



Exclusive industry research reflected the fashion preferences of young Kazakhstanis

The data of an exclusive industry research was presented in Almaty at the business conference of the 31st Central Asia Fashion Spring-2023 International Fashion Exhibition. The subject of the research was the lifestyle of young people, namely their leisure, shopping and fashion preferences of young Kazakhstanis.

According to the results of the research, Natalia Ospanova, the Kazakhstani expert, the Director of the Alvin Market Research Companies Group and the President of the Kazakhstan Association of the Professional Researchers of Public Opinion and Market (KAPIOR) spoke about how Kazakhstani young people spend their leisure time and what they spend money on in different regions of the country and discussed priorities for Kazakhstanis: shopping, sports, entertainment or self-education. She also noted her favourite fashion shopping places and their main drivers and reasons for NOT making a purchase. The experts studied in detail the hobbies of Kazakhstani young people and how much and for what young residents of the country are willing to pay.



Natalia Ospanova, the Director of the Alvin Market Research Companies Group and the President of the Kazakhstan Association of the Professional Researchers of Public Opinion and Market (KAPIOR)

How Kazakhstani young people spend their leisure time and what they spend money on in different regions

As Natalia Ospanova, the speaker of the CAF business conference, noted the group of the online survey conducted in early March 2023 included young people from all over Kazakhstan aged 14 to 35 years, while 24% of the respondents were in the category of teenagers under 18 years old, and 22% are young residents of the country under 24 years old. It is noteworthy that 81% of the survey respondents are urban residents of Kazakhstan and 19% are rural residents,

and respondents could choose Russian or Kazakh when filling out the questionnaire; as a result, 46% chose the state language.

“We wondered what young people are doing, whether they have free time in principle and how they spend it,” Natalia Ospanova, the expert, shares the results of the research.

It was shown that Kazakhstanis aged 14-18 are no longer no longer opposed to getting a job and earning their own money. However, some concern is caused by the fact that in the active working age of 25-35 years, only 60% of the respondents have a permanent job. The remaining 40%, for various reasons, are not yet actively involved in the labour market.”

An analysis of free time showed that the average Kazakhstani young person every day, in addition to sleep, has about 4 hours. In terms of regions, Astana and Almaty, the data are different: in cities, young people have an hour more free time than rural residents. In addition, the girls turned out to be busier than the boys, who also get an extra hour at their disposal. It is noted that as they grow up and complete active learning, Kazakhstanis have more free time.



Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. Every second Kazakhstani aged 25-35 works full-time working day

At the same time, according to Natalia Ospanova the speaker of the CAF business conference, speaking about leisure, about 30% of young Kazakhstanis are closed exclusively to the family circle.

“If we consider the regional context, we see that the diversity in types of leisure is more observed among residents of the northern and southern capitals. In terms of gender difference and difference by age groups, here we will see quite an interesting picture. Thus, girls are more focused on spending leisure time with their families, they like to watch movies, read books, do shopping and take care of themselves. Boys are more focused on spending their leisure time outside the home, they devote more time to sports, computer games, education, the CAF expert says.

If we talk about family leisure, then the proportion of those who spend time with family and children increases dramatically with age. As for sports, it is not as good here: interest in sports fades with age. At the same time, the types of occupations that are more associated with the expansion of social ties are increasing. Accordingly, growing up Kazakhstanis are more ready to communicate with friends in a cafe, to go hiking or walking.”

Молодежь столиц более разнообразно проводит свое свободное время

Чем занимается молодежь в свободное время?

КАК ВЫ ПРОВОДИЛИ СВОБОДНОЕ ВРЕМЯ ЗА ПОСЛЕДнюю НЕДЕЛЮ?

* ПОКАЗАНЫ ВИДЫ ДОСУГА, НАБЛЮДАЮЩИЕ БОЛЕЕ 5% В ЦЕЛОМ ПО РК

	РК	СЕВЕР	ЗАПАД	ЮГ	ВОСТОК	СТОЛИЦЫ
Проводил(а) время с семьей	32%	20%	30%	34%	41%	37%
Смотрел(а) фильмы/ сериалы	28%	27%	18%	27%	35%	35%
Гулял(а)	22%	19%	20%	22%	15%	29%
Слушал(а) музыку	21%	20%	14%	19%	24%	29%
Отдыхал(а) от всех дел	16%	16%	24%	12%	18%	19%
Занимался(ась) спортом	15%	15%	17%	14%	11%	15%
Встречался(ась) с друзьями в кафе/ барах	13%	17%	4%	8%	21%	23%
Читал(а) книги	12%	16%	4%	11%	15%	18%
Играл(а) в компьютерные игры	10%	13%	5%	8%	5%	15%
Выезжал(а) на природу/ путешествовать	9%	6%	8%	9%	11%	9%
Занимался(ась) творчеством/ хобби	9%	10%	7%	8%	10%	9%
Занимался(ась) шопингом в магазинах/ ТЦ	8%	6%	10%	6%	11%	12%
Ухаживал(а) за собой, ходил(а) в салоны красоты/ СПА	8%	5%	8%	7%	10%	11%
Проходил(а) образовательные курсы, учился(ась)	6%	1%	13%	7%	1%	8%

Север	Акмолинская Карагандинская Костанайская СКО Область Улытау
Запад	Актюбинская Атырауская ЗКО Мангистауская
Юг	Алматинская Жамбылская Область Жетысу Курчатовская Туркестанская г. Шымкент
Восток	Абайская область Павлодарская ВКО
Столицы	г. Астана г. Алматы

МАРТ 2023.
Выборка 519 чел.
Данные взвешены по основным социально-демографическим характеристикам.

Значимо ВЫШЕ / НИЖЕ по сравнению с РК на основании Индекса соответствия

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НЕСТАНДАРТНЫЕ МАРКЕТИНГОВЫЕ ИССЛЕДОВАНИЯ

Slide from the presentation of Natalia Ospanova's speech at the CAF business conference.
What do the young people of Kazakhstan do in their free time?

Following to a scientific point of view, the more the population in society is engaged in active types of recreation, the healthier it is physically and psychologically, the researchers grouped the types of employment of young citizens of the republic according to the degree of recreational activity. As a result, the data showed that 70% of the surveyed Kazakhstanis choose an active type of recreation.

As for hobbies, here sociologists reflected those who received the maximum number of mentions. Definitely, cultural leisure among Kazakhstani young people prevails: watching movies, programs, listening to music were the most popular. Walking, fitness and sports, cooking, computer games, reading books and raising children were also among the popular activities.

Спектр увлечений заметно отличается в возрастных группах

Какие увлечения есть у молодежи?

КАКИМ ХОББИ ВЫ УВЛЕКАЕТЕСЬ?

	РК	14-18	19-24	25-35
Просмотр фильмов/ сериалов/ передач	27%	18%	27%	32%
Музыка	23%	22%	34%	18%
Прогулки	22%	17%	24%	23%
Спорт/ фитнес/ тренажерный зал	20%	26%	22%	17%
Кулинария	19%	10%	19%	23%
Компьютерные или консольные игры	16%	26%	17%	11%
Чтение книг/ газет	14%	10%	18%	14%
Воспитание детей/ детский досуг	11%	4%	5%	17%
Активный отдых/ время на природе	9%	3%	11%	11%
Фотография	9%	4%	6%	12%
Путешествия, туризм	9%	10%	7%	8%
Рукоделие	7%	3%	10%	8%
Танцы	7%	10%	8%	5%
Вождение/ ремонт автомобилей	6%	5%	7%	7%
Настольные игры	6%	5%	10%	5%
Ведение социальных сетей	6%	3%	7%	6%
Вязание	5%	4%	7%	5%

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Slide from the presentation of Natalia Ospanova's speech at the CAF business conference.
What are the hobbies of Kazakhstani young people?

Shopping, sports, entertainment, self-education: what is the priority of Kazakhstanis

As Natalia Ospanova, the authoritative speaker of the CAF business conference, shares, 4 groups of key interests of young people were identified in the course of the research for more detailed study.

“First of all, we examined those who are engaged in self-education and consume educational content. In general, we wanted to understand whether our young people are more focused on entertainment or are they ready to spend their free time on self-development? The results showed that 66% of respondents are ready to devote their free time from study to self-education. (ed. note - The most active period of consumption of educational content falls on student age 19-24, and interest in self-development is higher in Astana and Almaty). It's not just reading books that are useful in studying. This is the consumption of any educational content.



Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. Are young people engaged in self-education?

The second place is taken by cultural leisure associated with visits to various cultural and entertainment facilities: karaoke, clubs, theatres, cinemas, etc. Every second young Kazakhstani is ready to spend his time in such a way, in Astana and Almaty there are more people interested in such leisure. Sport is in third place, with a decline in the age group of 25-35 years. At the same time, only 8% of young people are engaged in shopping, and interest in this type of leisure grows with age. Respondents aged 14-18 practically do not perceive it as leisure, but rather as an obligatory part of everyday life.”



The speaker of the CAF business conference notes that 65% of young people make purchases with their own money, while the percentage of those who independently purchase clothes, shoes, accessories from the age of 20 begins to grow dramatically.

"This is quite interesting data, since the desire for a consumer lifestyle and shopping today are demonstrated as the dominant activities with the widespread use of television, social networks, and other media. The practices of reference social groups are demonstrated: politicians, athletes, artists. All this should encourage the desire of young people to imitate them. However, shopping has not become a daily leisure practice for Kazakhstani young people," Natalia Ospanova, the expert, shares her observations.



Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. Shopping as an independent leisure

How much and for what young residents of the country are willing to pay

Among the types of income, analysts and the authors of the research, the Alvin Market Companies Group, - single out income from their own work (53% of respondents) and pocket money provided by parents. Thus, according to the research, at the age of 14-18, a quarter of young people use pocket money, and already at the age of 25-35, this number includes 7% of Kazakhstanis.



Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. How much do young people in Kazakhstan spend on their leisure time?

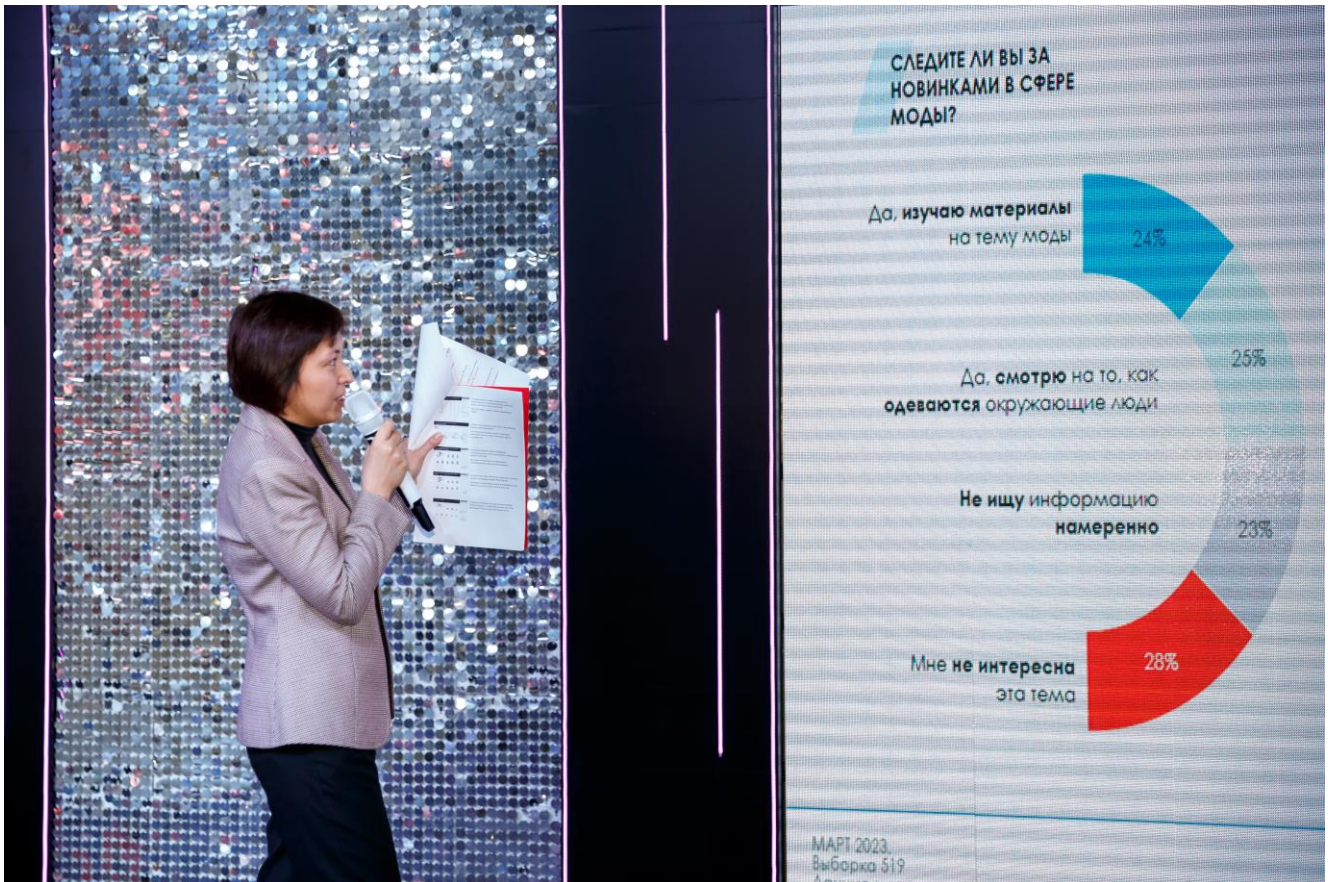
At the same time, about 20% of young people in Kazakhstan prefer mostly free leisure activities. If we talk about the budget that young Kazakhstanis can spend on leisure per month, then this is an average of about 22.5 thousand tenge for urban residents and a little bit less for rural residents. If we divide this budget into weekly expenses, then regardless of gender, the average amount will be about 5.5 thousand tenge.

Favourite fashion shopping destinations and their main drivers

Meanwhile, according to industry research data presented at the CAF business conference, Kazakhstanis become interested in fashion at the age of 14-18.

“At this age, young people are ready to seek information about what is fashionable now, what is not fashionable. At the same time, interest in the topic arises not only among those who have their own money. Almost 50% of young Kazakhstanis surveyed follow the latest fashion trends.

Note that factors such as geography of residence, level of education or availability of work do not essentially affect their desire to be aware of fashion. However, it is a curious fact that some men and part of the rural population are completely indifferent to the topic of fashion,” Natalia Ospanova, the President of the Kazakhstan Association of the Professional Researchers of Public Opinion and Market (KAPIOR), says.



Natalia Ospanova's speech at the CAF business conference.

There is a presentation slide “How much are Kazakhstani young people involved in the topic of fashion?” on the screen

According to the expert speaker, shopping and entertainment centres are the hubs for shopping for clothes/shoes/accessories. Moreover, if we consider the regions, we can see that when choosing a retail outlet, residents of the capitals use a much wider range of sales channels by actively using online channels.

“Different types of online channels also appear here: online stores, marketplaces, social networks,” Natalia Ospanova says. *“The Western region traditionally demonstrates a shortage of shopping and entertainment centres, young people here compensate for the lack of range in specialised stores and online, including through social networks. At the same time, young people in Almaty and Astana make most of their fashion purchases in shopping and entertainment centres, and only then in specialised or online stores.”*

Торговые центры – наиболее востребованные места для покупки одежды и обуви

Где молодежь предпочитает приобретать одежду и обувь?

ГДЕ ВЫ ПРИОБРЕТАЛИ ОДЕЖДУ/ ОБУВЬ ВО ВРЕМЯ ПОСЛЕДНЕЙ ПОКУПКИ?

	ПК	СЕВЕР	ЗАПАД	ЮГ	ВОСТОК	СТОЛИЦЫ
В торговых центрах	46%	40%	34%	43%	59%	59%
В специализированных магазинах	24%	20%	39%	22%	17%	23%
В онлайн-магазинах	15%	12%	15%	13%	13%	23%
На онлайн-маркетплейсах	11%	12%	11%	10%	6%	15%
В фирменных бутиках	11%	5%	6%	10%	15%	20%
На улице / барахолке	11%	2%	8%	16%	10%	10%
Через социальные сети	8%	8%	14%	10%	3%	4%
В аутлетах	5%	3%	8%	5%	0%	6%
В секонд-хендах	5%	4%	7%	2%	11%	6%
Через онлайн-сервисы для продажи/ обмена	4%	9%	2%	4%	4%	1%
Затрудняюсь ответить	5%	21%	0%	5%	3%	0%

Север	Акмолинская Карагандинская Костанайская СКО Область Улытау
Запад	Актюбинская Атырауская ЗКО Мангистауская
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Восток	Абайская область Павлодарская ВКО
Столицы	г. Астана г. Алматы

МАРТ 2023.
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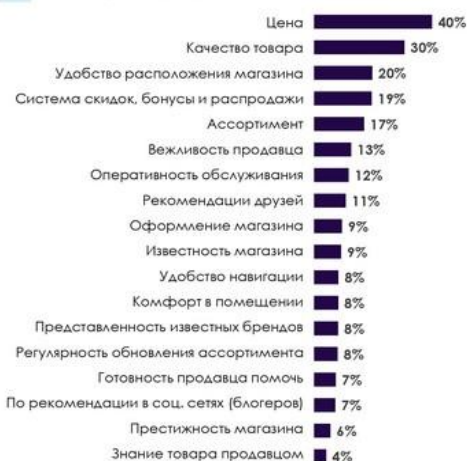
Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. Where do Kazakhstani young people prefer to buy clothes and shoes?

Price and quality factors were the main factors in choosing a store for the surveyed audience. In addition, categories such as convenience of location, politeness of the seller, ease of navigation, comfort of the premises, design, image of the store, brand, and knowledge of the goods by the seller were among those influencing the purchase.

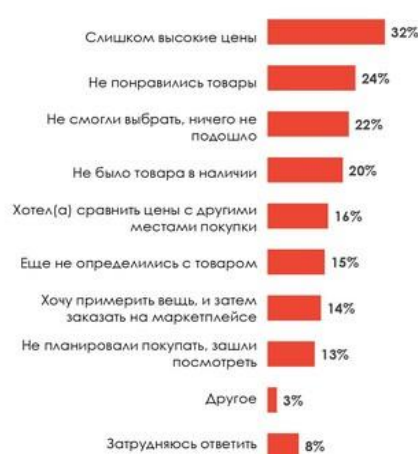
Ценовой фактор играет решающую роль при совершении офлайн покупки

Что влияет на выбор офлайн магазина?

ПО КАКИМ ПАРАМЕТРАМ ВЫ ВЫБИРАЕТЕ ОФЛАЙН МАГАЗИН, МЕСТО ПОКУПКИ?



ПО КАКИМ ПРИЧИНАМ ВЫ ЧАЩЕ НЕ СОВЕРШАЕТЕ ПОКУПКУ В ОФЛАЙН-МАГАЗИНЕ?



ГДЕ ВЫ ПРИОБРЕТАЛИ ОДЕЖДУ/ ОБУВЬ ВО ВРЕМЯ ПОСЛЕДНЕЙ ПОКУПКИ?

В торговых центрах	46%
В специализированных магазинах	24%
В онлайн-магазинах	15%
На онлайн-маркетплейсах	11%
В фирменных бутиках	11%
На улице / барахолке	11%
Через социальные сети	8%
В аутлетах	5%
В секонд-хендах	5%
Через онлайн-сервисы для продажи/ обмена	4%
Затрудняюсь ответить	5%

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Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. What influences the choice of an offline store?

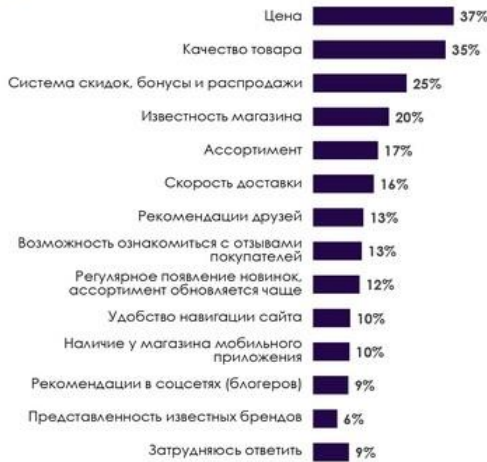
At the same time, price and quality, as well as the inability to try the product on are the main reasons for refusing to buy online and offline.

"We measure the rating of online stores and services on a regular basis, and it is noteworthy where young people began to buy clothes, shoes, and accessories online. We see that Kaspi is taking the lead, and overtaking the historically leading players. Marketplaces such as Wildberries, LaModa, OLX and AliExpress have gone down. At the

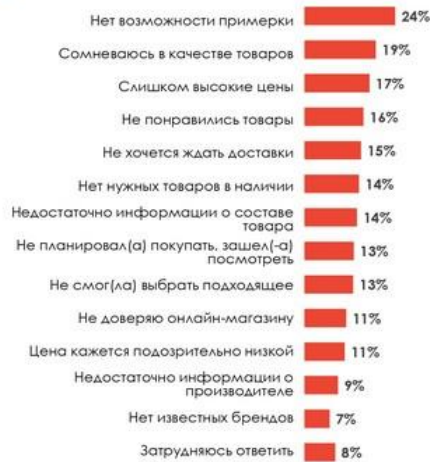
same time, a separate line “purchases in social networks” appeared - and now it is already 6%,” Natalia Ospanova, the speaker of the CAF business conference, reports on the research data.

Цена и качество товаров определяют выбор онлайн магазина

ПО КАКИМ ПАРАМЕТРАМ ВЫ ВЫБИРАЕТЕ ОНЛАЙН-МАГАЗИН?



ПО КАКИМ ПРИЧИНАМ ВЫ ЧАЩЕ ВСЕГО НЕ СОВЕРШАЕТЕ ПОКУПКУ В ОНЛАЙН-МАГАЗИНЕ?



Что влияет на выбор онлайн магазина?

НА КАКОМ САЙТЕ ВЫ ДЕЛАЛИ ПОКУПКУ ОДЕЖДЫ/ОБУВИ В ПОСЛЕДНИЙ РАЗ?



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Slide from the presentation of Natalia Ospanova's speech at the CAF business conference.
What influences the choice of an offline store?

According to the research by Alvin Market, about 20% of young people can be classified as conditional “shopaholics” who make purchases of clothes/shoes/accessories several times a month. A cheque for accessories does not differ much from a cheque for clothes and shoes, and it is noticed that in general men spend more on themselves than girls. In addition, half of the purchases are made spontaneously in the category of accessories.

According to the researchers, young people have a pronounced interest in well-known brands: more than a quarter of young people already buy well-known brands and another half want to have popular brands in their wardrobes. Absolute no name will suit no more than a quarter of young people.

As for clothing styles popular among Kazakhstani young people, sports style and oversize clothes are in the first place. Then the universal classic style follows.

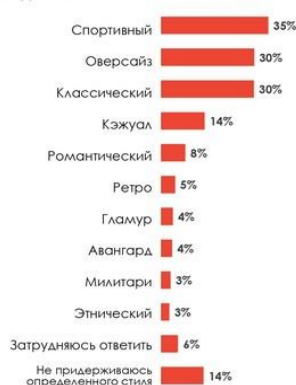
It is noteworthy that 3% of young people are interested in ethnicity, and 40% of respondents already have clothes of Kazakhstani brands in their wardrobe.

Качество, приемлемая цена и натуральные материалы – ключевые требования к одежде со стороны молодежи

ОЦЕНИТЕ, НАСКОЛЬКО ДЛЯ ВАС ВАЖНЫ ПЕРЕЧИСЛЕННЫЕ ФАКТОРЫ ПРИ ВЫБОРЕ ОДЕЖДЫ, Top2 (1..5)



КАКОЙ СТИЛЬ В ОДЕЖДЕ ВЫ ПРЕДПОЧИТАЕТЕ ДЛЯ ПОВСЕДНЕВНОЙ ЖИЗНИ?



На что обращает внимание молодежь при выборе одежды и какой стиль предпочитает?



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Slide from the presentation of Natalia Ospanova's speech at the CAF business conference.
What do young people pay attention to when choosing clothes?

The research conducted among young consumers showed an interesting fact – more and more Kazakhstanis are interested in the services of professional stylists when choosing a fashionable image. Thus, 22 per cent of Kazakhstanis have already received this service for a fee, and another 14 per cent are ready to try shopping with a stylist in the near future. Young Kazakhstanis clearly indicate a comfortable cost for them to work with a fashion consultant – 18,067 tenge for a one-time selection of an image and work with a stylist. Also, Natalia Ospanova, the research expert, notes that there is an indirect demand for luxury brands in the youth segment: 45% of young people are ready to rent clothes from premium brands, a quarter are already buying second-hand luxury clothes, another 39% are ready for premium second hand. As for out-dated clothes, young people mostly give them to their relatives, then either put them in the closet or give them for charitable purposes, and a significant proportion (25%) throw away unwanted clothes.



Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. Do luxury brands have a place in the youth segment?

At the same time, Kazakhstanis, as well as all over the world, are showing a potential interest in virtual shopping. Natalia Ospanova, the speaker of the CAF business conference, notes that industry research data confirms this fact: *“More than 70% of respondents are ready to spend money in the virtual world. Of course, the purchase of real goods comes first, however, in the virtual world young Kazakhstanian people are already ready to try on clothes and hairstyles, get advice from consultants, do joint shopping with friends, try new makeup and beauty products, and even buy digital clothes for their profile picture.”*



Slide from the presentation of Natalia Ospanova's speech at the CAF business conference. What are Kazakhstanis willing to pay for in the virtual world?

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