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CHINA'S FASHION SHAKE-UP

HOW INDEPENDENT CHINESE DESIGNERS ARE LAYING THE FOUNDATION OF "DESIGNED IN CHINA"

OCTOBER 2021

ABOUT THIS REPORT

One by one, consumers are taking note of China's fast-growing number of talented independent designers.

While they may be late to the global fashion race, these designers harbour a unique advantage: they represent, for the first time, the creativity and aspirations of Chinese generations with a global outlook.

Many of today's best-known fashion brands – from Chanel to Dior, Saint Laurent and Fendi – owe their original success to the creativity, personality and cultural relevance of their founding designers.

Today, these values remain just as relevant. Not only must brands create beautiful garments that capture and shape trends, they must also be relatable and reachable.

In China's highly developed e-commerce and social media environment, the most tuned-in, digital-savvy, independent Chinese designers are reshaping the aesthetic system of China's younger generations.

Though many are in their infancy, what they lack in size and retail revenue they make up for in their innovative approaches to value chains and offline retail models.

In short, they are 'China's Fashion Pioneers', heralds of a new age for the entire fashion industry.

To understand their growing role and what it means for the industry at large, éCLAIR Asia analysed defining characteristics of 58 of the most influential and visible independent labels founded by Chinese designers.

Data sources include direct in-depth interviews as well as publicly available information across leading social media and e-commerce platforms.

KEY FINDINGS

- While gender distribution is even among founding designers, only 17.3% design exclusively menswear. The majority design either exclusively womenswear (74.1%) or mixed (8.6%).

- Founding designers are increasingly younger. Those born in the 1970s had a median age of 34 at the time of founding, compared to 27 for those born in the 1980s and 23 for those born in the 1990s.

- The majority of Chinese independent designers have international education: 62.5% of those born in the 1980s studied abroad, rising to 100% of those born in the 1990s.

- Central Saint Martins and London School of Fashion in the United Kingdom are among the most popular institutions for Chinese designers: each have attracted 25% of designers analysed in this report.

- 93% of Chinese independent labels analysed in this report use Instagram as a marketing channel – equal to Weibo.

- On Weibo, some independent Chinese labels are outdoing global brands: 16 of the designer brands analysed have over 100,000 fans, and 5 have over 1 million fans.

- Buyer stores are the most common retail channel (87%) among designers in this report, with 24% using that channel exclusively. The next most commonly used retail channels are Tmall flagship stores (61%), owned offline boutiques (37%) and WeChat Stores (37%).

- Counterfeits are a challenge for independent labels too: in July 2021, 78% of transactions linked to the labels analysed were counterfeits, accounting for 56% of all branded sales value. On average, counterfeits were sold around 74% cheaper than real products.

FASHION PIONEERS

A study of 58 of the most influential and visible Chinese designer labels today

‘DESIGNED IN CHINA’

THE GROWTH OF CHINESE DESIGNER FASHION

Off to a slow start in the early 2000s, Chinese designer fashion only found its stride in the teens: 84% of the labels we analysed were created since 2010, with the median age standing at 7.5 years.

But growth of new labels has been explosive, with an average 30% year-on-year increase between 2011 and 2018.

Behind this growth is a combination of organic shifts such as maturing consumption behaviours and the growth of China's soft power, and infrastructural milestones including the emergence of Buyer Stores and the democratisation of fashion through social media.

2003 — **First Shanghai Fashion Week**
Only 6 brands participate

2008 — **Soft-power shift**
After the Olympics, efforts begin to turn "Made in China" into "Created in China"

2009 — **First Chinese Designer Buyer Store**
"Dongliang" is established.

2010

2011 — **Gift-giving reigned in**
China cracks down on luxury gift-giving; consumption for personal-use rises

2012 — **Social media take centre stage**
Weibo and WeChat give birth to social communities and early KOLs (influencers)

2013

2014

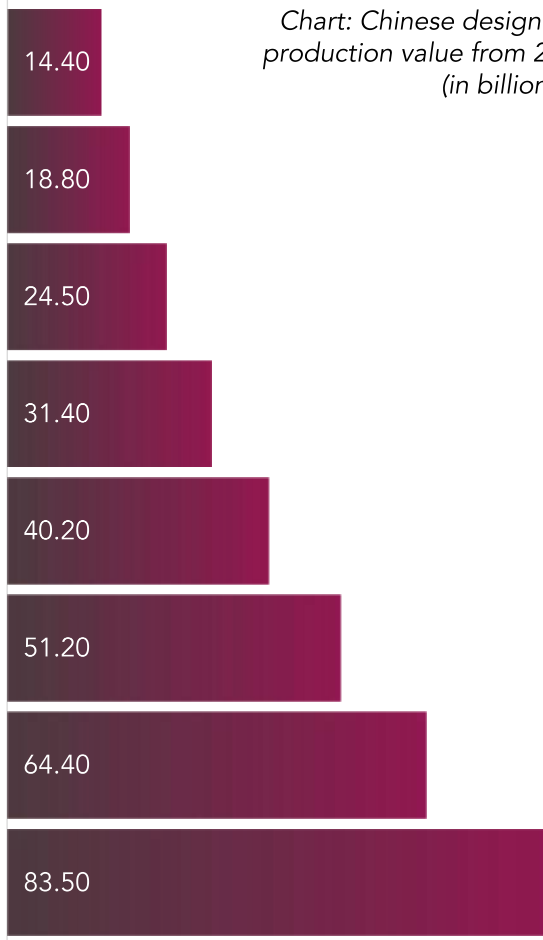
2015

2016

2017

2018 — **Tmall supports designners**
Tmall sponsors Chinese designers to participate in New York Fashion Week

Chart: Chinese designer label production value from 2011-18 (in billions RMB)



Source: 智研咨询整理

THE CHINESE FASHION PIPELINE

Over the past 20 years, the growth Chinese independent designers and their brands has been championed and enabled by the emergence of influential B2B\B2C platforms, namely Shanghai Fashion Week, Trade Fairs, and the Buyer Store model.

上海时装周
SHANGHAI FASHION WEEK

SHANGHAI FASHION WEEK

Shanghai Fashion Week shines the biggest spotlight on Chinese fashion designers, both at home and around the world.

From 6 brands in 2003, the bi-annual event has grown into an unmissable milestone in the fashion industry, attracting over 200 brands in 2020. Since its inception, the show has also been firmly axed on Chinese fashion; in 2021, over 50% of brands were from Shanghai; and nearly 20% referenced Chinese intangible cultural heritage.

TRADE FAIRS & SHOWROOMS

Held during Shanghai Fashion Week, a growing number of trade fairs are offering Chinese labels opportunities to engage multi-brand retailers and marketplaces.

The most prominent trade fairs include MODE - Shanghai Fashion Week's official trade fair, Ontimeshow, Showroom Shanghai, Tube Showroom, Alter Showroom, not Showroom, Dada Show, LAB Showroom, Nova X and HCH Showroom.

MODE

Ontimeshow
SHANGHAI

时堂 SHOWROOM SHANGHAI

BUYER STORES

棟梁 DESIGN FASHION ACCESSORIES

ooak

Featuring curated product selections from diverse brands based on their owners' preferences, buyer stores are the main offline sales channels for designer brands. The most famous stores today include Dongliang, Genshang, Autumn Sonata, OOAK, ALTER, and SHUASHAN.

First appearing in 1996 in Shanghai, the buyer store model only boomed from the 2010s. Between 2016 and 2019, the total number of buyer stores across China rose from 300 and 3,100, expanding beyond first-tier cities and into second and third-tier cities such as Shenyang, Changchun, Tianjin, Chengdu, etc.

After several iterations, Chinese Buyer's stores have evolved from simple stores to leisure spaces that integrate fashion, art, and coffee, cultivating niche consumer groups based on their fashion and lifestyle tastes.

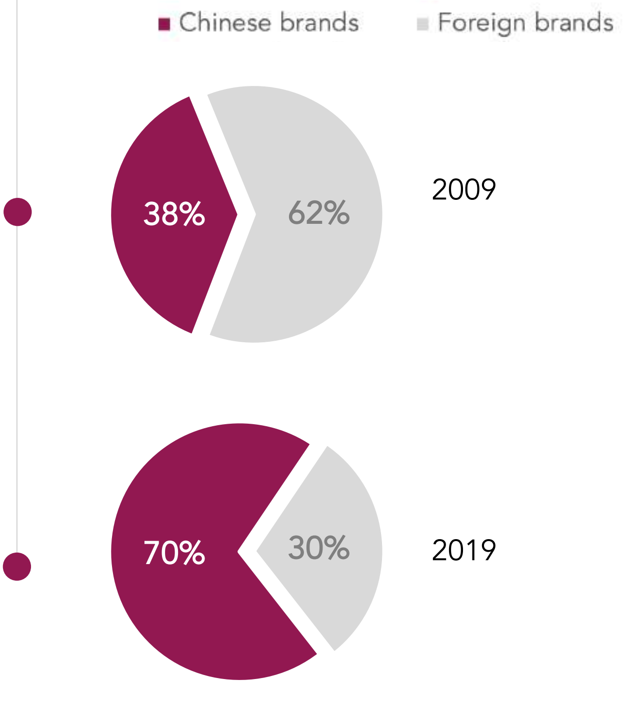
CHANGING HEARTS & MINDS

As a young generation native to the Internet, young Millennials and Gen Z rely heavily on social networks to access global fashion information, breaking through geographical constraints of the past.

In their eyes, fashion brands from Europe and the United States no longer have a halo, and the exclusive premiums that luxury brand logos carry is losing ground to newer, niche brands who offer new, more culturally anchored opportunities to reflect their personality through original designs.

> *"In recent years, I have definitely felt an improvement in the country's soft power. It's difficult to express in an outward way, but when we are more proud of China, what we design is different. Consumers also support us more."*
>
> \- *Zhi Chen*

Share of consumer following between Chinese and foreign brands in China, 2009 and 2019
(Source: 百度国潮骄傲大数据)



THE MODERN CHINESE DESIGNER

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WILD ABOUT WOMEN'S WEAR

When it comes to target customers, the 58 designer brands analysed highly favour women, with 74.1% (43 brands) offering only womenswear, followed by 17.3% (10 brands) offering only menswear, and 8.6% (5 brands) offering a mix of men's and womenswear.

This is interesting when we consider that genders are almost equally represented among the brands' 64 designers (6 brands are led by designer duos), with 47% men and 53% women.

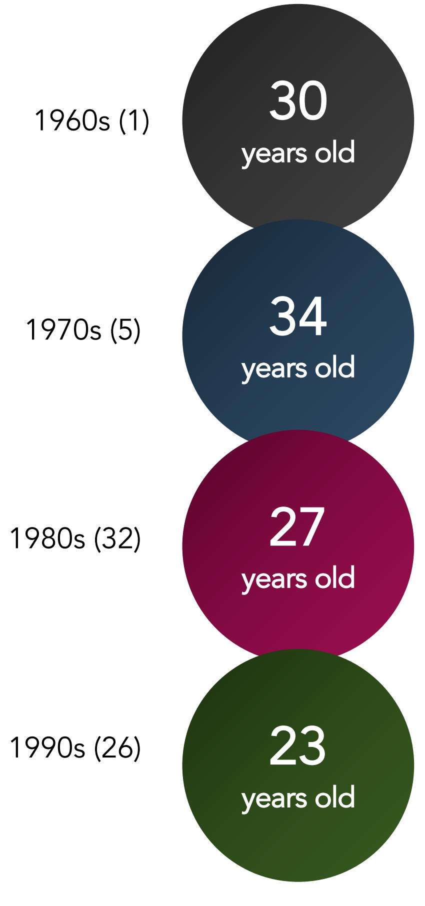
Female to male ratio among analysed designers
(sample: 64 individuals)

Womenswear to menswear ratio among analysed designer labels
(sample: 58 labels)

YOUNGER & BOLDER

Median designer age when founding their labels, by generation

(sample: 64 designers – figures in brackets indicate number of designers)



Steadily, the average age at which Chinese designers have launched their own labels has dropped with each generation.

Those born in the 1970s were on average 34 when they started their venture. Those born in the 1980s were 27 on average, and those born in the 1990s were 23 on average.

One reason behind this is a growth in young designers' confidence and desire to share their own aesthetic. And according to designer Ji Cheng, when it comes to fashion design, youth can be an advantage: "In this rapidly evolving age, young designers and their teams are often closer in age to their target consumers, allowing them to connect with them more naturally. This is far more important than experience."

Another factor is the absence of established Chinese brands that can take in young fashion talents. With few avenues to accumulate experience, starting a label offers the short-term value of self-learned experience, and the long-term dream of commercial success.

Womenswear label ZI II CI IEN is one such label, founded by Zhi Chen in 2017: "I found most domestic local brands do not pay enough attention to design, nor are they learning systematically. So instead of joining an existing brand, I decided to set up my own."

As Chinese independent designers mature and Chinese local commercial brands pay more attention to design, we are likely to see more and more cross-overs, while new star creative directors will strengthen China's voice and standing among global fashion consumers.

GLOBALLY-TRAINED

Since China's opening in the 1980s, the prospect of China's future global fashion brand has captured the imagination of millions of fashion lovers.

For aspiring designers, increase in global mobility has spurred interest in the world's top international fashion schools. Among the designers we analysed, 62.5% of those born in the 1980s studied abroad, compared to 100% of those born in the 1990s.

Overall, 73.4% of Chinese designers today (47 out of 64 analysed) have studied abroad – the majority in some of the most prestigious fashion schools.

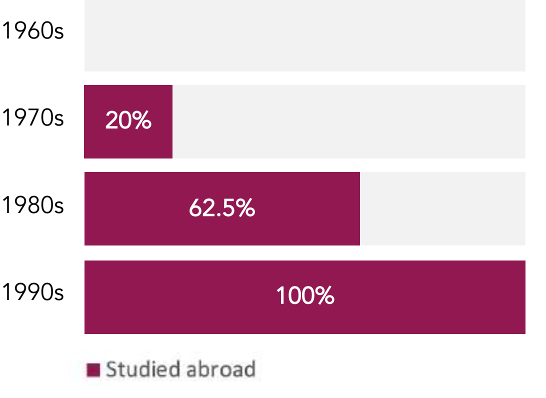
British schools carry the biggest cachet, with Central Saint Martins and London Fashion School each the alma maters of 16 designers (25% of our designers). 5 designers (8%) studied in Parsons School of Design in New York, and 20 (31%) studied at other foreign institutions.

Part of the appeal, it appears, is these institutions' track record in nurturing students' distinctive aesthetics to form some of the world's most renowned designers. "When I was studying abroad, I often focused on finding myself" says designer Bi Ran, founded of the label RANBI. "The professor would ask a lot of questions to help you define and find yourself. I think this is especially important for a designer."

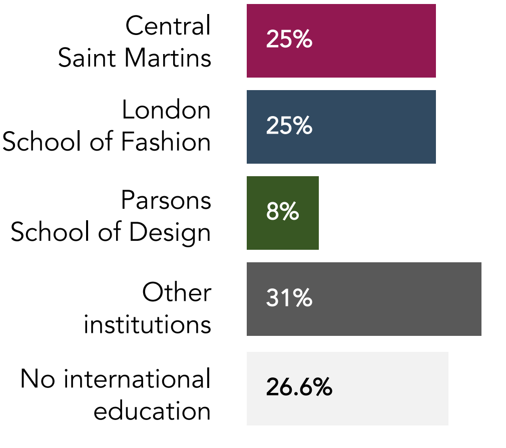
As Museum of Friendship Designer Wang Tianmo recalls, the school experience in only part of the value of studying abroad: "When I studied at Saint Martins in 2008, the Internet was not so developed, and going abroad was still a shock. As I would come home after lesson, I remember appreciating how many independent brand boutiques there were. That was a kind of subtle experience of fashion that influenced me outside of the classroom."

With the prestigious training – and networks – to compete with global brands, Chinese designers are closer than ever to creating tomorrow's global Chinese fashion brand, with a a distinctively modern Chinese aesthetic.

% of Chinese designers who studied abroad, by generation
(Sample: 64 designers)



% of Chinese designers attending International fashion institutions
(Sample: 64 designers – some designers have attended more than one institution)



SPOTLIGHT
UMA WANG

One of China's most internationally-recognised Chinese independent designers, UMA WANG's success is representative of a wider shift in Chinese design, from her aesthetic to her brand's integrity, visibility and commercial appeal.

After graduating from Shanghai Textile University (now Donghua University) in 1996, Uma, like most of her classmates, poured herself into Chinese local fashion brands. Over time, however, she found designs repetitive and lacking in creativity.

And though she had already been in the industry for eight years, rather than launch her own brand she decided to further her studies at Central Saint Martins in London in 2002. There, she learned how to harness and apply the creative inspiration from her own experiences, and decided to remain in the city to launch Uma Studio in 2005 (her agent had cautioned her that using the full Chinese name Uma Wang may affect sales).

Uma Wang's 2016 spring and summer series comes from a ballet film. The two opposites presented by the ballet actor's toes-tension and emotion moved her. She presented this theme in the form of clothing.

The studio mainly crafted knitwear, paving the way for her to establish her own distinctive style focusing on the manipulation of fabrics. In 2009, Uma Studio officially changed its name to Uma Wang, consolidated its commercial structure and expanded into Europe to conquer the international stage.

"(My team) helped me truly enter the European business ecosystem, as a Chinese designer brand" she told Numéro in 2019. "Many Chinese designers had already done international shows, but their business operations were still rooted in China, and they were not selling abroad. My approach was different. I entered the system and then landed commercially, so that I could have a firm ground to stand on."

Indeed, to succeed internationally, Chinese labels must go beyond securing international catwalks or media coverage. They must promote themselves systematically, secure international awards, and increase their distribution across multiple retail channels.

All these efforts start with the designer, but require the support of a professional team. Most importantly, they require a shift in mentality. "Many years ago, I was wondering why no [large] brand would do this [invite a local Chinese designer as a Creative Director]. Instead they would spend their money and energy on PR events. Why not use a beautiful aesthetic as an entry point [with consumers], and let a Chinese Designer lead the way? I think Chinese audiences would definitely feel happy and proud [of such a brand]."

For China's most established brands, this approach may become increasingly attractive.

BUILDING BRANDS

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WINNING WEIBO, EYEING INSTAGRAM

With lower retail footprints than large commercial brands, designers and their labels rely primarily on social media to reach consumers. There they can get consumer feedback, promote online and offline sales events, and turn consumers into customers.

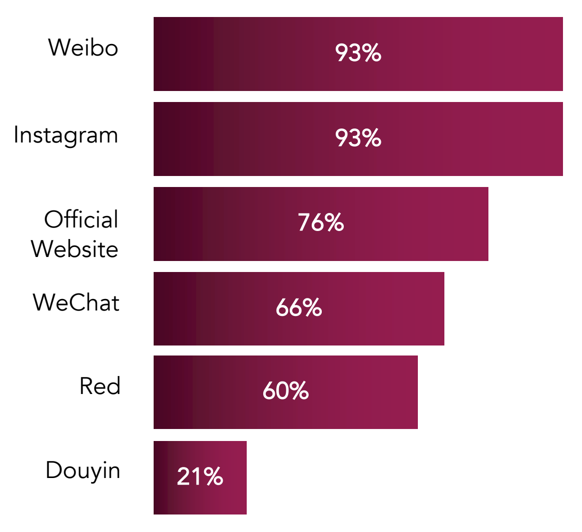
The two most popular promotion channels for designer labels are Weibo – with an average of 227,000 fans per label, a median of 36,200, and 8.46 million fans for the top five brands alone – and Instagram – with an average of 42,000 fans per label, a median of 14,500, and 1.24 million fans for the top five brands. Though it is officially banned in China, the use of Instagram may reflect both the designers' overseas experience and an effort to grow brand visibility globally.

On Weibo, top performers are outdoing global brands: 16 of the designer brands analysed have over 100,000 fans, and 5 have over 1 million fans. To put it into perspective, luxury brand Stella McCartney has 83,000, while fashion label Michael Kors has 670,000.

But there is another side to the social media equation.

Xiaohongshu and Douyin, while popular with Gen Z, are less utilised by new designer brands. This is likely due to the fact they require heavy investment in the creation of rich content. In designer Ji Cheng's experience: "Video content is becoming increasingly favoured on social media, and brands are under pressure to increase the rate and quality of production. But the marketing budgets of independent designer brands are usually restricted, so brands can end up spreading themselves thin, with low visibility and return on investment."

Top marketing channels used by Chinese designers
(Sample: 58 labels)



Chinese Designers' Median fanbases across Weibo, Instagram and Red
(Sample: 58 labels)

36,200

14,500

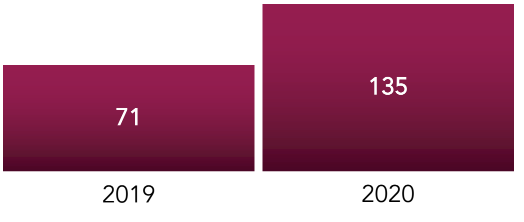
小红书 820

SHARING THEIR CULTURAL EDGE

One of the most effective ways for designer labels to break out is through brand collaborations.

In fact, 70% (41 out of 58) of designer labels have rolled out collaborations , and many of them are doing so repeatedly. And this number is growing. According to Luxe.Co's Chinese Designer Report, the total number of brand collaborations featuring an independent Chinese designer rose from 71 from 2019 to 135 in 2020.

Brand collaborations featuring independent Chinese designers, 2019 vs 2020
(source: Luxe.Co Designer Report)



Interestingly, we have also been witnessing a shift in the type of brand collaborations.

From 2017-2018, most designer collaborations were rolled out with non-fashion brands, mainly in FMCG such as Vitasoy and Chacha, or household appliances such as Red Star Macalline, Casarte, Oppo and Huawei. In 2018, six major Chinese brands including Laoganma, Yunnan Baiyao, Master Kong, and Tsingtao Brewery, attended New York Fashion Week in collaboration with Chinese designers – contributing to the emergence of the Chinese national wave (Guochao) in fashion.

For these brands, independent designers represent creative marketing partners that can help them engage younger or niche consumer groups through design and craftsmanship.

For designers, the brands can provide national or international visibility and awareness – though the designers almost invariably take a secondary, "guest" role.

From 2019, independent Chinese fashion grew in visibility, and designers continued to grow more distinctive design languages. And as they win-over more and more consumers with their creative talent, doors are opening for more fashion-focused and international collaborations such as the capsule collections of Angel Chen x Canada Goose, Wang Fengchen x UGC, Ximon lee x Reebook and RANBI x Adidas.

In these collaborations, the relationships is more balanced: large, international fashion brands can broaden their product range through the work of emerging designers, explore Chinese culture and aesthetics with minimal risk, and increase their appeal – and sales – among Chinese consumers.

Young Chinese designers, on the other hand, can learn more about large brands' design processes, mobilise resources beyond their typical scope, and gain business experience that may help them grow their labels into global brands.

"My collaboration with Adidas was my first foray into shoes" says independent designer Bi Ran. "I learned about shoes' various sections, pieces and production process. For me, working with many brands is a way to broaden my design methods and continuously improve my own process."

From guest roles with non-fashion brands to capsule collections with international fashion brands, independent Chinese designers are gradually mastering the art of collaboration to increase their standing on the global fashion stage.

LIPTON
2016
Peach and mango
ceramic pins

MERCEDES
2017
Car stickers and
inspired by the
grasslands of Africa

AIRBNB
2018
Los Angeles
BNB design

VIVO
2018
Mistress Qing-
inspired accessory
designs

TSINGTAO
2019
Can design inspired
by retro Chinese
posters

H&M
2020
Joint capsule
inspired by iconic
Chinese movies

MAC
2020
Artistic make-up
concept inspired by
'Mulan Poetry

LOUISAVIAROMA
2020
Limited edition jacket
inspired by
"fight club"

ADIDAS
2020
80s and 90s'
inspired sports
collections

CANADA GOOSE
2020
Capsule collection
reinterpreting
Snow Mantra

ADIDAS
2020
Capsule collection
with traditional
Chinese aesthetic

SPOTLIGHT
ANGEL CHEN

Hailing from Shenzhen, Angel Chen is one of China's most visible independent Chinese designers today.

A graduate from Central Saint Martins School of Design, Angel interned shortly with renowned brands including Vera Wang and Alexander Wang during her studies, before launching her eponymous label in Shanghai in 2014.

From early on, Angel seized commercialisation opportunities one after the other, securing strong brand recognition within just a few years. Consumers have come to recognize her design style as bold, sexy and full of tension, with an emphasis on rich colours and unexpected details.

Originally working with non-fashion brands, in recent years the label has increasingly rolled-out capsule collections with major international brands including H&M, Adidas and Canada Goose.

Alongside these collaborations, have also come many accolades: her talent was soon recognised globally: in 2016, she was listed on the Forbes "30 Under 30" Young Talents list, and appeared on the Business of Fashion 500 list the following year. In 2018, her label won the International Woolmark 2018/19 Asian Division Award, and in 2020, she participated in the Netflix fashion competition show "Next in Fashion".

BETTING ON PHYSICAL RETAIL

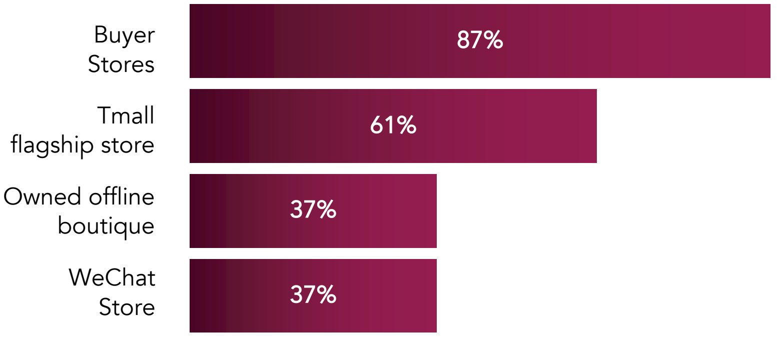
Among 54 labels analysed, **buyer stores** were the most common retail channel (87% or 47 labels), with 24% (13 labels) using that channel exclusively.

The next most commonly used retail channels are Tmall flagship stores (61%), and owned offline boutiques (37%) and WeChat Stores (37%).

While WeChat garners a wide audience as a social media platform, its relatively closed environment makes it challenging for designer brands to build a large user base and drive sales at an early stage. Three of the labels analysed in this report have closed their WeChat Stores in the past few years.

Adoption of individual sales channels among Chinese designer labels

(sample: 54 labels)

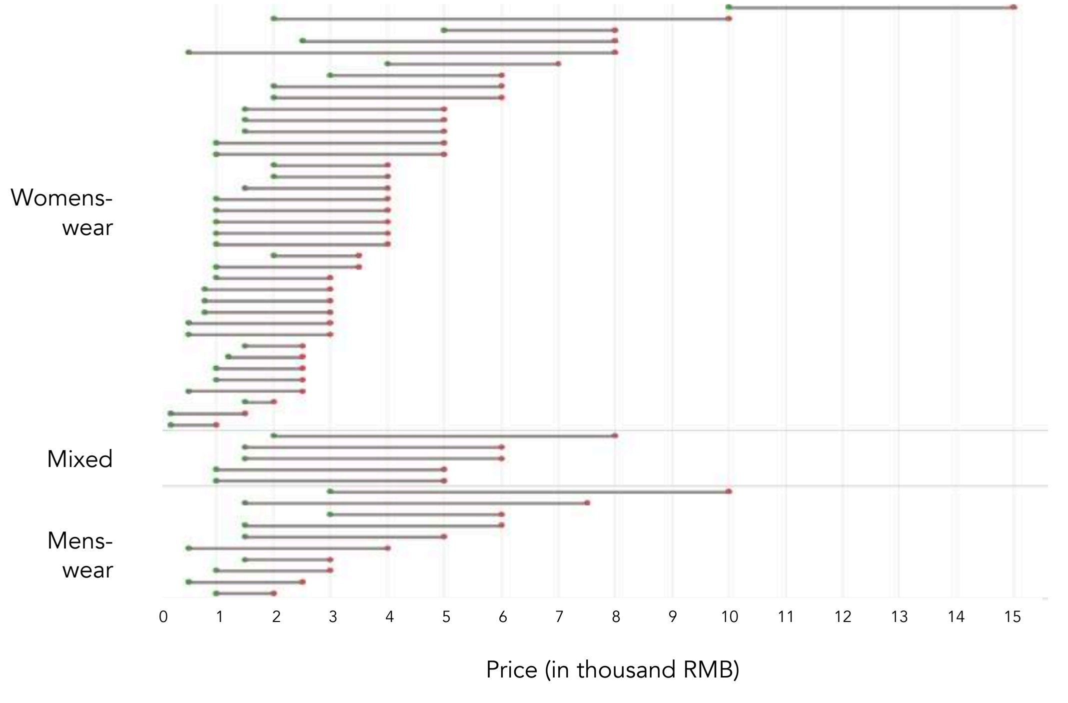


Top 5 most common sales channel mix among Chinese designer labels

(sample: 54 labels)

BATTLING WITH PRICING

Snapshot of price ranges across Chinese designer labels
(sample: 54 labels)



When it comes to pricing, independent designer labels must often operate within different parameters than larger commercial brands.

With smaller output volumes than established fashion brands, designer labels must pay higher unit production prices.

Combining production costs with margins added by Buyer Stores where most sales take place, final retail prices can often end up beyond a designer's control. This represents an important challenge for labels: how to manage a pricing strategy that is not in line with the designers' target demographic?

Most designers' price-ranges for single products start around RMB 1,000, while Autumn and Winter collections tend to start between RMB 2,000. Individual coats often exceed RMB 10,000.

In many cases, price points are comparable to those of luxury brands.

But while consumers may be willing to pay a premium for brands that have built their brand reputation over decades, through day-to-day marketing and PR, iconic designs and product portfolios, in the case of designer brands they may be less forgiving of the production dynamics behind high prices.

Many Chinese designers have realised this and are circumventing this obstacle by launching lower-priced "secondary labels". Naturally this gives rise to a new challenge: how to operate two price-ranges at the same time and ensure the desired brand positioning will come on top in the long term? For now, it is still too early to tell.

TACKLING COUNTERFEITS

Counterfeits remain a challenge impacting the whole of China's fashion industry – and independent Chinese designers are not spared.

In July 2021 alone, we found that a staggering **78%** of transactions linked to our 58 labels were counterfeits, accounting for **56%** of all branded sales value. On average, counterfeits were sold around **74%** cheaper (RMB 500) than real products (RMB 1,379).

To understand this dynamic better, we combed through 1,300 comments on Weibo, Douban and WeChat featuring the keywords "fake" or "counterfeit" alongside our monitored labels, and found two main stated drivers behind the purchase of counterfeits:

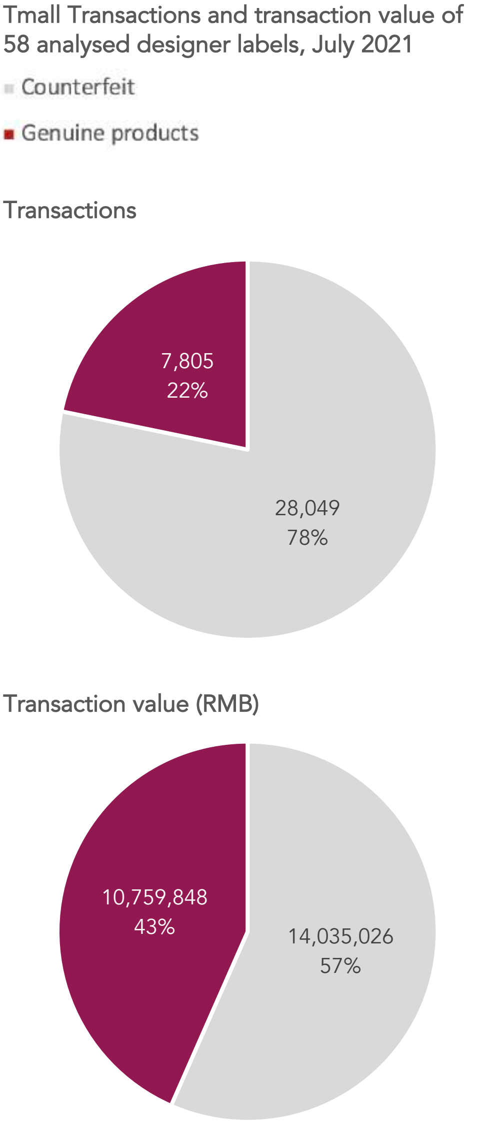
Pricing, as expected, is the leading factor representing **69**% of comments. This makes sense considering designer brands often target younger demographics who are keen to try new products frequently, but lack purchasing power.

Low brand awareness is the second key factor, representing **31**% of comments. With algorithms set to place best-selling products higher up search results, consumers may struggle to realise they are not in fact buying original products.

"Counterfeit products have always existed, and we have tried to fight them, but the cost of defending our copyright is too high, whether it is in money or energy" says designer Zhi Chen. "I think this problem can only be truly overcome when creatives can generate value for the industry and the country through large enough to drown piracy."

Indeed, fashion garments often represent years of training as well as an individual creative language honed from personal interpretations of art, life, and nature. Fashion design is a lengthy process that involves many drafts, fabric selection, pattern making and modification, and a certain dedication to creativity and craft.

Ad designer Wang Tianmo shares : "Some of my customers will buy a genuine garment and its counterfeit version at the same time, compare them, and keep the one that is most value for money. When consumers choose to buy imitations, they are actually choosing a way of life, a way of pursuing quantity and novelty, while shunning sustainability. This is a loss for China."



Copycat manufacturers have established a complete industrial chain, going after the most popular designer labels on Tmall, social media and among celebrities, and using the algorithms of sales platforms to maximise reach.

Comparing the top 5 selling genuine VS counterfeit products among our 58 analysed designers on Taobao & Tmall in one month, some independent labels clearly have steeper "competition" from counterfeits than others.

Designer brand Immi, for instance, saw 3 counterfeit products sold for every genuine product in July 2021. On the other hand, labels Comme Moi and Superr who sold the most genuine products in the same month, do not appear in the top five of counterfeited brands on Taobao & Tmall.

Top 5 ranking designer label Taobao & Tmall sales in July 2021

(**Sample:** 58 labels)

Genuine products

Labels	Sales Transactions	Sales Value (RMB)
COMME MOI	1,178	2,130,000
SUPERR	1,009	145,000
IMMI	813	1,570,000
TU YUE	791	830,000
DEEPMOSS	665	1,270,000

Counterfeit products

Labels	Sales Transactions	Sales Value (RMB)
SMFK	10,613	3,790,000
IMMI	3,247	1,795,000
SANKUANZ	2,546	1,610,000
MARCHEN	823	500,000
DEEPMOSS	692	905,000

SPOTLIGHT: MARCHEN

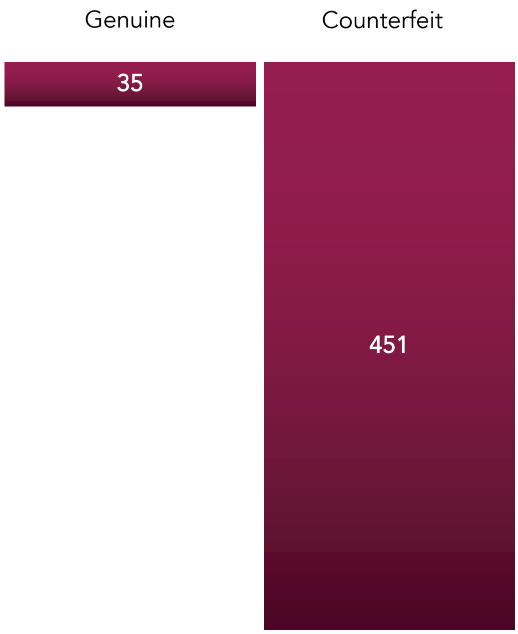
MARCHEN (meaning fairy tale in German) was launched by designer Chen Mei in 2015 one year after her graduation from Central Saint Martins.

Marchen's designs focus on the materialisation of romance and gentleness through refined textures and intricate craftsmanship.

In 2019, the brand’s bow dress (from its Spring/Summer collection) became an instant hit for original design, and was soon worn by stars including Cici Xiang Yanjing, Liu Wen, Zhao Jiali. Retailing at RMB 4,980, it is now available in dozens of online and offline buyer stores.

Unfortunately for the brand, success is synonymous with counterfeits, and imitations are rampant on Taobao and Tmall.

Sales of Marchen’s Bow dress on Taobao and Tmall in July 2021



WHAT'S NEXT?

With second and third-tier cities joining the international networks of top luxury brands, access to fashion has never been greater – and consumers have never been more discerning when it comes to creativity. Styles are diversifying, and consumers are becoming bolder in sharing their distinct aesthetics.

Since 2020, the world has also grappled with disrupted supply chains and consumption patterns, including travel retail which represented roughly a third of China's global luxury fashion consumption in 2019. With international movement and consumption restricted, the importance of digital in the Chinese consumer journey has only grown faster.

It is among this series of large and small changes that we have witnessed the rise of Chinese designer brands. Already there are some break-out stars participating on the global stage, inspiring a young Chinese generation eager to proudly own and share a vision of Chinese modernity.

While still small in comparison to international fashion brands, these young Chinese independent designers are fast building a new image of Chinese fashion both at home and abroad. That image is one of professionalism, creativity, boldness – all attributes at the foundation of the most successful fashion houses. But more than international brands, these designers enjoy the distinct advantage of being culturally closer to the world's biggest fashion consumer market.

ACKNOWLEDGEMENTS

We would like to thank the following people for their valuable time and contributions to the making of this report:

Author: Chen Liang
Researcher: Wang Zhining
Editor: Gregory Cole
Data Analysts: Han Hao, Chen Jing
Designer Interviewees: Bi Ran (RANBI), Ji Cheng Wang Tianmo, Zhi Chen (ZI II CI IEN)

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