

2013

# *MEN'S SHIRTS MARKET IN ST. PETERSBURG*

Phone Interviews, St. Petersburg  
August 2013

New Solution  
2013



## INTRODUCTION

This report was prepared based on the results of a market research conducted by New Solution.

### GOALS OF RESEARCH

1. To determine the percentage of buyers of men's shirts and jumpers among all the residents of St. Petersburg in 2013;
2. To determine the preferred price range for men's long- and short-sleeved shirts;
3. To review the criteria used when choosing men's shirts;
4. To evaluate the spontaneous brand awareness level of men's shirts available in the St. Petersburg market;
5. To evaluate the brand popularity level of men's shirts available in the St. Petersburg market;
6. To identify the sales locations preferred for buying men's shirts;
7. To determine the channels of efficient communication with men's shirts consumers.

### TECHNIQUE USED

Information was gathered by telephone interviews, with 1,009 St. Petersburgers surveyed.

Research was conducted using representative sampling as a mini model of all St. Petersburg residents. Representative sampling was ensured through random selection of telephone numbers from the St. Petersburg home phone array. In respect of the general totality, the representative sampling parameters were controlled for the residents' sex, age and education. The variances of the indicators controlled are within the permissible range. Hence, the research results presented in this report may be used to analyse the behaviour of all the residents of St. Petersburg.

The socio-demographic features of the sampling are shown in **Table 1**.

### FIELD SURVEY

Field survey was conducted by 23 interviewers, with a CATI (Computer Assisted Telephone Interview) system was used for surveying.

Survey period: August 2013.

**Table 1. SOCIO-DEMOGRAPHIC FEATURES OF THE SAMPLING**

<b>Feature</b>	<b>Sampling percentage, % n=1,009</b>
<b>SEX</b>	
<b>Men</b>	46
<b>Women</b>	54
<b>AGE</b>	
<b>16-19</b>	7
<b>20-29</b>	22
<b>30-39</b>	21
<b>40-49</b>	20
<b>50-59</b>	18
<b>60-70</b>	13
<b>INCOME PER FAMILY MEMBER</b>	
<b>Under 5,000 roubles</b>	6
<b>5,001 – 10,000 roubles</b>	23
<b>10,001 – 20,000 roubles</b>	30
<b>20,001 – 30,000 roubles</b>	15
<b>30,001 – 40,000 roubles</b>	5
<b>40,001 – 50,000 roubles</b>	3
<b>Over 50,000 roubles</b>	2
<b>OCCUPATION</b>	
<b>Top executive/Owner</b>	3
<b>Mid-level executive</b>	11
<b>Businessman/Entrepreneur</b>	3
<b>Employee/Specialist</b>	38
<b>Serviceman</b>	1
<b>Factory worker</b>	12
<b>Housewife</b>	6
<b>School/University student</b>	9
<b>Pensioner</b>	12
<b>Unemployed</b>	5
<b>EDUCATION</b>	
<b>Higher / Incomplete higher</b>	56
<b>Secondary / Specialised secondary</b>	41
<b>Incomplete secondary</b>	3
<b>MARITAL STATUS</b>	
<b>Single / Widower / Widow</b>	42
<b>Married / Common-law married</b>	57

## KEY FINDINGS

1. In 2013, 52% of St. Petersburgers have bought shirts, with 22% of men's shirts buyers purchasing both long- and short-sleeved shirts.
2. In 2013, 33% of St. Petersburgers have bought men's jerseys/jumpers.
3. The core target audience for men's shirts includes population groups as follows:
  - ⇒ *sex*: men
  - ⇒ *age*: from 20 to 50 years
  - ⇒ *income level*: over 20,000 roubles per family member
  - ⇒ *occupation*: top and mid-level executives, businessmen and civil servants/servicemen
  - ⇒ *education*: higher
  - ⇒ *marital status*: married
4. Women account for 46% of the total number of men's shirts buyers.
5. A majority of buyers of men's shirts and jumpers buy from one to three items per year.
6. The acceptable price range for men's shirts is:
  - ✓ RUB 400 to RUB 1,200 for long-sleeved shirts
  - ✓ RUB 1,000 for short-sleeved shirts
7. The acceptable price range for men's jumpers is quite wide due to a great variety of materials and models of this product.
8. The long-sleeved shirts market volume and value in 2013 are around 3,800,000 pieces and RUB 3,010,000,000 respectively.
9. The short-sleeved shirts market volume and value in 2013 are around 3,500,000 pieces and RUB 3,430,000,000 respectively.
10. The jumpers market volume and value in 2013 are around 2,620,000 pieces and RUB 4,133,000,000 respectively.
11. The key criteria for selecting a men's shirt are deemed as follows:
  - ✓ colour scheme (45%)
  - ✓ tailoring quality (40%)
  - ✓ fabric type (33%)
12. Colour schemes preferred by buyers of men's shirts are as follows:
  - ✓ pastel shades - 46%
  - ✓ dark colours - 21%
  - ✓ bright colours - 12%
13. Shirt fabrics preferred by buyers of men's shirts are as follows:
  - ✓ natural fabrics - 72%

- ✓ blended fabrics - 19%
  - ✓ synthetic fabrics - 1%
14. The general remark is that the level of awareness of men's shirts manufacturers is quite low – 69% of buyers were at a loss to name at least one men's shirts manufacturer.
15. The leading brands by spontaneous awareness level are:
- ✓ FOSP (4.4%)
  - ✓ Mexx (3.07%)
  - ✓ Ostin (2.69%)
16. The most popular men's shirts brands in St. Petersburg are:
- ✓ FOSP (2.5%)
  - ✓ Ostin (2.3%)
  - ✓ Mexx (2.1%)
17. The most efficient channels of communication with prospective buyers include:
- ⇒ showcase dressing (30.5%)
  - ⇒ website, social networks (27.8%)
  - ⇒ selling assistants' advice (25.9%)
18. 25.9% prefer obtaining information about fashion and clothing sales locations from friends.
19. Men aged over 20 with an income over 20,000 roubles that form the core target audience most often obtain information regarding fashion novelties and clothing sales locations via the Internet and friends.

## 1. BUYERS OF MEN'S SHIRTS AND JUMPERS

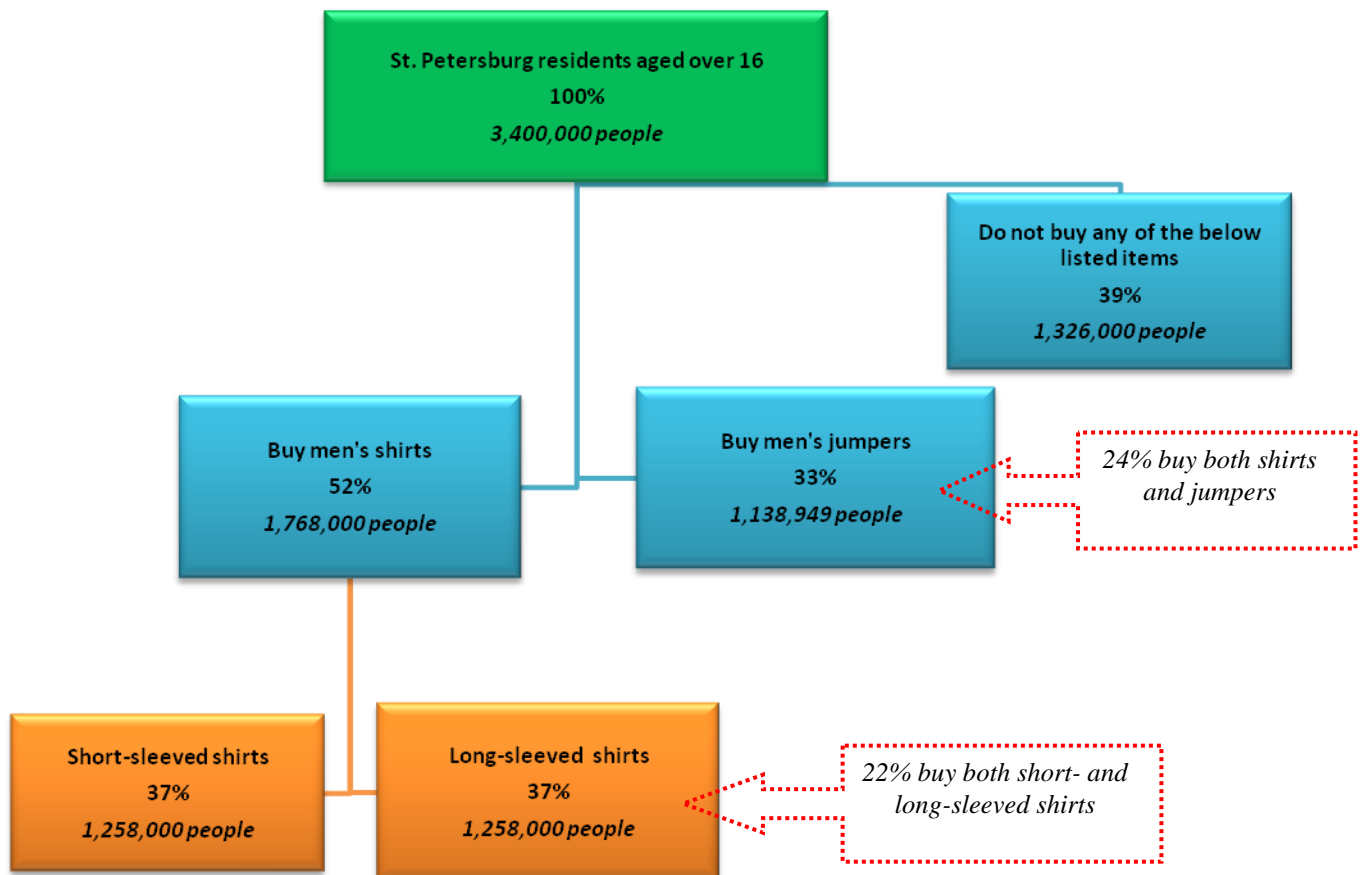
### 1.1. Percentage of Men's Shirts and Jumpers Buyers

**Question:** "WILL YOU PLEASE STATE WHICH OF THE GARMENTS LISTED BELOW YOU HAVE BOUGHT FOR YOURSELF OR OTHER FAMILY MEMBERS, AND ALSO AS A GIFT, FOR THE LAST TWELVE MONTHS?"

52% of St. Petersburgers have bought men's shirts in 2013. 22% of men's shirts buyers this year have bought both long- and short-sleeved shirts. The percentage of buyers purchasing only long-sleeved shirts is equivalent to those purchasing only short-sleeved shirts (around a fourth of the city's population).

33% of St. Petersburgers have bought men's jerseys/jumpers in 2013.

And finally, 39% of St. Petersburg residents maintain they have not bought any of the below listed items this year and are not going to do it in future.



**Figure 1** Percentage of shirts and jumpers buyers among the residents of St. Petersburg

## 1.2. Profile of Men's Shirts and Jumpers Buyers

To characterise each consumer segment we use the Affinity Index that reflects differences in the socio-demographic composition of men's suits buyers and the sampling composition as a whole.

100% means there is a complete match in the socio-demographic composition of both audiences. A value in excess of 100% means that the demographic group concerned is typical and promising. A value under 100% means that the demographic group concerned is less typical of the market under research.

Consequently, the table shows that men's shirts buyers pertain primarily to the following population groups:

- ⇒ *sex*: male
- ⇒ *age*: from 20 to 50 years old
- ⇒ *income level*: over 20,000 roubles per family member
- ⇒ *occupation*: top and mid-level executives, businessmen and civil servants/servicemen
- ⇒ *education*: higher
- ⇒ *marital status*: married



*It should be noted that the percentage of women buying men's shirts for their family members, or as a gift, is quite high – 46% of the total number of men's shirts buyers.*

The audience of men's jumpers/jerseys buyers generally matches the audience of men's shirts buyers. However, the following populations groups are also noticeable among jumper buyers:

- ⇒ **Age**: from 16 to 19 years
- ⇒ **Occupation**: school and university students
- ⇒ **Education**: secondary

*Hence, the audience of men's jumpers buyers is more differentiated than the audience of shirts buyers.*



**Figure 2. Profile of the target audience**

Table 2. Affinity Index for the target audience

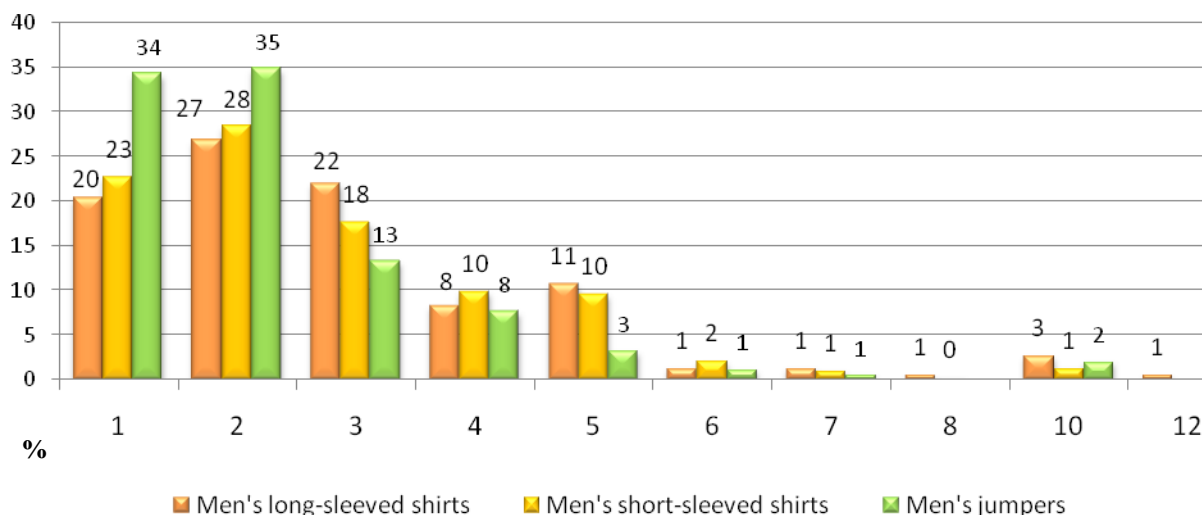
Feature	Total, % n=1009	Buyers of men's shirts, % n=521	Affinity Index, %	Buyers of men's jumpers, % n=338	Affinity Index, %
<b>SEX</b>					
Men	46	53	<b>116%</b>	51	<b>111%</b>
Women	54	47	<b>86%</b>	49	<b>90%</b>
<b>AGE</b>					
16-19	7	6	<b>86%</b>	7	<b>102%</b>
20-29	22	23	<b>105%</b>	24	<b>110%</b>
30-39	21	21	<b>103%</b>	25	<b>119%</b>
40-49	20	21	<b>106%</b>	22	<b>115%</b>
50-59	18	17	<b>96%</b>	14	<b>78%</b>
60-70	13	12	<b>92%</b>	8	<b>59%</b>
<b>INCOME PER FAMILY MEMBER</b>					
Under 5,000 roubles	6	4	<b>65%</b>	4	<b>70%</b>
5,001 – 10,000 roubles	23	17	<b>74%</b>	15	<b>67%</b>
10,001 – 20,000 roubles	30	29	<b>96%</b>	29	<b>95%</b>
20,001 – 30,000 roubles	15	18	<b>122%</b>	20	<b>137%</b>
30,001 – 40,000 roubles	5	7	<b>141%</b>	8	<b>158%</b>
40,001 – 50,000 roubles	3	4	<b>158%</b>	3	<b>122%</b>
Over 50,000 roubles	2	3	<b>123%</b>	2	<b>109%</b>
<b>OCCUPATION</b>					
Top executive /Owner	3	5	<b>138%</b>	5	<b>136%</b>
Mid-level executive	11	13	<b>120%</b>	15	<b>132%</b>
Businessman/Entrepreneur	3	4	<b>149%</b>	5	<b>195%</b>
Employee/Specialist	38	41	<b>107%</b>	38	<b>100%</b>
Serviceman	1	2	<b>174%</b>	1	<b>149%</b>
Factory worker	12	10	<b>84%</b>	10	<b>86%</b>
Housewife	6	5	<b>82%</b>	6	<b>96%</b>
School/University student	9	7	<b>87%</b>	9	<b>106%</b>
Pensioner	12	9	<b>76%</b>	6	<b>50%</b>
Unemployed	5	3	<b>74%</b>	4	<b>89%</b>
<b>EDUCATION</b>					
Higher \ Incomplete higher	56	61	<b>110%</b>	61	<b>109%</b>
Secondary \ Specialised secondary	41	37	<b>89%</b>	36	<b>88%</b>
Incomplete secondary	3	2	<b>62%</b>	3	<b>106%</b>
<b>MARITAL STATUS</b>					
Unmarried / divorced / widowed	42	35	<b>82%</b>	33	<b>77%</b>
Married / common law married	57	64	<b>113%</b>	67	<b>118%</b>



## 2. VOLUME OF MEN'S SHIRTS MARKET

**Question:** “WILL YOU PLEASE STATE HOW MANY OF THE GARMENTS MARKED YOU HAVE BOUGHT FOR YOURSELF OR OTHER FAMILY MEMBERS, AND ALSO AS A GIFT, FOR THE LAST TWELVE MONTHS?”

Most of the men's shirts and jumpers buyers purchase from one to three items per year. The quantity of long-sleeved items is commonly lower than that of short-sleeved items.

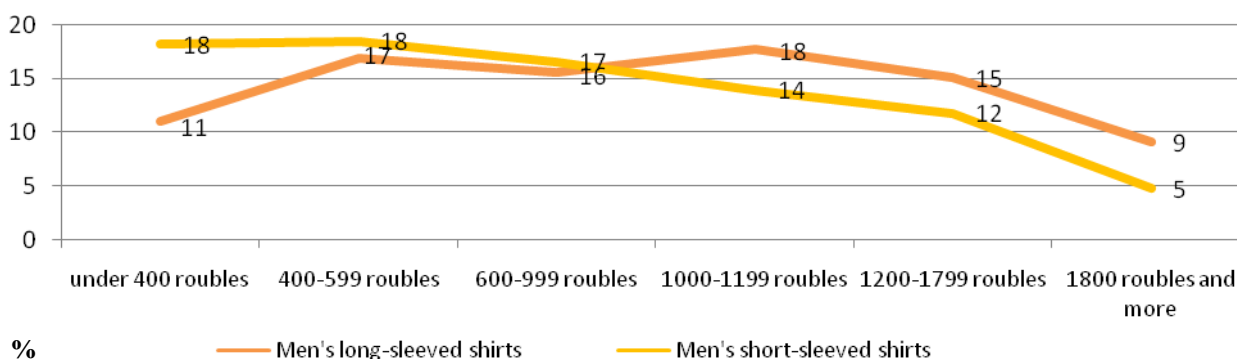


**Figure 3. Quantity of men's shirts and jumpers purchased this year**

**Question:** “WHAT AMOUNT OF MONEY DO YOU COMMONLY SPEND ON THE GARMENTS YOU NEED?”

The acceptable men's shirts price range is:

- ⇒ **400 to 1,200 roubles** for long-sleeved shirts. For prices under 400 roubles, the demand drops because of the consumers' doubts regarding the product quality.
- ⇒ **up to 1,000 roubles** for short-sleeved shirts.



**Figure 4. Acceptable price range for the products under research: Shirts**

The acceptable price range for men's jumpers is quite wide since this product features a great variety of fabrics and models. There is a remarkably high share of buyers willing to pay over 2,100 roubles for a jumper.



**Figure 5. Acceptable price range for the products under research: Jumpers**

Based on the data on the product's average price and the average number of buys per year, the approximate volume of St. Petersburg's shirts and jumper market in 2010 may be calculated:

**Table 3. Approximate volume of St. Petersburg's shirts and jumpers market in 2010**

Product	Average number of buys per year	Number of buyers	Average price	Market volume (000' pieces)	Market volume (000' roubles)
Short-sleeved shirts	3.0	1,258,000	798	3,774	3,011,652
Long-sleeved shirts	2.8	1,258,000	974	3,522	3,430,818
Jumpers/jerseys	2.3	1,138,949	1,578	2,620	4,133,702

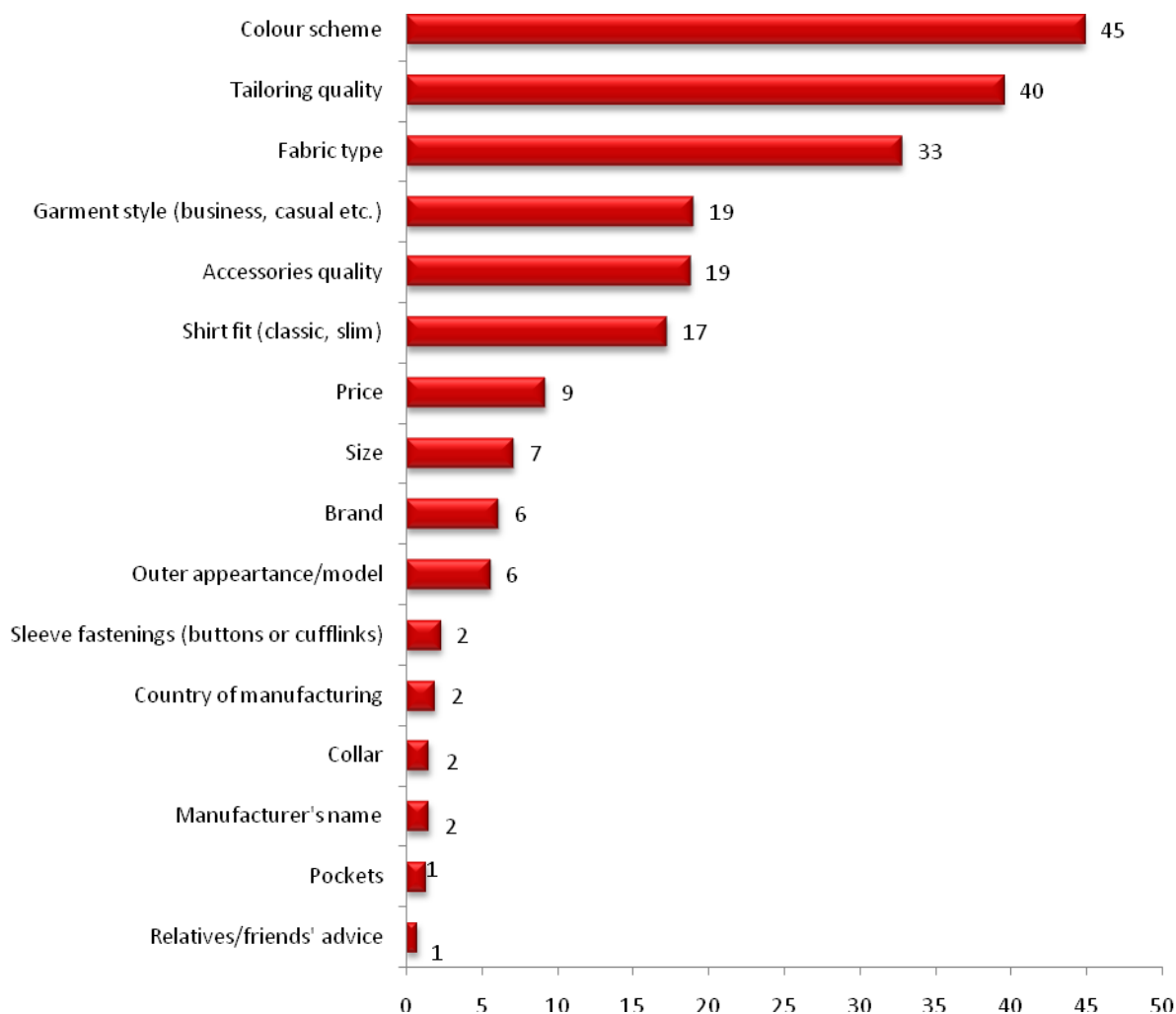
### 3. CONSUMERS' PREFERENCES WHEN CHOOSING MEN'S SHIRTS

#### 3.1. Criteria of Men's Shirts Selection

**Question:** "COULD YOU PLEASE INDICATE WHAT YOU CONSIDER WHEN CHOOSING A MEN'S SHIRT?"

The key criteria of men's shirts' selection are as follows:

- ⇒ colour scheme (45%)
- ⇒ tailoring quality (40%)
- ⇒ fabric type (33%)



**Figure 6. Criteria of men's shirt selection**

The general remark is that when choosing a men's shirt women focus more on the parameters such as tailoring and accessories quality, fabric type, price. Men focus more on the shirt style (business, casual etc.) and model.

***It should be noted that price is not the decisive factor for choosing a men's shirt.***

The key target audience group, men with an income over 20,000 roubles, do not consider the above factor as important. Shirt price is more important for women as well as buyers with an income under 20,000 roubles per family member.

**Table 4. Criteria of men's shirt selection (depending on sex)**

	Men N=278	Women N=243	Total N=521
Colour scheme	45	45	45
Tailoring quality	33	47	40
Fabric type	28	38	33
Garment style (business, casual etc.)	22	16	19
Accessories quality	14	24	19
Shirt fit (classic, slim)	19	16	17
Price	8	11	9

**Table 5. Criteria of men's shirt selection (depending on age)**

	Aged 16-19 N=31	Aged 20-29 N=120	Aged 30-39 N=111	Aged 40-49 N=108	Aged 50-59 N=89	Aged 60-70 N=62	Total N=521
Colour scheme	61	43	32	48	47	56	45
Tailoring quality	55	39	41	43	36	31	40
Fabric type	10	31	28	34	36	50	33
Garment style (business, casual etc.)	23	19	15	23	15	23	19
Accessories quality	23	18	19	18	19	21	19
Shirt fit (classic, slim)	10	23	11	16	19	21	17
Price	10	13	10	8	6	8	9

**Table 6. Criteria of men's shirt selection (depending on income level)**

	Under 5,000 roubles N=20	5,001- 10,000 roubles N=87	10,001- 20,000 roubles N=152	over 20,000 roubles N=166	Total N=521
Colour scheme	50	46	38	49	45
Tailoring quality	50	45	39	34	40
Fabric type	25	34	33	34	33
Garment style (business, casual etc.)	15	14	18	22	19
Accessories quality	40	23	18	15	19
Shirt fit (classic, slim)	15	18	17	17	17
Price	15	9	11	5	9

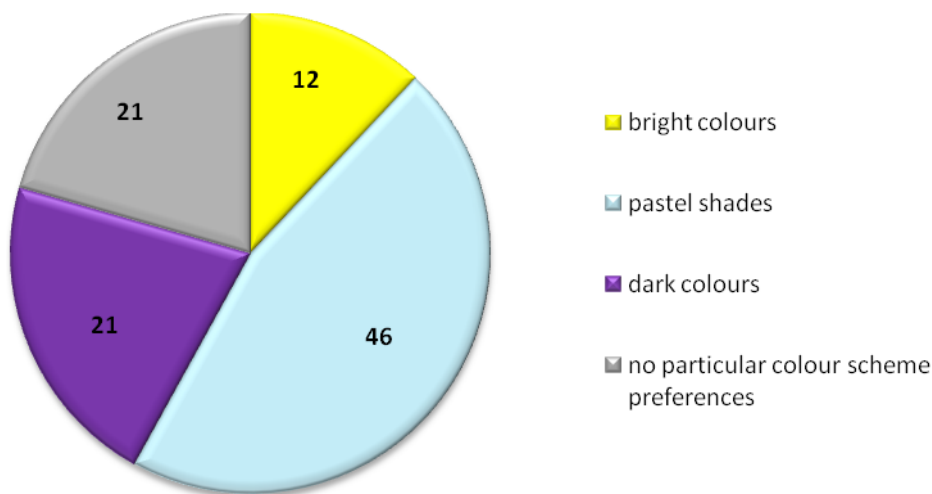
### 3.2. Colour Scheme Preferences

**Question: “WHAT COLOUR SCHEME SHIRTS DO YOU PREFER TO BUY”**

Men’s shirts buyers prefer colour schemes as follows:

- ⇒ pastel shades - 46%
- ⇒ dark colours - 21%
- ⇒ bright colours - 12%
- ⇒ *no particular preferences* - 21%

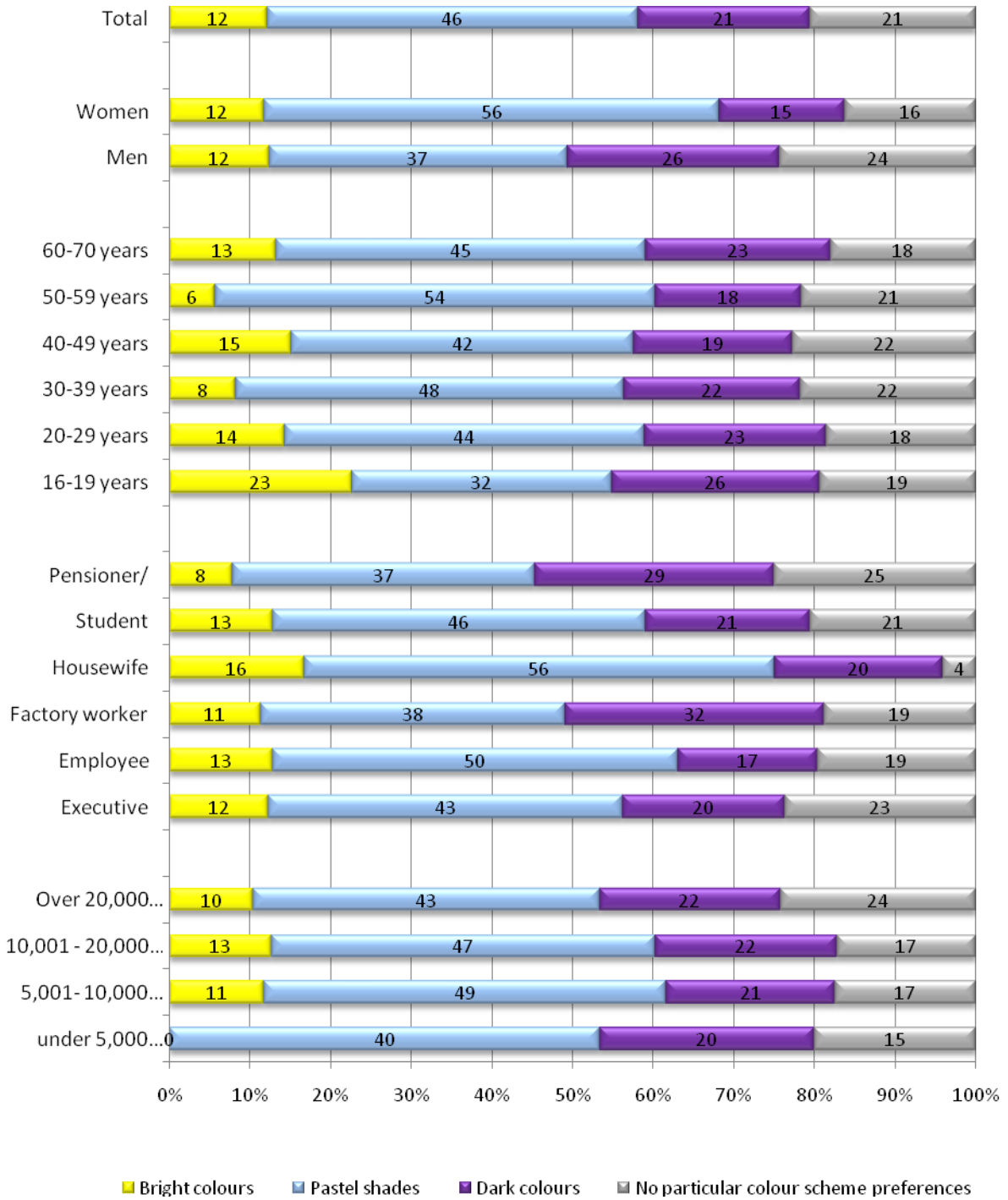
*Hence, a majority of buyers prefer men’s shirts of pastel shades.*



**Figure 7. Colour scheme preferences of men’s shirts buyers**

It may be noted that dark shirts are more often bought by men while women (for their family members, or as a gift) more often choose shirts of pastel shades.

It may also be stated that executives and buyers with an income over 20,000 roubles, are not limited to any particular colours when choosing a shirt.



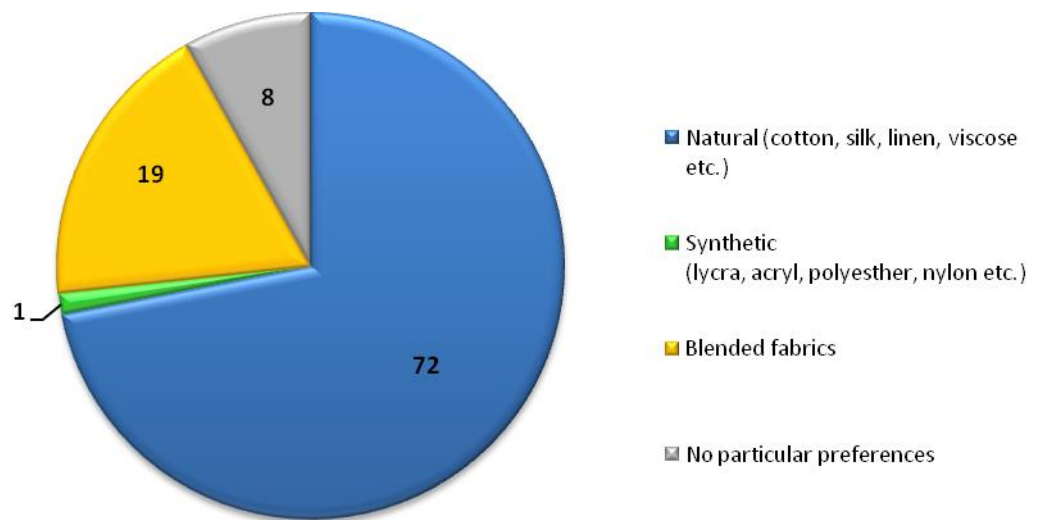
**Figure 8. Colour scheme preferences of men's shirts buyers (depending on socio-demographic parameters)**

### 3.3. Fabric Preferences

**Question: “WHAT ARE THE FABRICS THAT YOU PREFER FOR THE SHIRTS YOU BUY”**

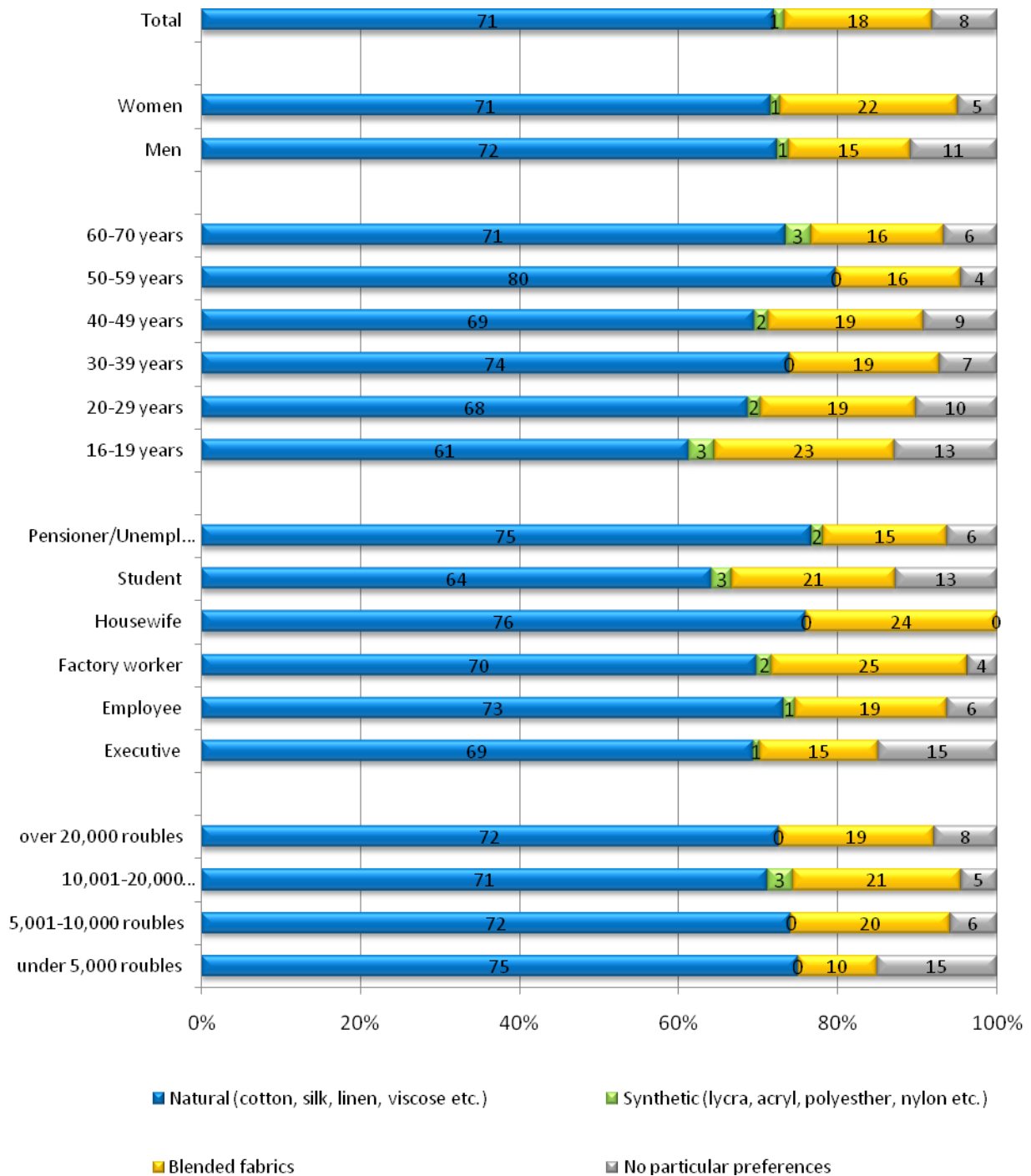
The fabric preferences of men’s shirts buyers are as follows:

- ⇒ natural fabrics - 72%
- ⇒ blended fabrics - 19%
- ⇒ synthetic fabrics - 1%
- ⇒ *no particular preferences* - 8%



**Figure 9. Buyers’ preferences regarding men’s shirts fabric**

It may be noted that women more often prefer buying blended fabric shirts. The rest of shirt fabric preferences do not depend on the buyers’ socio-demographic features.



**Figure 10. Buyers' preferences regarding men's shirts fabric (depending on socio-demographic parameters)**



## 4. IMAGE OF MEN'S SHIRT BRANDS AND MANUFACTURERS

### 4.1. Spontaneous Awareness of Men's Shirt Brands/Manufacturers

**Question: "WHAT MEN'S SHIRT BRANDS/MANUFACTURERS DO YOU KNOW?"**

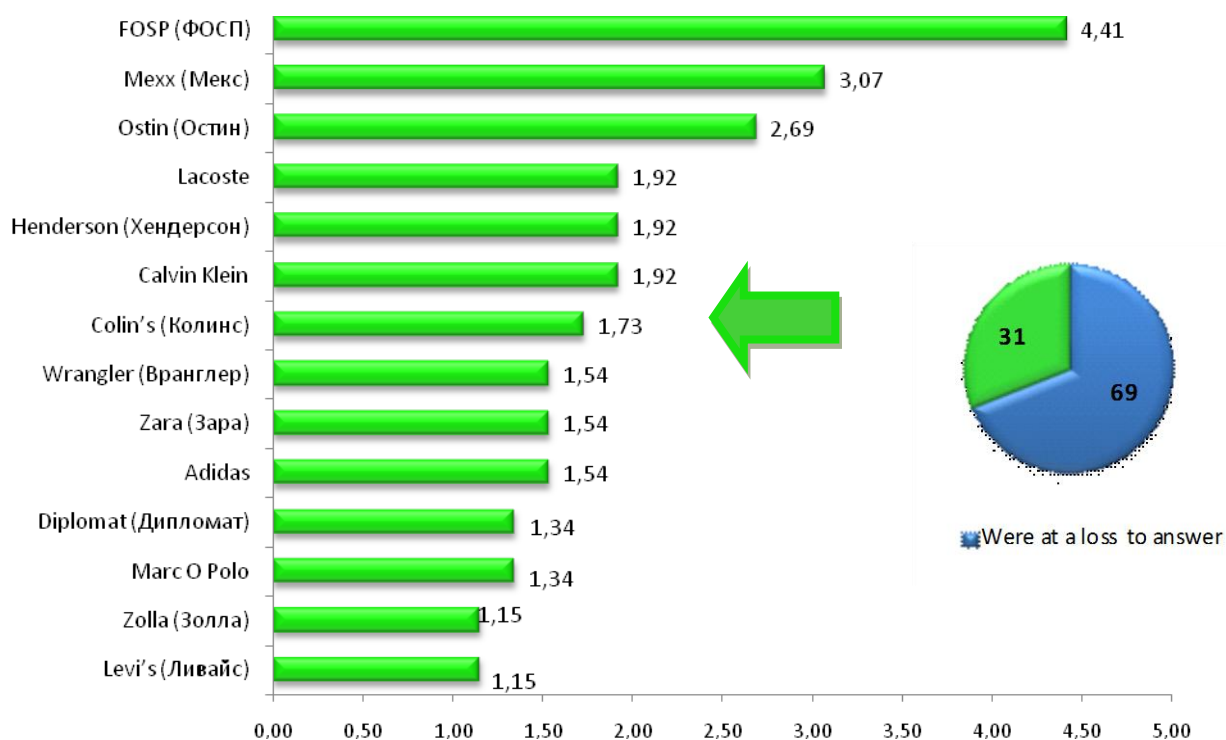
*The general remark is that the level of awareness of men's shirt manufacturers is quite low – 69% of buyers were at a loss to name at least one men's shirt manufacturer.* It may be assumed that a significant share of buyers purchase noname shirts or do not focus on any brand.

The low level of spontaneous awareness of all brands may also mean that there is no strong brand in the market focussing on men's shirts in particular. The buyers tend to recall primarily the brand related to men's suits (FOSP).

The spontaneous brand awareness leaders are as follows:

- ✓ FO SP (4.4%)
- ✓ Mexx (3.07%)
- ✓ Ostin (2.69%)

It may be stated that consumers with an income over 20,000 roubles per family member show better spontaneous awareness of the existing men's shirt brands (due to active consumption).



**Figure 11. Spontaneous awareness of men's shirt brands**

## 4.2. Popularity of Men's Shirt Brands/Manufacturers

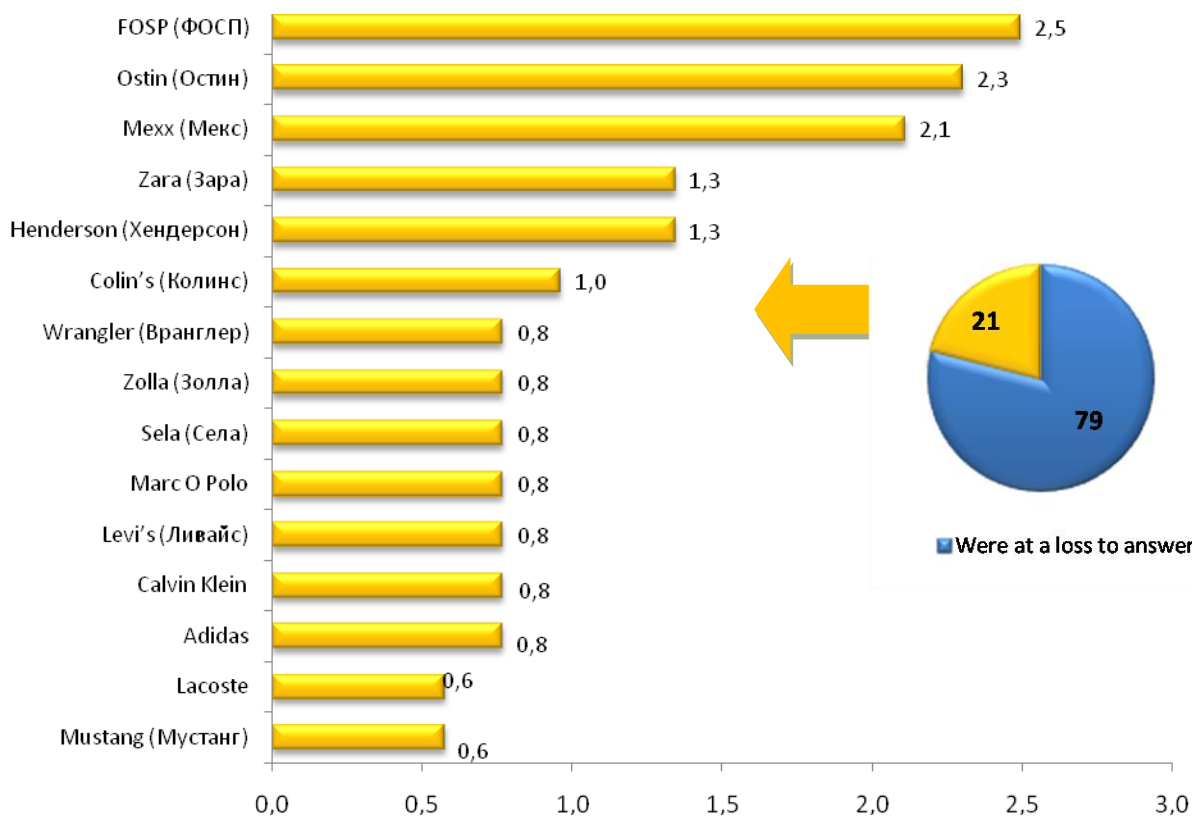
**Question: “WHAT MEN’S SHIRT BRANDS/MANUFACTURERS DO YOU PREFER TO BUY?”**

The most popular men’s shirt brands in St. Petersburg are:

- ✓ FOSP (2.5%)
- ✓ Ostin (2.3%)
- ✓ Mexx (2.1%)

*The list of most popular brands matches the list of spontaneous brand awareness leaders.*

*A special mention should be made of the high percentage of those who were at a loss to answer – 79% of men’s shirts buyers could not name a single brand preferred.*



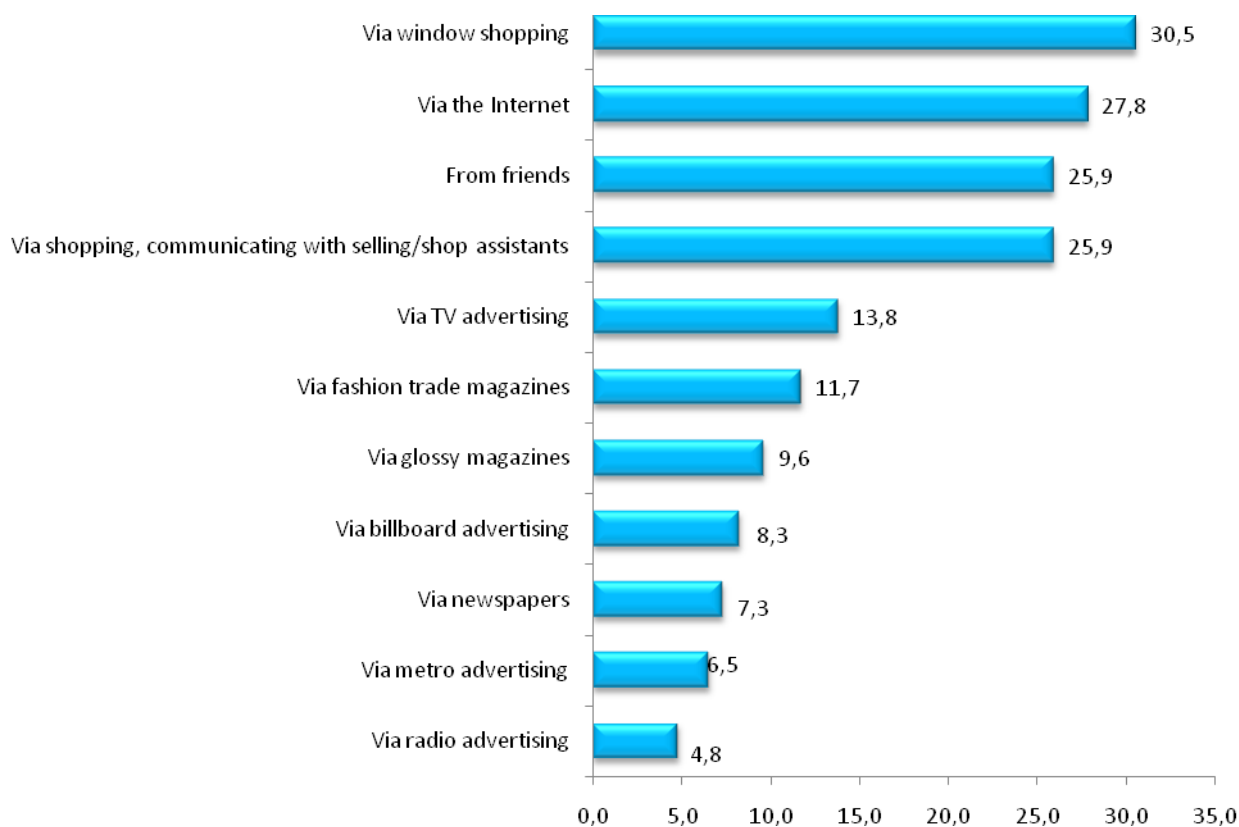
### 4.3. Key Communication Channels

**Question: “WILL YOU PLEASE STATE FROM WHAT SOURCES YOU PREFER TO GET INFORMATION ON FASHION AND GARMENT SALES LOCATIONS?”**

The most efficient channels of communication with prospective buyers include:

- ⇒ showcase dressing (30.5%)
- ⇒ website, social networks (27.8%)
- ⇒ selling assistants' advice (25.9%)

It should be noted that a large percentage of buyers (25.9%) prefer getting information on fashion and garment sales locations from their friends.



**Figure 13. Key channels of communication with men's shirts buyers**

The general remark is that women pay more attention to different sources of advertising than men.

Showcases primarily draw the attention of the following consumer categories:

- ⇒ **Sex:** women
- ⇒ **Age:** from 20 to 50 years
- ⇒ **Income level:** from 5,000 roubles to 20,000 roubles per family member
- ⇒ **Occupation:** executives, employees, housewives, students

The Internet is the key source of information on fashion and garment sales locations for the following consumer categories:

- ⇒ **Sex:** men and women
- ⇒ **Age:** from 16 to 40 years
- ⇒ **Income level:** over 20,000 roubles per family member
- ⇒ **Occupation:** executives, employees, housewives, students

Communication with selling assistants is an important source of information primarily for the following consumer categories:

- ⇒ **Sex:** men and women
- ⇒ **Age:** over 40 years
- ⇒ **Income level:** from 10,000 roubles to 20,000 roubles per family member
- ⇒ **Occupation:** employees, pensioners

Obtaining information on fashion and garment shops is mostly typical of the following buyers' categories:

- ⇒ **Sex:** men and women
- ⇒ **Age:** from 20 to 40 years
- ⇒ **Income level:** over 10,000 roubles per family member
- ⇒ **Occupation:** executives, employees

*Men aged over 20 years, with an income over 20,000 roubles that form part of the core target audience most often obtain information on fashion novelties and garment sales locations via the Internet and friends.*

Communication via TV and magazines is deemed lowly efficient because it primarily draws the attention of buyers with a low and lowest average income (under 10,000 roubles).

**Table 7. Key channels of communication with men's shirts buyers (depending on sex)**

	Men N=278	Women N=243	Total N=521
Window shopping	24	<b>37</b>	31
Via the internet	<b>27</b>	<b>29</b>	28
Via shopping, communicating with selling/shop assistants	24	<b>28</b>	26
From friends	24	<b>28</b>	26
Via TV advertising	9	<b>19</b>	14
Via fashion trade magazines	5	<b>19</b>	12
Via glossy magazines	4	<b>16</b>	10

**Table 8. Key channels of communication with men's shirts buyers (depending on age)**

	Aged 16-19 N=31	Aged 20-29 N=120	Aged 30-39 N=111	Aged 40-49 N=108	Aged 50-59 N=89	Aged 60-70 N=62	Total N=521
Window shopping	29	<b>35</b>	<b>31</b>	<b>32</b>	28	23	31
Via the internet	<b>52</b>	<b>45</b>	<b>32</b>	26	7	10	28
Via shopping, communicating with selling/shop assistants	16	22	19	<b>28</b>	<b>37</b>	<b>32</b>	26
From friends	26	<b>32</b>	<b>28</b>	26	20	19	26
Via TV advertising	<b>16</b>	13	13	12	<b>16</b>	<b>16</b>	14
Via fashion trade magazines		10	<b>16</b>	<b>20</b>	7	5	12
Via glossy magazines	10	<b>13</b>	<b>12</b>	9	6	6	10

**Table 9. Key channels of communication with men's shirts buyers (depending on occupation)**

	Executive, N=115	Employee, N=222	Factory worker, N=53	Housewife, N=25	Student, N=39	Pensioner/ Unemployed, N=65	Total N=521
Window shopping	<b>31</b>	<b>35</b>	17	<b>44</b>	<b>36</b>	18	31
Via the internet	<b>34</b>	<b>28</b>	17	<b>32</b>	<b>51</b>	11	28
Via shopping, communicating with selling/shop assistants	24	<b>30</b>	23	20	15	<b>28</b>	26
From friends	<b>27</b>	<b>30</b>	26	20	26	14	26
Via TV advertising	<b>17</b>	12	6	<b>20</b>	<b>21</b>	<b>15</b>	14
Via fashion trade magazines	10	<b>14</b>	8	<b>16</b>	5	12	12
Via glossy magazines	7	<b>11</b>	2	<b>12</b>	<b>13</b>	<b>12</b>	10

**Table 10. Key channels of communication with men's shirts buyers (depending on income level)**

	under 5,000 roubles N=20	5,001- 10,000 py6. N=87	10,001-20,000 roubles N=152	over 20,000 roubles N=166	Total N=521
Window shopping	20	<b>37</b>	<b>34</b>	27	31
Via the internet	10	18	24	<b>39</b>	28
Via shopping, communicating with selling/shop assistants	25	26	<b>30</b>	22	26
From friends	25	20	<b>30</b>	<b>27</b>	26
Via TV advertising	10	<b>15</b>	14	14	14
Via fashion trade magazines	<b>20</b>	<b>13</b>	11	11	12
Via glossy magazines	<b>15</b>	<b>13</b>	9	8	10