

Multi-Category Online Retailers: The State of Russian Market



with support of



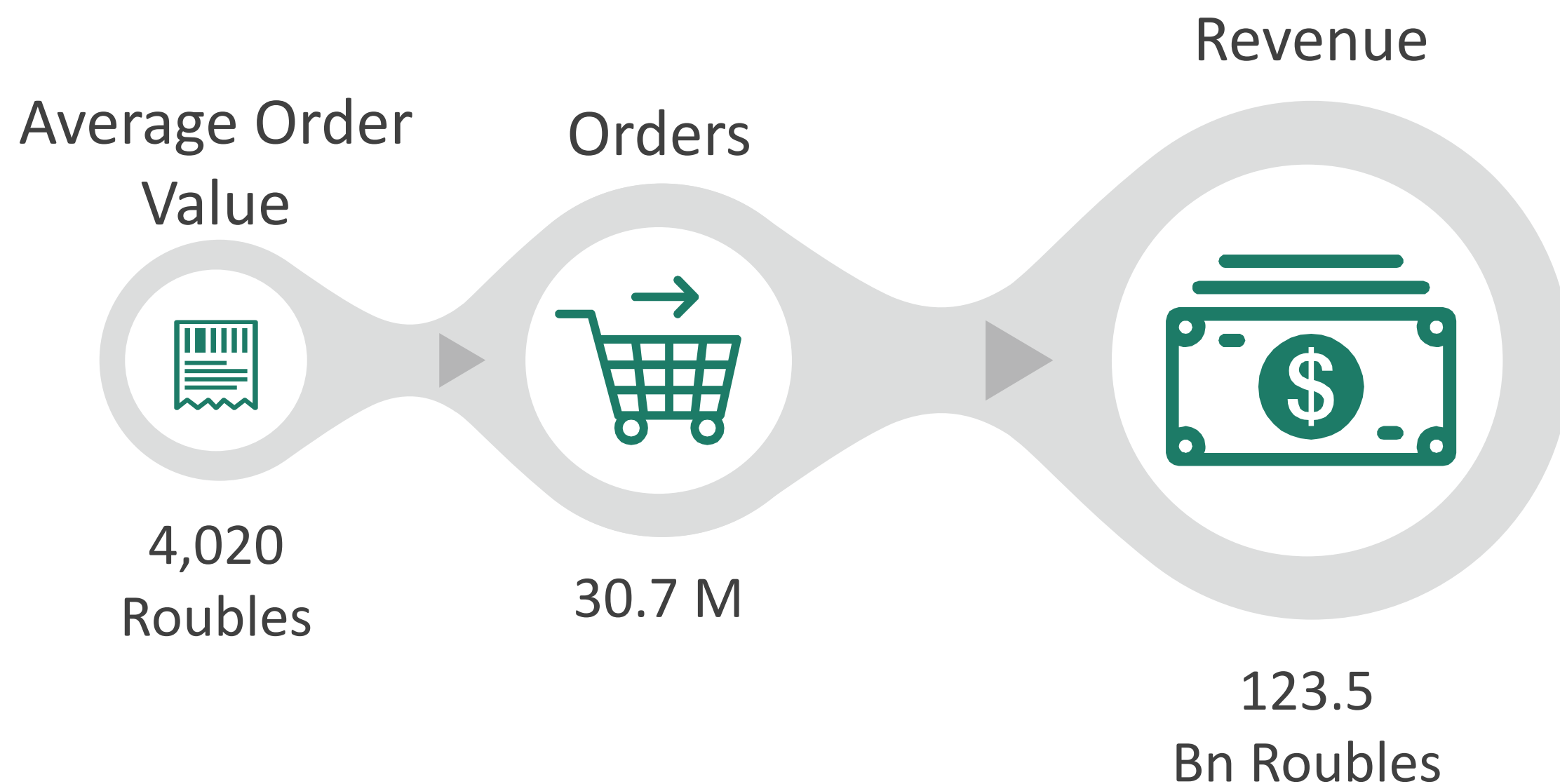
Research Methodology

1. The study examines the online market of multi-category online stores - a store that sells products from various categories, each occupying less than 2/3 of the store's total sales.
2. An online store is a website where users can place orders by filling out a form or by adding products to a virtual cart.
3. The report covers online sales from Russian retailers (i.e. through websites and apps owned or operated by Russian legal entities) and does not include inbound or outbound crossborder sales.
4. Statistics on the number of orders and sales volume is based on data from the 1000 largest (by the number of orders) Russian online stores in 2018. Estimates for number of online orders are based on DI regular monitoring of online retailers and on data, provided by retailers themselves or found in the public domain.
5. We used automatic parsing to determine which third-party services were used by online stores. For difficult cases, we layered in manual analysis.



Key Figures

Multi-Category Online Stores Market Size

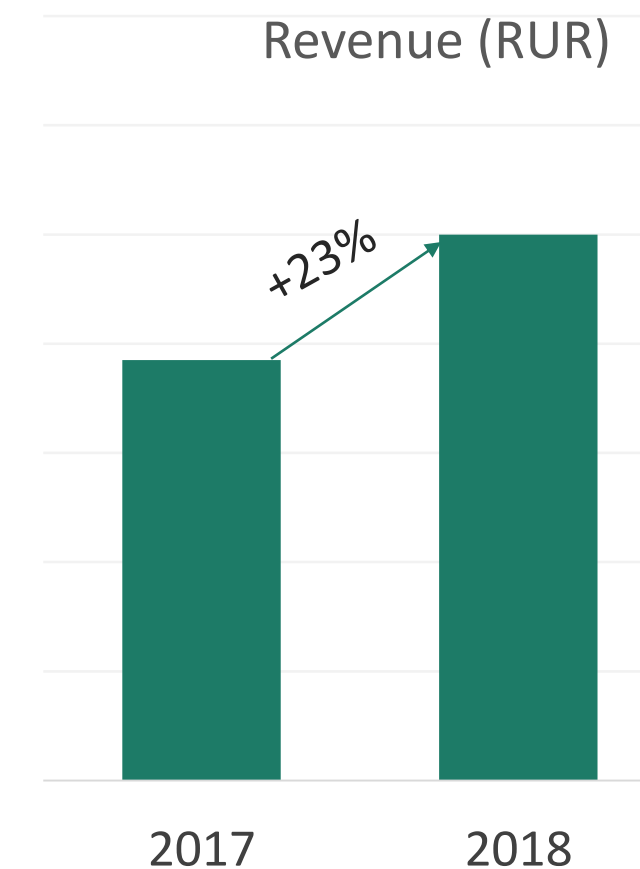
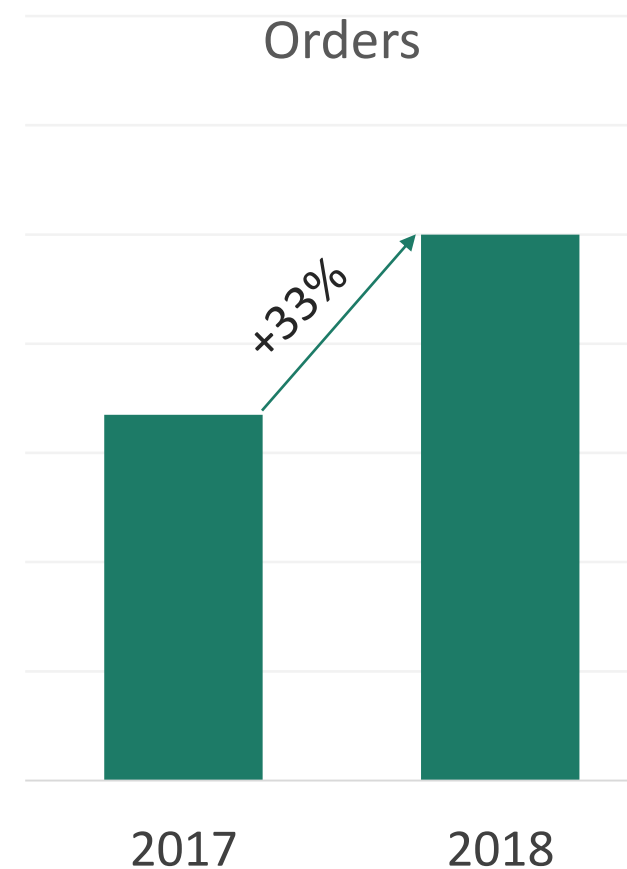


In 2018, online multi-category stores in the TOP 1000 received **30.7 million orders** amounting to **123.5 billion roubles**. The average order value (AOV) was **4,020 roubles**.



Market Dynamics

In 2018, the number of orders made in online multi-category stores rose by **33%**, and the amount of online sales increased by **23%**. AOV in roubles fell by **7%**.



Number of
orders



Revenue



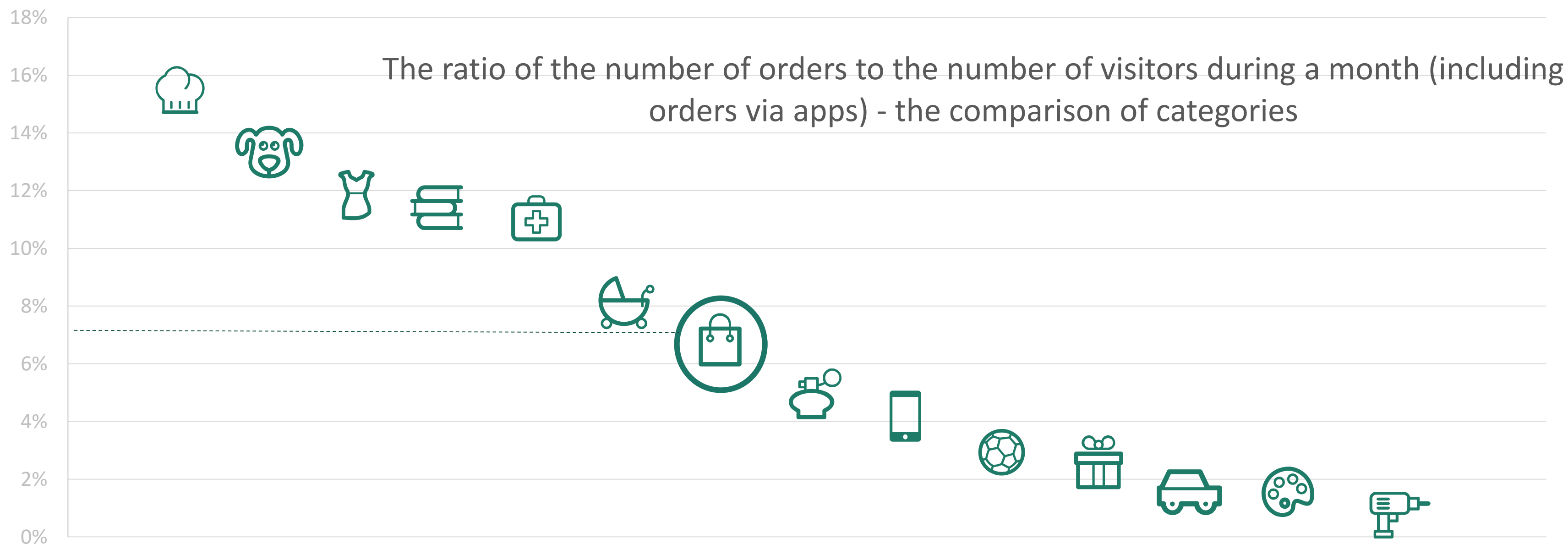
The Share of Multi-Category Stores in the eCommerce Market

In 2018, **11%** of all online orders* took place in online multi-category stores, representing a share in overall revenue of **11%**.

* of the largest 1 000 online retailers

The Conversion Rate of Online Stores

In the multi-category stores, the conversion rate was **7.2%**. This rate is between the rates of cosmetics (4.6%) and children's goods (8.4%).





Sector Composition



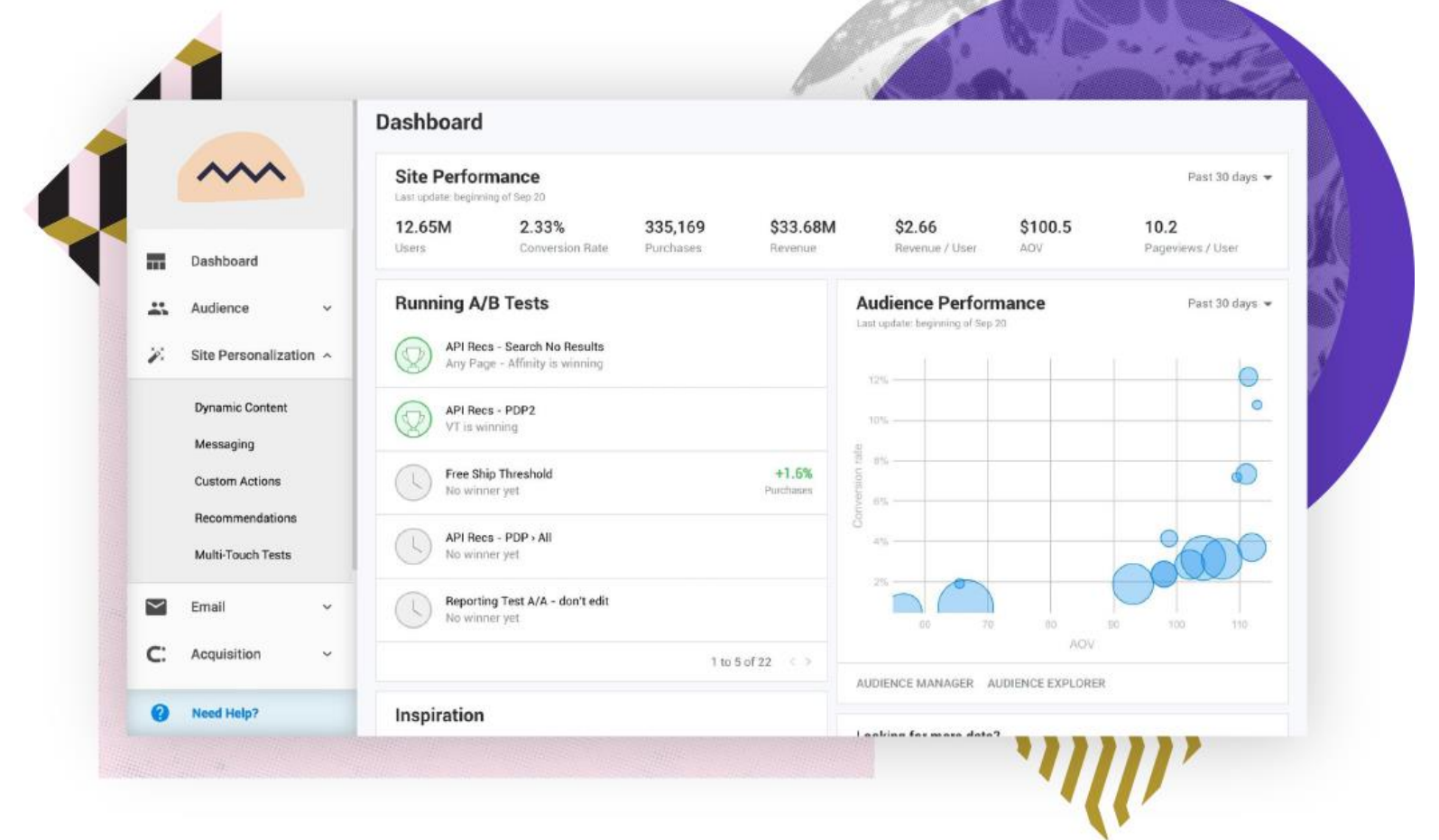
Bring true personalization from vision to reality

Delivering a great customer experience starts with a deep understanding of how individuals interact with your brand. Ultimately, that information is the key to unlocking growth for your business. But without being able to access and action your data, tailoring custom experiences is simply out of reach, as are the customers with which you wish to connect.

With Dynamic Yield, the power to personalize at the right moment, in the right context, and across every touchpoint lives in one, unified platform.

The age of manual experience delivery is over. Let advanced algorithms continuously optimize and serve the best experience to each user. Drive personalization based on clicks, conversions, purchases, or any other KPI you choose.

[GET STARTED WITH PERSONALIZATION →](#)



One platform to personalize all customer touchpoints:



Customer Data Management

Unify customer data across all digital touchpoints, both online and offline.



Personalization & Targeting

Target shoppers with personalized content at the right time.



Testing & Optimization

Continuously A/B test and optimize experiences with machine learning.



Behavioral Messaging

Create targeted overlays and notifications that inspires action.



Product Recommendations

Recommend only the right products throughout the entire user journey.

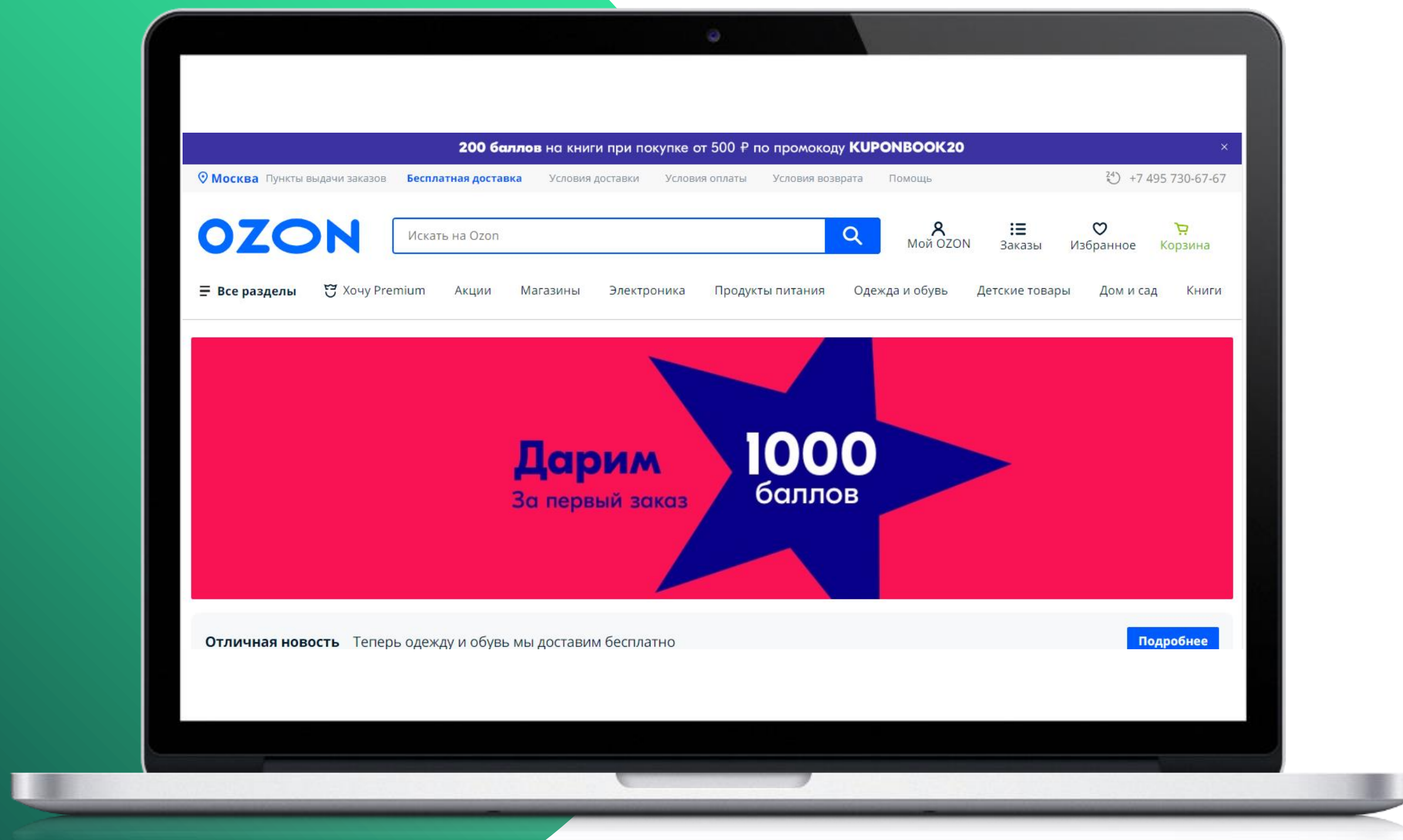
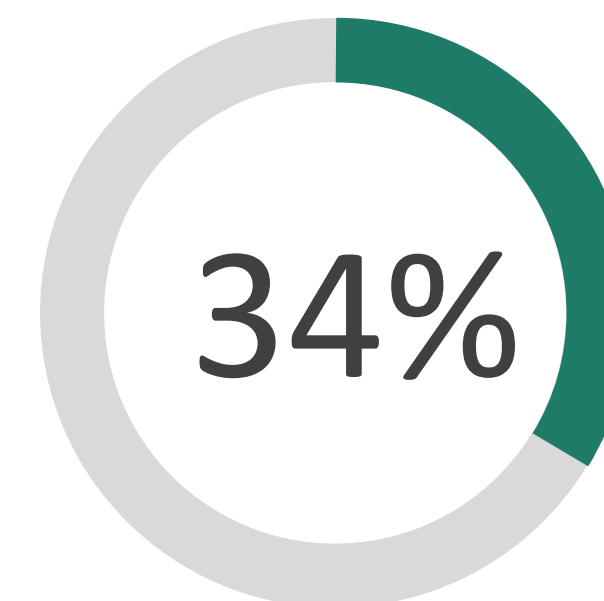


Triggering Engine

Trigger behavioral emails and push notifications to reduce abandonments.

Key Player Ozon.ru

Ozon's share among the **top 1000** online multi-category stores in 2018 was:





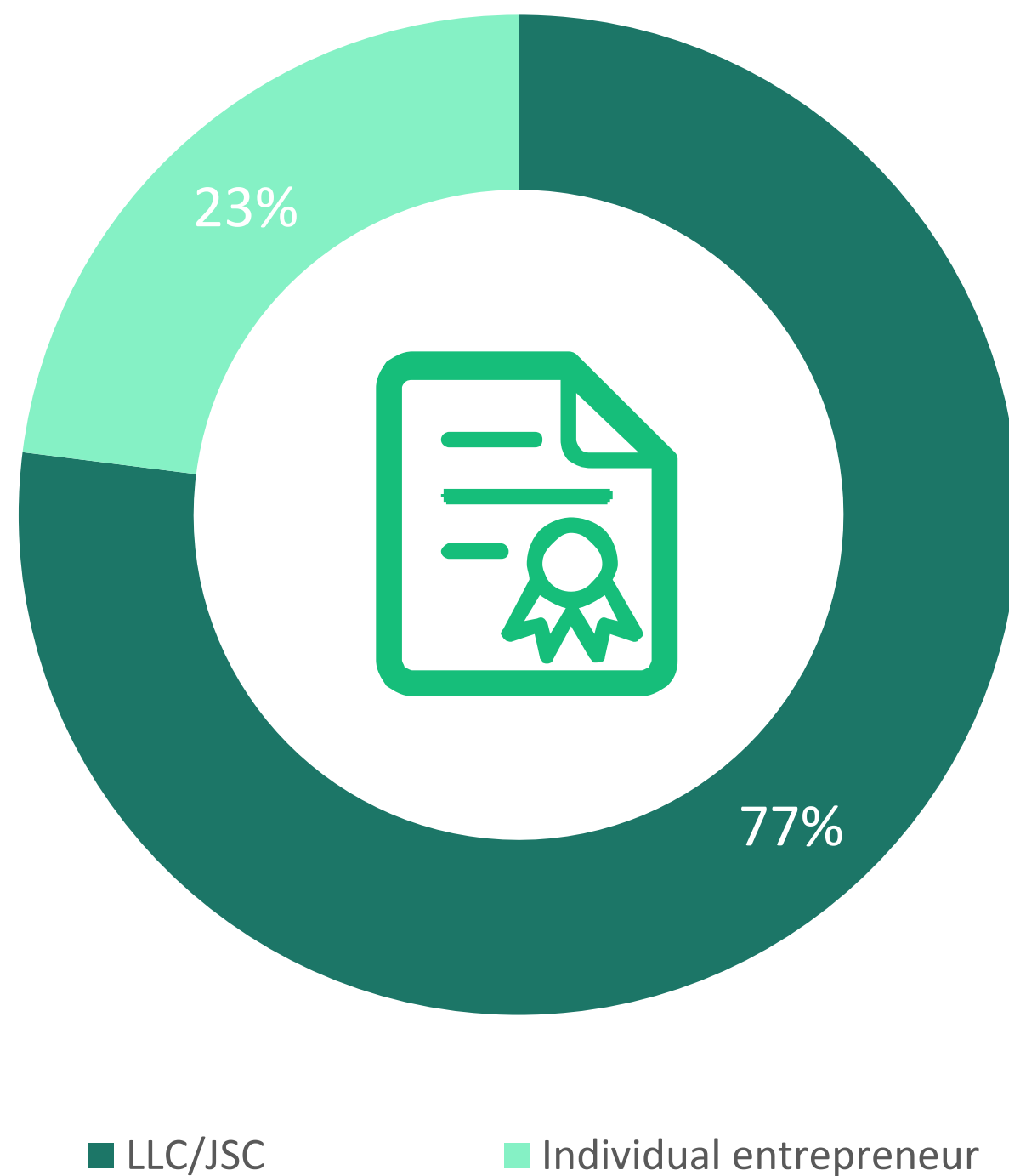
TOP 10 Market Players*

- OZON** Ozon.ru
- ОНЛАЙН ТРЕЙД РУ** Onlinetrade.ru
Покупай всё онлайн
- ULMART.RU** Ulmart.ru

Other online stores in Top 10**:

www.123.ru беру! КОТОФОТО онлайн-гипермаркет RBT.ru real brand technics СИМА ЛЕНД ТЕРПОРТ Tmall

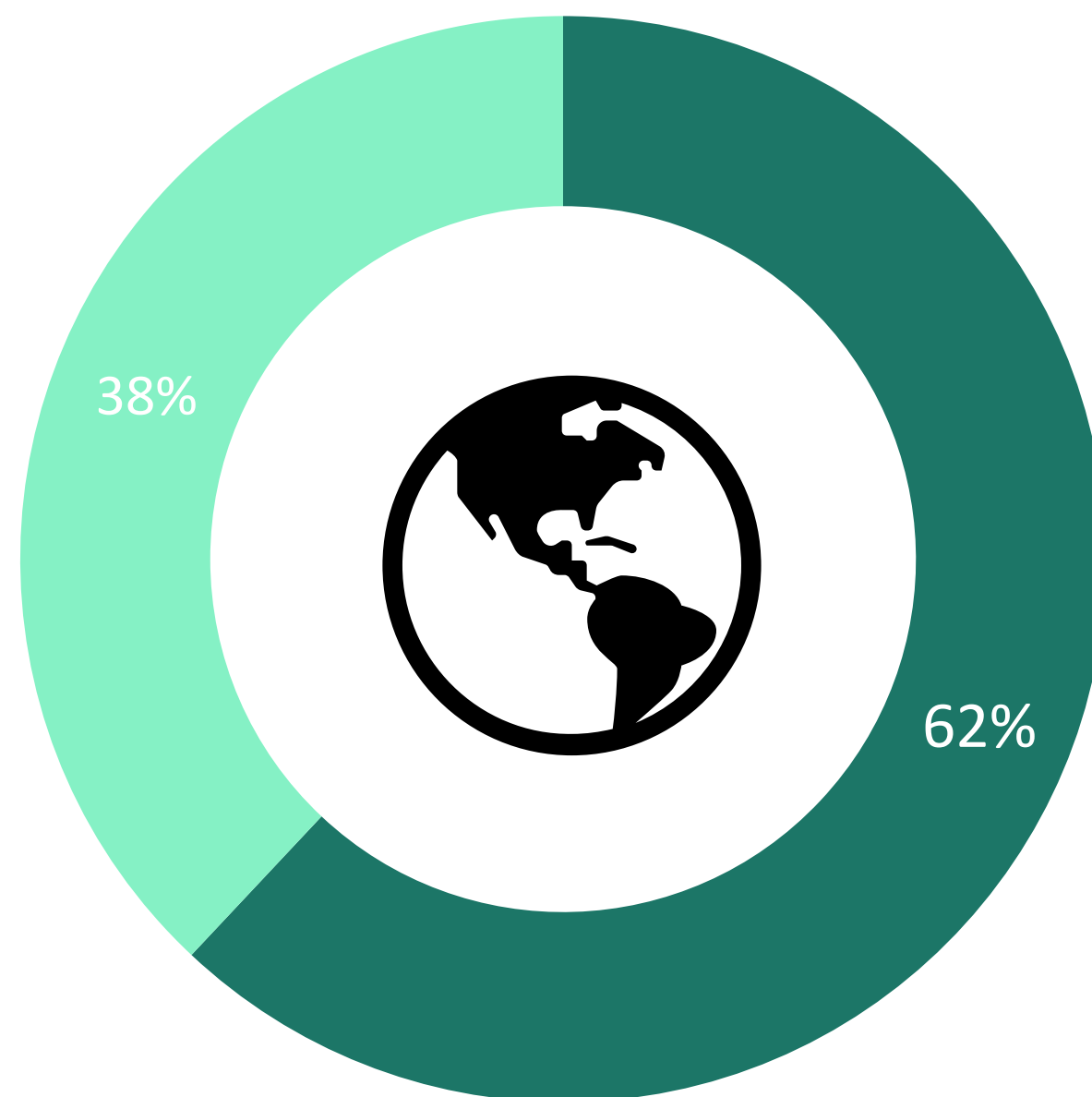
* According to online sales
**In alphabetical order



Retailer Composition

77% of the multi-category online retailers* are companies (LLC/JSC). 23% can be attributed to individual entrepreneurs.

* Sample includes 49 online retailers - all multi-category retailers from top 1000 Russian online retailers



■ Moscow and Moscow region

■ Other Russian regions

Online Store Geography*

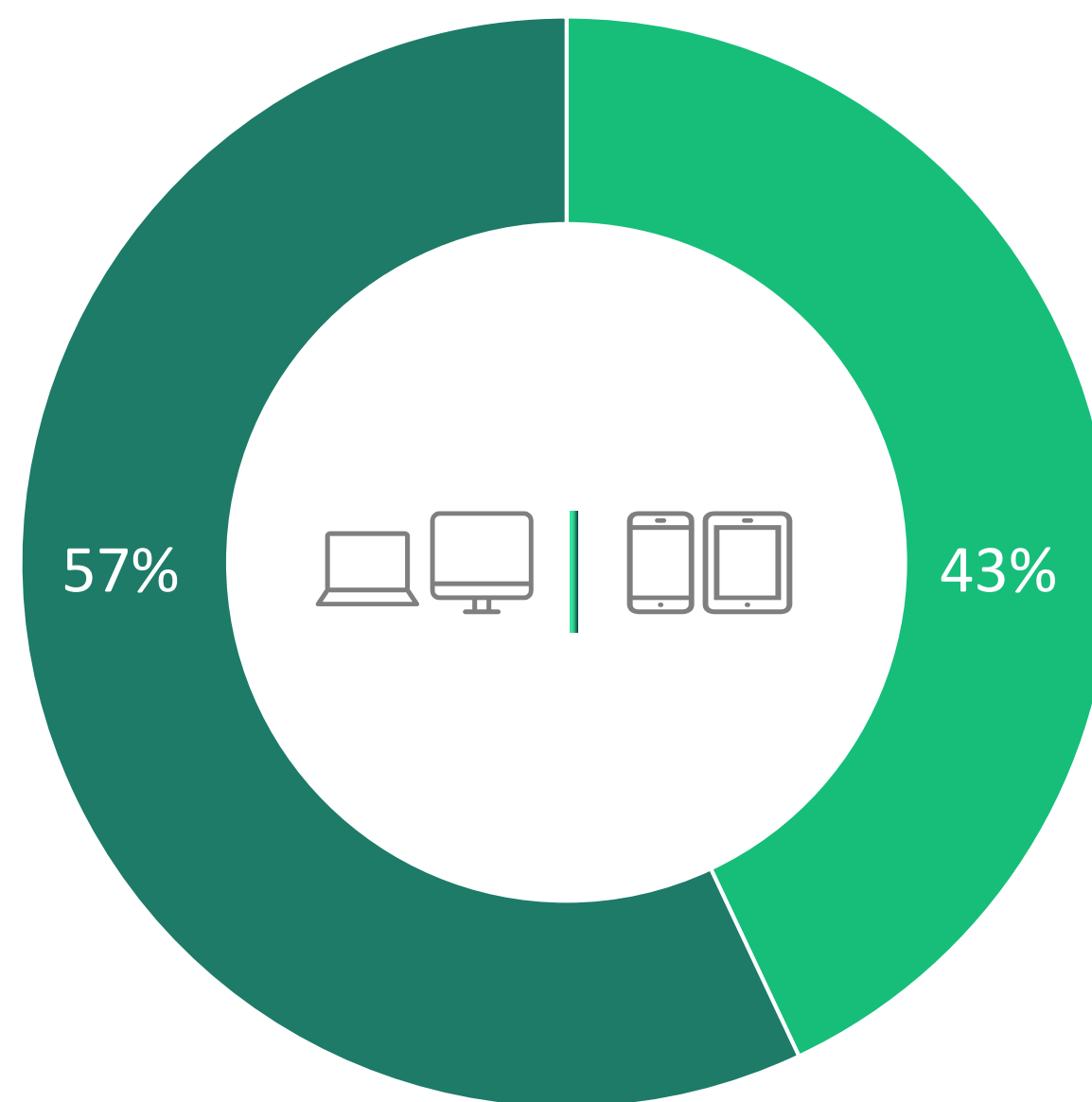
62% of the 1,000 online multi-category stores have been registered in Moscow or the Moscow region. 38% are in other Russian regions.

* According to the place of legal entity registration



Mobile Commerce

Desktop vs Mobile



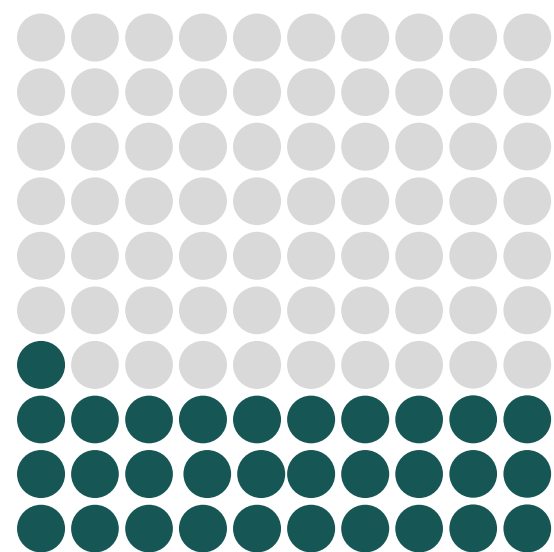
Customers are more likely to use desktop devices than smartphones and tablets to visit online multi-category stores.



Mobile Apps

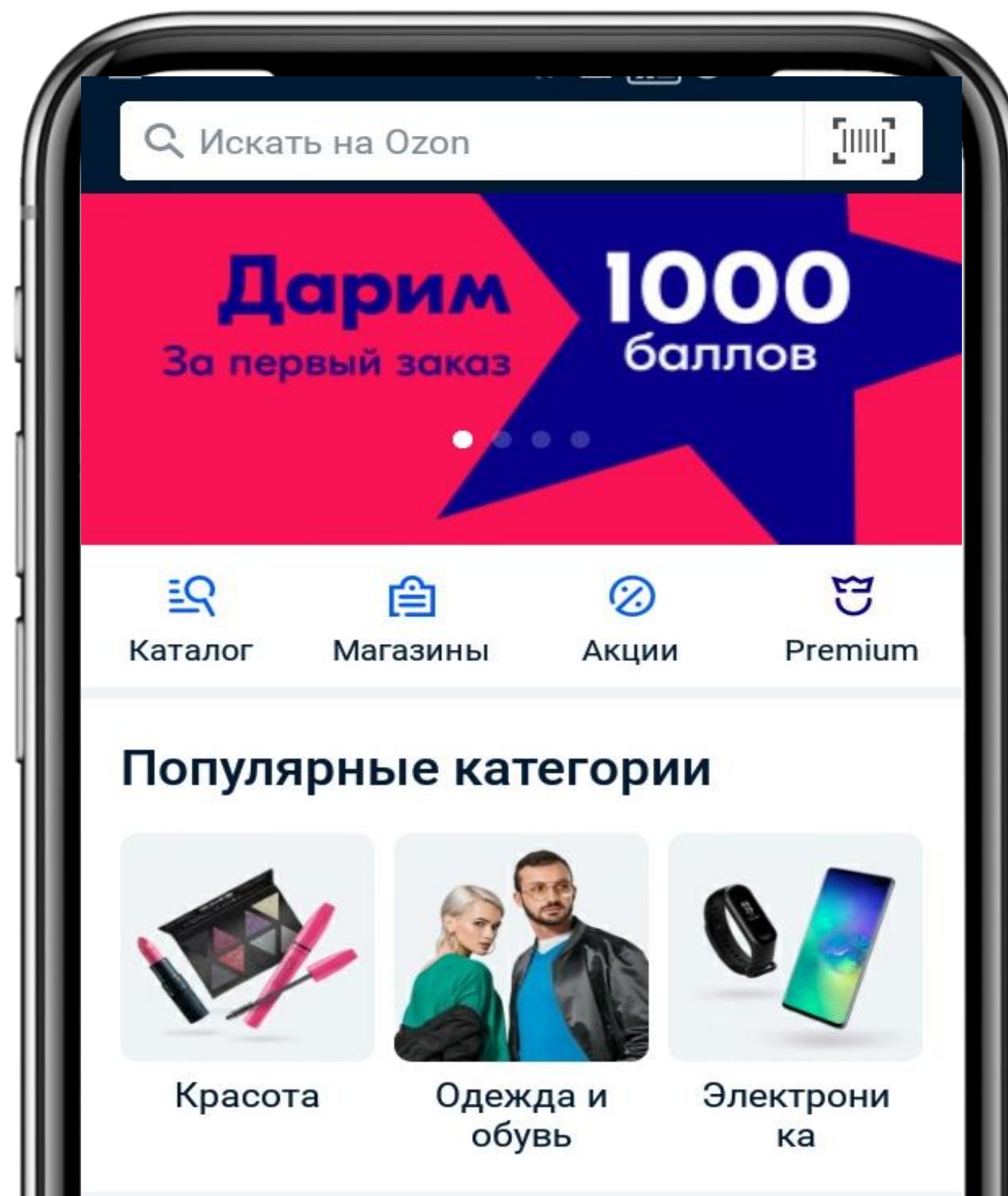
The most popular app is Ozon.ru – over 10M installs in Google Play.

31%

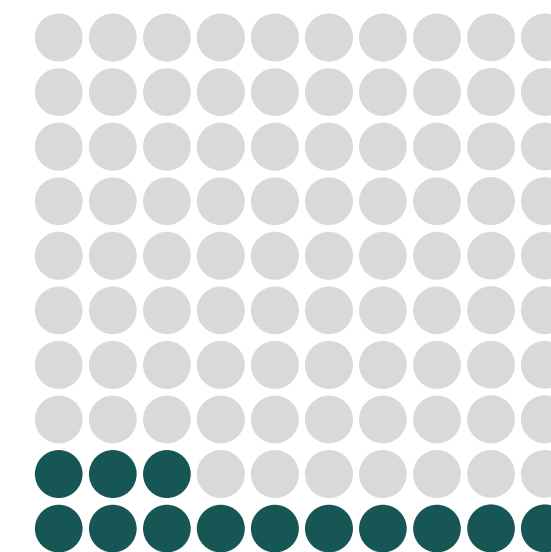


Share of online multi-category stores with apps in the **Google Play Store**

Ozon.ru application →



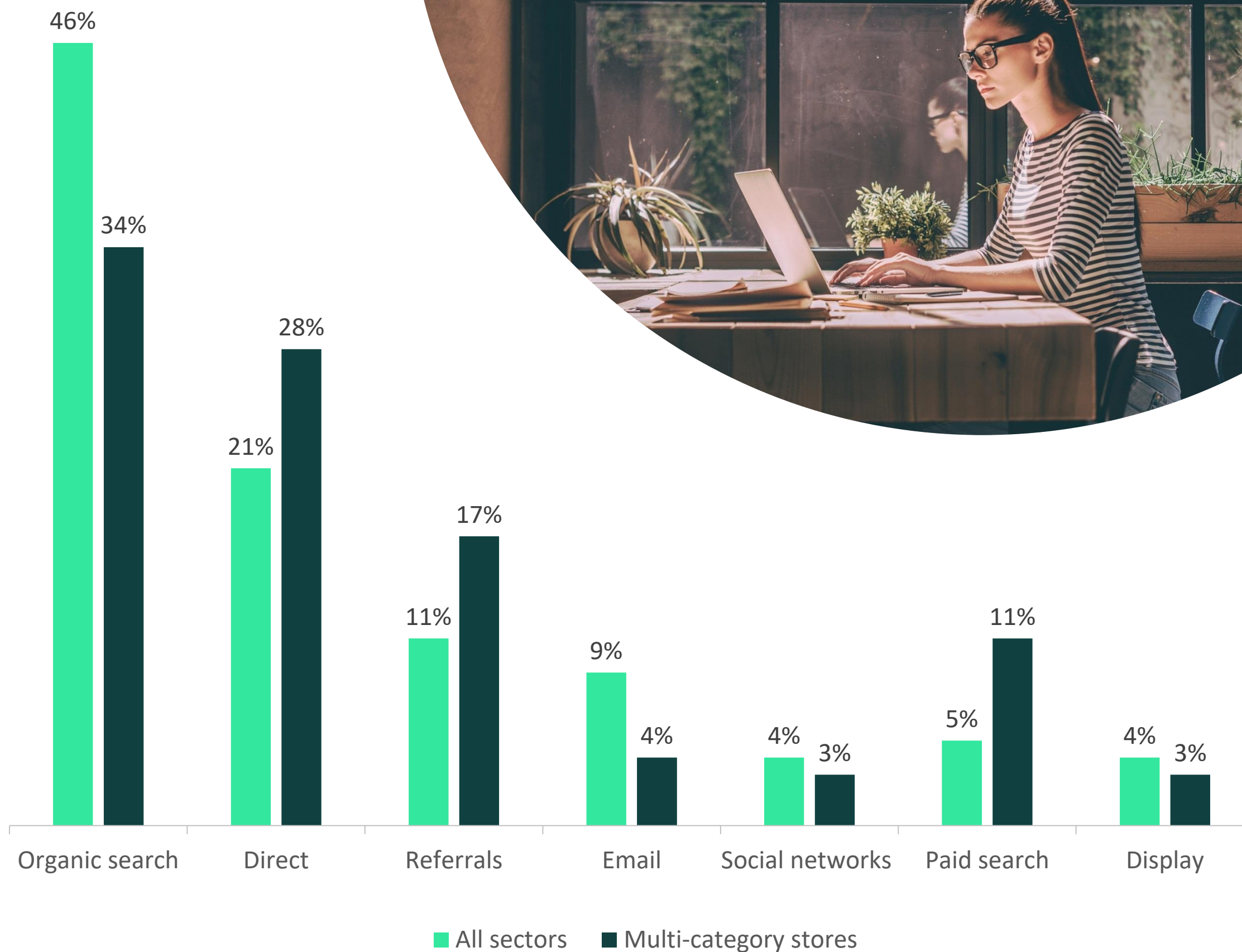
13%



Share of online multi-category stores with apps in the **iOS App Store**



Promotional Channels



Share of Traffic

Share of paid search visits to online multi-category stores is two times higher than average.

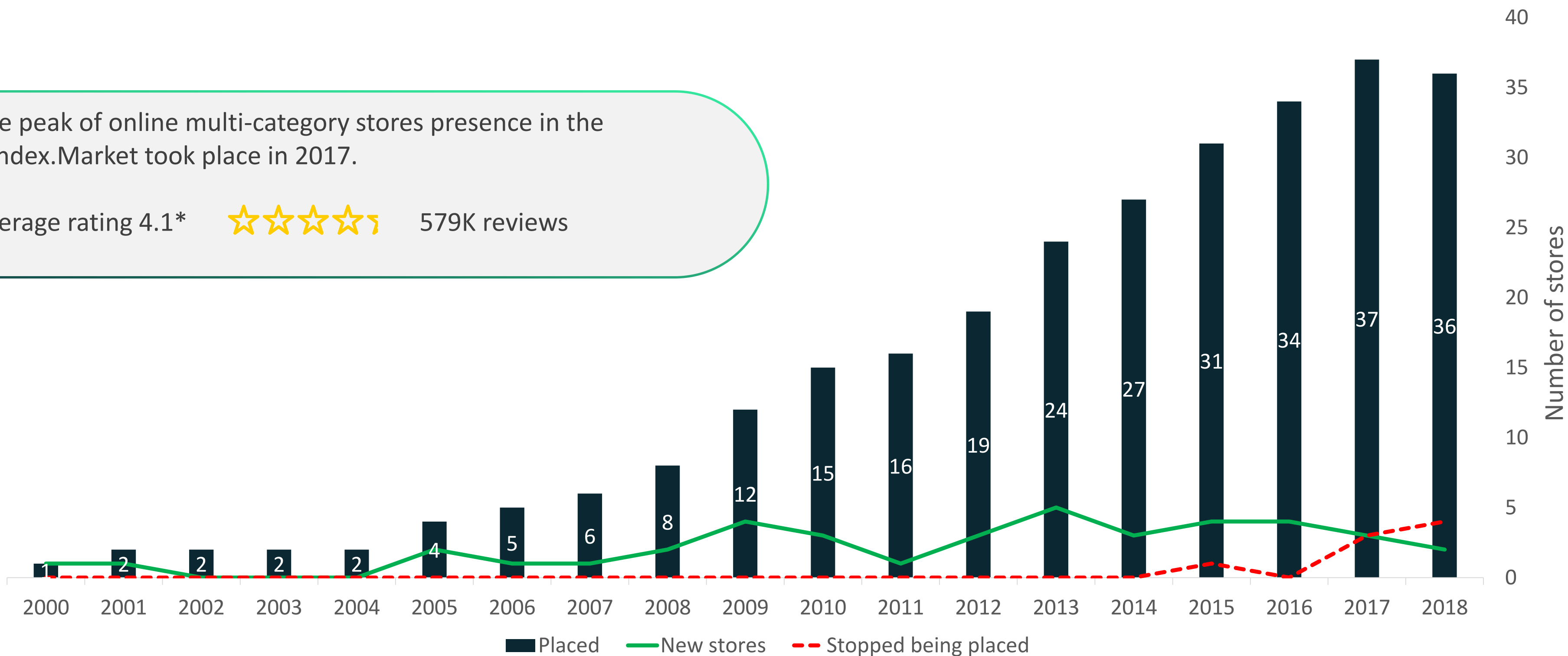
Presence in the Yandex.Market

The peak of online multi-category stores presence in the Yandex.Market took place in 2017.

Average rating 4.1*



579K reviews

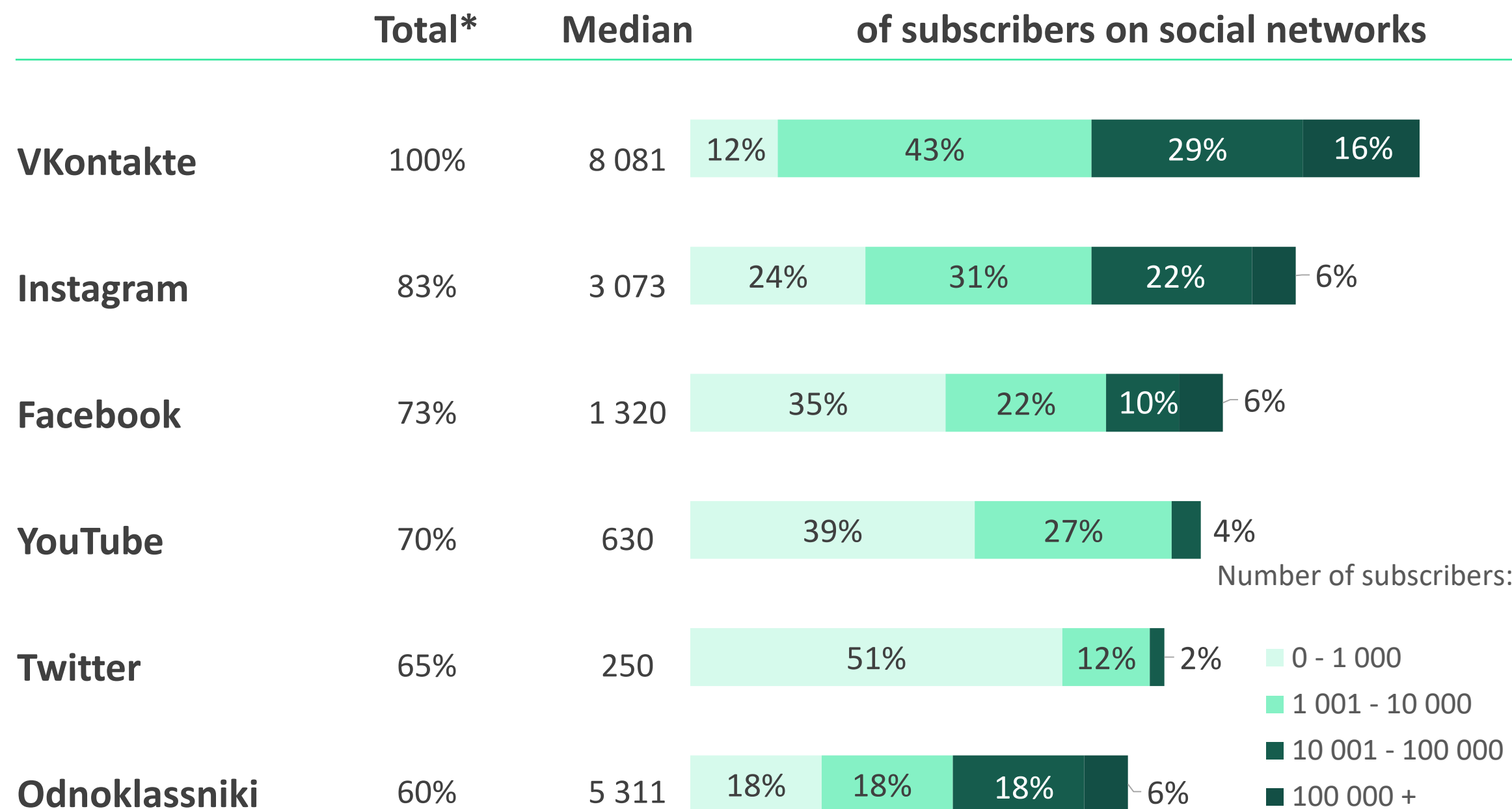


* average rating for all reviews on Yandex.Market in May 2019

Social Networks Activity

The most popular social network for multi-category stores is VKontakte. All stores have active accounts on VKontakte, 16% of which have 100,000+ subscribers.

Distribution of online stores by the number of subscribers on social networks

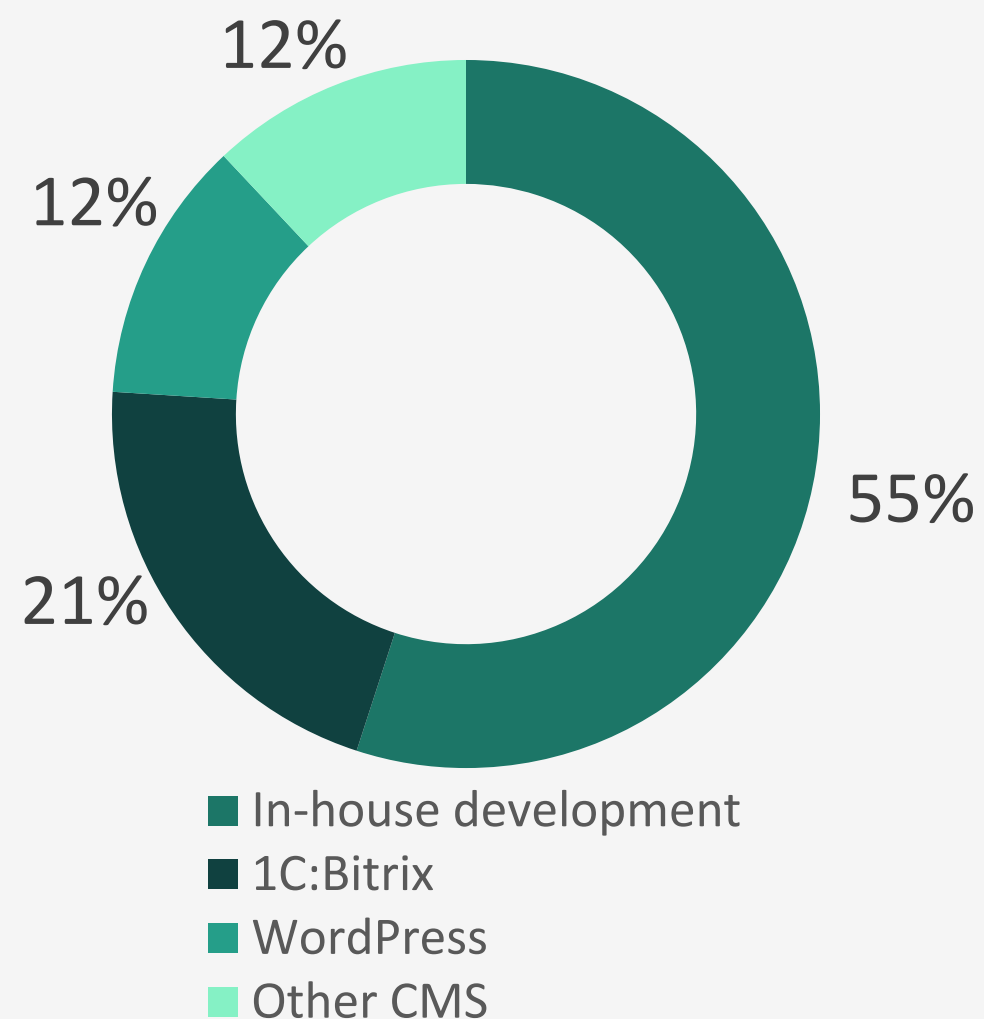


*The percentage of online stores using the respective social network and median of number of subscribers specified



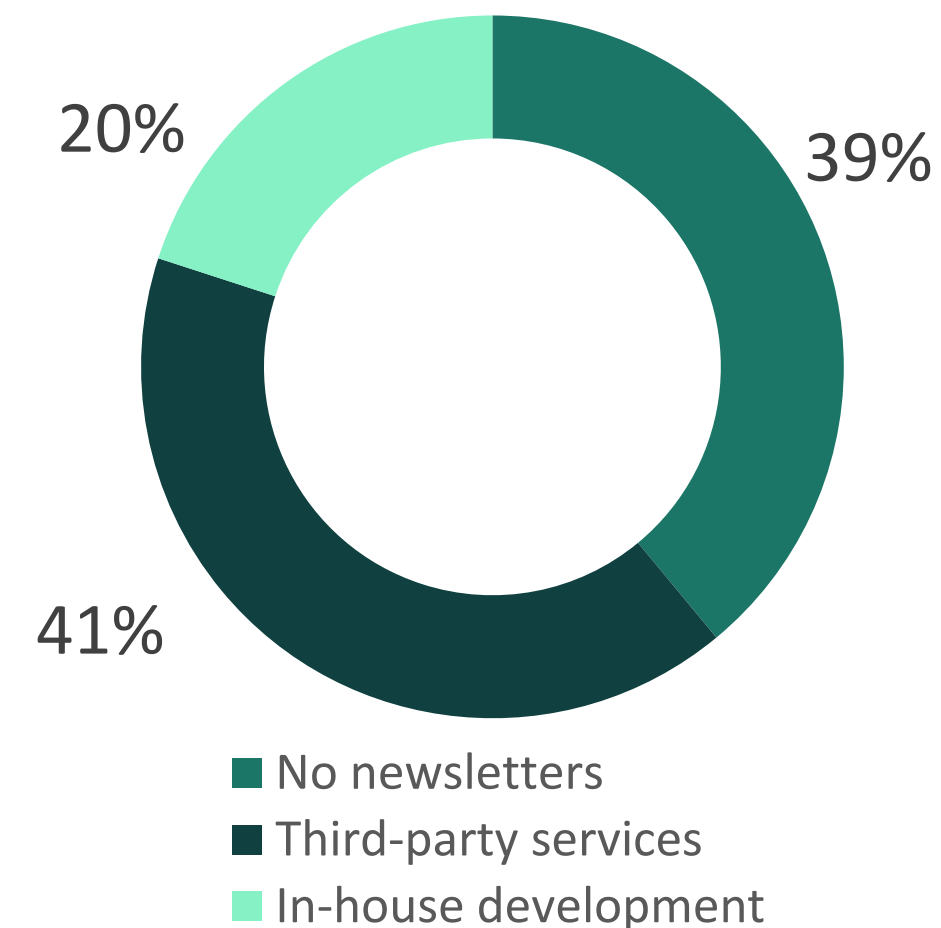
Technology

CMS



55% of the online multi-category stores use their CMS's (Content Management System or tool for creating, managing and editing website content). 21% of stores use Bitrix, 12% use WordPress and 12% use other services.

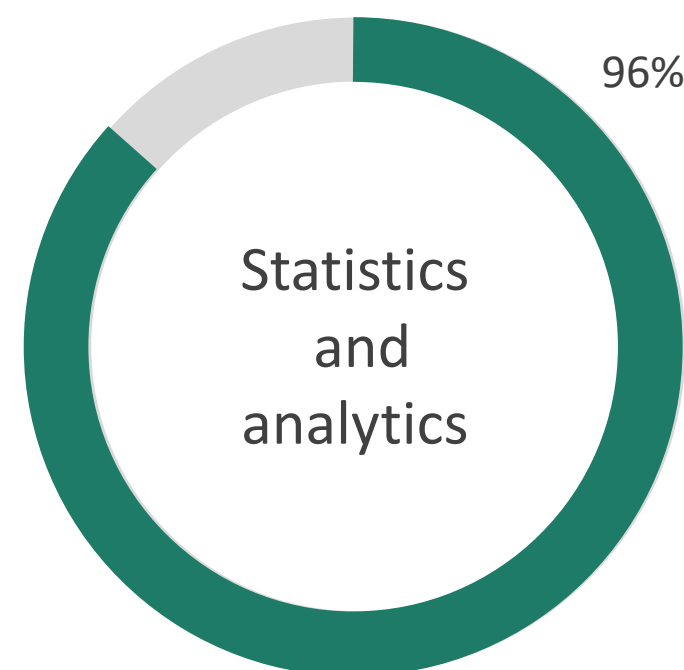
Newsletter



20% use newsletters they've developed. 39% of online stores do not send newsletters about their events and promotions. 41% use third-party services.

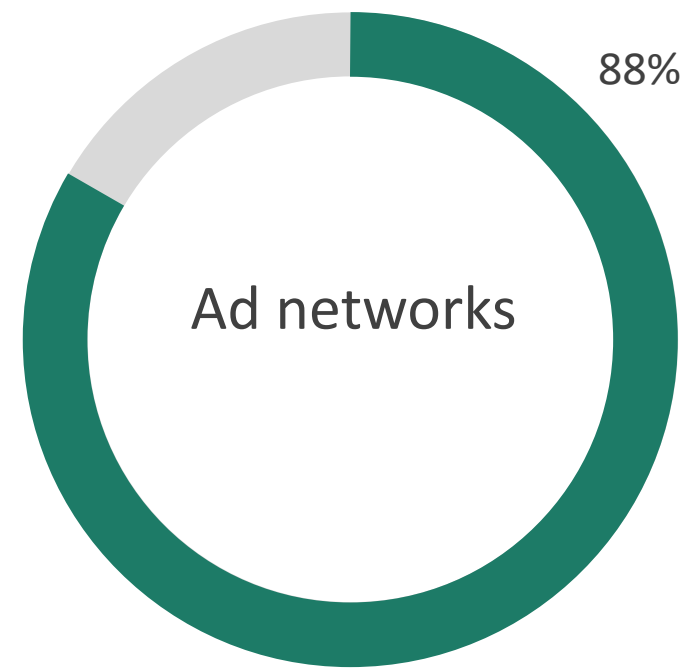
Marketing Services

Share of online stores using marketing services



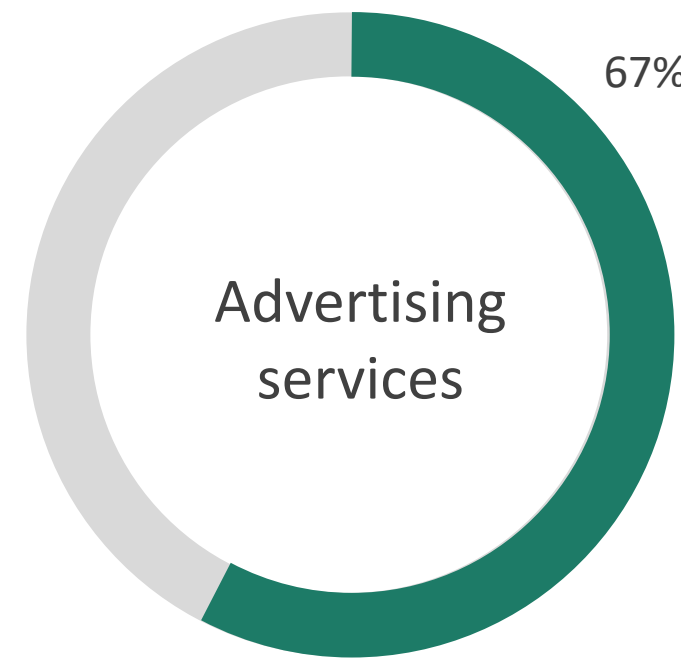
Yandex.Metrics, Google Analytics, calltracking systems, other services that track traffic and customers behavior on the website

🏆 Google Analytics – 90%



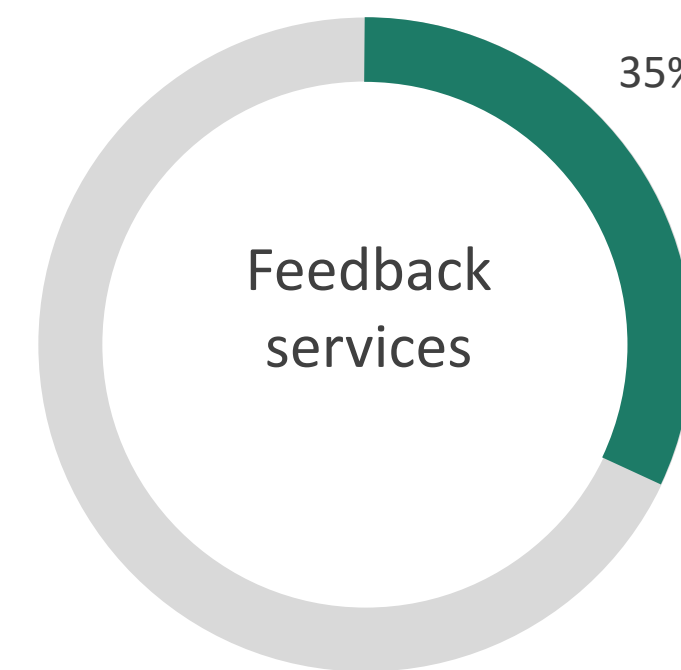
Networks for placing ads on pages of other ad network participants

🏆 DoubleClick (Google Display&Video 360) - 86%



Advertising management and personalization services

🏆 Facebook Custom Audiences – 39%



Online and email communication, callback services

🏆 JivoSite – 12%



News

News in Russia 2018

- November Media found out that Ozon.ru plans to invest \$200M. Ulmart launched Avito's competitor.
- October Yandex and Sberbank started Beru marketplace in a full mode.
- September Top Russian e-commerce players started to set up their own multifunctional marketplaces.
- August Ozon accounted for peak sales growth in Q2 2018.
- May Techport changed its image and relaunched its site. Tmall opened a distribution center for 500M roubles.
- April Onlinetrade.ru was honored with two awards for "Product of the Year - 2018".

Look out for more news in our weekly eCommerce updates

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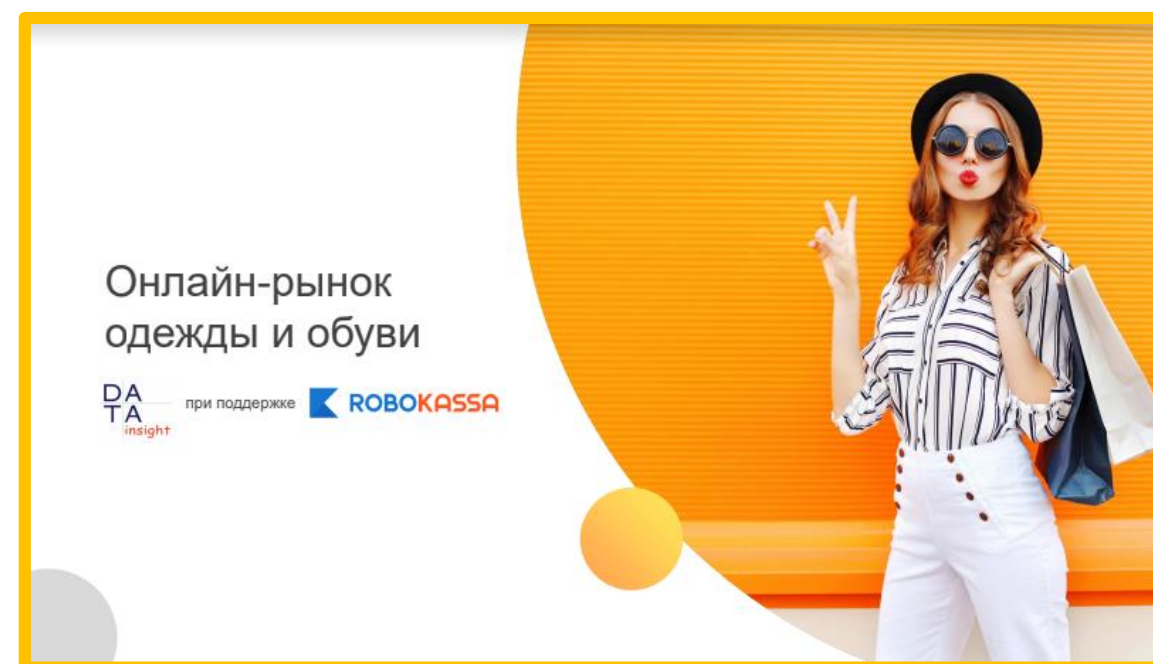
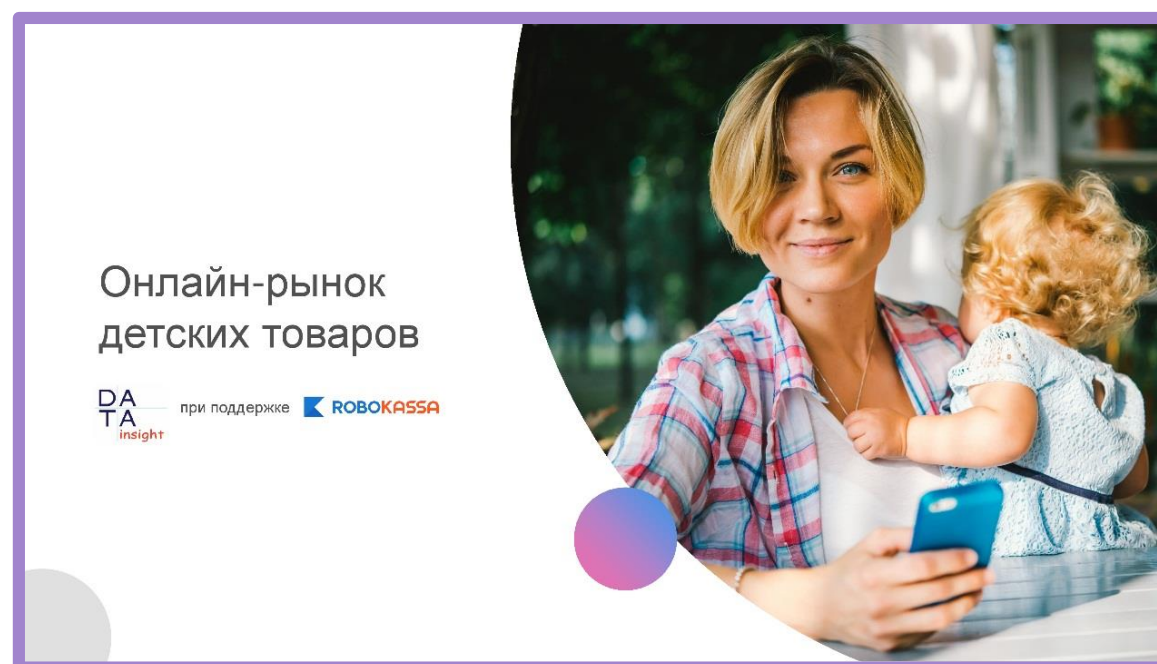
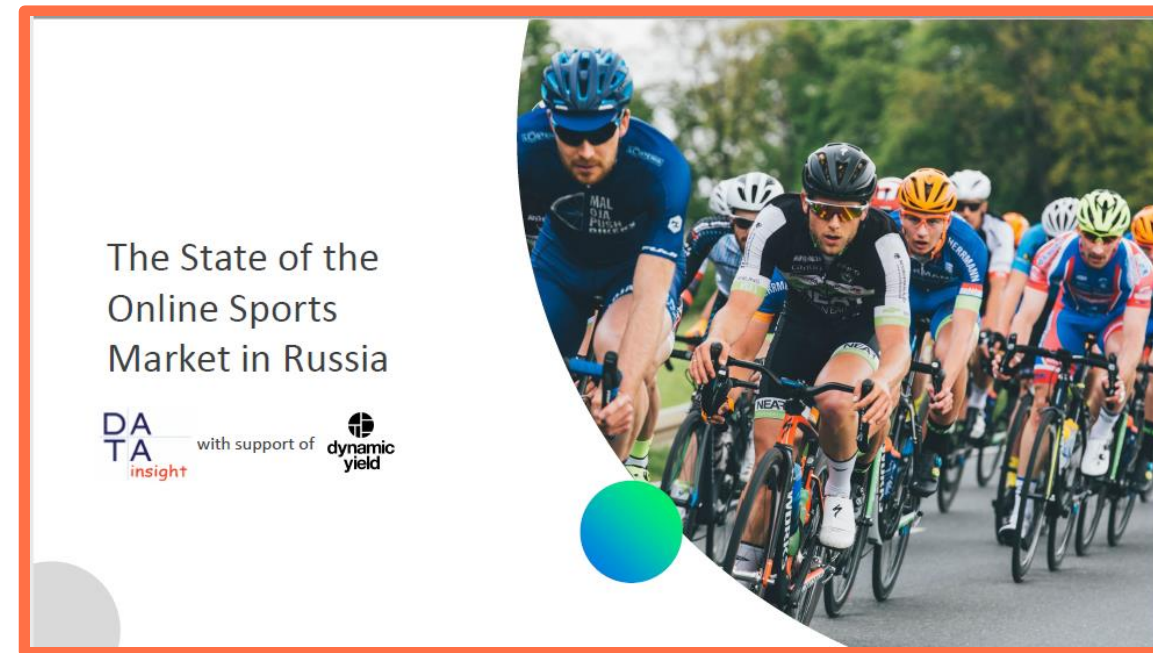
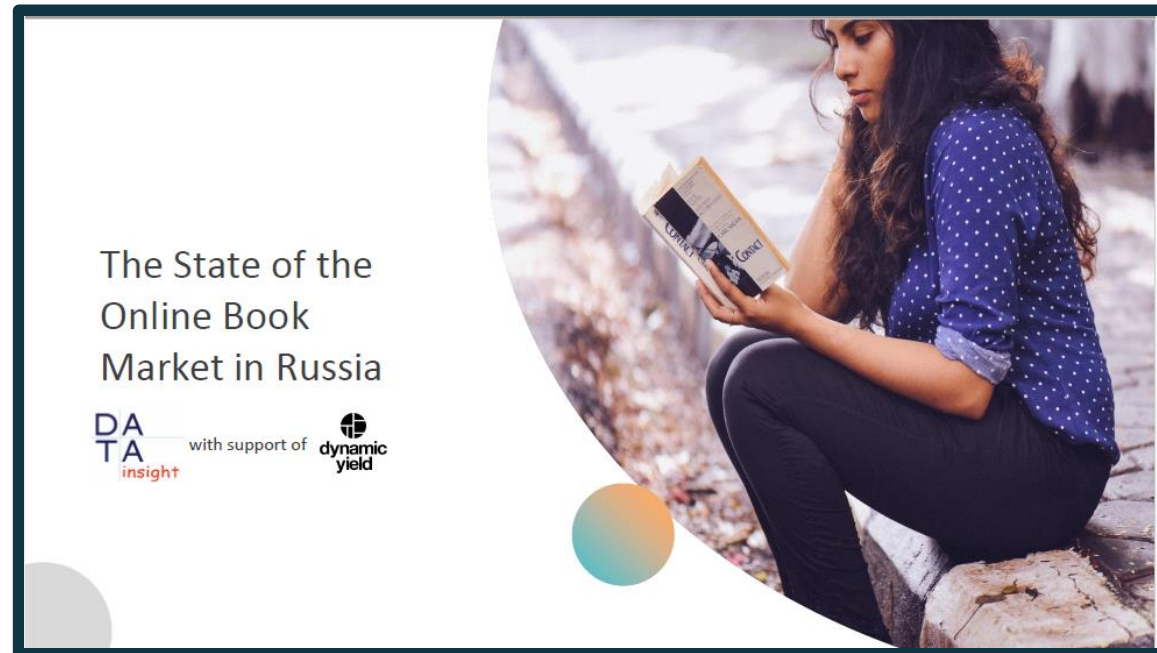
World News 2018

- December Everything Amazon did in 2018 that you might have missed.
Uncooperative terrain: why Alibaba needs furniture to sell, and Facebook – free space in department store.
- November Multichannel shopping on sale days in USA grew up to 40%.
Macy's earnings beat estimates as retailer raises forecast with hopes for strong holiday.
- October Walmart doubles down on its transformation into a technology company.
- September AliExpress attracts over 150 million global customers.
How department stores are fighting back to combat declining sales.
- July AliExpress makes a start of selling major appliances.
- January A cautious future for department stores in 2018.

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Our Sector Reports



New sector reports on the horizon:



Food



DIY



Electronics and home appliances



Dynamic Yield

Dynamic Yield is an AI-powered Personalization Anywhere™ platform that delivers individualized experiences at every customer touchpoint: web, apps, email, kiosks, IoT, and call centers. The platform's data management capabilities provide for a unified view of the customer, allowing the rapid and scalable creation of highly targeted digital interactions. Marketers, product managers, and engineers use Dynamic Yield daily for launching new personalization campaigns, running server-side and client-side A/B tests, leveraging machine-learning for product and content recommendations, and employing algorithms for smartly triggered email and push notifications.

Headquartered in New York, the company serves more than 300 brands across the world.

Learn more:

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