



Fashion Online

In June-July 2013, Esper Group, a consulting company in the fashion industry, conducted an online survey about online purchases in the fashion sector made by Russian consumers. The survey polled 2,196 people (including, 1161 men and 1,035 women), thus representing an active adult Russian Internet audience (active being defined as being online at least once a week). The results offer important insights for e-commerce's progress in Russia as a whole.

For example, the study did not show a direct relationship between socio-demographic characteristics, income, and online shopping. The bulk of online customers make irregular or infrequent purchases, and the model "fast fashion" is not detected in most cases. High loyalty means that consumers mainly buy in the same stores, the majority of which are outlets or online mail catalog sites.

Information from Data Insight provides more information on the average online clothing shopper. 68% are women, 85% are below 45 years old, and 46% are younger than 30 years old. 38% live in the capital regions, while 40% live in small cities or rural areas. 48% have family income of 30-75 thousand rubles per month (~\$24-42 thousand per year), and 21% have even higher income. 67% have been online for 3-10 years. Even though, 21% have even longer online experience, only 38% made first online purchase more than 3 years ago.

How often do Russians make online clothing purchases?

45% of respondents buy clothes and shoes several times a year, 27% several times per season, and 18% at least once a month, but many questioned have made online purchases only several times in their lifetime (19%) or several times per year (17%). In the same sample, loyal customers, those who buy clothes online at least several times a season,

make up only 14% of respondents. The active core target audience for online clothing stores can thus be estimated at 8-9 million users.

Average purchase size

The average online purchase of clothes, shoes, or accessories amounts to between 1,000 and 3,000 rubles. This price covers 45% of online shoppers clothing purchases. 27% of respondents spend between 3000 and 5000 rubles, while about 1% of shoppers spend more than 10,000 rubles. At the same time, the maximum spending level for online clothing shoppers appears to be a bit bigger.

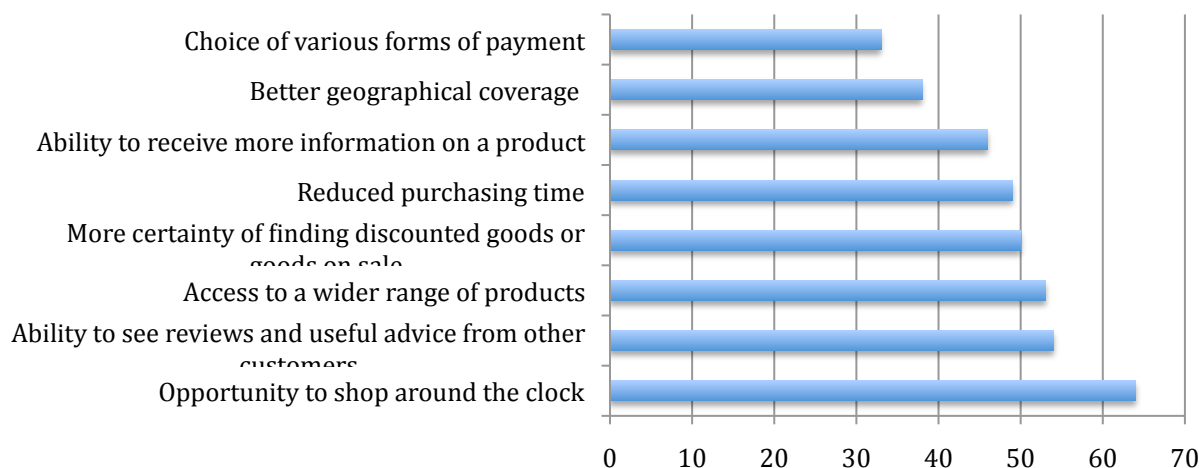
Online versus offline shopping

About 57% of the respondents with experience buying clothes online consider buying over the Internet more profitable than making similar purchases offline. Only 17% have the opposite point of view. Only 29% of those who had bought clothes online return the purchased items to the online store.

What are the main advantages of shopping online for clothing?

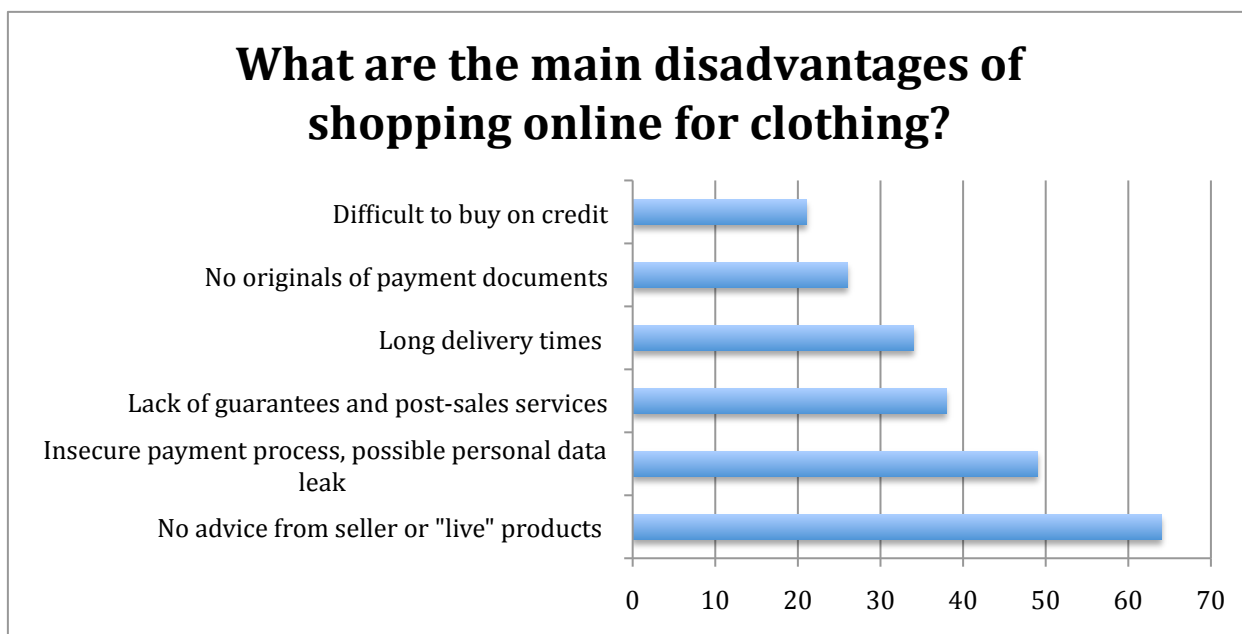
The advantages of online shopping for Russian Internet users include the opportunity to shop around the clock (64%), to see reviews and useful advice from other customers (54%), to have access to a more a diverse range of products (53%), to have more certainty of finding goods at a discount or on sale (50%), to reduce purchase time (49%), to be able to obtain more information about the product (46%), to have better geographical coverage (38%) and to have the choice of various forms of payment (33%).

What are the main advantages of shopping online for clothing?



What are the main disadvantages of shopping online for clothing?

Russian Internet users find the main disadvantages of online shopping to be the impossibility of obtaining advice from a seller and of viewing products in person before making a purchase (64%), the insecurity of the payment process and the possibility of a leakage of personal data (49%), the lack of guarantees for the goods and post-sales services (38%), long delivery times (34%), the inability to obtain the originals of payment documents (26%), the difficulty of buying goods on credit (21%).



What problems arise when shopping online for clothing?

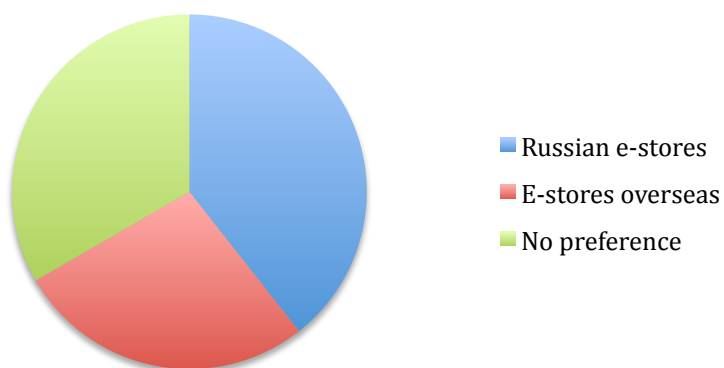
Among the major problems that occurred when shopping for clothes online, respondents indicated problems with the selection of (58%) and availability of (32%) the desired size, along with the difficulty of understanding what products looks like in person (48%) and the online store's interface (12%). For only 15% of shoppers, no difficulties arise.



Cross border sales

Currently 39% of Russian Internet users who purchase clothes online prefer Russian online stores and 27% prefer stores overseas. But if these stores have equal confidence of their online customers, (40%) use Russian because they find them to be cheaper (40% vs. 17%), have faster shipping (41% vs. 12%), and a more user-friendly size range of clothing and footwear (34% vs. 16%). On the contrary, factors in favor of foreign online retailers include a wider range of products (70% vs. 22%), better quality (65% vs. 10%), and lower costs of products themselves (57% vs. 37%).

Preference for online shopping for clothing



Why choose Russian e-stores and overseas e-stores?

