

# Key survey observations

2014 2015

## We're tightening our belts, but we still believe in miracles!



**32%** of Russians will buy gifts online



Ever more Russians (**33%**) are using smartphones to make purchases, and **65%** plan to do so in the future



**14%** of all gifts ordered online by Russians last year were not delivered on time. **One in four Russians will not buy online again after late delivery.**



**Home delivery is becoming more desirable** (preferred by **24%** of Russians) but the option to order online and pick up purchases at the store or some other location has become just as important (preferred by **22%** of Russians)

**2015**

The average holiday budget for 2015 (RUB 15 107) is **6%** larger than last year's actual holiday spending (RUB 14,225).



In 2014 the average New Year holiday budget (RUB 19,200) was 26% higher than actual spending (RUB 14,225)



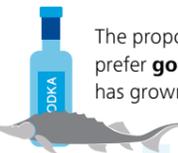
Actual holiday spend in 2015 may be **25-35%** lower than budget: **9 820 – 11 330** Rubles.



Russians expect retailers to **invest in price reductions** and home delivery. **Omni-channeling is also desired.**

**61%**  
**38%**

Among **loyalty programmes**, in-store sales remain the preferred type of discount, though their popularity is decreasing – **38%** compared to **61%** last year



The proportion of Russians who prefer **goods produced in Russia** has grown from **62%** to **68%**

The average **voucher value** in Russia is worth the same as the average gift costs (approx. 950 RUB)

Russians are looking at the future with caution, with **25%** expecting a recession in 2015 while **22%** expect economic growth



The proportion of people who believe the economy is in **recession** decreased from **37%** to **30%**.



Among Russians, the **24-35** age group is the **most optimistic**, among whom only **20%** see a recession

Looking ahead, Russians are still optimistic, with **29%** expecting improvement in their spending power in 2015 (versus **22%** expecting deterioration)

For the first time in the last several years, more Russians have **perceived deterioration in their spending power (38%)** than those who **felt an improvement (24%)**. **Younger Russians (18-24 years old)** are the only group that **perceived an improvement** in their spending power in 2014

The average **Russian consumer** will cut down on gifts for him/herself, spending only **13%** of their holiday budget on themselves as compared to **17%** last year



**44%** **34%**



**58%** **49%**



For New Year's presents, **men want** to receive **money (44%)** and **smartphones (34%)**, while **women want money (58%)** and **travel (49%)**. However, the presents they're most likely to receive are **cosmetics (33%)**, **chocolate (27%)** and **books (19%)**.



**Jewelry is desired as a gift by 39%** of women but only **12%** will actually receive some.



**21%** of Russians will shop for New Year's gifts in **less expensive stores** than last year (2013 – only **8%**)



Only **1 in 10** Russians will not cut down on entertainment and **impulse purchases**