 2024

- Consumer demand splits, unearthing new markets
- Policies encourage home-grown brands and promote sustainable practices
- Chinese consumers' fashion ideas are becoming more sophisticated and pragmatic
- The development of digital media and fashion news fuels industry growth
- Technological advancements drive innovation in the fashion industry

Marketing activities

- Outfits are the simplest mode of expression
 - Graph 9: mentions of fashion keywords 'dopamine (多巴胺)', 'Maillard (美拉德)' and 'New Chinese Style (新中式)' on Xiaohongshu, 2023-24
- Lifestyle is fashion
- 'Quality' will stay centre stage
 - Graph 10: discussion mentions of 'old money (老钱)' on Xiaohongshu, 2023-24
- Pleasing oneself remains the main motif in fashion consumption
- Marketing activities centred around women have not gone out of style
- The boutique buyer era may be here

New product trends

- New Chinese Style outfits will be the next big thing
- Functional outdoor products will remain popular
- Fashion consumption related to sports events will continue to set trends
- Continue to explore future trends in sustainable fashion
- Co-branding is still a potent method of reaching new audiences

THE CONSUMER

Outfit preferences for different occasions

- The boundary between sports and everyday clothing is blurring
 - Graph 11: outfit preferences in different scenarios, 2023
- Men are more likely than women to favour colourful clothes for sports
 - Graph 12: outfit preferences in different scenarios – fitness/outdoor, by gender, 2023
- Respondents in Tier 1 cities look to loosen up when partying/dating
 - Graph 13: outfit preferences in different scenarios – party/date, by city tier, 2023

Sources of outfit inspiration

- Fashion self-media bloggers are the most popular sources of outfit inspiration
 - Graph 14: sources of outfit inspiration, 2023
- Social media and online platforms boost consumer direction of fashion trends
 - Graph 15: sources of outfit inspiration – fashion self-media bloggers, by gender, 2023

Attitudes towards Fashion – China – 2024

- Respondents aged 25–29 love putting together fashionable fits
 - Graph 16: sources of outfit inspiration, by age, 2023

Interest in fashion styles

- People are most interested in trying urbancore and gorpcore, followed by workwear and New Chinese Style
 - Graph 17: interest in fashion styles, 2023
- Men prefer urbancore and gorpcore, while women favour workwear and new Chinese styles
 - Graph 18: interest in fashion styles, by gender, 2023
- Respondents of different ages prefer different styles
 - Graph 19: interest in fashion styles, by age, 2023

Fashion categories purchased

- Trousers have the highest purchase rate, followed by outerwear and suits
 - Graph 20: fashion categories purchased, 2023
- Consumers aged 25–29 are the most active shoppers in almost all categories, while those aged 50–59 buy the least
 - Graph 21: fashion categories purchased, by age, 2023
- Sports trousers are most popular in Tier 1 cities
 - Graph 22: fashion categories purchased – sports trousers, by city tier, 2023
- Accessories may have more room for growth
 - Graph 23: fashion categories purchased – accessories, by monthly personal income, 2023

Purchase channels for fashion products

- eCommerce websites and their live streams are the most popular purchase channels for fashion products
 - Graph 24: purchase channels for fashion products, 2023
- Different age groups prefer different channels
- Buyers of accessories prefer brands' official websites, fashion buyer platforms, outlets and duty-free shops
 - Graph 25: purchase channels for fashion products, by fashion categories purchased, 2023
- Advertising spread across ecommerce websites and their live streams, department stores/shopping malls and social media/short video platforms can reach 90% of respondents

Fashion consumption preferences

- Co-branding between high-end fashion brands and mass-market brands receives market validation
 - Graph 26: fashion consumption preferences – attitude towards co-branding between high-end brands and popular brands, by gender, age and monthly household income, 2023
- Most people are trading up incrementally
 - Graph 27: fashion consumption preferences – attitudes towards high-end product lines from ordinary brands, by gender, age and monthly household income, 2023
- Clothing brands need to provide versatile products
 - Graph 28: fashion consumption preferences – brand selection attitude, by gender and age, 2023
- Watchwords for clothing consumption in 2024: practicality and functionality

Attitudes towards Fashion – China – 2024

- Graph 29: clothing consumption preferences – attitudes towards product and brand, by age, 2023
- Graph 30: clothing consumption preferences – attitudes towards function and fashion, by age, 2023

Satisfaction with different types of fashion brands

- Different fashion brands have their unique strengths
 - Graph 31: satisfaction with different types of fashion brands, 2023
- Independent designer brands must retain their strengths in design and quality

Fashion attitudes and personas

- Self-expression lies at the heart of fashion
 - Graph 32: fashion attitudes, 2023
- Fashion is not the sole preserve of Tier 1 cities
 - Graph 33: fashion attitudes, by city tier, 2023
- Fashion insiders
- Lifestyle explorers
- Identity seekers
- Casual fashion followers
- Authority deniers

ISSUES AND INSIGHTS

Evolving fashion concepts: consumers increasingly seek practicality and self-indulgence

- Current fashion sentiment puts function first amid a shift towards pragmatic consumption
- Meet the post-pandemic need for healing with self-indulgent fashion
- Brand opportunity: increase engagement in fashion through practical outfits and low-cost interactions

Source of fashion inspiration: influence on fashion trends is diffused throughout the market

- Consumers have their own takes on fashion
- Trends are coming thicker and faster
- Challenges for brands: tap into shifts in mood and move from product marketing to culture marketing

Developing attitudes towards fashion: cultural confidence drives the popularity of New Chinese Style outfits

- The New Chinese Style clothes and accessories market is rapidly growing
- Celebrity ecommerce live streams are bringing New Chinese Style into the mainstream
- A challenges for brands: creating New Chinese Style fashion designs that are beautiful, practical and meaningful...
 - Graph 34: mentions of 'New Chinese Style outfits' (新中式穿搭) on social media*, 2023-2024
- ...and also blend modern aesthetics with traditional elements

APPENDIX – METHODOLOGY

- Methodology

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UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850