NEW CHALLENGES
NEW SOLUTIONS

RUSSIAN SHOPPERS: CONSUMER SENTIMENT HOLDS STEADY

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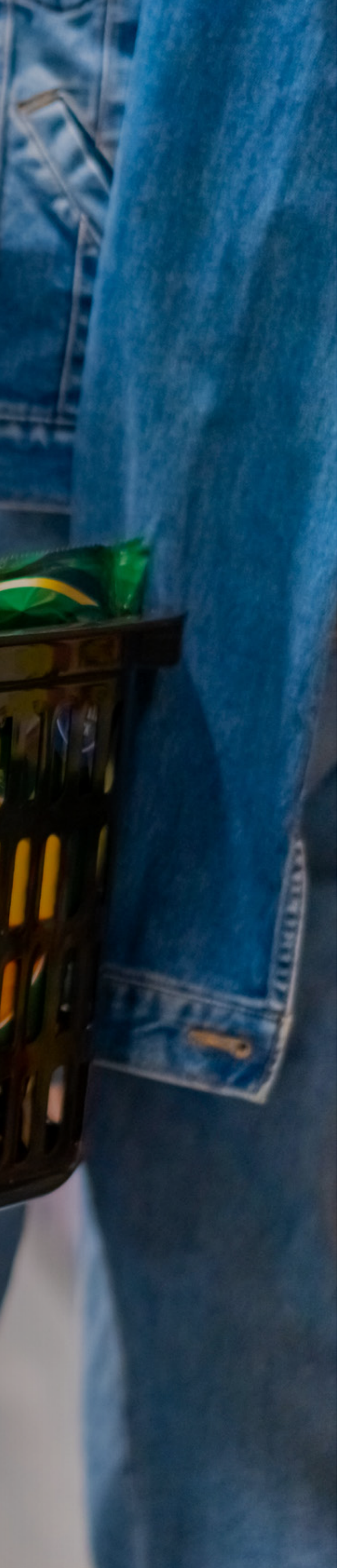


INTRODUCTION

Over the past two and a half years, B1 Group has been surveying Russian consumers every six months to explore their perceptions of changes shaping the local market.

Through four surveys—conducted in autumn 2022, spring and autumn 2023 and spring 2024—we observed that consumers have largely adapted to the shifts that began in early 2022. To examine whether these trends persisted through the end of 2024 and to uncover new developments, we launched the fifth wave of research in November 2024, gathering insights from over 1,000 active Internet users in Russia.

We are pleased to present our findings in this report.

SURVEY FINDINGS

RUSSIA’S CONSUMER MARKET HAS STABILIZED, WITH BOTH CONSUMER CHOICES AND EXPECTATIONS REACHING EQUILIBRIUM

Price and quality continue to be the primary drivers of consumer choices, with food, clothing, footwear and accessories standing out as the most significant categories where these factors have the greatest impact.

Two-thirds of respondents, consistent with last year, have observed a growing variety of Russian-made goods. However, for most, country of origin takes a backseat when it comes to purchasing decisions.

PREFERENCES FOR SHOPPING CHANNELS AND FORMATS HAVE REMAINED STEADY OVER THE PAST SIX MONTHS

For groceries, most respondents continue to rely on offline stores of major retail chains, while non-grocery items are predominantly purchased through online marketplaces or classified sites.

Self-checkout kiosks are gaining momentum as more than half of respondents in cities with populations over 1 million now prefer using them.

Russian consumers' appetite for promotions remains strong, with little change over the past six months.

Private label brands are generally well-liked, but they tend to stand out in specific categories.

Online delivery and click-and-collect services have become a regular part of shopping for nearly half of respondents.

KEY HIGHLIGHTS

92%

AMONG OUR RESPONDENTS, 92% CITED PRICE AS A KEY FACTOR IN THEIR PURCHASING DECISIONS, AND 82% POINTED TO QUALITY.

While the focus on quality has remained steady since spring 2024, the significance of price has declined slightly from 95% in the previous survey.

80%

WHEN ASKED ABOUT THE IMPORTANCE OF PRICE AND QUALITY FOR CERTAIN PRODUCT CATEGORIES, RESPONDENTS SURVEYED IN AUTUMN 2024 RANKED FOOD AND GROCERIES HIGHEST (79% – PRICE AND 80% – QUALITY),

followed by clothing, footwear and accessories (45% and 47%).

66%

TWO-THIRDS OF RESPONDENTS NOTE A GROWING VARIETY OF RUSSIAN-MADE GOODS.

30%

COMPARED WITH SPRING 2024, 30% OF RESPONDENTS ARE NOW PLANNING BIG-TICKET PURCHASES IN THE NEXT SIX MONTHS, UP BY 3 PERCENTAGE POINTS.

62%

MAJOR RETAIL CHAINS ARE THE TOP CHOICE FOR GROCERY SHOPPING, WITH 48% TO 62% OF RESPONDENTS, DEPENDING ON THE PRODUCT CATEGORY,

making their purchases there, while 26% to 41% prefer local convenience stores.

58%

FOR NON-GROCERY ITEMS, 35% TO 58% OF RESPONDENTS TURN TO ONLINE MARKETPLACES OR CLASSIFIED SITES, DEPENDING ON THE PRODUCT CATEGORY.

69%

WHILE 69% OF RESPONDENTS STILL USE REGULAR CASHIER CHECKOUTS,

53% opt for self-checkout kiosks.

62%

PROMOTIONS ATTRACT 62% OF SHOPPERS,

a figure that has stayed consistent since spring 2024.

52%

PRIVATE LABEL PRODUCTS ARE MOST POPULAR IN FOOD CATEGORIES LIKE DAIRY PRODUCTS (52% OF RESPONDENTS) AND DRY GROCERIES (40%).

For non-food items, the leading categories are home cleaning and laundry supplies (47%), and personal care, perfume and beauty products (42%).

48%

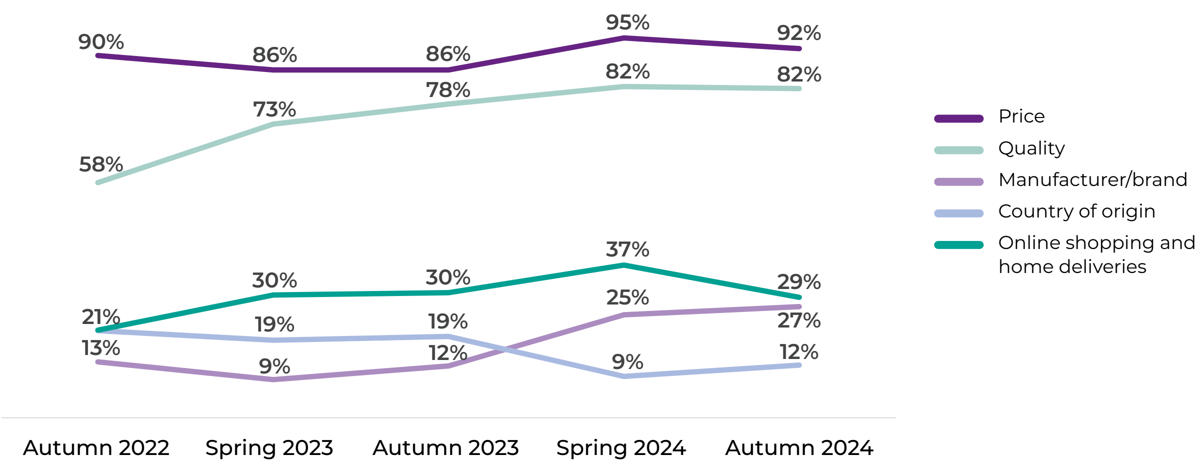
ONLINE DELIVERY SERVICES ARE USED BY 48% OF RESPONDENTS,

and 52% take advantage of click-and-collect.

PRICE AND QUALITY CONTINUE TO REIGN SUPREME IN PURCHASING DECISIONS

OUR SURVEY REVEALS THAT PRICE AND QUALITY ARE FRONT AND CENTER IN CONSUMER DECISION-MAKING, WITH 92% OF RESPONDENTS HIGHLIGHTING PRICE AND 82% EMPHASIZING QUALITY.

WHAT ARE THE KEY DRIVERS OF YOUR PURCHASING DECISION?
(Select all that apply.)



Since autumn 2023, more consumers have started considering the manufacturer or brand when making purchases. By the end of 2024, 27% of respondents cited this as a significant factor, with the figure rising to 32%–33% among 18-34-year-olds and reaching 48% among those with monthly household incomes exceeding 150,000 rubles per person.

Meanwhile, the influence of country of origin has diminished. Since 2024, the percentage of consumers prioritizing this aspect has almost halved, dropping from 19% in 2023 to 12% by autumn 2024.

The option to shop online and have products delivered remains important for about a third of respondents, although its relevance has decreased from 37% in spring 2024 to 29% by the end of the year. As online shopping and delivery become more commonplace, consumers are focusing less on how they receive their orders and more on core attributes like price and quality—especially as long as delivery remains free and is not viewed as a significant additional cost.

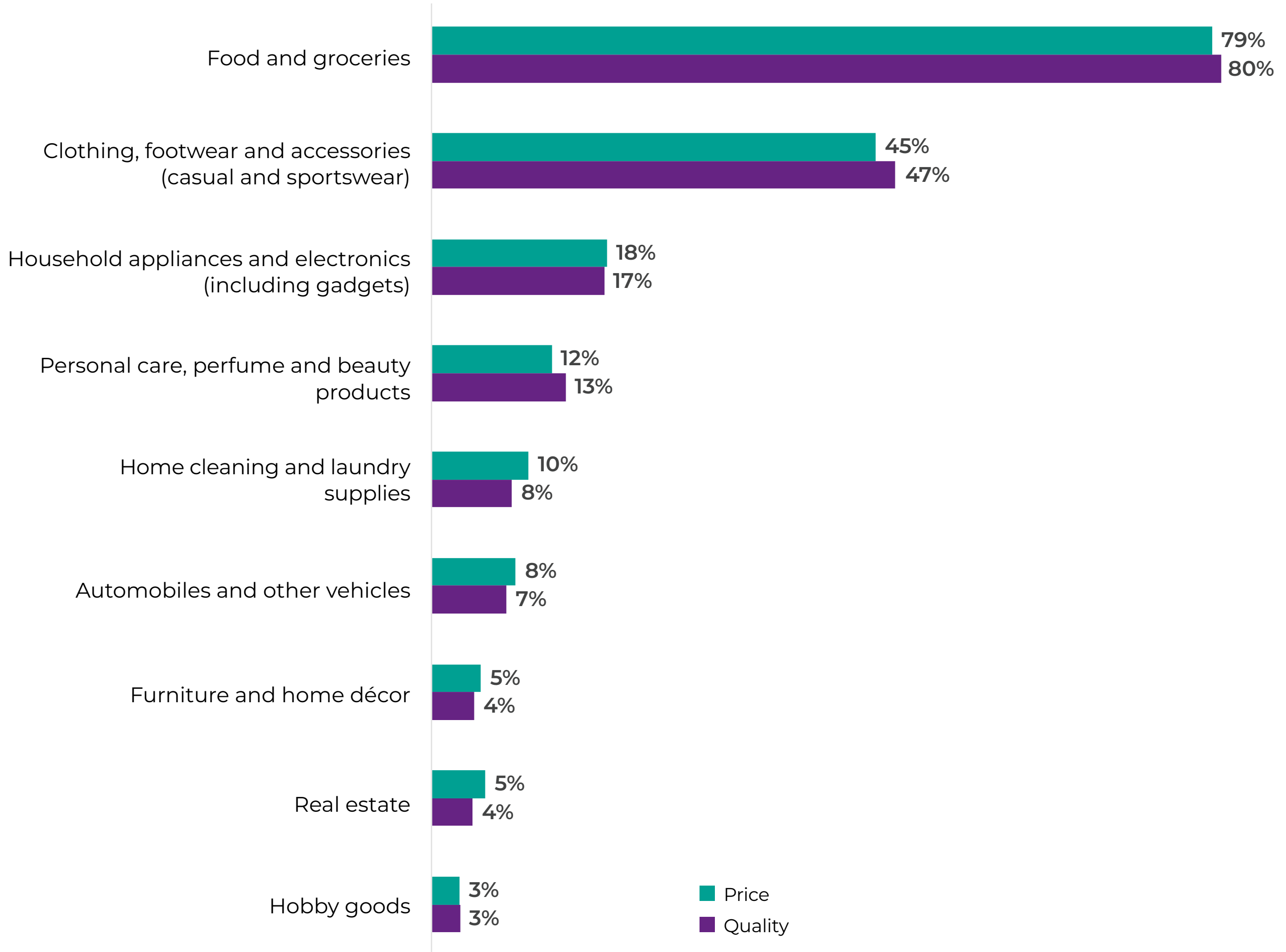
We also explored how respondents feel about in-store pickup for online orders.

Fourteen percent said this option influences their purchasing decisions—a key takeaway for retailers looking to reduce delivery costs and encourage customers to collect their purchases themselves.

When asked what product categories will see the greatest emphasis on price and quality in the near future, 79% and 80% of respondents in autumn 2024 pointed to food and groceries, while 45% and 47% chose clothing, footwear and accessories. Interestingly, in both categories, consumers placed a higher emphasis on quality than on price.

WHAT PRODUCTS WILL MATTER MOST TO YOU IN THE NEXT YEAR IN TERMS OF PRICE AND QUALITY?

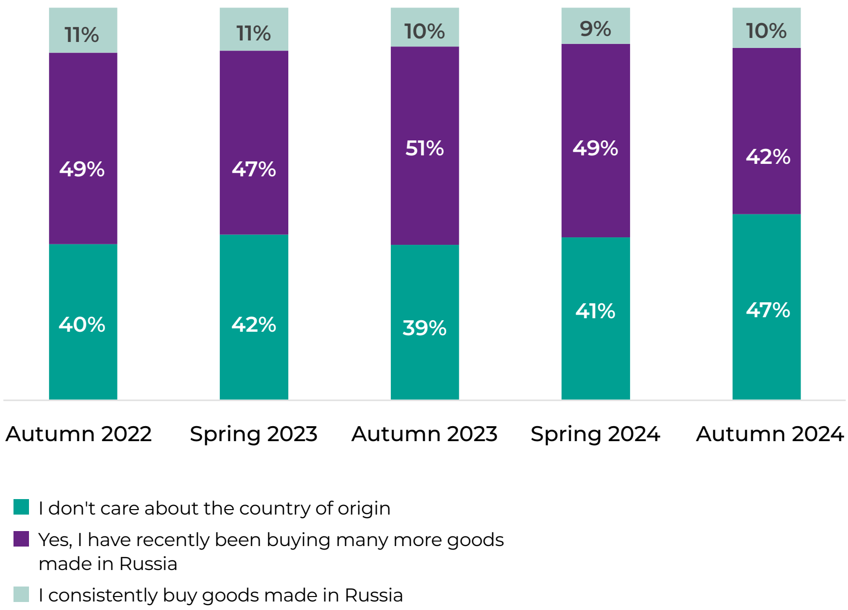
(Select all that apply.)



MOST CONSUMERS NOTE A GROWING VARIETY OF RUSSIAN-MADE GOODS, BUT COUNTRY OF ORIGIN RANKS LOW AMONG THEIR PURCHASING CONSIDERATIONS

AS SUGGESTED BY THE DATA ABOVE, COUNTRY OF ORIGIN DOES NOT PLAY A MAJOR ROLE IN SHAPING BUYERS' DECISIONS.

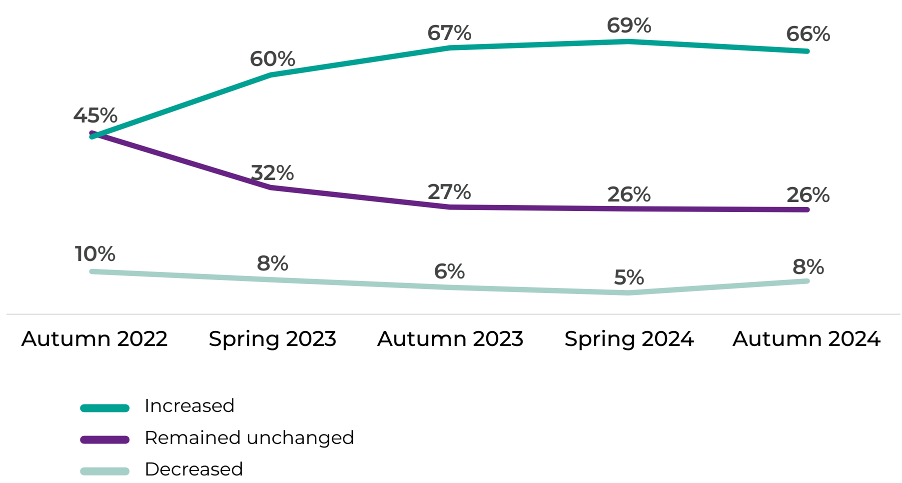
ARE YOU NOW BUYING MORE GOODS MADE IN RUSSIA?



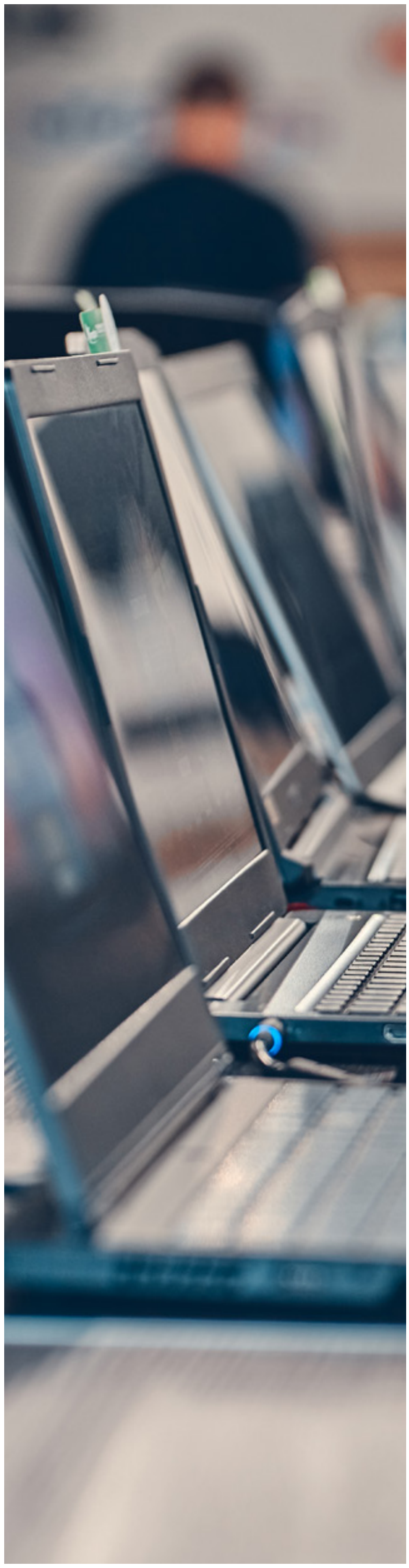
However, a notable 42% of respondents report buying more Russian-made goods recently, with 10% consistently opting for them. Loyalty to local produce is particularly strong among those aged 45 and older.

ARE YOU NOW BUYING MORE GOODS MADE IN RUSSIA?

WHAT CHANGES DO YOU OBSERVE IN TERMS OF THE VARIETY OF GOODS MADE IN RUSSIA?



Additionally, 66% of respondents believe the selection of Russian-made products has expanded, a sentiment that has remained consistent since autumn 2023.

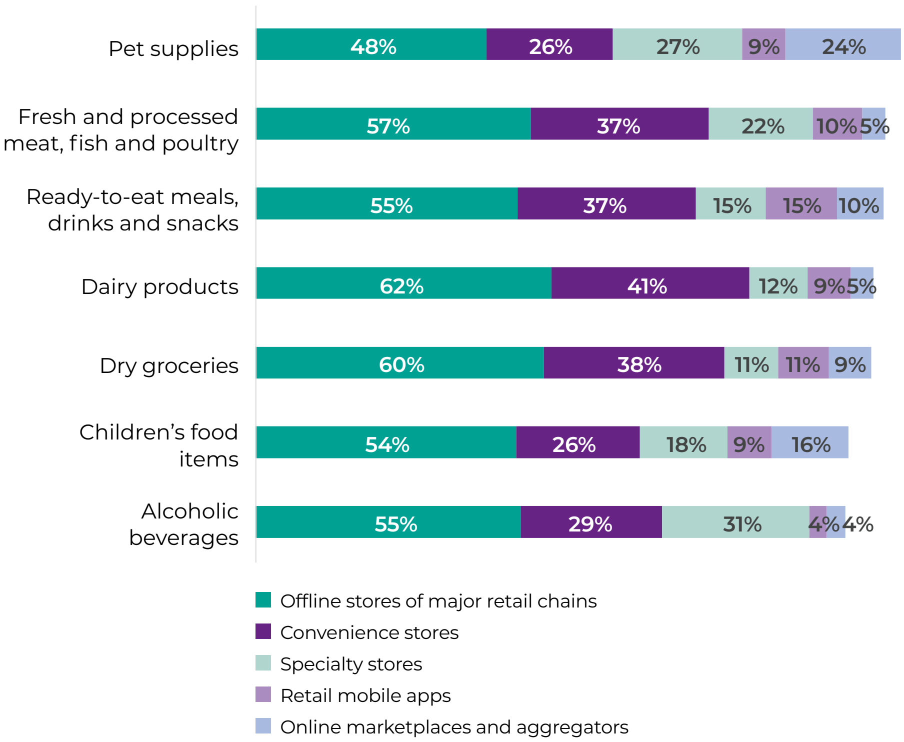


GROCERIES STAY OFFLINE, NON-GROCERIES MOVE ONLINE

WHEN IT COMES TO GROCERY SHOPPING, MAJOR RETAIL CHAINS ARE THE PREFERRED CHOICE FOR 48% TO 62% OF RESPONDENTS, DEPENDING ON THE PRODUCT CATEGORY, WHILE 26% TO 41% OPT FOR LOCAL CONVENIENCE STORES. DAIRY PRODUCTS, AS WELL AS FRESH AND PROCESSED MEAT, FISH AND POULTRY ARE THE MOST POPULAR CATEGORIES IN THESE FORMATS.

WHERE AND HOW DO YOU MOST FREQUENTLY SHOP FOR FOOD THESE DAYS?

(Select all that apply.)

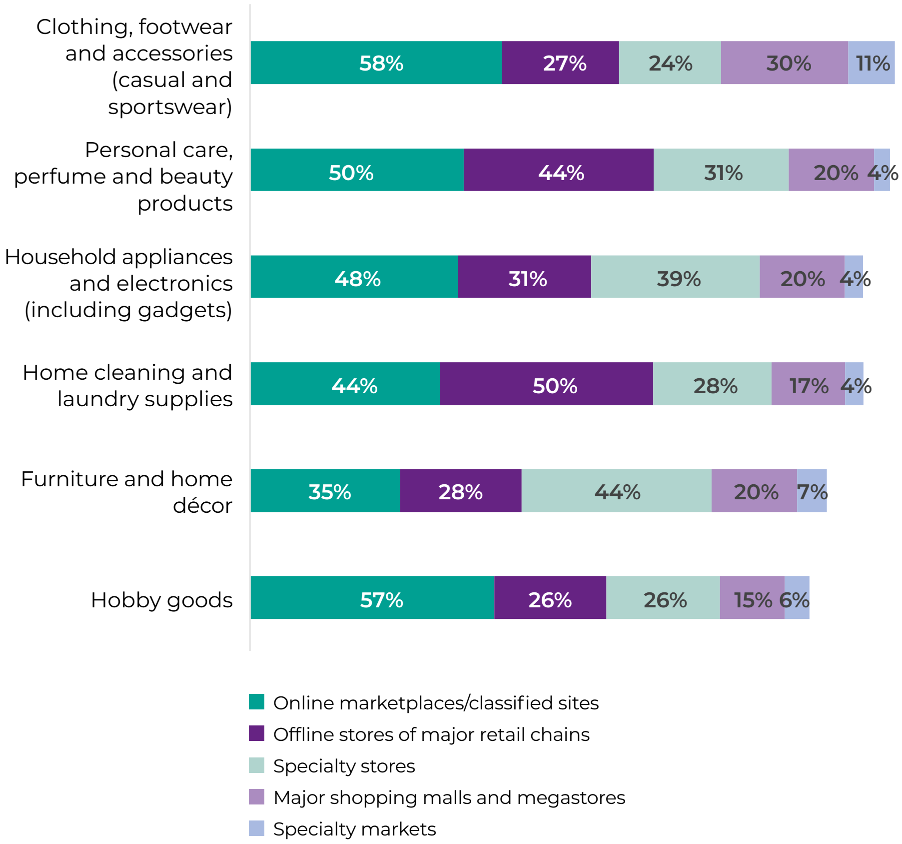


Specialty stores draw shoppers for alcohol (31%) and pet supplies (24%), while mobile apps are mainly used for ordering ready-to-eat meals, drinks and snacks (15%).

For non-food items, respondents primarily shop on online marketplaces and classified sites (35%–58%, depending on the category) or at offline stores of major retail chains (26%–50%). Clothing, footwear and accessories are mostly bought online (58%), whereas home cleaning and laundry supplies lead offline (50%). The top categories for specialty stores are furniture and home décor (44%) and household appliances and electronics (39%).

WHERE AND HOW DO YOU MOST FREQUENTLY SHOP FOR NON-FOOD ITEMS THESE DAYS?

(Select all that apply.)

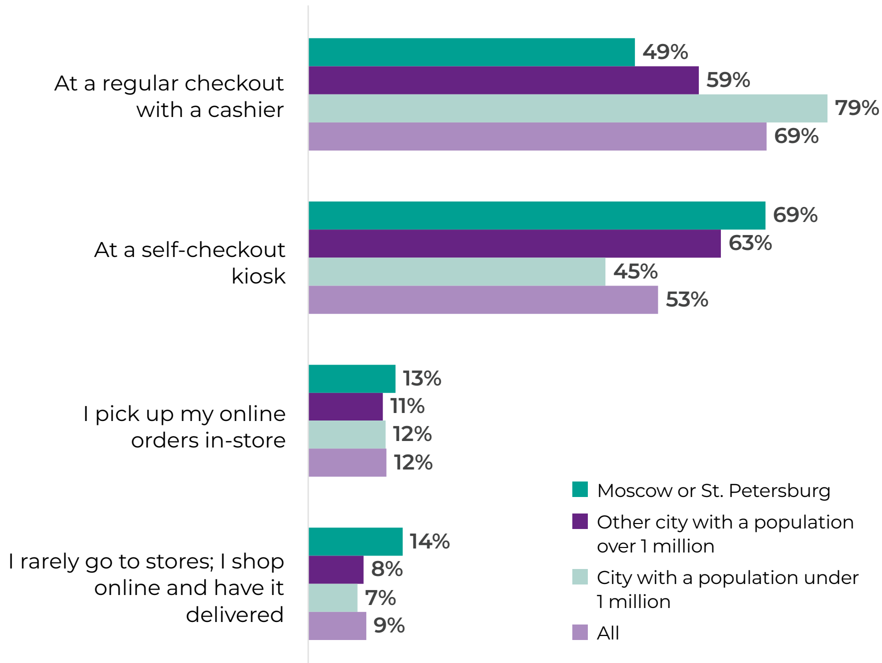


SELF-CHECKOUT KIOSKS ARE GAINING GROUND IN RETAIL STORES

WHILE SELF-CHECKOUT KIOSKS HAVE BECOME MORE COMMON, 69% OF RESPONDENTS STILL PREFER TRADITIONAL CASHIER CHECKOUTS.

However, preference for self-checkout has jumped from 34% to 53% in just six months, indicating that consumers are becoming increasingly comfortable with this format and using it more often. In Moscow and St. Petersburg, fewer than half of shoppers opt for regular cashier counters, while in smaller cities (with populations under 1 million), traditional checkout remains dominant, with 79% sticking to it.

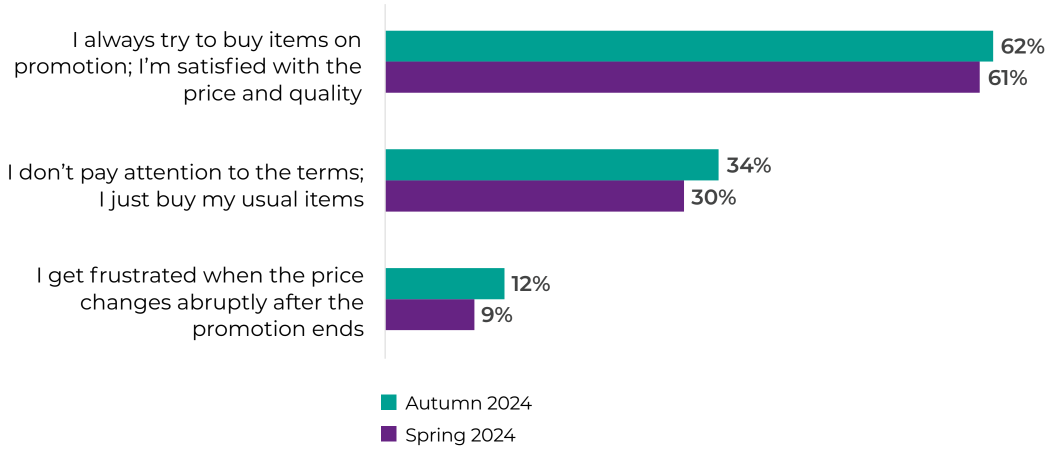
HOW DO YOU TYPICALLY CHECK OUT WHEN SHOPPING IN-STORE?
(Select all that apply.)



CONSUMER APPETITE FOR PROMOTIONS REMAINS STRONG, WITH LITTLE CHANGE OVER THE PAST SIX MONTHS

OVER HALF OF RESPONDENTS (62%) ARE ALWAYS ON THE LOOKOUT FOR BARGAINS, SATISFIED WITH BOTH THE PRICE AND QUALITY OF PROMOTIONAL PRODUCTS.

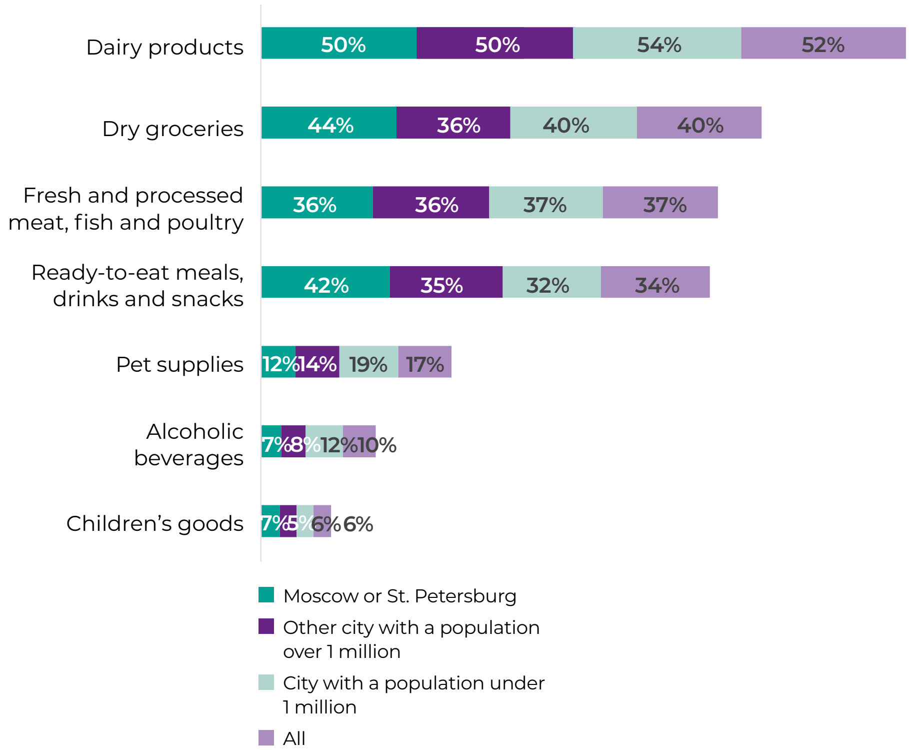
WHAT DO YOU THINK ABOUT PRODUCT AND MANUFACTURER PROMOTIONS IN STORES?



PRIVATE LABEL BRANDS ARE GENERALLY WELL-LIKED, BUT THEY TEND TO STAND OUT IN SPECIFIC CATEGORIES

ACROSS ALL GEOGRAPHIES, A NOTABLE PORTION OF RESPONDENTS TURN TO PRIVATE LABEL BRANDS IN DAIRY PRODUCTS (52%) AND DRY GROCERIES (40%), REFLECTING THEIR CONFIDENCE IN THE QUALITY AND COMPETITIVE PRICING OF RETAILER OFFERINGS IN THESE CATEGORIES.

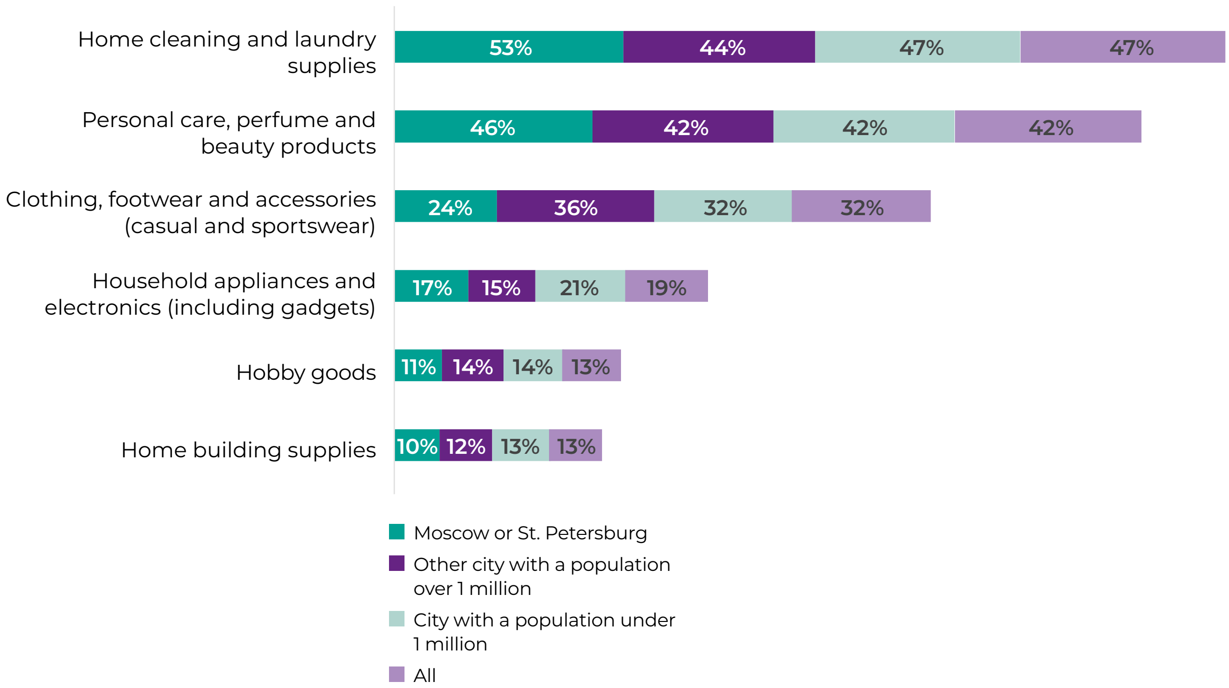
IN WHAT FOOD CATEGORIES DO YOU BUY PRIVATE LABEL PRODUCTS?
(Select all that apply.)

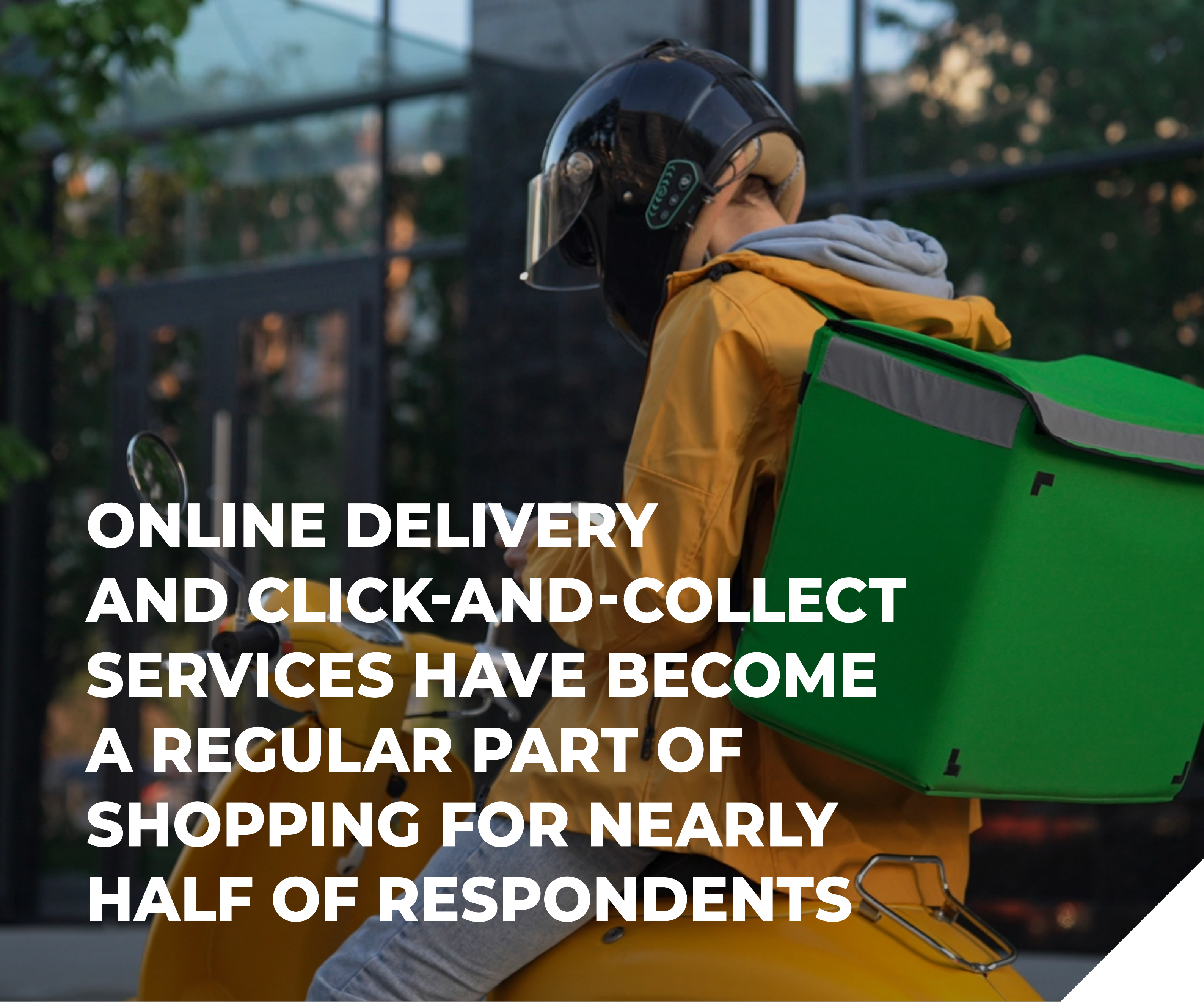


For non-food items, many consumers favor private label products in categories like home cleaning and laundry supplies (47%), and personal care, perfume and beauty products (42%). However, in Moscow and St. Petersburg, shoppers are less inclined to choose private labels for higher-priced categories such as clothing, footwear and accessories (24%) and household appliances and electronics (17%), as well as for specialty items like hobby goods (11%) and home building supplies (10%).

IN WHAT NON-FOOD CATEGORIES DO YOU BUY PRIVATE LABEL PRODUCTS?

(Select all that apply.)





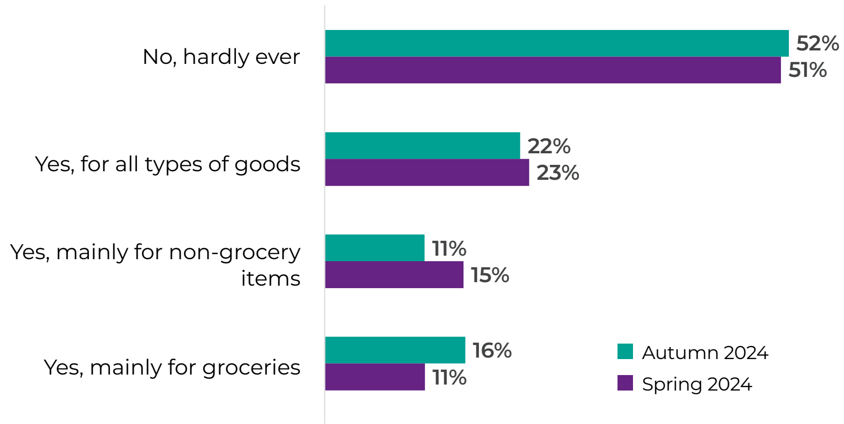
ONLINE DELIVERY AND CLICK-AND-COLLECT SERVICES HAVE BECOME A REGULAR PART OF SHOPPING FOR NEARLY HALF OF RESPONDENTS

RISING TO PROMINENCE DURING THE COVID-19 PANDEMIC, ONLINE ORDERING AND DELIVERY SERVICES CONTINUE TO THRIVE, PARTICULARLY IN THE GROCERY SEGMENT.

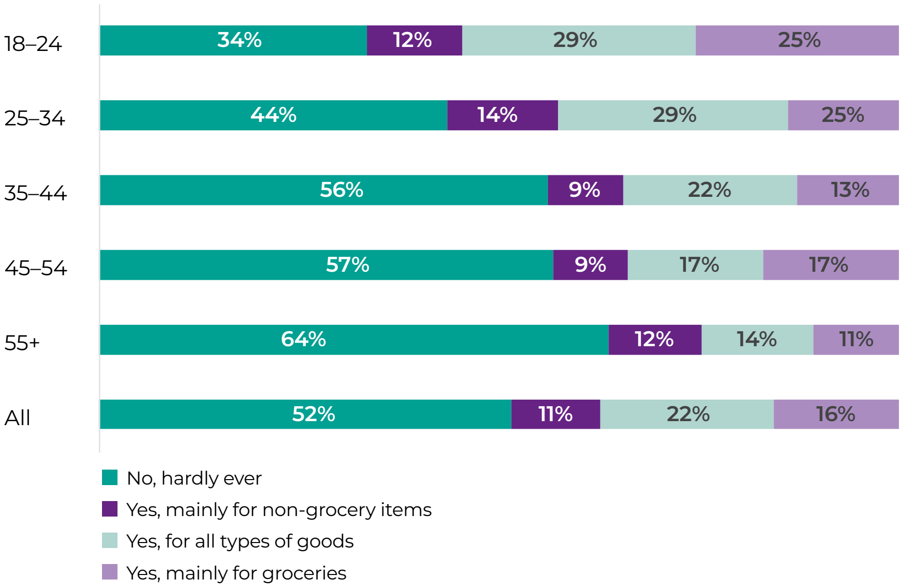
Around half (48%) of respondents use these services, with 22% buying all types of goods this way.

Younger consumers are almost twice as likely to use online delivery services as older generations, highlighting a clear age divide.

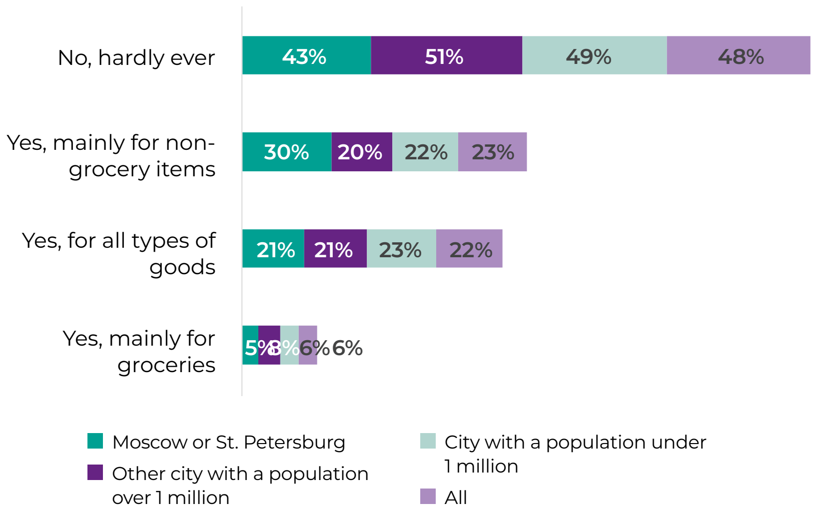
DO YOU USE DELIVERY SERVICES FOR ITEMS ORDERED ONLINE?



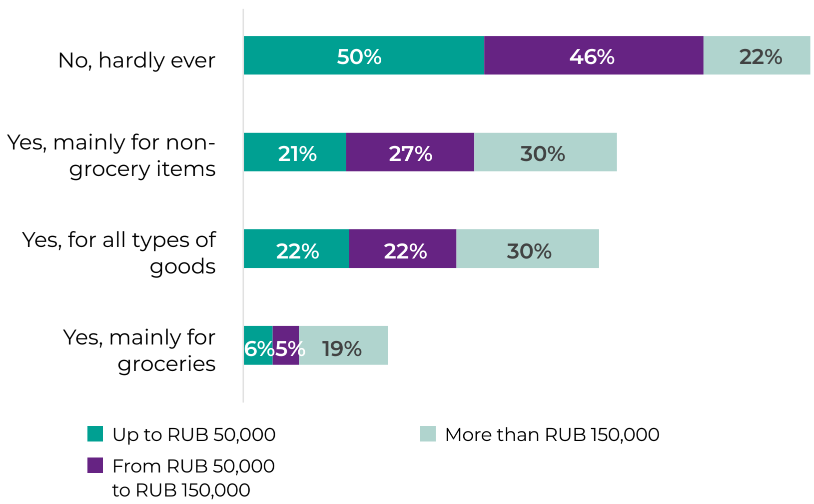
DO YOU USE DELIVERY SERVICES FOR ITEMS ORDERED ONLINE?



DO YOU USE CLICK-AND-COLLECT SERVICES?

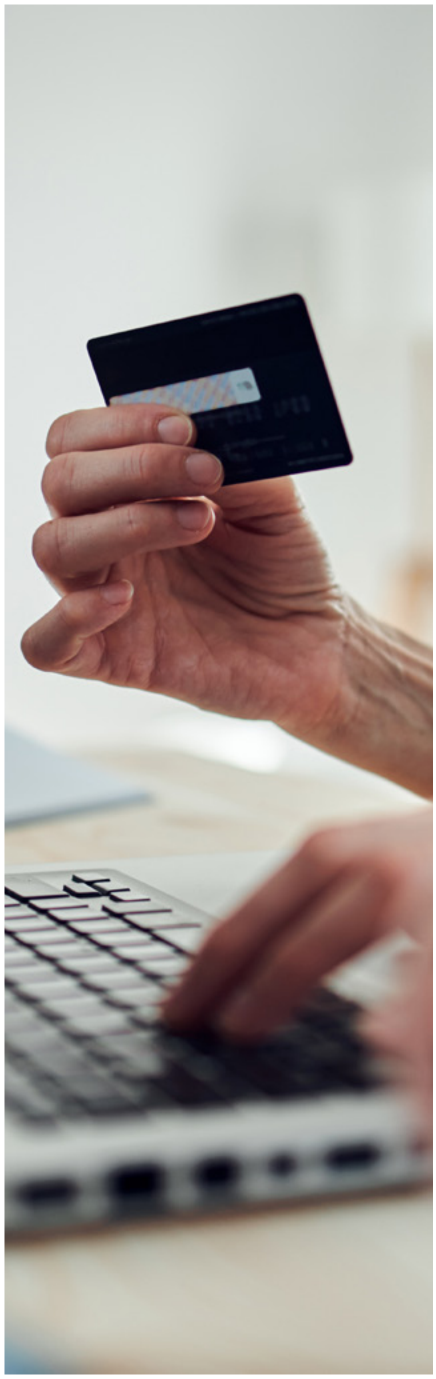


DO YOU USE CLICK-AND-COLLECT SERVICES?



On average, 52% of respondents use click-and-collect services, with this trend even more pronounced in major cities: in Moscow and St. Petersburg, 57% of shoppers prefer to pick up their online orders themselves.

Click-and-collect is especially popular among respondents with a monthly household income above 150,000 rubles per person, who choose this option for grocery orders nearly four times as often (19% versus 5%–6%).



CONCLUSION

PRICE AND QUALITY CONTINUE TO BE THE PRIMARY FACTORS INFLUENCING PURCHASING DECISIONS FOR CONSUMER GOODS.

Groceries are predominantly purchased in offline stores of major retail chains, while non-grocery items are mostly bought through online marketplaces or classified sites.

Interest in promotions remains high and largely unchanged over the past six months.

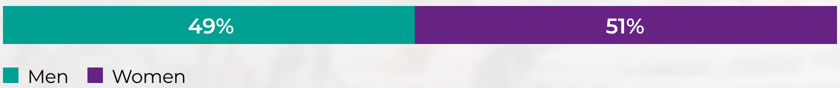
Consumers generally favor private label brands but tend to limit their purchases to specific categories.

Online shopping, including delivery and click-and-collect services, has become a routine for around half of respondents, with grocery deliveries steadily gaining traction.

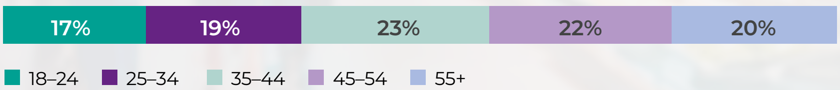
SURVEY DEMOGRAPHICS

We have surveyed 1,082 active Internet users from across Russia, all aged 18 and older.

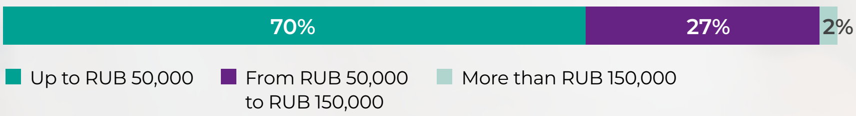
GENDER



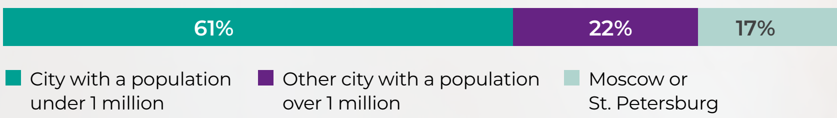
AGE



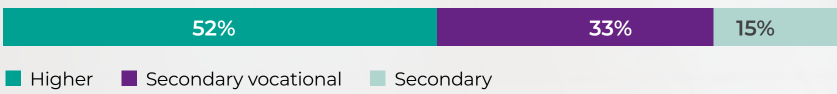
MONTHLY INCOME PER HOUSEHOLD MEMBER



LOCATION



EDUCATION



CONTACTS

ILYA ANANYEV

Partner, Retail & Consumer Products,
Life Sciences & Pharma Leader

Tel.: +7 495 755 9700
ilya.ananyev@b1.ru

ELENA TSATUROVA

Partner, M&A and Restructuring
Leader

Tel.: +7 495 755 9700
elena.y.tsaturova@b1.ru

ABOUT B1 GROUP

B1 Group offers a comprehensive suite of professional services, including assurance, strategy, technology, consulting, transactions, valuation, tax, law and business support.

With over 35 years in Russia and 25 years in Belarus, we have built a strong team of professionals with diverse expertise and a wealth of experience in delivering the most challenging projects. B1 Group operates across 11 cities: Moscow, Minsk, Vladivostok, Ekaterinburg, Kazan, Krasnodar, Novosibirsk, Rostov-on-Don, Samara, St. Petersburg and Togliatti.

Our mission is to help clients uncover innovative solutions, drive growth, transform their business and achieve success—all while boosting their financial resilience and nurturing talent.

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