



## Social commerce in Russia:

Purchases in social networks, in messengers, on ad platforms, and sharing economy websites



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# About the study

Social commerce encompasses trade relations based on sales and purchases in social channels: in social networks, in instant messengers, on classified ad platforms, and via other P2P platforms

## Our study included:

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Purchases in social networks, in messengers, at advertisement, and sharing economy\* websites, joint purchases

Purchases of tangible and virtual goods (including in-game purchases) and services

Purchases of Russian Internet users aged 14-54

## Our study didn't include:

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Any purchases made outside the listed platforms, particularly purchases on game platforms

Purchases in real estate and auto sectors

\* Closed list of service exchange websites and marketplaces with implemented social mechanics:  
AirBnB.ru, Profi.ru, YouDo.ru, Remontnik.ru, Pomogatel.ru, BlaBlaCar.ru, BeepCar.ru, Livemaster.ru, Etsy.com

# Types of social channels

## Social networks

- Vkontakte (vk.com)
- My Mail.ru
- Odnoklassniki (ok.ru)
- Facebook
- Instagram
- LiveJournal
- Spaces

## Messengers

- Facebook Messenger
- ICQ
- Mail.ru Agent
- WhatsApp
- Skype
- SnapChat
- Telegram
- Viber

## Advertisement

- Avito.ru
- Auto.ru
- Irr.ru
- Youla.io
- Drom.ru
- Farpost.ru
- N1.ru

## Sharing economy

- Pomogatel.ru
- Remontnik.ru
- Livemaster.ru
- AirBnB.ru
- BeepCar.ru
- BlaBlaCar.ru
- Etsy.com
- Profi.ru
- YouDo.ru

The background features a dark blue gradient. A large, bright blue sphere is positioned in the upper right quadrant. A bright cyan shape, resembling a stylized arrow or a large 'L' rotated 45 degrees, is located in the bottom right corner. The text 'Key insights' is written in white on the left side.

Key insights

# Purchases via social channels

## Key insights

- ✓ **39mln of internet users** make purchases via social channels – it is 55% of all Russian internet users.
- ✓ **Both men and women** are equally involved in purchasing via social channels: 49% of all buyers are male, and 51% - female. Women prefer social networks and make up 56% of their audience, and joint purchases (80%). Men more often choose classified ad platforms (53%).
- ✓ **25% of users** who haven't made purchases via social networks are planning to do it in the future.
- ✓ **₽591bn (≈ \$8.98bn)** is a total sum of purchases made via social channels for a year.
- ✓ An average buyer usually makes **3 purchases via social channels per month**.
- ✓ **₽1,500 (≈ \$23)** is an average check of social commerce.
- ✓ 15,7% of purchases — **apparel and footwear**, 10,1% — food, 8,2% — electronics and household appliances
- ✓ **55%** of users make purchases via **social networks**, **30%** — at **classified ad platforms**, **13%** — in **messengers** (percentage of all users purchasing via social channels).
- ✓ **Vkontakte has the largest audience** (44% of all internet users), followed by Avito (28%) and Youla (16%).
- ✓ **40% of purchases via social channels are paid online**. 33% are paid with a card, 11% — with e-wallets, 8% — to bank account details.
- ✓ Users of joint purchases platforms prefer to pay with **cards (51% of purchases via this social channel)**, and buyers via messengers more often use **e-wallets (16% of purchases)**.

# Audience of buyers via social channels

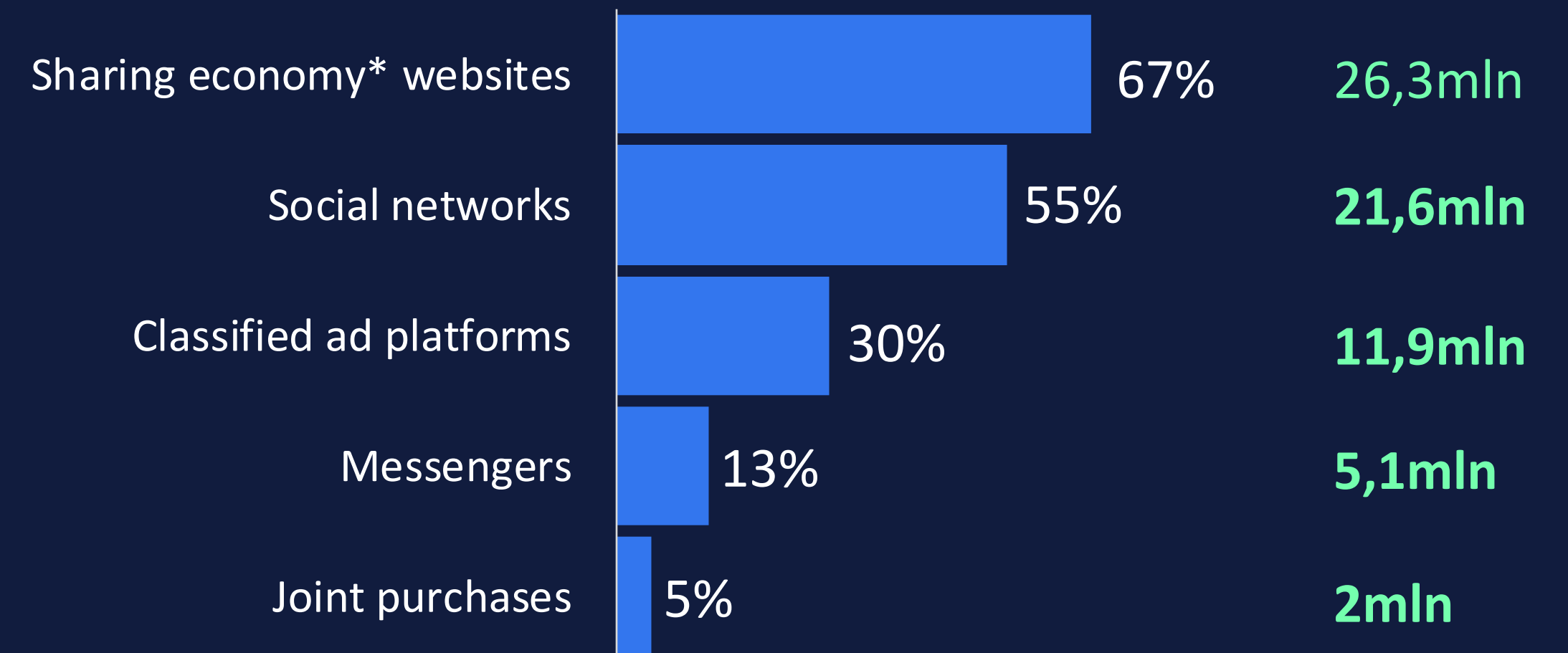
**39mln of individuals**

have made a purchase via social channels  
in the past 12 months  
(55% of internet users)

**56mln of individuals**

have made online purchases  
in the past 12 months  
(79% of internet users)

Distribution of buyers (mln)  
among social channels



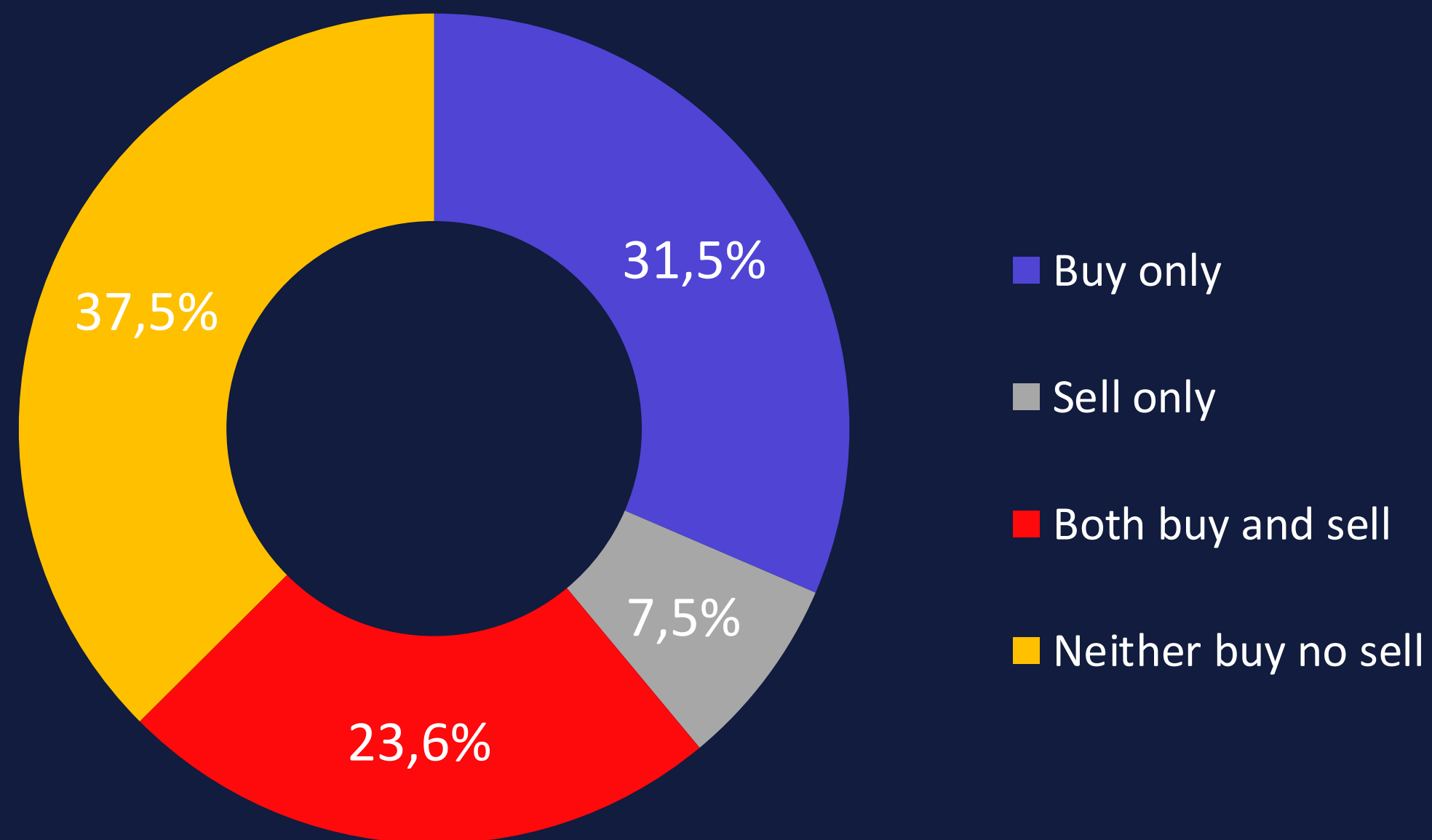
Online survey among internet users, 3014 responses to the question "Did you make purchases of goods and services via any social channels?"

\* AirBnB.ru, Profi.ru, YouDo.ru, Remontnik.ru, Pomogatel.ru, BlaBlaCar.ru, BeepCar.ru, Livemaster.ru, Etsy.com

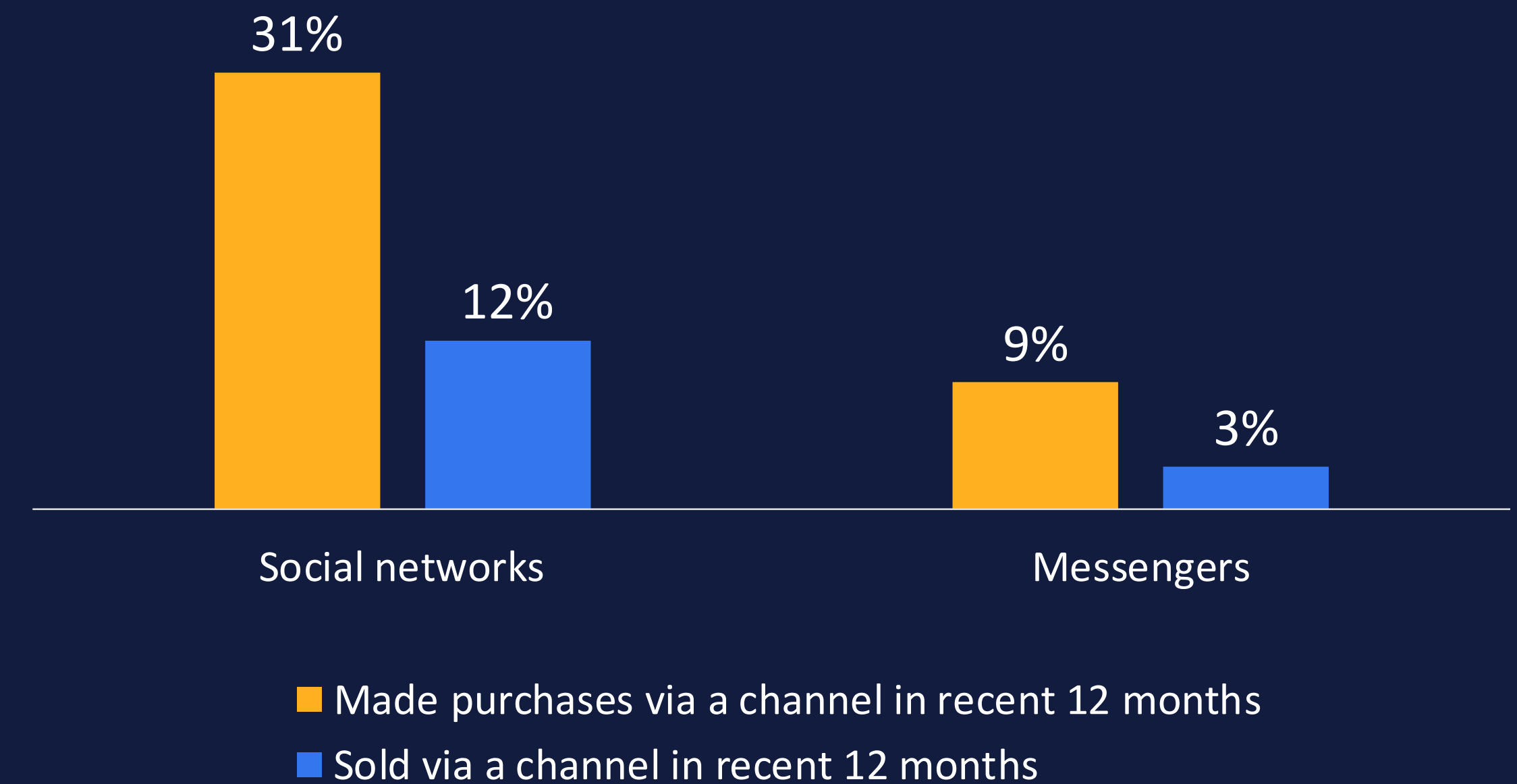
# Share of purchasers in social channels

55% of users make purchases via social networks

Merchants and purchasers in social channels,  
% of internet users



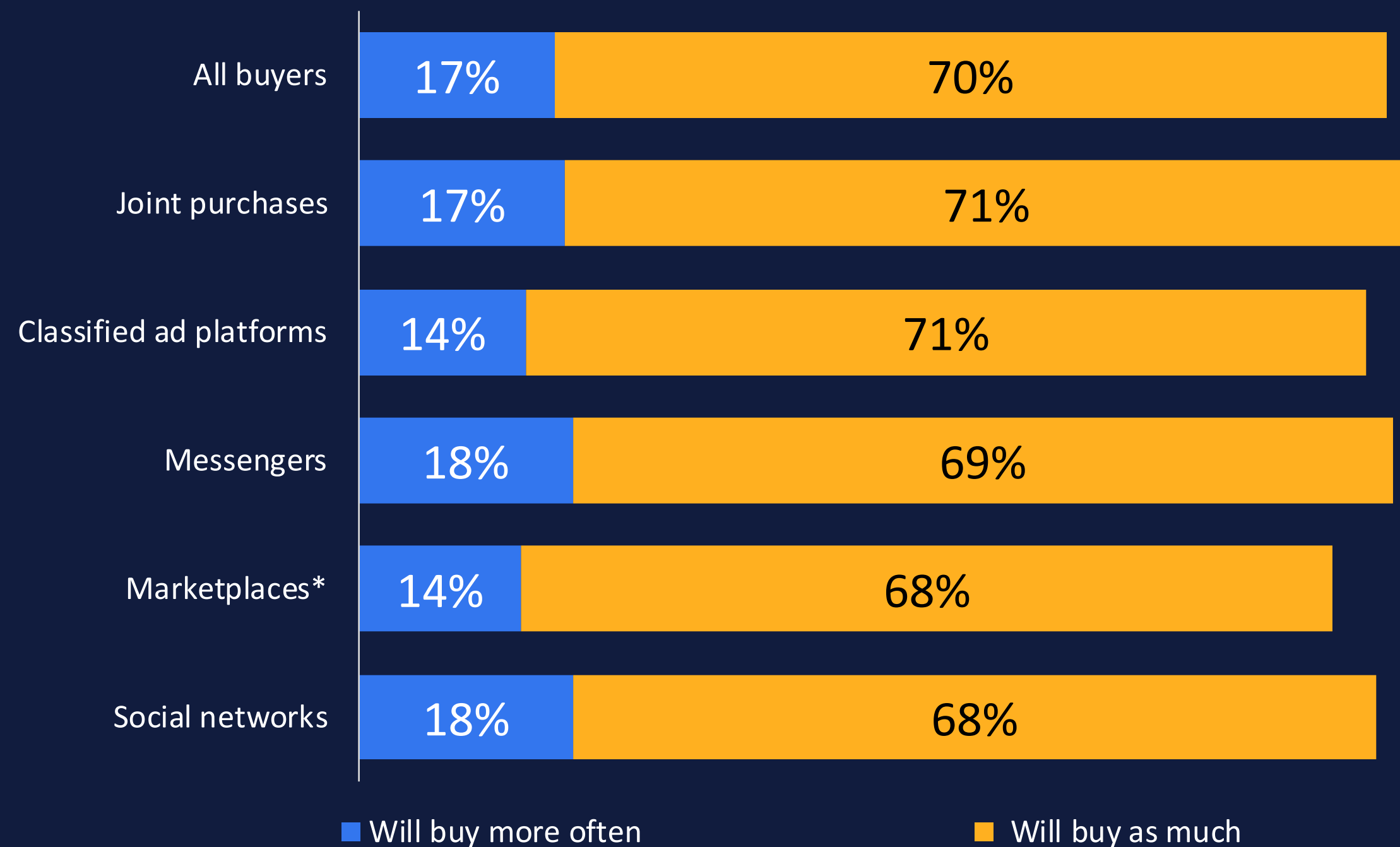
Merchants and purchasers,  
% of channels audience



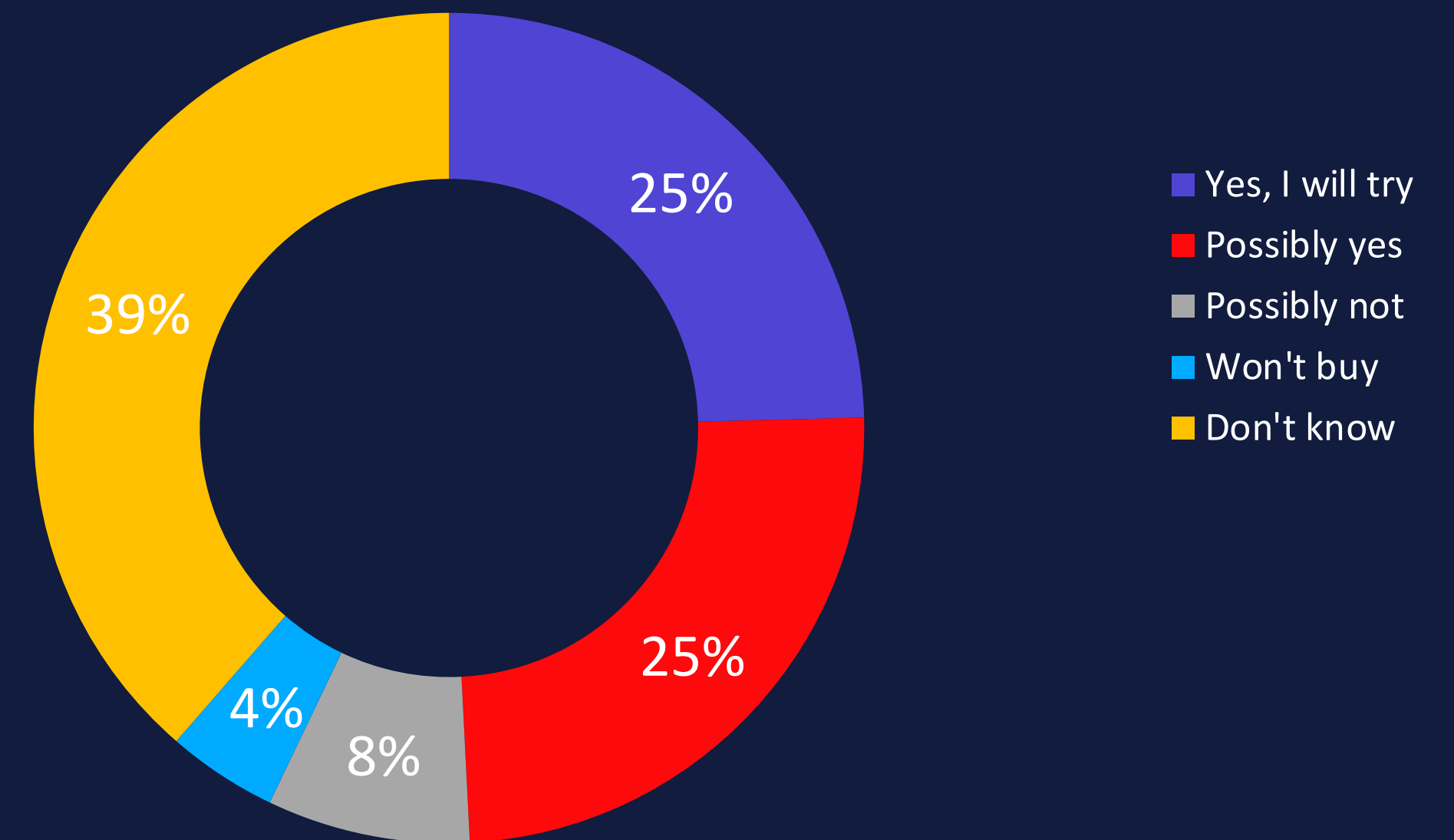


# Future of social commerce: buyers' intentions

Survey among buyers (% of purchasers via a channel)



Survey among non-buyers (% of purchasers via a channel)



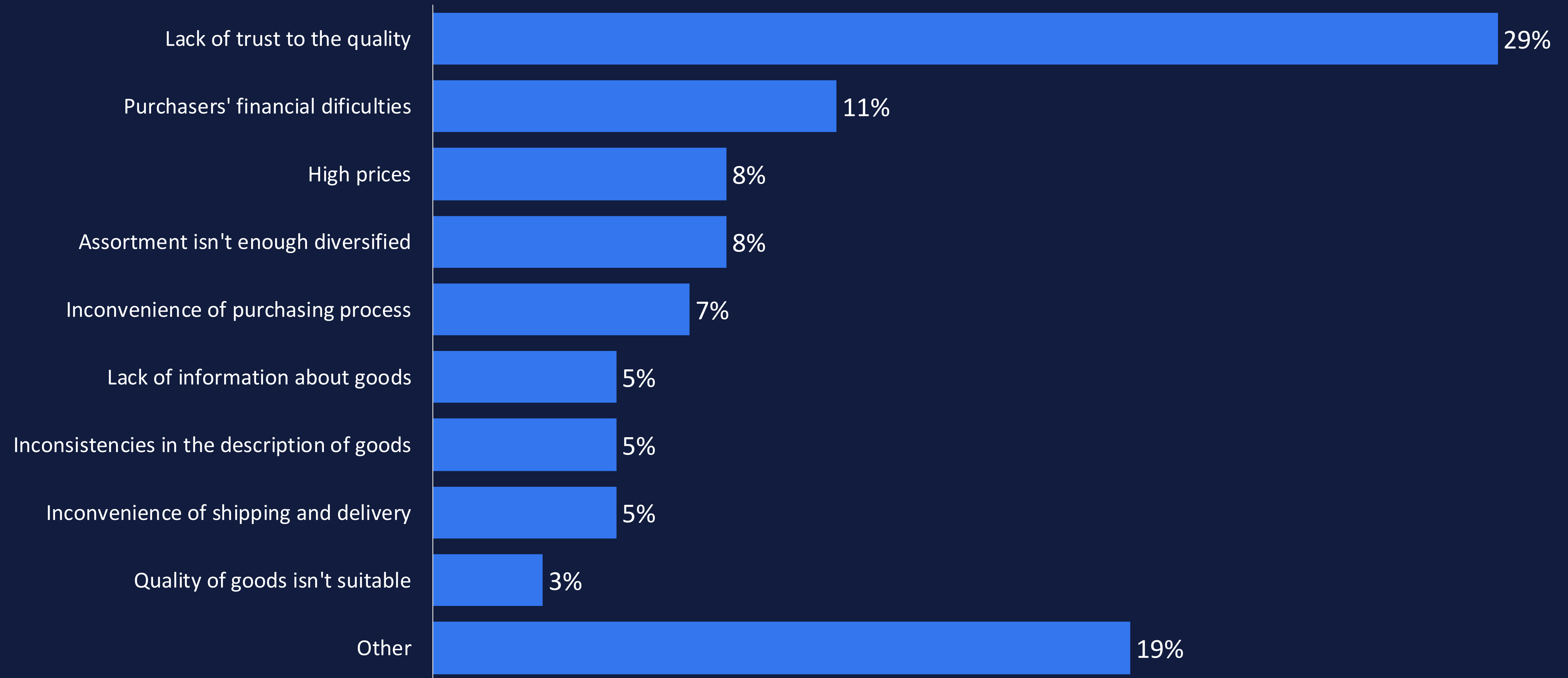
Online survey among internet users. Questions:

- to buyers: Do you plan to continue purchasing this way? 1659 responses.

- to non-buyers: Will you buy via social channels? 443 responses.

\* AirBnB.ru, Profi.ru, YouDo.ru, Remontnik.ru, Pomogatel.ru, BlaBlaCar.ru, BeepCar.ru, Livemaster.ru, Etsy.com

# Reasons for rejection of buying via social channels





Purchases in social channels

# Goods and services purchased in social channels

16% of purchases via social channels — Apparel and footwear

	\$bn per year	Average check, \$ *	Percentage of deals, %
Apparel and footwear	≈1.52	≈29	15,7
Electronics and household appliances	≈1.46	≈54	8,2
Real estate rental services	≈1.2	≈97	3,7
Other services	≈1.12	≈22	17,6
Animals and plants	≈0.95	≈45	6,4
Baby and child-specific products	≈0.46	≈20	6,9
Tickets (transport, events)	≈0.34	≈17	6,2
Household goods	≈0.31	≈22	4,2
Arts and crafts materials	≈0.27	≈27	3
Gifts and jewelry	≈0.23	≈19	3,7
Food	≈0.18	≈15	10,1
Gaming characters and objects	≈0.17	≈5	1,1
Automotive parts and accessories	≈0.13	≈37	7,7
Other**	≈0.46	-	1,9

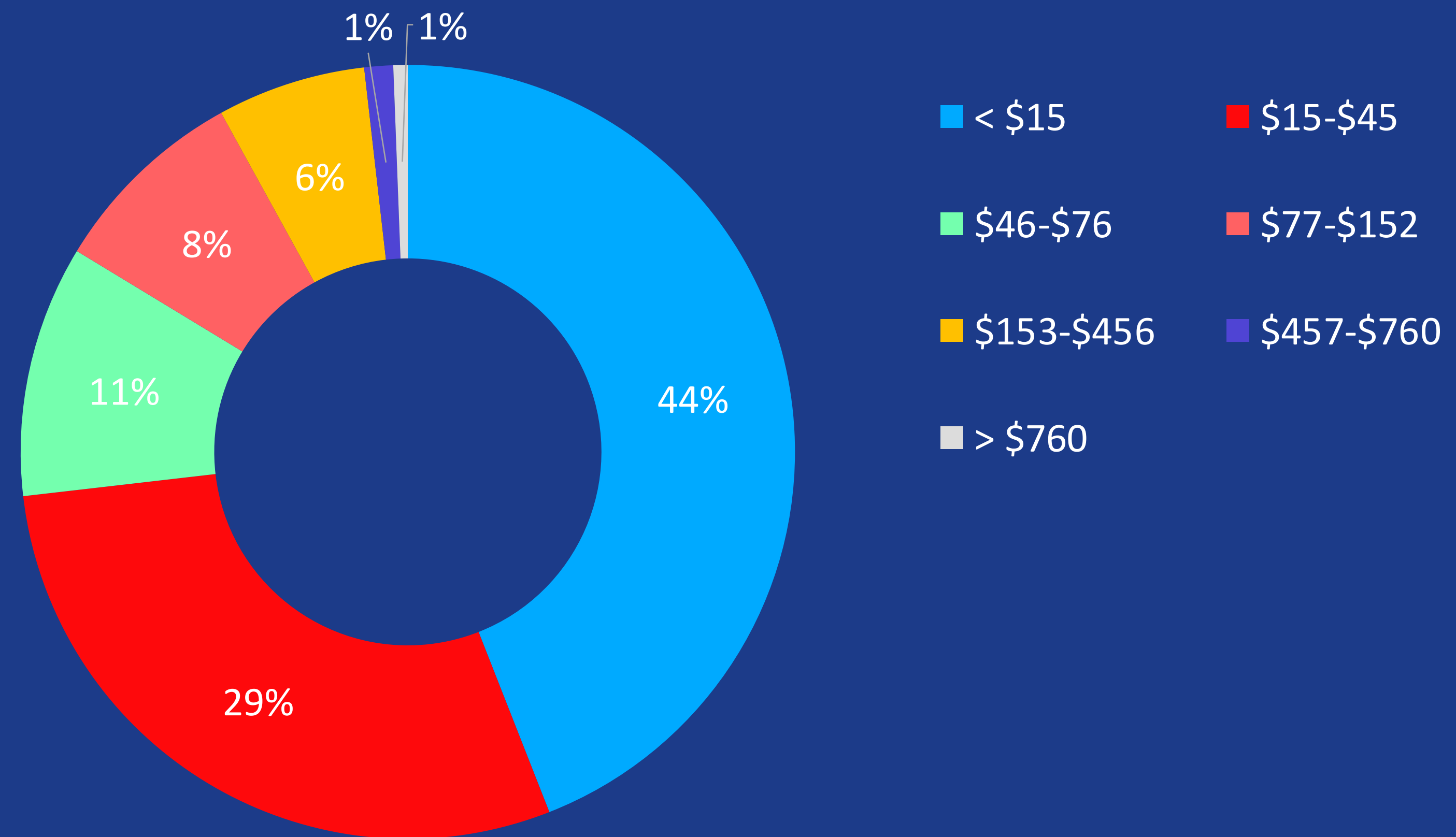
\*Average check. Online survey among Internet users about the latest purchase from online social platforms.

\*\* Among categories all together stand for 2% of social sales — sport equipment (average check — ≈\$37), books and audios (≈\$30), medicine (≈\$22), cosmetics and beauty (≈\$8.5)

# Average check of purchases in social networks

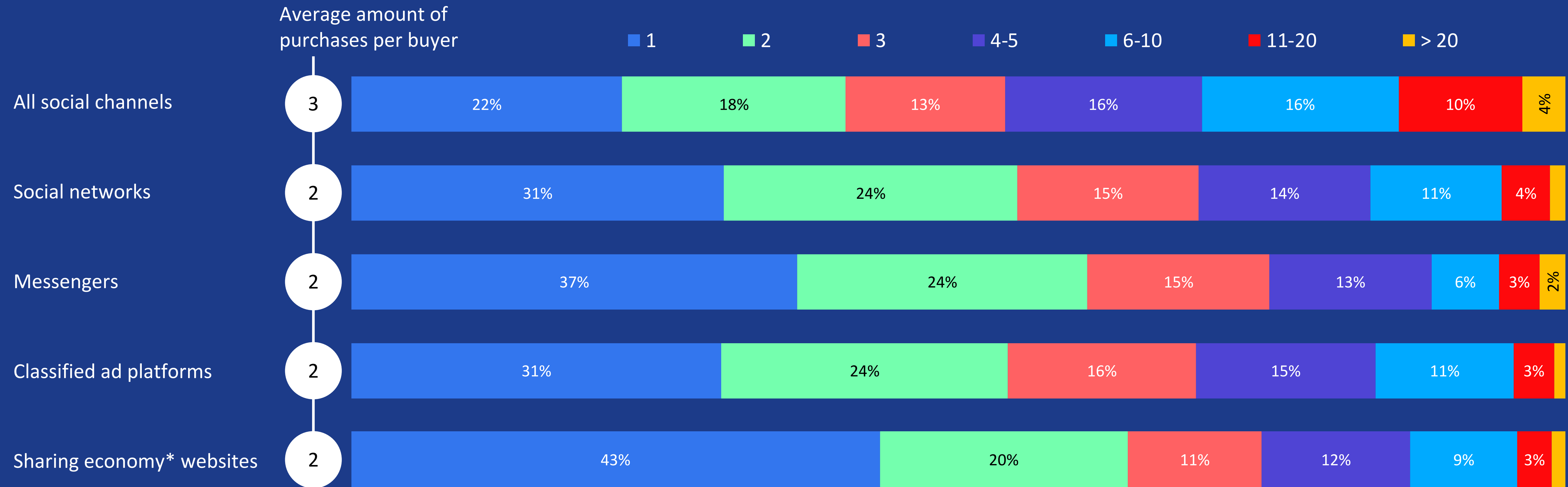
Average check of social commerce in Russia is ₺1,500 ( $\approx$  \$22.5).

Goods worth more ₺10,000 ( $\approx$  \$148) make up 8% of the overall amount of purchases.

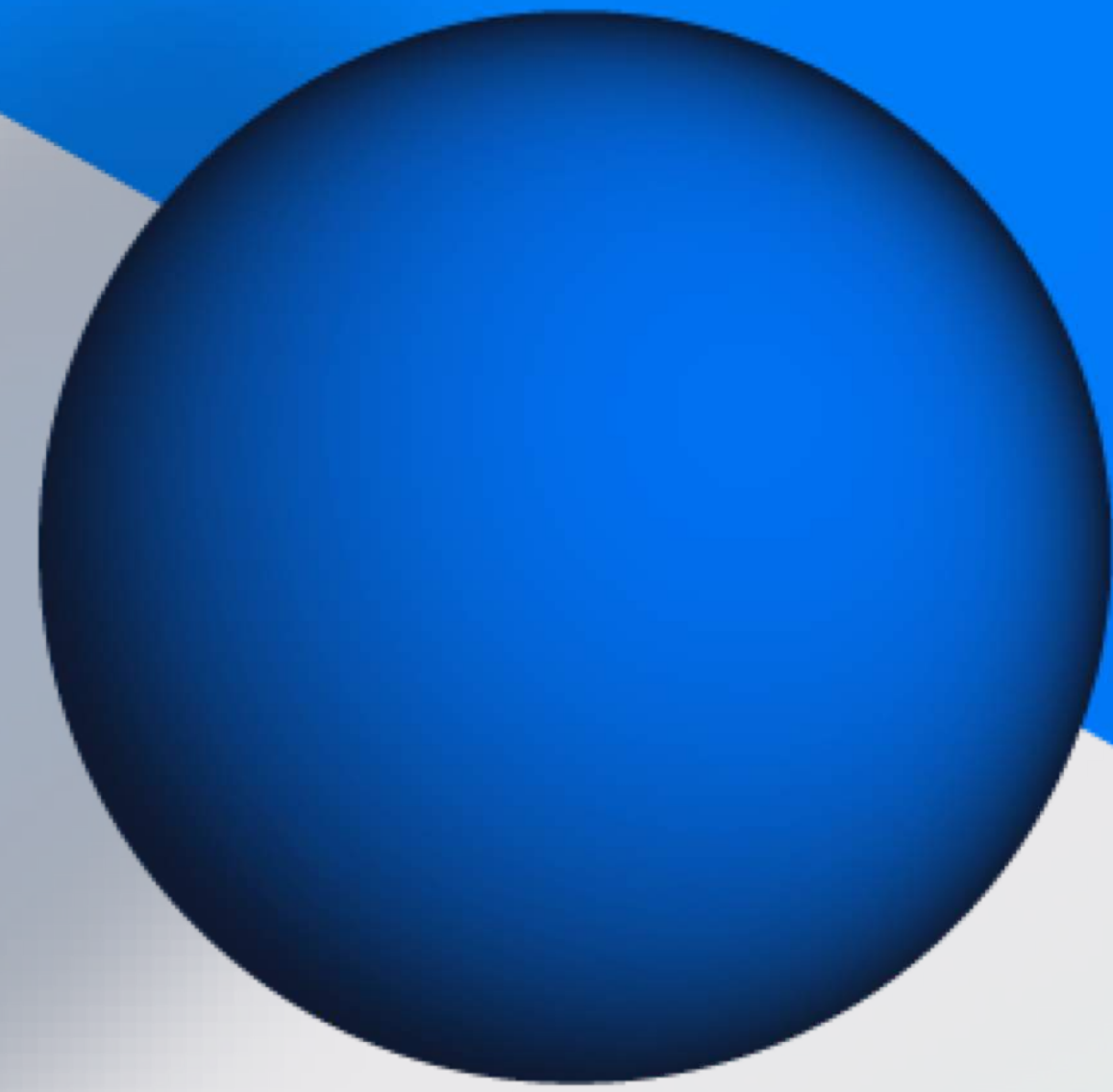


Online survey among internet users, 1,593 responses.  
Question: What's the approximate amount you spent last time?

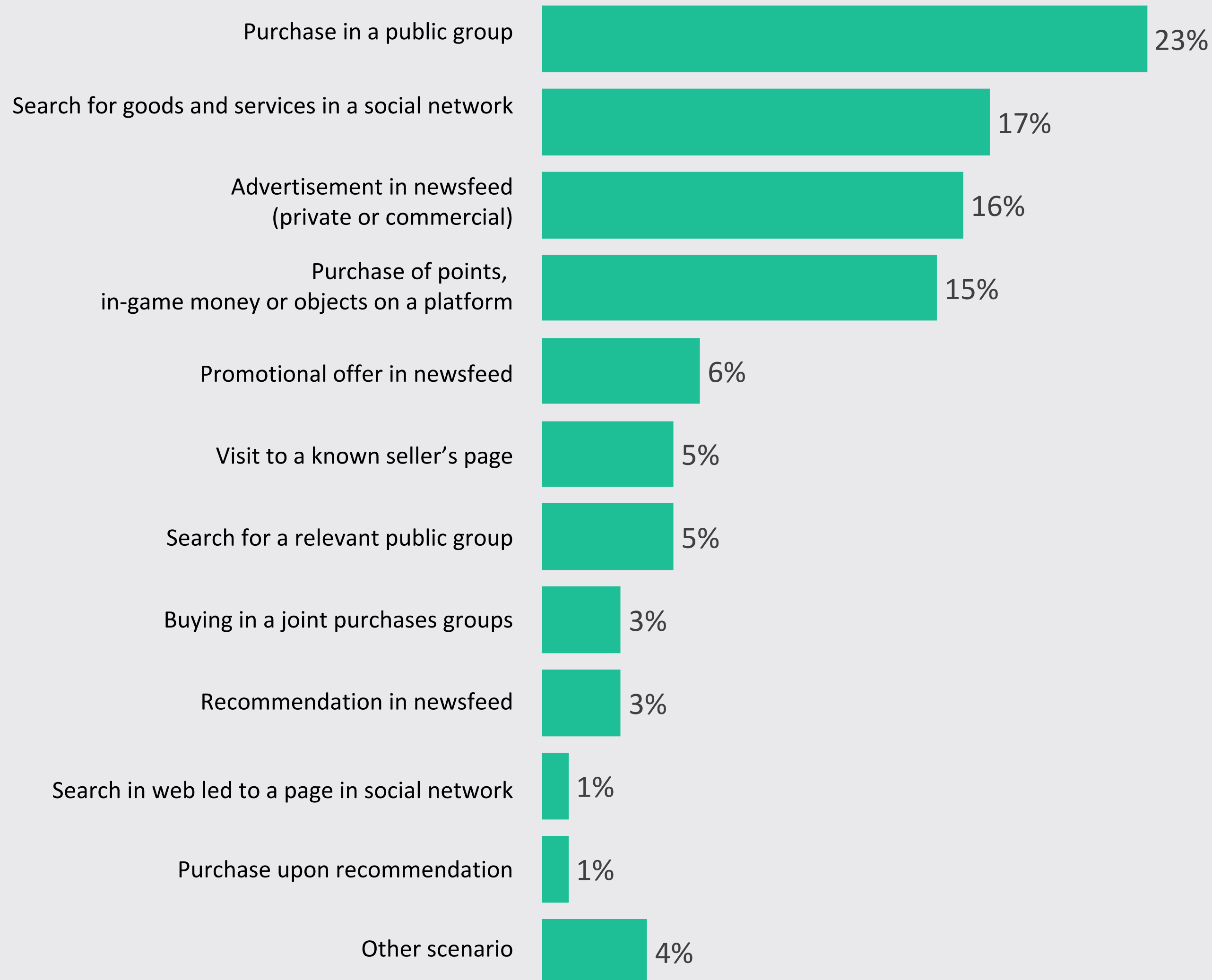
# Amount of purchases per buyer for 30 days



# Scenarios of purchases in social channels



# Scenarios of purchases in social networks



**25-50% of purchases in social channels is previously planned.**

- The most popular kind of purchases in social networks is an order in a public group or community (25%). This purchase can be planned or spontaneous.
- At least 25% of purchases in social channels is a result of a targeted search for particular good and services: search queries – 17% of purchases, direct access to saved webpage of a merchant – 5%, search for a relevant public group or community – 5%.

Online survey among internet buyers, 393 responses. Question: You have previously mentioned that you bought goods and services on social platforms. What website or app did you use last? Please describe your actions to pursue a purchase then.

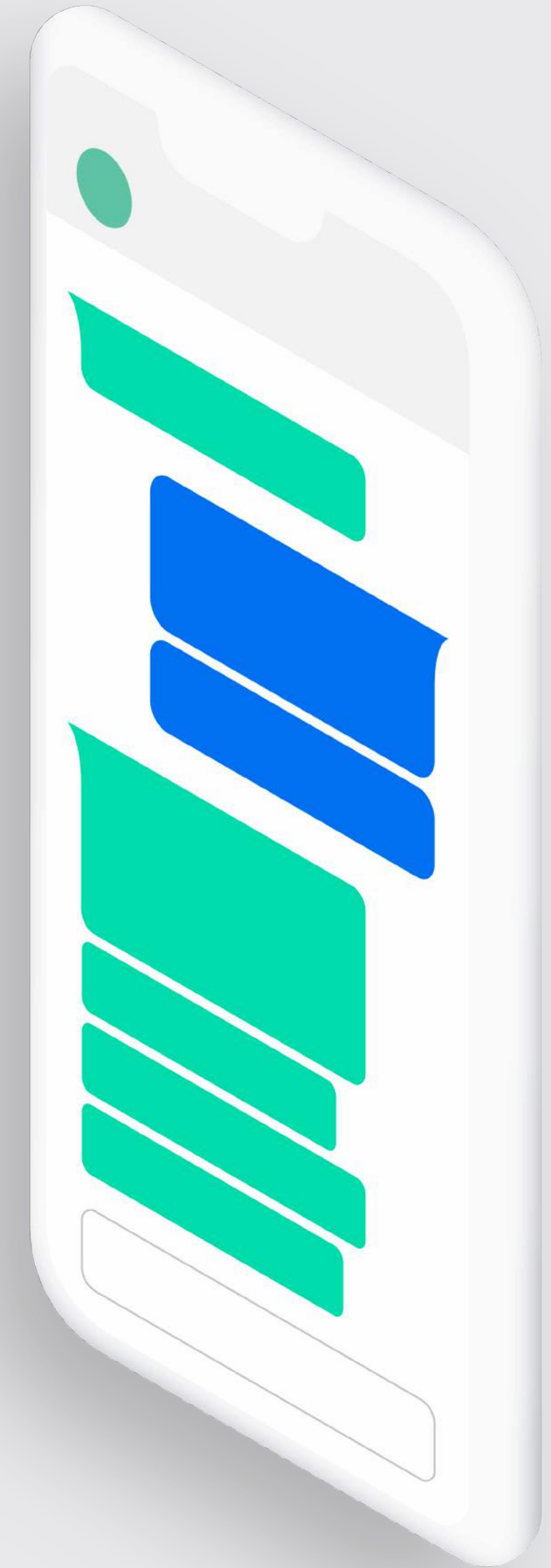


# Scenarios of purchases via messengers

Messengers are often used for communications between a buyer and a merchant. Purchases via a messenger follows buyer's choice of goods or services on seller's website or in his social network profile. Messenger becomes a space for discussing conditions of purchase.

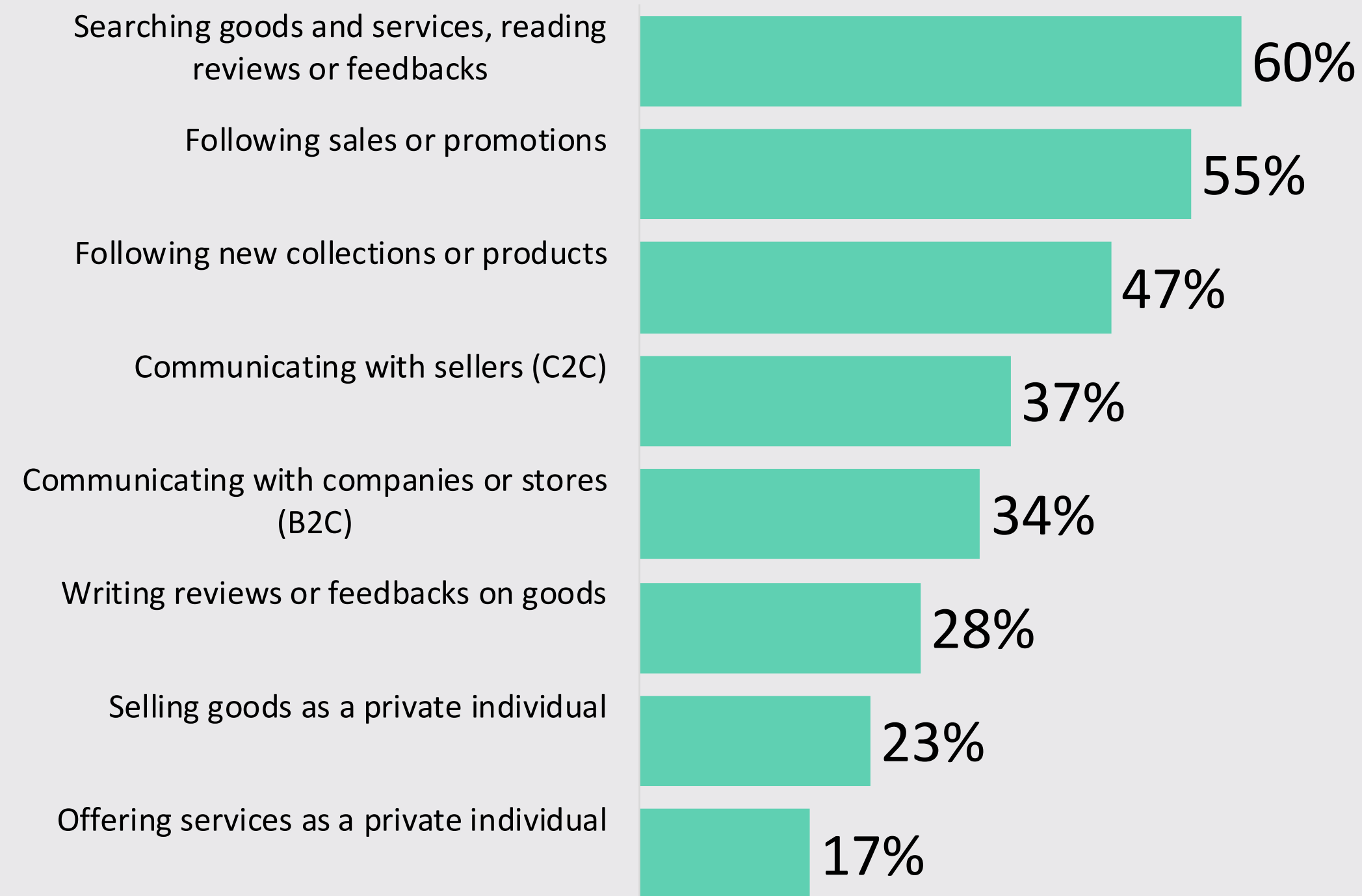
Other scenarios that work less:

- A purchaser chooses a seller and a particular thing directly in a messenger: in a channel, via a chat bot, in a private chat.
- A purchase is pursued as a result of advertisement offer from a messenger.



# Other actions of purchasers in social networks and messengers

## In social networks



## In messengers

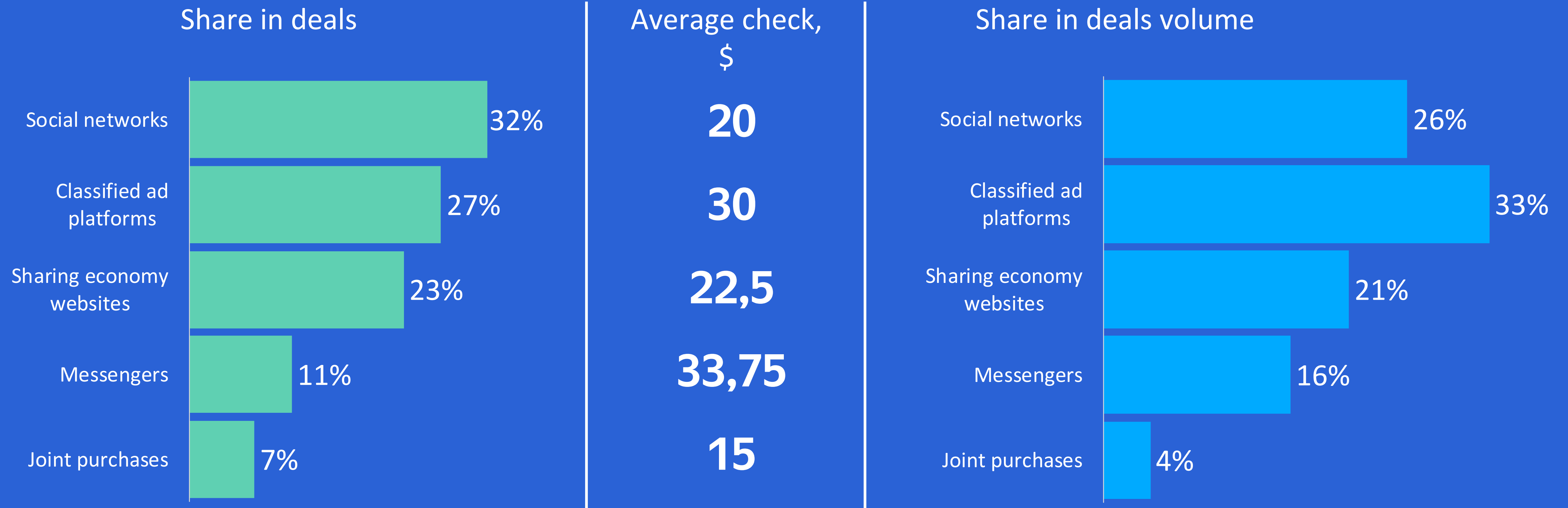




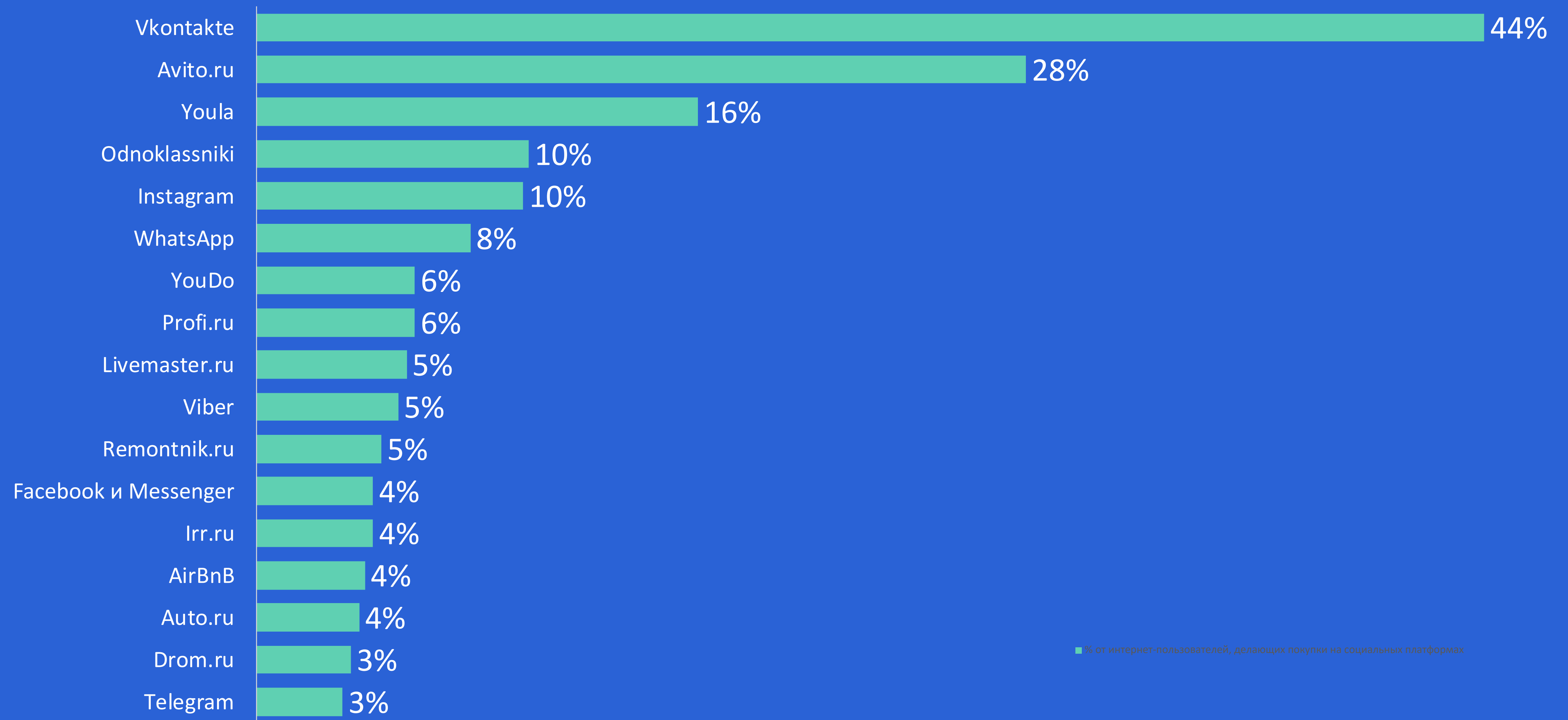
Social commerce channels

# Shares of social channels in Russia's social commerce

Classified ad platforms accounts for 33% sales volume in social commerce



# Social channels by the percentage of purchasers



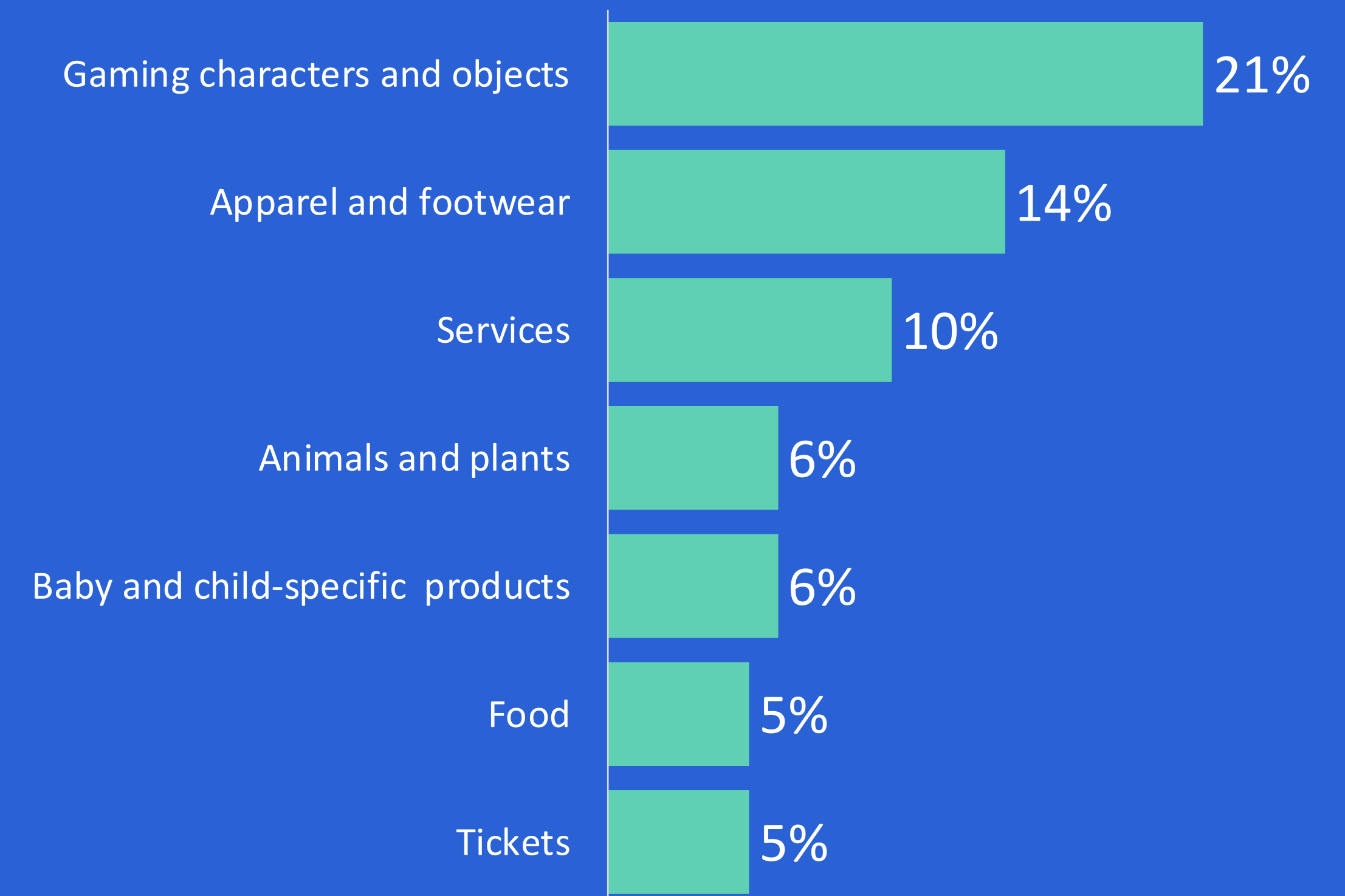
Online survey among internet users, 1615 responses. Question: Did you make any purchases via any of these channels in the recent 12 months?

All these platforms have share of  $\geq 3\%$  social commerce buyers

# Vkontakte (vk.com)

- Ranked first by the percentage of social deals—20,6% (excluding in-game purchases on the platform—15%)
- Ranked first by the percentage of purchasers via social channels—44%, unique audience of purchasers—22,5%
- Ranked third by the percentage of merchants using social channels for sales (the first and the second are Avito and Youla)—33%
- Share of new goods—69% (including handmade and excluding food and antique)

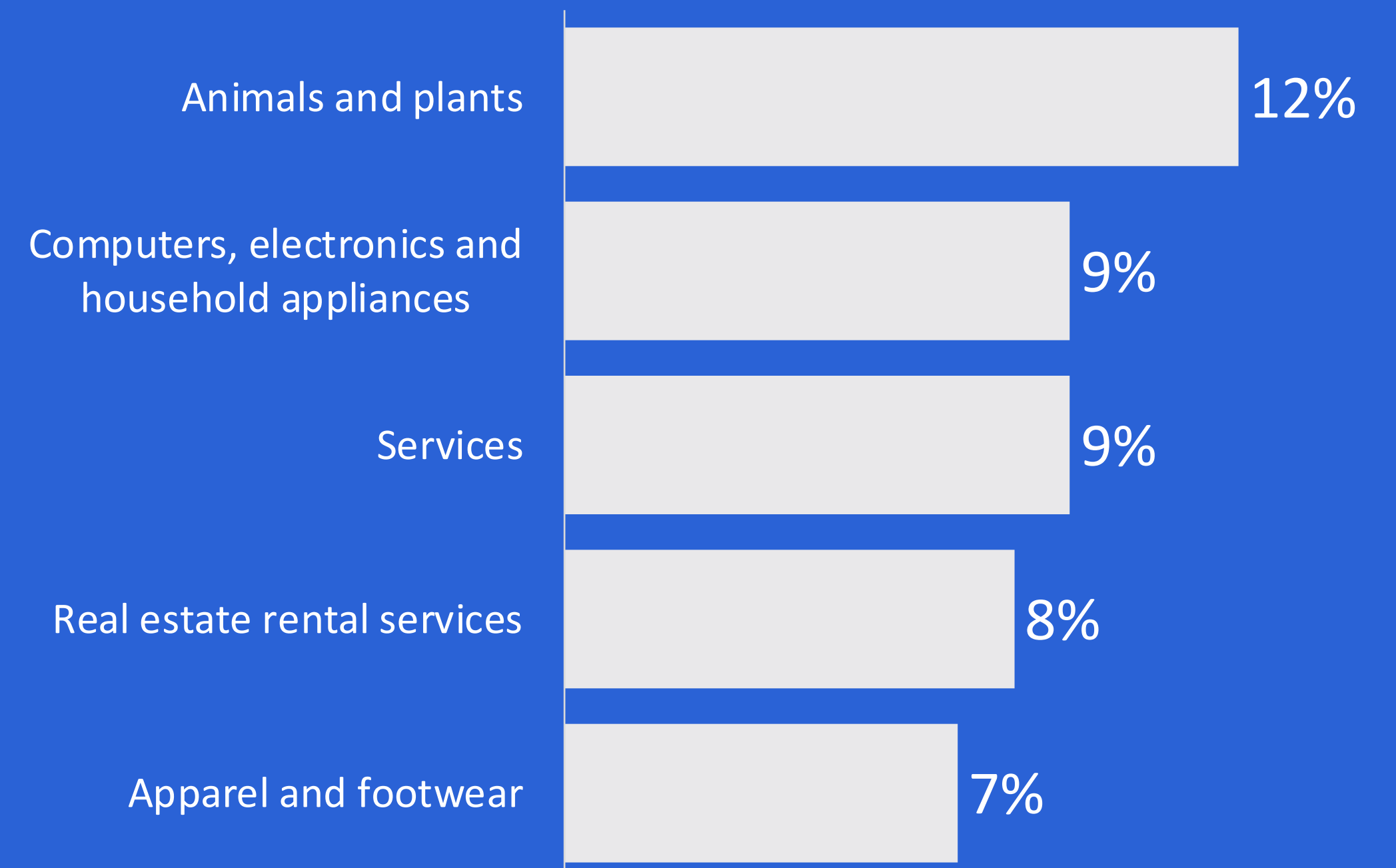
## Top categories of sales



# Avito

- Ranked second by volume of deals in social channels—13%
- By percentage of purchasers via social channels Avito is ranked second after Vkontakte. The unique audience of such buyers is 6%
- In the top by percentage of merchant via social channels—65%
- The least popular social platform for offering new goods for sale—25% (including handmade and excluding food and antique)

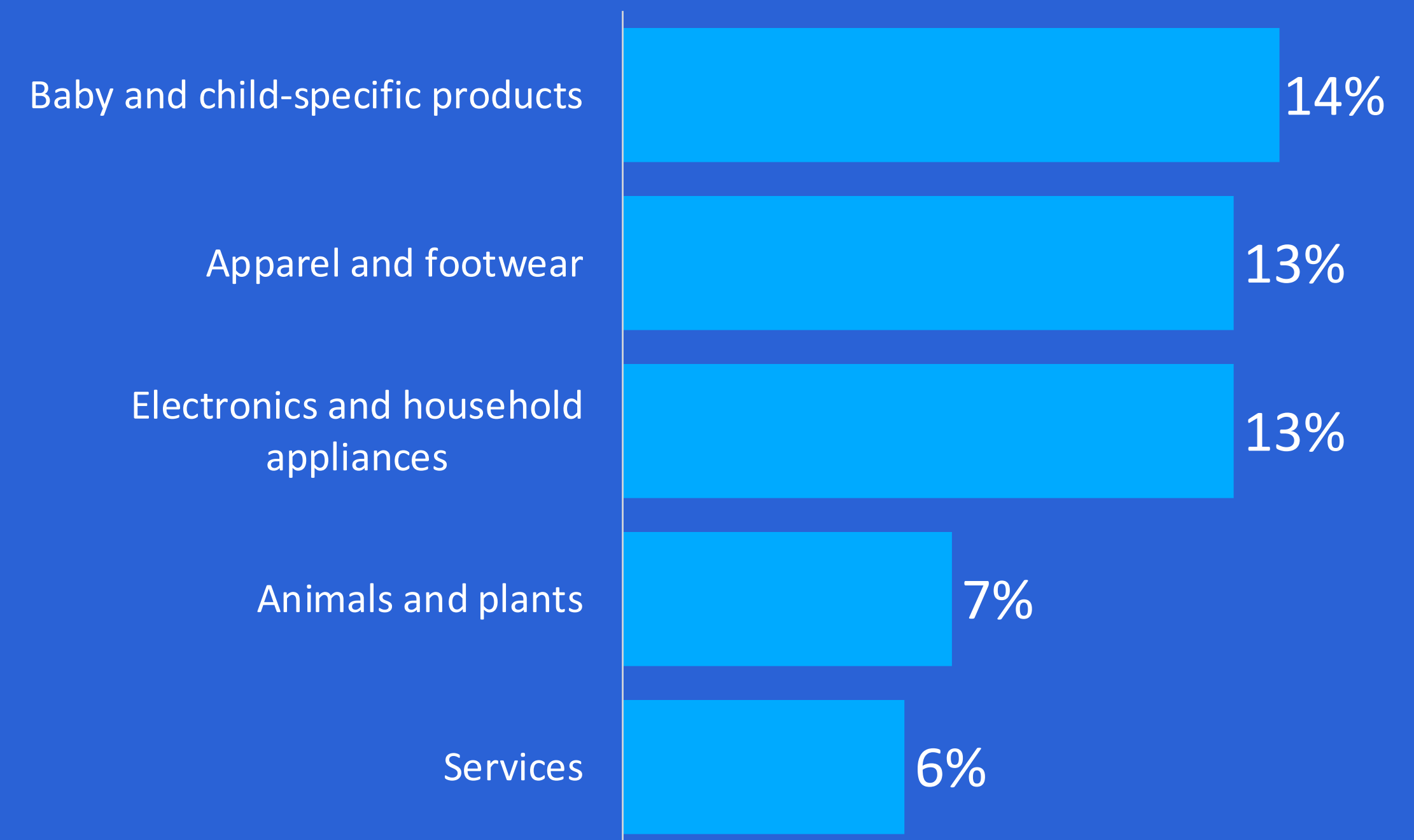
## Top categories of sales



# Youla

- Ranked third by volume of deals in social channels—11%
- The unique audience of purchasers via social channels is 0,7%
- By the percentage of sellers—ranked second after Avito, 39%
- The most popular platform for selling baby and child-specific goods—14%
- Share of new goods in sales volume is 29% (including handmade and excluding food and antique)

## Top categories of sales

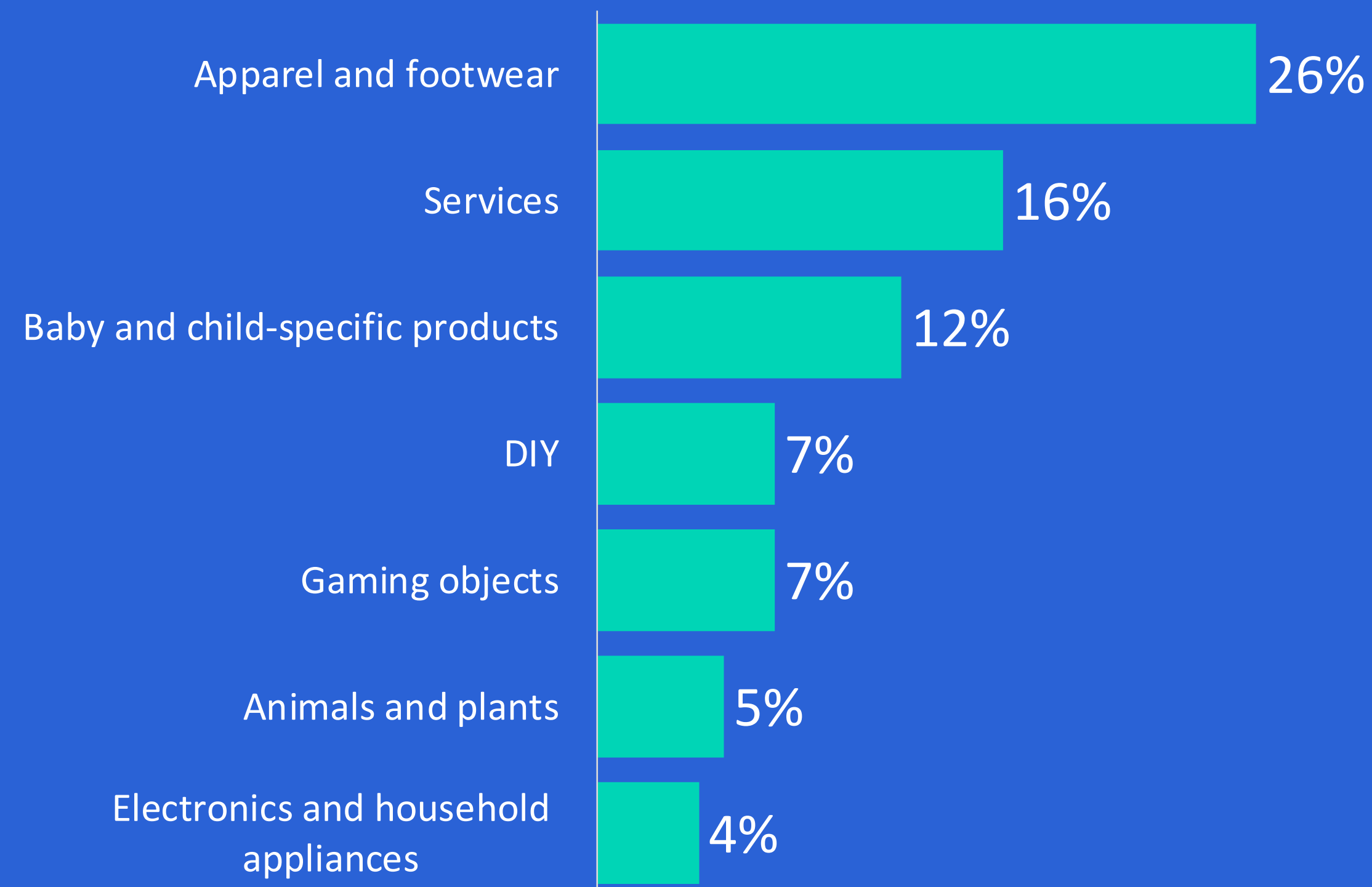




# Odnoklassniki

- Share in sales volume is 3,7%
- By percentage of purchasers in social channels—ranked fourth with 10%. The unique audience of such purchasers is 2,2%
- Percentage of merchants using this social channel is 6% (among all sellers using social channels)
- The most popular platform for selling apparel and services: 26% and 16% respectively
- Percentage of new goods in sales volume is 71% (including handmade and excluding food and antique)

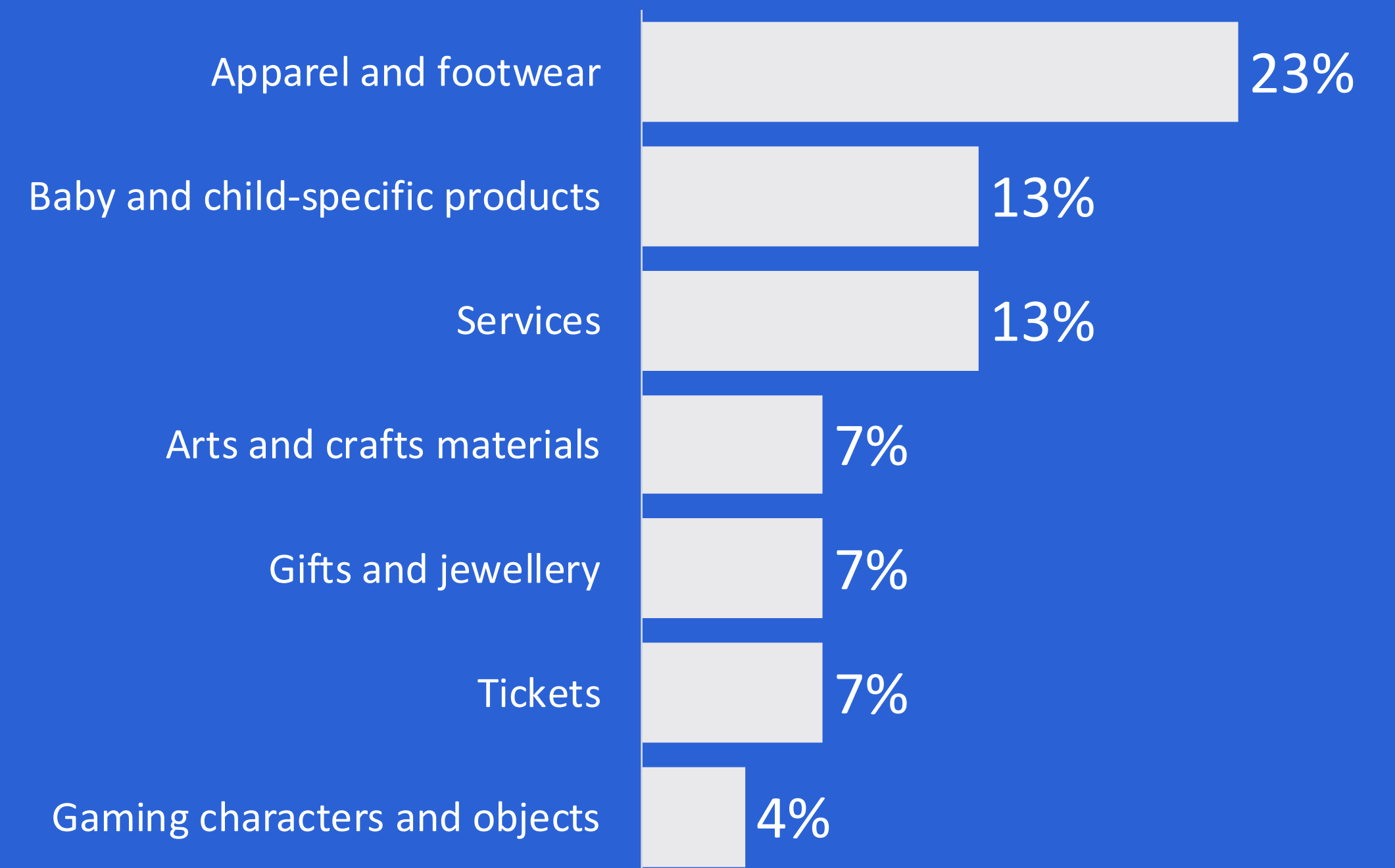
## Top categories of sales



# Instagram

- Share in sales volume is 5,5%
- Percentage of purchasers in social channels is 10% (among all customers using social channels). The unique audience of such purchasers is 1%
- Percentage of merchants using this social channel is 9%
- №1 by share of new goods in overall sales volume—89% (including handmade and excluding food and antique)

## Top categories of sales

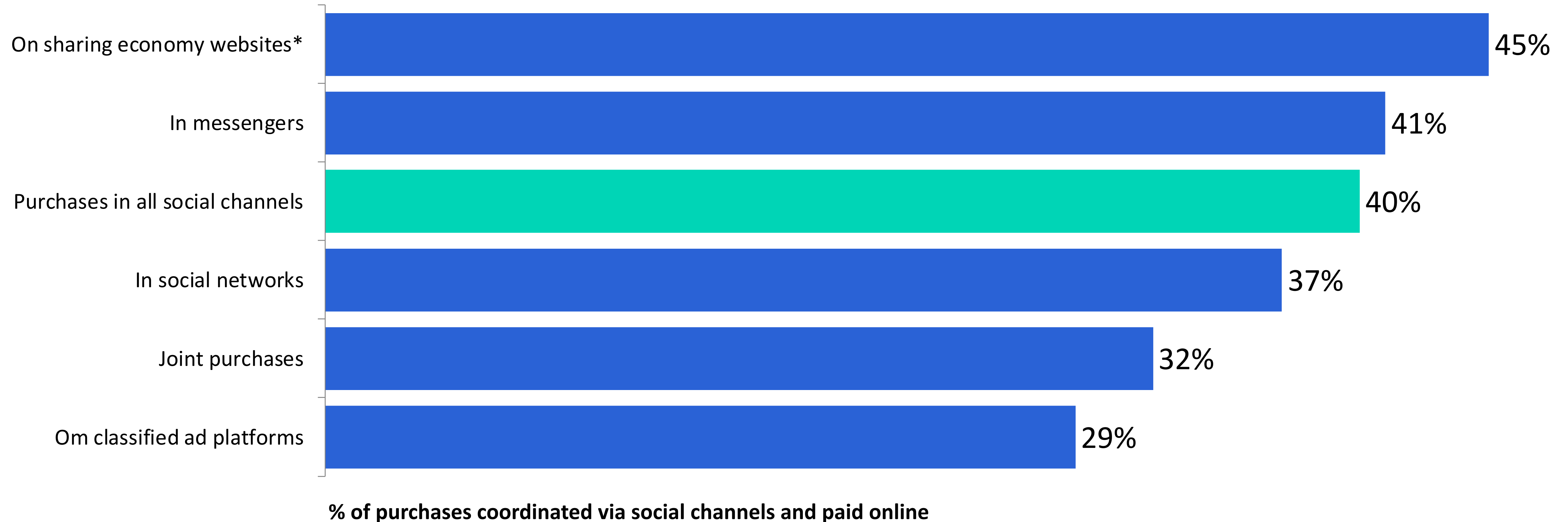


The background features a large, dark blue sphere with a subtle gradient, positioned in the upper right quadrant. The sphere is set against a white background that is partially overlaid by a bright blue geometric shape in the top right corner and a teal geometric shape in the bottom right corner. The overall design is clean and modern.

# Payment methods in social channels

# Percentage of purchases paid online

These purchases are paid online after communication of a buyer and a seller on a social platform, including both payments via social channels and other online payment methods (see the next slide).



Online survey of internet users, 1409 responses. Question: how did you pay for your latest purchase in social channels (instantly on the social platform, or website, or outside)?

\* Sharing economy websites: AirBnB.ru, Profi.ru, YouDo.ru, Remontnik.ru, Pomogatel.ru, BlaBlaCar.ru, BeepCar.ru, Livemaster.ru, Etsy.com

# Payment methods

Cards are used for payment almost as much as cash—every third payment. Every tenth payment is made with e-money (the table below shows % of purchases on social platforms). Social channels offer less payment methods than merchants' websites.

	All purchases (1409 responses)	In a social network (810 responses)	In a messenger (205 responses)	On a classified ad platform (446 responses)	Joint purchases (81 responses)	On sharing economy* website (912 responses)
Cash on delivery/meeting	34%	32%	31%	47%	25%	33%
Online payment or transfer	33%	33%	31%	28%	51%	33%
Payment from e-wallet	11%	12%	16%	8%	5%	13%
Payment to bank account by receipt	8%	10%	12%	7%	15%	8%
Cash via ATM or payment kiosk	4%	4%	5%	4%	2%	4%
Payment on delivery in a post office	3%	3%	3%	2%	0%	3%
Direct carrier billing	3%	3%	0%	2%	1%	3%
Other/Never paid	3%	3%	2%	2%	1%	3%

Online survey among internet users, 1409 responses. Which payment method did you use while purchasing in social channels?

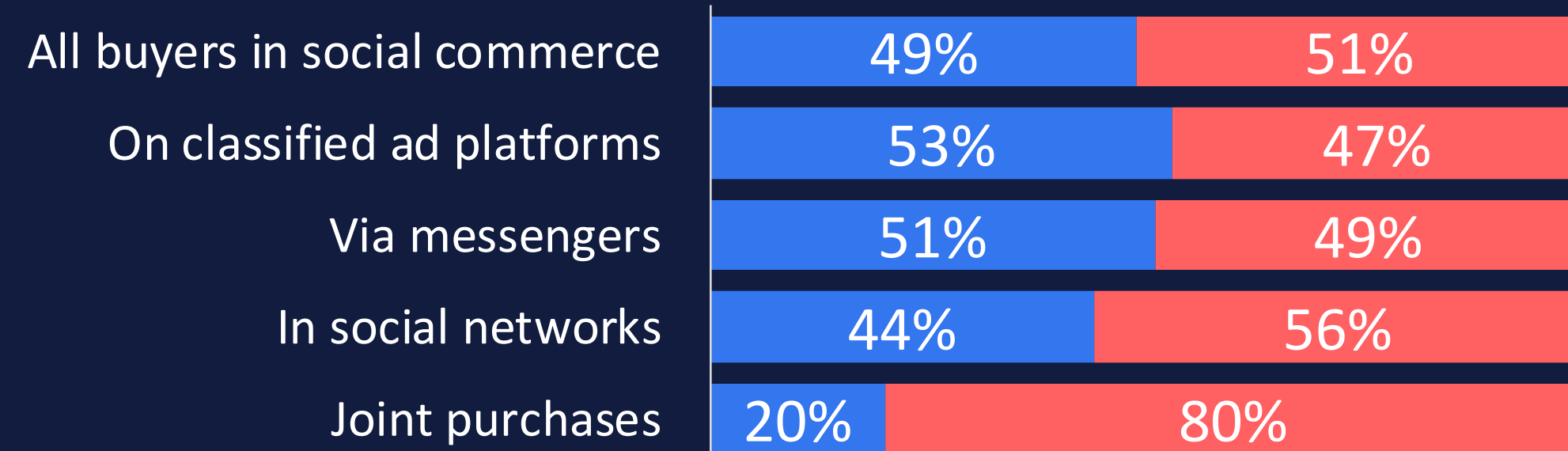
\* AirBnB.ru, Profi.ru, YouDo.ru, Remontnik.ru, Pomogatel.ru, BlaBlaCar.ru, BeepCar.ru, Ярмарка мастеров (Livemaster.ru), Etsy.com



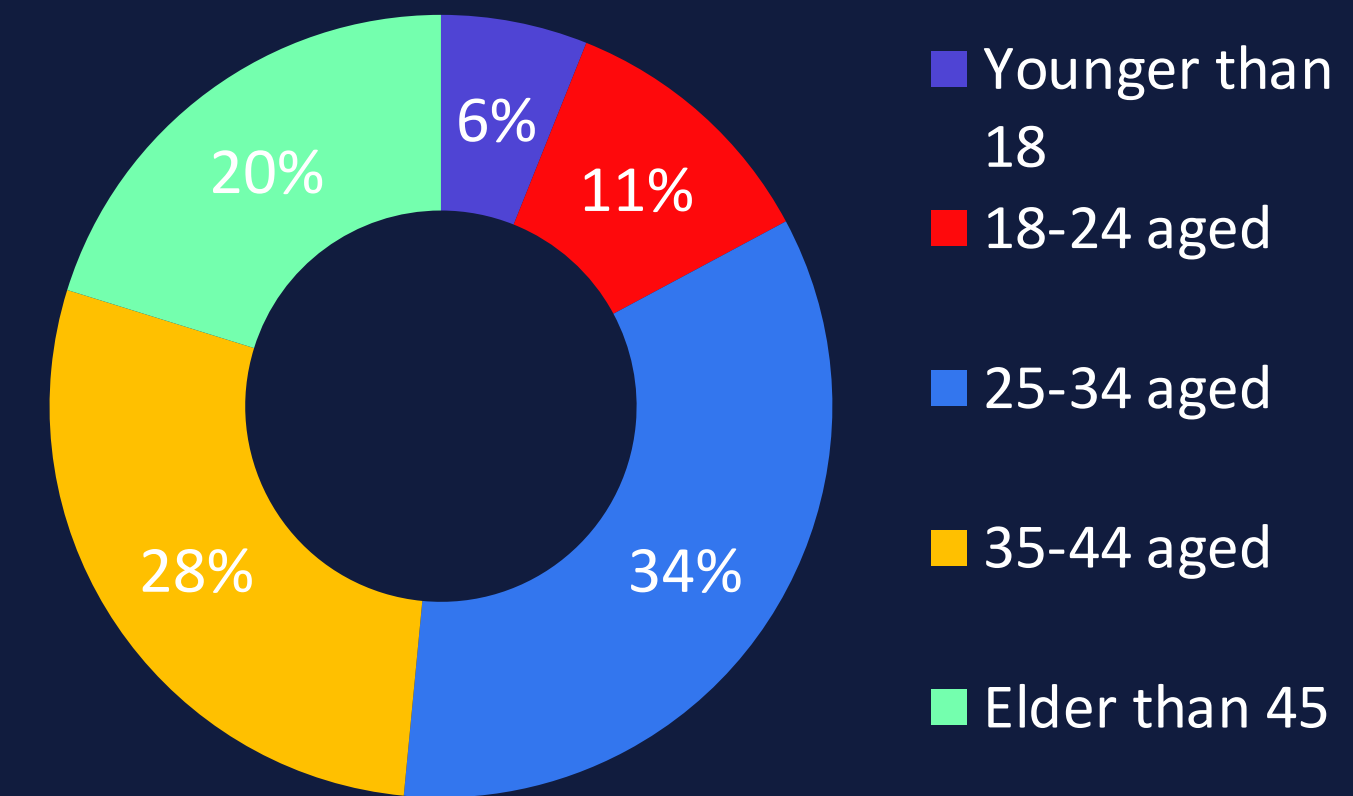
**Annex 1.** Demographic and other characteristics of purchasers

# Purchasers in social channels: demography

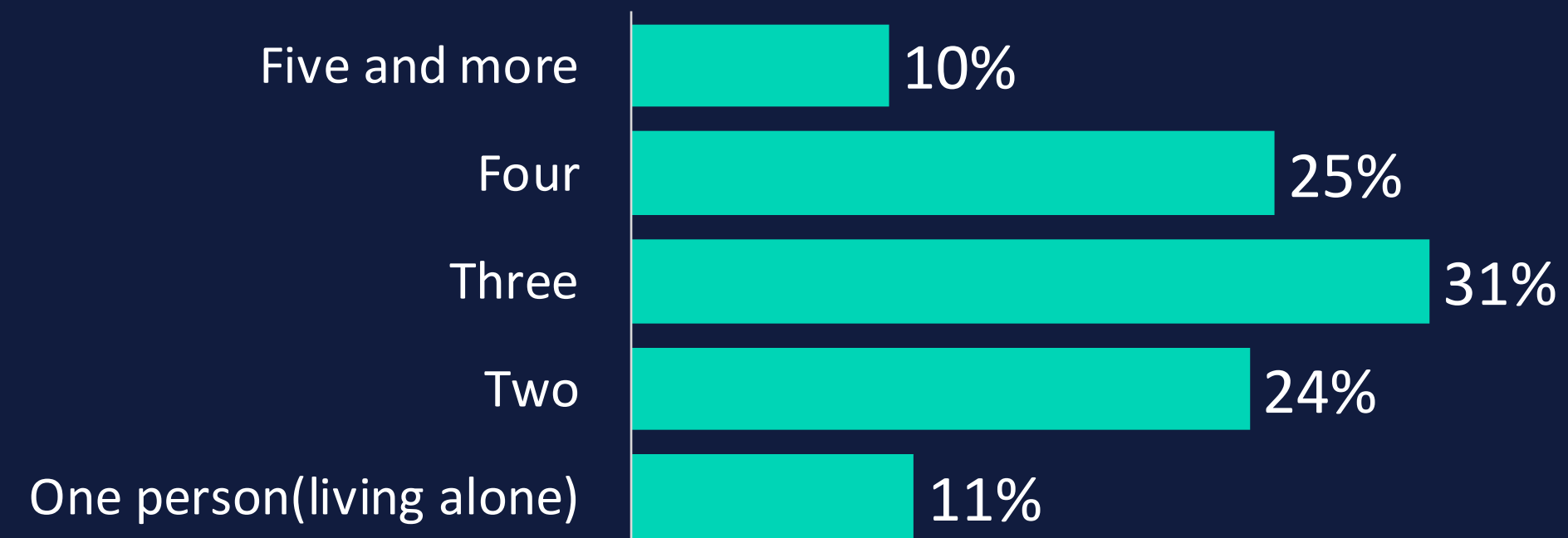
Male/Female



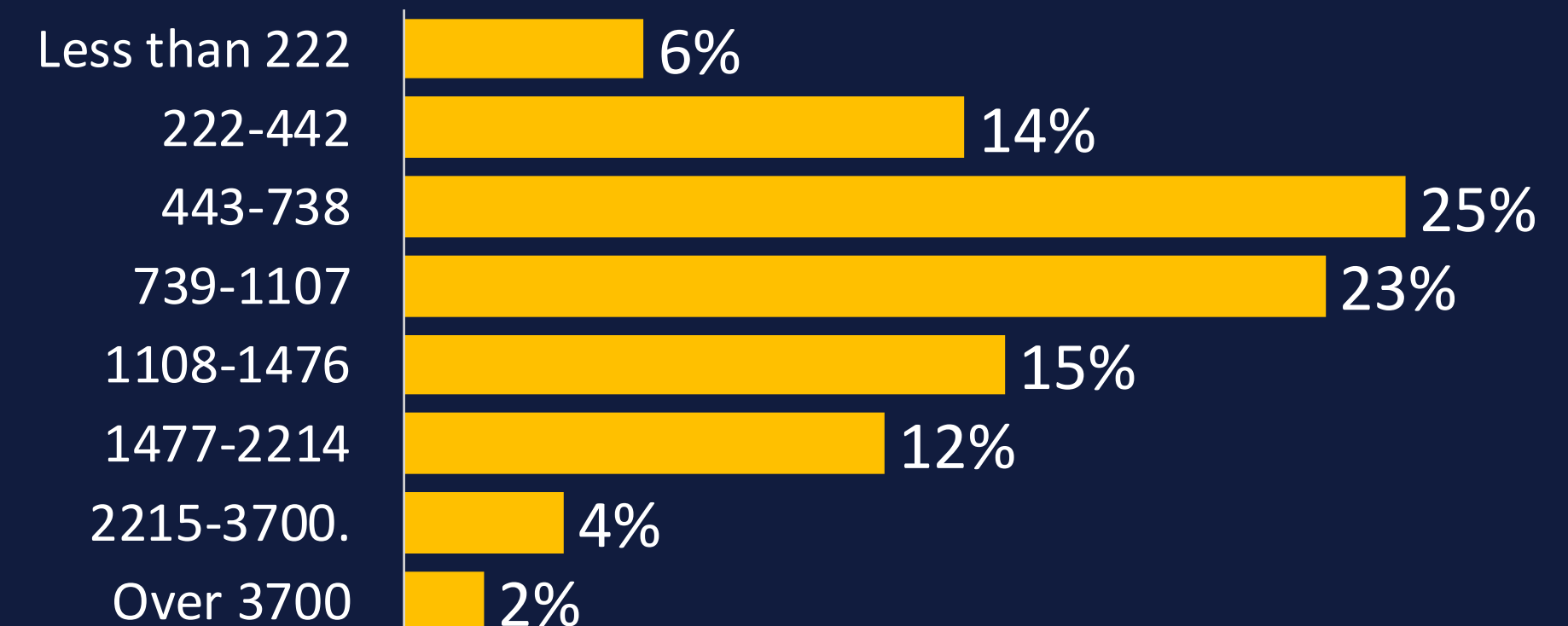
Age



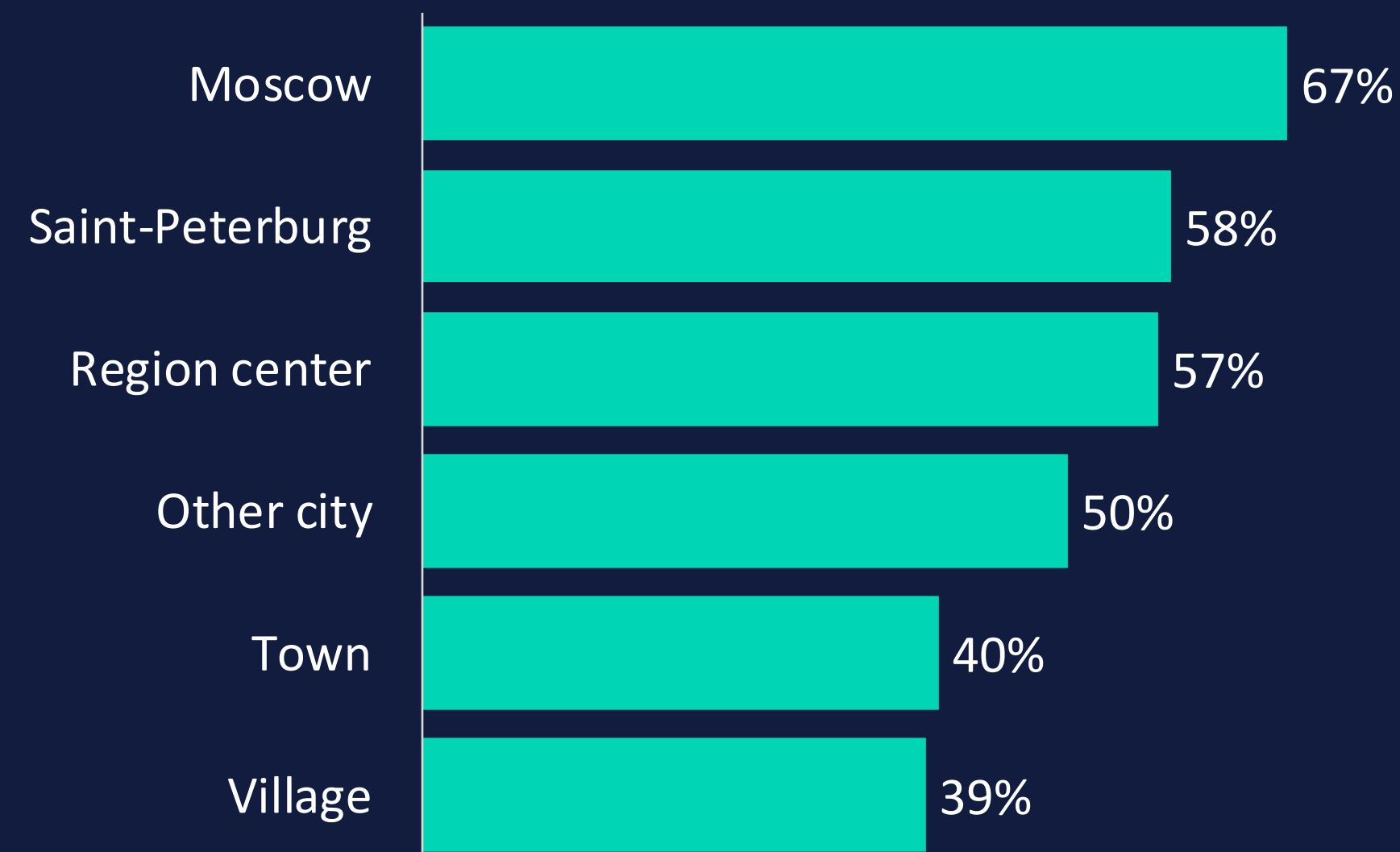
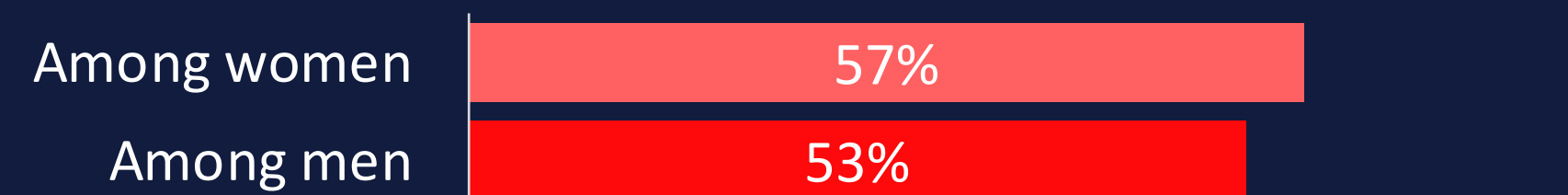
Number of persons per family



Income of family per month, \$



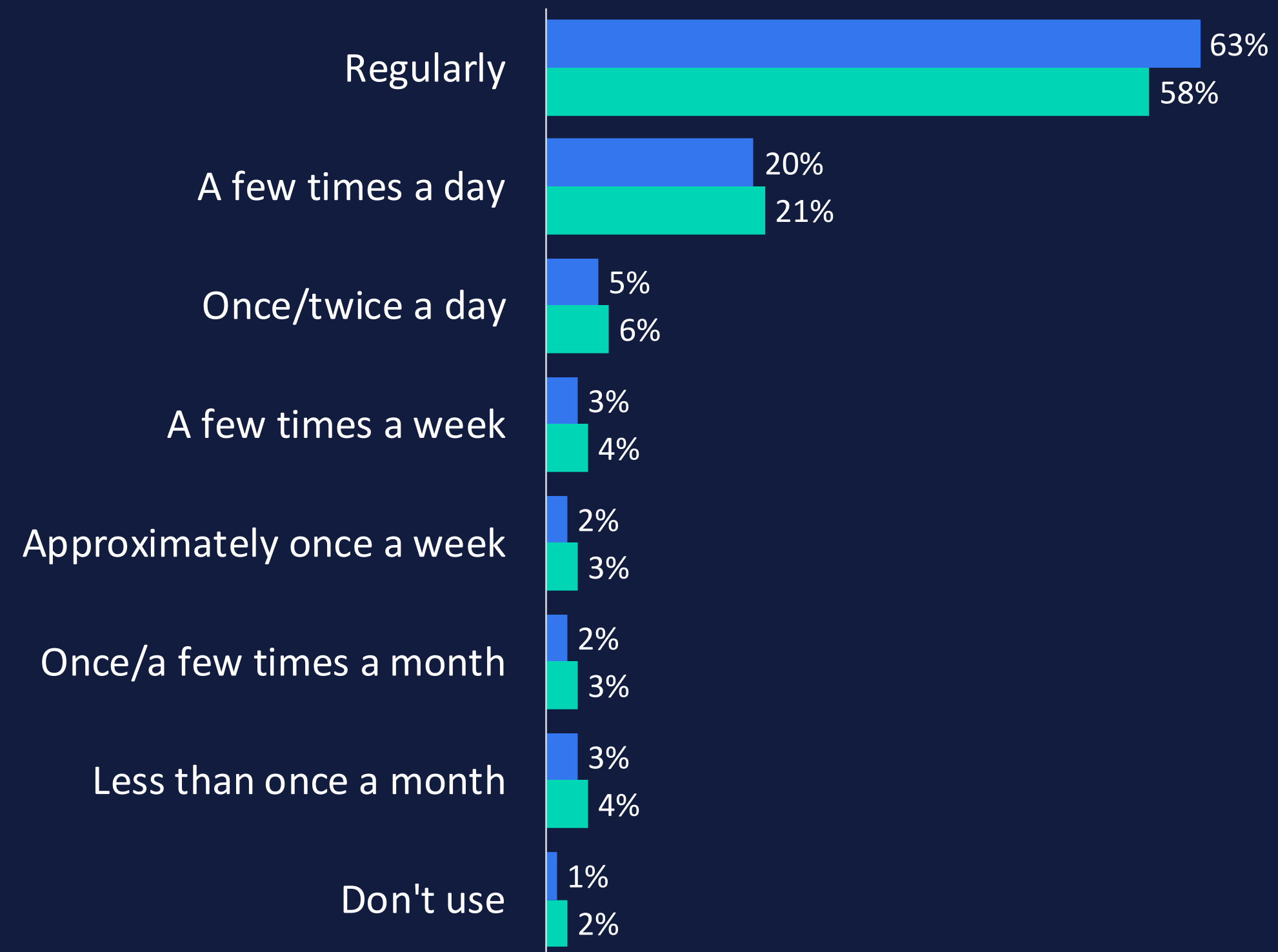
# Penetration of social purchases among different socio-demographic groups





# Portrait of purchasers in social channels

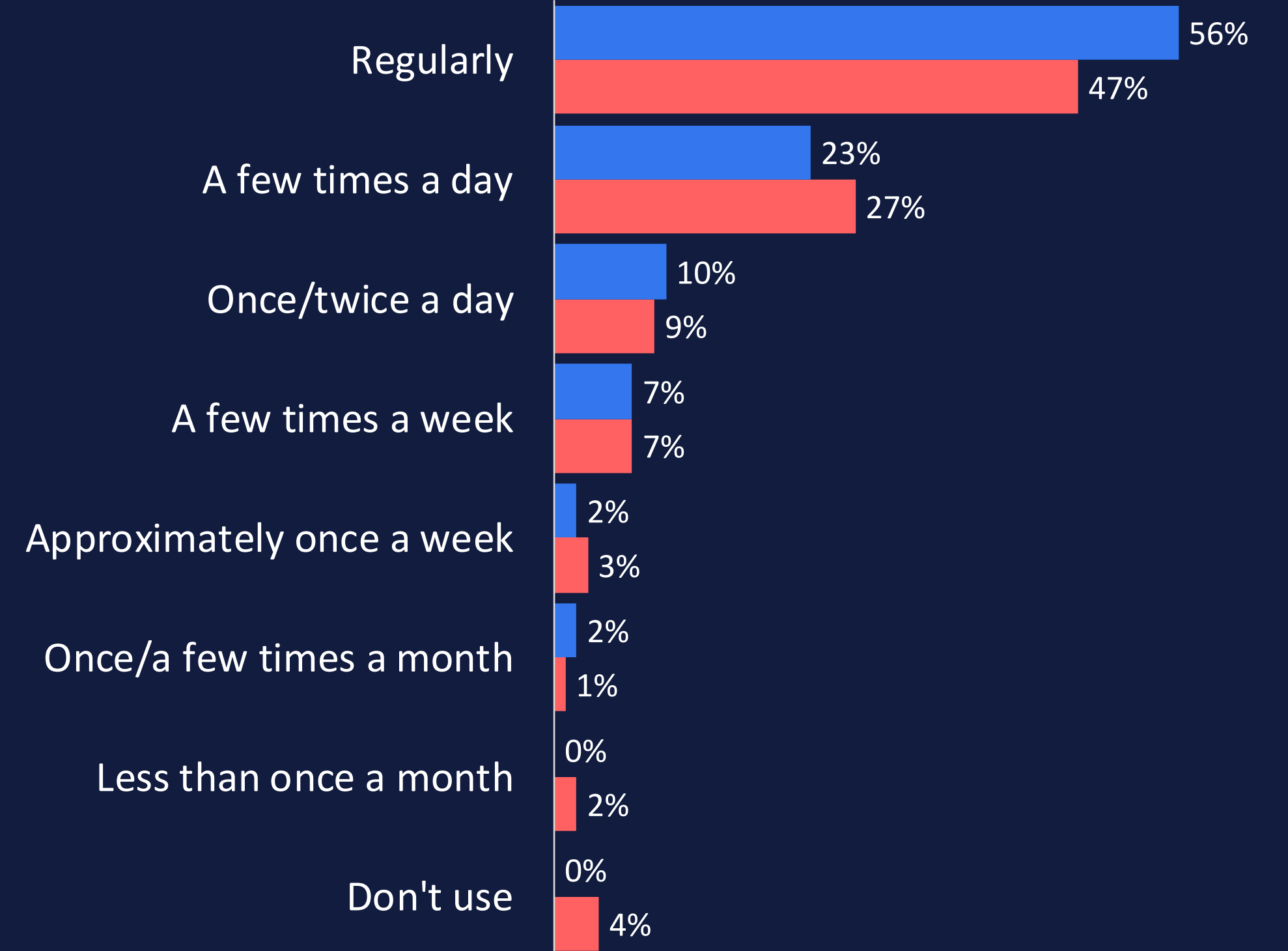
## Frequency of using social networks



■ Purchasers in social channels

■ Purchasers in social commerce

## Frequency of using messengers



■ Purchasers in messengers

■ Purchasers in social commerce