Since the end of the 1990s, along with a rising income level, the purchasing power of consumers has been increasing rapidly. Clothing expenditures have also been growing fast since most Chinese people are happy to spend their incomes on food and clothing.

At the beginning of the 21st century, the majority of clothing companies focused on building marketing channels and finding franchisees to expand their distribution network. A group of youngsters set up the brand “Mark Fairwhale” and pursued their dream of creating a first-class fashion brand in China.

“Even at the beginning of building the brand, we refused to be copycats. We advocated creativity and fashion in design. We refused to gain market share through opening as many franchised stores with homogeneous products as possible.”

- Kelvin Yang, CEO Mark Fairwhale

Ten years later, Mark Fairwhale has become one of the most famous fashion brands in China, while many past competitors have faded away in the mechanism of selection through competition. Despite the impact of the financial crisis, Mark Fairwhale kept a 25% revenue growth rate in China and started expanding internationally. The first stop was Singapore. In the next few years, Mark Fairwhale will not only keep expanding the business nationally with the main focus on second-tier cities and third-tier cities, but also expanding the business internationally with a main focus on the South East Asian market.

Introduction

Mark Fairwhale, established in 2001, is an original fashion design brand created by Mr. Mark Cheung, a fashion wizard and definitely one of the most talented designers that the modern China fashion industry has ever had. His reputed status as the fashion guru is always reflected in the company’s creative spirit. Each letter in “Fairwhale” represents one word to convey the culture of the brand: Fly, Amenity, Intelligence, Responsibility, Will, Harmony, Adolescent, Love, and Envision.

Over the years, Mark Fairwhale has created three outstanding apparel sub-brands and a tight-knitted superior distribution network across China. The three brands are Mark Fairwhale International Vogue Men’s Wear, Fairwhale JEANS for Men, and Fairwhale Creative Urban Wear (formally known as <Fairwhale Jeans Girls>) [see Appendix 1 for the comparison among the three brands; see Appendix 2, 3, and 4 for the advertising of the three brands respectively]. The three brands have clear market positioning and target customers respectively. Each brand has a separated Brand Identification System including a distinct brand image, a different brand logo, and a separated store decoration style.

Mark Fairwhale’s headquarters in Shanghai houses about 300 employees. Headed by CEO Mr. Kevin Yang, one of the founders of the company, this young team, with each

1 http://content.chinasspp.com/News/detail/2010-3-22/84944.htm
2 http://www.cnxz.cn/dealer/news/200911/10/2013.html
employee averaging 28.5 years of age, has achieved great success. From a local company with sales around $1.3 million in 2001 to a multinational organization with sales in excess of $220 million in 2009, and from 40 stores in 2001 to over 900 stores in 2009, Mark Fairwhale is expanding its business successfully in China.

**Apparel Industry in China**

China’s apparel industry has witnessed tremendous growth since the initiation of China’s market reforms. China is the No.1 apparel producer and exporter in the world. During the past three decades, rising incomes and improving living standards have made great contributions to a stable increase in the demand for clothing.

![China’s apparel trade](image)

The consumer expenditure on clothing exceeded $103 billion in 2009, compared with only $45 billion in 2004. Besides the significant increase, there is still a great potential of growth in the apparel market in China because Chinese consumers’ expenditure on clothing is far less than that of developed countries such as the United States, despite the fact that China has a much bigger population.

**Consumer Market**

Market reforms and open door policies have brought a massive change in Chinese consumers’ tastes, needs, and clothing styles. Before the market reformed, individuals in China were encouraged to think alike and dress alike in order to put everyone on an equal footing. As a result, there were mainly three types of clothing divided by occupation: military uniform, Chinese tunic suit, and school uniform. There were also four main colors; blue, black, gray, and white that dominated people’s wardrobes. Under the shortage of cloth supply, people needed both fabric stamps and money to buy fabric and then made uniforms by tailors. After the implementation of the open-door policy in 1978, Chinese consumers started to pursue better individual clothing styles and chose apparel for different occasions, rather than “one suit for all”. The Chinese people have gradually regained the freedom of deciding how they want to dress on an individual basis, and it increasingly becomes more affordable to wear different apparels for various occasions rather than “one suit for all.” Gradually, uniforms have lost their popularity, while western suits, ties and dresses are becoming very popular in China (Appendix 5). Western suits have become standard business attire in China. People in all classes from national leaders to individual laborers are wearing suits. Accordingly, the apparel industry is divided into different market
segmentations by age, clothing style and occasion.

Appendix 6 shows the market share of different apparel products and demographic groups. The product segmentation is based on data from a research on consumer behavior conducted by N-Dynamic Market Research in 2007. The ratio reflects sales volumes. Upper outer garment accounted for the largest product segment in this industry, at about 29%. This segment includes coats, jackets, blouses and shirts. Under the influence of rising income, this segment will continue to dominate the market.

Underwear accounts for the second largest segment at about 22%. This segment includes socks, stockings, underpants and other kinds of underwear. Among lower clothing, formal and casual trousers account for the largest segment at about 11%. For the working class, formal trousers and skirts for women are required. Also, people aged above 35 years tend to purchase significantly fewer jeans. This is different from the US, where all age groups purchase jeans and short pants rather than trousers.

The largest consumers’ group is the middle-aged people, from 35 to 59 years old. This segment accounted for 37.8% of the industry revenue in 2008, and 39% of the population. This group of consumers generates the largest demand for clothing in the market. In addition, people at this age are more likely to be at the peak of their careers and have more disposable income, making it more possible for them to purchase high end clothing. Formal clothing is also frequently required for social activities within this age group.

The younger age group accounts for 34.2% of the industry revenue. This age group ranges from adolescence to adulthood, which involves several phases requiring different situation based clothing. Although the consumers in this age group do not have the strongest purchasing power, they do not have the same financial burden as the middle-aged group, and often rely on parents for their purchases.

Currently, people in the senior age group spend little on new clothing. However, as society develops and progresses, changes in the culture of senior clothing may occur, which may create a new market for this age group.

Industry Structure and Market Competition

Although China has the biggest apparel industry in the world, the apparel industry in China is still fragmented and underdeveloped in contrast to other industries. It is characterized by a lack of strong domestic brands. An ACMR-IBIS World analysis of industry concentration within the Clothing Retailers Industry in China in 2008 shows that industry concentration was at a low level with the top four firms accounting for an estimated 12.6% of industry revenue for the year. In 2004, this ratio was estimated to be 13.9%.

The market share of the top four players has increased over recent years, and it is expected to continue increasing. The major players of this industry are focusing on branded franchising, which quickly expands sales coverage and market share, as small players are more likely to lose customers or be forced to join franchised chains in order to survive.
In 2007, about 90% of players in the industry had annual revenue lower than 5 million RMB ($600,000), which generated about 30% of industry revenue that year. Several well-known clothing retailers such as H&M and GAP have entered China in recent years, which will threaten the position of some top players in China.

Though the market has had a small decrease in price value, there are signs that consumers are becoming more sensitive to pricing. Low end products do not dominate market share because the mid range clothing is increasing. Market players were unable to lift the price value of the market due to competition and a negative economic environment in 2008. Value in the apparel market will fall in the future as unit prices drop. However, mid-range and high-end products still have potential because the emerging middle class in China has a relatively high disposable income.

The challenges of the future are attributed to a combination of higher labor costs, a shortage of workers, and the global economic crisis that has hit the clothing export market. As a result, many apparel manufacturers have shifted their focus from international markets to the domestic market. Because of the lack of innovation and creativity in design, a price war is inevitable.

Furthermore, traditional retail channels are experiencing a great challenge from online retailers. Online retailing is still in its youth stage of development in China, but it is rapidly expanding with an increasing number of internet users and online consumers. People usuall find the same product with a lower price at an online store than a physical store. Taobao, one of the competitive online retailers in China, exceeded $28.5 billion turnover in 2009. This biggest online transition platform opened Taobao Mall and it has attracted many clothing brands that want to open online stores in Taobao Mall. The turnover growth rates on these online stores are higher than growth rates in off-line stores. Despite the threat of online retailers, there is also a big opportunity for market players to venture into online sales.

### Regional Difference and Market Segmentations

According to Mr Yang, CEO of Mark Fairwhale, there are five tiers for cities according to the level of economic development and living standards. The first tier includes three big cities in China, which are Beijing, Shanghai and Guangzhou. The second tier includes the capital cities of coastal provinces and municipalities, such as Hangzhou and Shenzhen. The third tier includes district cities of coastal provinces and capital cities of inland provinces, such as Ningbo and Changsha. The fourth tier includes country-level cities of coastal provinces and district cities of inland provinces, such as Zhoushan and Jiujiang. The fifth tier, also the last one, includes small cities with more than 200,000 residents. “There are 665 cities with more than 200,000 residents in China. These cities are divided into five tiers according to tier of economic development, population and GDP,” according to Mr. Yang, CEO of Mark Fairwhale. Existing sub-brands including Mark Fairwhale and Mark Fairwhale Jeans target the first three market tiers for entry because the top three market tiers are mature enough to accept fashion styles and afford brand premium prices. The company is also planning to develop another sub-brand aiming at the fourth and fifth tiers cities. These markets are more sensitive to prices. Current brands’ price ranges
may exceed local consumers’ comfort zones or clothing budgets.

Diversity exists among cities in different tiers. Identifying variances in each city plays an important role when it comes to expanding business in different cities in China. “We spend at least half of our working hours on site visiting in different cities every year” said the CEO of Mark Fairwhale. “We can also gather plenty of valuable market information from our franchisees.” If Mark Fairwhale opens new stores in certain cities, regardless of whether the stores are operated by the company or franchisees, the company’s managers will always go to the city and collect first-hand marketing information. As of today, Mark Fairwhale is expanding and building its distribution network into every province in China.

**Marketing and Brand Management**

**Marketing Channels**

Mark Fairwhale has set up a nationwide distribution system in China, including over 900 outlets. These stores help Mark Fairwhale build up brand recognition across the country. In China, brand recognition plays a very important role when consumers are deciding which brand to choose. Furthermore, a sales network throughout the nation helps Mark Fairwhale generate more profits in the second- and third-tier cities than in the first-tier cities, which helps to compensate a relatively low profit rate in the first-tier cities.

In the first-tier cities and some important markets, Mark Fairwhale chooses to open stores directly instead of using franchisees, because these markets have a strong strategic influence on the future development of the brand. Marketing success or failure in cities has a direct influence in the brand development. Big market capacity requires a large amount of human resources and financial inputs in these markets. In the short run, such as five years, the outputs are always less than the inputs. Mark Fairwhale has invested large amounts of money and human capital in these cities, although profit margins are relatively low. The company values long-term brand development more.

Moreover, Mark Fairwhale uses franchising for the second- and third-tier cities. It has 55 franchisees in total across China. Franchisees are familiar with the local market and consumers’ preferences. They also have established networking with local governments and business partners such as department stores. By working with excellent franchisees, Mark Fairwhale is able to build up a widespread sales network nation wide with few capital inputs.

Mark Fairwhale makes a relatively small profit in first-tier cities because of the fierce competition. Internationally well-known fashion brands entered the Chinese market around 2005. They chose first-tier cities and well-developed second-tier cities to enter, because these cities have large market capacities and similar consumer behaviors as other big cities in the world. With large amounts of capital invested in
opening new stores in the center of business districts, intense advertising, and the support from foreign brands’ fans in China, international fashion brands achieved great success in first-tier cities. Compared to these successful international brands, Mark Fairwhale has few advantages. Although most second and third tier cities are less developed than the first tier cities, the huge market capacity and less intense competition in these markets can still bring fairly high profits.

Depending on more than traditional distribution sales, Mark Fairwhale also uses a multi-channel strategy aiming to offer synergies between physical stores and online outlets, which can result in an increased customer foundation, added revenue and higher market share. As of right now, Mark Fairwhale already has an online store running (Appendix 12). According to the China Market Research Group (CMRC), consumers’ trust and the use of online retailing was limited previously to Asia. The online sales in China were equaled to less than 1% of the United States’ in the beginning of the new millennium. However, a more recent CMR research found that 80% of 18 to 32 year-old respondents used the internet to make an online purchase in the past six months, and a vast majority would expect to do so again in the next quarter.

In addition, Euromonitor (2009) expected that internet users in China might exceed 500 million in 2020. It is important to recognize that the previous lack of online shopping among Chinese consumers had to do with a lack of credit card usage, rather than an aversion to online shopping. However, credit card usage in Asia has been booming in recent years, thereby fueling online shopping among Chinese consumers, particularly in the younger generation.

Low-prices are the main attractive sales point for consumers. Mark Fairwhale differentiates products between online stores and stores in shopping centers to even out the price difference. The online store targets consumers aged from 15 to 28 who prefer mix-match. A benefit for the online store is that it sells stocks with relatively low sale expenses.

Furthermore, Mark Fairwhale invests lots of capital and human resources in improving service in the online store, such as shortening the delivery time and improving its refund policy. “Mark Fairwhale E-shop is not just a simple trading platform, but the customer relationship management platform. This piece of e-commerce will continue to develop and it may be the next commercial opportunity for the brand.” Kelvin Yang, CEO Mark Fairwhale.

Brand characteristics

Mark Fairwhale insists on building brand image through creative marketing activities. There are three basic brand propositions: love fashion, love arts, and love

In the “loving fashion” dimension, besides some normal marketing methods such as fashion shows, advertisements on newspapers and magazines, Mark Fairwhale also elaborately picks some fashion companies that convey a similar life style as Mark Fairwhale does. By cooperating with other famous fashion companies, Mark Fairwhale designs special gifts for its VIPs. This is aimed to communicate with consumers not only through products, but also through a coherent spirit behind the products. For example, the target customer of Mark Fair Vogue is between 30-45 years old. Red wine is a symbol of high status and lofty tastes. Mark Fairwhale cooperated with a famous French Chateau last year and specially designed several types of wine for VIPs (appendix 7). Mark Fairwhale Jeans has different target customers compared with Mark Fairwhale Vogue. So the team chooses to cooperate with ZIPPO according to their customer preference. Among young men in China, ZIPPO has a good reputation of fashion and innovation that is consistent with the brand image of Mark Fairwhale Jeans. The team designed a limited edition lighter. Customers can buy this special lighter in Mark Fairwhale Jeans shops (appendix 8).

In the “loving arts” dimension, Mark Fairwhale advocates and promotes creativity. Mark Fairwhale gives road shows in some cities each year, not just advertising the brands but also merging with artistic inspiration. In 2008, Mark Fairwhale combined road shows with a miniature size of Pompidou in Beijing, Shanghai, and Chengdu (appendix 9). Furthermore, Mark Fairwhale organizes “creative motor M-idea forever” to help talented young people begin their first step toward success. Good works will grant people the opportunity to enter into the commercial market so that more talented people are able to achieve their artistic ideals. Last year, Mark Fairwhale sponsored the “Creative Motor Contest” and designed Mark dolls that were displayed in all Mark Fairwhale stores in China (appendix 10). Finally, Mark Fairwhale actively collaborates with artists in various art events in order to advocate enthusiasm to create and advertise the brand image to consumers. In 2010, Mark Fairwhale cooperated with the Shanghai World EXPO 2010 to design Haibao (the mascot of the World EXPO 2010). By committing to all those activities, Mark Fairwhale intends to combine creativity and fashion (appendix 11).

In the “loving philanthropy” dimension, Mark Fairwhale emphasizes the corporate-social responsibility. Mark Fairwhale is committed to helping vulnerable groups in society such as children who live in poverty in the rural and less developed areas. Since 2007, Mark Fairwhale has started “Paper Airplane Child Care Plan” to help children living in poverty get free books for school. When the company heard the news about the 5.12 earthquake in the Sichuan (Szechuan) province, the company leaders held an emergency meeting to make a decision of donating 100,000 RMB and one million RMB worth of clothes to the earthquake area.

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Supply chain management

“Control the product design and distribution network” is the supply chain strategy for Mark Fairwhale.

Through forming a design team and synchronizing with European trends, Mark Fairwhale focuses on creative and innovative product designs. After the design process is completed, Mark Fairwhale finds the appropriate manufacturers and communicates with suppliers. The company will supervise the production process to see if the finished products meet all of the design requirements. However, in order to effectively and efficiently communicate with suppliers and shorten the time from design to sales are big challenges for Mark Fairwhale. The future competition of the fashion industry will focus on “lead time” (the time from design to sales). Compared with the estimated 14[1] days “lead time” for ZARA, Mark Fairwhale is actively seeking solutions to shorten its lead time.

Human Resource Management

Organization staffing

The goal of the human resource department is to select applicants with proper talents for the development of the company and transfer “Para-elite” to elite. In Mark Fairwhale, “the standard of identifying a talented person by one’s educational background, one’s position, one’s experiences, one’s gender, or by one’s age” violates company values. “As long as you can create value for the company, you are the talented,” said Huanshuang Feng, HR Director in Mark Fairwhale5. “Creating excellence, Leading the trend, Caring about the customers, Sharing achievements” are the core values for Mark Fairwhale. High recognition of company culture is an important recruiting requirement. “http://video.sina.com.cn/v/b/54329504-1589190960.htmllerion.”

After recruiting the applicants with proper talents for the company, retaining good employees is also a problem that the HR managers in Mark Fairwhale are facing. Mark Fairwhale uses spiritual and material approaches. Regarding payment, Mark Fairwhale has no advantages. However, Mark Fairwhale Corp. gives employees more opportunities to explore potential ability and self-improvement. Through job enlargement and job rotation, employees have better opportunities to develop more well-rounded skills. Furthermore, one of the core values in the company is sharing achievements. At the end of each year, Mark Fairwhale Corp. recognizes outstanding employees and teams based on their achievements and holds celebration events.

In addition, a variety of benefits such as transportation subsidy, meal subsidy,

5 http://www.tophr.net/InterView/html/20091027143556.htm
travel, medical insurance, and training funds are offered to employees. For example, every department in the company sets up a fund to organize trips to reward teams that have been hardworking, to celebrate birthdays for each employee in the team, or to subsidize employees visiting their family members. Although they do not pay well, these special funds have shown the company’s genuine concern toward employees and their families. With extra benefits, employees treat Mark Fairwhale as their own company and will be more responsible to the job.

Spiritual and monetary rewards lower the turnover rate. “Medium-high salary, a variety of benefits and long-term career development paths attract talents joining the Mark Fairwhale team and the turnover rate is lower than average in the industry.” So far, no one has left the core management team in the company.

Training and development in Mark Fairwhale

One important part of the Mark Fairwhale company culture comes from entrepreneurship. The president of Mark Fairwhale, Kevin Yang, started his own business when he was 25. He is a creative guy with passion. Mark Fairwhale has a young, open, dynamic, and innovative team. On the other hand, Mark Fairwhale always has a sense of preparing for the unknown or unexpected crises, which has prepared the company well from being eliminated the next day. Mark Fairwhale pays great attention to seize every opportunity to develop and expand.

Mark Fairwhale has put a great effort into training its employees, from sales associates to managers. For sales associates, Mark Fairwhale opened up an online business school in 2009. Today, the online business school focuses on training sales associates about the standardized service process, such as how to correctly answer the questions that customers frequently ask. Each store is equipped with computers, internet, and a unique account number. All sales associates can log into the business school network site by using this account to read the training slides, books, and even take quizzes. The Human Resources department also invites famous instructors in retail management to give training to sales associates, from sale skills and customer psychology to high quality customer service.

Mark Fairwhale encourages managers to take training courses. According to seniority, corporate and employees share the training cost. For example, for employees with more than five years working experience in Mark Fairwhale, the company pays 60% of training cost and employees pay for the rest (40%). The company will only compensate the employee with the maximum amount of 60,000 RMB per year, and the compensation will be paid to the employee in several years. At the same time, Mark Fairwhale pays attention to setting a good

6 [http://www.tophr.net/InterView/html/20091027143556.htm](http://www.tophr.net/InterView/html/20091027143556.htm)
learning environment and encourages knowledge sharing among colleagues. Every time an employee comes back from outside training, he or she is required to write a summary report about the result of the training and give a presentation to coworkers.
Questions

1. After ten years of rapid development, Mark Fairwhale has accumulated experience and capital. On the company website, they are looking for appropriate foreign brands and want to be the sole agent in China. What do you think about this development strategy? What are the advantages and disadvantages?

2. Besides franchising for foreign brands, what do you recommend for Mark Fairwhale’s diversification in the future in China?

3. Compare Mark Fairwhale with a similar international brand that you are familiar with. What are the similarities and differences between them?
   
   What are the advantages and disadvantages of Mark Fairwhale doing business in China?

4. What do you think about Mark Fairwhale’s entry strategies into different tiers of cities (wholly owned in the first-tier cities and franchising in the second- and third-tier cities)? What do you think about Mark Fairwhale’s strategy of concentrating future development on second-tier and third-tier cities?

5. What are the opportunities and threats in the Chinese apparel industry? Have Mark Fairwhale taken opportunities and how has Mark Fairwhale faced threats?

6. Suppose you were the CEO of American Eagle Outfitters, Inc. You were thinking about expanding the business into China. How would this case help you to make decisions on targeting segments, marketing channels, building brand image, building up excellent teams, and training employees?

7. Online retailing will rapidly develop in the next five years. What do you think about Mark Fairwhale’s online marketing strategies? Mark Fairwhale is cooperating with Taobao, which is the biggest online trading platform in China. Mark Fairwhale opened up a store in Taobao Mall. Preventing fighting among different channels is a big issue for the company. What are your recommendations?

8. High employee turnover rate is a common problem in all retailing companies. How could Mark Fairwhale continue their ability of retaining key employees? Do you have some other methods to reduce employee turnover rate?

9. What do you think about the international expansion of Mark Fairwhale? What do you think about Mark Fairwhale choosing Singapore as its first stop to expand internationally?
### Appendix 1 Three Sub-Brands of Mark Fairwhale

<table>
<thead>
<tr>
<th>Origin</th>
<th>Brand Image</th>
<th>Target customer</th>
<th>Price Range</th>
<th>#Store</th>
<th>Picture</th>
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<tbody>
<tr>
<td><strong>Mark Fairwhale Vogue for Men</strong></td>
<td>2000 European fashion style for mature men</td>
<td>30-45</td>
<td>RMB600-RMB5000</td>
<td>150</td>
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<td><strong>Mark Fairwhale Jeans for Men</strong></td>
<td>2002 Italian fashion style for young men</td>
<td>20-30</td>
<td>RMB200-RMB3000</td>
<td>500</td>
<td>Appendix 2</td>
</tr>
<tr>
<td><strong>Mark Fairwhale Creative Urban Wear</strong></td>
<td>2004 Integrated British royal style and retro rock elements to create fashion style for urban women</td>
<td>28-38</td>
<td>RMB300-RMB1000</td>
<td>70</td>
<td>Appendix 3</td>
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Appendix 2 Mark Fairwhale International Vogue Men’s Wear
Appendix 3 Fairwhale JEANS for Men
Appendix 4 Fairwhale Creative Urban Wear
Appendix 5 Dressing changes in past 30 years in China

1970’s typical dressing in China

2010’s typical dressing in China
Appendix 6 Market share for different apparel products and demographic groups

PRODUCTS AND SERVICE SEGMENTATION

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<thead>
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<th>Product/Services</th>
<th>Share</th>
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<td>Underwear</td>
<td>22.0%</td>
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<tr>
<td>Formal and Casual Trouers</td>
<td>15.0%</td>
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<tr>
<td>Sneakers</td>
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</tr>
<tr>
<td>Hats</td>
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<tr>
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<tr>
<td>Sportswear</td>
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<tr>
<td>Short pants</td>
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<tr>
<td>Other</td>
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MAJOR MARKET SEGMENTS

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<th>Market Segment</th>
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<tr>
<td>Middle Age Female (35-59)</td>
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<tr>
<td>Children (0-14)</td>
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</tr>
<tr>
<td>Young Female (15-34)</td>
<td>17.9%</td>
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<tr>
<td>Young Male (15-34)</td>
<td>16.3%</td>
</tr>
<tr>
<td>Senior Age (above 60)</td>
<td>9.4%</td>
</tr>
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Appendix 7
Appendix 8
创意马达

2009年度，马克华菲联合中国专业艺术媒体推出第一届“M-idea Forever创意马达”艺术大赛。希望通过艺术的影响力，让马达的创意活力进一步释放，同时通过创意马达，让更多年轻设计师崭露头角。为了鼓励更多的年轻设计师参与，我们特设立一个奖金池，展现他们的才华。

第二届M-idea Forever 艺术设计大赛

即将启动

2010年4月-10月

报名创意马达，不要错过机会！

http://www.mfidea.com
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