Rise of Chinese streetwear

A Comprehensive Interpretation of Chinese Streetwear Market

Research Report
500684277 Xinhong Zhang
International Fashion and Management

Coaches: Sander Schellens and Jorrit Lang

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Date : 08/06/16
Place : AMFI, Amsterdam.
Name : Xinhong Zhang

Signature
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My graduation project is focusing on marketing and branding area that follows my specialization and minor in AMFI. Since I worked in menswear department during my internship and personally I am very interested in this field, I would like to continue my research in menswear section for my research report. Besides, my original motivation throughout the whole flexible program is to apply what I have learned from AMFI to Chinese market. Therefore during my graduation project I will continue trying to implement it in the final product.

I would like to thank my mentor and coach Sander Schellens for his expert advice and encouragement throughout this graduation thesis. I would also like to thank Yikang Wang who gives me a lot of English writing suggestions.

Finally, I must express my very profound gratitude to my parents in China for providing me with unfailing support, continuous encouragement through my years of study and through the process of researching and writing this thesis. This accomplishment would not have been possible without them.
ABSTRACT

This research report gives a thorough insight into both the Western and the Chinese streetwear market. Through different research methodologies, such as secondary research, netnographic research, and interview analysis, the main research question “What are the differences between Western and Chinese streetwear brands?” will be carried out. After the in-depth comparison analysis, the differences will be given from three major aspects as discussed throughout the report: culture & symbolic brand values, Chinese streetwear market and Chinese millennials’ perspective.

Streetwear is a distinctive fashion style rooted in the 80s in California and drew influence from the surf, skate and hip hop scene. Its core values then, were about rebelliousness, self-expression, and breaking established rules. As its popularity propelled towards mainstream due to the rise of Internet in the late 90s, streetwear became less about anti-establishment, and more about fashion styles and trends. Contemporary streetwear brands capitalized on their success and differentiated themselves from mainstream again by encompassing an element of luxury fashion and reintroduced the original culture.

About 20 years ago, the street culture and streetwear style spread from Western countries to Asia. Alongside the popularization of social media among China’s millennials, the Chinese streetwear market starts to show a great demand for streetwear brands at the moment. It also provides many potential opportunities for Chinese local streetwear brands to take advantage of, such as the growing purchasing power of the new generation, flourishing e-commerce industry and mobile payment system.

Valuable references and data for the local Chinese streetwear market will be provided by also revealing some of the shortcomings of Chinese streetwear brands, such as the lack of culture values, brand identity, and weak brand awareness. Chinese millennials, as the primary target group of Chinese streetwear, will also be researched, based on their characteristics. This generation is incredibly individualistic and pursues self-expression that precisely represents the spirit of streetwear style.

The research report strived to find out the success secret of Western streetwear brands, which is a positive brand identity and unique culture values. Meanwhile, it also located the inadequacies of current Chinese streetwear brands concerning the lack of brand equity. Above findings will allow Chinese streetwear industry to make constructive improvements in the contemporary market.
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CHAPTER 1
INTRODUCTION

Rationale and aim

Streetwear style is beloved in the fashion industry nowadays. The boundaries between high fashion and streetwear are more blurred than ever (Eror, 2016). For instance, one of the biggest headlines is the collaboration between Supreme and Louis Vuitton, which surprised everyone last month in FW2017 Menswear at Paris fashion week. It is called one of the most important pairings in fashion history in the last decades (Amarca, 2017). In fact, plenty of high-end designer labels are following streetwear designers’ fashion vision, such as Gucci under Alessandro Michele, Riccardo Tisci’s version of Givenchy and the sneakers Karl Lagerfeld designed for Chanel (Dool, 2017). Originally, streetwear is rooted in the city Los Angeles, Californian and influenced by youth culture. It has grown to involve elements of skateboarding, hip-hop, and surfing. Traditional streetwear clothing refers to sportswear brands such as Adidas that attached to early emerging hip hop subculture in the 80s (Hundreds, 2011). Streetwear is the relatively affordable provenance of sneakers, hoodies, and caps (Dool, 2017). “I’ve always associated the term with brands that mainly do T-shirts and sweatshirts,” (Mazhar, 2016).

Since 2000 in China, because of the globalization, rising income, and popularization of the Internet, foreign ideas and cultures began to have an impact on the young generation who were willing to accept new things. China’s millennials are increasingly expressing their individuality (Russel, 2016). Since Streetwear is as much a distinct fashion movement as it is a lifestyle, a culture promoting a sense of individuality, freedom of expression, and an anti-authority outlook (Zhao, 2014), which exactly fits the concept Chinese millennials are focusing on. The number of Chinese millennials who are influenced by streetwear style and youth culture continue to expand.

Meanwhile, with the rapid social development, there are many opportunities in the Chinese streetwear market. The booming e-commerce industry and emerging Chinese young fashion designers embody broad development prospects. Since streetwear is crossing boundaries moving into different areas of the fashion world, the line between high fashion and streetwear style is more blurred than ever (Eror, 2016). China could be building its own streetwear fashion kingdom for Chinese millennials consumers.

However, due to the traditional society, based on the homogeneous population, rich history and cultural civilization in China, new things are not easily accepted. Subcultures are less popular and developed in China than in the US and Europe. Streetwear style is defined as a completely foreign culture in the Chinese social context. It only has been in China for a decade (read01, 2016). Therefore there is not that much literature and research in China concerning this field. The lack of information, opinion leaders, and dissemination channels could hinder the development of the Chinese streetwear industry.
The aim of this research paper is thus to provide some valuable references and data for the Chinese streetwear industry so that it can make a constructive improvement for existing Chinese streetwear brands. This leads to the question, “**What are the main differences between Chinese and Western streetwear brands in China?**” In order to answer the main research question, a couple of sub-questions need to be answered. These questions are as followed:

1. **What is Western streetwear style?**
2. **What is the size of current Chinese streetwear market?**
3. **Who are the Chinese millennials?**

The outcome of the research report will help gain new insight into the Chinese streetwear market and its differences compared to Western leading streetwear brands, which will lead to come up with a possible marketing approach and a branding goal for a chosen Chinese streetwear brand. Keeping this in mind, both Western pioneer streetwear brands and Chinese streetwear brands will be researched based on a method of comparative study to explore the differences in the development process, socio-culture, and brand values. After that, the research will go further in depth by investigating Chinese millennials since they are the main purchasing force in Chinese streetwear market.

**Methodology and structure**

To make it clear which market is researched, this report starts with introducing the Western streetwear context. Then the Chinese streetwear market will be investigated. The first two chapters will be based on secondary research, which is mainly done through netnographic research. This includes literature review, visual analysis, interview analysis that will support the arguments. Following the theoretical framework, D.E.S.T.E.P. model will be applied to looking at the external Chinese streetwear market. Besides that, an in-depth exploration of Chinese streetwear market will be done by research in Chinese literature. Furthermore, besides netnographic research, ethnographic research will also be conducted to collect primary data. This includes interviews with streetwear experts and Chinese millennials in China. Through quantitative and qualitative research, this report strives to give a conclusive insight into the main differences between Chinese streetwear brands and Western streetwear brands.

This report will be divided into five chapters; the introduction followed by three chapters that answer the sub-questions, respectively: What is Western streetwear style? What is the size of current Chinese streetwear market? Who are the Chinese millennials? Finishing with a conclusion.
CHAPTER 2
WHAT IS WESTERN STREETWEAR STYLE?

In order to give a clear overview and introduce the angle chosen to research streetwear, this chapter starts with describing the history of streetwear from three perspectives—demographic, brands, and culture values, respectively. Then the contemporary streetwear and how it becomes mainstream will be discussed. Next, the post-streetwear will be put forward as a result of the mainstream to discuss. Through a storytelling tone of voice, the first sub-question will be answered.

History

"Streetwear is about culture. It is not about clothing." Bobby Hundreds (2017)

As explained in the previous chapter, the term streetwear is one of the most common categories in today’s fashion world. According to Diamond Supply CO-founder Nick Tershay (2017), “Streetwear to me is young T-shirt brands.” Design-wise, it is always associated with T-shirts, hoodies, sweaters, sneakers and cap, which is something any fashion brands can identify with. Thus it is very difficult to define it. In his branding lecture Mossinkoff said that it is hard to tell who you are and what you like, but it is clear what you don’t like and who you are not. Brands serve differentiation rather than identification (Mossinkoff, 2016). Let’s start with what streetwear is not. Taking one fashion brand that we are all familiar with, Zara, which cannot be defined as streetwear brand even though it produces T-shirt and hoodies. One of the biggest reasons Zara cannot be defined as a streetwear brand is that they target the mainstream market. It aims to design clothing that everyone would accept. However streetwear, from its beginning, only exists among minorities who belong to subcultures communities with similar passion.

Demographically, streetwear style came from the Californian surf and skate scene at the end of the 70s and the early 80s (Hundreds, 2011). The countercultures of the ’70s and 80s’ were some of the most visually self-expressive movements (Marshall, 2015), especially with groups like skaters, surfers, and hip hop rappers. “I was skateboarding in the Nineties, listening to hip-hop and buying $30 Vision Street Wear tees. That’s where I started. The raw essence of it was Dogtown and Z-Boys, skate culture, print your own T-shirt with your crew name on it and wear it like a badge kind of thing,” (Abloh, 2016). They were also very interactive during that time to express individuality through producing creative work, in which some related political and social issues such as police brutality, race relations, economic impoverishment, violence, and even spirituality. They started to launch their own fashion labels since there were not many brands that aligned with their rebellious and unique style. Many began as T-shirt brands that were cheap and customizable. Concept wise, it draws inspiration from graffiti and hip hop music into bold logos and artistic graphics (Birch, 2008). The first one of those to make an impact on the scene was Los Angeles surfboard designer Shawn Stüssy who started to print his own version of Chanel’s linked logo on bucket hats, baseball caps and varsity jackets along-side surfboards. By 1990, the business had
generated $17 million in annual turnover (Deleon, 2015). With the success of Stüssy, others soon began to follow him and then the streetwear started to spread across the USA.

Above all, the streetwear style is derived from the lifestyles of young generations. These people, who wanted to differentiate themselves from anything considered mainstream gathered because of common passion and attitude in life, and gradually formed a unique style (the anti-authority look) and culture. And it is the culture that created the streetwear clothing and that later developed into commercial brands. However, in fact, it is never supposed to become commercial. As the designer of Fear of God, Jerry Lorenzo, said that “anything would be considered street that comes outside of the traditional fashion system... and I still don’t really know what exactly ‘that system’ is.” (2017) He described his work “It’s street in the sense that I’m self-taught. And, in the sense we don’t belong to a fashion house or have access to any resources outside of our own. No investors, no partners, etc. The product is pure as we’re not on the fashion calendar and our product is 100% a reflection of our perspective and capabilities.” (2017) Thus, from a brand perspective, original streetwear brands targeted a niche market. They differentiated themselves by operating against the traditional fashion system rules. Instead of focusing on producing garments, they were creating a lifestyle and culture. The symbolic value behind the product is what they stand for.

There are more quotes that support this agreement:

“There’s brands out there that are obviously maybe more fashion brands that are calling themselves streetwear,” he adds. “They ain’t streetwear. My definition of streetwear is that what we learned, we learned on the street. We learned how to iron our clothes by being on the street. We learned how to cuff our pants. We learned how to dress based on our experience on the street, you know what I mean? It wasn’t social media, man.” (Ruiz, 2017)

Kyle Ng of Brain Dead also underscores culture in defining streetwear. “I look at it like a band, right,” he says. “Like, when I buy band T-shirts or when I was a kid buying skateboarding clothes, it wasn’t really about clothes. I wasn’t really interested in clothes. I was interested in representing a story or a narrative or a lifestyle.” (Hundreds, 2017)

Contemporary

Hit the mainstream
As a result of deep secondary research into contemporary Western streetwear, the conclusion can be drawn that streetwear has become enormously mainstream in the current fashion world. Though many factors have contributed to the growth in popularity of streetwear, this paper shows a specific interest to the fact that the Internet, and hip hop celebrities are two reasons considered why streetwear has lost its exclusivity and has become mainstream.
Internet
With the extreme digital platform development over past decade and the enormous increase use of social media, the streetwear culture quickly spread from niche interests to international phenomena. “I think it finally became a terminology in 2002 or something like that”, says Jeff Staple, the founder and creative director of Staple Design (2017). What the Internet has taken away the exclusivity, it gives back in the hype. According to WeConnectFashion (2015), in 2011, the streetwear market was estimated by Reuters to have a value of $60 billion USD, over $70 billion USD for 2012 and $75 billion for 2014. Without the Internet, in order to get the limited edition, fans really need to do research and track it via print publications, then physically hustled to the right places at the right time (Elsayed, 2016). But today, the rise of digital platforms, e-commerce, and social media change all that. Many niche media entities like Hypebeast and Complex have now gone bigger and public, seeing articles about Supreme is as common on GQ as it is on Highsnobiety (Deleon, 2016). Yeezy’s kicks are available with online retailers at the same time as its latest drop. Many Instagram accounts are the spoilers that feature tons of underground information about forthcoming launch. If a certain brand has a limited release in Tokyo, someone in America will be able to know about it and try to get it (Pathak, 2016).

Hip hop celebrity
Originated from the South Bronx, Hip hop now has become the most common music genre around the world. With hip hop having such a direct link to streetwear, its powerful influence has permeated throughout the fashion world since the 2000s (J. Flores, 2012). Addition to the Internet, hip hop celebrities play an important role that helped streetwear style to step in the spotlight of media. Rappers are not only simply seen as music artists, but also emerged as tastemakers, influencers and successful businessman in mainstream cultural consciousness over the last decade. It already started in the 80s, the prevalence of b-boy culture (one of the four original elements of hip hop) boosted the popularity of sportswear brands (Smith-Strickland, 2016). For instance, the early hip hop group Run-D.M.C appeared everywhere including performances with the Adidas Superstars sneakers and three-striped tracksuit, which popularized Hip Hop fashion and streetwear style that still remain powerful today (Mallery-Pratt, 2014). See figure 2 below.

Since then, the relationship between Hip Hop and fashion continually grew closely connected. It even becomes a valuable marketing tool. Pharrell Williams introduced BAPE (A Bathing Ape) to the World at the 2006 MTV Video Music Awards. Jay Z and Kanye West brought Street Goth and Givenchy on stage during the Watch the Throne Tour (Leach, 2015). Hip hop stars constantly wear streetwear brands in public or put brand names in their music, such as rap lyrics, have a strong impact on the hip hop community and people (also known as the ‘hip hop consumer’) who want to dress like their favorite rappers.
“Post-streetwear”

Since streetwear encompasses such a global influence, the fact that Stüssy can now be found at Urban Outfitters shows how mainstream the once-underground movement has become. The streetwear culture has changed over time. As the results of mainstream, it is hard to differentiate streetwear brands from each other, which is contrary to original streetwear culture. For instance, from a brand perspective, back in the day a great number of streetwear brands incorporated political and social issue into designs that generate more a meaningful message to consumers, while nowadays brands without any identities and values by just producing oversized hoodies call themselves ‘streetwear’. (Harris, 2014)

The blind consumption is another factor that affects the brand differentiations. Many consumers are driven only by the hype without having knowledge about the product itself. As Noah said “[someone] who has a fulfilling life outside of buying new clothes... society is swinging to a place where looking ‘alternative’ and ‘unique’ is more and more acceptable. But you look at people dressed like the icons of punk rock and their actions don’t reflect that ideology. So how that person looks is kind of... bullshit......(he is anti) frenetic consumer behavior and the idea that you need to own so much stuff. But it’s not just Supreme—it’s society in general. It’s the lines outside the Apple Store, the lines outside of restaurants. It’s consumption being out of control.” (2015)

However, there is a new guard of designers emerging who are reacting to the mainstream and signify the dawn of a new era in streetwear world. In this moment of the following most representative brands and designers, we are living in a time where the evolution begins:

<table>
<thead>
<tr>
<th>Designer</th>
<th>Awards</th>
<th>Price</th>
<th>Company performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offwhite</td>
<td>Virgil Abloh, finalist for 2015 LVMH prize</td>
<td>Bomber jacket $1,150</td>
<td>According to Myhr, Selfridges has seen sales surge by 100 percent between 2015 and 2016 (Morency, 2016)</td>
</tr>
<tr>
<td>Vetements</td>
<td>Demna Gvasalia, 2015 LVMH prize finalist</td>
<td>Reconstructed Levi’s jeans range from $1,040 to $1,500</td>
<td>Luxury vendors who stock the collection — Net-A-Porter, Browns Fashion, Matches and so forth — indicate that it sells very, very well (Medine, 2016)</td>
</tr>
<tr>
<td>Gosha Rubchinskiy</td>
<td>Gosha Rubchinskiy</td>
<td>Jackets $550</td>
<td>Dover Street Market reports that they sold through their entire stock of Gosha this season in two days; Comme des Garçons (which also owns Dover Street Market) said the brand’s sales have grown 350% in the last year (Dool, 2016)</td>
</tr>
<tr>
<td>Alyx</td>
<td>Matthew Williams, 2016 LVMH prize nominated women’s fashion label</td>
<td>Leather boots $970</td>
<td>Just after two seasons it built up an enviable stocklist, which includes MACHINE-A, Dover Street Market along with other retail around the globe (Stansfield, 2015)</td>
</tr>
</tbody>
</table>

To be fair, it is not the first time to see streetwear blending with high fashion, but it is arguably the first time that it has had such a major impact on the entire landscape of the fashion industry. The codes of streetwear are redefined by employing luxury-like strategies, building up a strong brand identity and smartly using marketing tools to send out unique messages and images that consumers can align with. Consumers are not just buying the clothing but the lifestyle and community they want to belong to.

What they do against the mainstream is to keep the authenticity of streetwear style, to root with the same cultures as what it originally was, and to give an update version by combining with high-end fashion. They are giving streetwear a new life in a new context.
“The end goal is to modernise fashion and steer a [fashion] house, because I believe in the modernisation of these storied brands,” Virgil says, referencing the arrival of Alessandro Michele at Gucci and Demna Gvasalia at Balenciaga. “I want to prove this new iteration of fashion and use Off-White as a case study for these new ideas that relate to current consumers, because at the end of the day it’s an industry I believe in.” (Morency, 2016)

Western Streetwear defined as a culture movement comes from 80s California influenced by the surf, skate and hip hop scene. It derived from the lifestyle and attitude of a young generation who wanted to speak up against the mainstream and traditional fashion system. Contemporary streetwear hits the mainstream due to the rise of the Internet and celebrity impact. As the result, it lost brand identity and differentiation. The arrival of poststreetwear designers made a difference in the whole fashion industry as they are able to differentiate streetwear from mainstream again by blending streetwear and luxury in a very innovative way. Based on the timeline discussed throughout chapter 2, the most valuable finding about Western streetwear is that the whole process could be divided into three phases. See figure 5. The first phase is about how and why the streetwear culture was born. Generally speaking, it was originally because of the symbolic values, including rebelliousness, self-expression, and breaking established rules, that defined streetwear. In the second phase, it hit the mainstream while lost some of the symbolic values that mentioned above, consequently leading to the fading of brand identity and authenticity of the culture. In the last phase, streetwear brands are working on finding their ways back to the core values, regaining the real spirit and returning to niche market.

**Conclusion**

Figure 4 Left: Off-White Spring/Summer 2017, Right: Off-White Autumn/Winter 2016

Figure 5 Western streetwear timeline
CHAPTER 3
WHAT IS THE SIZE OF CURRENT CHINESE STREETWEAR MARKET?

In this chapter, the external Chinese streetwear market will be analyzed in order to answer the second sub-question. A company always needs to understand the shifting zeitgeist in order to devise their business strategy accordingly. Therefore, the driving external forces of a company’s performance need to be determined. Through the D.E.S.T.E.P. macro trends analysis, creating both opportunities and threats for a company’s operation, have been examined. Furthermore, to define and narrow down the direct market of Chinese streetwear, the depth interpretation of the Chinese streetwear will be discussed. In the end, this chapter concludes in a SWOT of Chinese streetwear market.
External analysis

D.E.S.T.E.P analysis
The table below gives an overview of Chinese market based on the D.E.S.T.E.P analysis.

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Narrowing it down to the target group, according to the tabulation of the 2010 population census of the people’s republic of China (2010), Chinese millennials gives a total of 548 million, in which 174 million are born from 1990s to 2000s. Most of them are the single child in a family because of the one-child policy. Research shows that the emerging middle class in China will continue expanding. It means that more affluent urban customers are able and willing to pay more for premium quality, not just basic necessities. (Barton, 2013) Children born post 90s are more casual and willing to spend money, more ambitious about financial management. This generation takes a more western approach to shopping (McKinsey, 2012) Geographically, in 2002, 40% of urban middle class lived in the Tier-one cities: Beijing, Shanghai, Guangzhou and Shenzhen (McKinsey, 2012), by 2022, the share of megacities will drop and shift to smaller cities in the West or the so called new first-tier cities such as Chengdu, Hangzhou, Wuhan, Nanjing, Chongqing etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic</td>
<td>Between 1980 and 2010, China’s annual real GDP has grown with an average of almost ten percent each year (Guardian, 2016) and has become the second- biggest economy in the world (BBC, 2011). Considering purchasing power parity, China became the highest around the world in 2015 (Central Intelligent Agency, 2016) Nevertheless, there is a slowing down of China’s real GDP growth. Because of the deflating dollar, volatile stock market and many internal external factors, China’s economy is in a downturn at the moment (Financial Times, 2016).</td>
</tr>
<tr>
<td>Socio-cultural</td>
<td>In the traditional Chinese ideology, the contemporary Chinese society is still following the dominant social orders and values. The streetwear culture itself is rebellious. It means to against mainstream, break established rules and targets a niche market, which is contrary to Chinese dominant social values and orders. Thus, the streetwear culture has been having a hard time gaining ground for a very long time. Since the beginning of a new era of economic reformation and opening up to the world policy in China, this great revolution has completely affected people’s behavior, lifestyle and values, especially in the young generation. They are more confident, open minded and determined to display independence through consumption (Sun, 2012). About 20 years ago, streetwear culture spread from Western countries to Asian. After rooting in Japan, South Korea, and Hong Kong, it finally made its way to China’s mainland and started to influence the Chinese</td>
</tr>
</tbody>
</table>
It can be seen that the particular characteristic of Chinese traditional society has a direct effect on the development of Chinese streetwear. Since China’s reforming and opening up, rapid development of economic, people’s thoughts and ideas has greatly changed. In spite of that, the suppression of hip hop by president Jinping Xi as it is believed this type of music is harmful to social morality, in which proves that the concept of streetwear and its related culture are still not yet accepted by dominant society. Nevertheless, along with the rise of Chinese millennials, the leading force in the society soon will shift to this new generation. Chinese millennials’ completely different mindset will be more open to the symbolic values of the streetwear culture. Additionally, flourishing E-commerce and mobile commerce ecosystem provide many potential expand opportunities for Chinese streetwear.
Development status

After understanding how the external market has impacted Chinese streetwear market from a macro point of view, the following paragraphs continue from an insider’s view pointing out the most significant micro trends in the current Chinese streetwear.

Increasing demand for Western streetwear in China
In VF Corporation (an American worldwide apparel and footwear company) most recent financial report (2016), the data shows that the Group’s performance in the US domestic market continued to deteriorate. Yet it is noteworthy that Vans still maintains a strong growth in the niche market. The annual sales increased 6% to about 2.3 billion USD in the Asia-Pacific region over the previous years. China has become the second-largest market in addition to the United State (CNGA, 2016). The scene that large crowds of people waiting outside Supreme London store for a limited release can be also seen in China now. Because too many people came for the Adidas NMD launch event in Shanghai Nanjing road 17th of March 2016, it was canceled one day before the launch. Subsequently, Beijing Sanlitun store also canceled the plan (Guo, 2016).

Base on annual sales report of Adidas Originals, Nike Sportswear and Vans, some investment banking estimated commercial volume of Chinese streetwear market has a scale of 500 billion yuan (Wang, 2017). In the YOHO!BUY evaluation of 2013 Chinese streetwear market (2014) also showed that it has reached 500 billion yuan transactions. The new generation of consumers reflect an increasing demand and desire for streetwear. Looking back at the D.E.S.T.E.P analyses, we see that there are 174 million people; a huge potential market.

Based on research and collected interview data of Chinese millennials, it became clear that there is a shift from mass market to unique niche-type products in the new generation consumer’s buying pattern. Whether they are buying something from a brand really depends on the emotional value (the emotional values associated with a brand determine whether they are going to buy). It also proved that post-1990s are much more westernized than we think in the D.E.S.T.E.P analysis.

“I think China caught on to the so-called ‘streetwear market’ so quickly because all these kids are attaching themselves to it as a movement, more than something that just says, ‘This clothing is made nicely,’ explains the founder of CLOT Edison Chen in speaking with SSENSE. “They want to be a part of something and represent something.” (2017)

Chinese local streetwear brands springing up
In general, there is short of public data and references about Chinese local streetwear market due to the aforementioned relatively late start. Meanwhile, the brand awareness of Chinese streetwear is under highly competitive pressure because of the great development that has taken place beforehand in Western, Japan and South Korea as stated in D.E.S.T.E.P. After comprehensive research into the Chinese current streetwear market, the following paragraph will introduce the local China’s streetwear brands.

Firstly let’s start with two historic brands. In 2008, Orlando Bloom appeared in Manhattan’s film studio with Chinese Warrior sneakers created a buzz throughout the US and Europe. At the same time, the classic collections of Warrior are welcomed by the Chinese domestic underground groups and musicians. Those people saved this Chinese streetwear company from bankrupting. The sales figures soared from less than 150 mil-

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1 USD = 6.9 yuan (19th of April), 500 billion yuan equal to approximate 730 billion USD.
lion yuan to nearly 700 million yuan in 2014. Feiyue is also a Chinese sneaker company in Shanghai founded in 1920. Since 2006, it has been owned by a French company and its products has been brought to the European market. Its collaboration with Celine, André, and Casio has become very popular (Fu, 2016).

Then Let’s look at the contemporary well-established brands. JUICE, a multi-brand concept store, established by CLOT in Hong Kong 2003, has been open its brunch stores in Shanghai, Beijing, Chengdu, Changsha, and Taipei, as well as a pop-up shop in Los Angeles. CLOT has collaborated with many international brands and artists including DISNEY, COCA-COLA, and SCION. JUICE has hosted numerous events including new shoes launches with ADIDAS, CONVERSE, NIKE, RIVIERAS, VANS and VISVIM; book signings for KAWS; and pop-up stores for KITSUNE, HOOD BY AIR, SSUR, and STUSSY (CLOT.com, 2017). The annual turnover has reached 10 million dollars in 2016.

More and more successful Chinese streetwear companies appear in the market, such as Nic’s N.P.C. that has 8 stores now in China, the annual sales of 2016 approximately reached 15 million dollars. Hi Panda, founded by an illustrator Gigi that has 12 stores in Shanghai. It spent 10 million yuan inviting G-DRAGON for the brand endorsement. Devilnut, own by Ying Si Trading company Ltd, has opened more than 140 stores in China since the establishment (Wang, 2017).

On Hua Yi (2013) website’s ‘my favorite Chinese top ten streetwear brand ’ ranking list, the following brands are voted as mainstream Chinese streetwear brands in 2013.

1. STAGE
2. CLOT
3. Nic is coming
4. CRZ
5. Subcrew
6. Theething
7. TAIDU
8. EBLUSH HUNGI
9. MESS
10. Livebox

Furthermore, there are upcoming brands that also target niche market such as Avenue and Son, SOUTHFINNESS, and BEASTER. Meanwhile, there are also brands positioning in luxury market, for example, Xander zhou, Ground zero and Annakiki that can commonly seen on some most famous Chinese celebrities. See figure 6 and 7.
Chinese Icon
In chapter 2, it is discussed how celebrities bring streetwear to mainstream. The way that idols dress up and live their lives are exposed and amplified through a variety of media channels to each corner of the world, rippling through the global fashion world.

Let’s look at the existing icons in China. Edison Chen is the first Chinese streetwear icon who introduced hip hop and street culture to the Chinese mainstream. He is still the most influential person in the industry with the formation of his own brand CLOT now (VICE, 2015). “The spirit of CLOT is about inspiration, rarity, subcultures, alternative lifestyle. We started CLOT 10 years ago when there really weren’t any Chinese Streetwear brands.” (Poon, 2014) Since then, representative cases such as Sam Lee’s Subcrew, Madness from Shawn Yue, Show Lo of Stage, Nic’s N.P.C and so on got on board.

Along with the development of social media, more and more bloggers, influencers and online celebrities appeared. For example, Dayi Zhang with 4.98 million followers, was awarded the no.1 online celebrity in Chinese e-commerce who’s online shop had an annual income of 46 million yuan last year according to Forbes data 2015 (BBC, 2016). Also, Gogoboi with 7.15 million followers and Fil Xiaobai with 1.14 million followers are highly active in the Chinese streetwear market. See figure 8.

Media platform
In chapter 2 it is mentioned that media entities such as hypebeast has grown a lot helping Western streetwear hit the mainstream. Today’s digitalization causes a big shift in the media landscape, but the shrinking of the amount of print copies sold does not eliminate the fact that people still appreciate printed magazine. “Milk” the first Chinese streetwear magazine founded in Hong Kong 2001. To some extend, “Milk” is the first magazine that built up a different content from traditional fashion system in China. Later on, “Urban” (founded in 2002), “YOHO! Chao Liu Zhi” (founded in 2005) came up. Because of the distribution channels and regional culture, it did not cover all of China, but mainly focused on the Southern part of the country. From now on, China’s Internet and related industries have been surging. YOHO online community and YOHO!BUY e-commerce project launched by YOHO Group, and two streetwear pioneer media entities- Hypebeast and highsnobiety appeared on the market. In addition to online channel, YOHO will open a physical store which combines gallery, catering, retailing and lifestyle as a whole in Nanjing as a physical extension of the streetwear community (Wang, 2017). Also, the birth of YO’HOOD, the China’s leading annual streetwear tradeshow in Shanghai 2016, should further validate if the Chinese streetwear is raising global awareness and moving in the right direction (Patos, 2017). See figure 9.
Above all, Chinese streetwear is booming in all different kinds of aspects. From its early days, forming stage to the present outbreak period is just 15 years. As the results of the fast-growing, Chinese streetwear market is facing some problems that need serious attention. The secondary research from interviews done by others show that there are many critical views on existing Chinese streetwear market.

First of all, is the lack of streetwear culture in China. The sociocultural context still is the main and macro factor that has impact on streetwear culture in China as described in the D.E.S.T.E.P analysis. “Talking about the current situation in China, there are many disadvantages in the development of streetwear culture, such as geographical, cultural, social background factors,” said JK, the founder of unsigned (2016).

Secondly, because many Chinese streetwear companies focus on expansion speed and economic benefit, the low concentration in the industry leads to very few particularly distinctive brands. It takes time to build up brand culture and value. So far, many brands are still in the imitation stage. “There is still a big gap between street culture and clothing brand in China. Most of the domestic brands have nothing to do with streetwear culture. The people have been promoting the street culture only by taking action and developing in their own professional areas.” Said Tenyeee, the founder of Southfiness said in an interview (NOWRE, 2016).

Moreover, as for the founders of domestic streetwear brands, many do not have working experience in big companies before, thus they have less professional insight in the production level (materials, structures and patterns) and innovation in supply chain management.

Last but not least, many brands are still focusing on traditional marketing strategies, by simply using celebrities, influencers to expose brands without any consideration of
brand image and value. The domestic mass media are also not supporting own Chinese streetwear brands. Many domestic magazines, concept stores, and celebrities are mainly presenting with foreign brands instead of Chinese domestic brands (Swagdog, 2016).

Conclusion

To sum up and answer the sub-question ‘What is the size of current Chinese streetwear market? ’, please find the SWOT analysis of Chinese local streetwear brands in the Chinese market.

The current Chinese streetwear market is in the phase of the rapid development. Social background is slowly transforming into a context that is more suitable for streetwear expansion. With the popularization of the Internet, especially social media, Chinese millennials show a great demand for Western streetwear brands. As for Chinese local streetwear brands, it is difficult to compare them with foreigner streetwear brands regarding the brand awareness and sales figures. But with more and more Chinese streetwear brands, the rising of diverse online and offline media platforms, and the power of icons and influencers, the current market are showing a promising tendency. Just as Hiroshi Fujiwara, the father of Asian streetwear, said in the interview with Urban magazine at the JUICE launch event in Shanghai (2010), “I think that China’s streetwear culture is very good now, although it is still in a stage of development, as long as we keep making effort, it will soon become very successful.”

Nevertheless, it is worth mentioning that a too fast growth will cause problems in the market. Many companies and founders ignored the importance of street culture and brand value. The industry is too focused on making profits. Without consolidating the culture and symbolic values behind, any brand might have the risk of being eliminated very soon.

### SWOT Analysis

**Strengths**
- Chinese streetwear is a very trendy fashion style at the moment
- Chinese streetwear market is fast growing
- Streetwear is very popular among Chinese celebrities and influencers
- Chinese millennials are highly active on social media

**Weaknesses**
- The streetwear culture is not completely accepted by traditional social context and mainstream concept in China
- Lack of streetwear culture appreciation and symbolic values in Chinese streetwear brands

**Opportunities**
- The rising of target group, Chinese millennials, is a huge potential market
- Booming E-commerce industry and increasing usage of mobile payment

**Threats**
- Competitive pressure from foreign streetwear brands
- Existing substitutes in the Chinese streetwear market
- Fake items in the Chinese streetwear market
CHAPTER 4
WHO ARE THE CHINESE MILLENNIALS?

Previous chapters show that millennials are accounted as a large part involving in the Chinese streetwear market. The following paragraphs will dig deeper into this field through the interview and survey research method, then the third sub-question will be answered through quality and quantity data. In the China’s post 90s generation investigation report of Enfodesk and Tencent QQ (2014), the general characteristic of China’s millennials will be explained. The target population of the survey was people born from 1990-1999 in Mainland China, a total of 8041 valid questionnaires were collected via Internet. Based on the China’s post 90s generation investigation report of Enfodesk and Tencent QQ (2014) data analysis, and the in-depth semi-structured interview with 12 Chinese millennials about their views of streetwear culture, to fully understand the personality and commonality of Chinese millennials in terms of streetwear cognition and online activity. Last but not least, by observing China’s main social media platform Sina Weibo to give an insight into how Chinese millennials react on social media.

Firstly, Let’s start with giving a clear overview of the post 90s generation. In general, there are 174 million people born between 1990 and 1999 in China. Due to the reform and opening-up policy and development of the Internet, Chinese millennials are demanding, open-minded and individualistic. For them, fashion is about self-expression. They care about the emotional values more than just a product, because they have become more self-aware of the identity they convey in consumption. Then, the following paragraphs will explain how this generation related to streetwear.

Streetwear cognition

Since the term streetwear comes from Western countries and there is not that much literature concerning this field in China, one of the research questions in the interview with 13 Chinese millennials, is to find out ‘Do they really know and care about the subculture?’ The interview result shows that it is certain there is a lack of culture recognition in the Chinese streetwear community. Let’s take brand Supreme as an example, which is one of the most representative labels in the whole streetwear landscape. However, Chinese consumers even do not know the correct pronunciation. “They don’t know the brand, they think it’s called Super Me.” Says Hu Peng, who’s better known in China by the moniker Hood P, is Asia’s foremost Supreme collector (2017). Also, in the interview analysis, only 3 people are able to explain properly about the street culture, and one of them is a stockholder of the supreme collection store in Beijing. 6 people said it is just a trend that became popular in Fashion now. The
rest had no idea about the topic. When the interviewees were asked about streetwear brands, foreign brands claimed the top spot in this category, such as Supreme, Palace, Gosha Rubchinskiy, 032c, Bape, Vetements, and OFF-WHITE. As for local Chinese streetwear brands, only 2 people were able to name a few and talk about their view on it. “I don’t know a lot about the local brands, only a few like CLOT, Madness, Gunc, Mess, and MLGB that can be seen everywhere on the street.” (Victor, 2017) 5 people think about brands founded by celebrities or their own friends. 6 people had no ideas about it.

In addition, when discussing the differences between Chinese local brands and Western brands, many reflected Chinese brands are copying and following Western styles, without innovative thoughts and unique characteristics. “Chinese culture is broad and profound, but there is a lack of creativity in the fashion industry, many brands blindly pursue European fashion. But now I see many young Chinese designers rise up in the fashion world has gradually become noticed, to let more people understand China’s fashion culture” (Liu, 2016).

Moreover, all of the interviewees mentioned how celebrities are influencing their fans and consumers, that also can be found in the interview of Hypebeast with Fredrick Li, managing director of D-mop, a Hong Kong-based retailer with its finger on the city’s cultural pulse. His answers towards “What do you attribute the recent streetwear boom in the mainstream China market to? And what factors most influence consumers to spend on high-quality wears?” He mentioned that “It’s all about the trend and what celebrity has worn it” (2017).

Last but not least, 6 out of 13 interviewees are currently studying or working abroad, which proves that China’s millennials are increasingly heading overseas to study. The statistic shows that 459,800 people went to study abroad in 2014, an annual increase of 11.1%, according to the Ministry of Education (Russell, 2016). Chinese millennials are now more educated, knowledgeable, and having more opportunities to explore other cultures globally.

**Online activity**

Since the Internet plays such a significant role in spreading cultural knowledge globally, this part of the report is focussed on the online activity of Chinese millennials. According to China Internet Watch, about 16 million post-90s kids are using the Internet every day, and more than 45% of them use mobile devices to surf and purchase on the Internet instead of a laptop (Zhang, Sinclair, 2016). In the China’s post 90s generation investigation report of Enfodesk and Tencent QQ (2014) indicates the general characteristic of China’s millennials online activity. The target population of the survey was people born from 1990-1999 in Mainland China, a total of 8041 valid questionnaires were collected via Internet. This report shows that 88.5% of Chinese millennials often use mobile Internet. The daily Internet access time of more than half of people is over 3 hours. See figure 10 and 11.

![Figure 10](image_url)
Up to 56.1% of the 90s concerned about entertainment news, in which accounted the highest proportion in the media field. See figure 12.

72.5% of 90s kids are willing to post their personal life on social media platforms. This shows that Chinese millennials are eager to express themselves, to feel related. See figure 14.

It can be seen that the main purpose of using social media, is to facilitate communication with friends (53.6%), followed by making new friends and gaining information. See figure 13.
Social media

All statistics point out the most important facets China’s millennials are online savvy. There is a strong desire of self-expression among them reflected in online activity. They like to share information and communicate with friends. They closely follow entertainment trends, celebrities, and mainstream cultures. For marketeers, it eventually leads to a question where to reach millennials. “You are not going to reach them by buying TV commercials or full-page ads in glossy magazines - you will meet them through product placement on TV and film, you will reach them on social media, if handled the right way.” says Michael Zakkour, Vice President, China/Asia Pacific of Tompkins International (2016).

Thus, the following paragraphs will dig into Chinese millennials social media activities regarding streetwear areas. The posts and user-generated comments were chosen from two major streetwear Weibo account. One is Hypebeast, the most pioneer Western streetwear media entity, and the other is YOHOBUY, the most representative Chinese streetwear company. All data from past 30 days were collected to find out the way Chinese millennials use social media in their everyday lives concerning streetwear.

Chinese millennials like to interact with more inspirational content. Chinese local streetwear account YOHOBUY has higher engagement with Chinese millennials. Hypebeast has 1,548,961 followers with average 20 likes and 5 comments per post, all posts are very simple and just like a short version of its website news, giving information about certain products. Only posts related to local events or celebrities have more comments. While YOHOBUY has 1,122,123 followers with average 150 likes and 30 comments per post. The content are more diverse through not only providing information but also sharing inspirational images including street styles, fashion related moodboards, and interesting videos. Besides, YOHOBUY builds up a very personal relationship with followers through reposting followers’ comments, directly speaking to followers with an informal tone of voice.

The posts in this period mostly contained Western and Japanese streetwear brands. In total, there are around 500 posts in Hypebeast, but only less than 20 posts(4%) mentioned Chinese local streetwear brands. Majority posts are talking about for instance the most recent collaboration between Fragment Design and Louis Vuitton, new sneaker releases of Nike and Adidas, and anything about Supreme, Bape, Vans. The ratios is a little higher in the YOHOBUY with 40 out of 270 posts (14%) that are about Chinese local streetwear brands. Therefore Chinese millennials are mainly influenced by Western streetwear brands rather than Chinese local brands. Consequently, it leads to the lack of brand awareness of Chinese streetwear brands.

Chinese millennials reflect a strong preference regarding their opinions about the streetwear brands in the posts. As for Western streetwear brands, in posts about the collaboration between OFF-WHITE and Air Jordan 1, there are a lot of critical comments such as “It destroys the classic and original style of Air Jordan”, “The collaboration is just about making profits.” While there are also a lot of positive feedback about Vans and Puma sneakers, such as “The pink slipper of Puma are so cute” “Even though Vans is reckless, I still love it so much!”

2 http://m.weibo.cn/2067301197/409419381551777
3 http://m.weibo.cn/1733671614/408116506656310
As for Chinese streetwear brands, such as TYAKASHA and ANB, the related posts have in generally positive comments like, “Supporting Chinese streetwear!” “The most conscientious Chinese streetwear brands!” etc, it seems that the loyalty to those brands has been built among consumers. But in the posts of some brands like Madness 2017 lookbook, you can also find negative comments like “it’s just copy of Western styles”, “you can found the same style in H&M”.

Chinese millennials that interact with brands on Sina Weibo not only to feel connected with brands but also to seek more tangible values, which mainly reflects in informational benefits (product reviews) and emotional expression (make friends). Those people who did buy the products would share their objective feedback with others under the same posts. Additionally, some other people also spontaneous provide purchase channels. There is many data produced by users unconsciously. Also, tend to tag their friends using ‘@’ and create their own conversation in the comments. Instead of talking to the brand, it is a way to communicate and start a topic with their friends.

Conclusion

Information technology and social media have been a hallmark for China’s millennials. With the Internet propagating new fashion styles, it’s easy to spot the influence of streetwear in Chinese youths. But it is obvious that most of them have not yet engaged in the real subcultures and are just blindly following what celebrities and social media influencers’ wear. The way of using social media also reflects that Chinese millennials focus on individuality. They pursue freedom of speech. Meanwhile, they are much less concerned with the perceptions of others except their friends. They really enjoy interacting with friends and communicating via various approaches. They also like personal connections with brands. The purpose of using social media is to gain informational and emotional benefits.

More importantly, from the analysis and comparison of the posts that Western and Chinese streetwear brands have on Sina Weibo, it can be seen that Western streetwear brands are still dominant in China. For example, you can hardly see the promoting of local streetwear brands on the major Chinese media platforms. Consequently, it causes the weak brand awareness of local Chinese streetwear brands. Additionally, from the interview results, foreign brands also claimed the top spot when streetwear brands were asked. And the opinions about Chinese streetwear brands is more negative than positive, which also illustrates the real situation of the current Chinese streetwear market and where it needs to be improved, such as culture cognition and brand values.
**CHAPTER 5**

**FINAL CONCLUSION**

In the conclusion, please find the table above that clearly demonstrate the answer of main research question of the report “What are the main differences between Chinese and Western streetwear brands in China?”. The differences are given from three major aspects as discussed throughout the report: culture & symbolic brand values, Chinese streetwear market and Chinese millennials’ perspective.

The term streetwear originated from Western countries and spread to China afterwards. The main difference between Western and Chinese streetwear brands is social context. Streetwear itself is rebellious. It was created by people who lived against mainstream. But being different from dominant social values and orders is less acceptable in China than in Western countries. The streetwear and its related culture such as hip hop are seen negative in China. Therefore it is very difficult for Chinese streetwear to expand compared with Western streetwear brands.

Fortunately, China is growing in numerous areas that are propagating increased opportunities for streetwear brands to take advantage of. Especially the growing Chinese millennials are slowly transferring the current society into one which is more open to the streetwear culture. More and more young people are realizing the importance

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<thead>
<tr>
<th>Culture &amp; symbolic brand values</th>
<th>Western streetwear brands</th>
<th>Chinese streetwear brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic and original, including deep culture meaning and values</td>
<td>• In the stage of third phase: against mainstream by combining luxury strategies</td>
<td></td>
</tr>
<tr>
<td>Lack of culture and brand values</td>
<td>• In the stage of second phase: being mainstream</td>
<td></td>
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</tbody>
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<table>
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<tr>
<th>Chinese market</th>
<th>Western streetwear brands</th>
<th>Chinese streetwear brands</th>
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</thead>
<tbody>
<tr>
<td>Dominating in the Chinese market</td>
<td>• Streetwear culture not yet being completely accepted in the Chinese social context</td>
<td></td>
</tr>
<tr>
<td>Strong brand identity</td>
<td>• Weak brand awareness</td>
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<tr>
<td>Well established</td>
<td>• A growing trend</td>
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<table>
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<tr>
<th>Chinese millennials’ perspective</th>
<th>Western streetwear brands</th>
<th>Chinese streetwear brands</th>
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<tbody>
<tr>
<td>A fashion trends on social media</td>
<td>• Intimating Western streetwear</td>
<td></td>
</tr>
<tr>
<td>Streetwear comes from West and they are pioneers</td>
<td>• Do not have that much of knowledge and awareness</td>
<td></td>
</tr>
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of culture values in a brand. In addition, the popularity of social media, e-commerce industry, and mobile payment system are helping the market develop fast.

However, it still takes time for Chinese streetwear brands to develop and optimize with China’s own characteristics. Western streetwear brands have a profound cultural foundation in the first place. Most of the brands are pioneers on behalf of the streetwear related subcultures and spirit. The core values of streetwear rooted in all aspects of a brand. According to the process timeline of Western streetwear brands, they started with the symbolic culture values (phase 1) and even though they hitted the mainstream afterwards (phase 2), they ended up with sticking to its authenticity and find the way return to niche market again (phase 3). Yet Chinese streetwear brands are in the stage of being mainstream (phase 2) at the moment. But they skipped the most important and necessary phase one. They are much less concentrating on building up a strong brand identity but instead just mainly imitating the design of Western style, which leads to a lack of brand values and cultural construction.

Furthermore, not only from media promotions but also from consumers points of views, Western brands are dominating in the Chinese streetwear market which is very disadvantageous to Chinese local streetwear brands especially concerning brand awareness. From the research, Chinese streetwear brands also have cool designs and good products, but they gained only a few notice and support.

Speaking of China’s millennials, the primary target group of streetwear, they are much remarkably alike to West in the enthusiastic adoption of the Internet and social media. I myself as one of the typical Chinese millennials is aware of that social media is playing a significant role in our daily life and highly involving in streetwear market. It is worth noting that Chinese millennials are much less engaged in the streetwear culture. Most of them only perceive streetwear as a latest fashion trend discovered online. Thus, they still need to be educated regarding the streetwear culture. From my perspective, instead of being completely blind and following what the latest trends are on social media and what celebrities worn, consumers need to get smart about consumption. They have to change the mind that streetwear brands have to come from West. Since they are becoming more sophisticated and discerning, I believe more Chinese millennials will be interested in local designers who have their own point of views and unique style.
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