

Yandex



Online Fashion: Retailers Category Overview

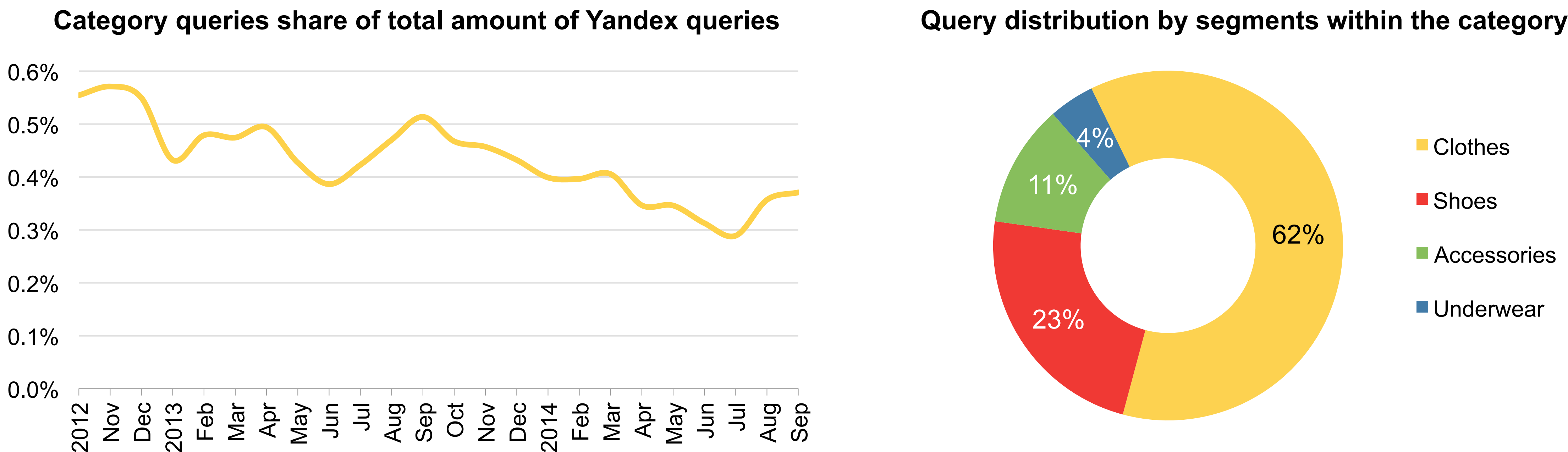
Q4 2014

User Interest in Category

- Query dynamics
- User interest growth in category
- User interest growth forecast
- User interest on online shopping in regions
- User interest in Moscow, Saint-Petersburg vs. regions
- User interest in Russia vs. CIS

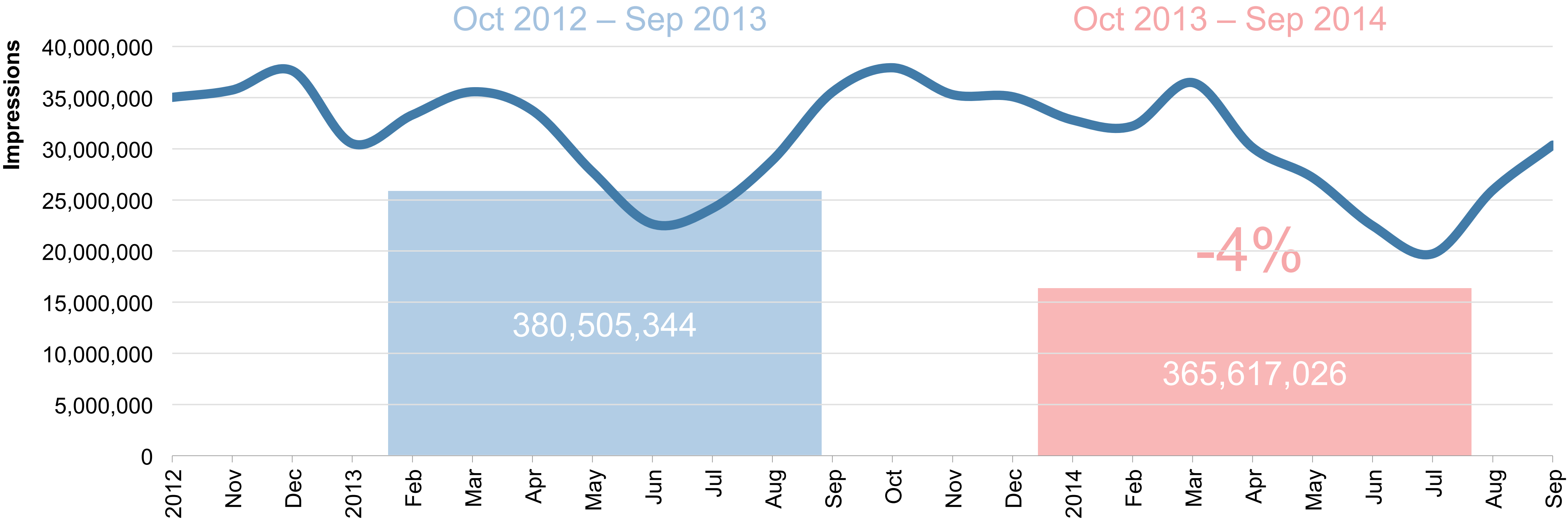
User Interest in Category

Queries related to the scope of clothing and shoe shopping make about 0.5% of the total Yandex queries.



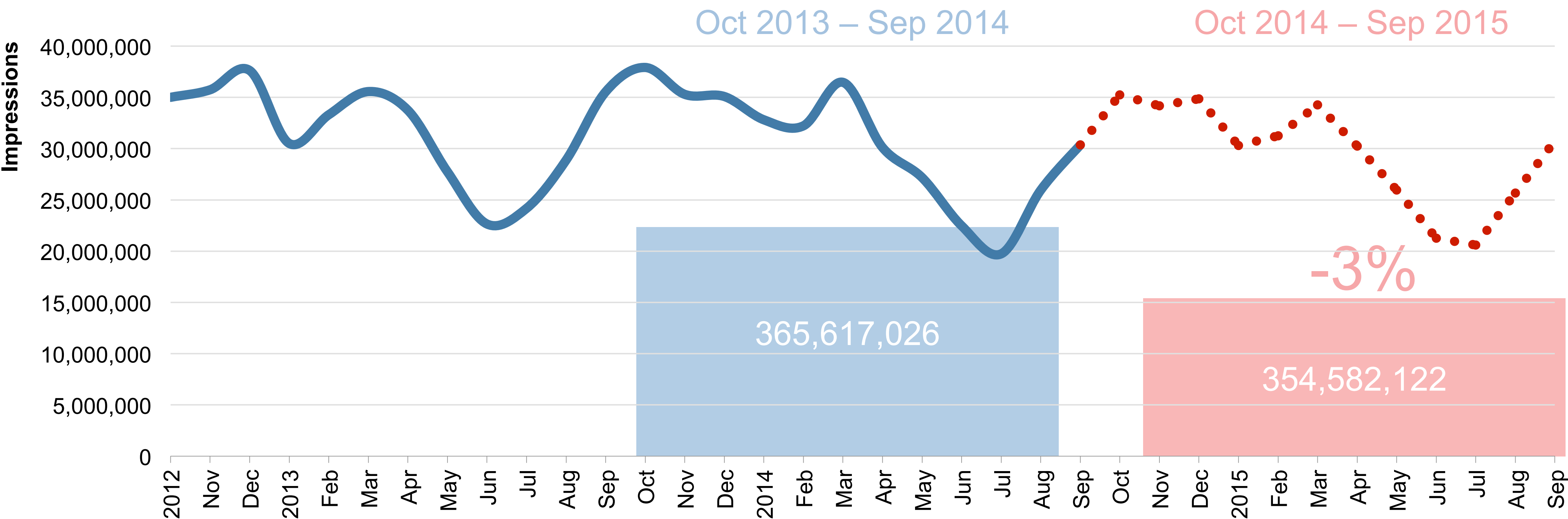
Queries on clothes are the most popular in the category. They made up more than 60% of all category queries for the last 12 months.

Category Dynamics



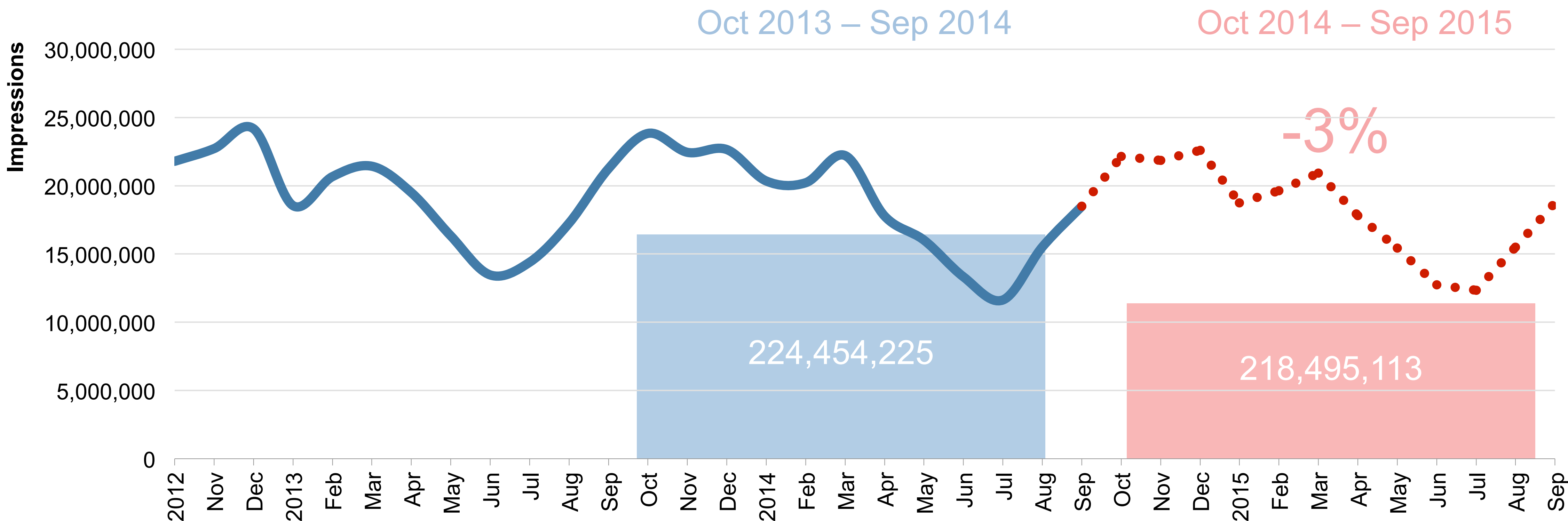
In the last 12 months, user interest in clothing and shoe shopping went down by 4%

Category Dynamics Forecast



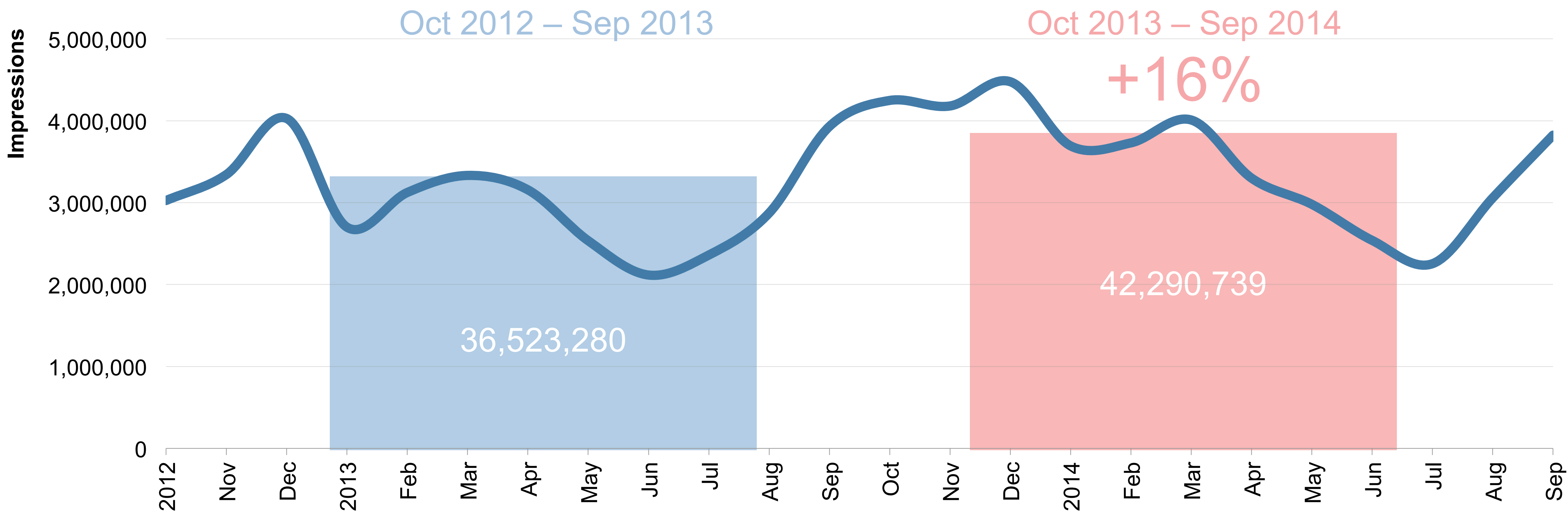
Interest in the entire category (clothing, shoes, accessories) is expected to fall by 3% in 2014-2015.

Category Dynamics Forecast (Clothing)



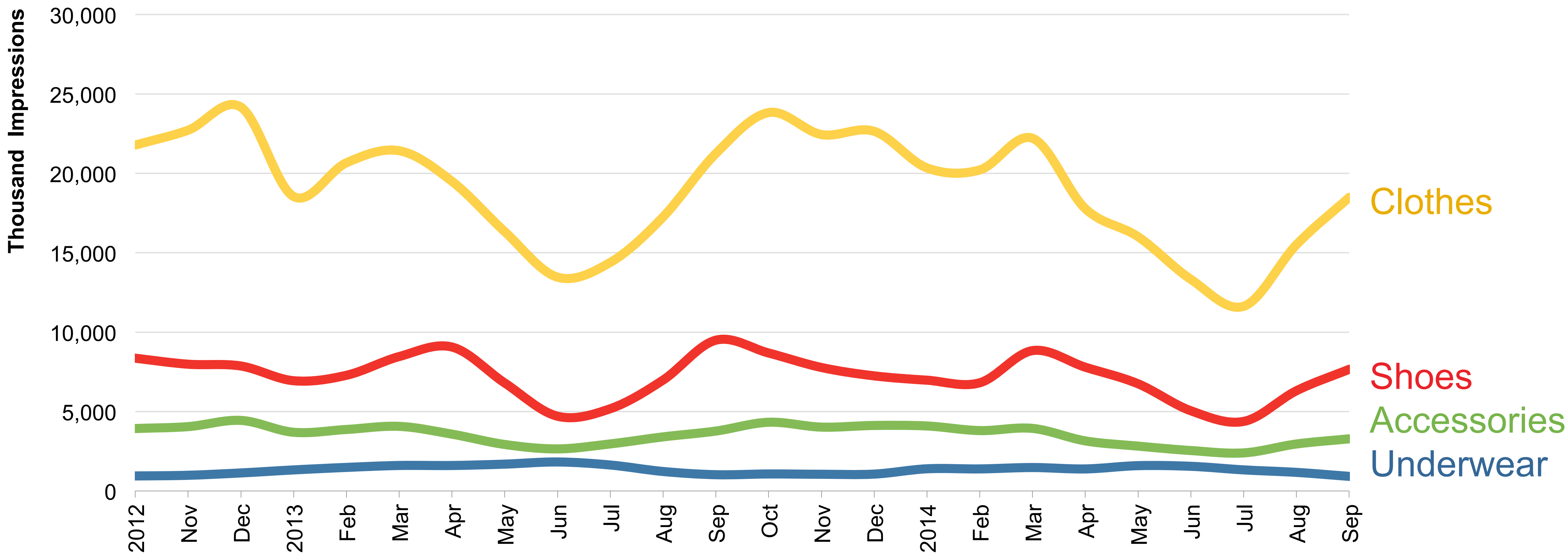
Queries on clothing made up more than 60% of all category queries. That is the main reason there are similar user interest trends in the clothing category and the whole category “Clothing, shoes, accessories”. From October 2014–September 2015 growth rate is expected to be -3%.

User Interest Growth in Online Shopping



Growth of queries with intent to shop online exceeds user interest growth rate in the overall category:
+16% vs. -3% (in total).

Query Dynamics within Category

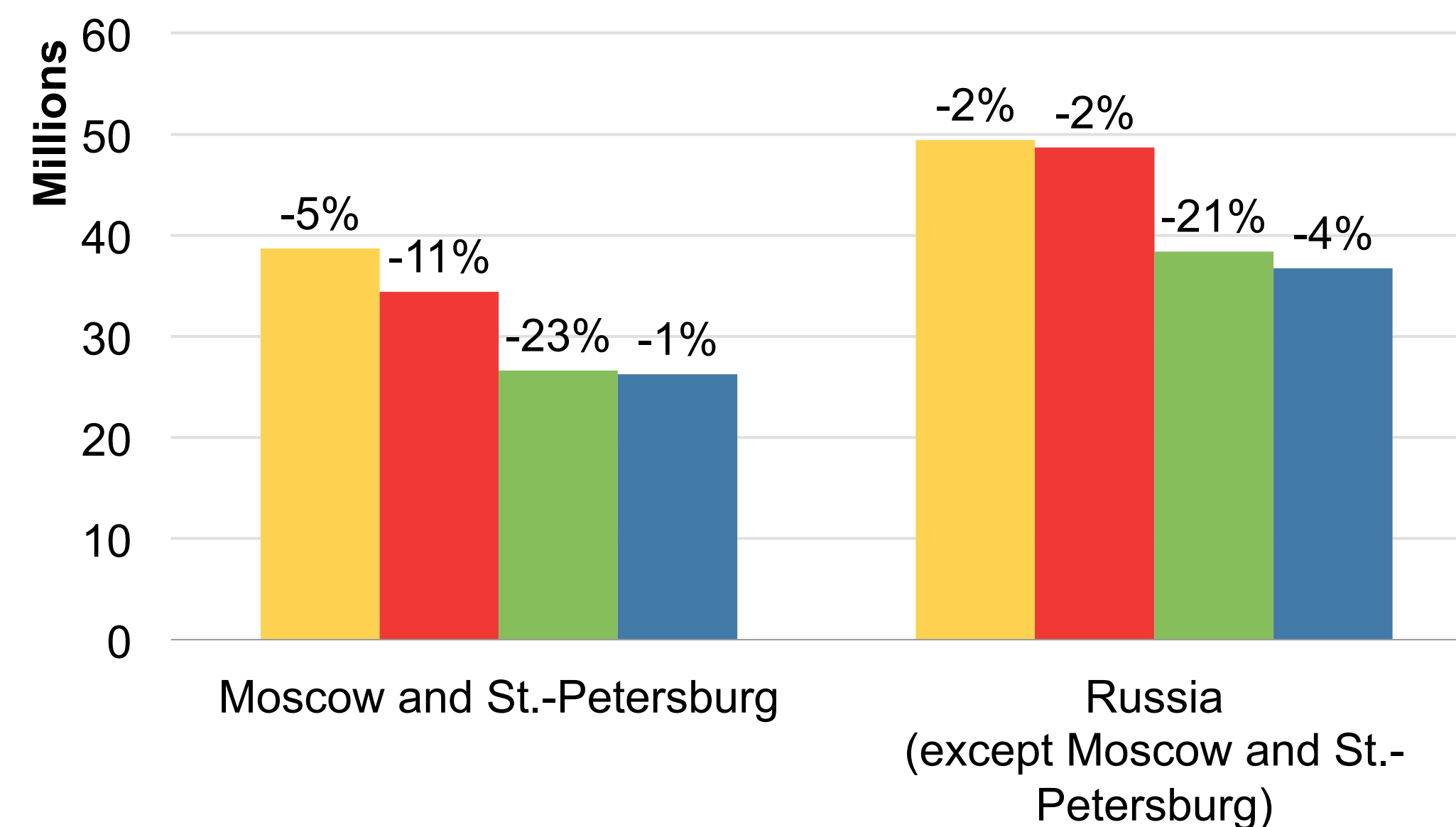
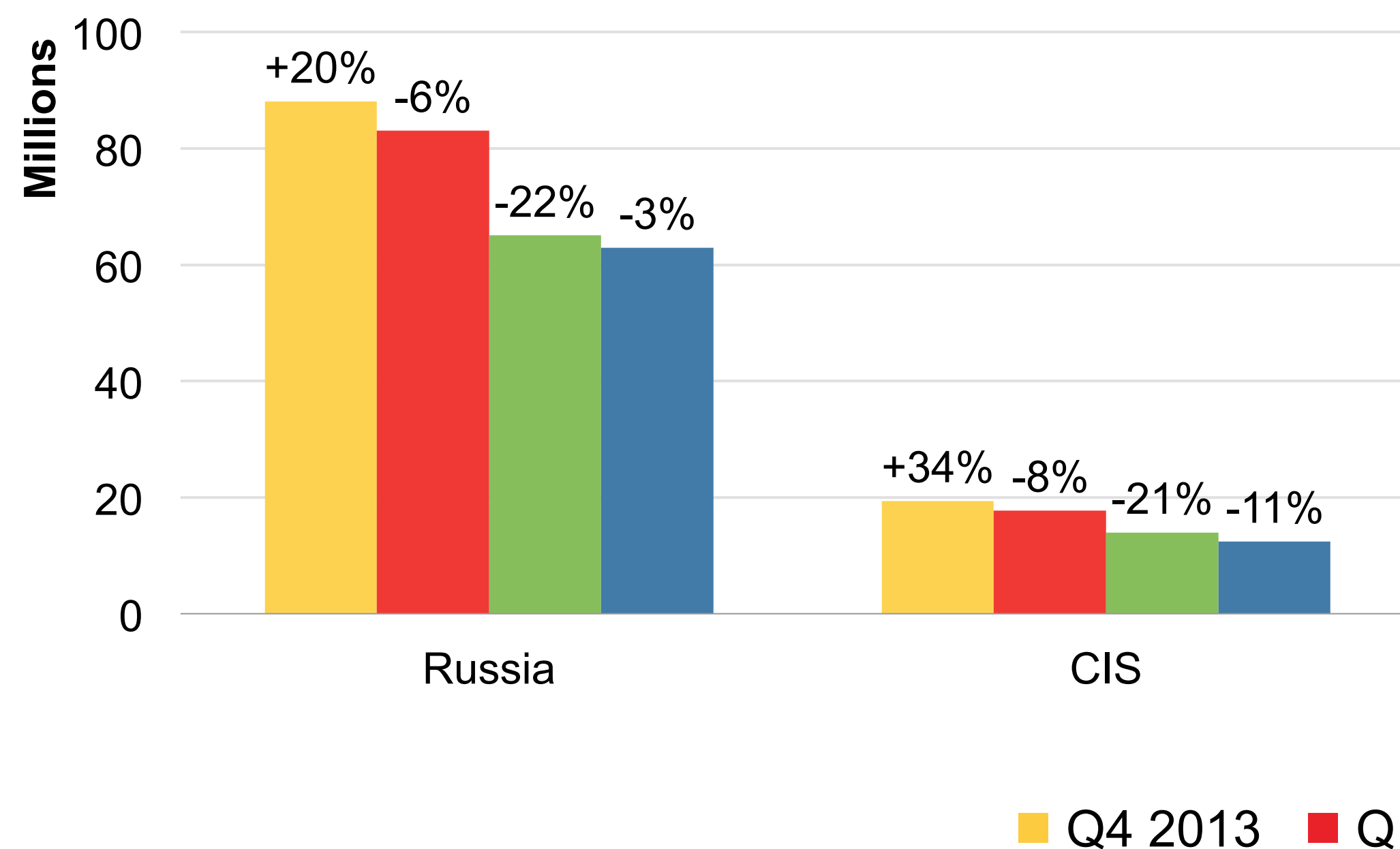


User interest in the Clothes and Shoes categories experience more significant seasonal changes than Accessories or Underwear.

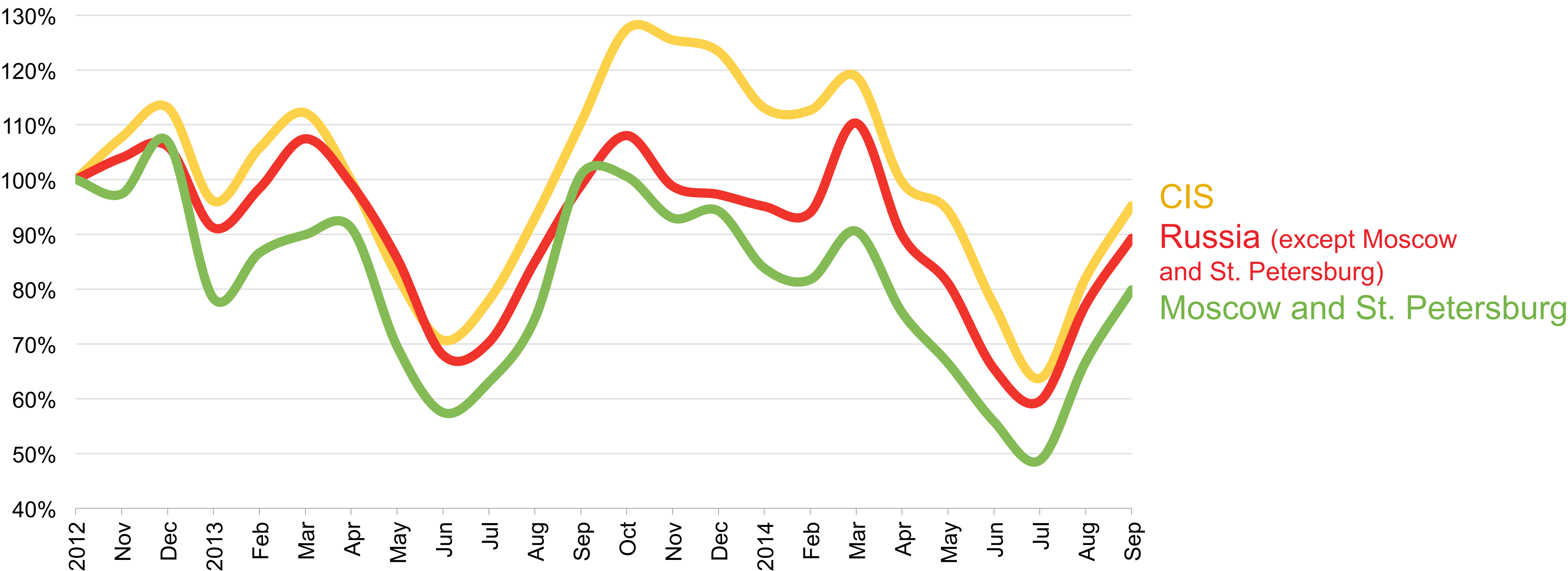
User Interest Growth Dynamics

There was a significant decline of user interest in the category during the 2nd quarter of 2014.
The decline of category in Q2 2013 in Russia is -15% vs. -22% in Q2 2014.
CIS: -19% (Q2 2013) vs -21% (Q2 2014).

**The growth rate of the amount of queries in category
(Impressions by quarters)**

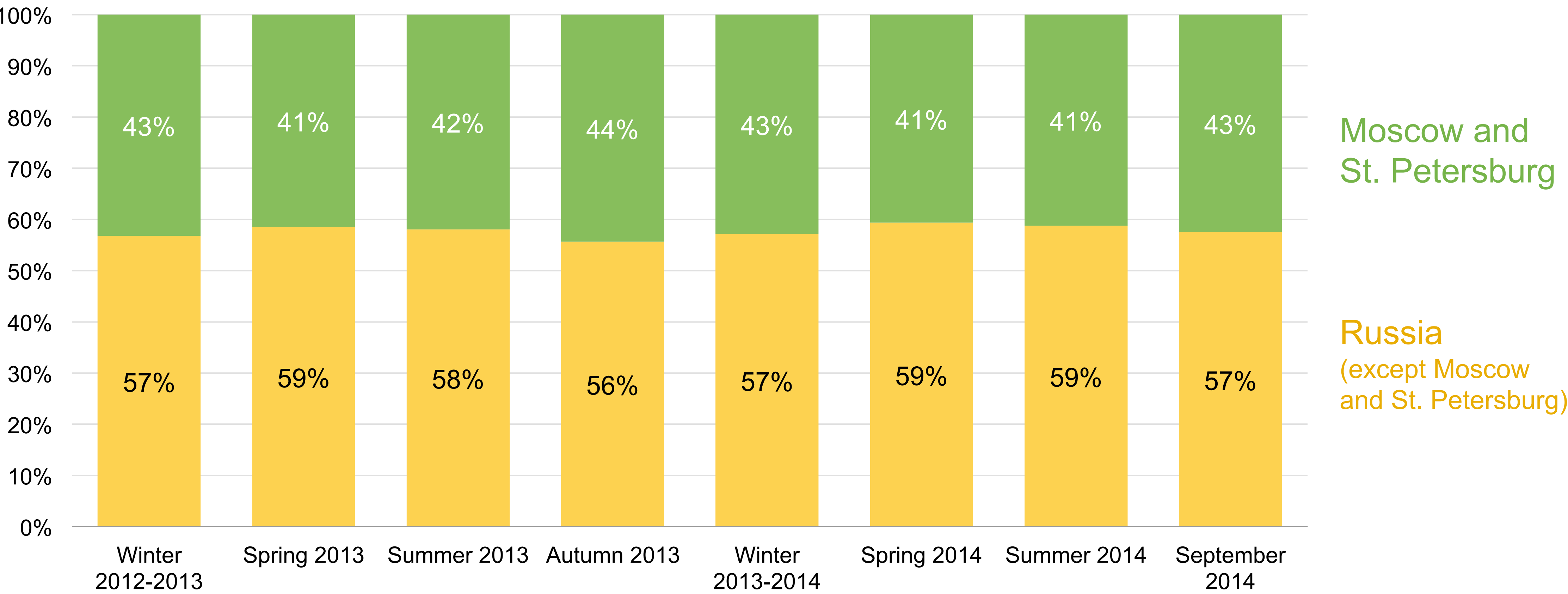


Interest towards Category in Regions: CIS, Russia



The fastest growth of user interest in clothes and shoes is in CIS region. The category growth is quite steady throughout Russia but especially rapid in the regions.

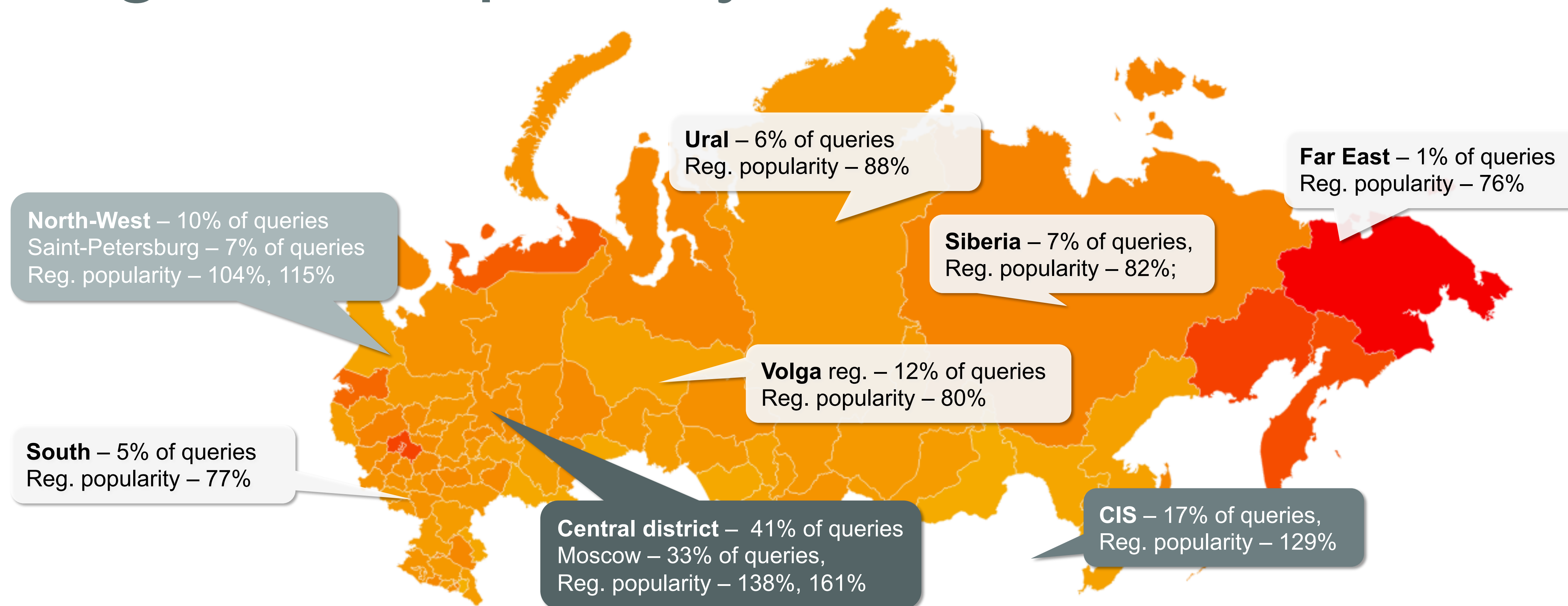
Interest towards Category in Russian Regions



Share of queries from users in the regions with the highest internet penetration (Moscow and Moscow region, St. Petersburg and the Leningrad region) is gradually reducing. The audience is steadily being reallocated in favor to the regions.

Wordstat.yandex.ru statistics, Oct 2012 – Sep 2014

Regional Popularity



There is a fairly large margin of interest growth in Russian regions. The majority of traffic on clothing and shoe shopping comes from the Central region. The popularity rate is 161% in Moscow, whereas in most other Russian regions it is 80–100%.

Online Fashion Retailers Brand Dynamics

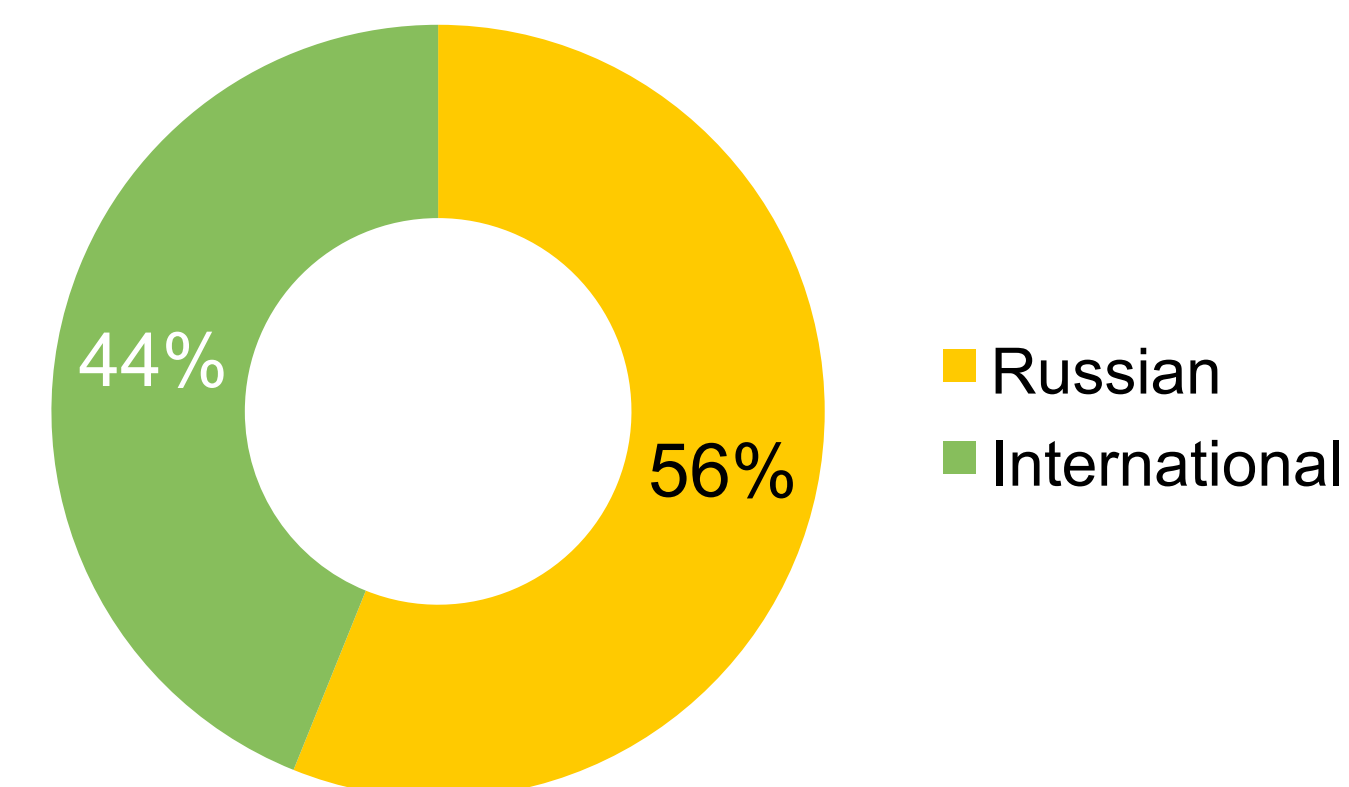
- User interest in Russian online fashion retailers
- User interest in International online fashion retailers

Online Fashion Retailers Dynamics

User interest Dynamics
(based on retailers brands statistics)

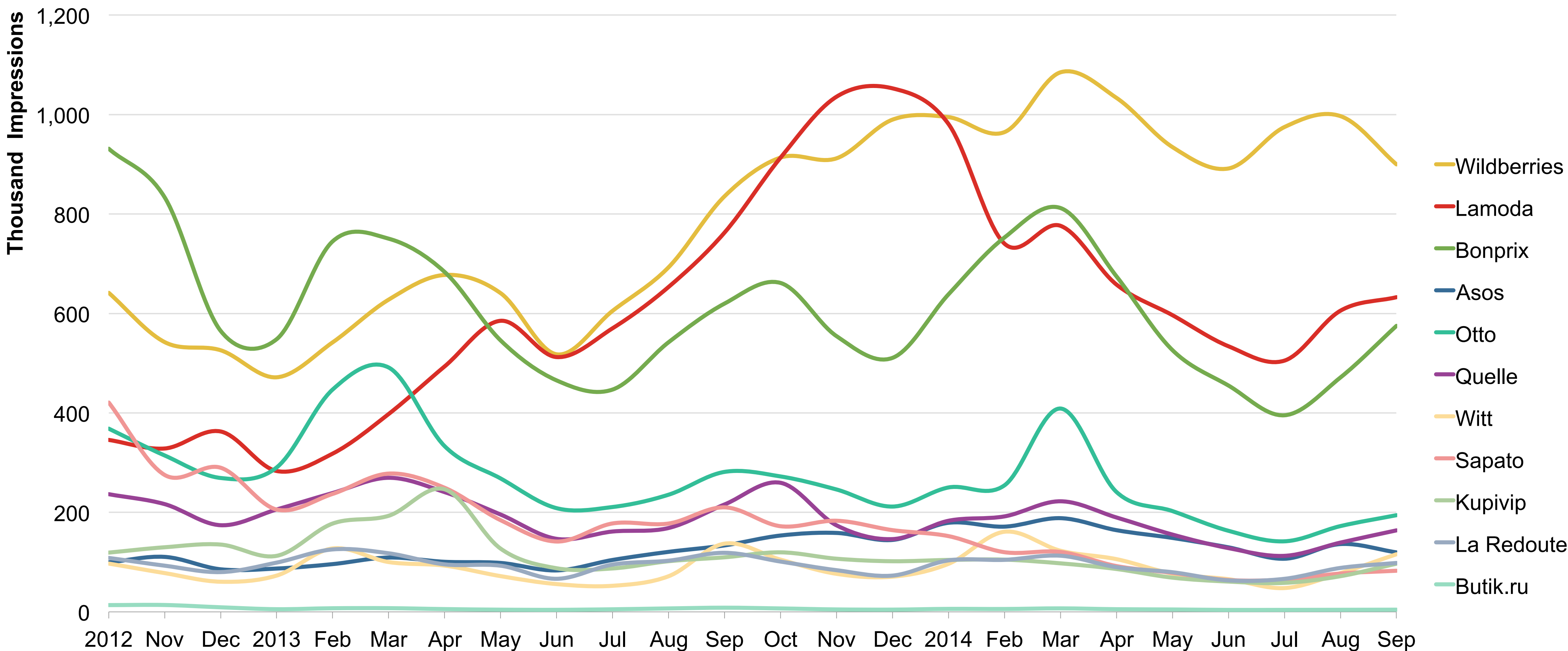


Online retailers share, September 2014



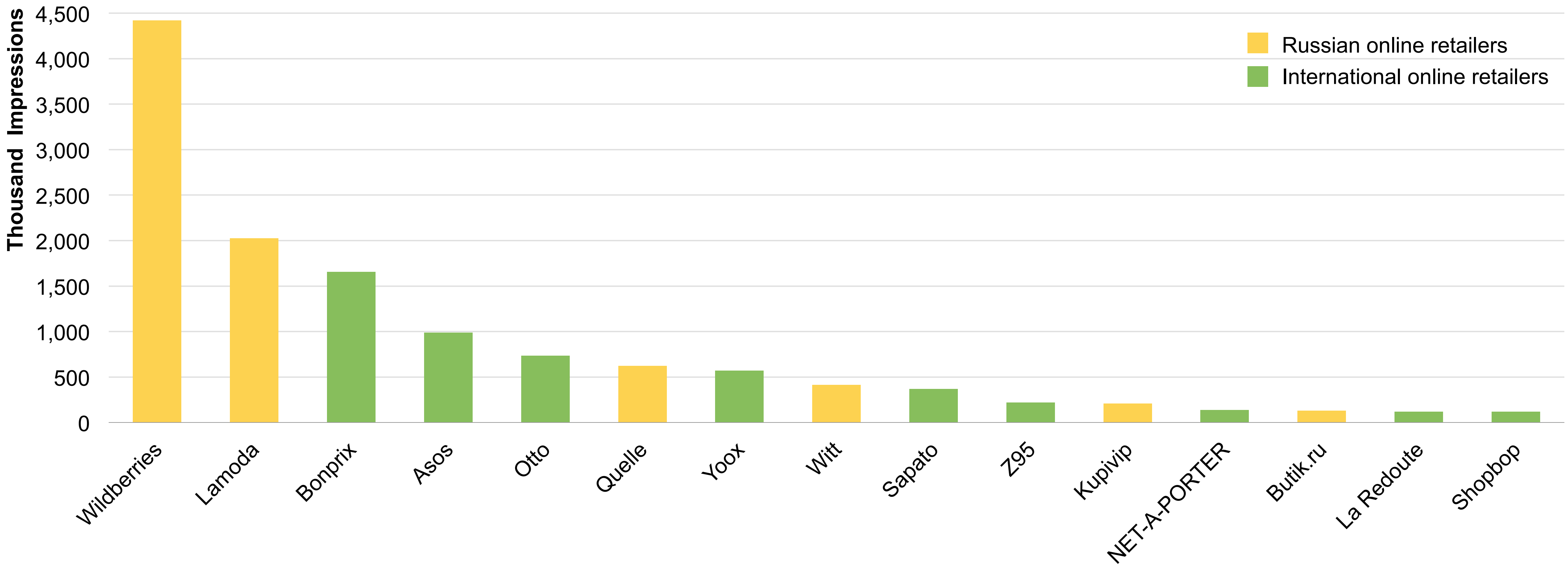
For the last 12 months, interest in local online retailers has increased by more than 1,2 times. As a result, in September, their share has exceeded the share of interest in international retail sites. The shift was caused by changes in popularity among brand leaders: user interest growth to Wildberries, Lamoda and an interest drop to Bonprix.

Online Fashion Retailers Brand Dynamics



Online Fashion Retailers Popularity

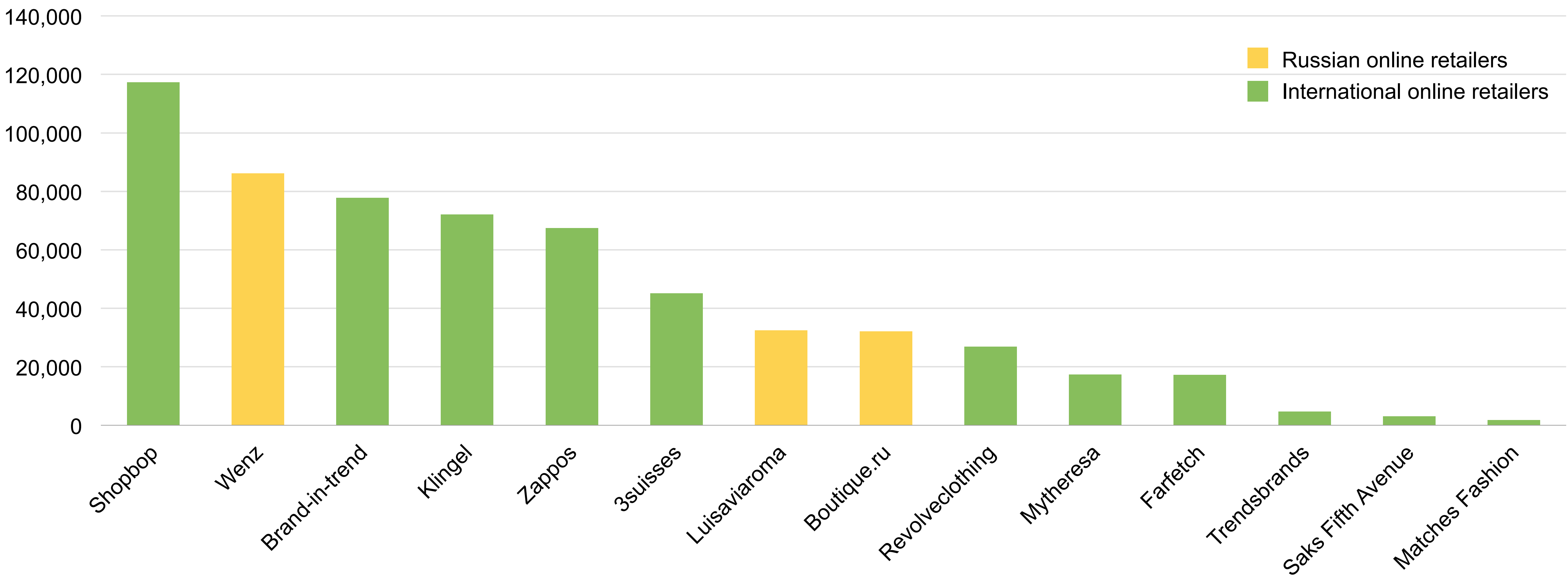
(Top-15 brands)



(based on data for the last 12 months)

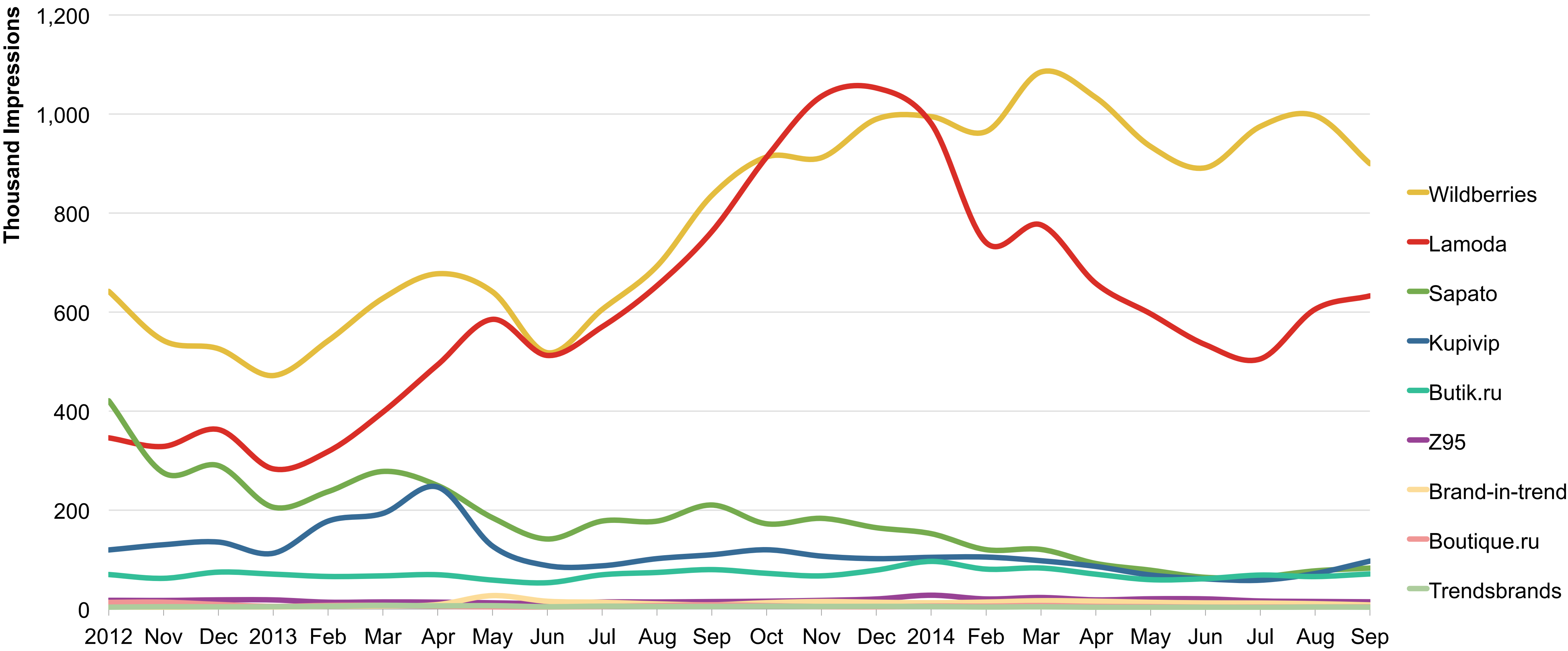
Online Fashion Retailers Popularity

(Positions 15–28)

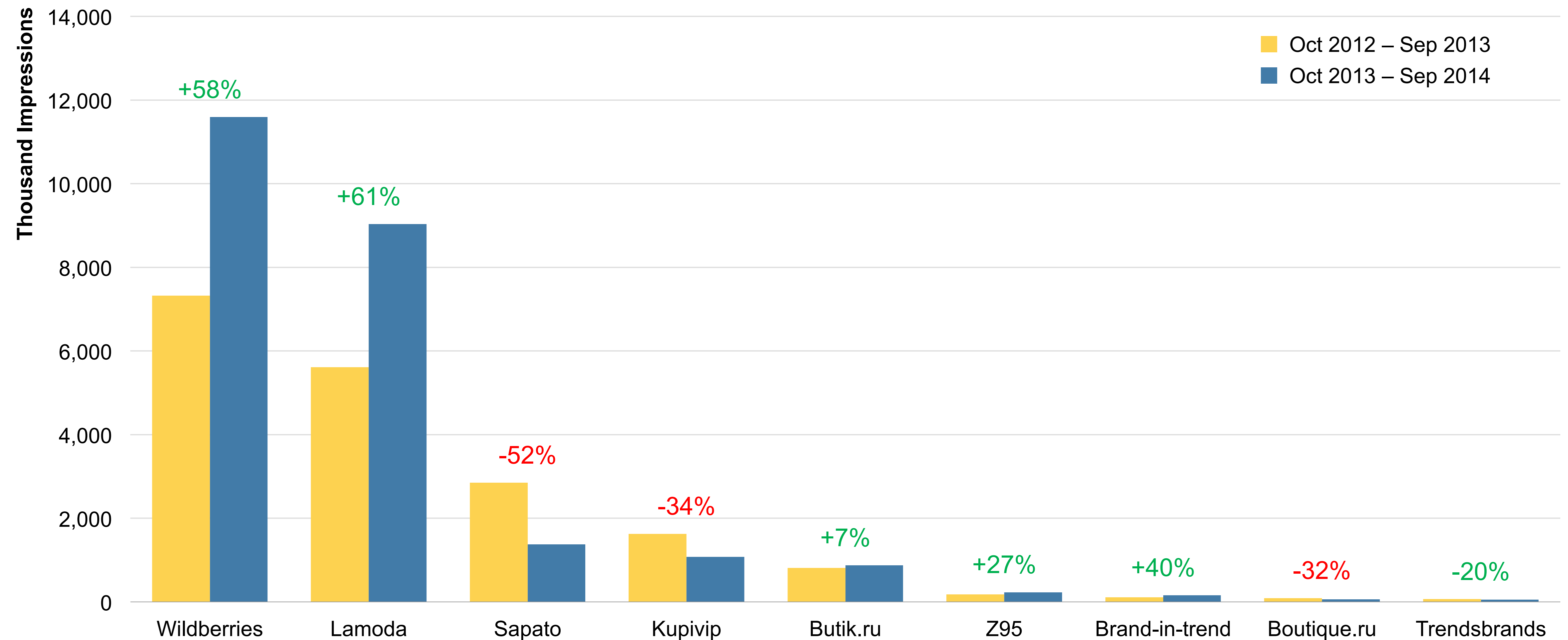


(based on data for the last 12 months)

Brand Dynamics of Russian Online Retailers

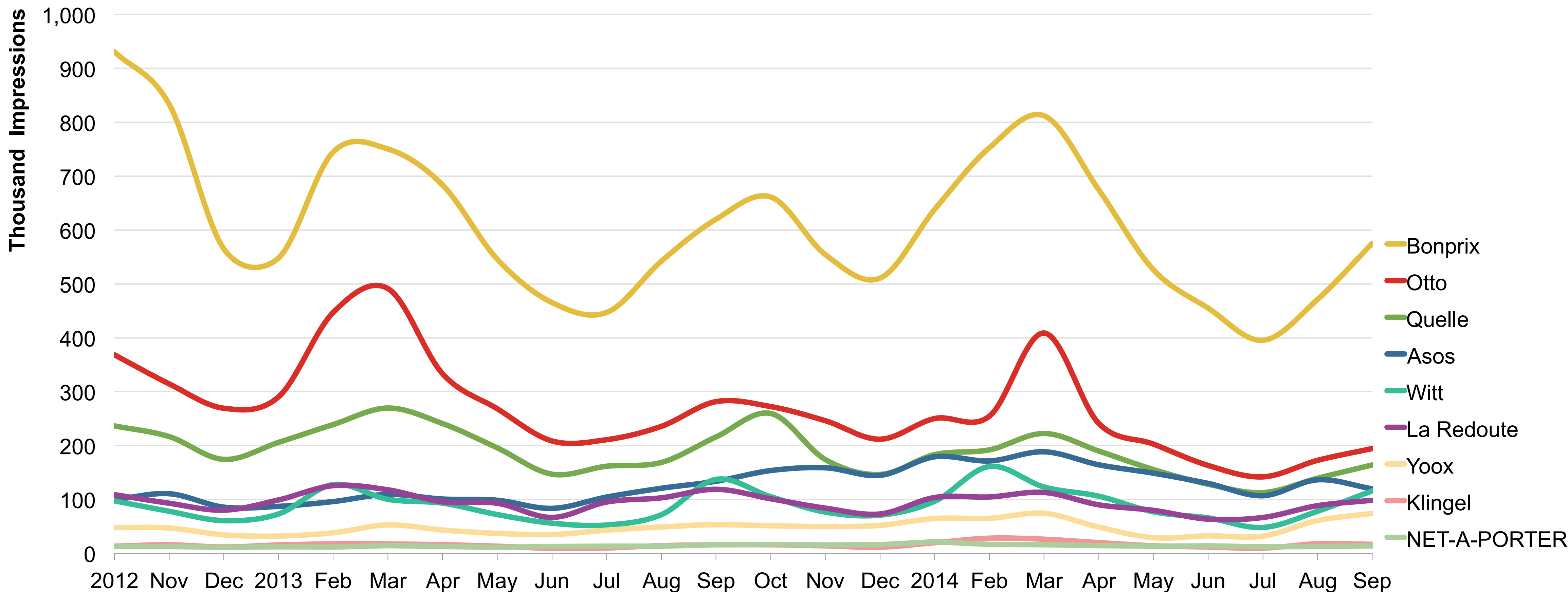


Variation in User Interest in Russian Online Retailers



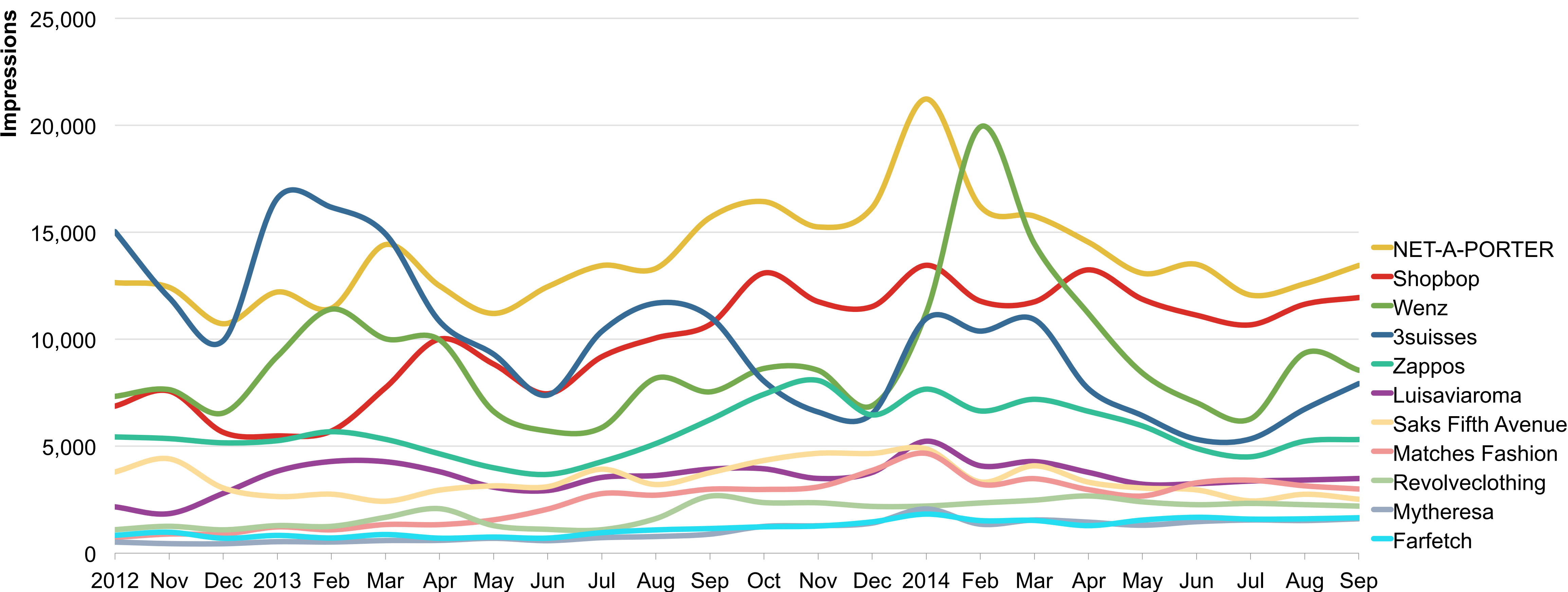
Brand Dynamics of International Online Retailers

(Top-9 brands)

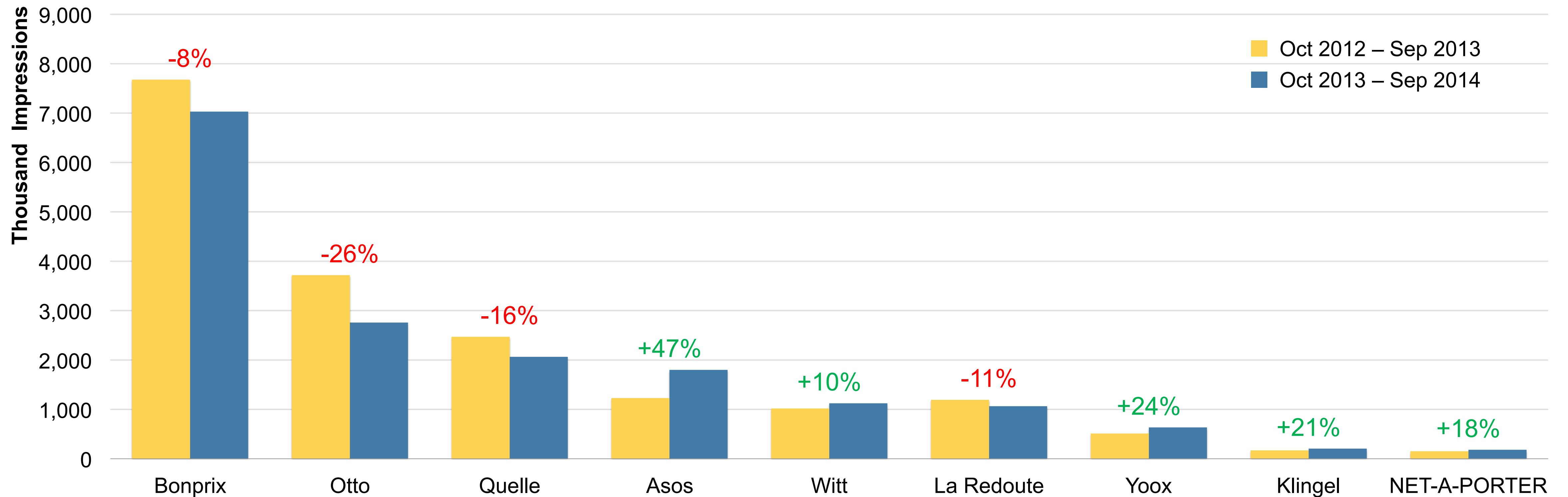


Brand Dynamics of International Online Retailers

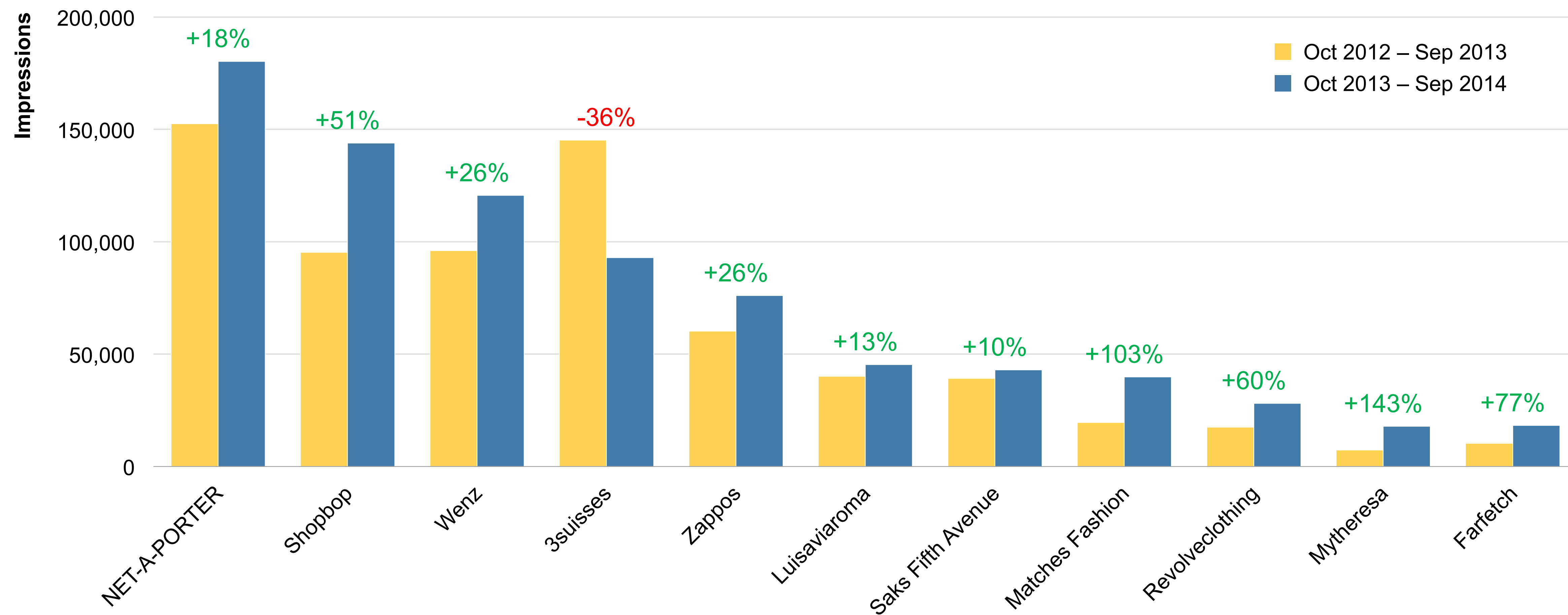
(Positions 9-19)



Variation in User Interest in International Online Retailers (Top-9 brands)



Variation in User Interest in International Online Retailers (Positions 9-19)



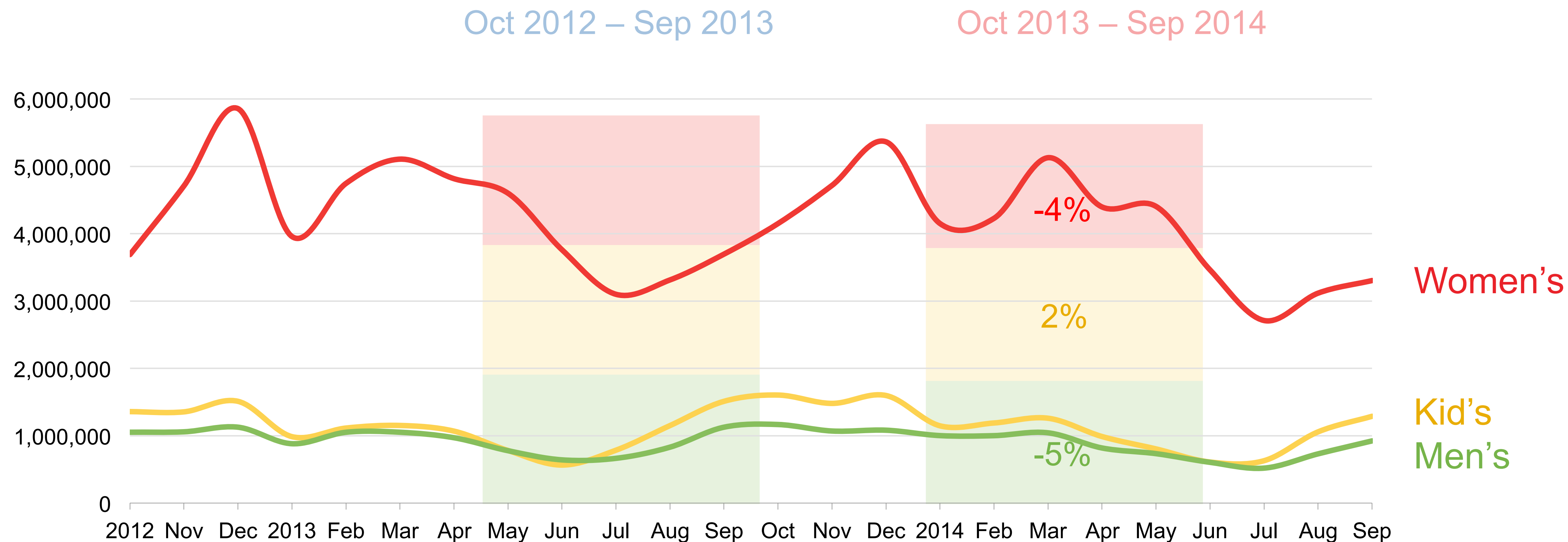
Assortment Analytics (by segments)

- Clothing
- Accessories
- Underwear

Clothing

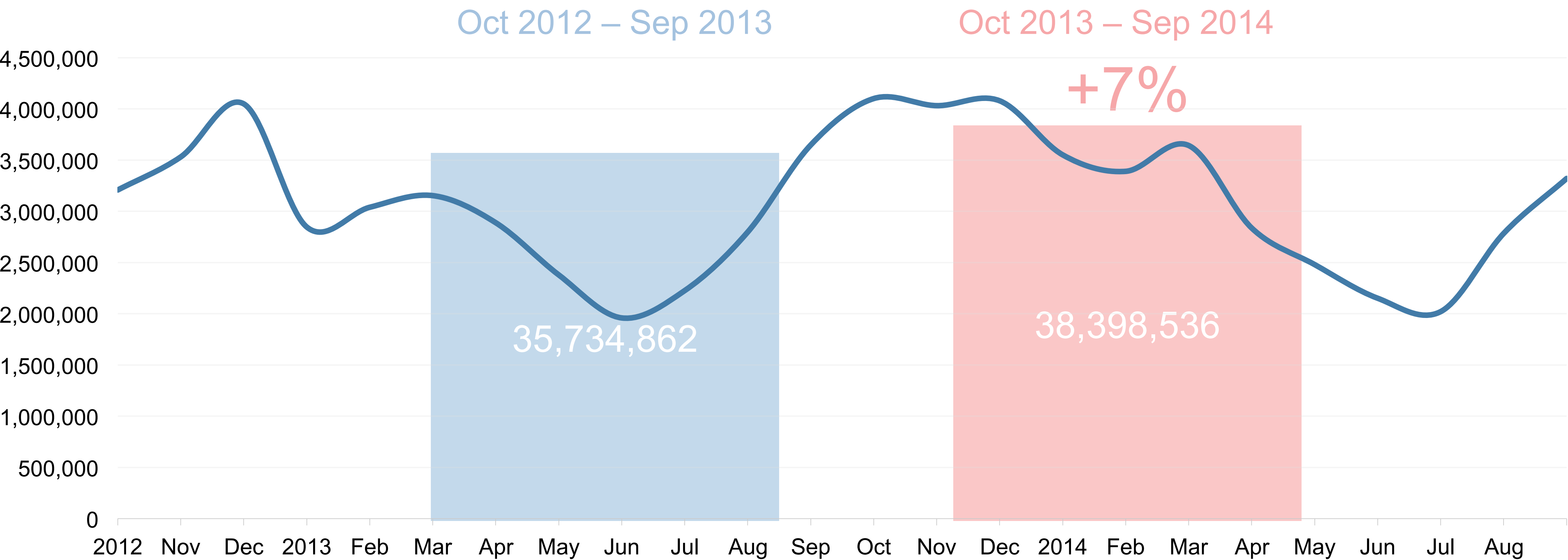
- User interest dynamics in clothing for men, women and kids
- Interest distribution by types of clothing
- Interest seasonality

Clothing query dynamics

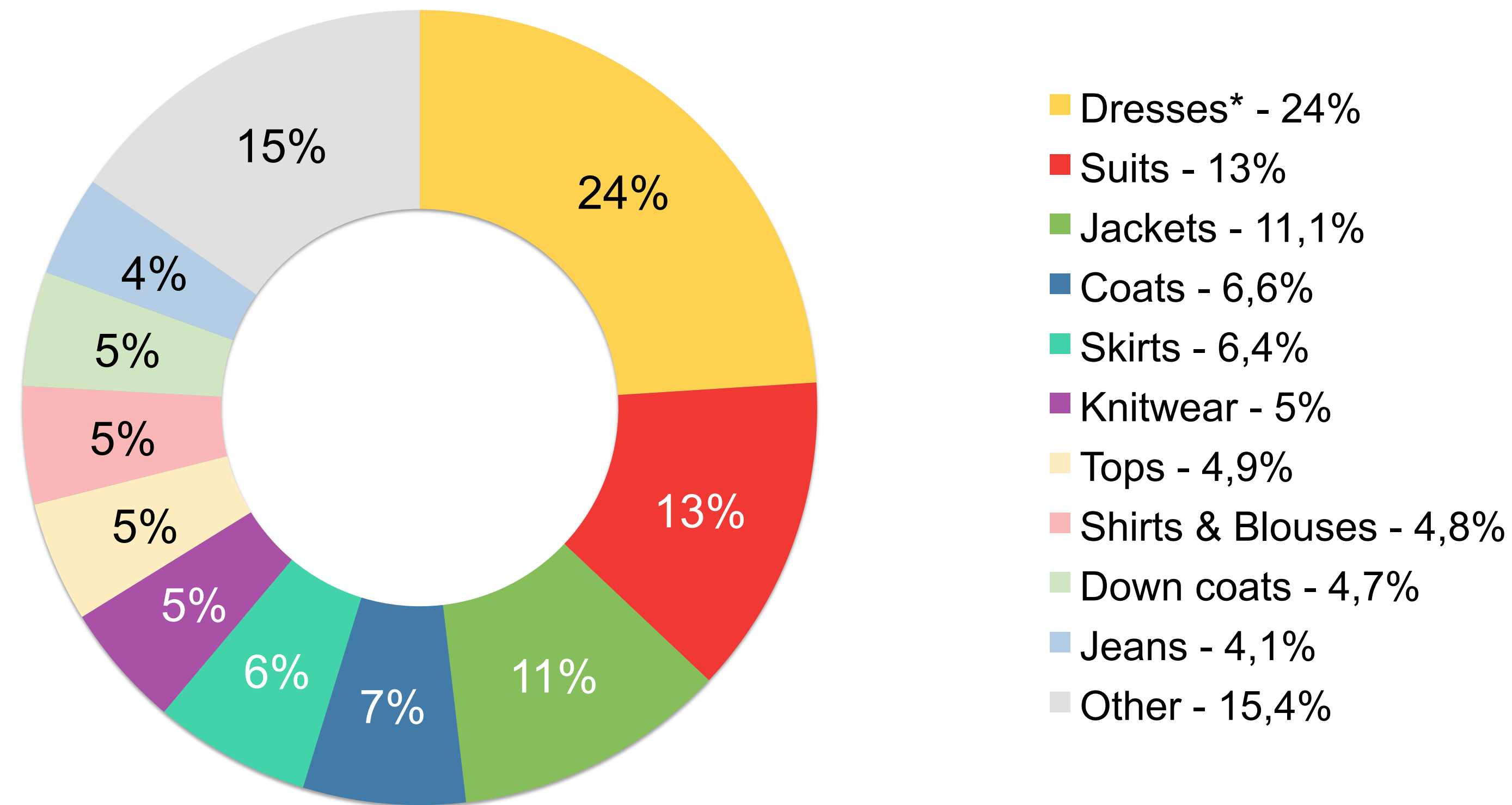


The number of queries on clothing for women is 3-4 times more than for kids and men. However, interest growth in kids' is higher than in women's and men's clothing (+2% compared to -4% and -5% respectively).

Clothing query dynamics (intent queries)



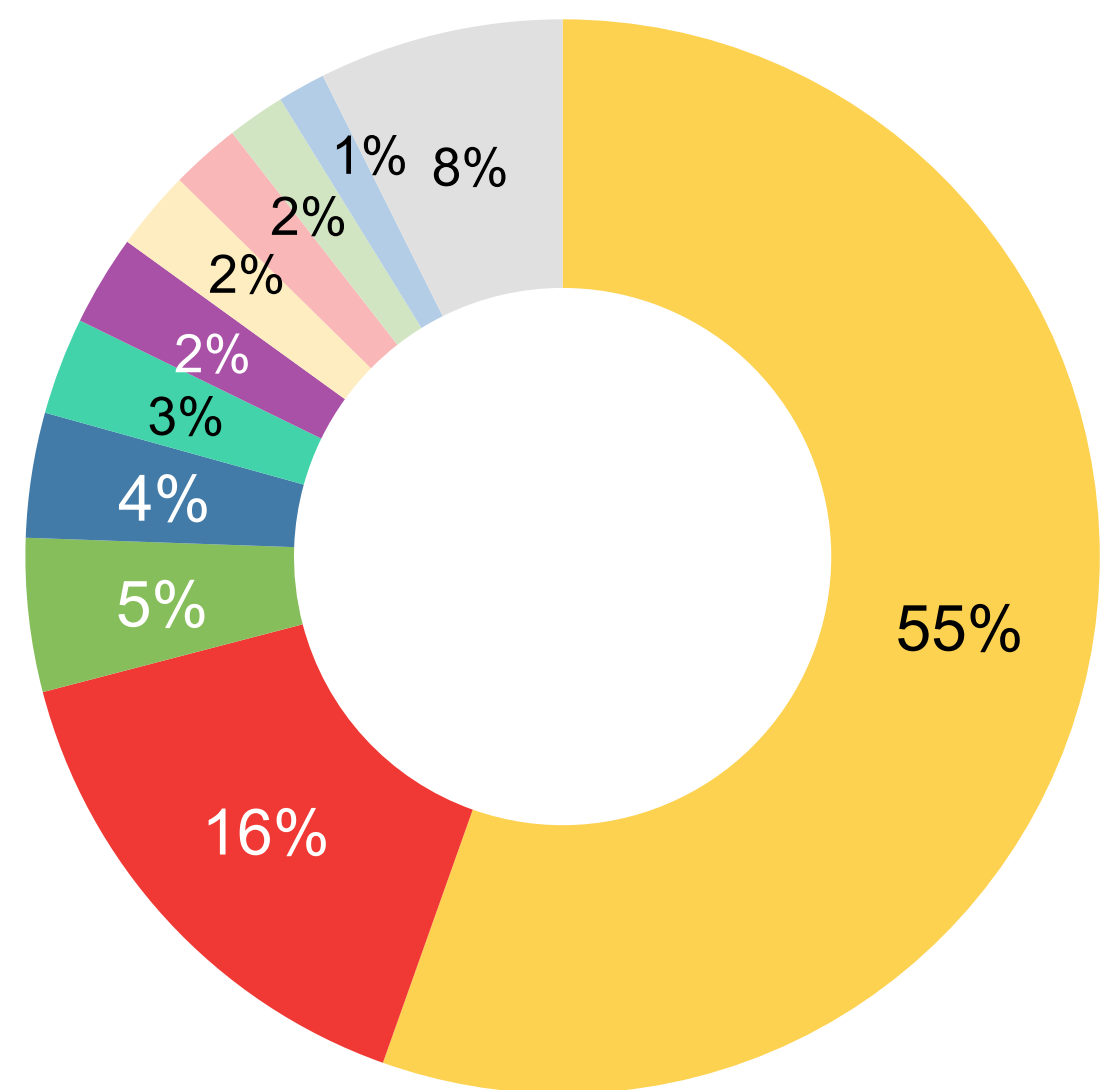
Interest distribution by type of clothing (based on statistics for the last 12 months)



The top-3 most popular search queries are for dresses, suits and jackets, which make up almost half of all queries

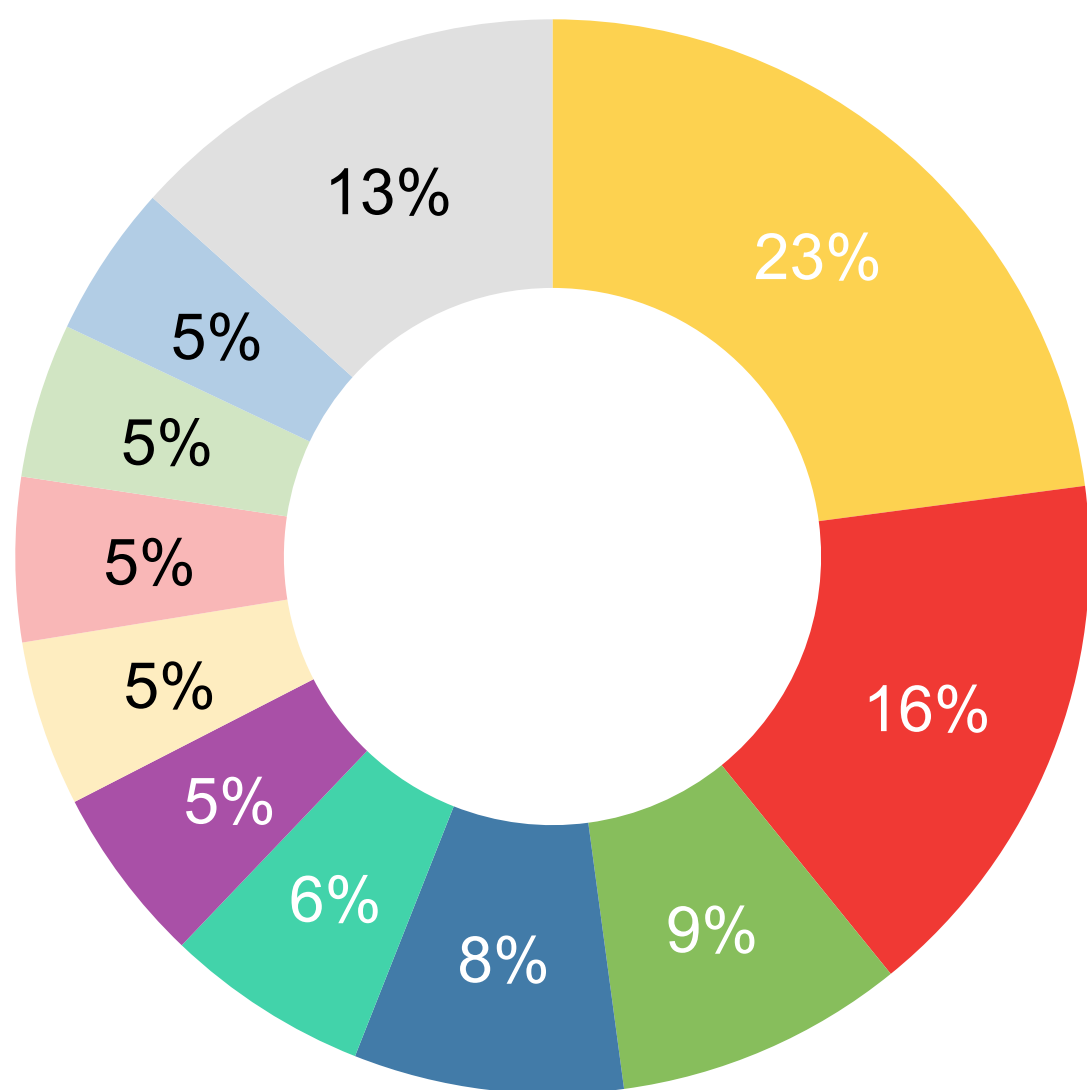
Interest distribution by types of clothing

Women's Clothing



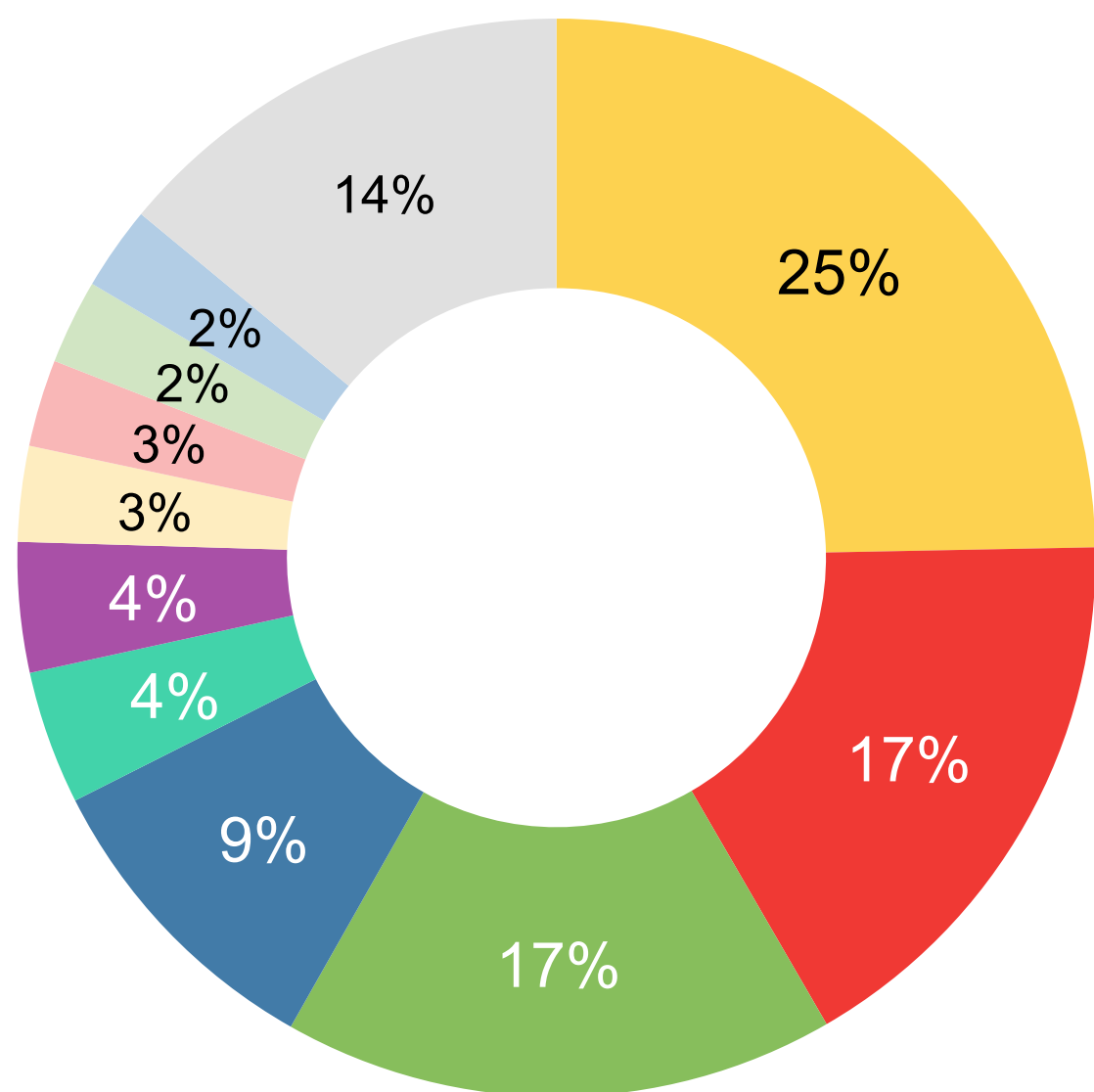
- Dresses* - 55,4%
- Jackets - 4,6%
- Sundresses - 2,9%
- Suits - 2,4%
- Knitwear - 1,7%
- Other - 7,4%
- Skirts - 15,5%
- Shirts & Blouses - 3,8%
- Coats - 2,7%
- Down coats - 2,1%
- Tunics - 1,4%

Men's Clothing



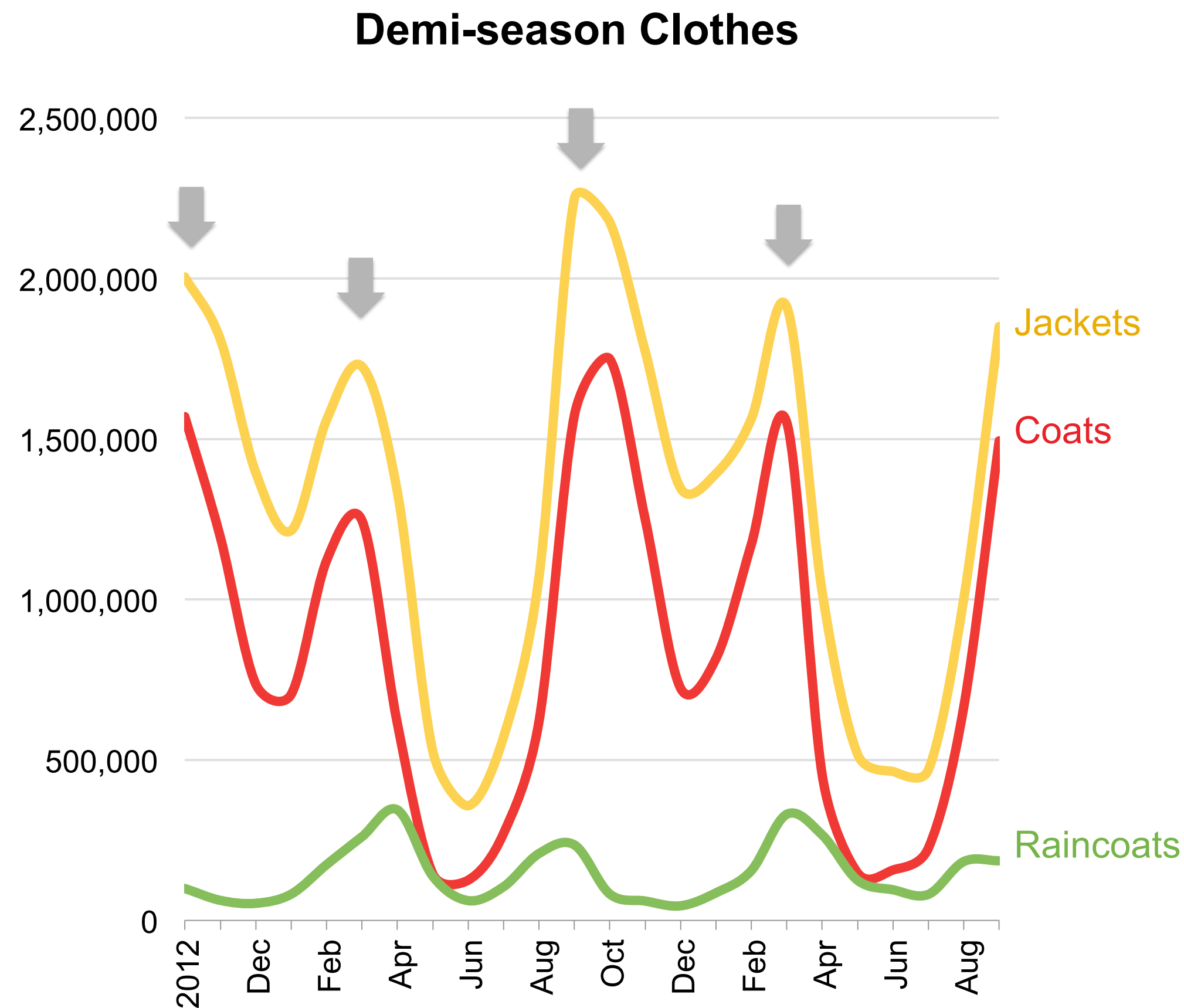
- Jackets - 22,9%
- Shirts - 8,7%
- Jeans - 6,1%
- Tops - 5%
- Knitwear - 4,7%
- Other - 13,4%
- Suits - 16,3%
- Pants - 8,1%
- Coats - 5,3%
- Down coats - 4,9%
- Blazers - 4,6%

Kid's Clothing



- Dresses - 24,7%
- Rompers & Jumpsuits - 16,6%
- Pants - 4%
- Knitwear - 2,9%
- Skirts - 2,5%
- Other - 14%
- Suits (evening gown) - 16,9%
- Jackets - 9,4%
- Coats - 3,9%
- Down coats - 2,6%
- Vests - 2,5%

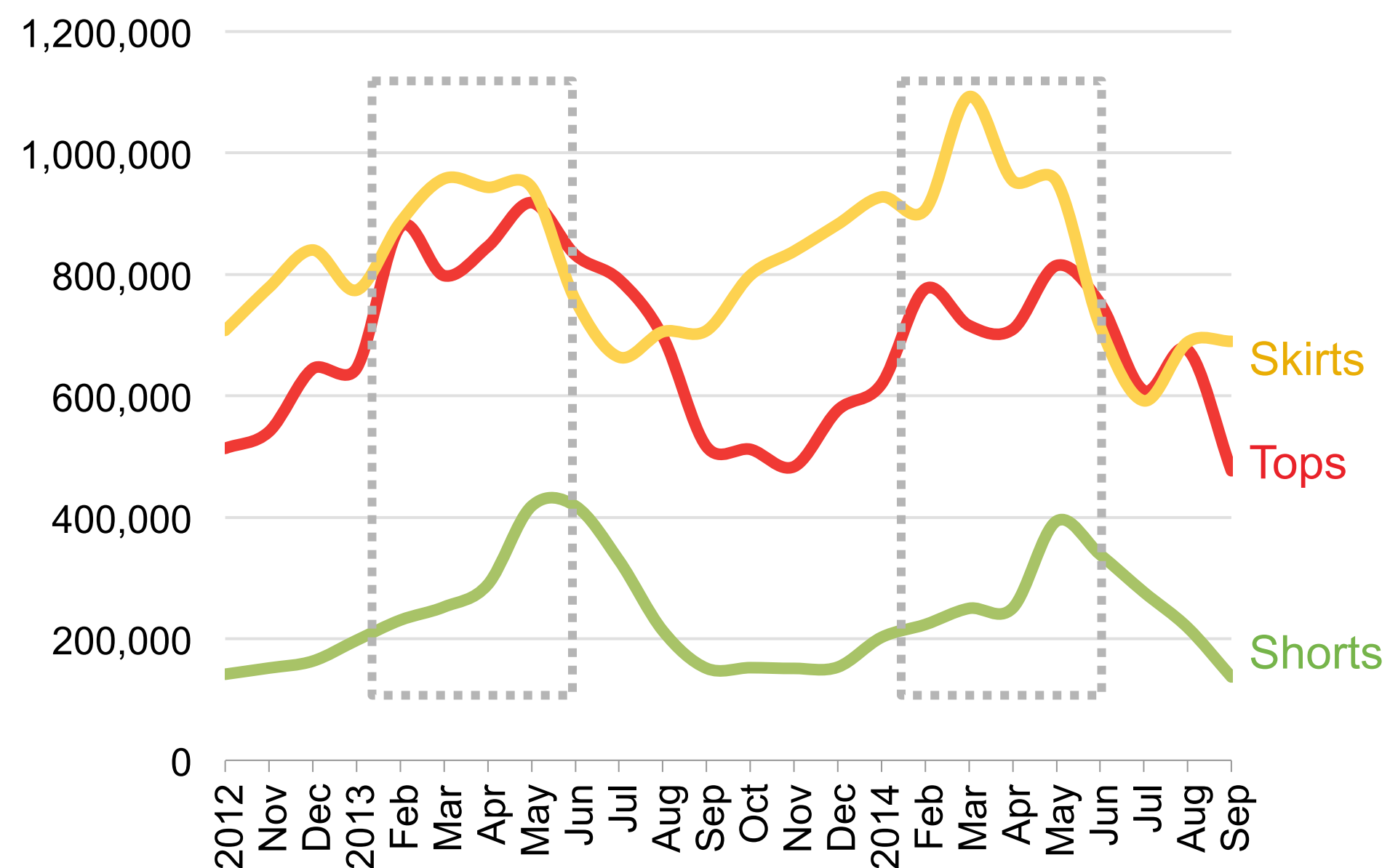
Outerwear query dynamics



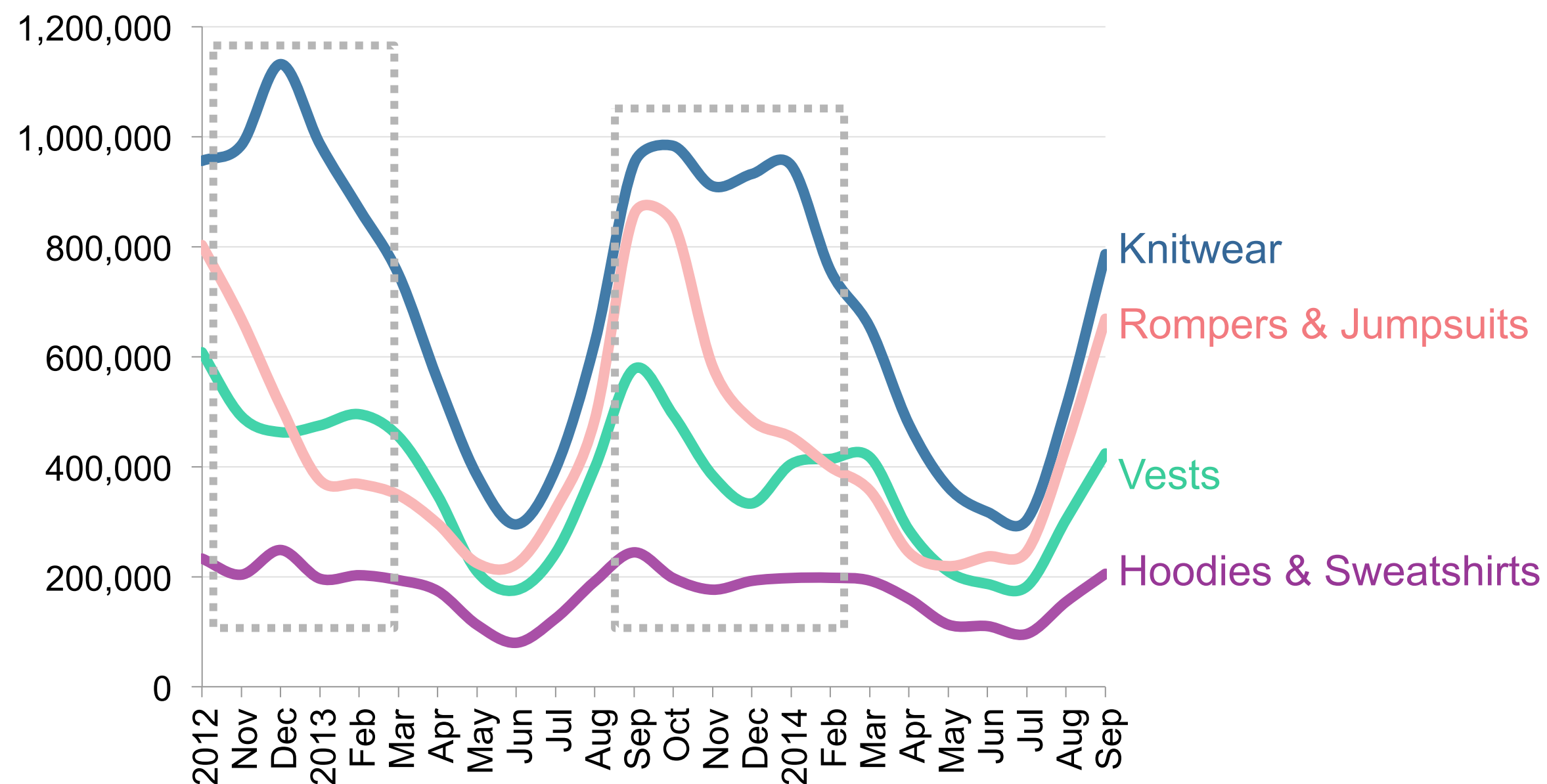
Queries associated with outerwear are characterized by a pronounced seasonality. The demi-season clothes reach interest peaks in October and March. The winter clothes peak from October–November.

Types of clothing query dynamics

Spring Seasonality



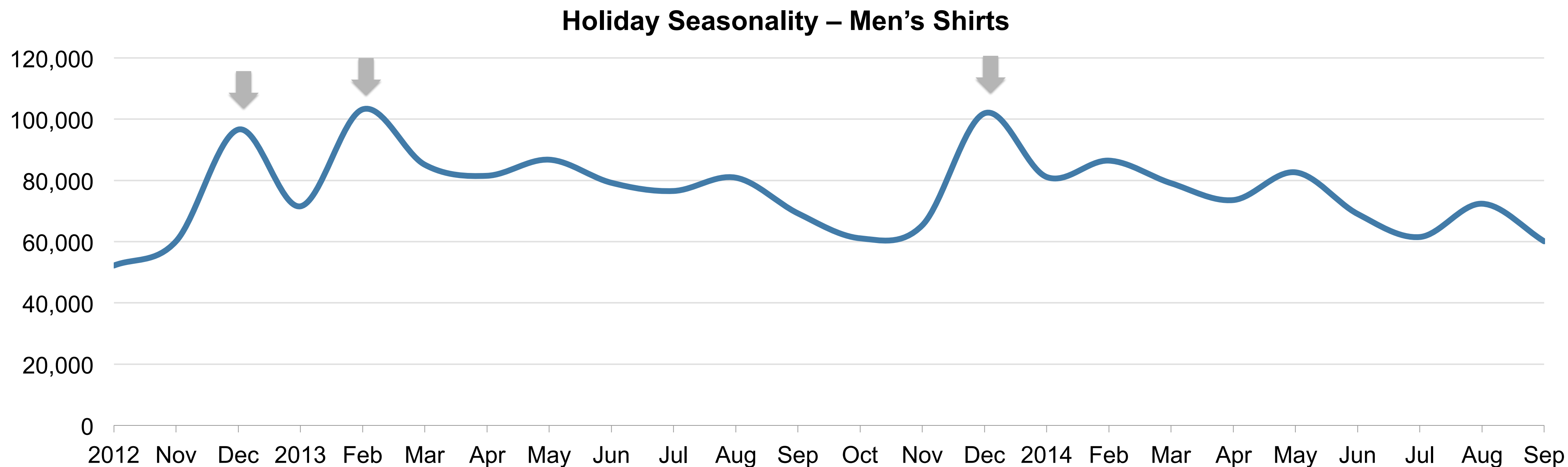
Fall–Winter Seasonality



There are several models of seasonality:

- Types of clothes, popular in spring and autumn (peaks in October, March) – jackets, coats;
- Clothes with growing interest in the spring only (the peak in March–April) – tops, skirts, shorts;
- Types of clothes with growing interest in the autumn–winter – knitwear, vests, hoodies and winter outerwear;
- Queries with clear «festive» seasonality (growth before the New year and the February 23rd holidays) – men's shirts.

Types of clothing query dynamics

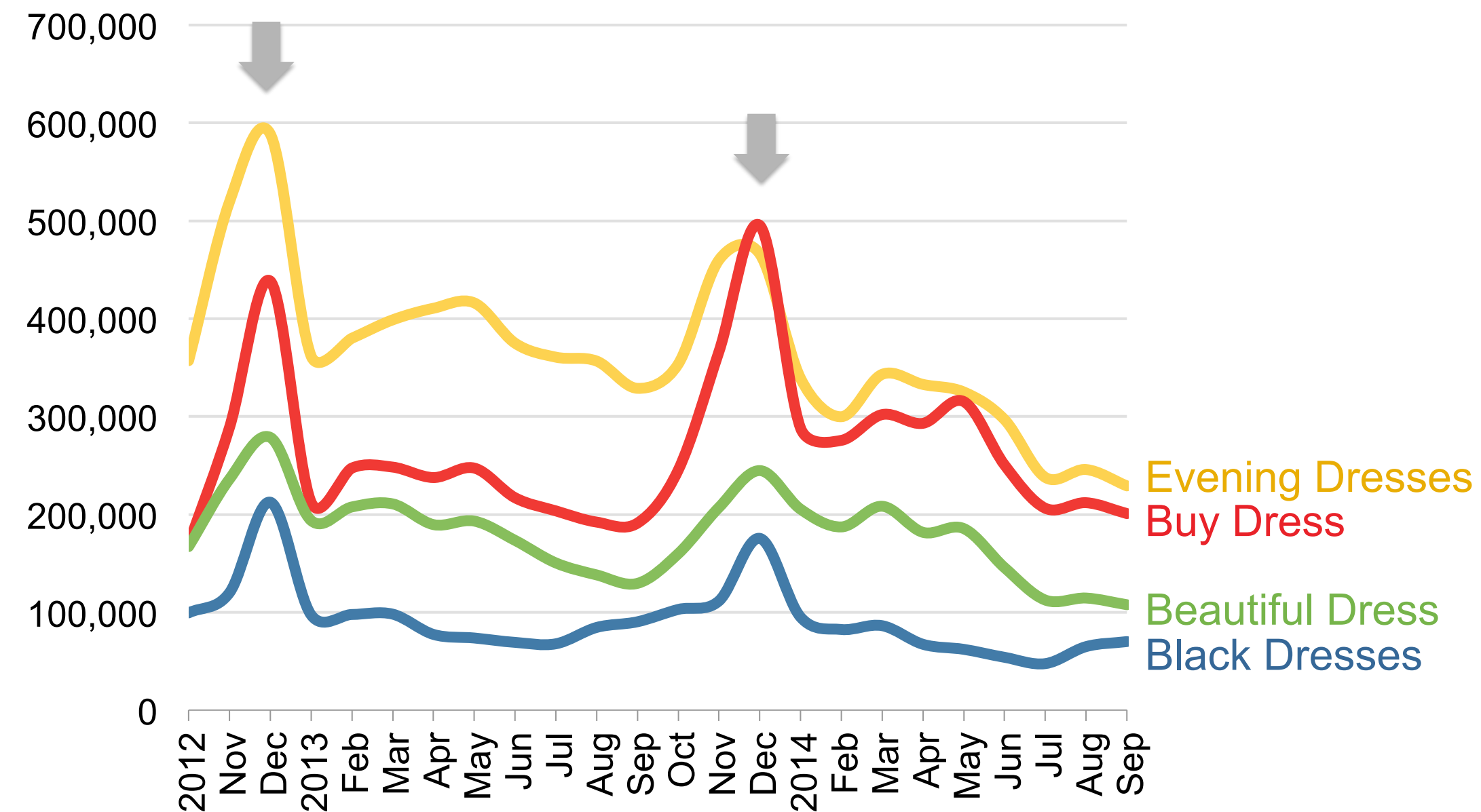


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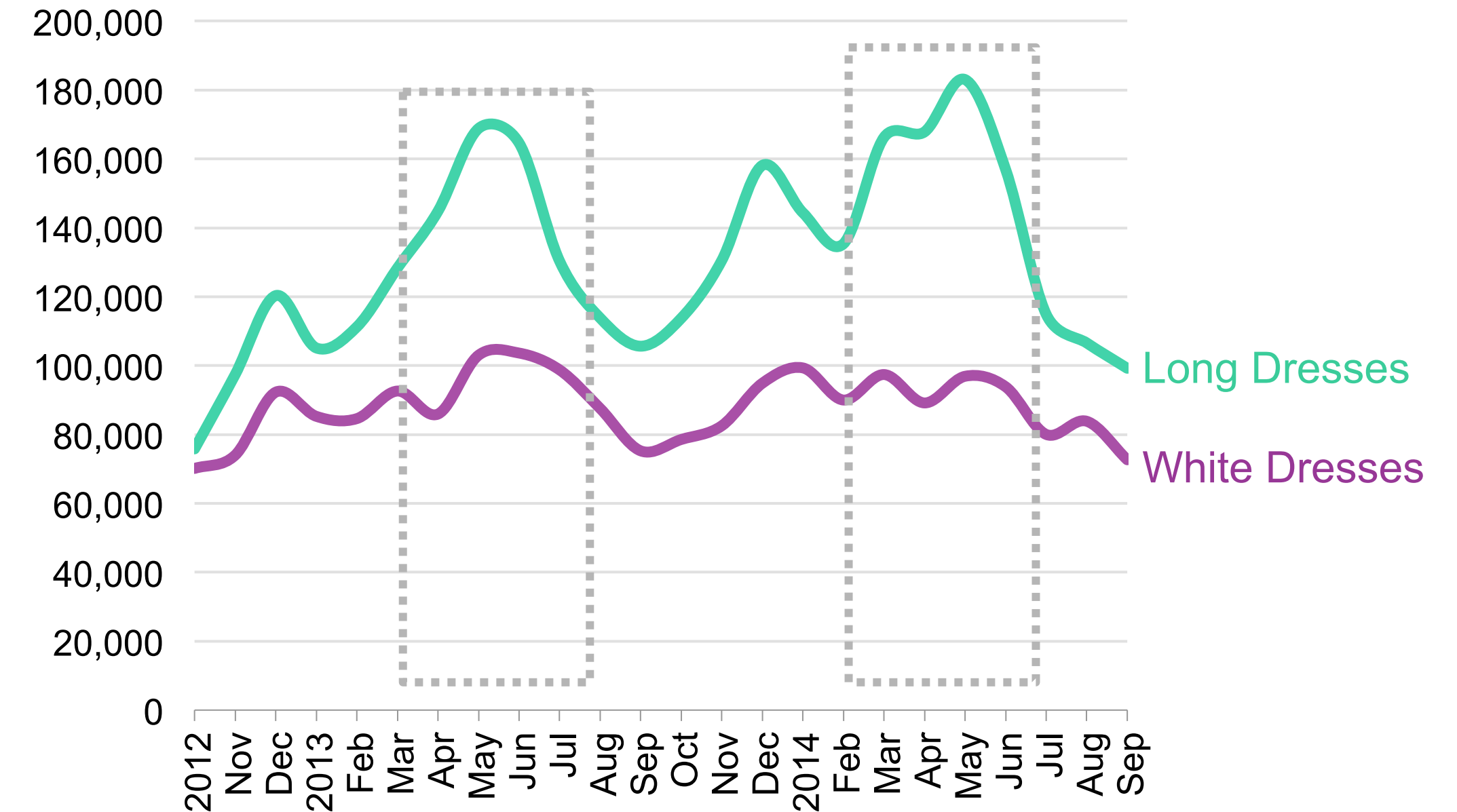
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Dresses query dynamics

Holiday Seasonality



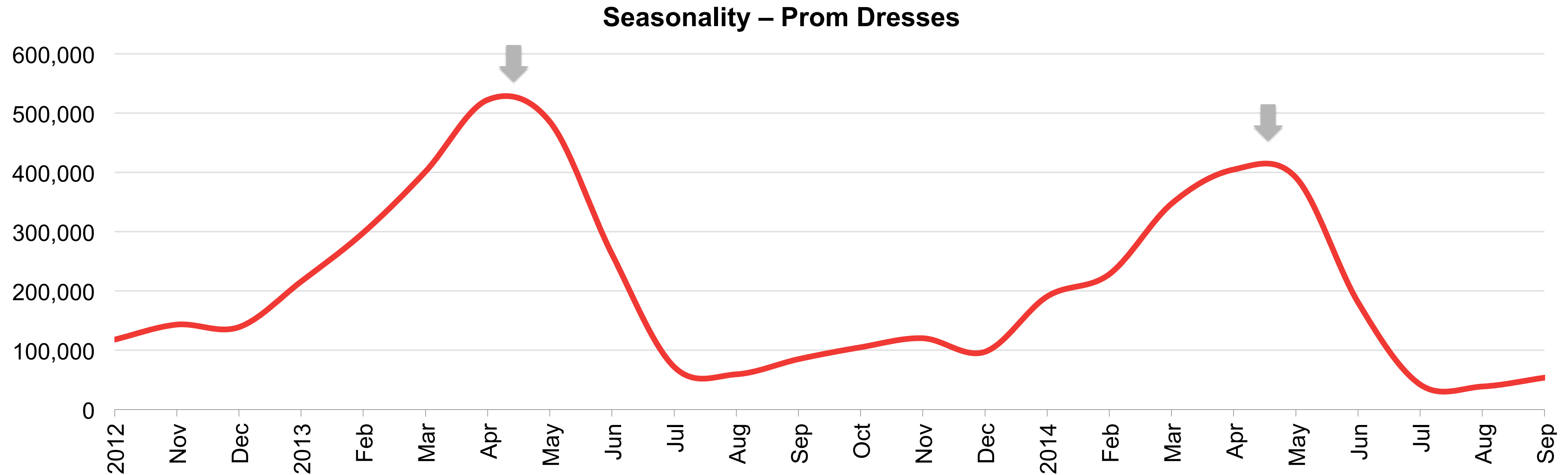
Spring–Summer Seasonality



Queries on dresses can be divided into three groups :

- Dresses for the New Year celebration
- Dresses of new spring-summer collection
- Prom Dresses

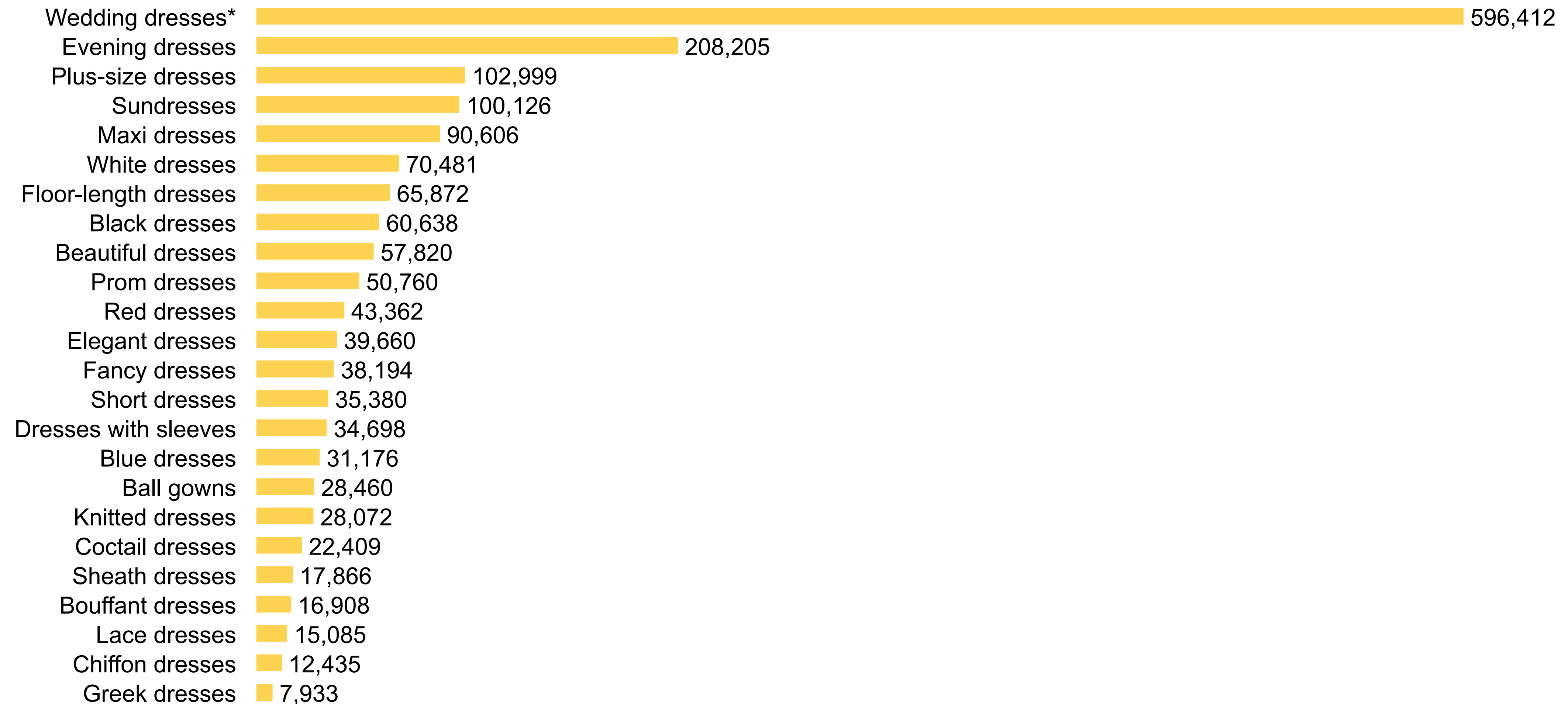
Dresses query dynamics



Queries on dresses can be divided into three groups:

- Dresses for the New Year celebration
- Dresses from new spring-summer collection
- Prom Dresses

Popular queries for types of dresses

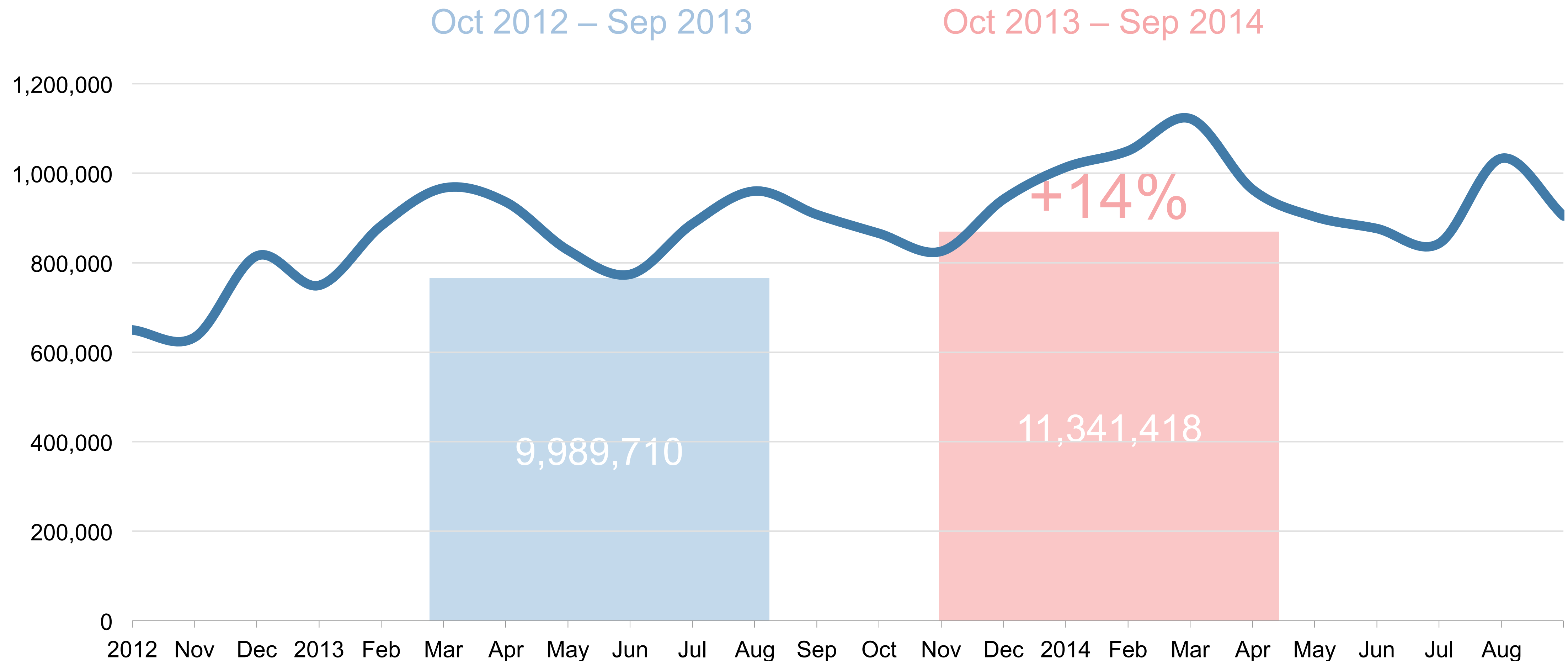


* Interest in wedding dresses was not taken into account in the earlier slides on trends in clothing.

Accessories

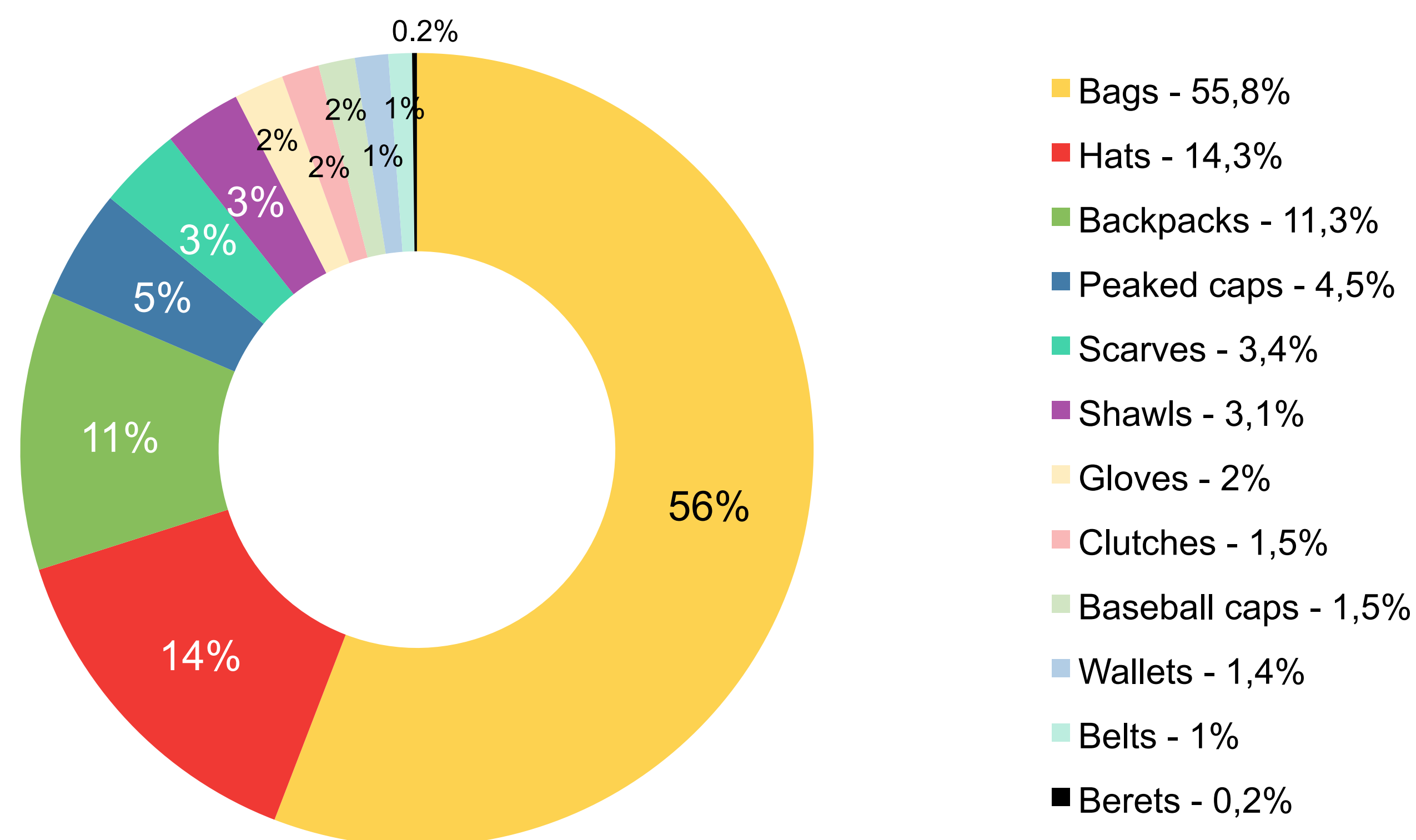
- Interest distribution by types of accessories
- Interest seasonality

Accessories query dynamics (intent queries)



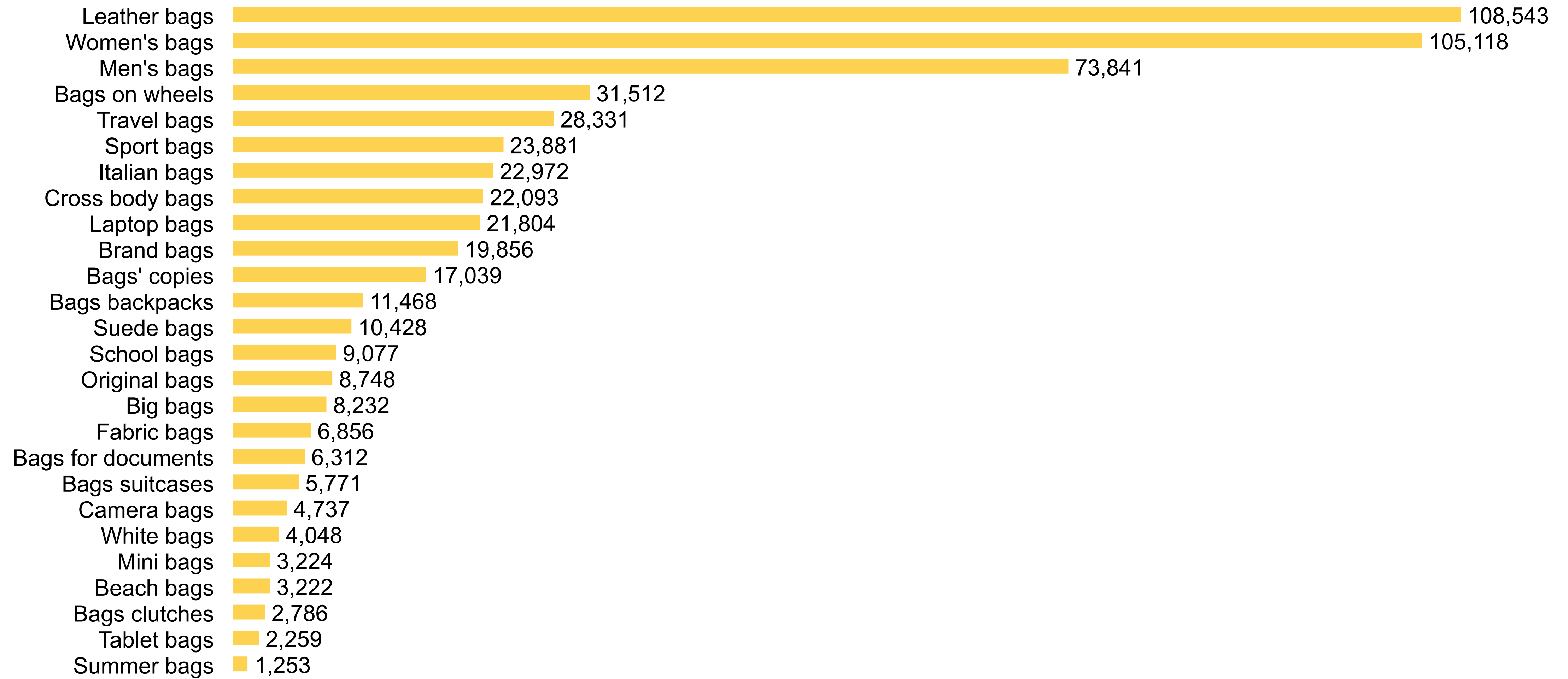
Distribution of queries by type of accessory

(based on statistics for the last 12 months)



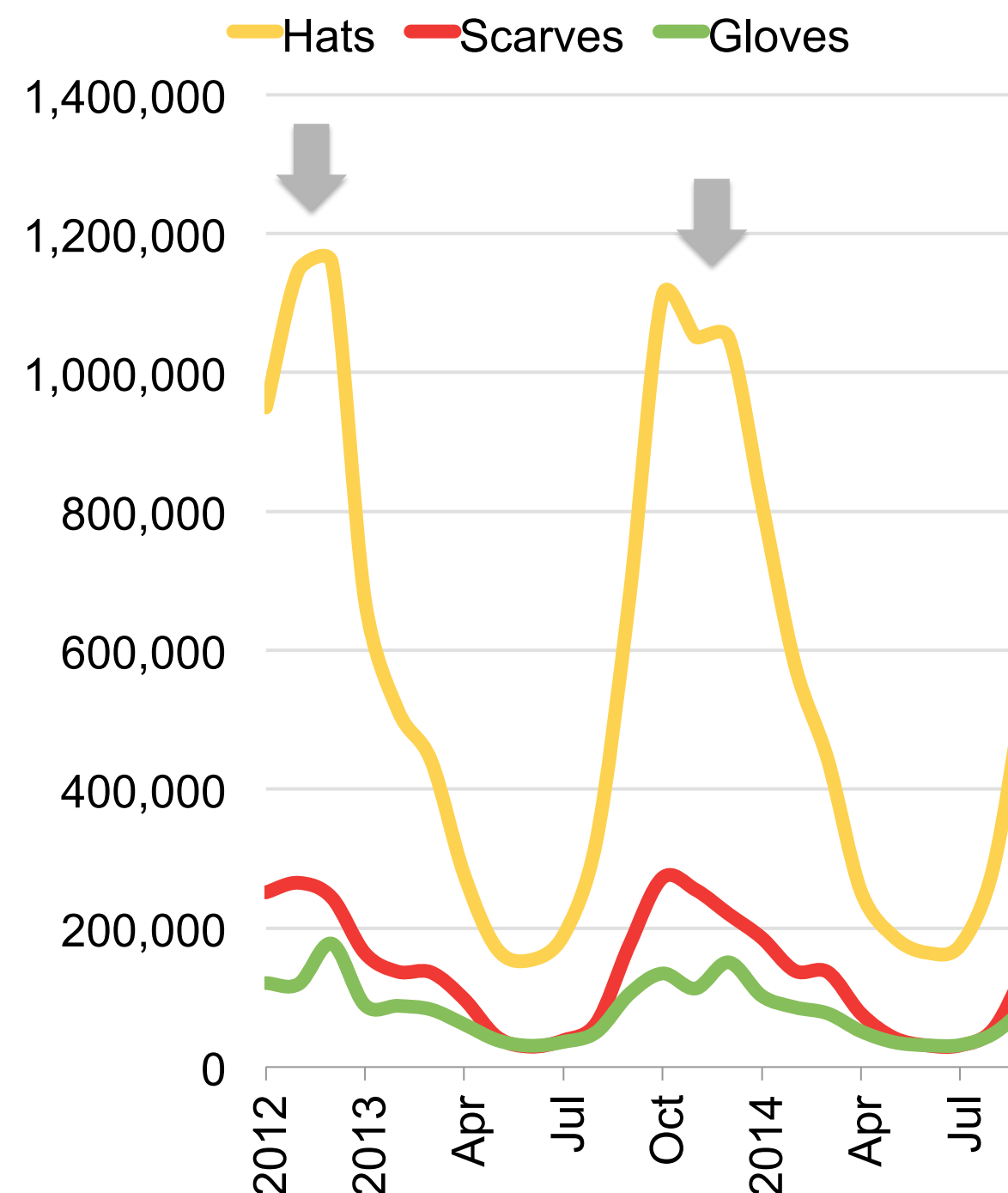
The Top -3 most popular queries are for bags, hats and backpacks, which make up almost 80%.

Popular search queries of kinds of bags

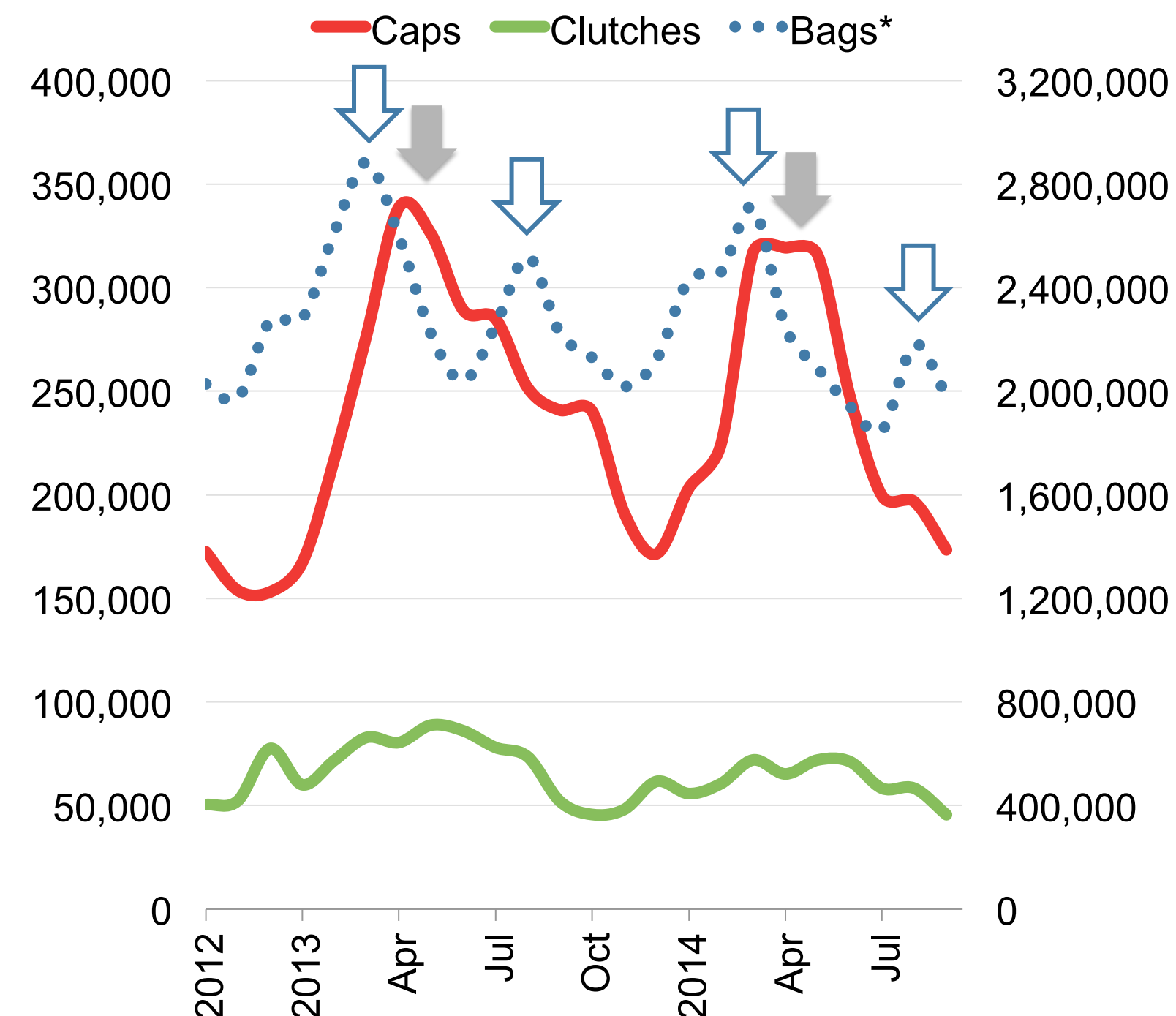


Types of Accessories query dynamics

Autumn–Winter Seasonality

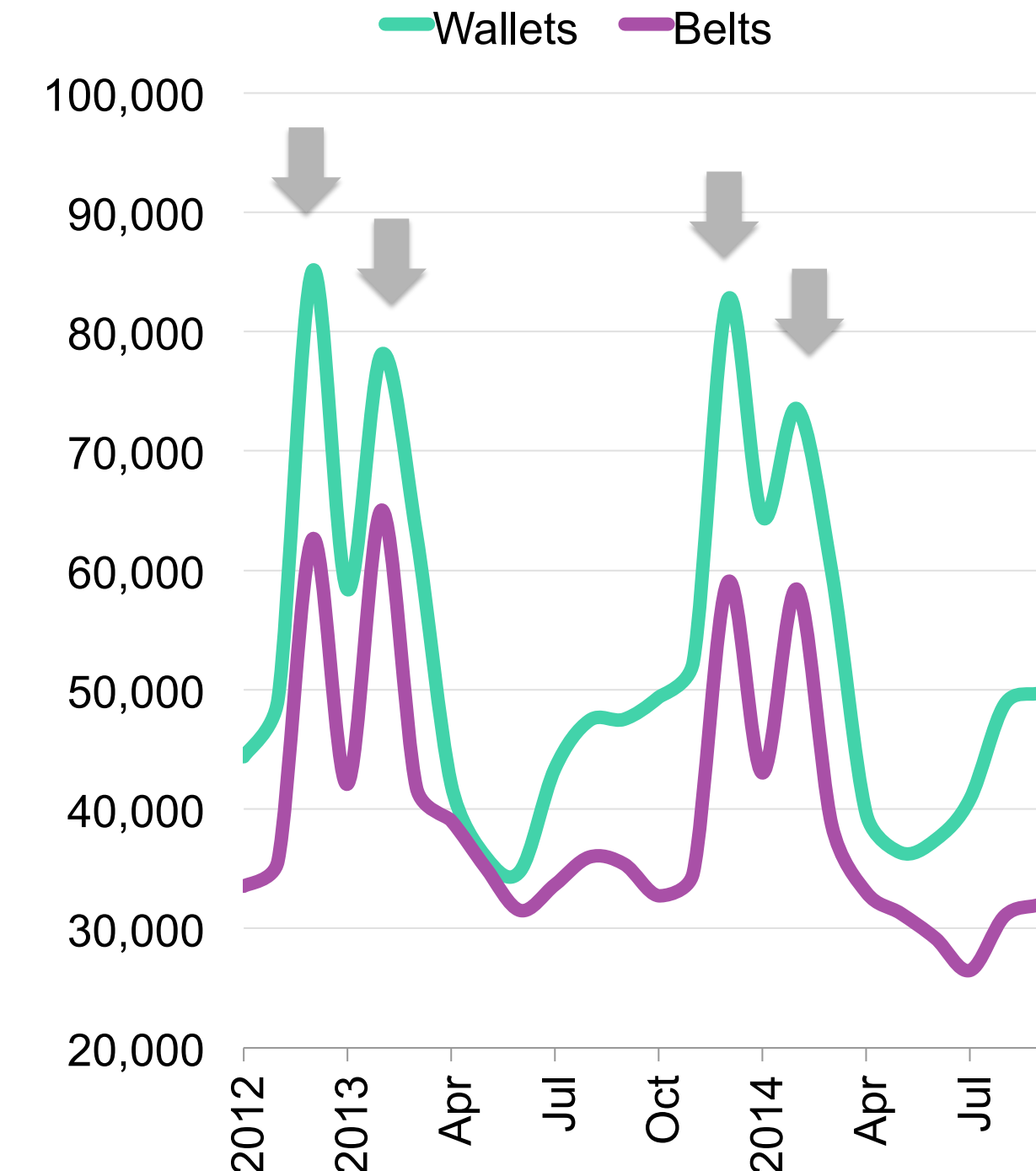


Spring–Summer Seasonality



* The query data on bags are displayed on the right (additional) axis.

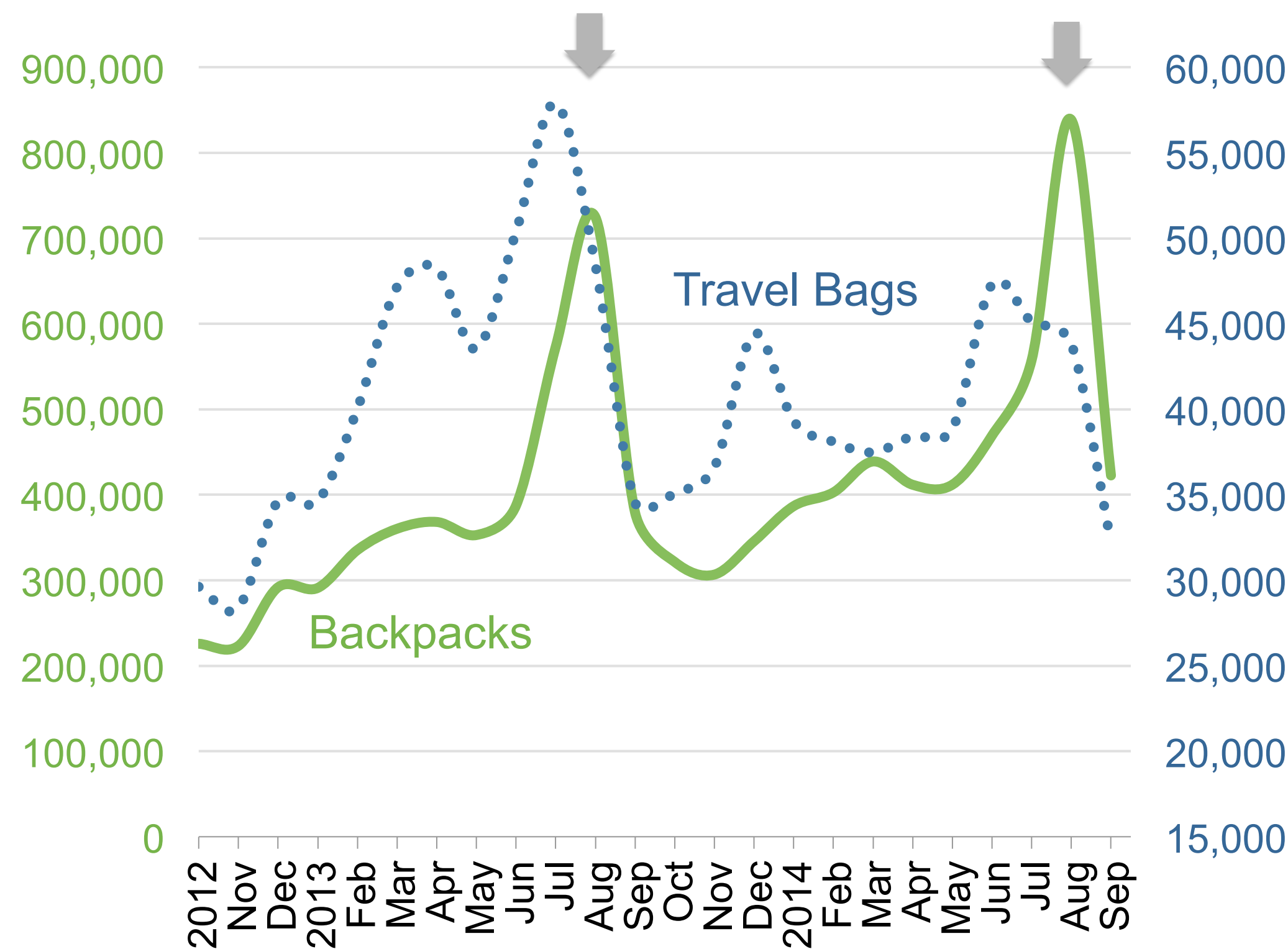
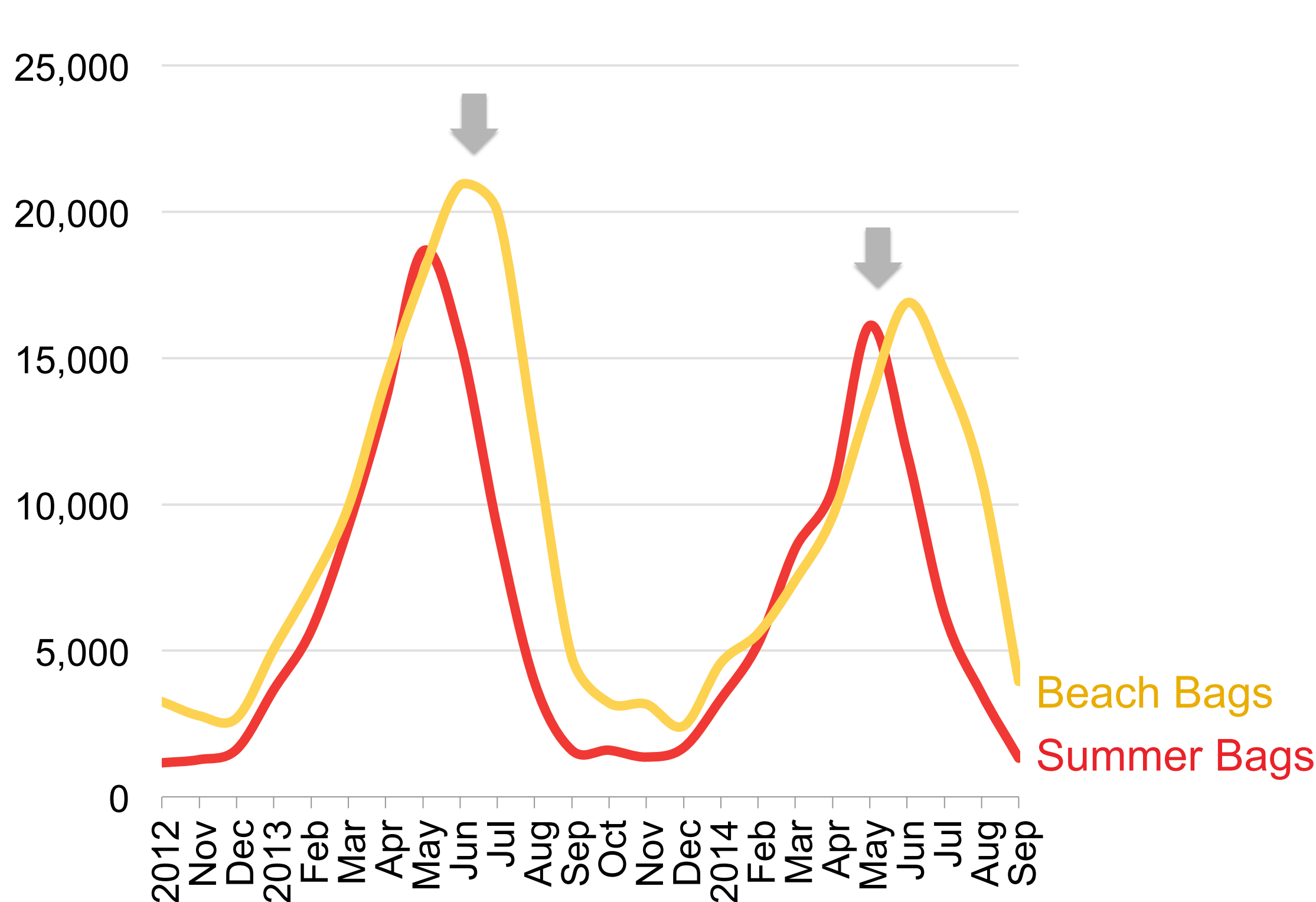
Holiday Seasonality



Bags reach interest peaks in March and August. The August peak is mainly related to interest to the travel bags. User interest dynamics are similar for most popular types of accessories with peaks in the pre-New Year period and February–March (February 23 and March 8 holidays)

Types of bags query dynamics

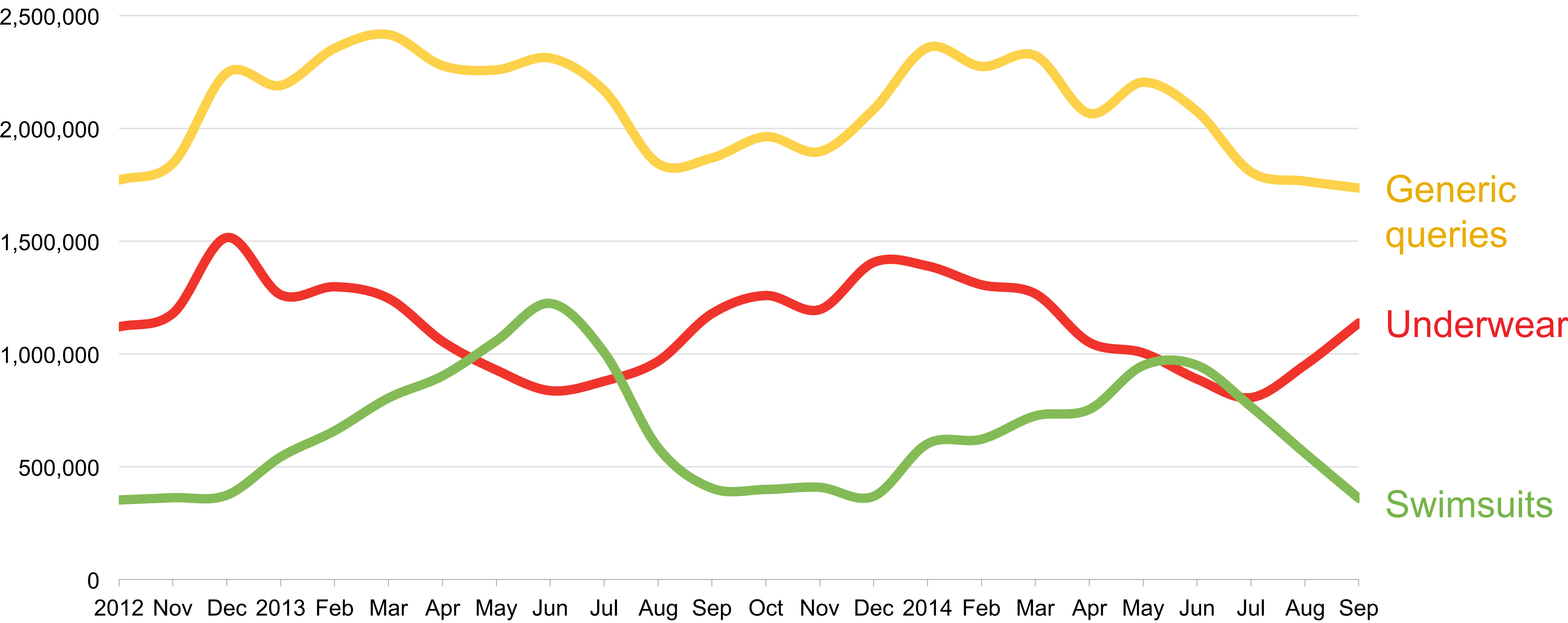
Summer Seasonality



Underwear

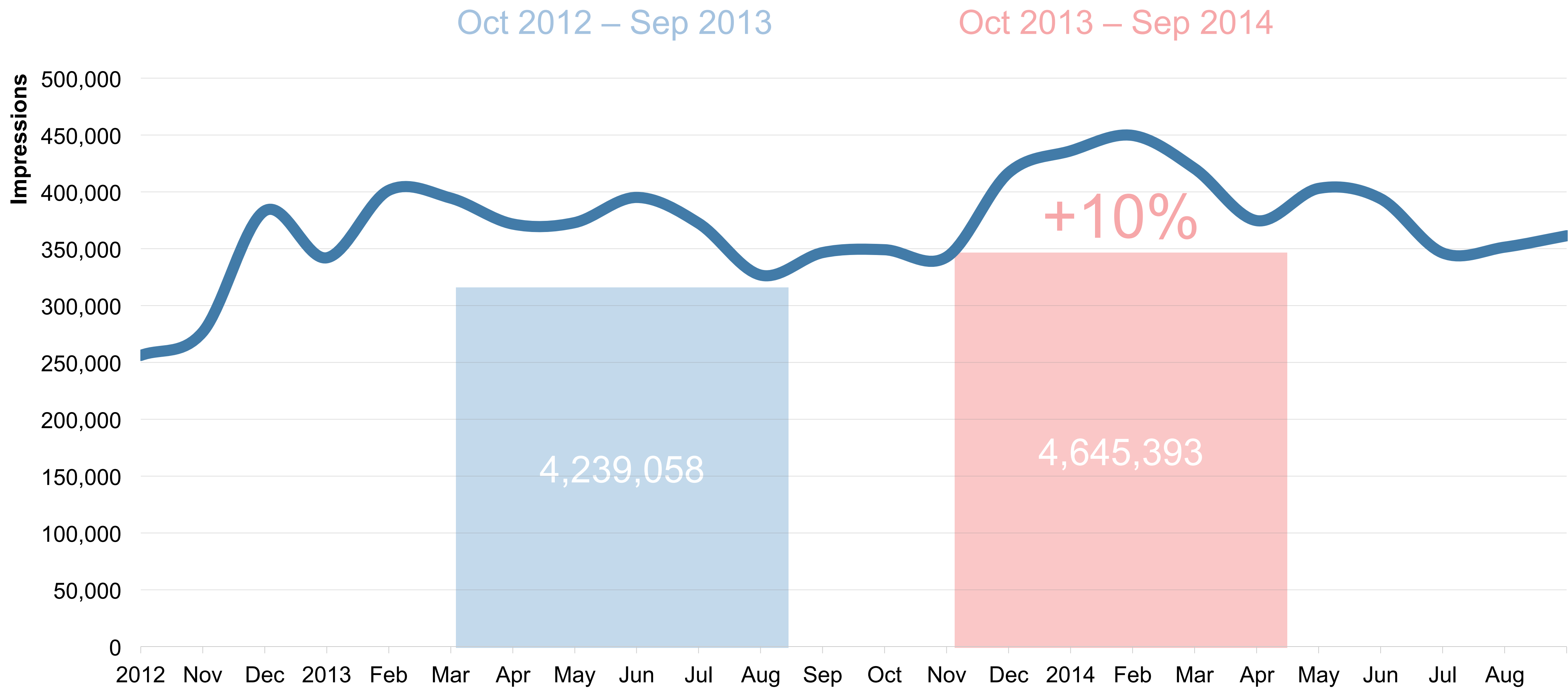
- Interest seasonality
- Interest distribution by types of underwear

Underwear query dynamics



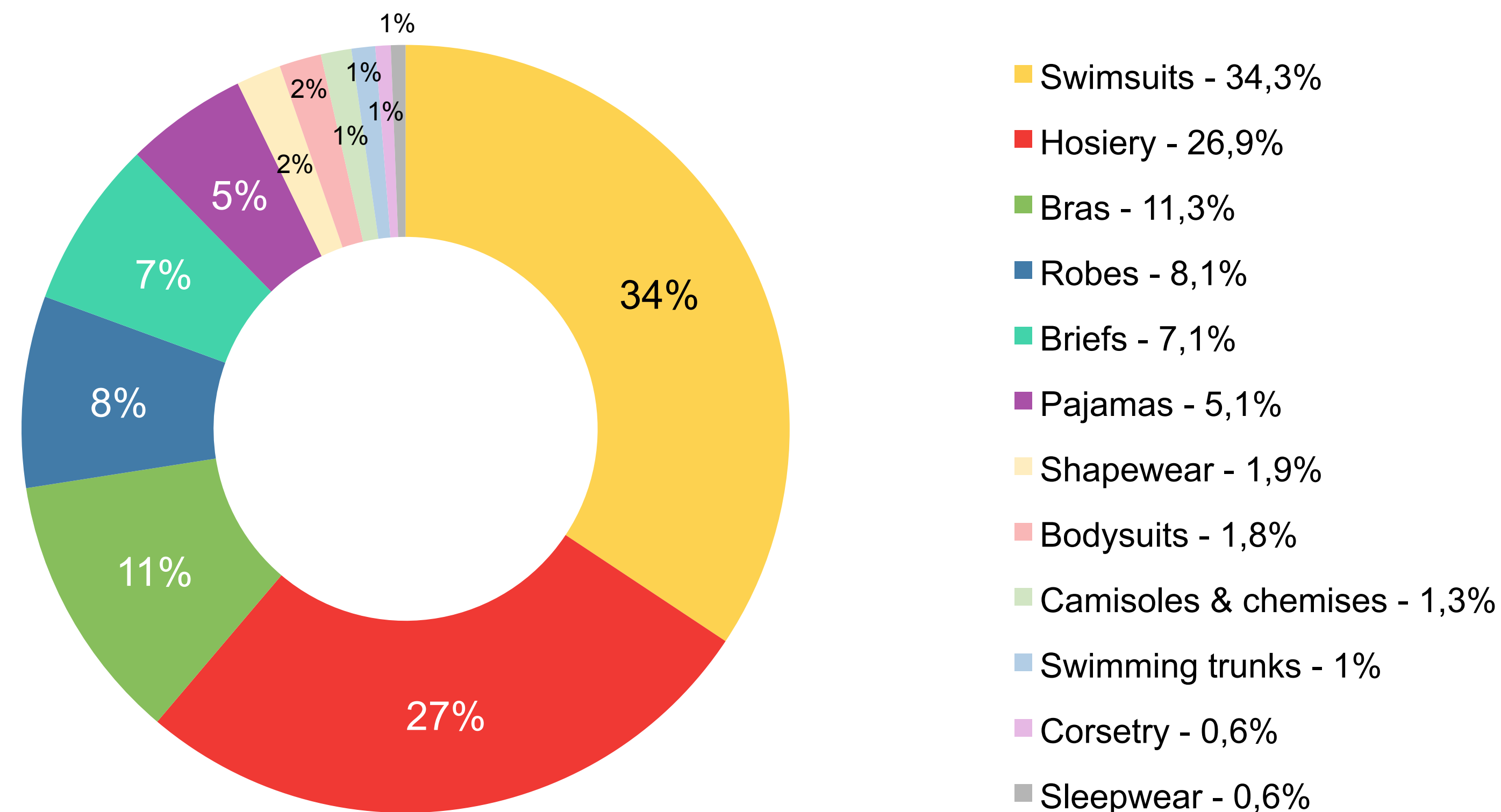
The seasonality of interest in Lingerie is almost the reverse of interest in Swimsuits

Underwear query dynamics (intent queries)



Interest distribution by types of underwear

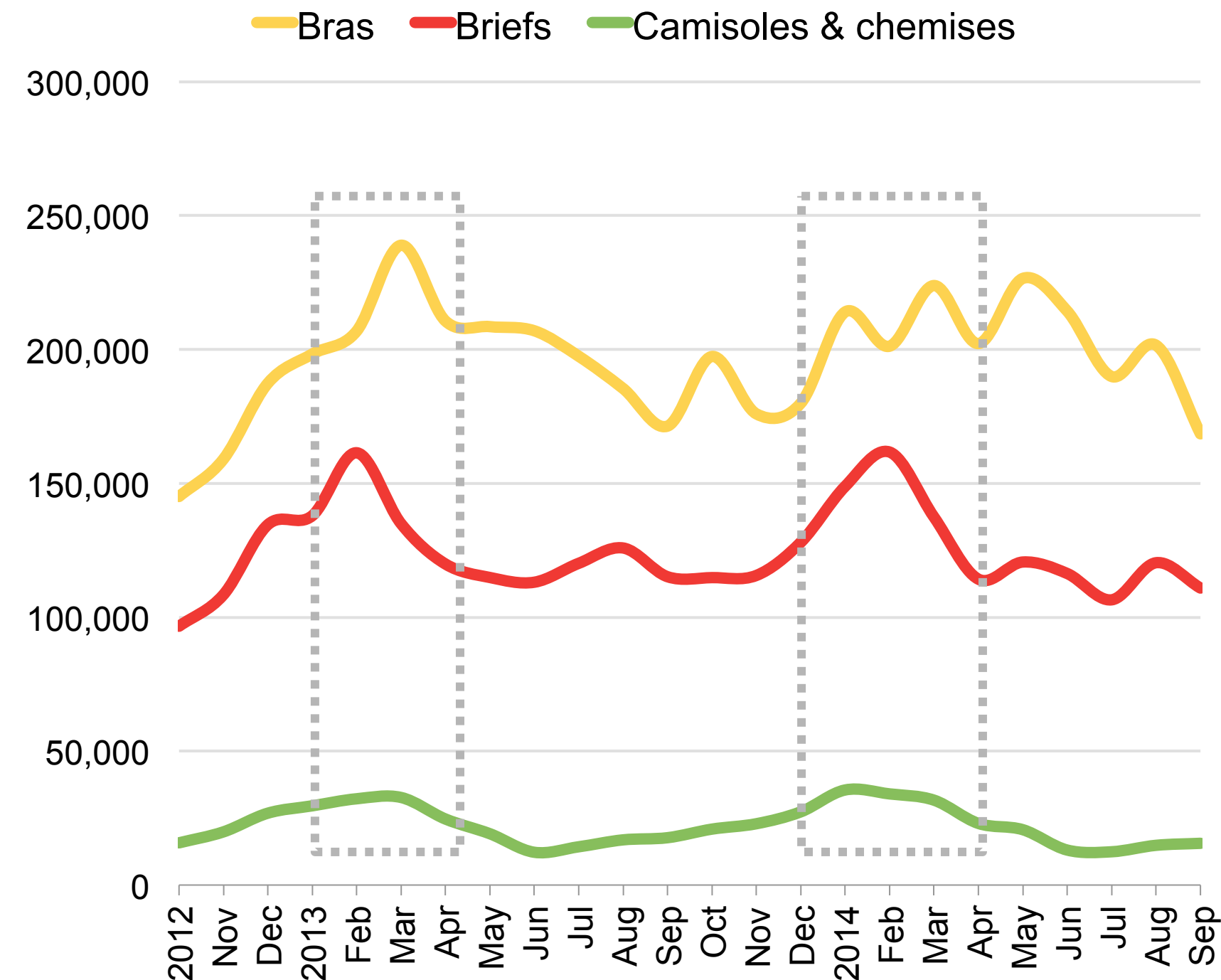
(based on statistics for the last 12 months)



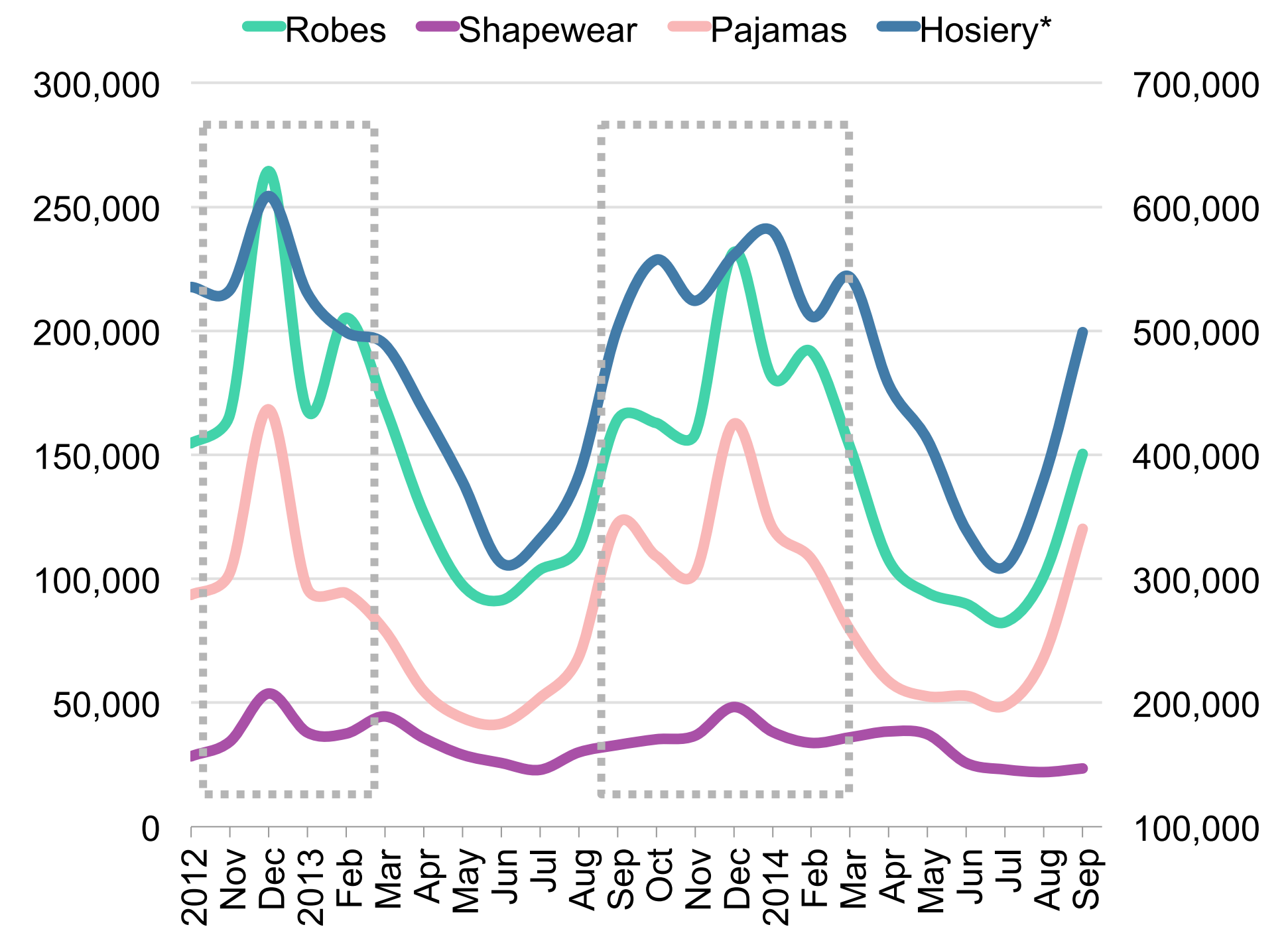
The Top 3 most popular search queries are for swimsuits, hosiery and bras, making up more than 70%.

Types of Underwear query dynamics

Spring Seasonality



Autumn–Winter Seasonality

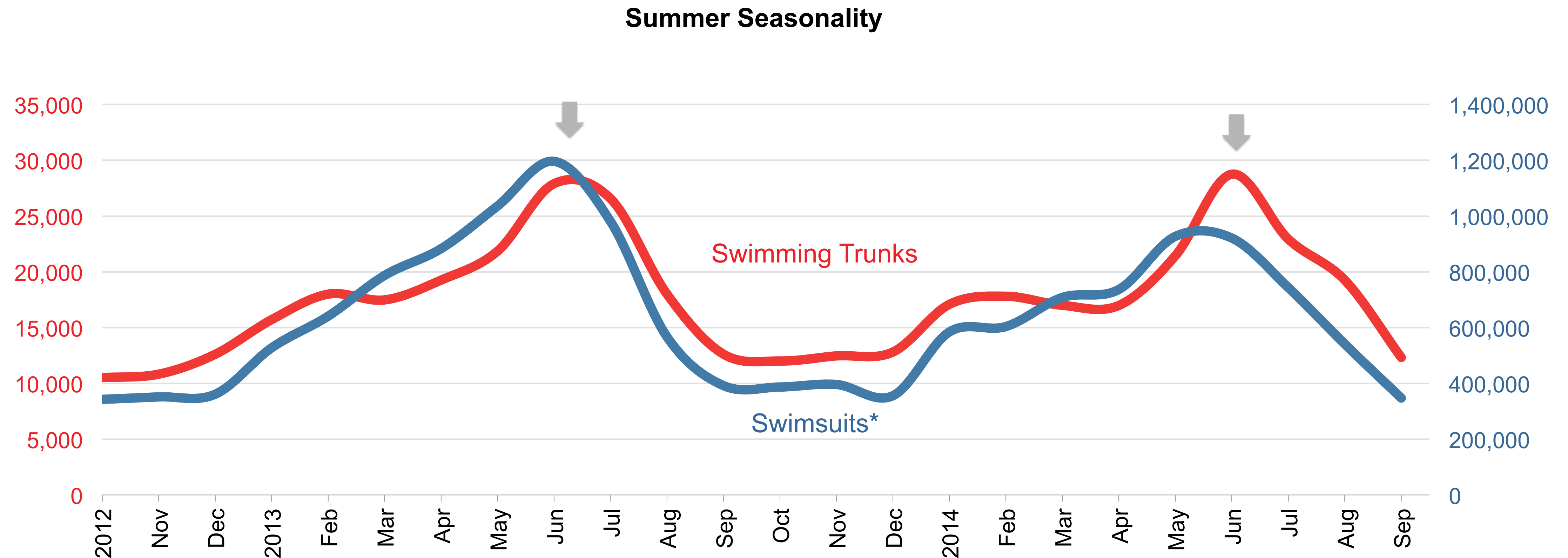


* The query data on Hosiery are displayed on the right (additional) axis.

There are several models of seasonality:

- Lingerie is popular in spring (February–March)
- Underwear and Hosiery: with 2–3 peaks during the autumn–winter season

Types of Underwear query dynamics



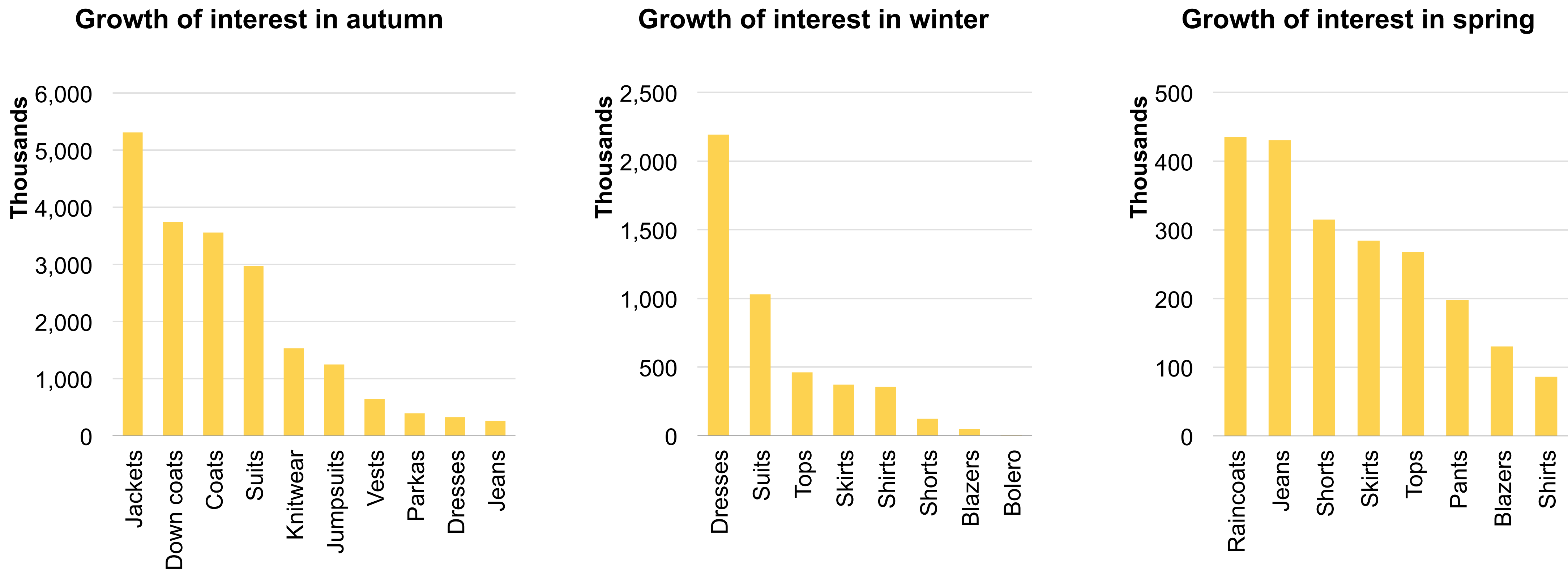
There are several models of seasonality:

- Swimsuits – interest grows right before the summer months

A yellow chevron graphic pointing to the right, containing the text.

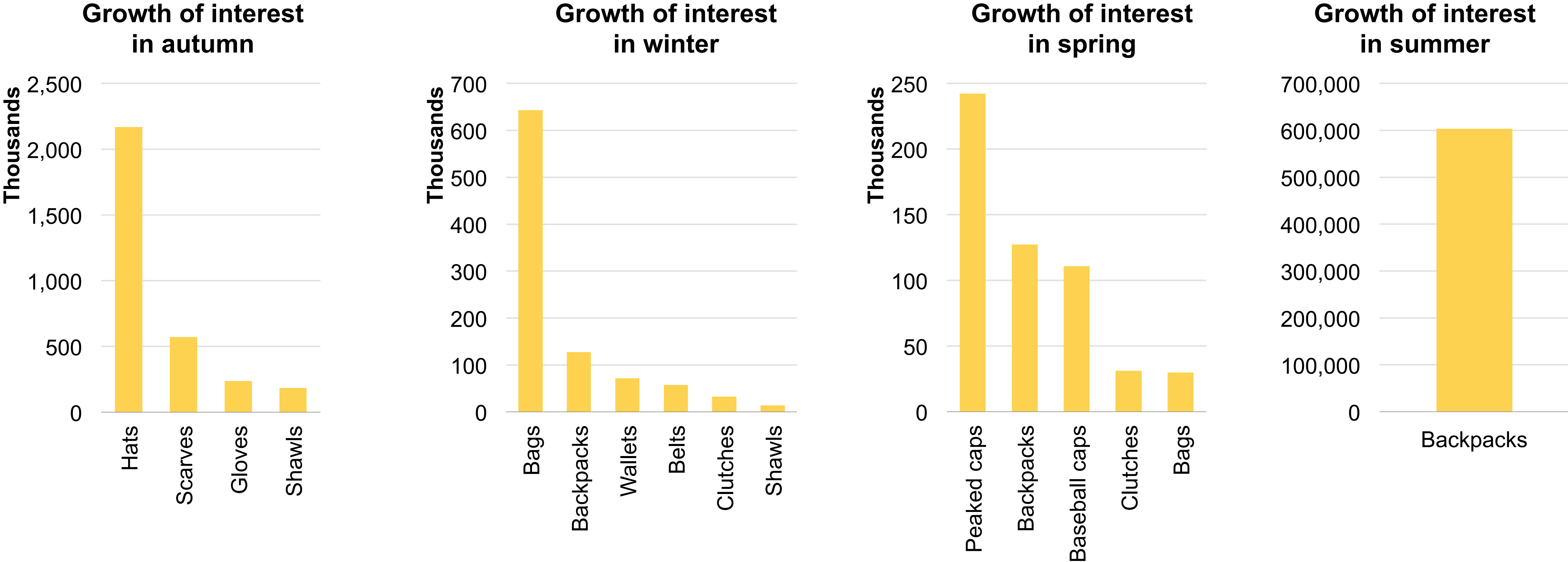
Interest Seasonality in Segment

Main growing Clothing segments (by seasons)



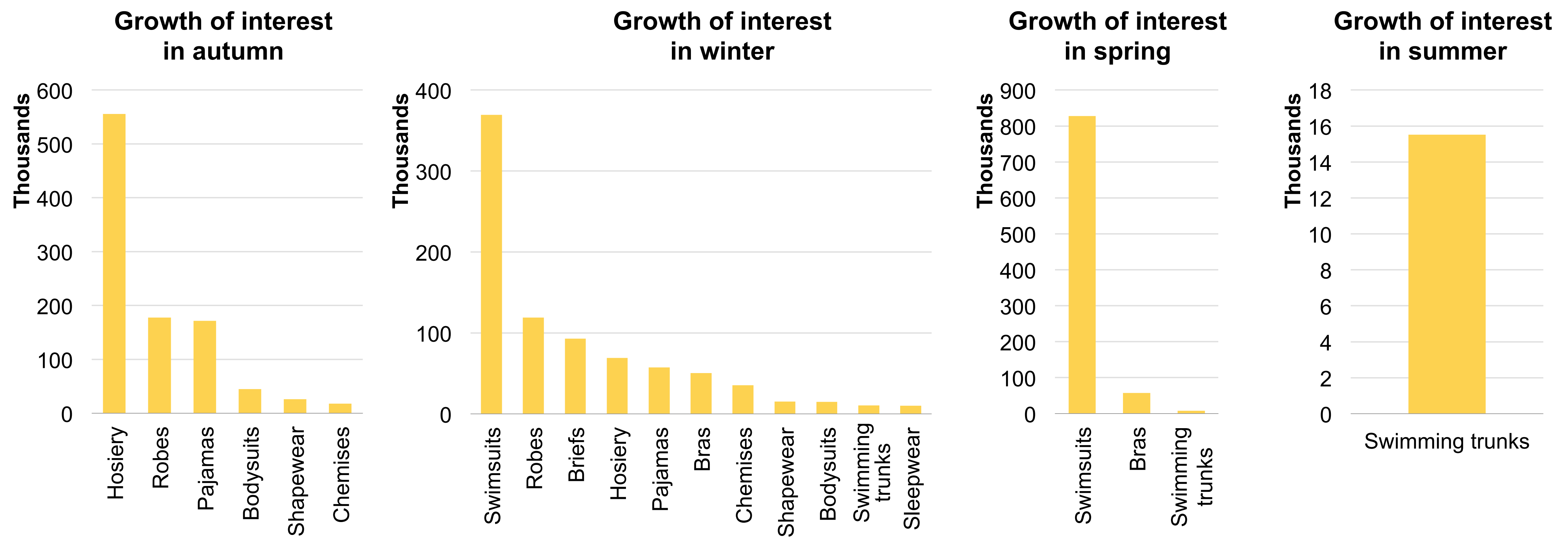
The greatest increase of interest to the clothing segment is in autumn: interest becomes 4.5 times higher than in winter and more than 9 times higher than in spring. There is the decline of interest almost of all types of clothes in summer.

Main growing Accessories segments (by seasons)



The growth of interest in autumn is 3.4 times higher than in winter, 5.9 times higher than in spring and 5.3 times higher than in summer. There is a decline in interest for all types of accessories in summer, except backpacks.



Main growing Underwear segments (by seasons)



The growth The growth of interest at spring is 1.3 times higher than in autumn and 1.1 times higher than in winter. There is insignificant growth of interest in spring–summer, based on interest to swimming trunks and swimsuits.

Season Popularity of Fashion Goods

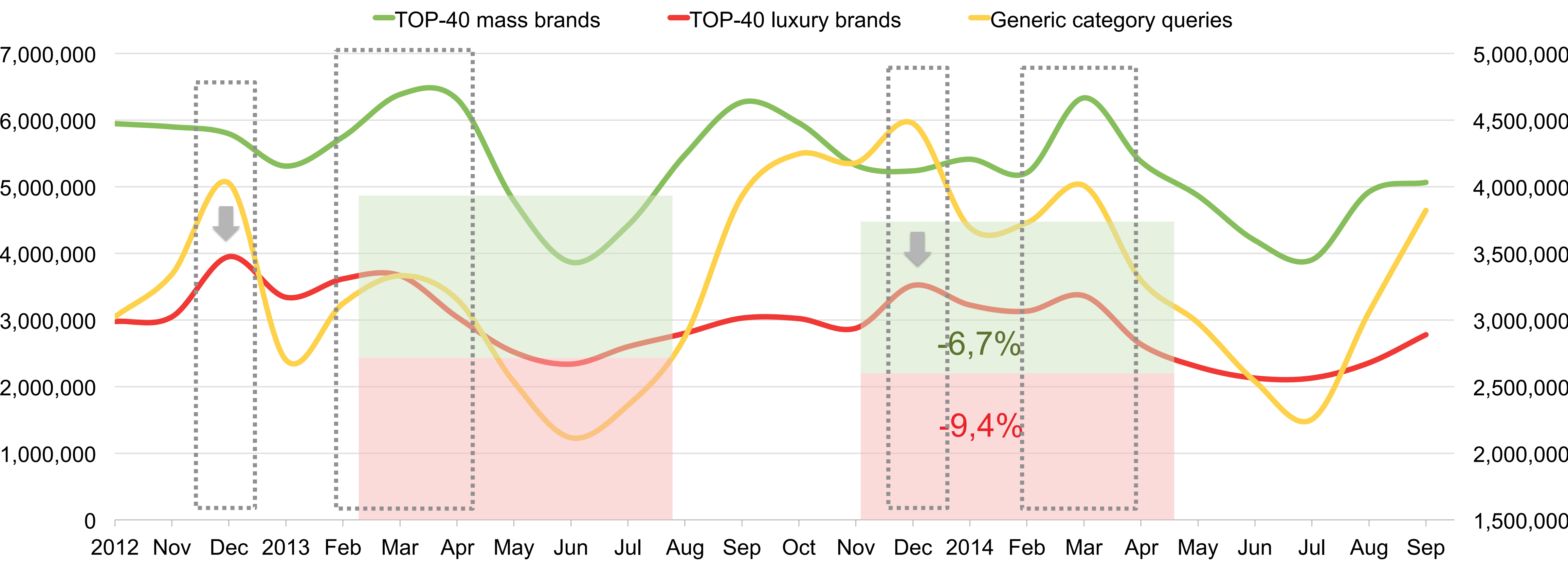
Autumn	Winter	Spring	Summer
Jackets	Dresses	Sneakers	Backpacks
Down coats	Suits	Swimsuits	Rompers & Jumpsuits
Coats	Tops	Sandals	Down coats
Suits	Bags	Pumps	
High boots	Skirts	Raincoats	
Hats	Swimsuits	Bags	
Knitwear	Shirts	Tops	
Rompers & Jumpsuits		Jeans	
Boots		Shorts	
Scarves		Skirts	
Vests		Flats	
Hosiery			
Uggs			
Parkas			
Dresses			

 Clothing  Shoes  Accessories  Underwear

Brand Analytics

- Dynamics and distribution of brand queries:
 - ▶ in luxury-segment
 - ▶ in mainstream-segment
- Geography of brand interest
- Top popular brands: dynamics and change of interest

Brands' dynamics

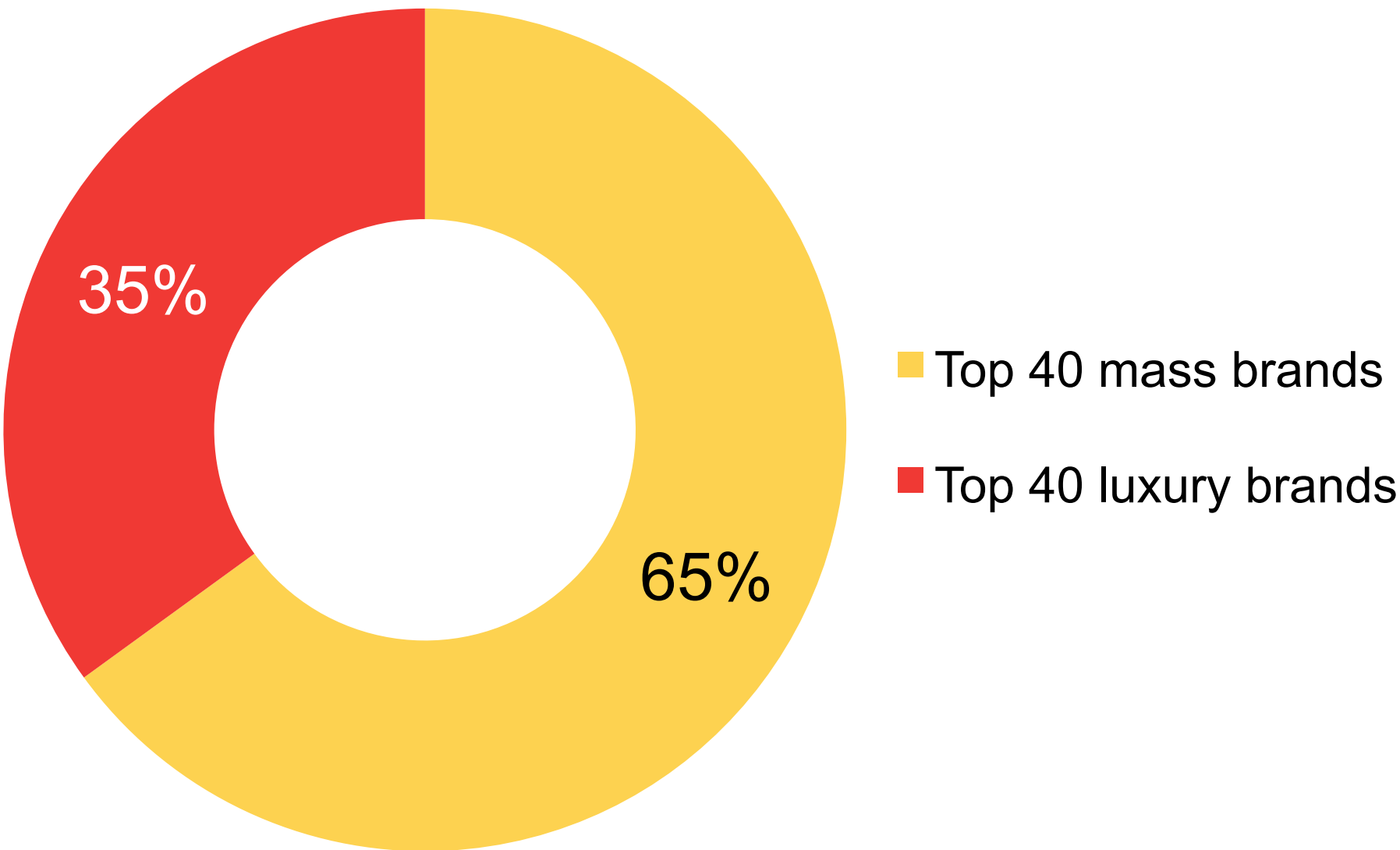


The generic queries are displayed on the right (additional) axis.

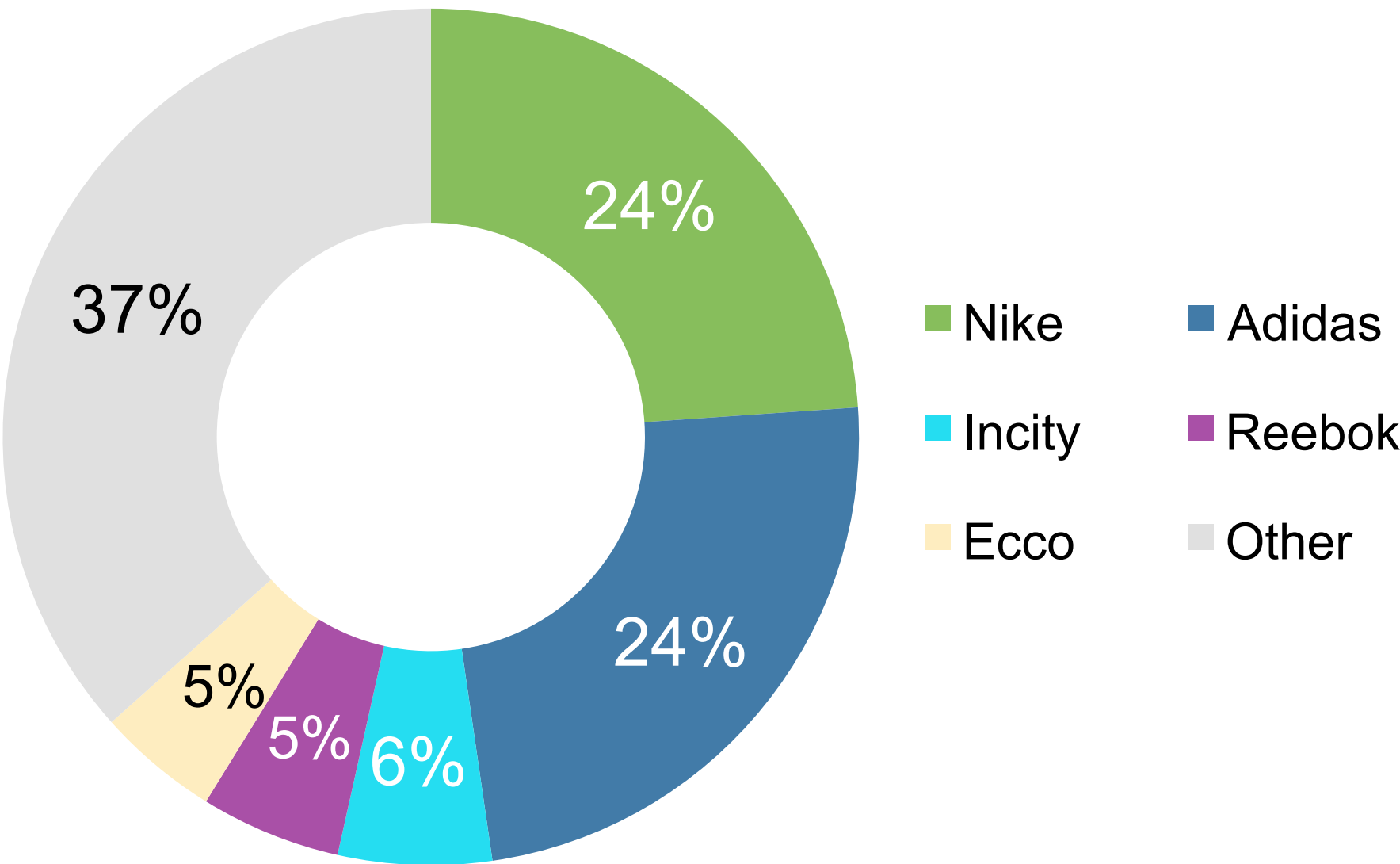
Dynamics of a brand query corresponds to the generic queries in the category. However, the interest towards luxury brands is higher in pre-new year period.

Brand interest distribution

Luxury vs Mainstream Brands



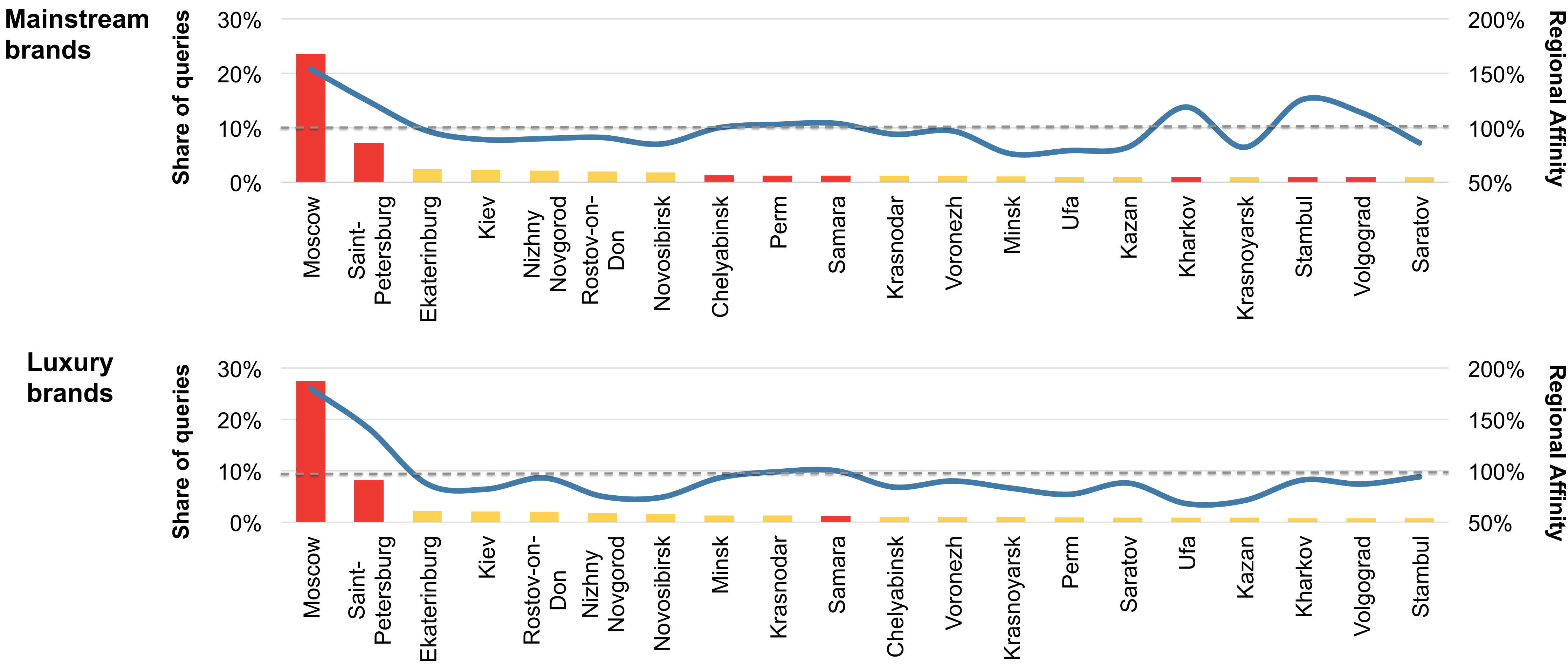
Top-5 Brands



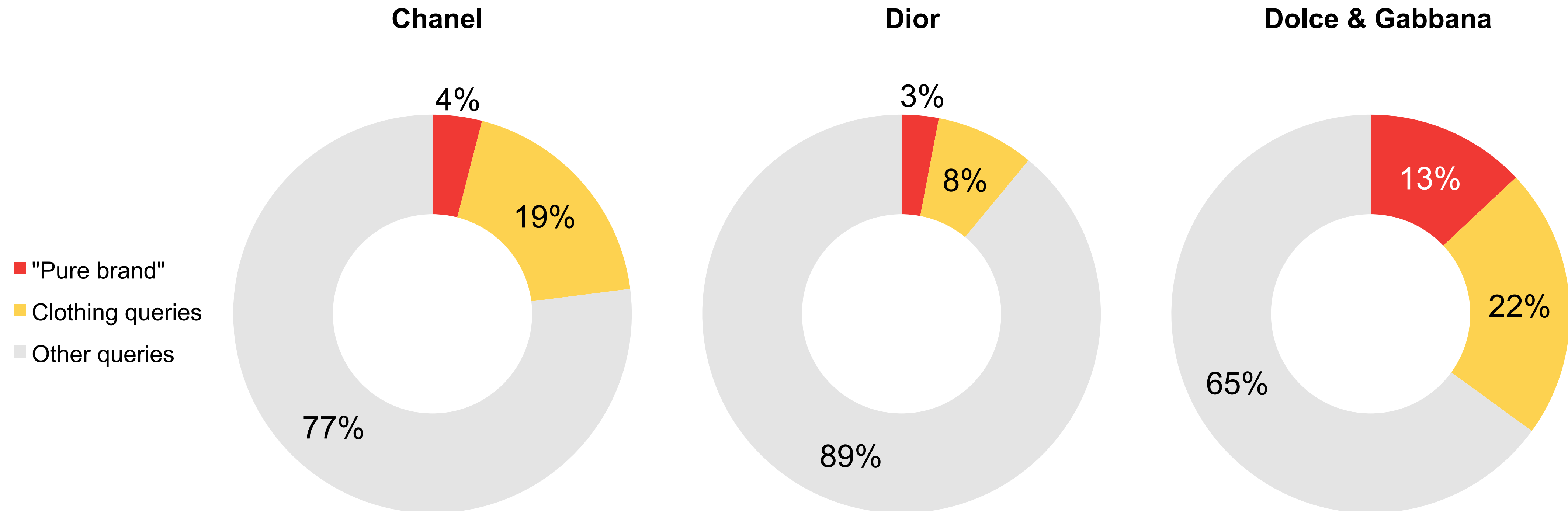
Interest in mainstream brands is almost 2 times higher than the interest towards luxury brands, according to the Top-40 of both groups.

First and second places divided between sports brand Adidas and Nike, their total share making up almost 50% of Mass Brands interest.

Geography of brand interest



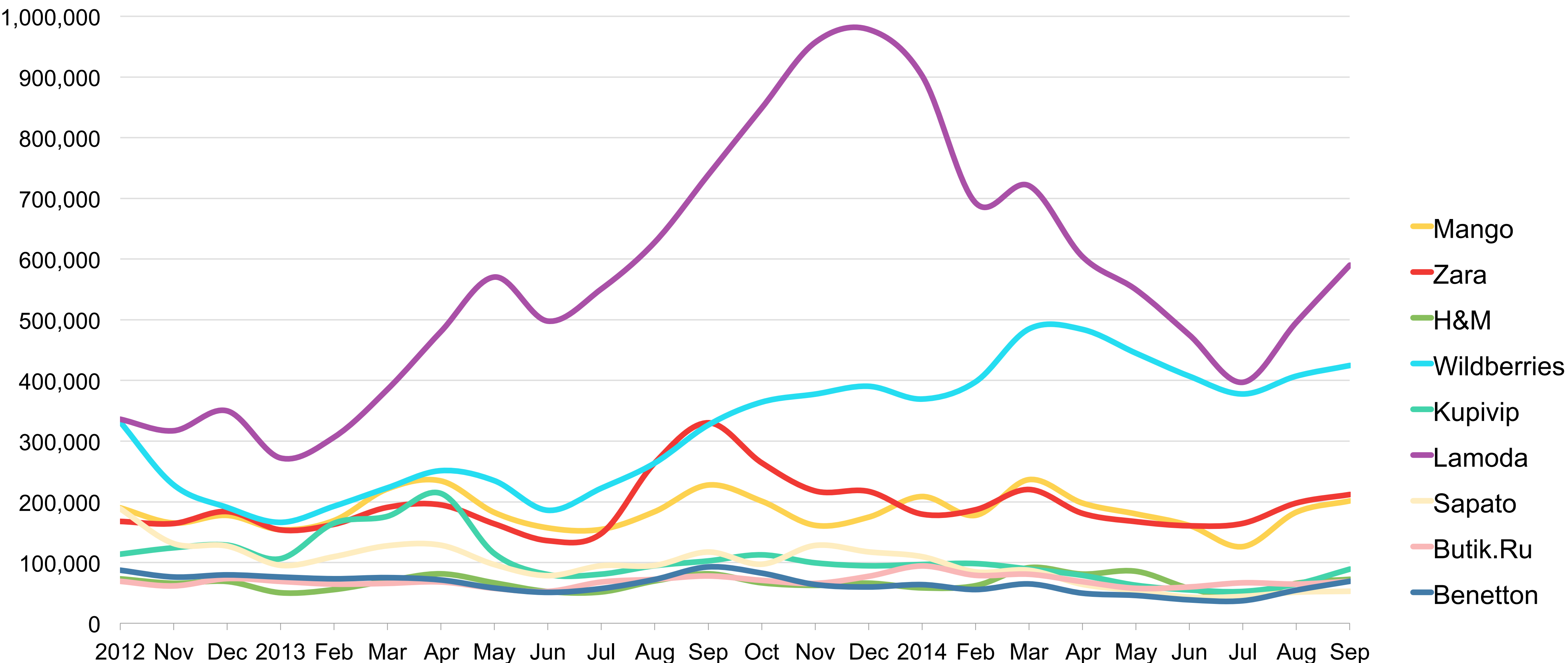
Top-3 popular luxury brands



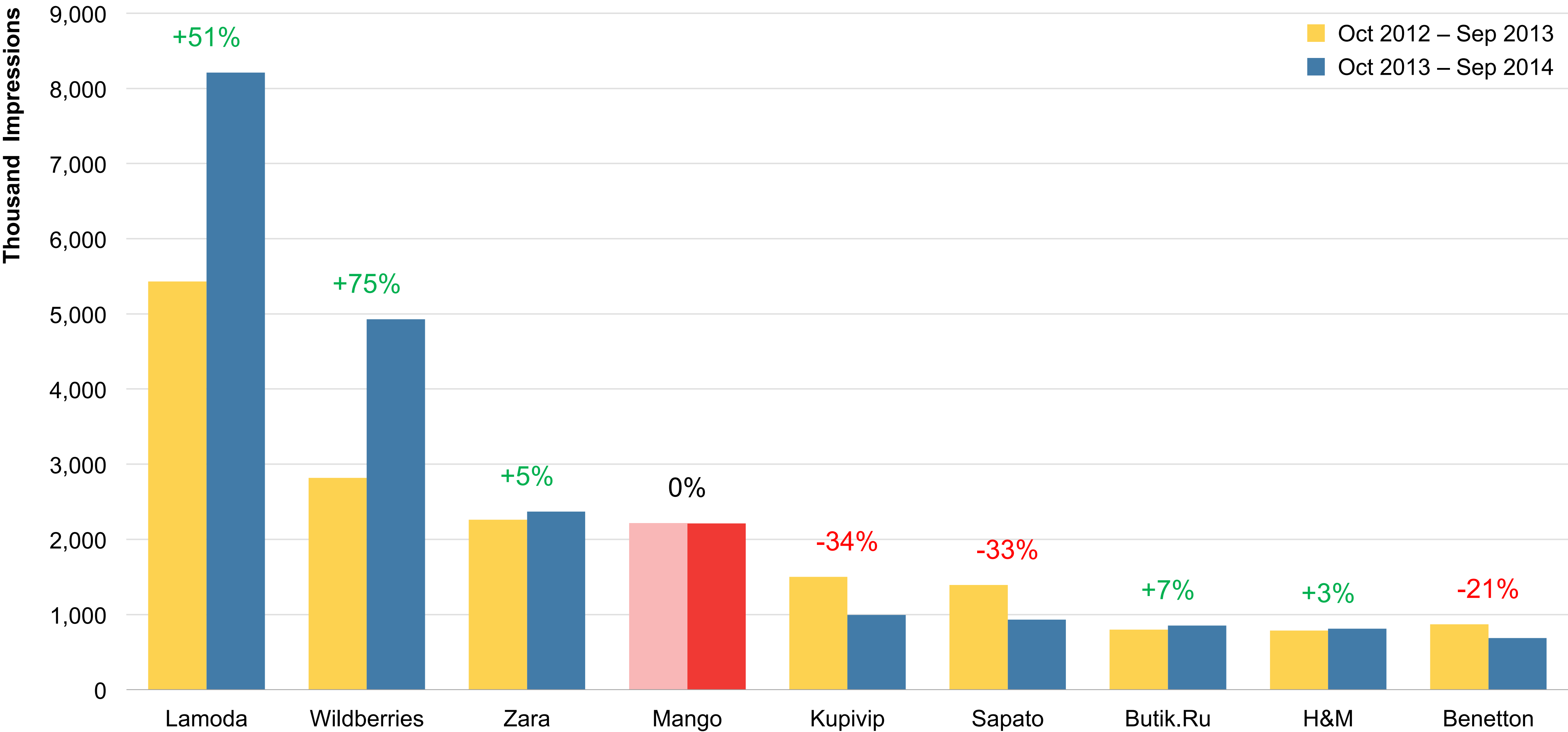
Interest in luxury brands related mainly to interest towards perfumery and cosmetics, produced by these brands.

Further, there is interest in luxury brands in general and interest in luxury brands' Clothing, Shoes, Accessories and Underwear products for comparison.

Brand query dynamics



Change of Interest in brands

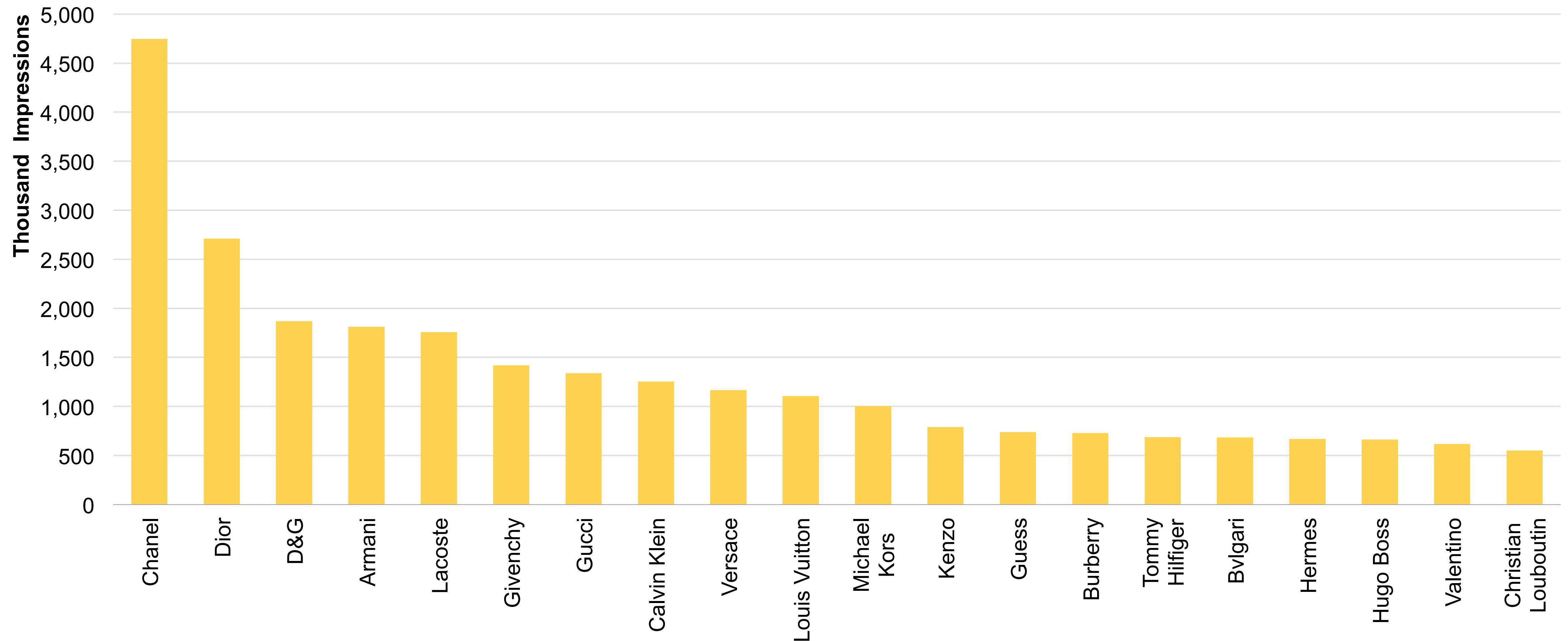


Luxury Brands

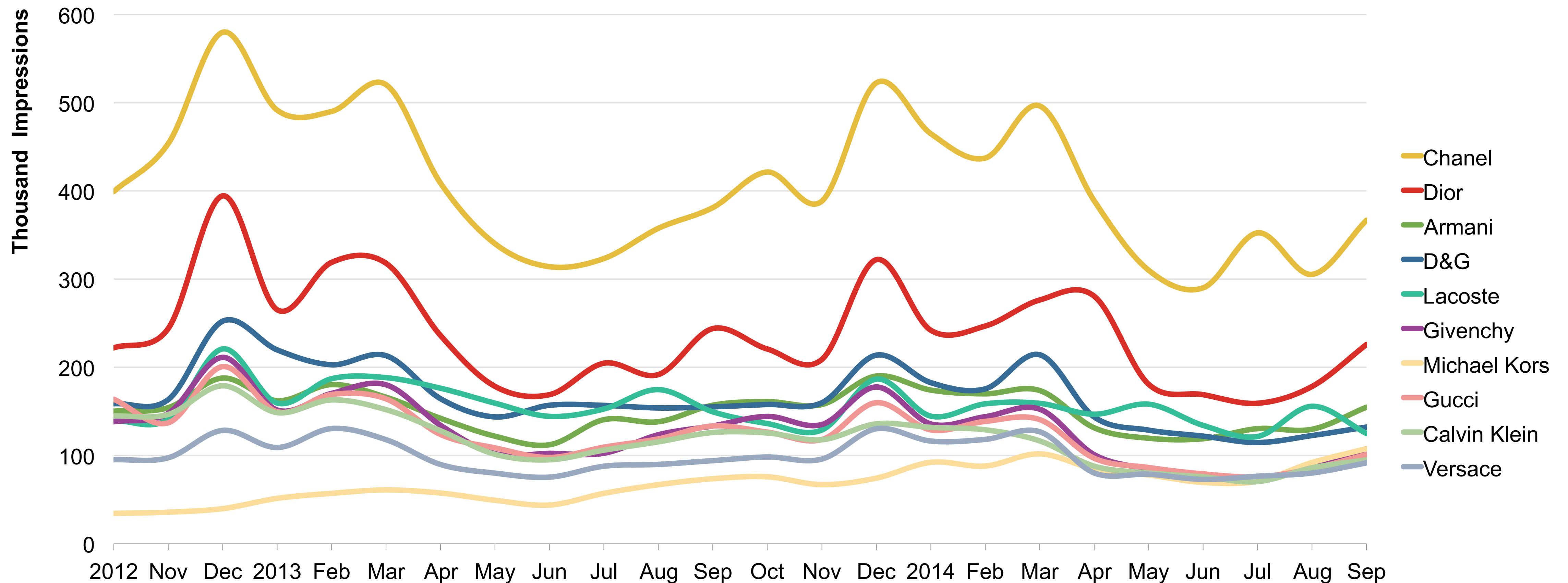
Interest towards luxury-brands in general

Top-20 popular luxury brands

(based on statistics for the last 12 months)

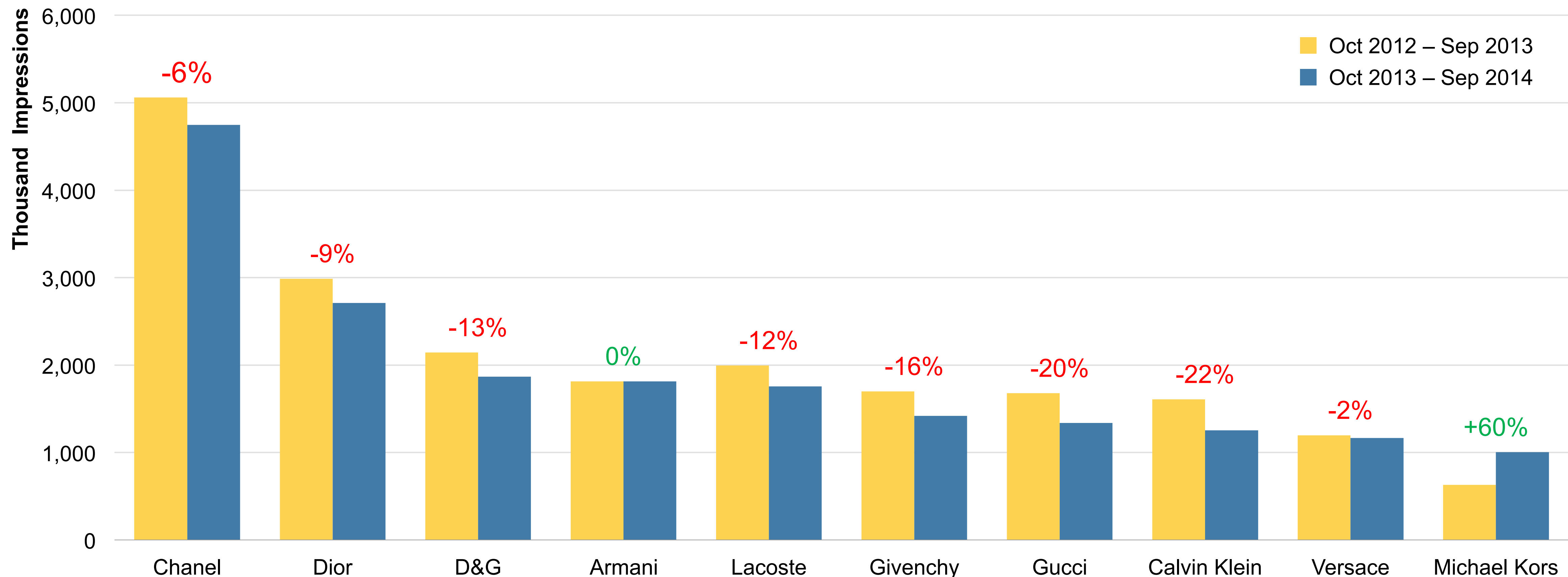


Query dynamics of Top-10 luxury brands



The interest to the brand Chanel is kept at a high level throughout the year.
The brand Dior ranked second and Dolce&Gabbana ranked third.

Change of interest to luxury brands

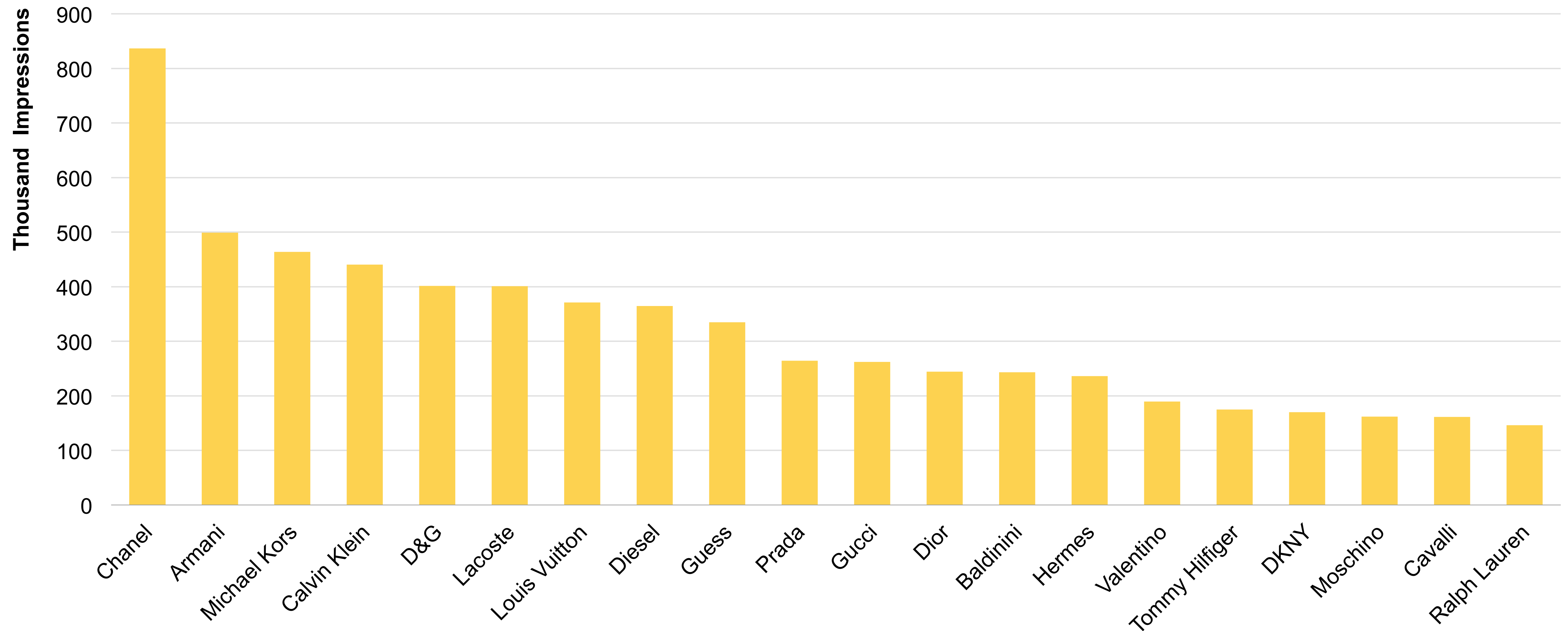


Luxury Brands

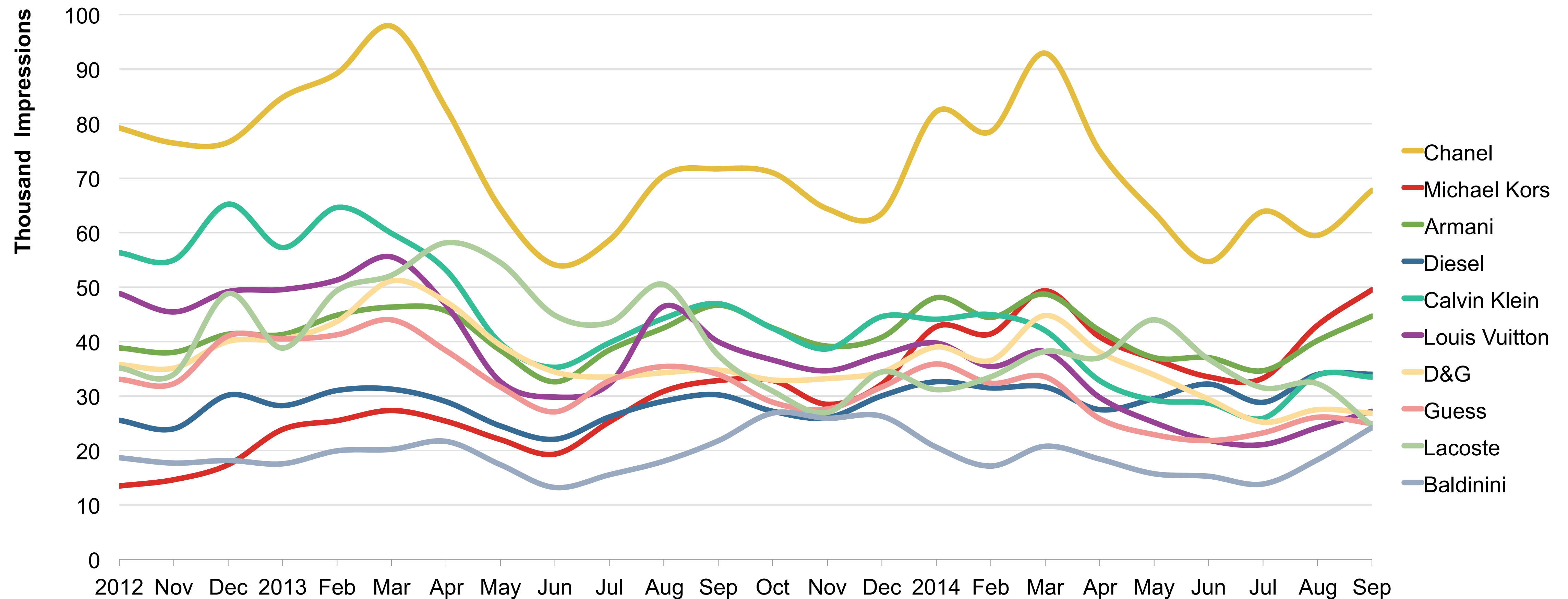
Interest towards luxury-brands' products
(Clothing, Shoes, Accessories and Underwear)

Top-20 popular luxury brands (Clothing)

(based on statistics for the last 12 months)

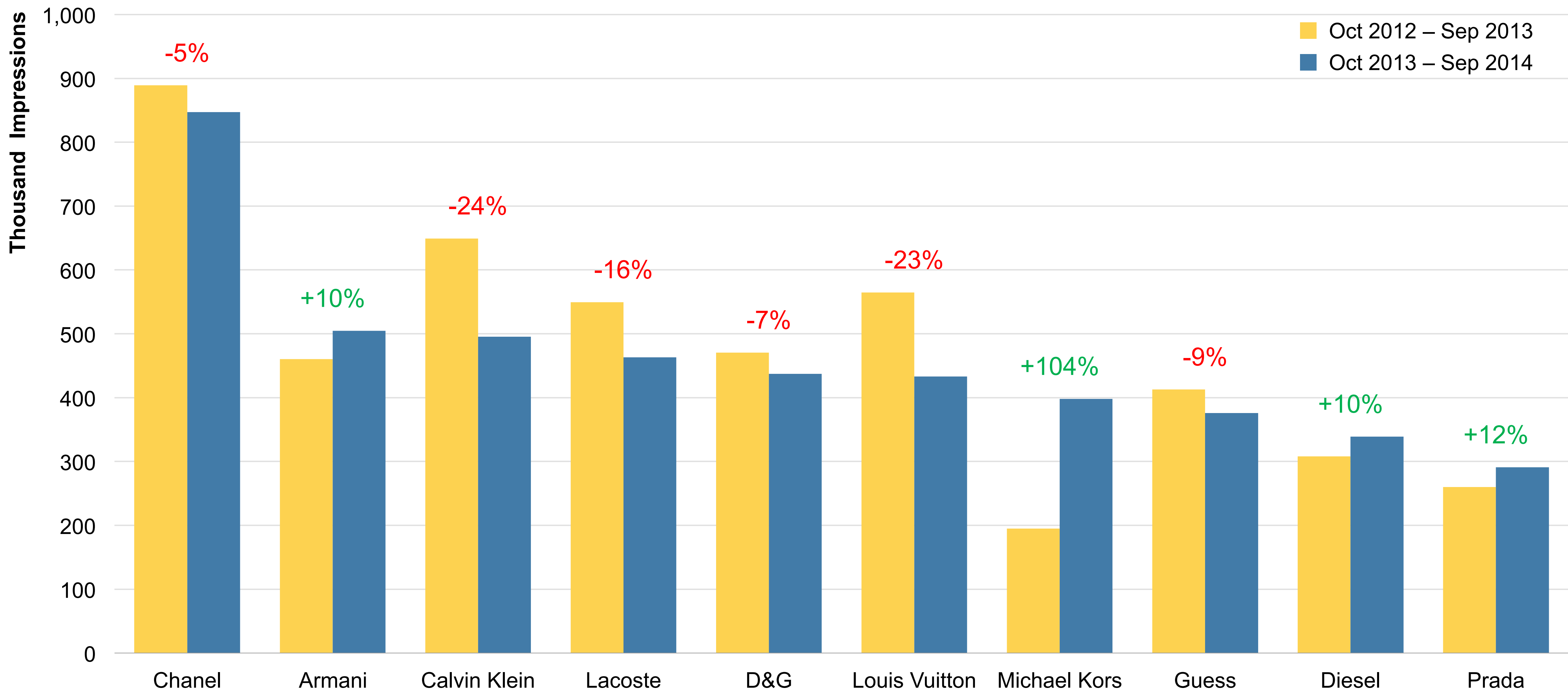


Query dynamics of Top-10 luxury brands (Clothing)



The interest in Chanel's clothes and shoes is kept at a high level throughout the year. In 2014, 3rd place was divided between the brands Armani and Michael Kors.

Change of interest to luxury brands (Clothing)

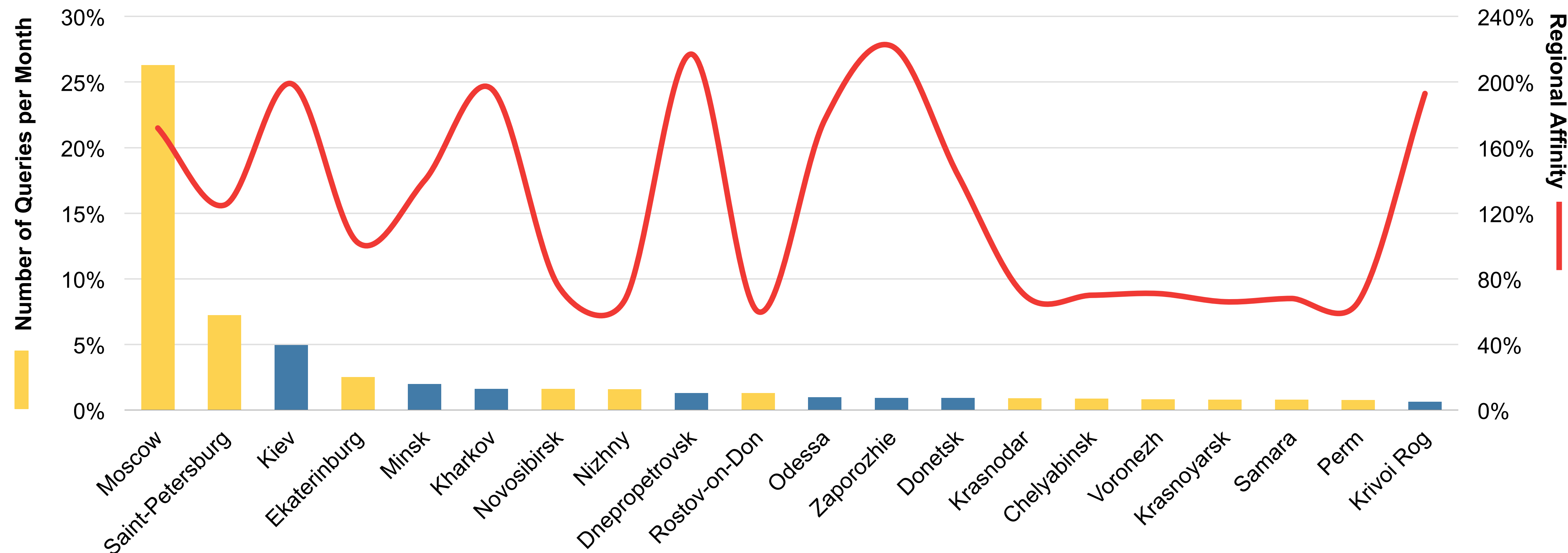


A yellow chevron graphic pointing to the right, containing the text.

Regional User Interest by Segment

Regional popularity: Clothes

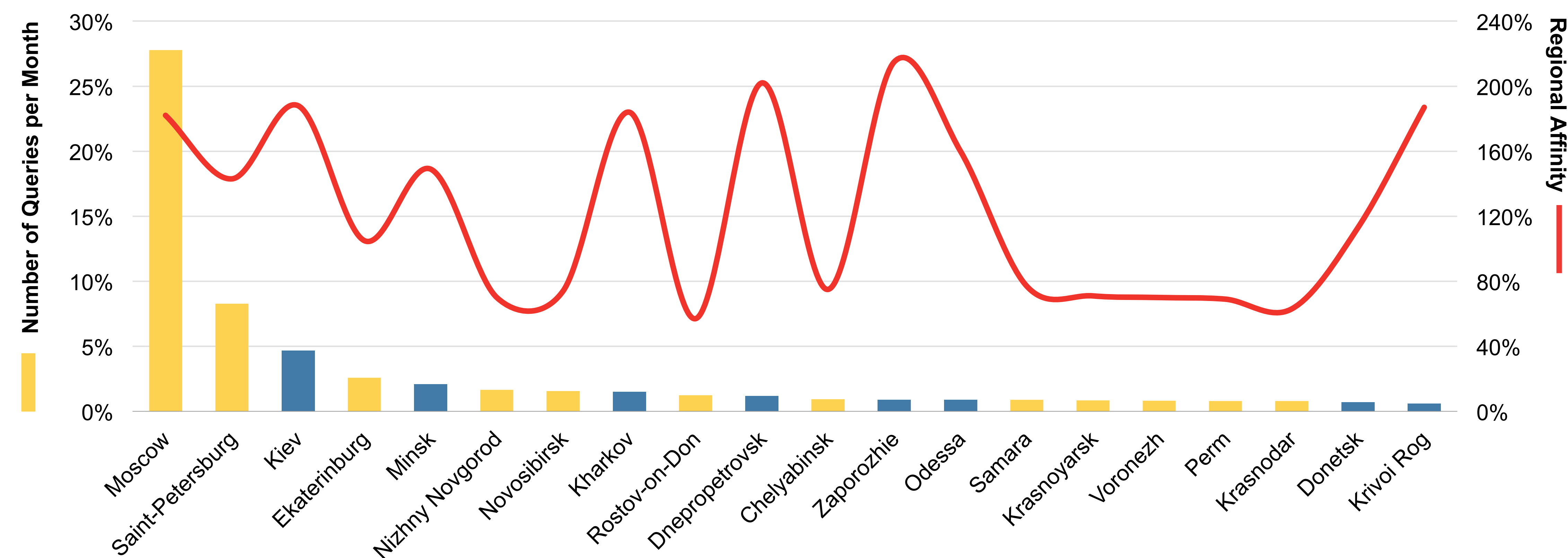
Top-20 cities with the biggest number of queries for buying clothes



The most regional popularity is observed in the capital cities of Russia and CIS and also in Ukraineian cities.

Regional popularity: Accessories

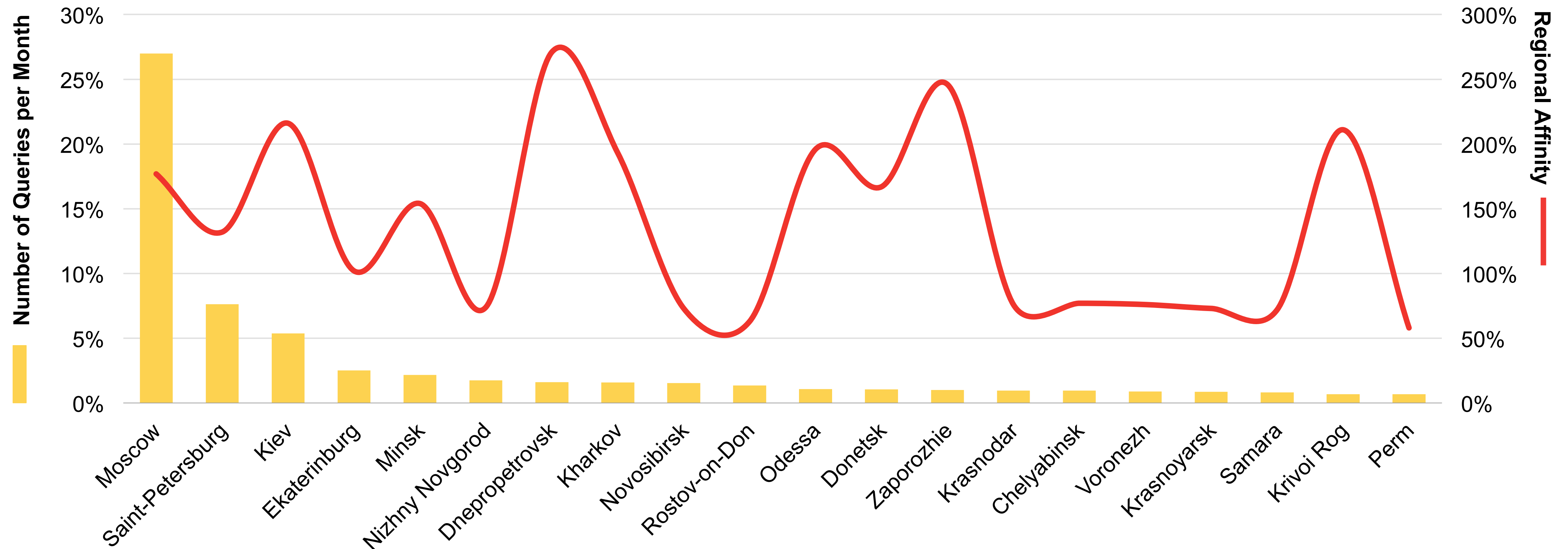
Top-20 cities with the biggest number of queries for bags, hats and other accessories



In the Accessories segment, the greatest interest is in Moscow.

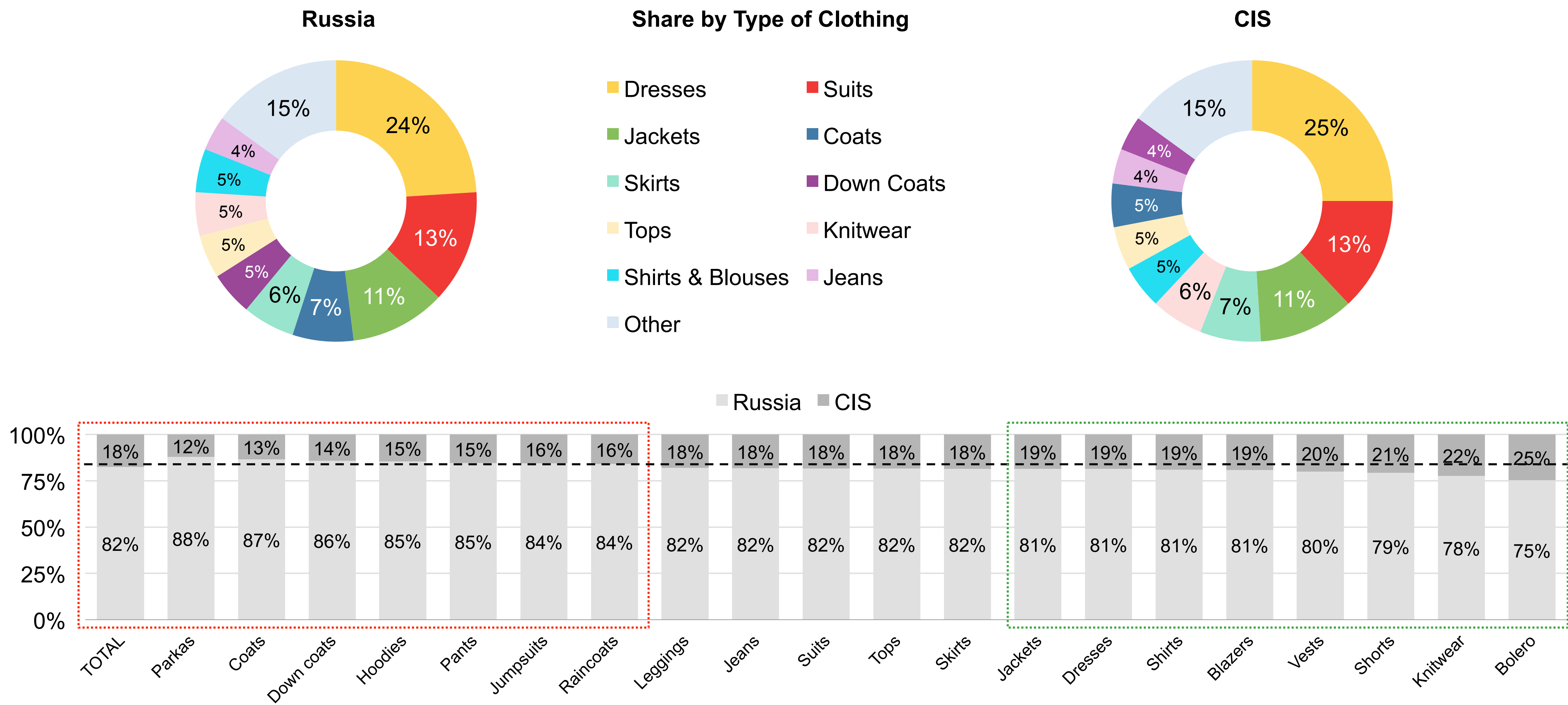
Regional popularity: Underwear

Top-20 cities with the biggest number of queries for underwear



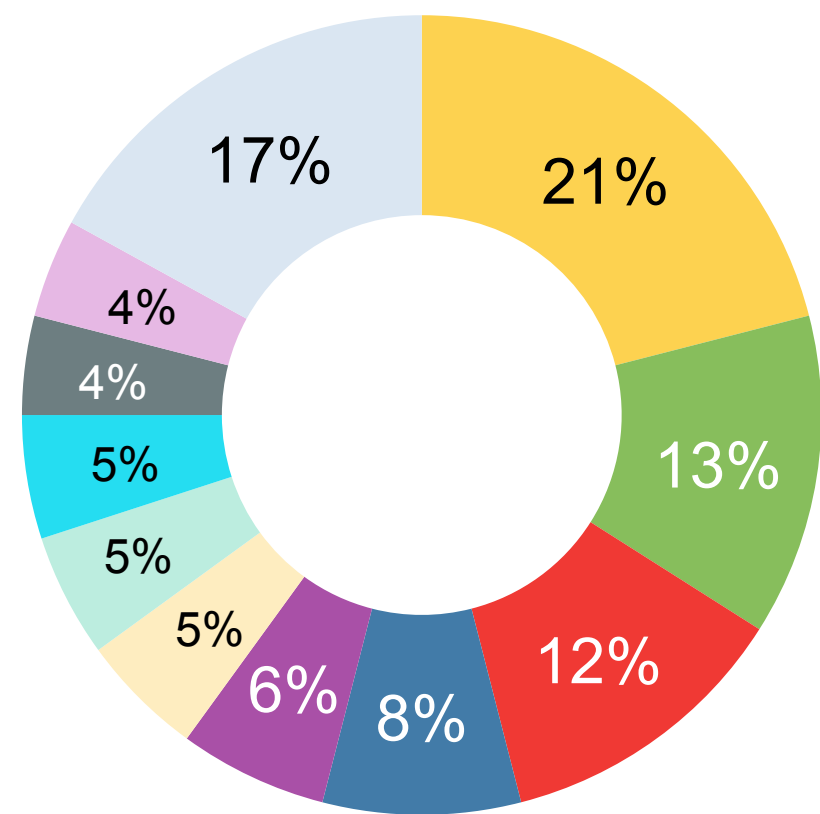
In the Underwear and Swimwear segment, the greatest interest (27%) is in Moscow.

Russia vs. CIS: Clothing



Russia vs. Capitals: Clothing

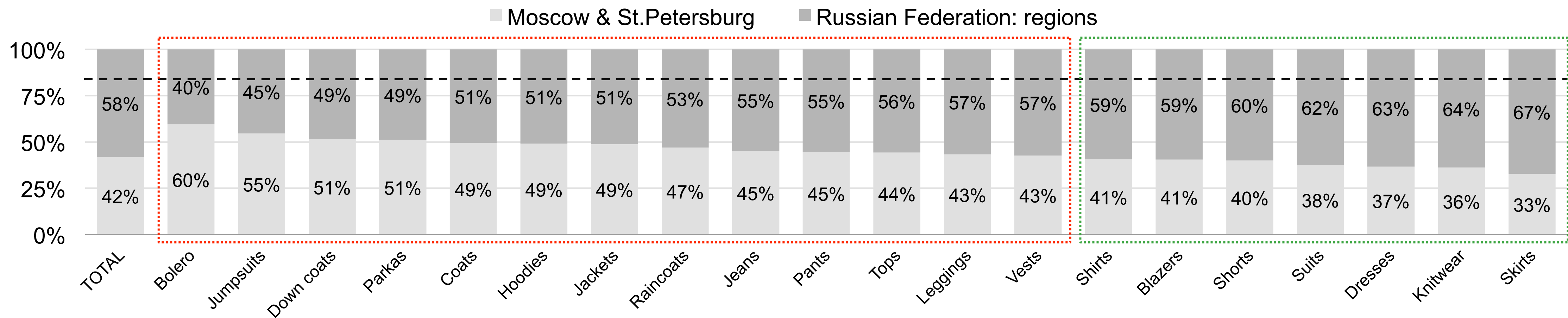
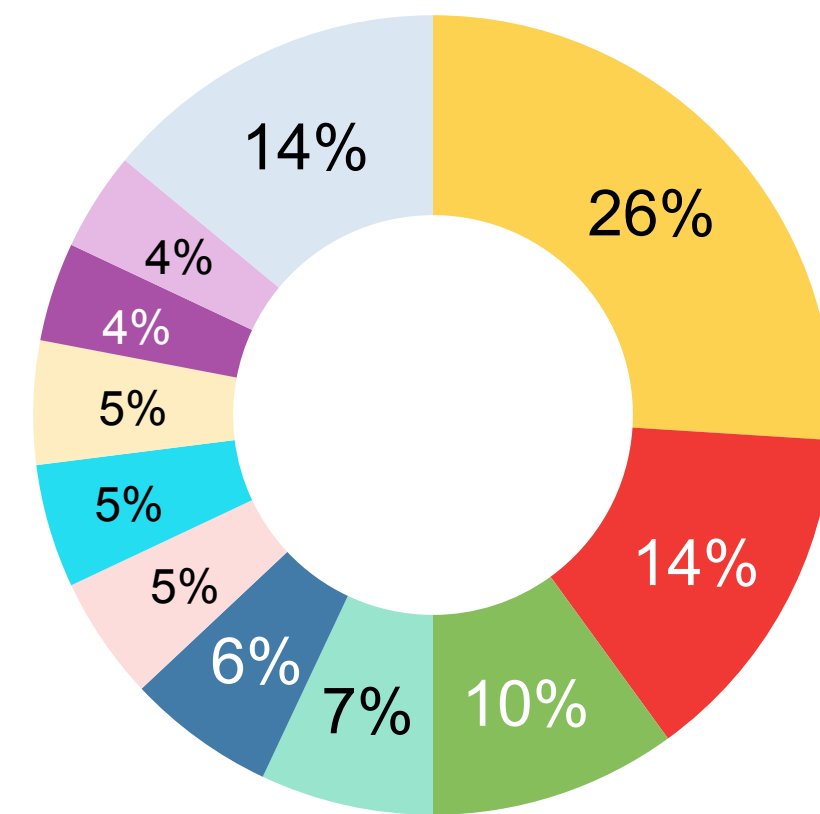
Moscow, St. Petersburg (with regions)



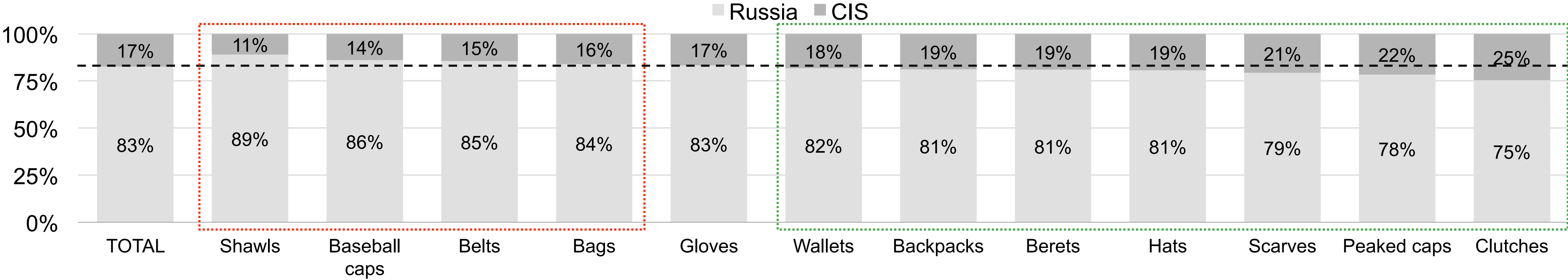
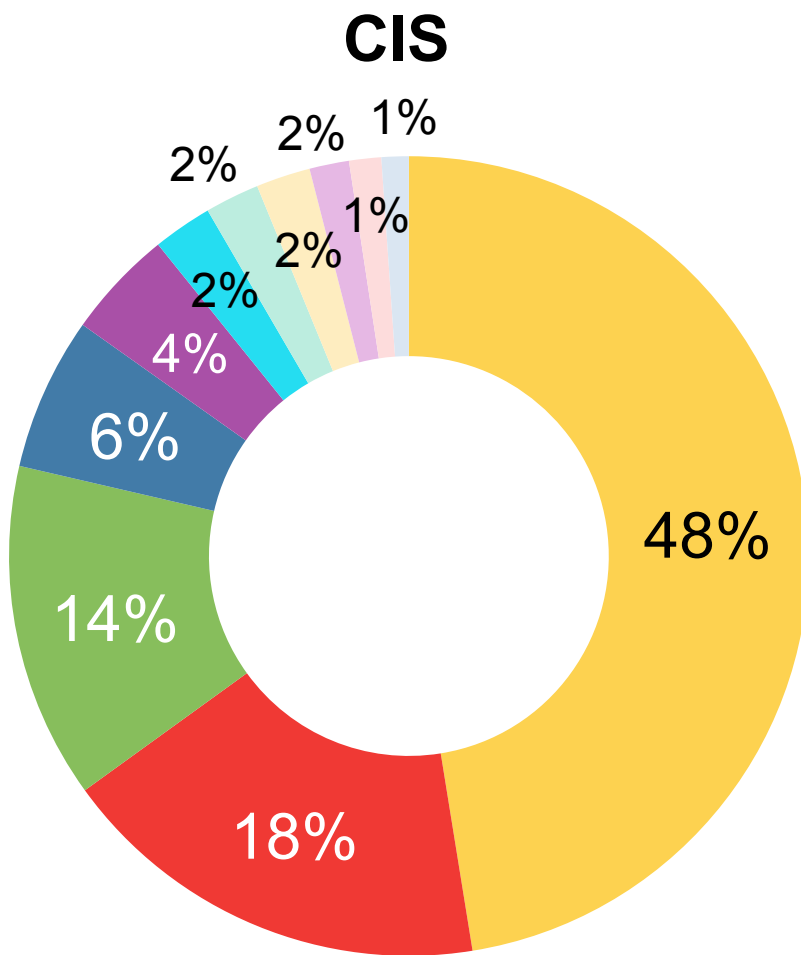
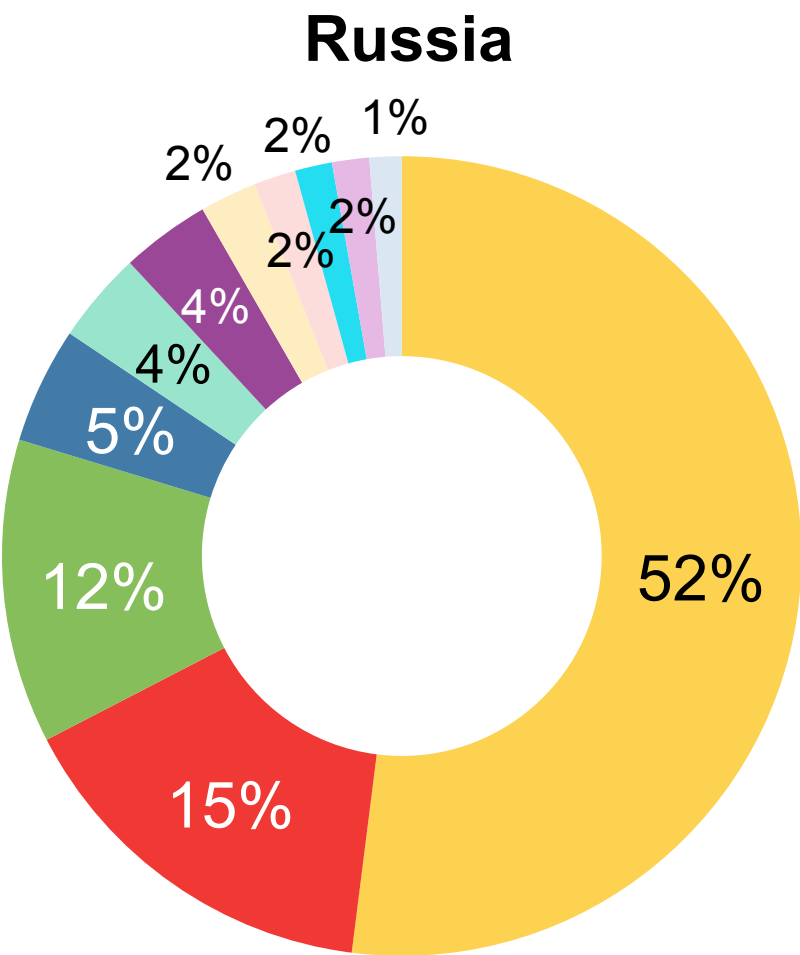
Share by Type of Clothing



Russian Federation: regions

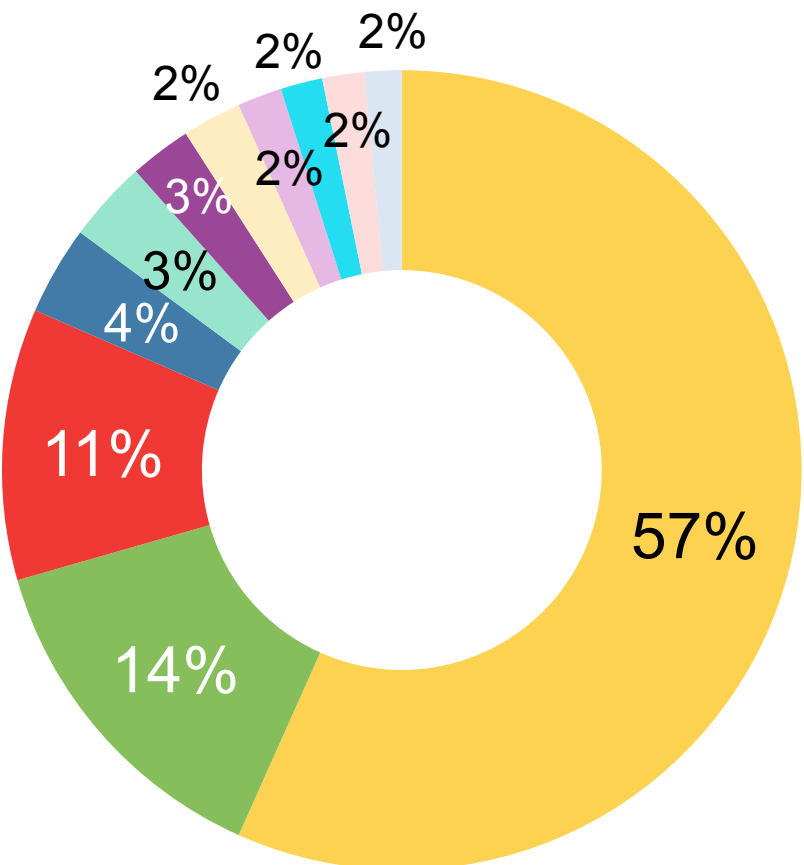


Russia vs. CIS: Accessories



Russia vs. Capitals: Accessories

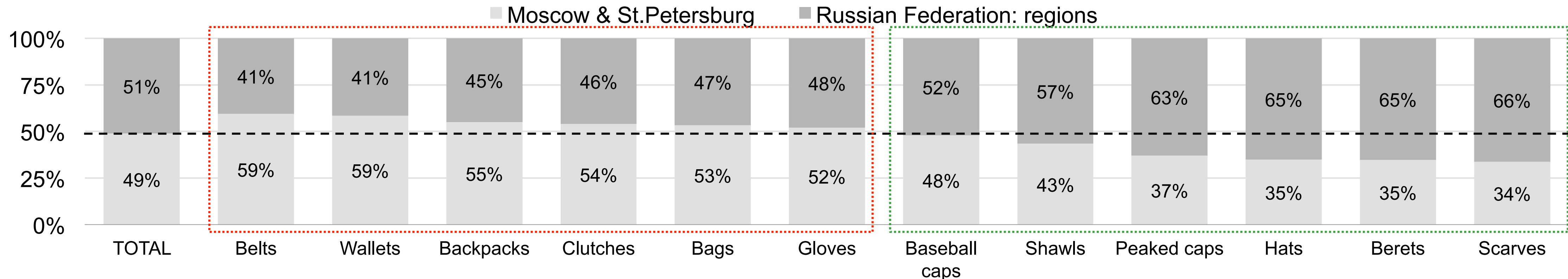
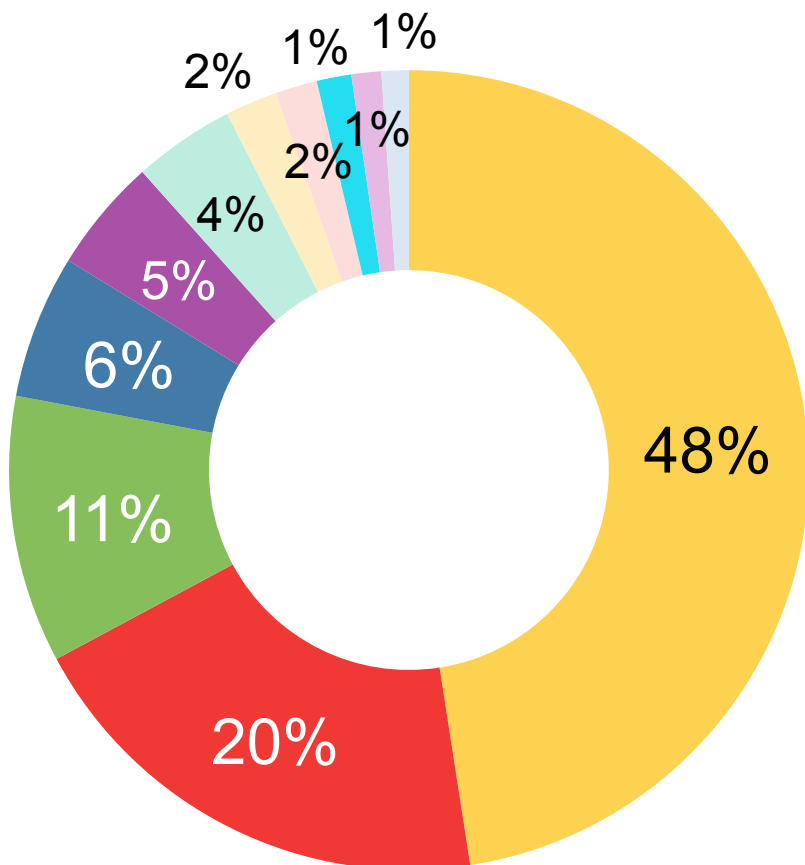
Moscow, St. Petersburg (with regions)



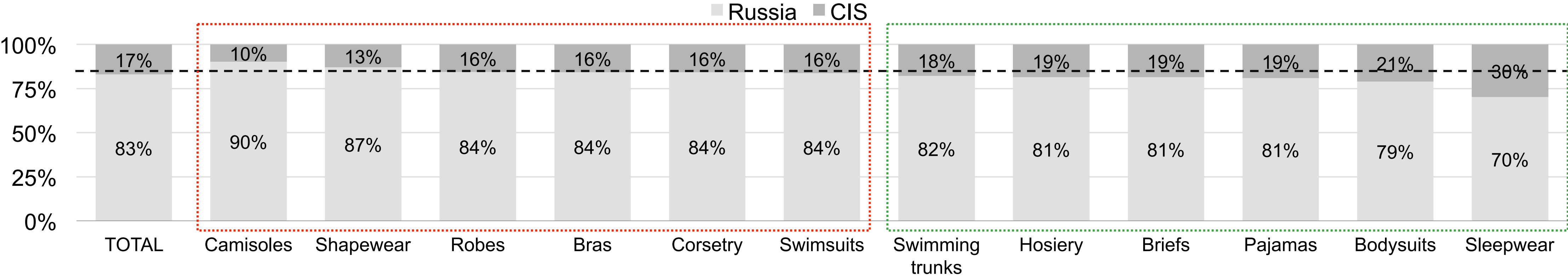
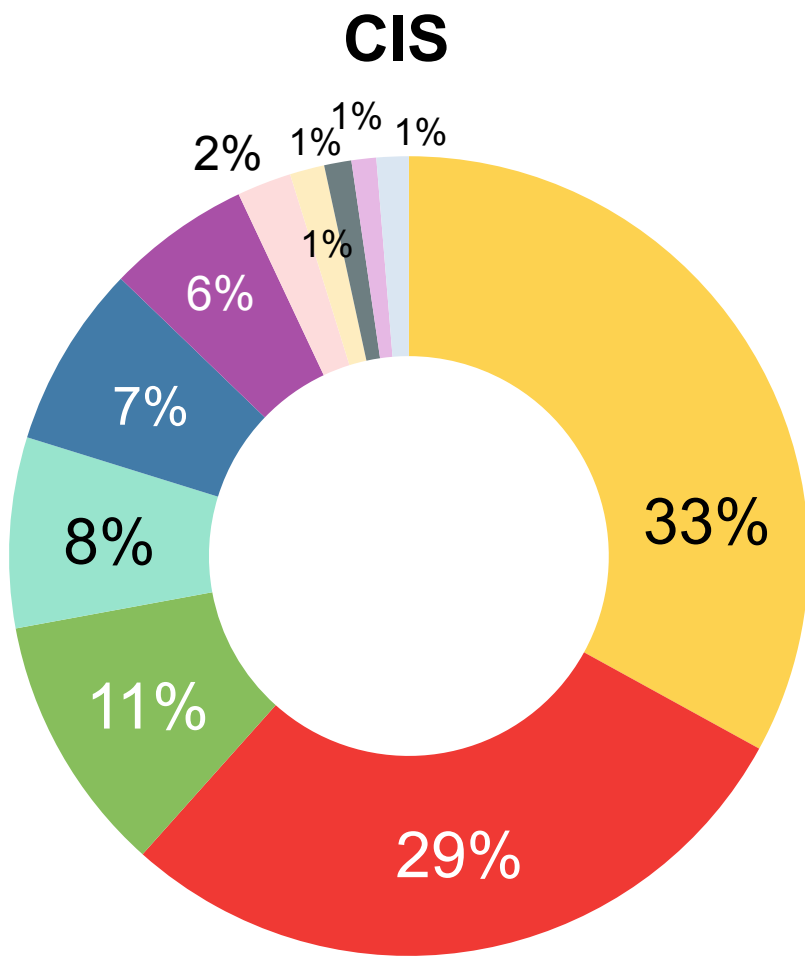
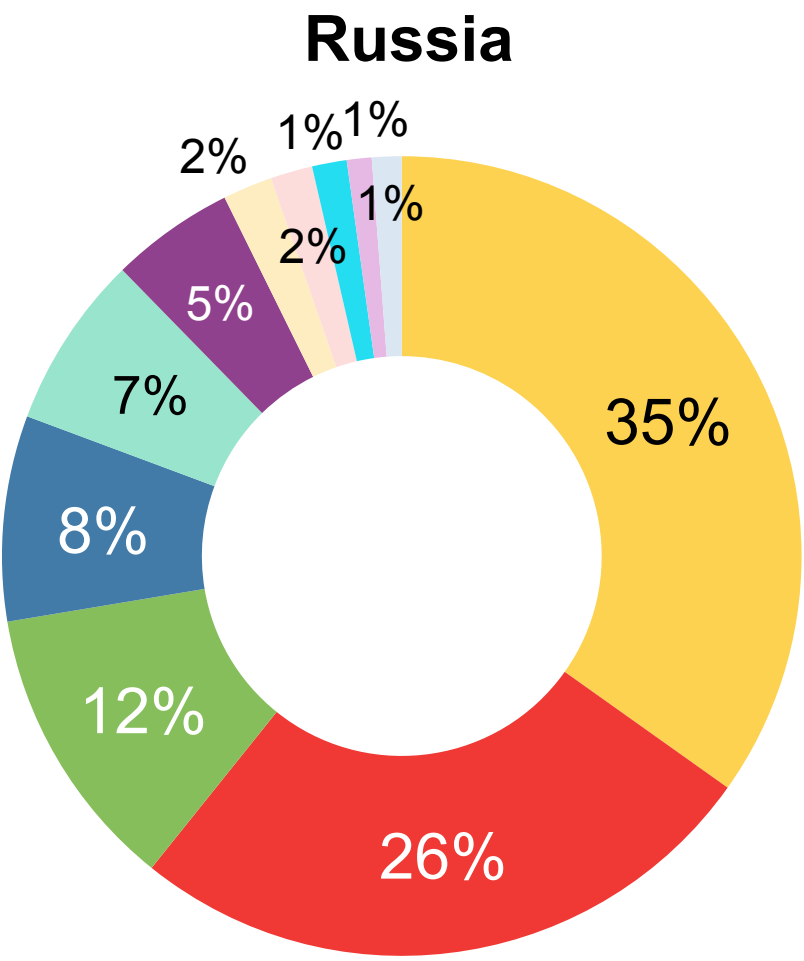
Share by Type of Clothing

- Bags
- Backpacks
- Shawls
- Gloves
- Clutches
- Other
- Hats
- Peaked Caps
- Scarves
- Baseball Caps
- Wallets

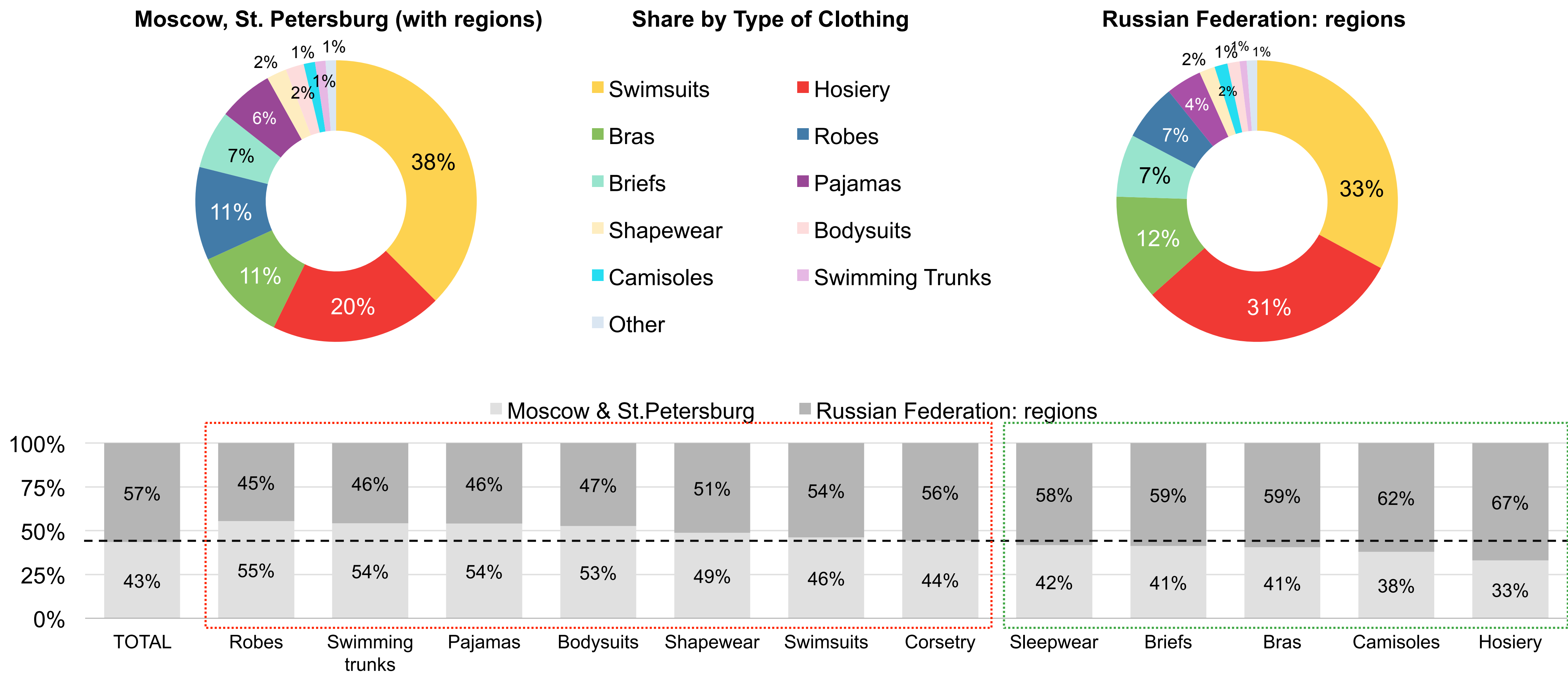
Russian Federation: regions



Russia vs. CIS: Underwear



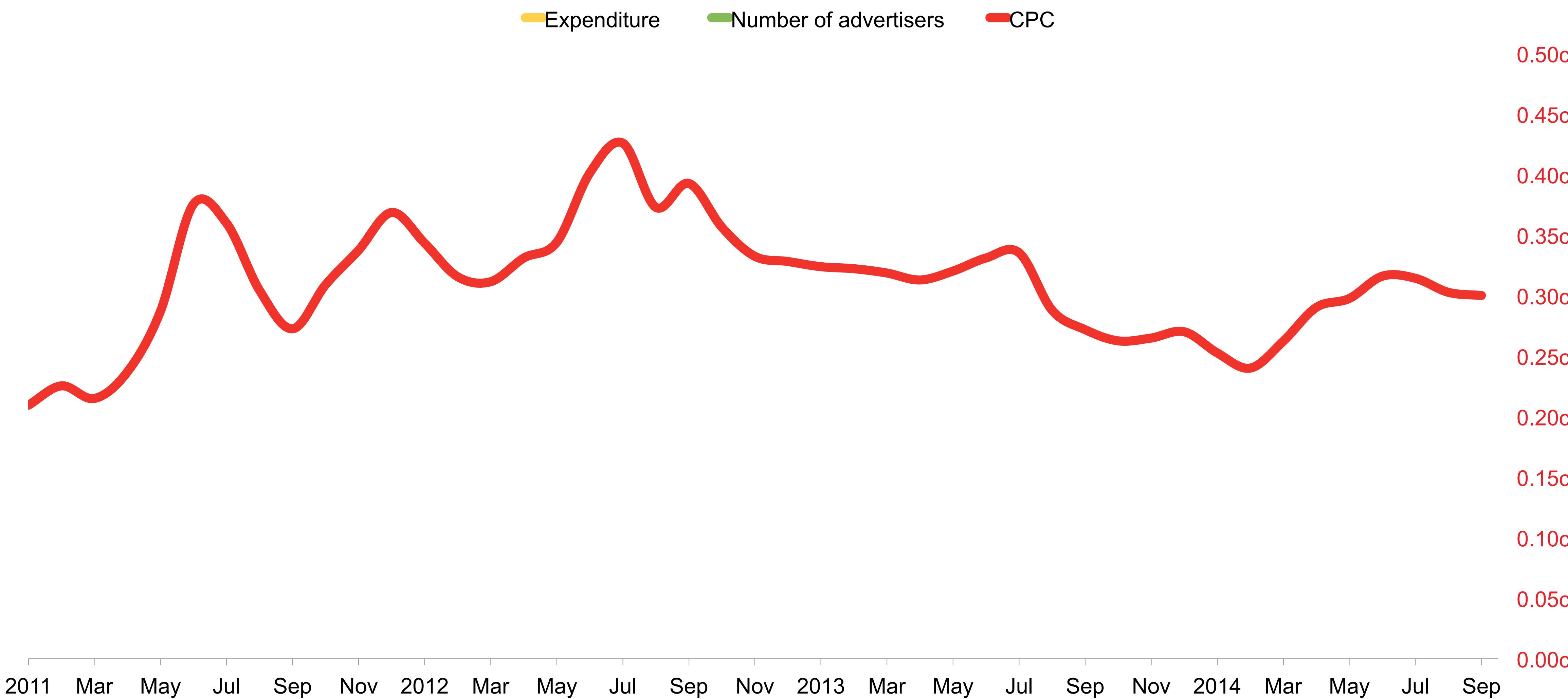
Russia vs. Capitals: Underwear



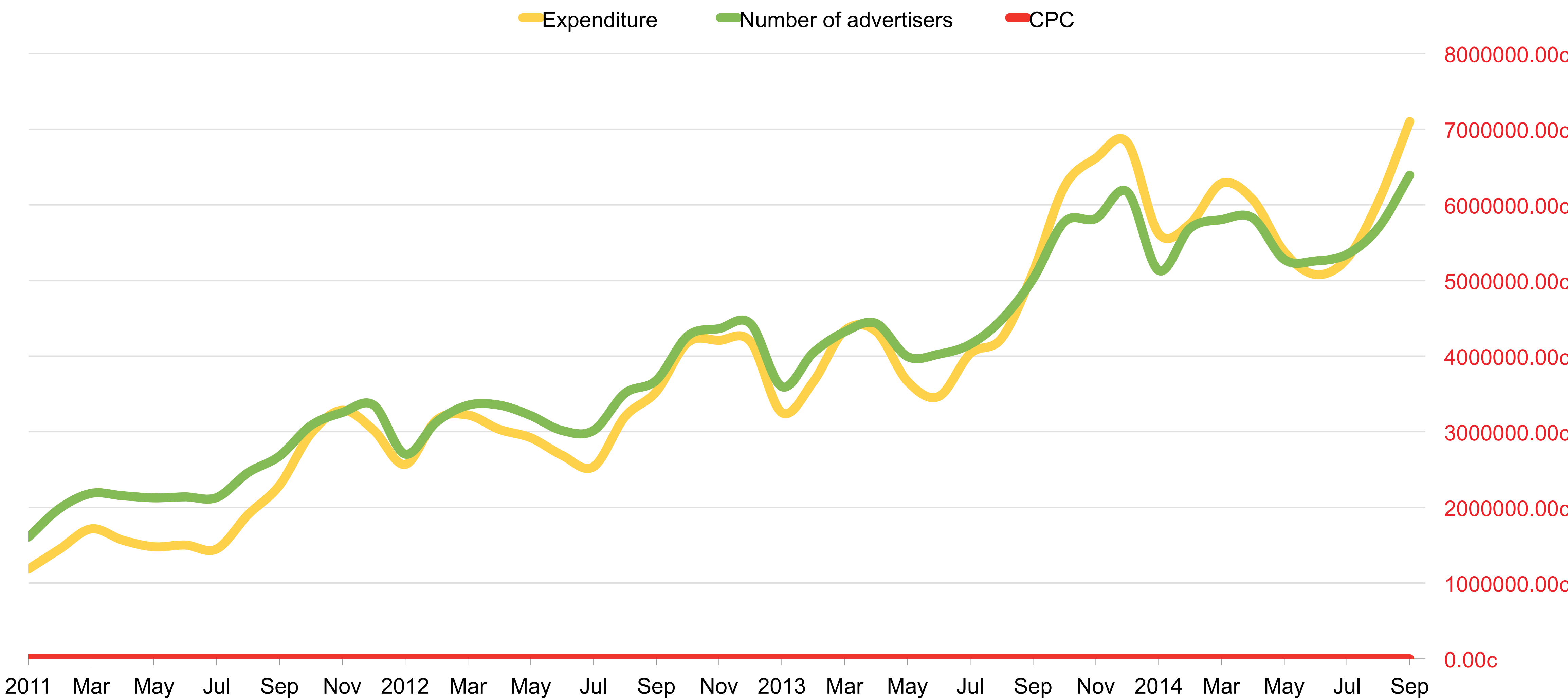
Competitive Landscape

Clothing

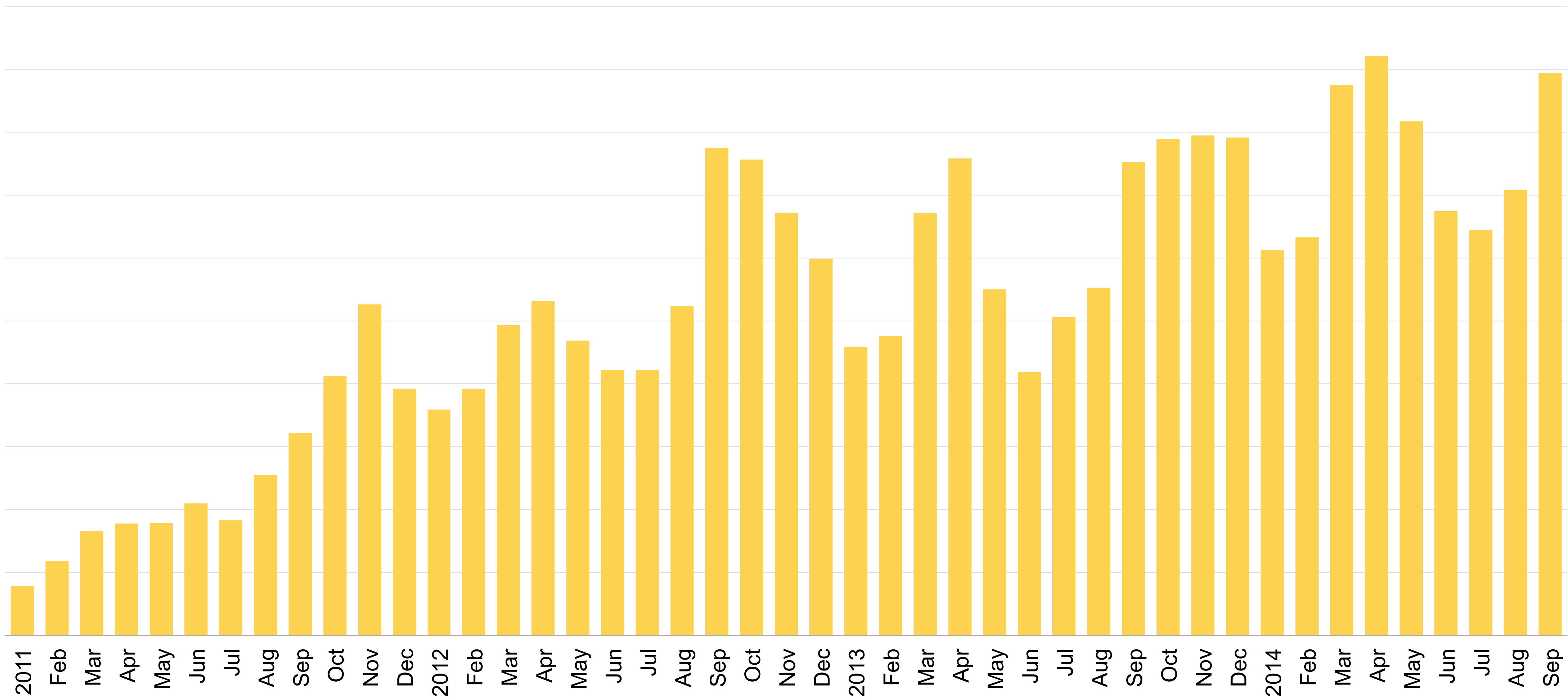
Segment dynamics



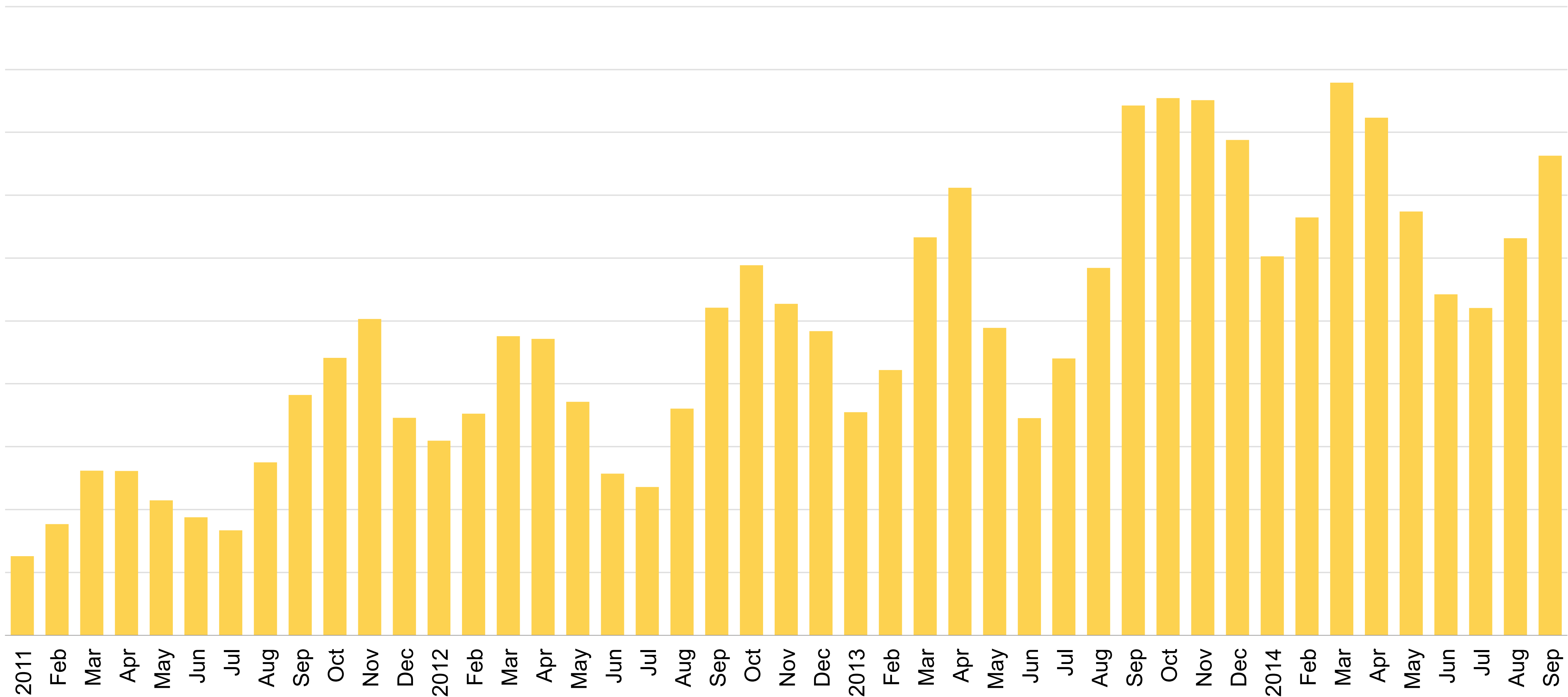
Segment dynamics



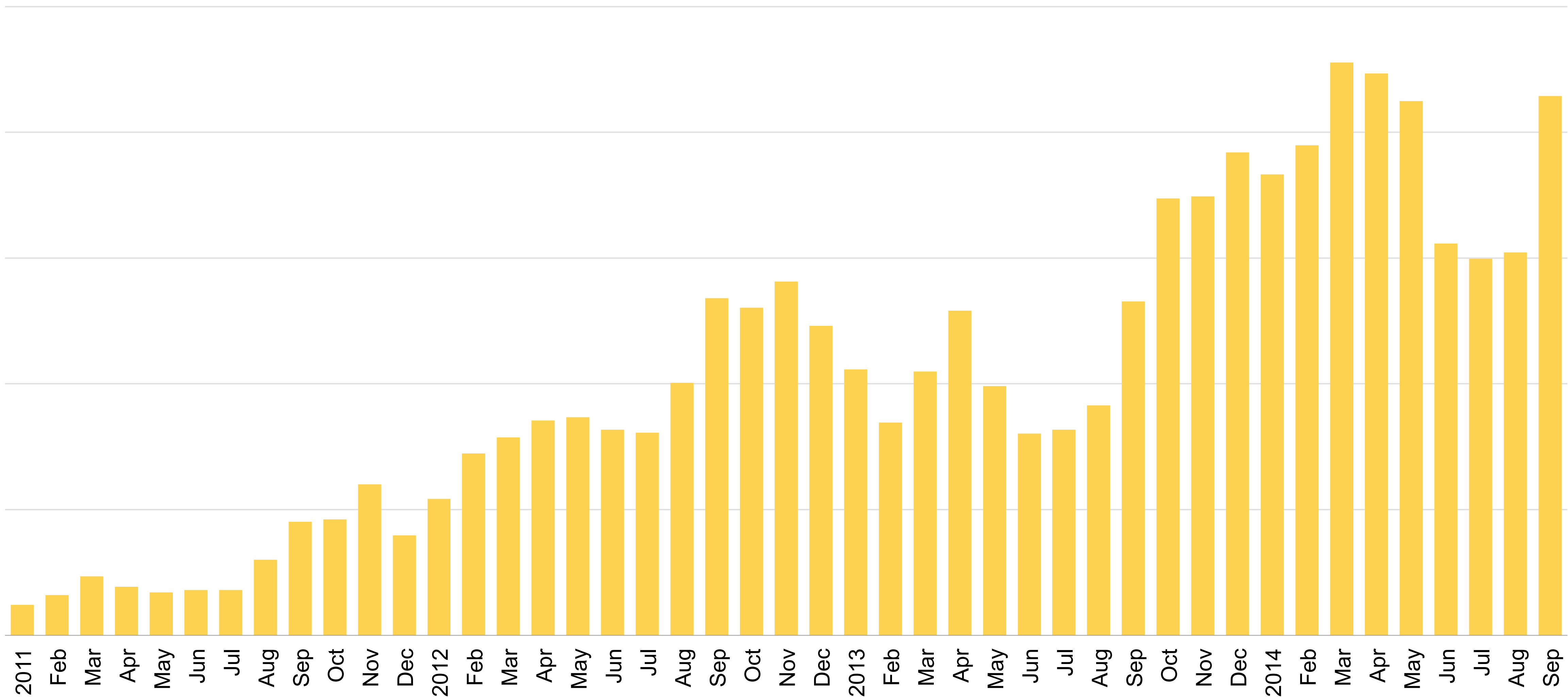
Expenditure dynamics



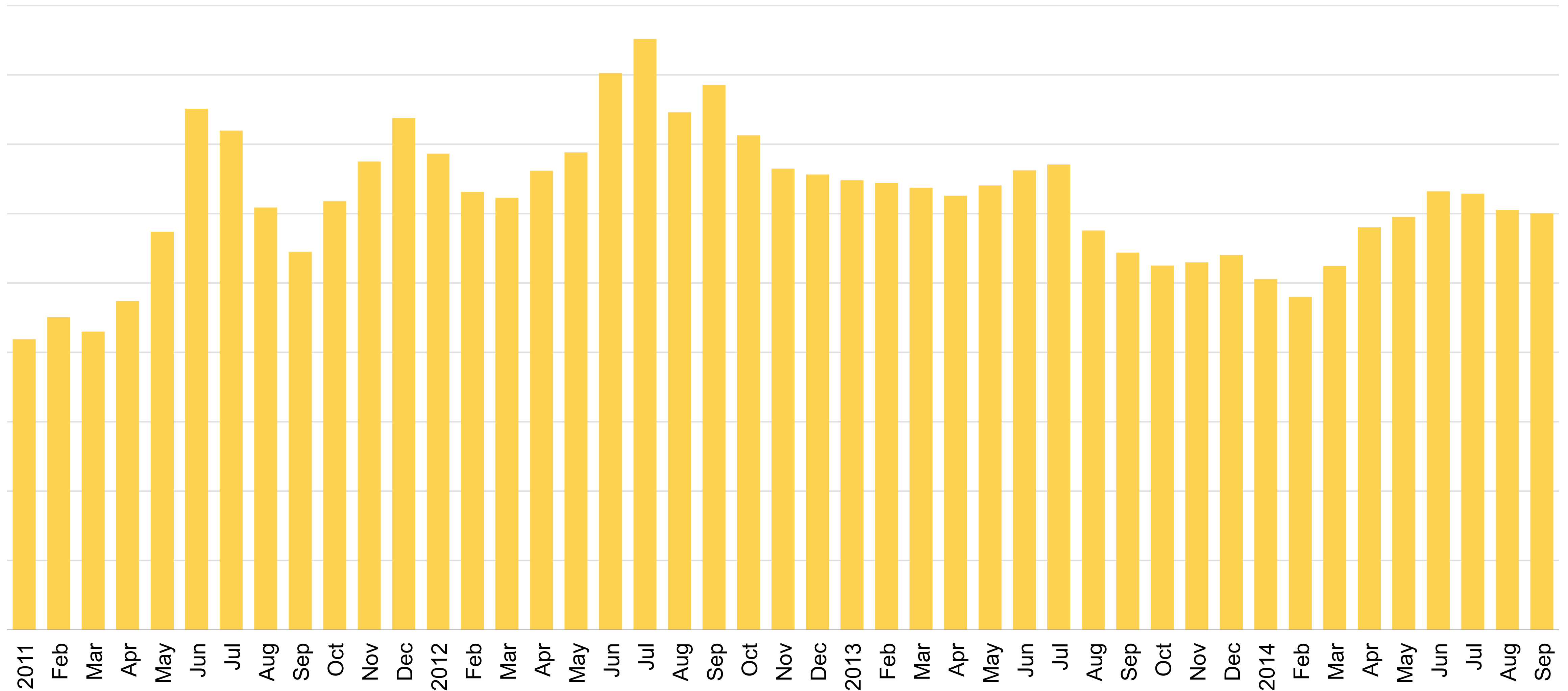
Click dynamics – Direct.Search



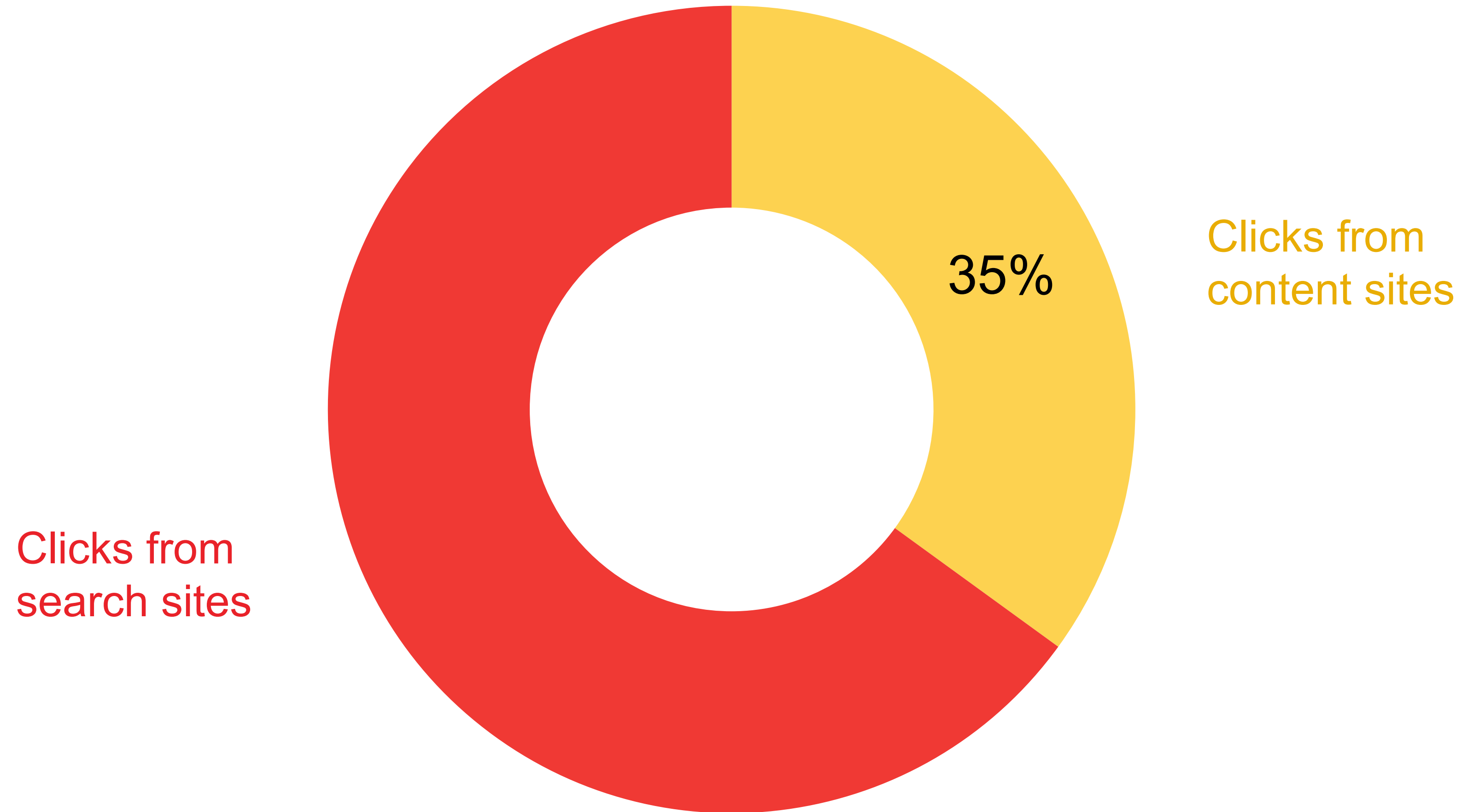
Click dynamics – Content sites



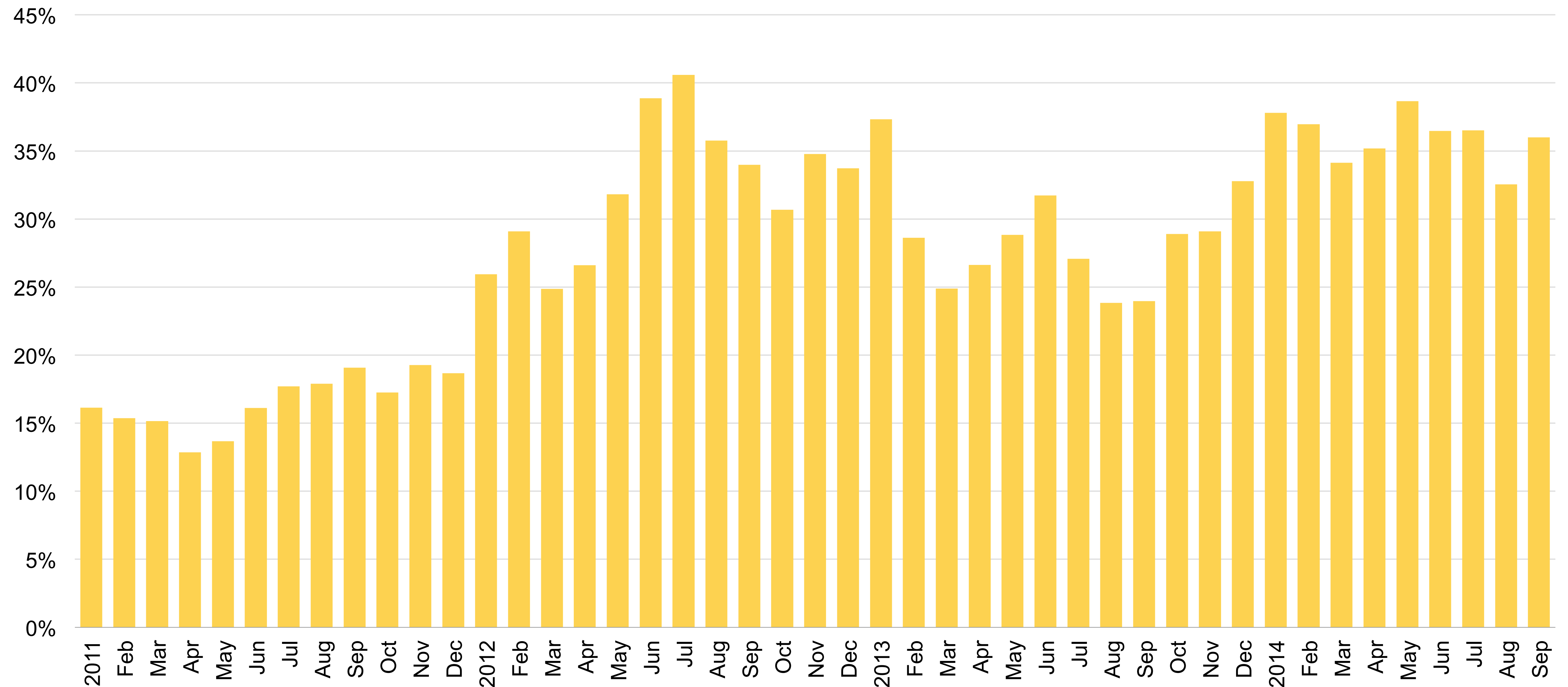
Average CPC



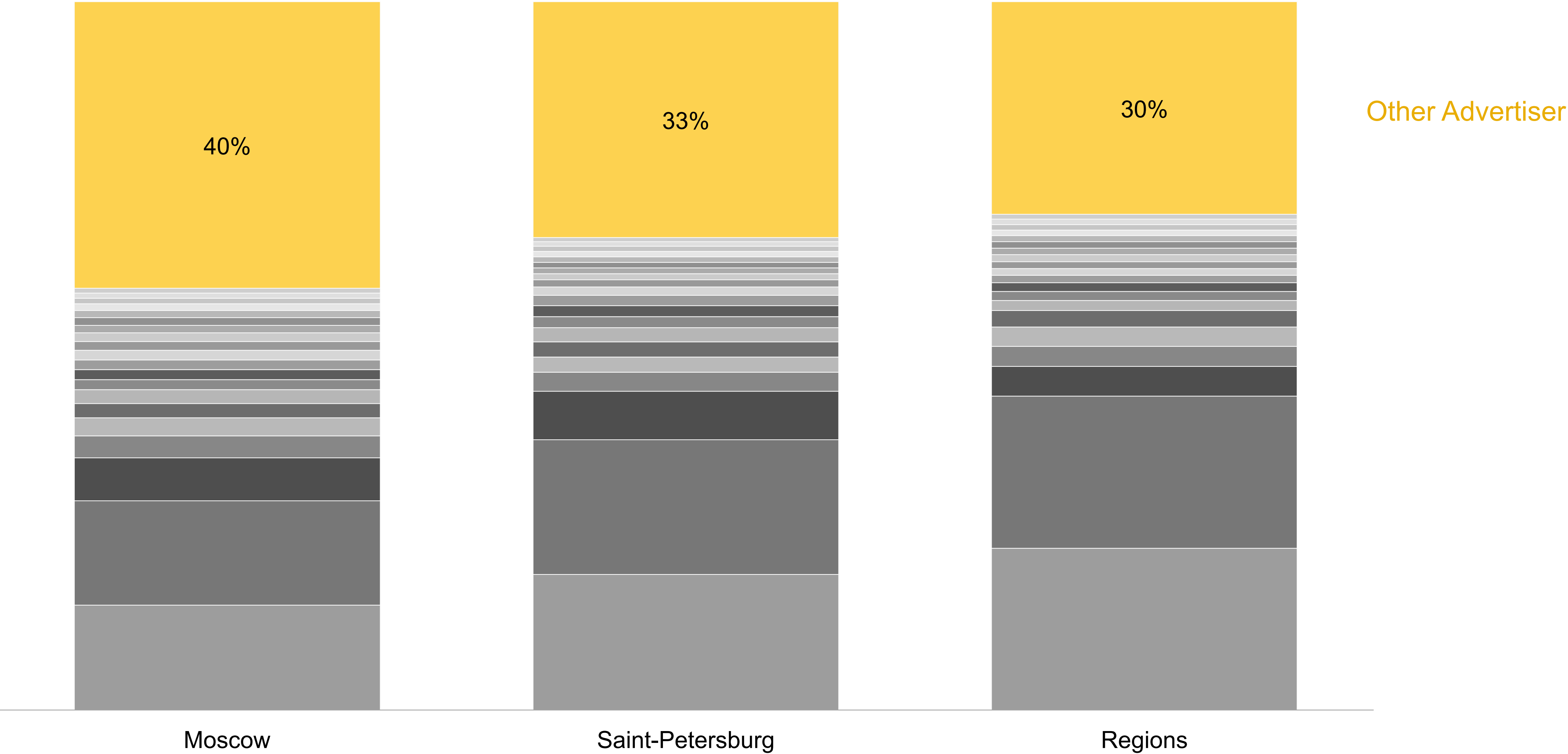
Click share – Search vs. Content



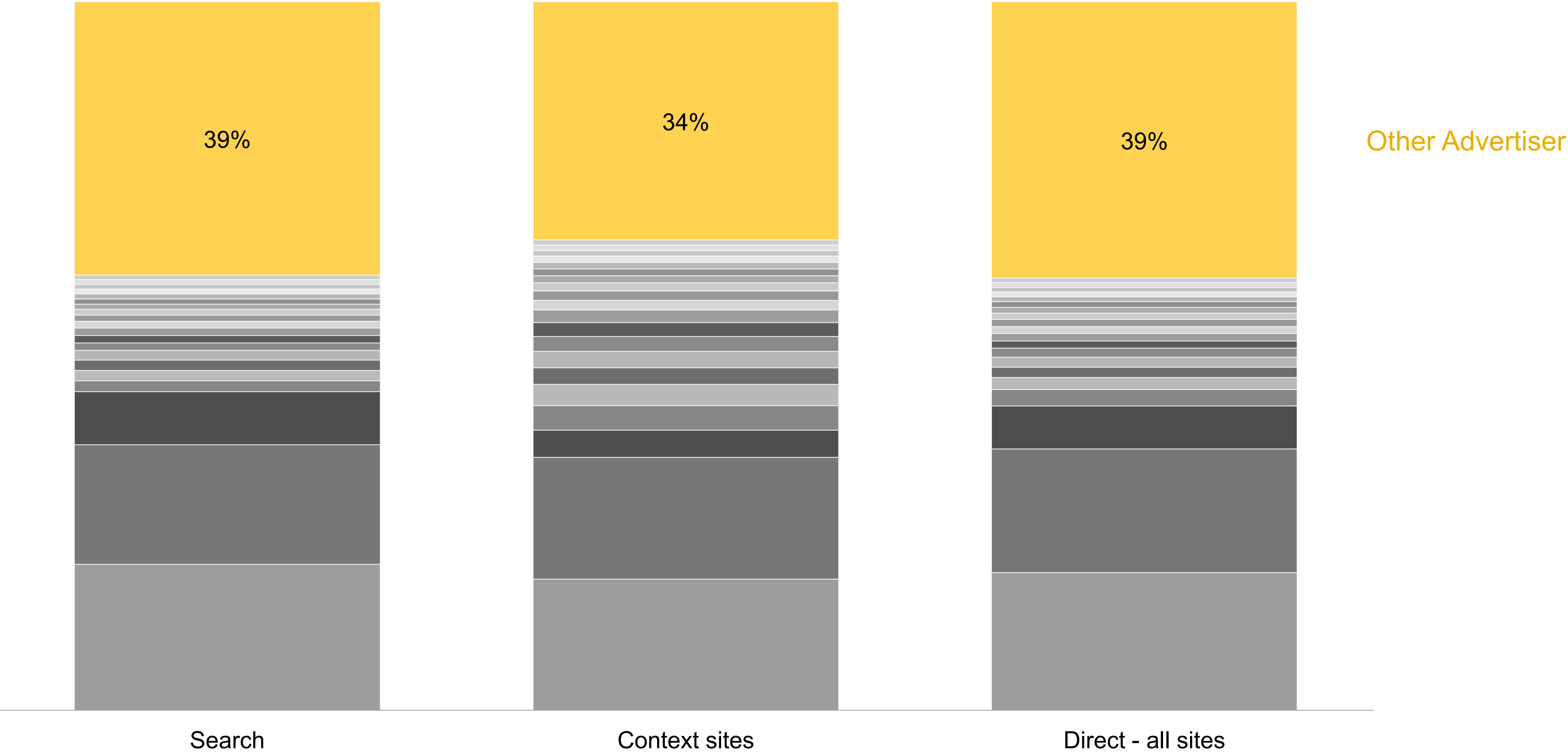
The use of content sites – dynamics



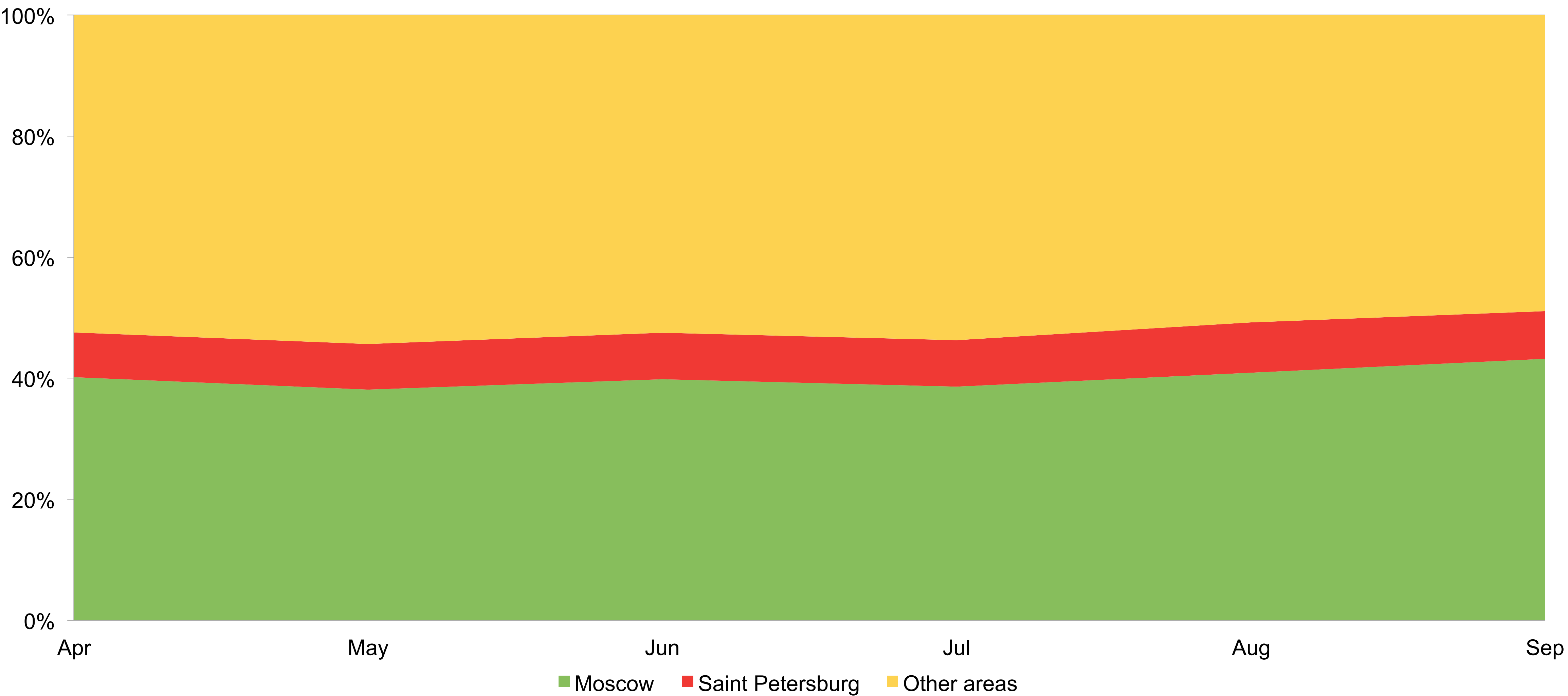
Click share by regions



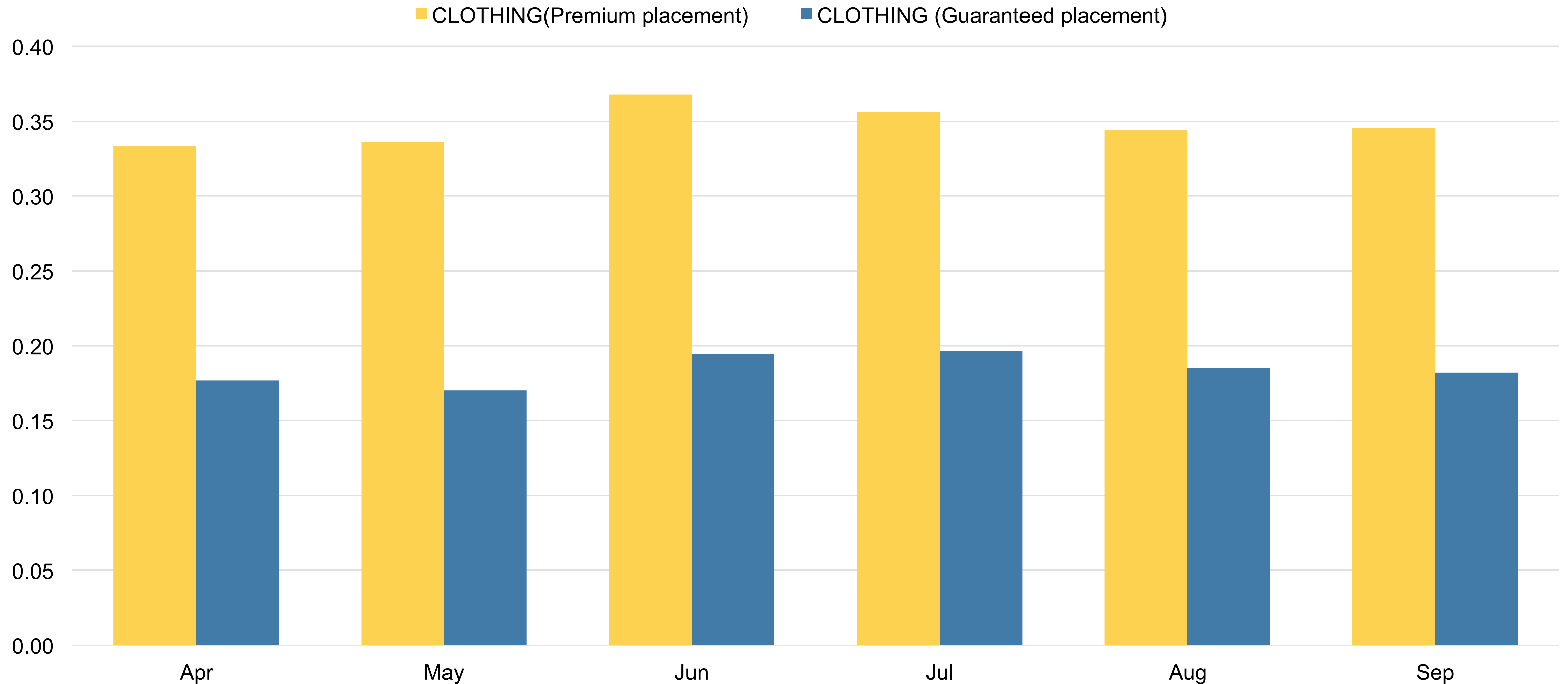
Click share by sites



Clicks distribution by regions



Average CPC by positions





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