Pulse of China

January 2024

THE HOTTEST TRENDS IN COLDWEATHER FASHION

WHAT WERE CHINESE CONSUMERS RESEARCHING FOR WINTER 2023

REGULAR FEATURES

What were the most searched and viewed topics in the month of November and December in China?

TREND WATCHER

Decode the China Fashion Trends

How do consumers explore and interact with fashion?
How do brands successfully drive interaction?
We look at data from 2022 and 2023 to understand what topics and trends are emerging that will dominate 2024.

Your Monthly update on what Chinese consumers are thinking, feeling and exploring

Brought to you by Searchlight Management Consulting
Data provided by Xiaohongshu (小红书)

Searchlight   小红书

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The hottest trends in cold-weather fashion – what were consumers researching in preparation for Winter 2023?
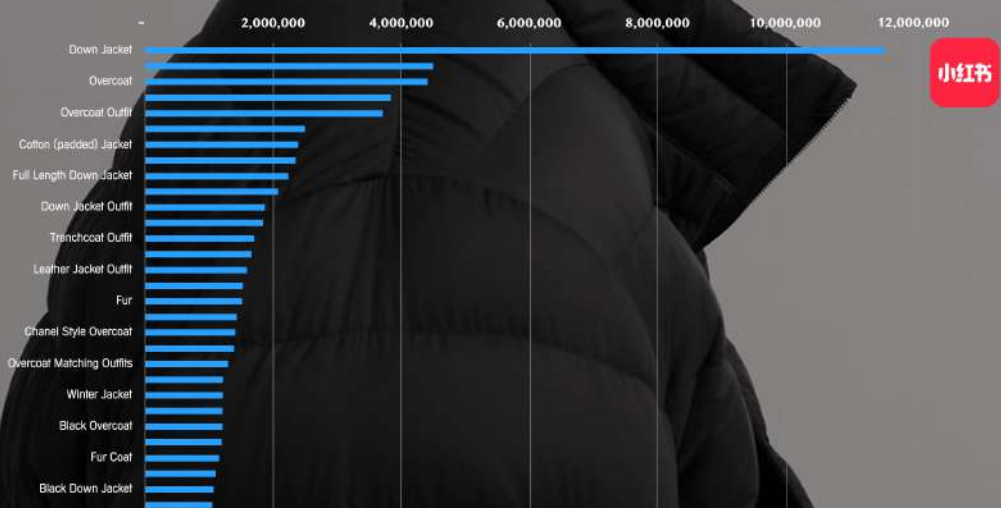
Winter 2023 finally came to China in late December, with greater intensity than in recent years. Shanghai recorded its lowest winter temperature in 40 years.

In preparation for that cold weather, consumers researched various items related to winter wear – our friends at Xiaohongshu tracked searches and posts related to trench coats, jackets overcoats, down jackets, padded cotton coats, woolen coats, furs, leather coats and knitwear or sweaters to provide data for this report.

Note on Data: For this analysis we use Xiaohongshu Search Index, Read index and Post Index data that indicates trends across all parts of the Xiaohongshu site and platform.

1. Down jackets dominate search-terms related to winter fashion

Down is up – most searched item is down jackets
(Other down jacket related searches also feature lower down)

Search Term	Index
Down Jacket	
Overcoat	
Overcoat Outfit	
Cotton (padded) Jacket	
Full Length Down Jacket	
Down Jacket Outfit	
Trenchcoat Outfit	
Leather Jacket Outfit	
Fur	
Chanel Style Overcoat	
Overcoat Matching Outfits	
Winter Jacket	
Black Overcoat	
Fur Coat	
Black Down Jacket	

Scale: - 2,000,000 4,000,000 6,000,000 8,000,000 10,000,000 12,000,000
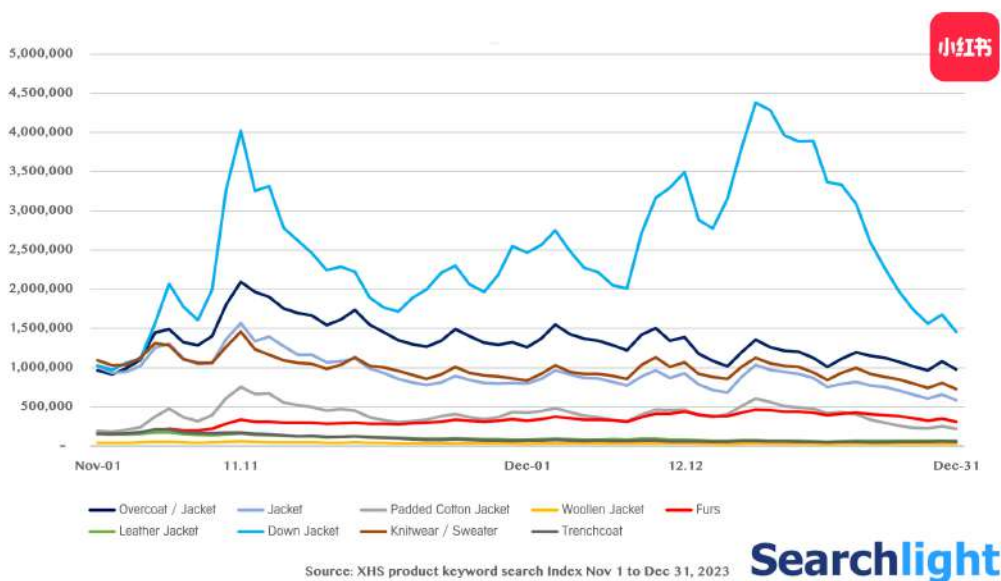
小红书

Source: XHS keyword search Index Nov 1 to Dec 31, 2023

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Image Source / www.uniqlo.cn

Down jackets dominate keyword search – both as a standalone search as well as in relation to what outfits go best with down jackets, color specific or women specific recommendations and so forth. Clearly this subcategory of warm jackets has become dominant in the minds of consumers.

2. Winterwear searches peak around shopping festivals and in deep winter – down jackets dominate

Down jackets most popular – searches peak around 11.11, 12.12 and mid-December when winter really hits

Source: XHS product keyword search Index Nov 1 to Dec 31, 2023

Legend: Overcoat / Jacket, Jacket, Padded Cotton Jacket, Woollen Jacket, Furs, Leather Jacket, Down Jacket, Knitwear / Sweater, Trenchcoat
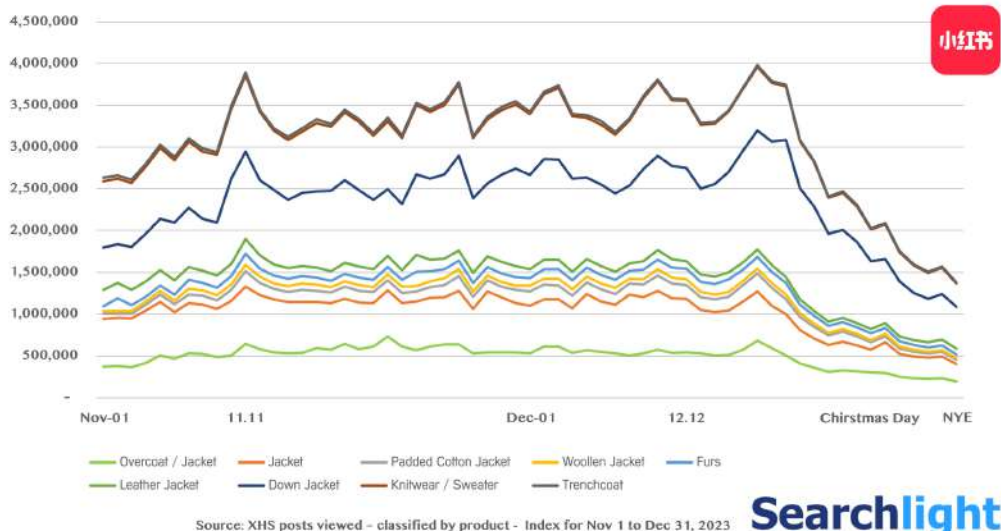
Searchlight

Interestingly, searches all peak before the main shopping festivals of 11.11 and 12.12 – indicating that searches in this category are very seasonal and relate to purchase intent. There is a late peak after mid-December which is when the cold-wave hit, perhaps prompting additional purchases to deal with the unexpected cold snap.

3. Interest in winter-wear related content was fairly consistent until deep winter, by which time presumably consumers have made their purchases for the season.
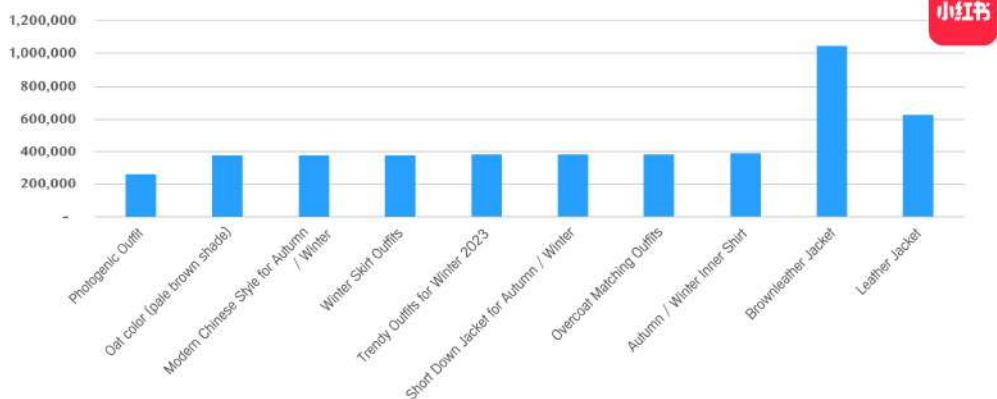
Trenchcoats and Down Jackets are the products that dominate post views - consistent across the period with small peak around 11.11 – falls late December when consumers have made their fashion choices for winter

Source: XHS posts viewed – classified by product - Index for Nov 1 to Dec 31, 2023

Post viewing patterns across different types of winterwear are surprisingly consistent, with peaks and troughs corresponding almost right through. The slight peaks happen around key shopping festivals and a little before Christmas and after that, interest in all these topics seems to drop away very suddenly.

4. Leather jackets dominate post views – is that a trend for the future?

Brown leather jackets are a topic of great interest, followed by leather jackets in general – when looking at post views. However, contrasting these with search behaviour suggests interest without purchase intent

Source: XHS top 10 winter fashion related topics viewed – topics can be defined quite broadly and are not restricted to a specific product / category

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While down jackets dominated search behavior by a big margin, post views are dominated by topics related to brown leather jackets and leather jackets in general. Are these aspirational? Are they seen as fashionable but perhaps, not quite suited for deep winter when down is a more practical material?

Summary

Winter fashion seems to be a subject of intense interest for a short period of time – typically tailing off by late December when China is already deep in winter. Down jackets seem to be the most popular product with the highest number of searches, and this appears to be linked to purchase intent since searches peak around key shopping festivals.

However, purely as a topic of reader interest, a lot of topics related to leather jackets surface as a focus. While this doesn't show up in search (and therefore may not be linked to purchase intent at present), it may indicate a future trend for winter fashion in China.

XIAOHONGSHU
HOT TOPICS
of THE MONTH

The hot topics over November and December in the Xiaohongshu community were mostly year-end themed, although the specific content ranged from makeup to home décor to broad memories of the year. There is also much interest in a "pets and Christmas" themed topic which shows how pet ownership has become a popular trend and an engaging topic with consumers in recent times.

Some of the other top 10 topics that were not connected to Christmas or the year-end were around winter themes – winter hiking plans and a knitting challenge for the winter.

Clearly, the year-end and memorializing the year gone by are topics of significant interest to consumers and activities around these attract a lot of views and (presumably, since many of these asked consumers to post content) also interaction.

Brands that have a specific connection with the winter season or year-end festivities could leverage that consumer interest and introduce themselves in a context that is already very popular and engaging.

Topic	Content description	Views
Home Décor Inspiration 2023	Share what you did with your home to in-spire others with the possibilities for their homes	160 million
My 2023 year-end VLOG	Share your memories so we can archive 2023 in style	75 million

The year in handicrafts	Craft brings beauty to our lives. Share what you made with your own hands this past year	57 million
My year-end manicure	Post your year-end manicure to help compile the most complete list of styles for the year	43 million
Me and my pet this Christmas	Share how you and your pet celebrated Christmas – show us your pet outfits and home decorations	37 million

Data collected on 2024.01.18

TREND WATCHER
DATA REVEALS THE PULSE OF FASHION IN CHINA

Xiaohongshu as a fashion information distribution center, provides us with a large amount of valuable data about fashion trends.

From daily wear to high-end brands, user sharing and discussions on Xiaohongshu are influencing the development of fashion trends. User behavior data on Xiaohongshu provides us with a unique perspective on fashion trends. By analyzing user search, view and engagement behaviors, we can clearly see which styles, colors and brands are gaining popularity. These data not only reflect current fashion trends, but also provide a strong basis for us to predict future fashion trends.

The leading role of fashion bloggers.

Fashion bloggers play an indispensable leading role on Xiaohongshu. They inspire countless fans by sharing their outfits, matching tips and understanding of fashion. Every recommendation and every cooperation from these bloggers invisibly promotes the development of fashion trends.

Brand-consumer interactions are increasing.

The interaction between brands and consumers on Xiaohongshu is also an important part of the formation of fashion trends. Brands interact with

consumers by releasing new products, holding events, etc., and consumers express their preferences through likes, comments, and forwarding. This interaction not only deepens the connection between brands and consumers, but also provides a powerful impetus for the spread of fashion trends.

Chinese celebrities at Paris Fashion Week Men's Fall 2024 / www.gq.com.tw

Deeply involved in fashion discussions, consumer attention for fashion shows has surged: From appreciation to participation.

Posts about "Fashion Week Group Chat" and "Everyone's Fashion Week" related topics, increased 120 times and 125 times respectively, from 2023 September to October. The views of "Dress tips from fashion shows" related topics increased 10 times from January to August 2023 compared with the same period in 2022. The search volume related to the GUCCI show on the Xiaohongshu surged nearly 30 times month-on-month, and the number of live broadcast viewers was more than 250,000.

Users actively generated fashion related content (UGC).

Users love to use social media to record their lives and post their experiences. Diversified offline activities, exhibition halls, tennis matches, music festivals, and citywalks provide immersive experiences that inject

unlimited surprises into life.

"Nóng Hó, Shanghai" Pop-Up Space at Suzhou Creek / eu.louisvuitton.com

Louis Vuitton's "Nonghao Shanghai" ("Hi Shanghai" in Shanghainese dialect, a limited-time experience space) related searches increased 16 times month-on-month, and the number of posts published increased 35 times month-on-month. In line with the #citywalk trend, Lacoste created the "Anfu Road Walking Party", convening bloggers to gather on Anfu Road in Shanghai to showcase the elegant fashion of French sports, capture the minds of users, and help classic brands break out of the box.

Fashion trends that are becoming popular and how brands created momentum or leverage the trends for boosting brand popularity
Image Source / 2023-2024 Xiaohongshu FashionTalk

Interpret fashion with texture and comfort:

People are embracing relaxation, a return to the essence of dressing, using texture to create a "gorgeous" feeling, and enjoying effortless fashion; low-key with quality. The relaxed and comfortable sense of fashion has become the expression of the pursuit of a comfortable life. Searches for the keyword "cozyfit" from January to October 2023 increased 12.5 times v.s. that in 2022; the local brand "ZHIZHI" fully integrates oriental heritage and contemporary beauty, and uses a white porcelain skirt to drive brand popularity to increase by more than 3 times month-on-month. The popularity of comfortably textured items has soared. For example, searches for Birkenstock shoes from January to October 2023 increased 4.8 times year-on-year.

Chinese fashion brand "ZHIZHI" white porcelain skirt / brandstar.com.cn
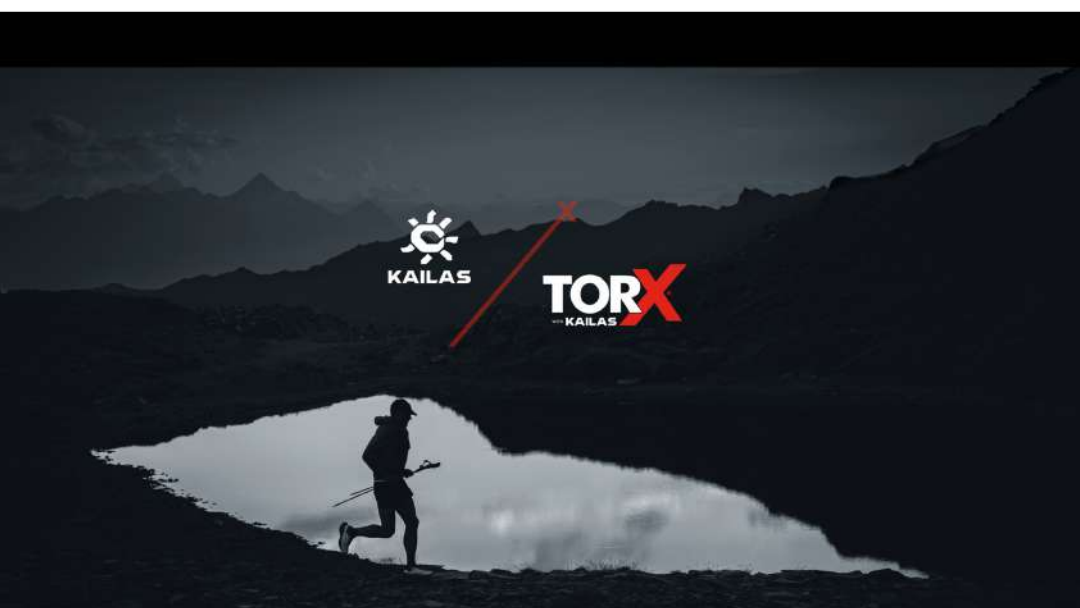
The rise of textured and pragmatic dressing:

The rise of "HE" style, from urban socializing to outdoor sports, from elite business style to dynamic trendy style, releasing multi-faceted charm. The BOSS premium series invited celebrity Lee Min Ho to interpret mature styles, create classic styles, and reveal the dressing rules of high-quality men. The average daily number of brand fans has increased by 5 times and the monthly view of brand content has increased by 60%+ month-on-month.

HUGO BOSS Fall / Winter 2023 Campaign starring Lee Minho / vogue.com.tw

Outdoor wear and sports trend sweeps.

Chinese young people expect to gain emotional value and natural experience from outdoor activities. It has driven the rising trend of various outdoor sports and also led the fashion trend of outdoor style. Kailas launched a hard core challenge for outdoor enthusiasts to reach their first snow mountain in life. The brand's monthly search popularity increased by 320% v.s. November 2023, turning the mountains and fields into a "fashion venue".

KAILAS initiated a series of programs in China including "Snow Mountain Summit Project" / KAILAS WeChat Official Account

Xiaohongshu - Xiaohongshu（小红书）is a platform for consumers to search, read and share authentic content about all kinds of product categories and lifestyle related experiences and services. On Xiaohongshu, 90% of content on the platform are UGC (user-generated content) coming from ordinary users. Xiaohongshu has truly become the trusted source where ordinary people turn to for making consumption decisions. Its average number of searches daily has exceeded 300 million. While brands and companies can have corporate accounts and post content of their own, there

is no option to "boost" their rankings or views using advertising money, thus letting Xiaohongshu serve as a barometer of uncontaminated consumer behavior.

As of the end of 2022, there were over 260 million monthly active users and 69 million content creators on Xiaohongshu sharing about their lives. Users engage through authentic, interesting and useful content, building a relationship based on trust. They share, discuss and are constantly "seeding recommendations" about their favorite products and lifestyle trends. 70% of users are from the post-90s generation, and 50% of users come from first-and second-tier cities in China, representing strong spending power. Consumers can directly engage with a feed based on

topics they are interested in, follow certain specific content creators or influencers, or search for

content on specific topics and subtopics.

Marketers can look at broad sweep statistics to get a sense of what's hot in their category,

which brands / segments / consumer needs and questions are most current. They can examine what content consumers are engaging with, separate brand content from UGC, and see consumer trends expressed in posts, content views, and searches.

If you want to know more about Xiaohongshu, come and explore our consumer experience for yourselves via the web on https://www.xiaohongshu.com/en, and Instagram, Twitter(X) and YouTube.

the platform, the users, and the consumers

ABOUT
XIAOHONGSHU

ABOUT US
Search**light**

Set up in early 2020, Searchlight is a boutique management consulting firm headquartered in Shanghai.

Our typical scope of work covers:

 a. Market and consumer analysis to identify opportunities

 b. Defining business strategy and business model to leverage these opportunities

 c. Brand architecture, proposition and positioning to deliver the strategy

Our team of 14 associates covers a wide range of specialist areas – marketing, advertising, media, content marketing, brand management, HR, CRM, sales management, technology, and business management. Each of us has at least 20 years of work experience, a large part of that in China.

We coach and assist client teams to make quality decisions for the business. We also assist in the design of organizational processes and financial models, especially building internal and external capabilities for strategy implementation.

We've worked with both international and local brands, startups and public listed companies - J&J, Hollister Medical and Pandora as well as Sunner Foods (a listed company that leads the food processing category with a 40-year history) and startups like Little Ondine, LeBunna and Unibrown.

For more about us visit **www.searchlightchina.com**

If you want to convert information into usable insights and strategy, contact us:

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