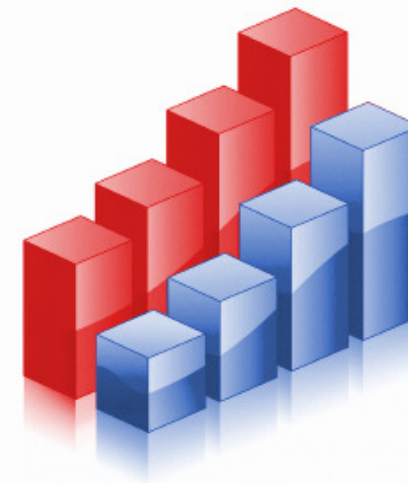


E-commerce in the countries of Central and Eastern Europe: Russia

- free version of the report



March 2007, Warsaw, Poland

 Gemius

 redtram
NEWS SEARCH ENGINE

 Oborot.ru
ИНТЕРНЕТ-СТАТИСТИКА И АНАЛИТИКА

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Additionally, in the paid version of the report the following chapters are available:

- Summary (extended – 9 slides)
- General attitude towards shopping (extended – 19 slides)
- Shopping in online shops (12 slides)
- Shopping on auctions (5 slides)
- Online shops vs. auctions (11 slides)
- Internet users who have never done online shopping (10 slides)
- An appendix concerning results for Internet users aged 15-18 (3 slides)

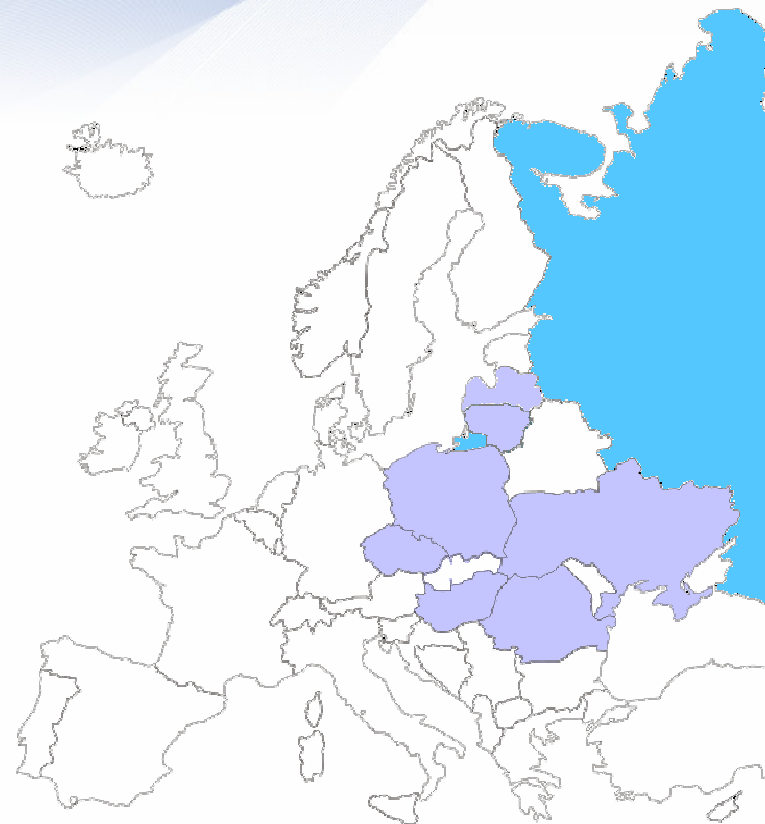
Full version of the report has 81 slides.

Methodological approach

3

Methodological approach

- The research has been conducted in several countries of Central and Eastern Europe:
 - the Czech Republic
 - Hungary
 - Latvia
 - Lithuania
 - Poland
 - Romania
 - **Russia**
 - Ukraine.
- In **Russia**, Gemius conducted the research in cooperation with ru.redtram.com and oborot.ru.



Methodological approach

- The aim of the research was to identify the attitudes and usage preferences of Russian Internet users towards online shopping in e-shops and on auctions.
- The top lines of the report contain:
 - general attitude towards online shopping;
 - the favorite products bought on the Internet;
 - the frequency of shopping on the Internet;
 - the e-shops sites ranking in Russia;
 - attitude towards and usage of e-shops;
 - the auction sites ranking in Russia;
 - attitude towards and usage of auctions;
 - purchase intention of Internet users.

The research was conducted with the use of pop-up questionnaires sent randomly to the Internet users between 19th of October 2006 and 12th of March 2007. The sample of 3 153 respondents was cleaned accordingly with Gemius standard and afterwards weighted using the structural data provided by the report “The Internet in Russia” published by “FOM: Public Opinion Foundation” (autumn 2006 release). The findings are representative in terms of age, gender and frequency of Internet use for the whole Russian Internet population 18-79 years old. Information about sample size presented in the report refers to weighted data.

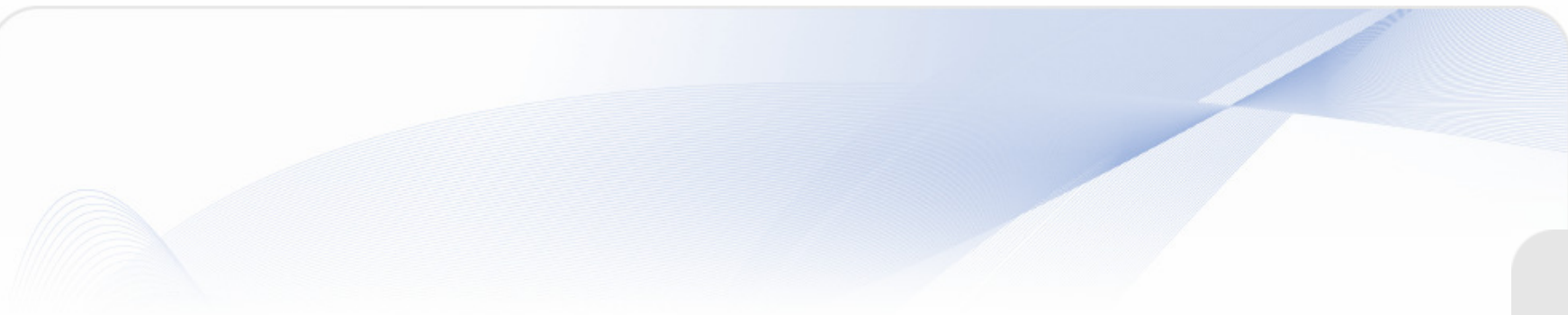
Executive summary

6

Executive summary

The **top lines** of the report show the following:

- In the context of Russian e-commerce, 53% of the Internet users from this country declared to had shopped on the Internet.
- E-shopping is still in the incipient phase of evolution. It is considered risky by 43% of those who heard about online shopping, and the payments are in most cases still made in cash.
- In Russia, online shops are considerably more popular than auctions, therefore the domestic market edged up to 51% for e-shops, whilst auctions maintain a lower level of 7% represented mostly by molotok.ru.
- Unaided brand awareness for e-shops indicates that www.ozon.ru is undisputed leader of online shopping, followed by www.003.ru and www.bolero.ru.



Summary

Summary

GENERAL ATTITUDE TOWARDS SHOPPING (I)

- **The positive attitude towards shopping** in general (54% of Internet users love or like shopping), in tandem with the great awareness of online shopping (98%) is featuring the potential of the e-commerce market in Russia. When buying online, Russians are concerned about the quality of the products (36%), spending time in a pleasant way (24%), saving money (15%) and time (11%).
- **Search engines** (65%) and **offers of different online stores** (24%) are the favorite sources of information when looking for a product on the Internet.
- **Internet is the preferred media** when looking for:
 - phones and GSM accessories (43%);
 - consumer electronics and domestic appliances (38%);
 - computers software (36%);
 - computer hardware (35%);
 - train, bus, plane tickets (31%);
 - photo equipment (31%);
 - books, CD, films (31%).

Summary

	ONLINE SHOPS	AUCTIONS
REASONS FOR PURCHASING USING PARTICULAR ONLINE CHANNEL	saving time (60%) possibility of ordering at any time (57%)	goods that are more difficult to be found in some other place (52%) lower prices than in traditional shops (43%)
ADVANTAGE OF SHOPPING : ONLINE SHOPS VS. AUCTIONS	easier procedures (30%) objects ordered and received are the same (26%)	lower prices (38%) more detailed descriptions of products (37%)
PROBLEMS	long product delivery time (37%) false information on the website (23%)	long product delivery time (28%) lack of important information while shopping (21%)
MOST POPULAR PRODUCTS BOUGHT	books, CDs, films (55%) consumer electronics and domestic appliances (47%) phones and GSM accessories (36%)	books, CDs, films (38%) phones and GSM accessories (36%) computer hardware (32%)
MOST POPULAR WAY OF PAYING	in cash at delivery (83%) bank transfer (17%)	in cash at delivery (66%) payment service (28%)

General attitude towards online shopping

11

General attitude towards online shopping

Q1. General attitude towards shopping

Q2. Most important criteria when buying

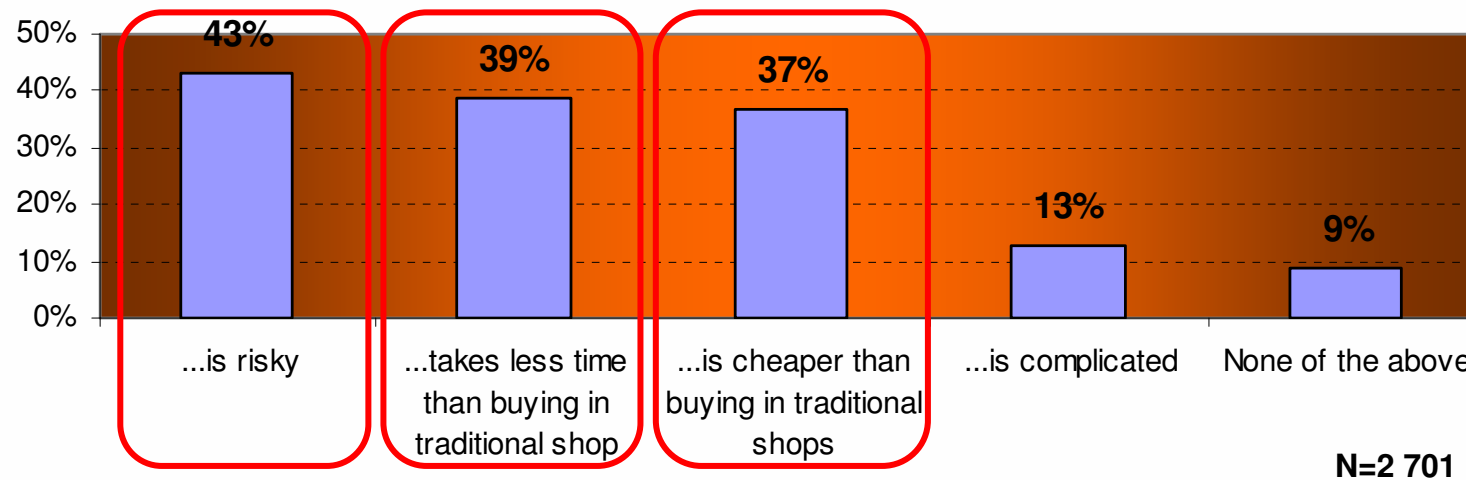


QUALITY OF PRODUCTS (36%)	I	SPENDING TIME IN A PLEASANT WAY (24%)	II
SAVING MONEY (15%)	III	SAVING TIME (11%)	IV

Note: in some cases percentages may not add up to 100 due to rounding

General attitude towards online shopping

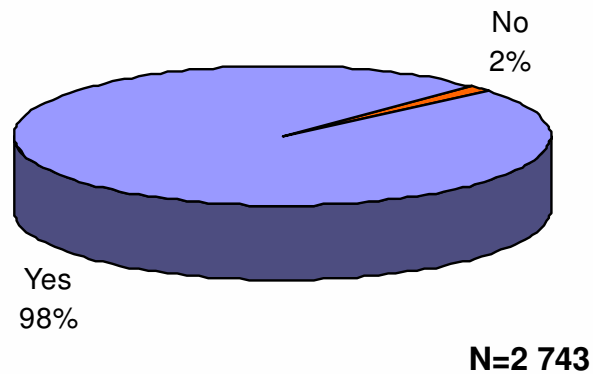
Q5. Internet users' opinion about buying on the Internet



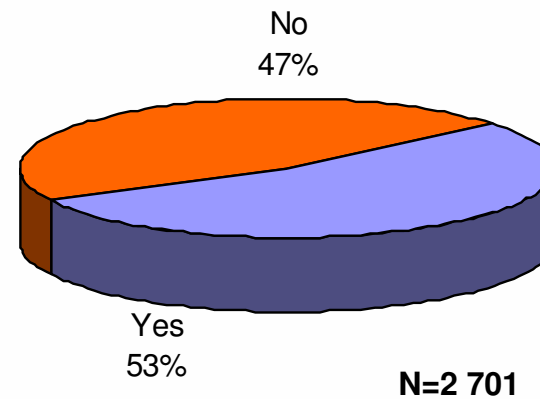
The most prevalent feature associated with e-shopping is the lack of security for the transactions made on the Internet. This negative feature is ranked ahead the positive opinions that e-shopping saves your time and money, when compared to traditional shops.

General attitude towards online shopping

Q4. Ever heard about online shopping



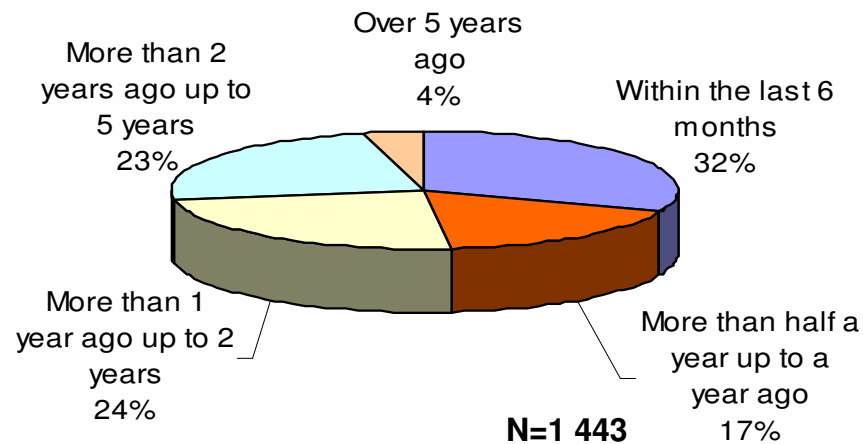
Q6. Ever done online shopping



The awareness of online shopping is very high in Russia, but the actual purchase is done by slightly more half of those who have heard about such possibility.

General attitude towards online shopping

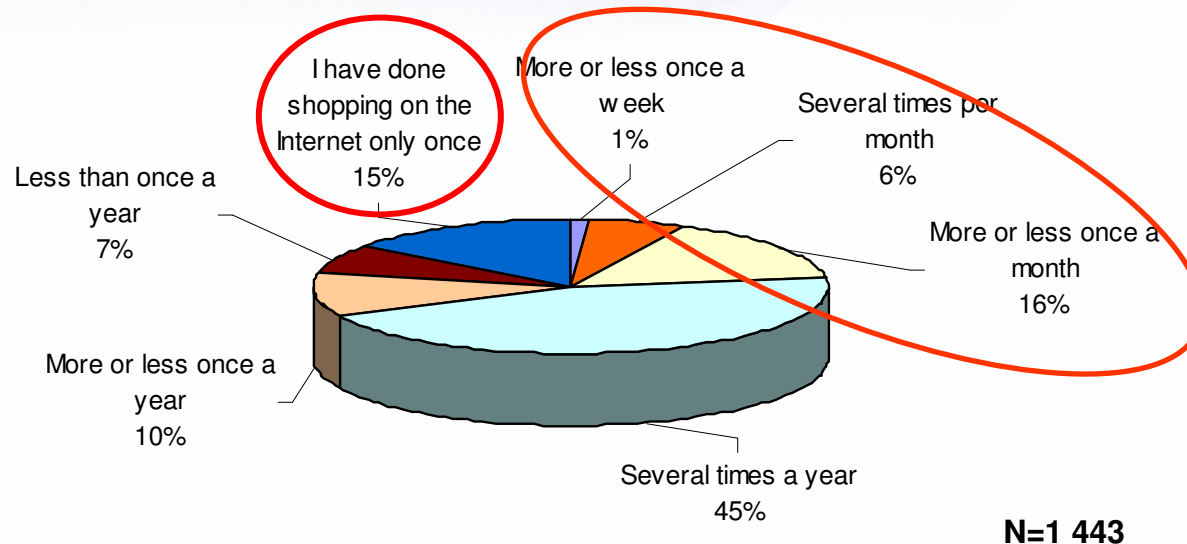
Q7. History of using the online shopping



Among Internet users who have ever done online shopping, the shoppers with over 1 year of e-commerce experience are accounting for more than half.

General attitude towards online shopping

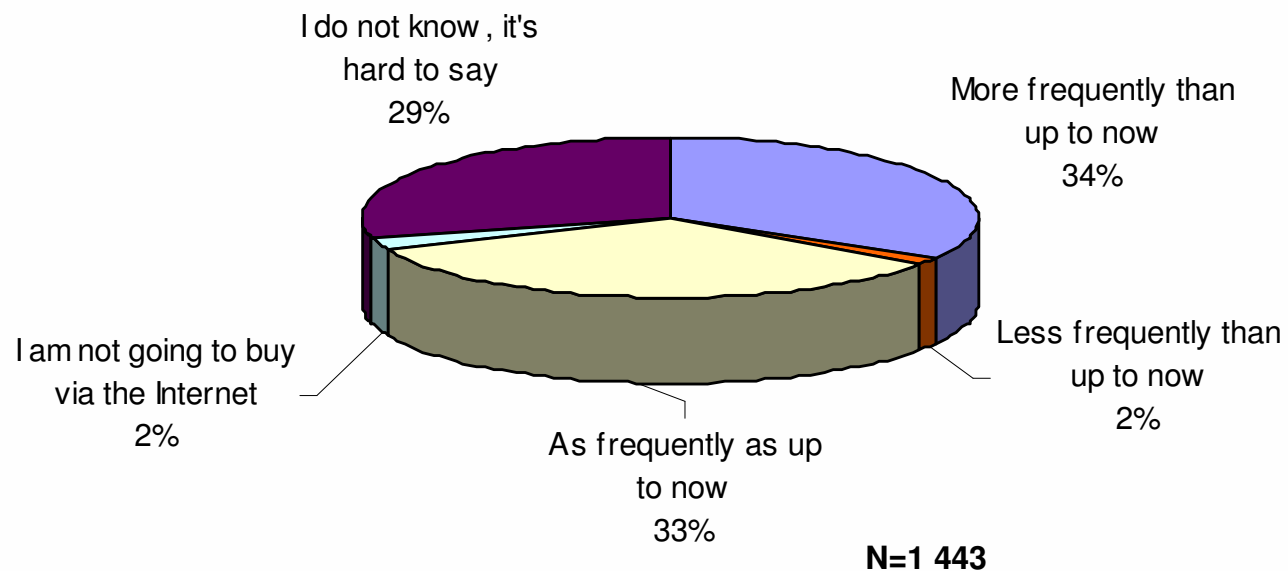
Q8. Frequency of doing online shopping



Online shoppers who are purchasing on the Internet several times per year constitute a major share of shoppers (45%) followed by those who shop on the Internet more often (23%). 15% have bought on the Internet only once.

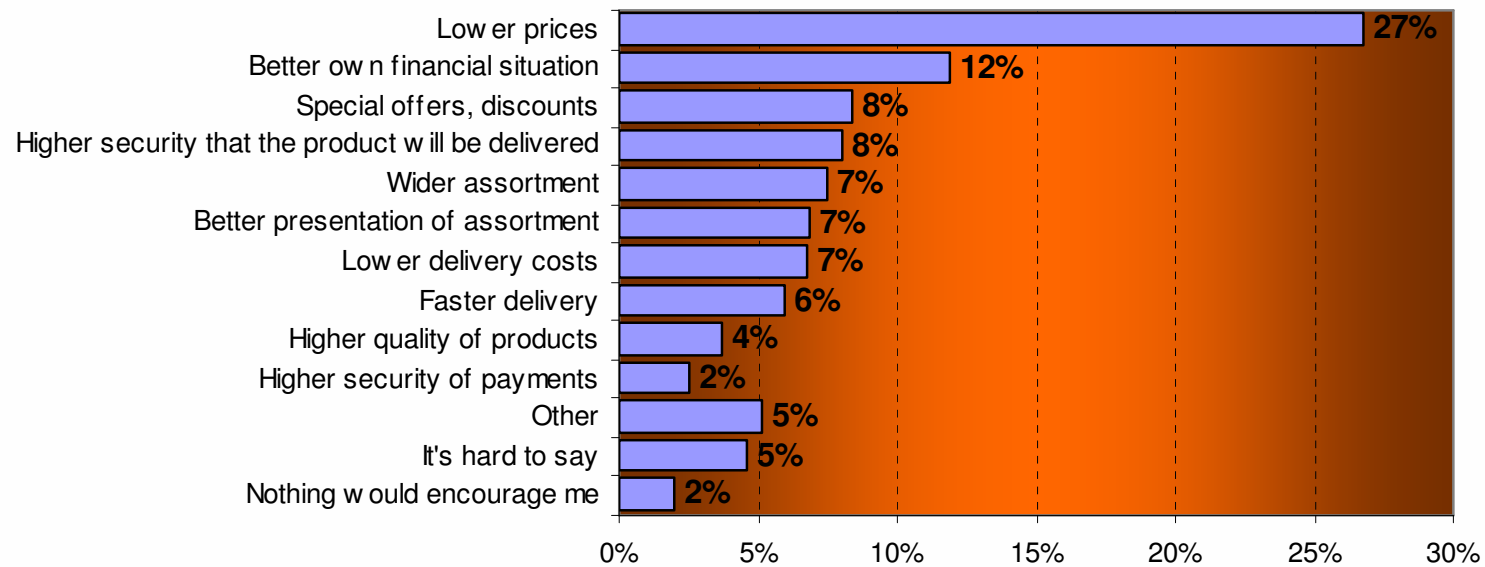
General attitude towards online shopping

Q12. Intention to purchase in the future

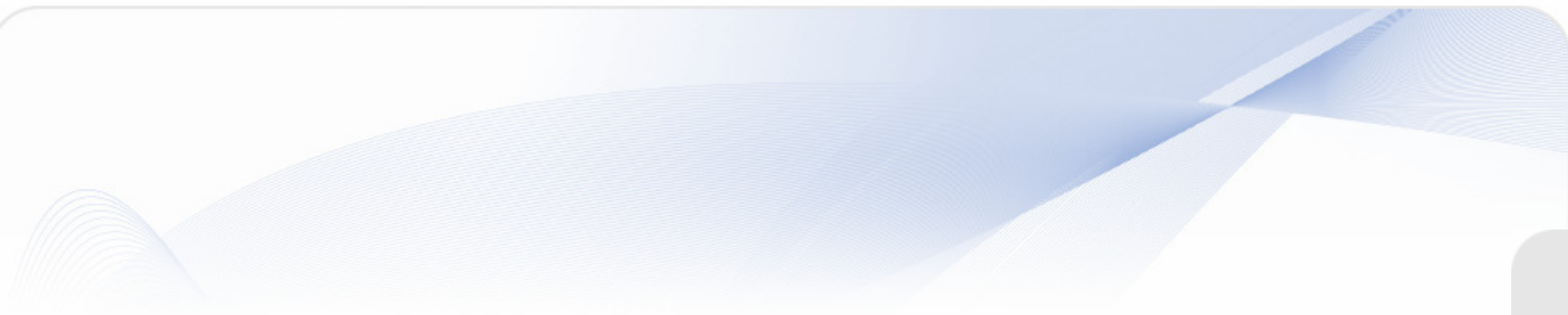


General attitude towards online shopping

Q13. What would make e-shoppers buy more frequently



N=1 443



Demographics

Demographics

WORKING STATUS

N=2 743

I am a student	18%
I work	71%
I am a pensioner	2%
I am unemployed	2%
I am a housekeeper	3%
Other	4%

INCOME

N=2 743

No income	6%
Less than 5,000 RUR	7%
5,001-10,000 RUR	14%
10,001-15,000 RUR	16%
15,001-20,000 RUR	17%
20,001-30,000 RUR	14%
30,001-45,000 RUR	8%
Above 45,000 RUR	6%
Refuse to answer	11%

GENDER

N=2 743

Female	45%
Male	55%

MARKET SIZE

N=2 743

Rural areas	2%
Less than 100 thousand	6%
500 thousand - 1 million	12%
100-500 thousand	12%
Over 1 million inhabitants	11%
Moscow or Saint Petersburg	58%

EDUCATION

N=2 743

Primary	0,4%
Incomplete secondary	2%
Secondary	6%
Secondary vocational	15%
Incomplete higher	25%
Higher	48%
MBA student	1%
PhD and higher	4%

AGE

N=2 743

18 to 24 y.o.	37%
25 to 34 y.o.	27%
35 to 44 y.o.	18%
45 to 54 y.o.	14%
55 to 79 y.o.	4%

Demographics

N=2 743

FREQUENCY OF INTERNET USAGE

Every day	35%
3-5 times a week	53%
1-2 times a week	9%
1-3 times a month or less often	3%

N=2 743

TYPE OF CONNECTION

Modem/ dial-up connection	22%
Broadband connection	66%
Others	3%
I do not know	8%

N=2 743

HISTORY OF USING THE INTERNET

Half a year or shorter	9%
Between half a year and a year	7%
More than 1 up to 2 years	17%
More than 2 up to 5 years	34%
Over 5 years	33%

Contact

Gemius Russia

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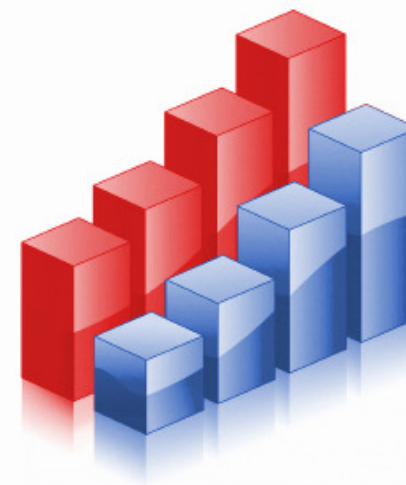
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