



02/08/2024

# REPORT

**Golden Threads: How China's Gen Z is Spinning Luxury Fashion**



## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

**Qualified:** Yes

**Unqualified:** No,



## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## OBJECTIVE

To explore the underlying motivations and attitudes of China's Gen Z consumers towards luxury fashion and accessories, analyzing how cultural values, social influences, and economic status shape their brand loyalty and purchase behavior, while assessing the effectiveness of digital versus traditional marketing strategies in driving their buying decisions.

## BURNING QUESTION

How do China's Gen Z consumers perceive the value of luxury fashion brands and how does this perception influence their purchasing decisions?



## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## CHAT GUIDE

1. How do you think wearing luxury brands changes how strangers perceive you?
2. How often do you shop for fashion items?
3. Where do you usually shop for clothes and accessories?
4. What brands do you think of as luxury?
5. What brands do you personally feel most drawn to?
6. How do you define 'luxury' in fashion?
7. Can you describe your last luxury fashion purchase?
8. What prompted you to choose that particular brand?
9. How important is brand heritage to you when selecting fashion items?
10. Do cultural trends influence your fashion choices?
11. In your opinion, does owning luxury items affect social status?
12. Does the price of a luxury accessory affect your decision to purchase?
13. How much do you think you spend, or what be comfortable spending, on luxury fashion per year?
14. Have you ever felt pressured to buy a luxury brand? Can you elaborate?
15. Do you follow any fashion influencers or celebrities? Why?
16. On a scale from 1-10, how much does brand prestige impact your decision to purchase?
17. Does a brand's online presence (social media, website, etc) sway your purchase decision?
18. Do you think digital marketing affects your view of luxury brands? (social media adverts, etc)
19. What would make you loyal to a luxury fashion brand?
20. What's your take on the future of luxury fashion?



## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## AI SUMMARY

China's Gen Z consumers perceive luxury fashion brands as symbols of high social status, wealth, and a reflection of their personal values and aesthetics. Their purchasing decisions are heavily influenced by the brand's heritage, craftsmanship, unique design, and the cultural philosophy it represents. These consumers shop for luxury items both online and offline, with a preference for official websites and large shopping malls, and they are willing to spend significantly on luxury fashion annually, ranging from tens of thousands to over a hundred thousand RMB.

Brand loyalty is cultivated through alignment with personal values, consistent quality, and positive brand culture, including environmental and social responsibility. Digital marketing strategies, including social media presence and celebrity endorsements, play a crucial role in shaping their perceptions and driving their buying decisions. However, they also express a desire for luxury brands to innovate and cater to diverse groups while maintaining their unique styles and not conforming to mass trends.

The respondents show a strong connection between luxury fashion and their pursuit of a refined lifestyle, with many expressing that luxury items enhance their quality of life and confer respect from others. They define luxury not just by price but by exclusivity, design, and the ability to express individuality. The influence of cultural trends, brand prestige, and the impact of digital marketing are significant, with many following fashion influencers and celebrities for inspiration. The future of luxury fashion is seen as promising, with expectations of more personalized, youthful, and cross-industry collaborations, despite concerns about the global economic situation potentially reducing the number of luxury consumers.





## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## KEY INSIGHTS

### Perception of Luxury as a Status Symbol

- China's Gen Z consumers perceive luxury fashion items as a reflection of social status and financial power, often associating them with wealth, success, and a higher quality of life.
- The ownership of luxury items is seen as a way to showcase one's economic strength and is used as a tool for social positioning within their peer groups.

### Quotes:

"LV means becoming part of the wealthy, successful, and fashionable crowd."

Age 24, Female

"Wearing luxury brands can make people intuitively feel my financial power and social status."

Age 25, Male

"Different price levels of luxury goods reflect different social statuses."

Age 21, Female

"Holding a luxury bag or something like that will reflect your economic strength."

Age 27, Male



## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## KEY INSIGHTS

### Brand Culture and Heritage as Key Factors

- Gen Z consumers in China place significant importance on a brand's culture and heritage, often equating these aspects with authenticity and a sense of timelessness.
- The historical significance and the story behind a brand contribute to its perceived value and influence purchase decisions.

### Quotes:

"I support LV's brand culture more, and it matches my values very well."

Age 24, Female

"Brand heritage is an important consideration when choosing fashion items because it can reflect a brand's uniqueness and history."

Age 22, Male

"It is very important because brands are passed down from generation to generation with the unique style of their founders."

Age 21, Female

"Important, older brands indicate stronger core competitiveness and higher accumulated brand recognition."

Age 25, Male





## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## KEY INSIGHTS

### Influence of Digital Marketing and Online Presence

- Digital marketing strategies, including social media presence and online endorsements, significantly sway the purchasing decisions of Gen Z consumers in China.
- The online representation of luxury brands, through their websites and the use of brand ambassadors, is crucial in building brand image and loyalty.

### Quotes:

"Yes, this is also closely related to the brand ambassadors. The ambassadors of LV and the products they endorse are well-matched in terms of temperament."

Age 24, Female

"Digital marketing can to some extent increase brand exposure, encourage buyers to make purchases, and expand the brand's influence to a certain degree."

Age 22, Male

"Digital marketing is quite powerful now. Many new products are released on social media, allowing us to understand these brands and products more intuitively."

Age 27, Male

"In life, we can all see that subtly we come to feel that advertisements are so high-end, deepening our impression of luxury brands."

Age 21, Male







## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## KEY INSIGHTS

### Economic Status and Spending on Luxury

- While Gen Z consumers in China are willing to invest in luxury fashion, their spending is influenced by their economic status and the perceived value of the items.
- The cost of luxury items is a consideration, but the cultural and symbolic value they represent often justifies the expense for these consumers.

### Quotes:

"I have experienced it. At that time, I just wanted it, but my financial capability did not allow it."

Age 24, Female

"Due to economic pressure at the time, the budget for buying luxury goods was insufficient, leading to a decline in the quality of purchased luxury items."

Age 22, Male

"If the price of a luxury item exceeds my expectations, I will evaluate or choose not to buy it."

Age 27, Male

"Last year, I liked the Hermès brand because my salary wasn't very high at the time. I saved for a very long time to afford it."

Age 22, Male



# PERSONAS

## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?



## The Trendsetting Connoisseur

### Description:

- A 24-year-old female, fully employed, single, and without children, who views luxury fashion as a reflection of a high-quality life and personal success.
- She shops for luxury items every three months, primarily on official brand websites like LV, and is drawn to brands like LV and Balenciaga for their iconic designs and brand culture.
- She defines luxury as a rejection of mass production, valuing symbolic meaning over practicality, and is influenced by cultural trends and social status implications.

### Insights:

- This persona sees luxury goods as a personal reward and a symbol of joining the wealthy and successful elite, indicating that brand culture and alignment with personal values are crucial for loyalty.
- Digital marketing strategies that showcase brand ambassadors with matching temperaments to the products are effective in influencing her purchase decisions.
- She spends significantly on luxury fashion annually and is willing to pay more for items that resonate with her personal values and aesthetic preferences.



## The Classic Aficionado

### Description:

- A 22-year-old male, without children, who prefers timeless luxury pieces and values brand heritage and craftsmanship.
- He shops for luxury fashion items like Chanel and Hermès once a month, both online and offline, and is drawn to brands with a long history and high prices.
- He is not easily swayed by cultural trends, instead opting for classical and textured items, and defines luxury by exclusivity and historical significance.

### Insights:

- Brand heritage and the shopping experience, including private consultants and exclusive spaces, play a significant role in his purchase decisions.
- He is loyal to brands that align with his taste for classical design and has a high annual budget for luxury fashion, indicating a strong connection between luxury purchases and personal identity.
- Digital marketing and brand exposure are factors in his purchasing decisions, but the ultimate loyalty comes from long-term brand culture and experience.



## The Socially Conscious Trendsetter

### Description:

- A 21-year-old female, employed full-time with children, who believes luxury fashion should be fashionable, tasteful, and socially responsible.
- She shops for specific brands like CHANEL every two months at offline counters and is attracted to brands that embody simplicity, uniqueness, and artistry.
- She is optimistic about the future of luxury fashion, expecting it to be more youthful, personalized, and involved in cross-industry collaborations.

### Insights:

- This persona is influenced by fashion influencers and celebrities, such as South Korea's Kim Ji-soo, and is drawn to the elegance and cool demeanor they represent.
- She is willing to spend significantly on luxury fashion and is motivated by the work ethic, indicating that luxury purchases are a form of self-reward and motivation.
- Her loyalty to a brand is contingent on the brand's social stance, environmental practices, and contributions to charitable causes, highlighting the importance of a brand's ethical image.





## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## SAVED SEARCHES

### What specific luxury brands were mentioned?

The specific luxury brands mentioned across the transcripts include:

- Louis Vuitton (LV)
- Balenciaga
- Chanel
- Gucci
- Dior
- Hermès
- Armani
- Sephora
- Saint Laurent
- Burberry
- Prada
- Nike
- Jordan (AJ)
- Fendi
- Celine
- Yves Saint Laurent (YSL)
- Chloé
- Victoria Beckham





## AUDIENCE

### Demographics

China, Age 18 to 27

### Category

Fashion and Accessories

### Custom Screening

Do you own any luxury fashion items?

## SAVED SEARCHES

### Did the respondents mention their favourite luxury brands?

Yes, the respondents mentioned their favorite luxury brands. Here are the brands they mentioned:

- Respondent 1: LV (Louis Vuitton)
- Respondent 2: Chanel
- Respondent 3: Gucci
- Respondent 4: CHANEL
- Respondent 5: LV (Louis Vuitton)
- Respondent 6: Nike
- Respondent 7: Gucci
- Respondent 8: LV (Louis Vuitton)
- Respondent 9: YSL (Yves Saint Laurent)
- Respondent 10: Hermès





**REACH OUT TO US IF YOU HAVE  
FURTHER QUESTIONS ABOUT THIS  
REPORT**

**[chat@boltinsight.com](mailto:chat@boltinsight.com)**

**ESOMAR**  
[member](#)



**[www.boltchatai.com](http://www.boltchatai.com)**

**[linkedin.com/company/boltinsight](https://linkedin.com/company/boltinsight)**