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The Characteristics, Structure and Trend of the Chinese Urban and Rural Residents' Clothing Consumption

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Abstract As one of the necessities of life, clothing is on the important position in the daily life of urban and rural residents. Firstly, the paper carries out the descriptive statistical analysis about clothing consumption expenditures of urban and rural residents; secondly, based on questionnaires of 543 urban and rural residents in 16 provinces, this paper analyses structure and trend of urban and rural residents' clothing consumption. The results show that per capita clothing consumption expenditure of urban and rural residents present growth on the whole, but the gap between the two is gradually expanding; clothing consumption expenditure have differences in different regions; the differences of different income levels are also obvious; urban and rural residents' clothing consumption structure tends to be more diversified, cotton goods and chemical fiber goods is the main variety of clothing consumption, including down feather, cotton and chemical fiber is the main variety of coat, and cotton, chemical fiber and wool is the main variety of suit and knitwear; cotton goods, down goods and woolen goods will be the fiber goods that urban and rural residents buy more in the future; clothing consumption demand will pursue for band, comfort and personality; female residents will still be the main force of clothing consumption. Finally, the paper puts forward some recommendations on the basis of analysis results.

Key words Urban and rural residents, Clothing consumption, Characteristics, Structure, Trend

1 Introduction and literature review

With the continuous improvement of living standards, the Chinese urban and rural residents' clothing consumption expenditure continues to increase, and the clothing consumer behavior and consumer preferences have changed dramatically, so the basic function of clothing commodity can not meet the consumption demand.

And in recent years, in the context of economic crisis, RMB appreciation and rising production costs, China's textile and garment export growth is slowing, and urban and rural residents' consumer demand has become an important driving force of economic growth for China's textile industry. Therefore, under the above background, research about urban and rural residents' clothing consumption characteristics, structure and trend avails for guiding textile enterprises to clear target market positioning and to develop marketing strategy, thereby promoting the healthy and continuous development of the whole textile industry. The literature on clothing consumption at home and abroad is mainly focused on the analysis of consumption structure and trend of a particular clothing product for the Chinese urban and rural residents, and the quantitative analysis of relationship between clothing consumption and income, prices using the econometric models.

Hu Bin (2000) argues that since the reform and opening up, the proportion of Chinese residents' clothing consumption expenditure to the total consumer spending has declined, and the internal structure of clothing consumption has shifted from the emphasis on intrinsic quality to the emphasis on external quality^[1]. Zhang Taiyuan (2007) analyzes the changes in Beijing urban residents'

clothing consumption, and points out that Beijing residents' clothing consumption is entering the personalized period from the transition period^[2]. Zhu Gaolin (2010) points out that with the continuous development of China's economy and people's increasing income levels, the urban residents' clothing consumption has experienced three stages (wearing clothes for warming, following the fashion and showing personality), and the clothing consumption shows personalized and casual trend^[3]. Liu Xiaohong (2012) carries out the empirical analysis of the Chinese rural residents' clothing consumer demand, and points out that the Chinese rural residents' marginal propensity to consume clothing is low and shows an inverted U shape, indicating that rural residents' clothing consumption is a basic survival need, and has not reached the spiritual needs^[4]. Based on the survey questionnaires, Fan Zhongmei and Chen Yan (2003) analyze the characteristics of men's wear consumers and the product structure demand from both objective and subjective factors, and draw the conclusion that there is a gap between the actual product consumption structure and product supply structure in Chinese casual men's wear retail market^[5].

Through the empirical analysis, Li Jian (2010) finds that during the transition period, the impact of income on the Chinese urban residents' clothing consumption gradually decreases, and it is more sensitive to price fluctuations, while the impact of clothing consumption fluctuations in the previous period on the current clothing consumption expenditure constantly wanes^[6]. Zhang Lu and Zhao Pan (2012) analyze the impact of the income gap on rural residents' clothing consumption in Jiangsu Province, and find that rural residents' clothing consumption expenditure is significantly correlated with per capita net annual income, and people with high income have begun to enter the spiritual dimension of clothing needs^[7].

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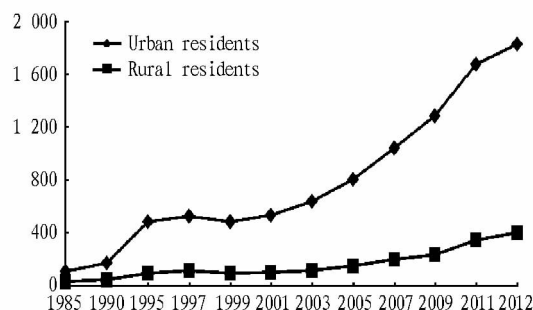
On the basis of analyzing annual changes in the level of the Chinese urban and rural residents' clothing consumption, this paper uses the questionnaire survey data about 543 urban and rural residents in 16 provinces, cities and autonomous regions, to analyze urban and rural residents' clothing consumption structure and trend, and finally comes up with the corresponding recommendations for optimizing the Chinese urban and rural residents' clothing consumption structure in accordance with the conclusions.

2 Analysis of the Chinese urban and rural residents' clothing consumption characteristics

2.1 The Chinese urban and rural residents' per capita clothing consumption expenditure shows an overall rising trend and the clothing consumption gap gradually expands

From Fig. 1, it can be found that during 1985–2012, the Chinese urban and rural residents' per capita clothing consumption expenditure showed an overall growth trend, and the urban residents' clothing consumption expenditure was always higher than rural residents' clothing consumption expenditure. Although the Chinese urban and rural residents' per capita clothing consumption expenditure continued to grow, the clothing consumption expenditure gap was gradually expanded.

In 1985, the Chinese urban residents' per capita clothing consumption expenditure was 3.34 times that of rural residents, and in 2012, this gap widened to 4.60 times. Thus, it indicates that the Chinese urban and rural residents' per capita clothing consumption expenditure shows an overall rising trend and the clothing consumption gap gradually expands.



Data source: China City (Town) Life and Price Yearbook, China Rural Household Survey Yearbook, China Statistical Yearbook 2013.

Fig. 1 The Chinese urban and rural residents' per capita clothing consumption expenditure (Unit: yuan/person)

2.2 There are differences in clothing consumption expenditure between different regions As can be seen from Table 1, there are differences in the clothing consumption expenditure between different regions. Specifically, as for the rural residents, the per capita clothing consumption expenditure is the highest in the eastern regions, about 557.67 yuan/person, and the per capita clothing consumption expenditure is the lowest in the western regions, about 344.25 yuan/person; as for the urban residents, the per capita clothing consumption expenditure is the highest in

the eastern regions, about 1859.82 yuan/person; and the per capita clothing consumption expenditure is the lowest in the central regions, about 1711.56 yuan/person.

For various provinces, the urban and rural residents' per capita clothing consumption expenditure is not the same. From Fig. 2, it is found that the urban residents' per capita clothing consumption expenditure is the highest in Inner Mongolia, reaching 2730.23 yuan/person, while the urban residents' per capita clothing consumption expenditure is the lowest in Hainan, reaching 864.96 yuan/person.

The reason may lie in the following two aspects:

(i) Differences in climate and environment. Hainan is located in China's southernmost part, with four warm weather seasons, while Inner Mongolia is in the northern region, with cold winters, so the local residents spend more on clothing to resist coldness.

(ii) Differences in the level of economic development. Inner Mongolia, as a western region, has a low level of economic development, and the urban residents spend less on food, culture, education and entertainment, while Hainan in the eastern part has a relatively high level of economic development, urban residents spend less on clothing but more on others.

Consequently, the differences in urban residents' clothing consumption expenditure are not only related to the climate, but also related to local economic level as well as other categories of living consumption expenditure.

Table 1 The urban and rural residents' per capita clothing consumption expenditure in different regions in 2012 (Unit: yuan/person)

	Urban residents	Rural residents
Eastern regions	1859.82	557.67
Central regions	1711.56	397.57
Western regions	1759.72	344.25

Data source: China Statistical Yearbook 2013.

Note: The eastern regions include Beijing, Tianjin, Hebei, Liaoning, Shanghai, Jiangsu, Zhejiang, Fujian, Shandong, Guangdong and Hainan; the central regions include Shanxi, Jilin, Heilongjiang, Anhui, Jiangxi, Henan, Hubei and Hunan; the western regions include Inner Mongolia, Chongqing, Sichuan, Guizhou, Yunnan, Tibet, Shaanxi, Gansu, Qinghai, Ningxia, Xinjiang and Guangxi.

2.3 There are prominent differences in the urban and rural residents' clothing consumption between different income groups

Due to different income levels, there are prominent differences in the urban and rural residents' per capita clothing consumption expenditure, and such differences are particularly obvious between low-income households and high-income households. Urban residents' income is positively correlated with clothing consumption expenditure.

The per capita clothing consumption expenditure of urban residents with the lowest income is 706.80 yuan, while the per capita clothing consumption expenditure of urban residents with the highest income is 3928.48 yuan, a difference of 6.08 times. Rural residents' per capita clothing consumption expenditure also gradually increases with the income increase.

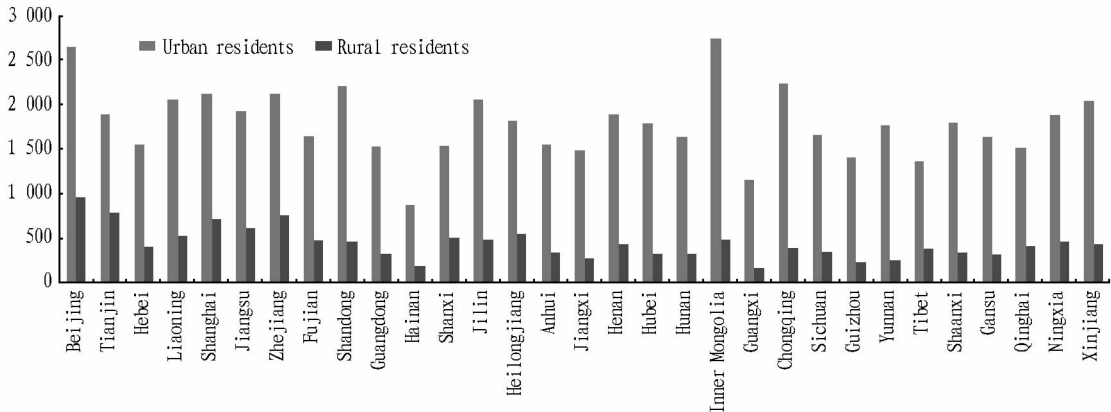
The per capita clothing consumption expenditure of rural resi-

dents with the lowest income is 245.87 yuan, while the per capita clothing consumption expenditure of rural residents with the highest income is 618.4 yuan, a difference of 2.97 times, as shown in Table 2.

3 Analysis of the Chinese urban and rural residents' clothing consumption structure

3.1 The urban and rural residents' clothing consumption structure becomes increasingly diversified With the economic

and social development and improvement of people's living standards, the Chinese urban and rural residents' clothing consumption structure becomes increasingly diversified. According to survey data, the proportion of respondents purchasing cotton products, chemical fiber products, wool products, cashmere products, feather products, hemp products and silk products accounted for 91.90%, 55.80%, 81.03%, 43.09%, 73.30%, 15.65% and 23.02%, respectively in 2012.



Data source: China Statistical Yearbook 2013.

Fig.2 The urban and rural residents' per capita clothing consumption expenditure in various regions in 2012 (Unit: yuan/person)

Table 2 The per capita disposable income and clothing consumption expenditure of urban and rural residents with different incomes in 2012 (Unit: yuan)

Different income groups	Urban residents		Rural residents	
	Per capita disposable income	Per capita clothing consumption expenditure	Per capita disposable income	Per capita clothing consumption expenditure
The total average	24 564.72	1 823.39	7 916.58	396.39
Low-income group	10 351.86	876.15	2 316.21	245.87
Below-average group	16 761.43	1 408.21	4 807.47	287.33
Middle-income group	22 419.1	1 765.93	7 041.03	358.09
Above-average group	29 813.74	2 213.83	10 142.08	465.83
High-income group	51 714.69	3 347.99	19 008.89	717.62

Data source: China Statistical Yearbook 2013.

Note: The classification method for different income groups of urban and rural residents is to divide all respondents into low-income group, below-average group, middle-income group, above-average group, and high-income group according to the per capita disposable income.

First of all, due to excellent performance, the cotton fiber becomes one of the most commonly used textile materials, involving clothing, footwear, home textiles and other fields.

Secondly, the chemical fiber plays an important role in the available fiber, which includes not only inexpensive polyester, acrylic fibers, but also some high quality chemical fiber products. It means that the current chemical fiber involves not only the low-end consumer market but also high-end market.

Thirdly, the wool and cashmere products have natural advantages in terms of ventilation property, moisture absorption, warmth retention property, thermal resistance and flexibility, and with the improvement of processing technology, the types of products increase. In addition to the traditional wool products, the wool quilt, wool carpet, wool thermal underwear, vest, knee pads, and

other wool products is gradually becoming consumers' new demand.

Finally, the down not only has excellent heat resistance and elasticity, but also has light texture and durability, so the down jacket, eiderdown and other down products are increasingly favored by consumers; because of unique health care function, hemp fiber is increasingly used for casual clothing and bedding article, and the consumers gradually increase spending on such product; due to lightness and warmth retention property, the silk occupies a certain market share in silk clothing and bedding article.

3.2 The cotton products and chemical fiber products are the major clothing consumption varieties for urban and rural residents According to Table 3, it is found that the top three types of clothing consumed by the respondents in 2012 in terms of per

capita purchase are cotton products, chemical fiber products and wool products (3.79, 2.71 and 2.38, respectively).

The per capita purchase of cotton products is 59.24% more than that of wool products, but the per capita consumption of cotton products is 24.04% less than that of wool products; the per capita purchase of chemical fiber products is 13.87% more than that of wool products, but the per capita consumption of chemical fiber products is 69.63% less than that of wool products.

It can be seen that the cotton products and chemical fiber products are the major clothing consumption varieties for urban and rural residents, due to the natural, comfortable textile characteristics of cotton products and stylish feature and relatively low prices of chemical fiber products.

3.3 Down, cotton and chemical fiber are the major consumption varieties for urban and rural residents' coats, and cotton, chemical fiber and wool are the major consumption materials for suits and sweaters Coats, suits and sweaters are the major types of clothing that urban and rural residents spend on. According to Table 4, it is found that the down, cotton and

chemical fiber coats are the major consumption varieties for the respondents, and cotton, chemical fiber, wool are the major consumption materials for suits and sweaters in 2012.

Specifically, the per capita purchase of cotton and down coats is higher than that of chemical fiber coats; the per capita purchase of cotton and chemical fiber suits is much higher than that of wool suits; the per capita purchase of cotton and chemical fiber sweaters is 1.57 and 1.16 times that of wool sweaters, respectively.

Table 3 The respondents' clothing consumption in 2012

Clothing consumption varieties	Per capita purchase	Per capita consumption (yuan)
Cotton products	3.79	820.13
Chemical fiber products	2.71	327.85
Wool products	2.38	1079.66
Cashmere products	0.73	523.06
Down products	1.05	714.56
Hemp products	0.33	77.42
Silk products	0.40	126.93

Data source: The survey questionnaire.

Table 4 The per capita purchase and consumption of coats, suits and sweaters in terms of different materials in 2012

The main material	Coats		Suits		Sweaters	
	Per capita purchase	Per capita consumption//yuan	Per capita purchase	Per capita consumption//yuan	Per capita purchase	Per capita consumption//yuan
Wool	0.33	280.93	0.07	107.31	0.82	362.90
Cashmere	0.07	74.03	0	0	0.34	253.91
Cotton	1.38	416.31	1.35	31.98	1.29	230.56
Chemical fiber	0.55	120.12	0.23	43.10	0.95	84.92
Hemp	0.11	33.13	0	0	0.08	19.30
Down	0.97	664.61	0	0	0	0

Data source: The survey questionnaire.

4 Analysis of the Chinese urban and rural residents' clothing consumption trend

4.1 The cotton, wool and down products will be the fiber products consumed considerably by urban and rural residents in the future Table 5 shows that 48.43% of respondents list the cotton products as the primary choice in the future consumption of fiber products; 21.55% of respondents list the wool products as the primary choice; 12.15% of respondents list the down products as the primary choice. It indicates that cotton products, wool products and down products will be the fiber products consumed considerably by urban and rural residents in the future.

Table 5 The proportion of top three types of respondents in terms of increase in the future consumption of major fiber products %

Type of textile products	The first place	The second place	The third place
Wool products	21.55	17.50	22.28
Cashmere products	10.87	16.57	12.34
Cotton products	48.43	19.89	16.21
Chemical fiber products	4.23	13.08	9.94
Hemp products	0.74	4.05	7.73
Silk products	2.03	5.52	8.29
Down products	12.15	23.39	23.21

Data source: The survey questionnaire.

The cotton products have a large share in the current fiber products and the excellent characteristics make the cotton products become the first choice of urban and rural residents' clothing consumption; due to the unique natural features and diverse styles, the wool products are increasingly favored by the residents; due to the lightness and warmth retention property, the down products can be considered by the urban and rural residents in both peak season and off-season.

4.2 The urban and rural residents' clothing consumer demand shifts to brand, comfort and personalized directions

With the economic development and social advancement, urban and rural residents' disposable income constantly increases, the individual's ability to choose gradually increases, and there is also a shift in consumer psychology. The urban and rural residents' clothing consumer demand shifts to brand, comfort and personalized directions. According to field research and survey, we learn that the majority of consumers believe that the brand wool sweater enjoys a good reputation, and high quality.

It can be seen that the urban and rural residents' clothing consumer demand gradually shifts to brand directions. When purchasing the wool sweaters, the respondents think comfort is the primary factor to be considered. The clothing comfort has become a major clothing consumption demand of urban and rural residents.

In addition, with the development of the times and improvement of people's living standards, people's clothing consumption awareness is gradually changing. Not only do the youth groups require new clothing styles, but also middle-aged and elderly groups consider the style, color and other factors in the choice of clothing. Therefore, the clothing well reflecting personality can better meet the consumer demand of the community.

4.3 Female residents will continue to be the main consumer of clothing With the development of social economy and increase in social openness, the social status of women is increasingly elevated, and the majority of women are economically independent, with higher ability to dispose household income.

At the same time, women's life attitude has also undergone a big change, and they pay more attention to improving the quality of life, and pursue the classy home life. They are particularly concerned about clothing and accessories that can show their spirit and appearance. According to the survey data, women's per capita consumption of wool products is 1263.40 yuan, and the per capita purchasing amount is 2.84, 1.46 and 1.54 times that of men, respectively.

This shows that female residents are the major consumers of wool products. At the same time, it can be also seen that the Chinese female residents attach great importance to the consumption of wool products and the female residents will continue to be the main force of clothing consumption in the future. From the current structure and layout of commodities in most department stores, we can see this trend, and female clothing commodities occupy larger sales area than other categories of goods.

The display of goods and services are also different from other categories of goods in order to fully cater for the tastes of female consumers.

5 Conclusions and policy recommendations

5.1 Conclusions In this paper, we analyze the Chinese urban and rural residents' clothing consumption expenditure, structure and trend.

The results show that the Chinese urban and rural residents' per capita clothing consumption expenditure shows an overall rising trend and the clothing consumption gap gradually expands; there are differences in clothing consumption expenditure between different regions; there are prominent differences in the urban and rural residents' clothing consumption between different income groups; the urban and rural residents' clothing consumption structure becomes increasingly diversified; the cotton products and chemical fiber products are the major clothing consumption varieties for urban and rural residents; down, cotton and chemical fiber are the major consumption varieties for urban and rural residents' coats, and cotton, chemical fiber and wool are the major consumption materials for suits and sweaters; the cotton, wool and down products will be the fiber products consumed considerably by urban and rural residents in the future; the urban and rural residents' clothing consumer demand shifts to brand, comfort and

personalized directions; female residents will continue to be the main consumer of clothing.

5.2 Policy recommendations

5.2.1 Continuing to raise the income level of urban and rural residents to stimulate the domestic residents' clothing consumer demand. In the context of downturn in the international market, in order to stimulate Chinese domestic residents' consumer demand for clothing, it is necessary to further increase the incomes of Chinese urban and rural residents, especially those low-income families with no real ability to spend on clothing after solving the basic problem of food and clothing.

Only by doing this can we improve the overall level of Chinese urban and rural residents' clothing consumption and promote the optimization of clothing consumption structure.

5.2.2 Emphasizing the integration of clothing consumption and green consumption, and increasing the investment in research and development. With the deepening understanding of sustainable development and green consumption and increasing awareness of health, people make higher demands on the ecological and functional features of clothing. The survey results of survey company commissioned by Australian Wool Innovation (AWI) show that "health" has become one of the 14 factors that people are concerned about when consumers purchase clothing^[8].

China's garment industry should pay attention to the integration of clothing consumption and green consumption. In the production and purchase of textile raw materials, design and processing of clothing, it is necessary to consider the environmental requirements, increase R & D investment, and actively introduce foreign advanced technology.

5.2.3 Attaching importance to the personalized clothing consumption trends, and carrying out the product innovation. With the improvement of Chinese urban and rural residents' consumption level and change of consumer attitudes, the clothing reflecting the personal characteristics is becoming increasingly popular.

Therefore, the garment enterprises should pay attention to the trend of personalized clothing consumption, improve the level of product design, develop personalized, stylish and multi-level high-grade products based on the actual situation of enterprises and market demand, and combine the customized clothing production and large-scale operation to make the clothing market supply better adapt to the changes in urban and rural residents' clothing consumption demand.

5.2.4 Strengthening the brand building and increasing added value of product. At present, there are leading enterprises and also small and medium enterprises and family businesses in the Chinese clothing processing enterprises. It is necessary to support the development of backbone processing enterprises, cultivate the core competitiveness and brand advantage, and create the internationally renowned brand with proprietary intellectual property rights, to increase the contribution rate of science and technology and brand.

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All enterprises should strengthen brand building, constantly inject the spirit of the brand into the product development, manufacturing operations, marketing channels and advertising, and build the unique brand culture, to constantly increase the clothing brand value and improve competitiveness in international markets.

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