



**B1**

NEW CHALLENGES  
NEW SOLUTIONS

# RUSSIAN CONSUMERS: QUALITY IS GAINING TRACTION

**35**  
YEARS

# CONTENTS

INTRODUCTION	1
SURVEY FINDINGS	2
KEY HIGHLIGHTS	4
QUALITY AND PRICE ARE STILL THE TOP PRIORITIES WHEN MAKING A PURCHASE	6
BRAND SUBSTITUTION HAS PROVED A VIABLE OPTION: FEWER COMPELLED TO SWITCH FROM FAMILIAR GOODS	8
MOST CONSUMERS REMAIN RELUCTANT TO SPLURGE ON THEIR FAVORITE BRAND ITEMS	10
RUSSIAN GOODS CONTINUE TO REIGN SUPREME	12
WHERE PEOPLE SHOP FOR GROCERIES VS. NON-GROCERIES DIFFERS	14
CONSUMER SENTIMENT IS TAKING A SLIGHT DIP	17
CONSUMERS CONTINUE TO SHIFT AWAY FROM BRANDS, EXPECTING NO CHANGE IN PRODUCT AVAILABILITY	19
DELIVERY SERVICES ON THE RISE, MANUFACTURER PROMOTIONS LEAVE CONSUMERS SATISFIED	21
FOOD AND STAPLES HOLD STRONG: THEIR PRICE AND QUALITY REMAIN PARAMOUNT	23
CONCLUSION	26
RESPONDENTS' PROFILE	27
CONTACTS	28



# INTRODUCTION

Over the past two years, B1 Group has been surveying Russian consumers every six months to gauge their perception of changes occurring in the Russian market.

With three surveys conducted in autumn 2022, spring 2023 and autumn 2023\*, we observed that consumers have generally adapted to shifts since early 2022. To check whether this trend persists in 2024 and uncover emerging patterns, we have conducted our fourth wave of research, polling over a thousand active Russian Internet users in May 2024. Here are the findings from our latest survey.

\* Russian Consumers: Adapting to Change and New Trends (b1.ru)

# SURVEY FINDINGS



QUALITY AND PRICE REMAIN THE KEY PURCHASING CRITERIA, WITH QUALITY GAINING IMPORTANCE AS PRICES CONTINUE TO RISE.

---



WHILE THE MAJORITY OF RESPONDENTS HAVE MANAGED TO FIND SUBSTITUTES FOR PRODUCTS OF THE 'DEPARTED' BRANDS, THE QUALITY OF THESE REPLACEMENTS OFTEN FALLS SHORT COMPARED TO THE ORIGINAL PRODUCTS.

---



MOST OF THE SURVEYED CONSUMERS ARE STILL UNWILLING TO PAY A PREMIUM FOR THEIR ACCUSTOMED BRAND ITEMS. HOWEVER, THOSE WHO DO ARE ENTICED BY THE SUPERIOR QUALITY THESE PRODUCTS OFFER.

---



RUSSIAN-MADE GOODS ARE BECOMING INCREASINGLY POPULAR, PARTLY DUE TO THEIR GROWING VARIETY.

---



E-COMMERCE IS EMERGING AS THE MAIN SALES CHANNEL FOR NON-GROCERY ITEMS, WHILE GROCERIES ARE STILL MOSTLY PURCHASED OFFLINE.



THE SURVEYED CONSUMERS PERCEIVE A SLIGHT DECLINE IN THE QUALITY OF PRIVATE LABEL PRODUCTS OFFERED BY RETAIL CHAINS.

---



WHILE THE MAJORITY OF RESPONDENTS DO NOT ANTICIPATE A SHORTAGE OF CONSUMER GOODS, THEY ARE NOT PLANNING ANY BIG-TICKET PURCHASES IN THE NEXT SIX MONTHS EITHER.

---



OLDER CONSUMERS ARE PREDICTABLY LESS INCLINED TOWARDS EMBRACING ONLINE DELIVERY SERVICES AND SELF-CHECKOUT OPTIONS.

---



FOOD, STAPLES, CLOTHING AND FOOTWEAR STILL MATTER MOST TO CONSUMERS IN TERMS OF BOTH PRICE AND QUALITY. THIS HOLDS TRUE FOR ALL AGE AND GENDER GROUPS.



# KEY HIGHLIGHTS



95%

**AS MANY AS 95% OF RESPONDENTS CITED PRICE AS THE PRIMARY FACTOR INFLUENCING THEIR PURCHASING DECISION,**

with 82% emphasizing quality—a 9 p.p. surge since autumn 2023.

---



25%

**THE PERCENTAGE OF THOSE SEEKING ALTERNATIVES TO THEIR USUAL GOODS AND BRANDS, WHICH BECAME UNAVAILABLE, HAS DROPPED FROM 44% IN AUTUMN 2022 TO 25%.**

Meanwhile, the share of respondents stating that the quality of substitutes was inferior to that of the unavailable goods has increased to 60% from 44% in autumn 2023.

---

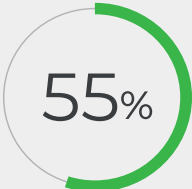


50%

**HALF OF THOSE SURVEYED ARE RELUCTANT TO OVERPAY AND HAVE GIVEN UP THEIR PREFERRED GOODS,**

while 25% would pay a premium of up to 10% to bypass the restrictions and stick with their accustomed brands.

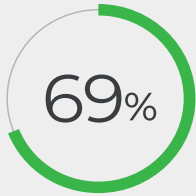
---



55%

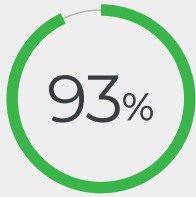
**FIFTY-FIVE PERCENT OF RESPONDENTS PREFER SOURCING GOODS FROM RUSSIA,**

showing a slight uptick from 53% in autumn 2023.



**SIXTY-NINE PERCENT OF RESPONDENTS NOTED AN EXPANSION IN THE VARIETY OF RUSSIAN GOODS.**

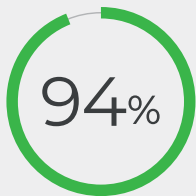
---



**NON-GROCERY ITEMS ARE PURCHASED ON MARKETPLACES BY 93% OF THOSE SURVEYED,**

while 91% buy them through online classifieds, and 82% directly from suppliers' online stores.

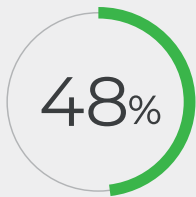
---



**MAJOR RETAIL CHAINS ARE THE GO-TO FOR GROCERY SHOPPING, WITH 94% OF RESPONDENTS MAKING THEIR PURCHASES THERE,**

while 87% turn to local convenience stores, and 63% prefer shopping at markets.

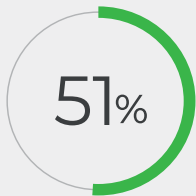
---



**IN THE PAST SIX MONTHS, THERE HAS BEEN A 6 P. P. DROP IN THE NUMBER OF PEOPLE REGULARLY BUYING PRIVATE LABEL PRODUCTS FROM RETAIL CHAINS, NOW AT 48%.**

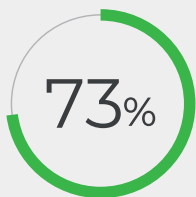
Interestingly, most of those who rarely or never purchase these items still acknowledge their reasonable pricing.

---



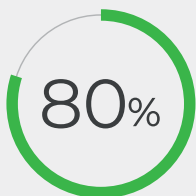
**OVER A HALF ARE STILL CONFIDENT THAT THE SUPPLY OF THEIR USUAL GOODS WILL REMAIN UNCHANGED.**

---



**SEVENTY-THREE PERCENT OF CONSUMERS HAVE NO PLANS FOR BIG-TICKET PURCHASES IN THE NEXT SIX MONTHS, UP 5 P. P. FROM 68% IN AUTUMN 2023.**

---



**FOOD AND STAPLES HAVE CLIMBED UP THE CONSUMER PRIORITY LIST SINCE LAST AUTUMN, WITH BOTH QUALITY (FROM 75% TO 80%) AND PRICE (FROM 75% TO 79%) GAINING SIGNIFICANCE IN SPRING 2024.**

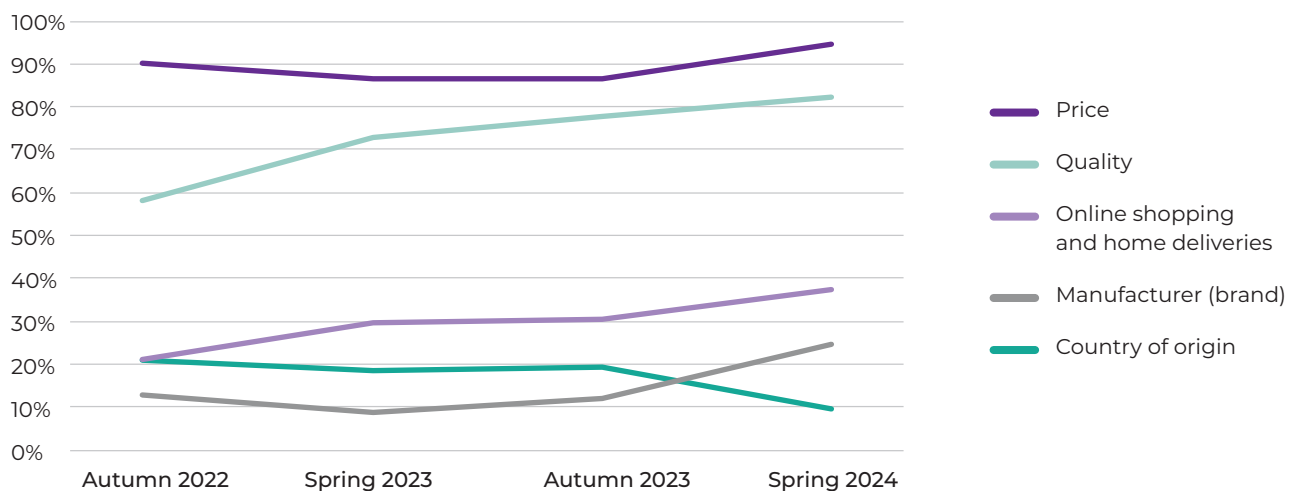
As for clothing and footwear, these metrics have seen little change but continue to rank second in importance for all surveyed consumers regardless of age or gender.

# QUALITY AND PRICE ARE STILL THE TOP PRIORITIES WHEN MAKING A PURCHASE

WHEN SELECTING A PRODUCT, THE CONSUMERS WE HAVE SURVEYED STILL FOCUS MAINLY ON PRICE AND QUALITY. AMONG OUR RESPONDENTS, 95% CITED PRICE AS THE PRIMARY FACTOR INFLUENCING THEIR PURCHASING DECISION. FOLLOWING CLOSELY BEHIND, 82% EMPHASIZED QUALITY. THIS SUGGESTS THAT CONSUMERS ARE LOOKING FOR THE BEST QUALITY AT AN AFFORDABLE PRICE. ONLY 25% CONSIDER THE BRAND TO BE THE KEY DRIVER OF THEIR PURCHASING DECISION, WHILE 9% PRIORITIZE THE COUNTRY OF ORIGIN.

## WHAT ARE THE KEY DRIVERS OF YOUR PURCHASING DECISION?

*(Select all that apply.)*





Meanwhile, we have noticed a decline in the importance of a product's country of origin over the past 18 months, dropping from 21% in autumn 2022 to 9% in spring 2024. Conversely, there has been a slight uptick in brand loyalty, rising from 13% in autumn 2022 to 25% in spring 2024. By the looks of it, the situation regarding the ability to purchase unavailable items has stabilized (we will delve deeper into this later), prompting the consumers we have surveyed to place a greater emphasis on brands.

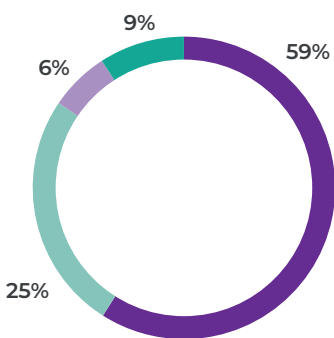
Quality and the ease of online shopping with home delivery are steadily becoming more influential factors for respondents when it comes to choosing products. For example, while 58% cited product quality as their top priority in autumn 2022, this percentage had risen to 82% by spring 2024. Similarly, the importance of online shopping has surged from 21% to 37%, which may be attributed to the growing habit of ordering specific items online.



# BRAND SUBSTITUTION HAS PROVED A VIABLE OPTION: FEWER COMPELLED TO SWITCH FROM FAMILIAR GOODS

AS IN PREVIOUS SURVEYS, WE ASKED CONSUMERS TO RATE THE AVAILABILITY OF THEIR ACCUSTOMED PRODUCTS AND BRANDS. AMONG OUR RESPONDENTS, 59% REPORTED NO CHANGE IN AVAILABILITY, WHILE THE NUMBER OF THOSE WHO FOUND THEIR PREFERRED ITEMS AND BRANDS UNAVAILABLE, LEADING THEM TO SEEK ALTERNATIVES, HAS DECREASED FROM 44% TO 25% SINCE AUTUMN 2022.

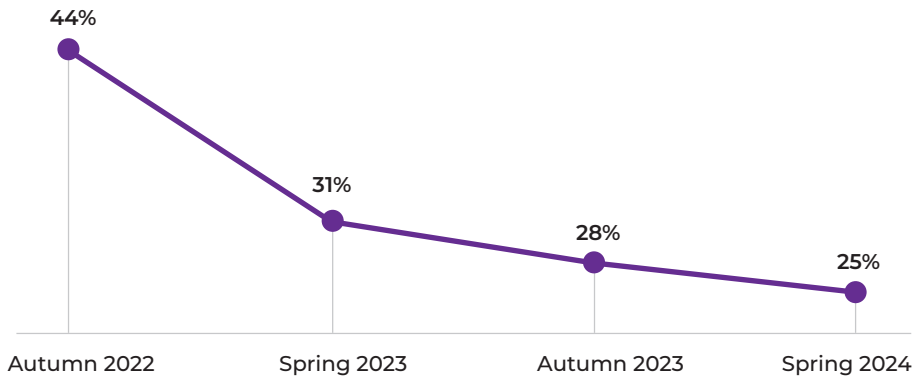
## WHAT HAS CHANGED IN TERMS OF THE AVAILABILITY OF YOUR PREFERRED GOODS AND BRANDS OVER THE PAST SIX MONTHS?



- Nothing has changed
- My preferred goods and brands have become unavailable, so I had to switch to other goods and brands
- I stopped buying my preferred brands after they became unavailable and don't look for alternatives among the available ones
- My preferred goods and brands have become unavailable through the usual channels, so I had to look for ways around the restrictions

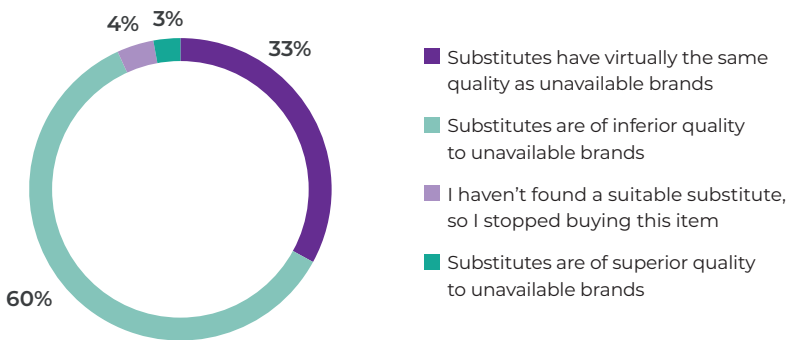
**MY PREFERRED GOODS AND BRANDS HAVE BECOME UNAVAILABLE, SO I HAD TO SWITCH TO OTHER GOODS AND BRANDS**

When assessing the quality of the substitutes, respondents who opted for products from other manufacturers were generally dissatisfied: 60% of those surveyed believed that the replacement fell short in terms of quality.

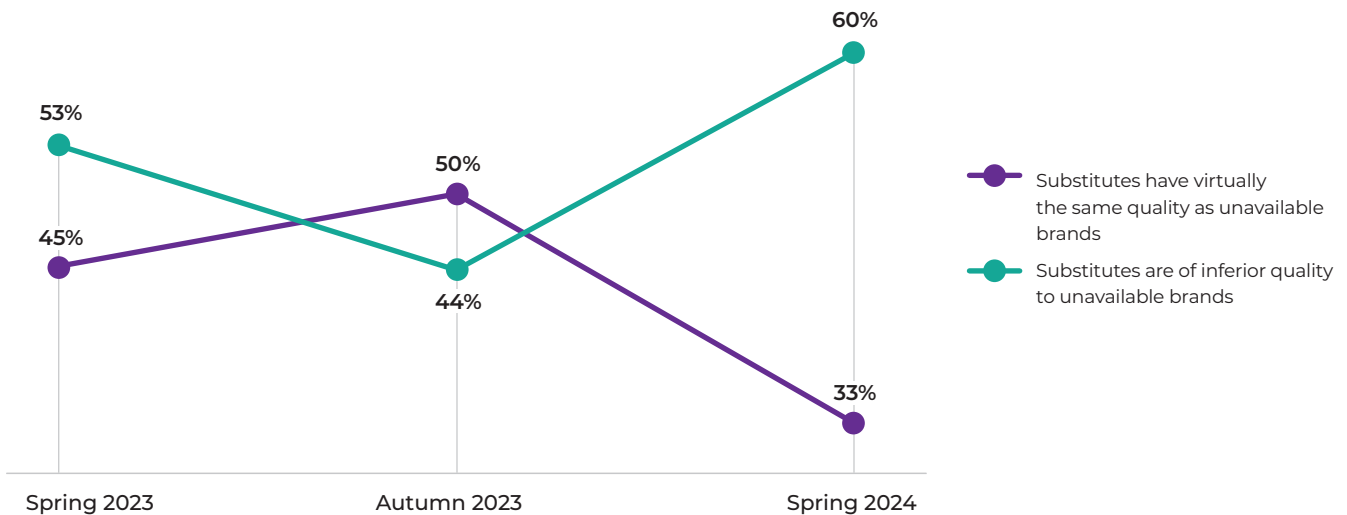


**HOW WOULD YOU RATE THE QUALITY AND CONSUMER PROPERTIES OF THE PRODUCTS AND SERVICES YOU HAVE CHOSEN AS SUBSTITUTES FOR UNAVAILABLE BRANDS, ASSUMING THEY MEET YOUR NEEDS?**

Over the past six months since our previous research wave, dissatisfaction with the quality of substitutes for products of the 'departed' brands has risen from 44% to 60%, while the proportion of respondents indicating that the replacement quality is roughly the same has dropped from 50% to 33%.



**HOW WOULD YOU RATE THE QUALITY AND CONSUMER PROPERTIES OF THE PRODUCTS AND SERVICES YOU HAVE CHOSEN AS SUBSTITUTES FOR UNAVAILABLE BRANDS, ASSUMING THEY MEET YOUR NEEDS?**

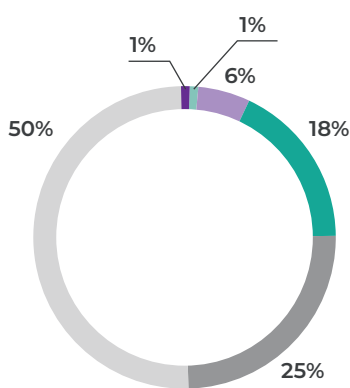




# MOST CONSUMERS REMAIN RELUCTANT TO SPLURGE ON THEIR FAVORITE BRAND ITEMS

THE VAST MAJORITY OF RESPONDENTS IN OUR SURVEY CONTINUE TO RESIST PAYING EXTRA TO STAY LOYAL TO THEIR PREFERRED BRANDS: 50% HAVE OPTED OUT OF MORE EXPENSIVE ITEMS.

ARE YOU NOW SPENDING MORE IN ORDER TO BYPASS THE RESTRICTIONS AND STICK WITH YOUR USUAL BRANDS?\*

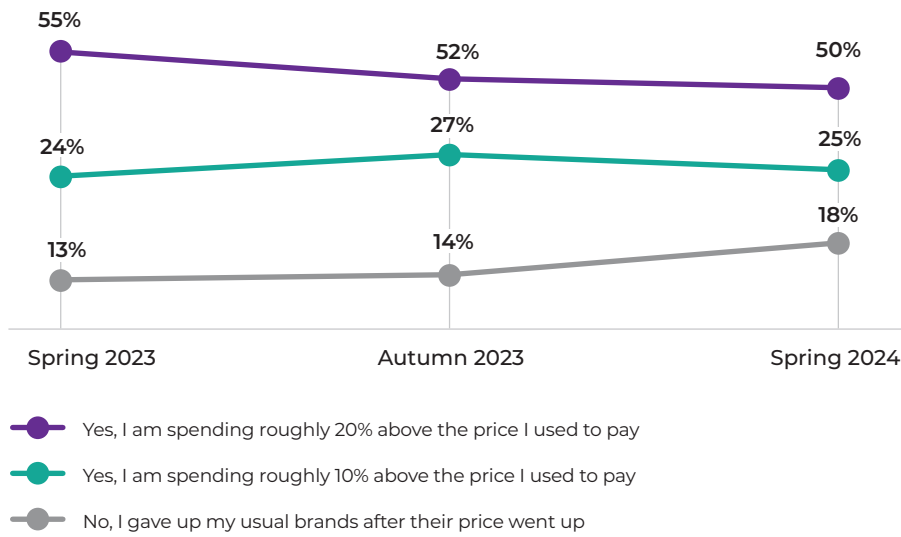


- Yes, I am spending over 100% above the price I used to pay
- Yes, I am spending roughly 100% above the price I used to pay
- Yes, I am spending roughly 50% above the price I used to pay
- Yes, I am spending roughly 20% above the price I used to pay
- Yes, I am spending roughly 10% above the price I used to pay
- No, I gave up my usual brands after their price went up

However, this reluctance has been steadily declining since spring 2023, when it was at 55%. Meanwhile, the number of those willing to spend up to 20% on top of the current price has increased from 13% to 18%.

\* Percentages do not add up to 100% due to rounding.

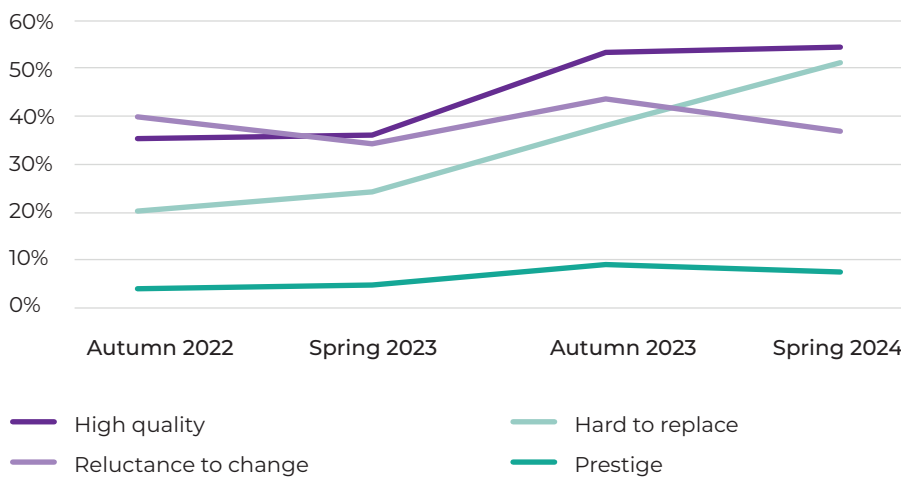
### ARE YOU NOW SPENDING MORE IN ORDER TO BYPASS THE RESTRICTIONS AND STICK WITH YOUR USUAL BRANDS?



The two main reasons why most survey participants would be willing to pay a premium for certain brand items remain the high quality level (54%) and the challenge of finding substitutes (51%).

### WHAT WOULD MAKE YOU PAY A PREMIUM FOR PARTICULAR BRANDS?

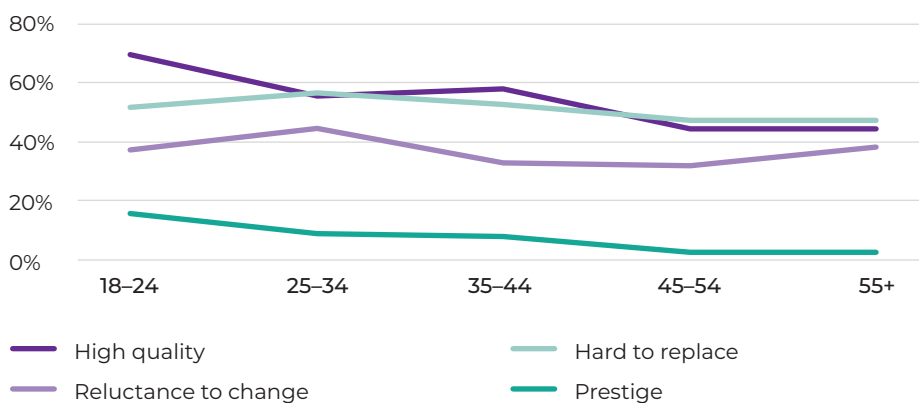
(Select all that apply.)



Interestingly, the younger the respondents, the greater their emphasis on quality. Among those under 24 years of age, 69% are willing to pay extra for high-quality products. Moreover, brand prestige matters more in this demographic: while 8% of all respondents prioritize it, among those under 24, it is 16%. The proportion of those willing to pay for superior quality has risen from 36% in autumn 2022 to 54% in spring 2024.

### WHAT WOULD MAKE YOU PAY A PREMIUM FOR PARTICULAR BRANDS?

(Select all that apply.)



# RUSSIAN GOODS CONTINUE TO REIGN SUPREME



**SIMILAR TO OUR PREVIOUS SURVEYS IN 2022 AND 2023, MOST RESPONDENTS CONTINUE TO FAVOR PRODUCTS MADE IN RUSSIA: IN SPRING 2024, 55% MENTIONED RUSSIA AS THEIR TOP CHOICE FOR GOODS.**

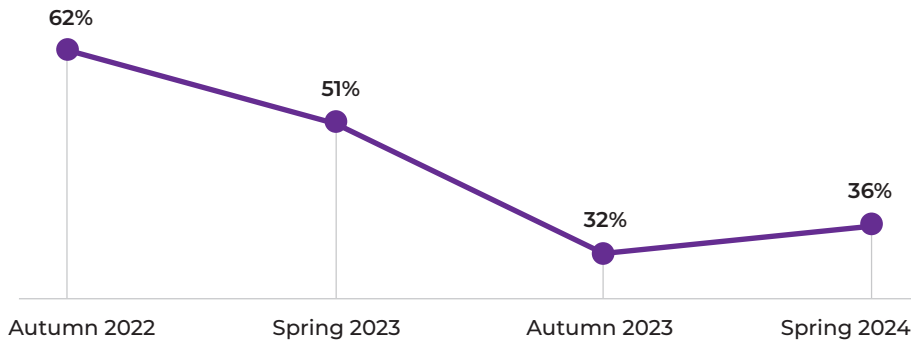
## WHAT ARE YOUR TOP TWO PREFERRED SOURCES OF ORIGIN FOR GOODS YOU PURCHASE?



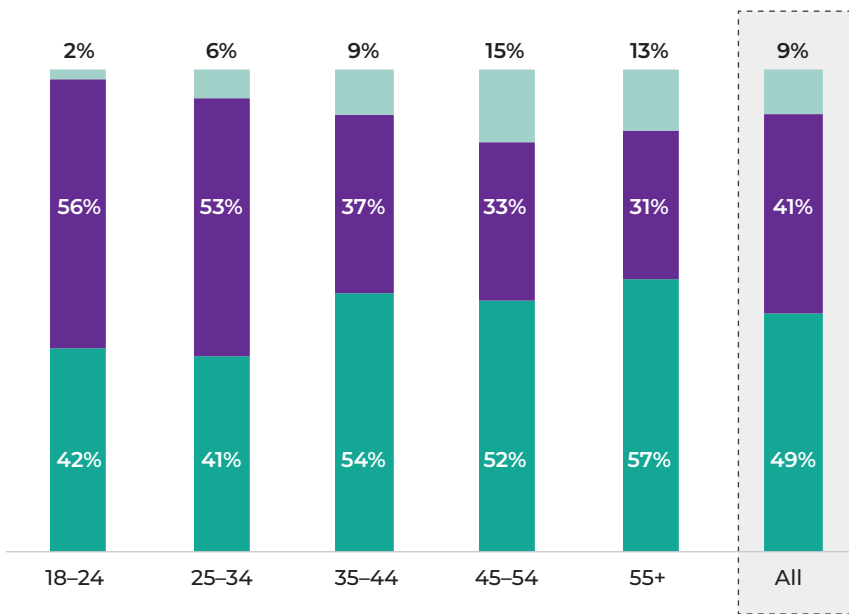
However, the appeal of well-known brands has declined over the past 18 months, dropping from 62% to 36%, partly due to scarcity of these items in the market.

Nearly half of our survey respondents have reported an uptick in purchases of Russian-made goods lately, while 42% have noted that the country of origin holds no significance to them.

### IMPORTED GOODS OF WELL-KNOWN BRANDS



### ARE YOU NOW BUYING MORE GOODS MADE IN RUSSIA?

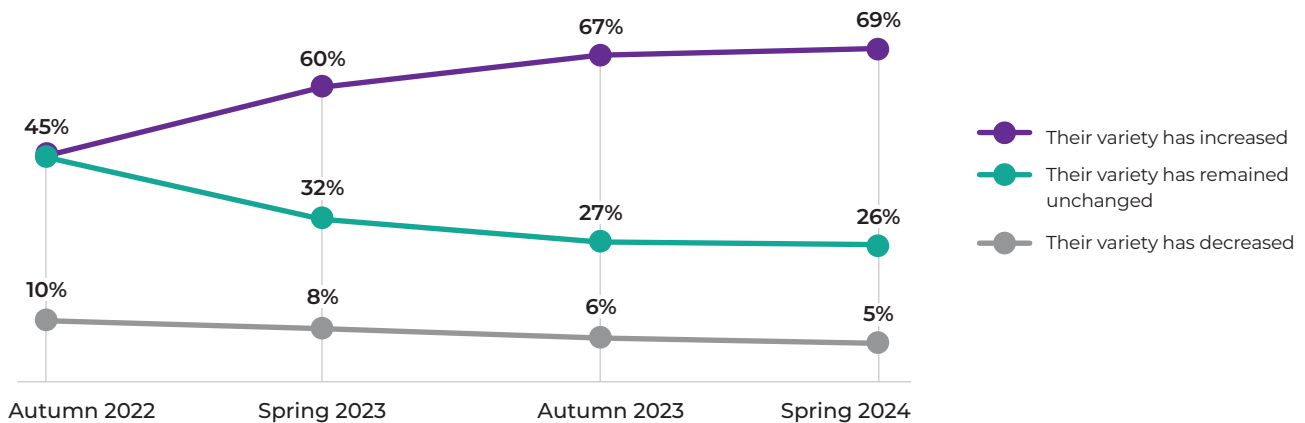


In younger demographics, there is less concern about a product's country of origin, whereas among older age groups, a higher proportion have recently or always preferred Russian goods.

Among those surveyed, 69% reported the expanded variety of Russian-made products, with this upward trend gaining momentum – from 45% in autumn 2022 to 69% in spring 2024.

- Yes, I have recently been buying many more goods made in Russia
- I don't care about the country of origin
- I consistently buy goods made in Russia.

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



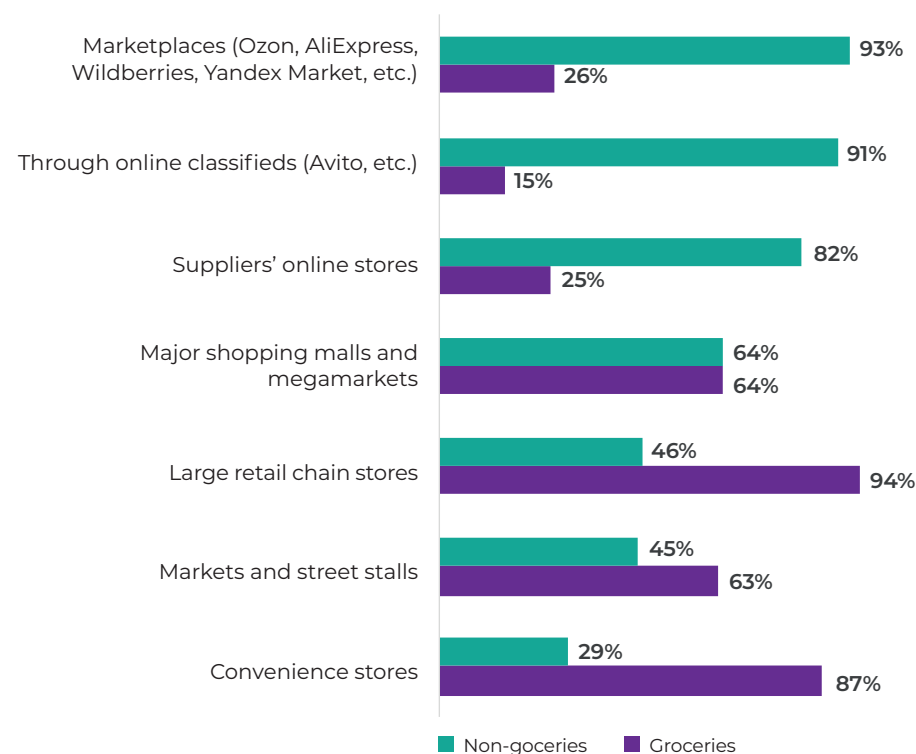


# WHERE PEOPLE SHOP FOR GROCERIES VS. NON-GROCERIES DIFFERS

**IN OUR PAST CONSUMER SURVEYS, WE HAVE SEEN A CLEAR TREND: ONLINE SHOPPING IS TAKING OVER. BY AUTUMN 2023, 74% OF RESPONDENTS WERE REGULAR ONLINE SHOPPERS.**

## WHERE AND HOW DO YOU MOST FREQUENTLY SHOP THESE DAYS?

*(Select all that apply.)*



When surveying Russian consumers in spring 2024, we decided to dive deeper into the purchasing patterns for grocery and non-grocery items.

Based on our findings, most of the consumers we have surveyed prefer different shopping formats for groceries and non-groceries. Non-grocery items are purchased on marketplaces by 93% of those surveyed, while 91% buy them through online classifieds, and 82% directly from suppliers' online stores. For groceries, the proportion of online purchases is smaller. Major retail chains are the go-to for grocery shopping, with 94% of respondents making their purchases there, while 87% turn to local convenience stores and only 26% buy on marketplaces.

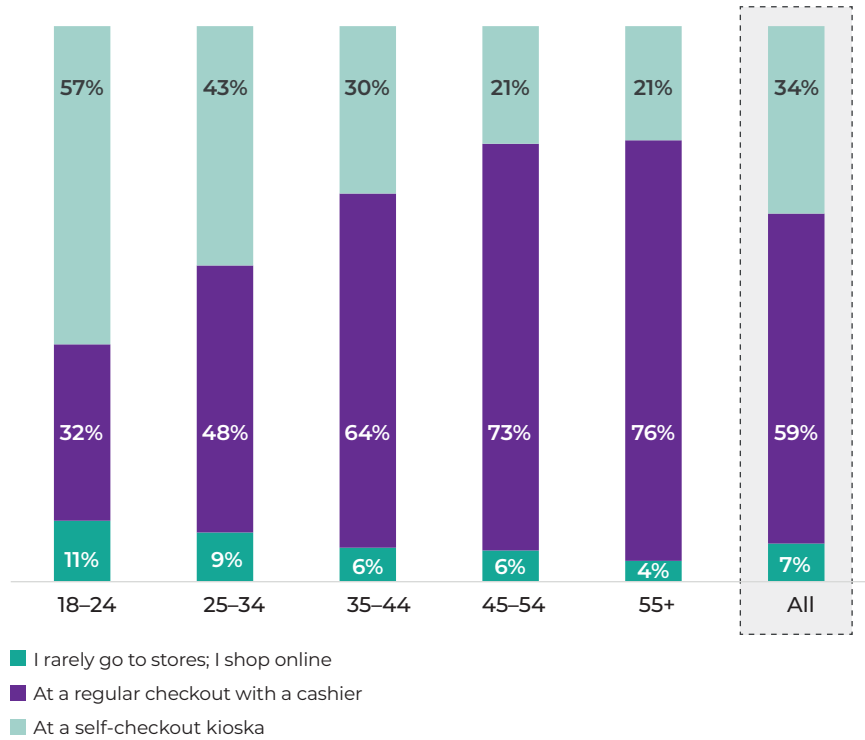
Most of our survey participants shop at large retail chains. While self-checkout kiosks have become more common, 59% of respondents still prefer using traditional cashier checkouts.

**HOW DO YOU PREFER TO CHECK OUT WHEN SHOPPING IN-STORE?**



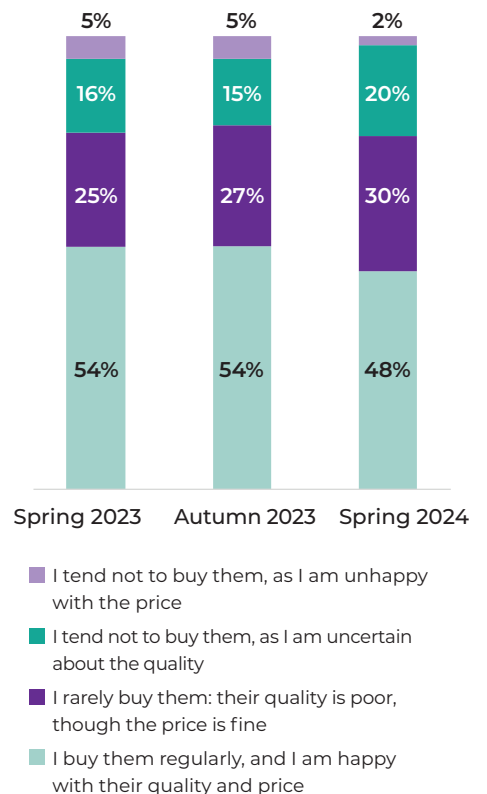
The highest proportion of these shoppers (76%) are in the 55+ age group. By contrast, younger people under 24 prefer self-checkout, with 57% in this age group choosing this option.

**HOW DO YOU PREFER TO CHECK OUT WHEN SHOPPING IN-STORE?**  
(Different age groups)



Interest in private label products has seen a slight decline among survey participants compared with six months ago. In both spring and autumn 2023, 54% of respondents regularly purchased these items. However, by spring 2024, this percentage had dropped to 48%. Meanwhile, there has been a gradual increase in the number of respondents perceiving the quality of such goods as subpar, leading to less frequent purchases. In spring 2023, this group constituted 25% of respondents, but by spring 2024, it had risen to 30%. This indicates that amid the prevailing trend favoring quality products at reasonable prices, respondents are becoming increasingly dissatisfied with the quality of private label offerings.

**WHAT IS YOUR OPINION OF PRIVATE LABEL PRODUCTS IN TERMS OF PRICE AND QUALITY?**

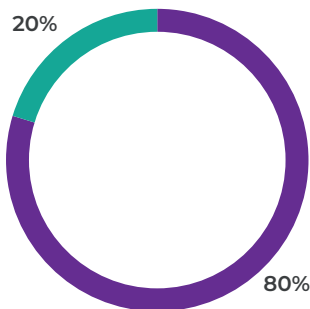




Recently, there has been a surge of products with Cyrillic brand names, once made in Russia by foreign companies.

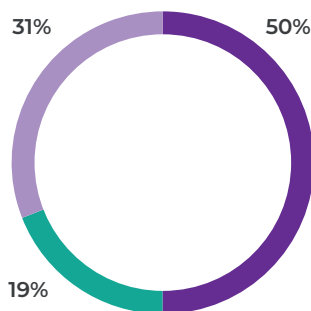
While the overwhelming majority of our respondents (80%) are not cutting back on buying these items, 50% expect prices to climb and nearly as many (51%) do not foresee any changes in quality. Our take is that consumers are bracing for any shift to hit their wallets, with only a minority (17%) hopeful for improved product quality.

**HOW DOES THE CYRILLIC BRANDING OR RENAMING OF A BRAND FORMERLY OWNED BY A FOREIGN COMPANY AFFECT YOUR PURCHASING DECISION?**



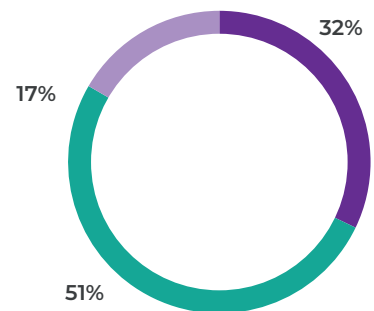
- I will keep buying it
- I will buy it less

**HOW DOES THE CYRILLIC BRANDING OR RENAMING OF A BRAND FORMERLY OWNED BY A FOREIGN COMPANY AFFECT YOUR PRICE EXPECTATIONS?**



- I expect the price to increase
- I expect the price to decrease
- I don't expect any significant changes in price

**HOW DOES THE CYRILLIC BRANDING OR RENAMING OF A BRAND FORMERLY OWNED BY A FOREIGN COMPANY AFFECT YOUR EXPECTATIONS REGARDING ITS QUALITY?**

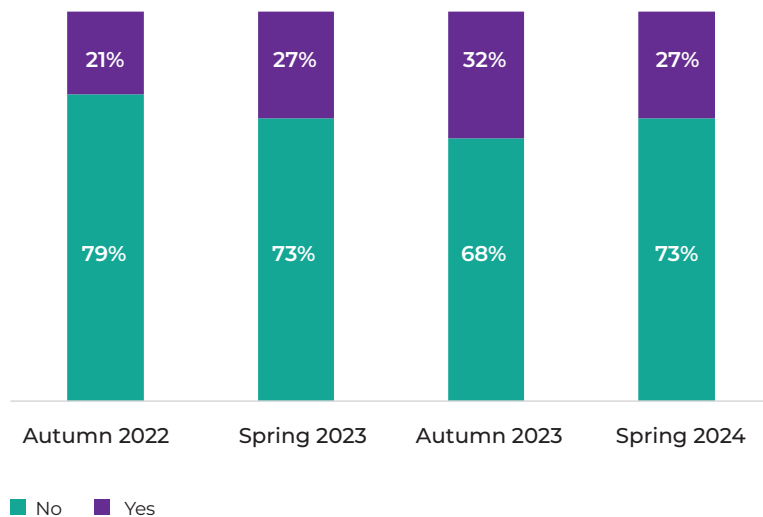


- I anticipate a decrease in quality
- I don't expect any change in quality
- I anticipate an improvement in quality

# CONSUMER SENTIMENT IS TAKING A SLIGHT DIP

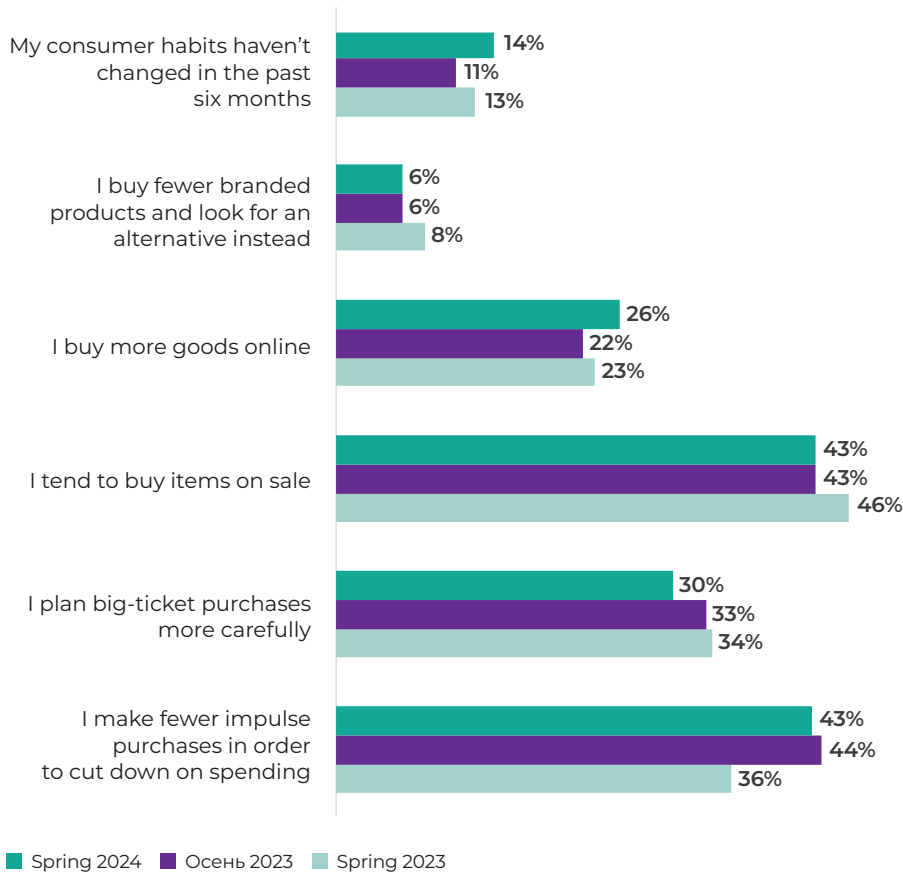
THE APPETITE FOR BIG-TICKET PURCHASES REMAINS MODEST AMONG RESPONDENTS, HOVERING BELOW A THIRD. IT HAS DECREASED SLIGHTLY OVER THE PAST SIX MONTHS, FROM 32% IN AUTUMN 2023 TO 27% IN SPRING 2024. WE WILL KEEP AN EYE ON THIS TREND TO SEE IF IT PERSISTS.

ARE YOU PLANNING BIG-TICKET PURCHASES IN THE NEXT SIX MONTHS (I.E., EQUAL OR EXCEEDING SIX MONTHS' WORTH OF YOUR HOUSEHOLD INCOME)?



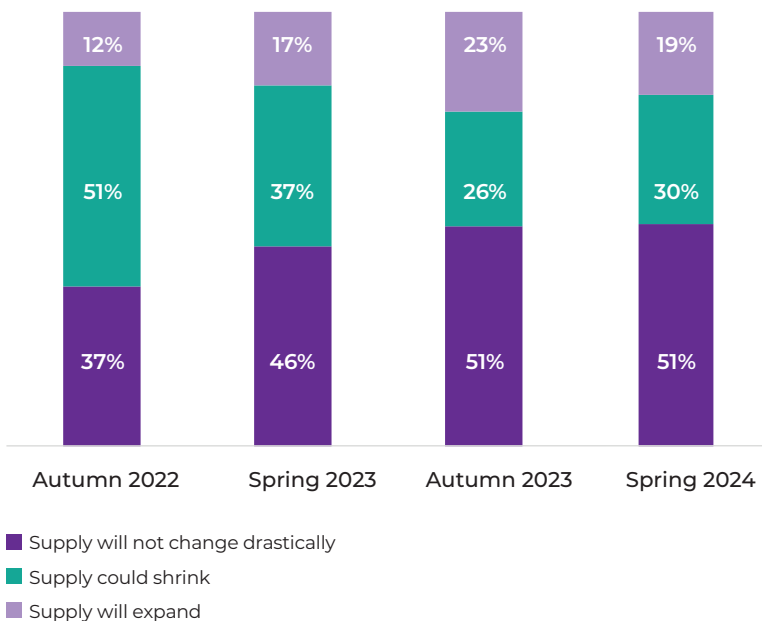
## HOW HAVE YOUR CONSUMER HABITS CHANGED OVER THE PAST SIX MONTHS?

(Select no more than two responses.)



The consumer habits of our respondents have seen only minor changes from previous survey waves. There has been a decrease in impulse buying among 43% of respondents, who are now opting to cut down on spending and seeking out items on sale.

## HOW WILL THE SUPPLY OF YOUR USUAL GOODS AND SERVICES CHANGE IN THE NEAR TERM (I.E., OVER THE NEXT 12 MONTHS)?



However, when it comes to expectations regarding future offerings, optimism prevails. Among those surveyed, 70% expect that the supply of their usual goods and services will remain robust in the coming year, albeit this figure has seen a slight dip – by 4 p. p. since autumn 2023.

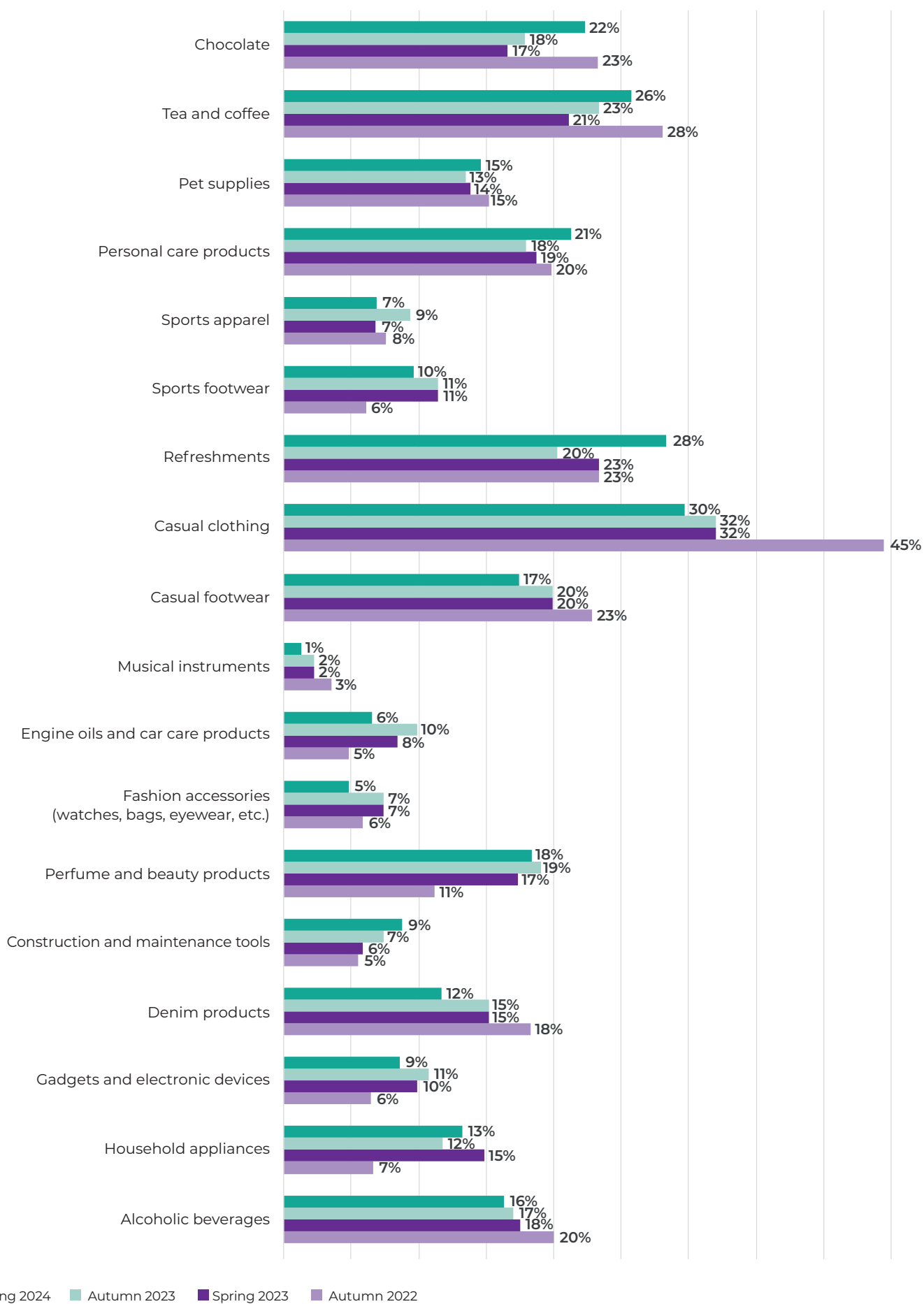
# CONSUMERS CONTINUE TO SHIFT AWAY FROM BRANDS, EXPECTING NO CHANGE IN PRODUCT AVAILABILITY

**AS IN PREVIOUS SURVEY WAVES, WE HAVE ASKED RESPONDENTS TO IDENTIFY CATEGORIES WHERE THEY SWITCHED FROM A WELL-KNOWN BRAND TO A RUSSIAN ONE OR TO PRODUCTS FROM AN UNKNOWN MANUFACTURER. JUST LIKE SIX MONTHS AGO, THE TOP THREE WERE CASUAL CLOTHING (30%), REFRESHMENTS (28%), AND TEA AND COFFEE (26%).**

However, we are seeing mixed trends across categories compared with the last wave: in some, the share of people ditching big brands has grown (especially in refreshments (8 p. p.), chocolate (4 p. p.) and personal care products (3 p. p.)), while in others, it has decreased (by 4 p. p. in denim products and by 3 p. p. in fashion accessories, engine oils and car care products, and sports apparel). Nevertheless, in both cases, the percentage changes from the total number of respondents are not dramatic, indicating overall stabilization in the consumer market.



**PLEASE SELECT THE TOP THREE CATEGORIES WHERE YOU HAVE SWITCHED FROM A WELL-KNOWN BRAND TO A RUSSIAN ONE OR TO PRODUCTS FROM AN UNKNOWN MANUFACTURER**





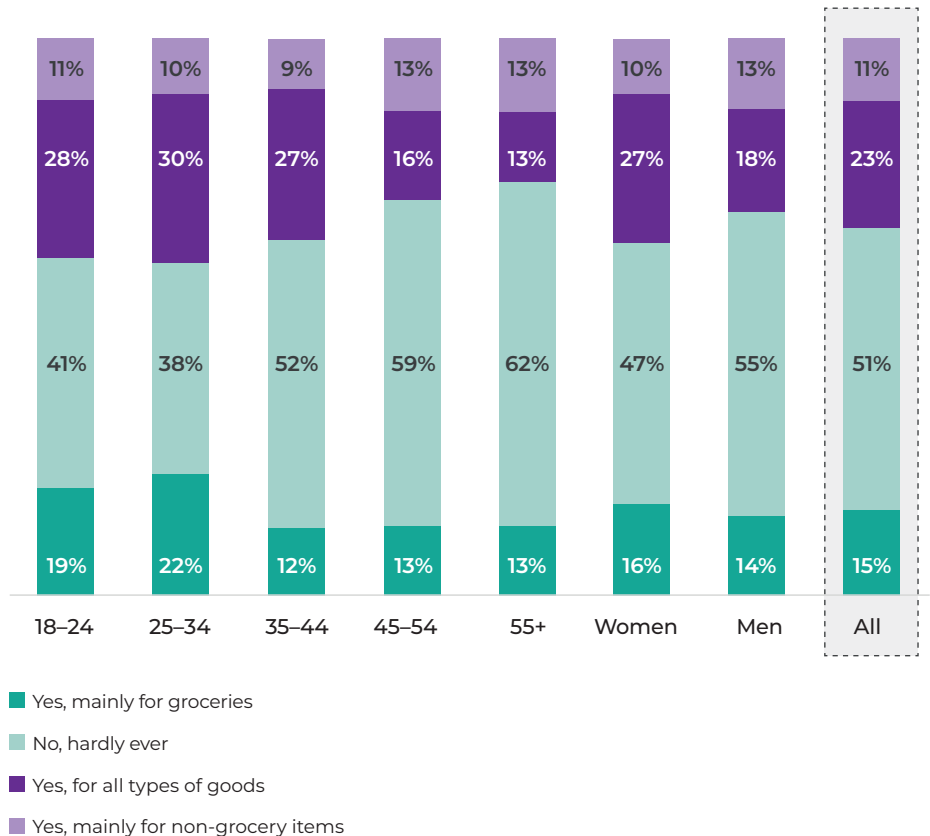
# DELIVERY SERVICES ON THE RISE, MANUFACTURER PROMOTIONS LEAVE CONSUMERS SATISFIED

OVER THE PAST FEW YEARS, ONLINE ORDERING AND GROCERY DELIVERY SERVICES, ALONG WITH DARK STORE NETWORKS, HAVE BEEN RAPIDLY EXPANDING, RECEIVING A MAJOR PUSH DURING THE COVID-19 PANDEMIC.

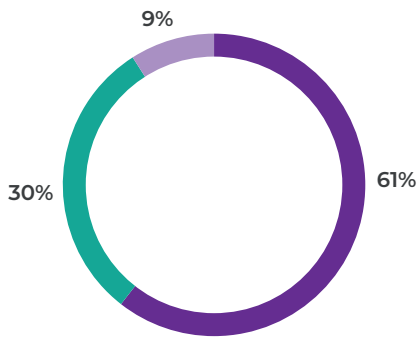
Consumers are increasingly tapping into these services (49%), with 11% favoring non-food items, 15% preferring groceries and 23% exploring all product types.

The older generation has been slower to adopt, with 62% of respondents aged over 55 yet to embrace these conveniences.

## DO YOU USE ORDERING AND DELIVERY SERVICES FOR PURCHASING GROCERIES AND NON-GROCERY ITEMS (SAMOKAT, YANDEX EATS, SBERMARKET, ETC.)?



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



- I always try to buy items on promotion; I'm satisfied with the price and quality
- I don't pay attention to the terms; I just buy my usual items
- I get frustrated when the price changes abruptly after the promotion ends

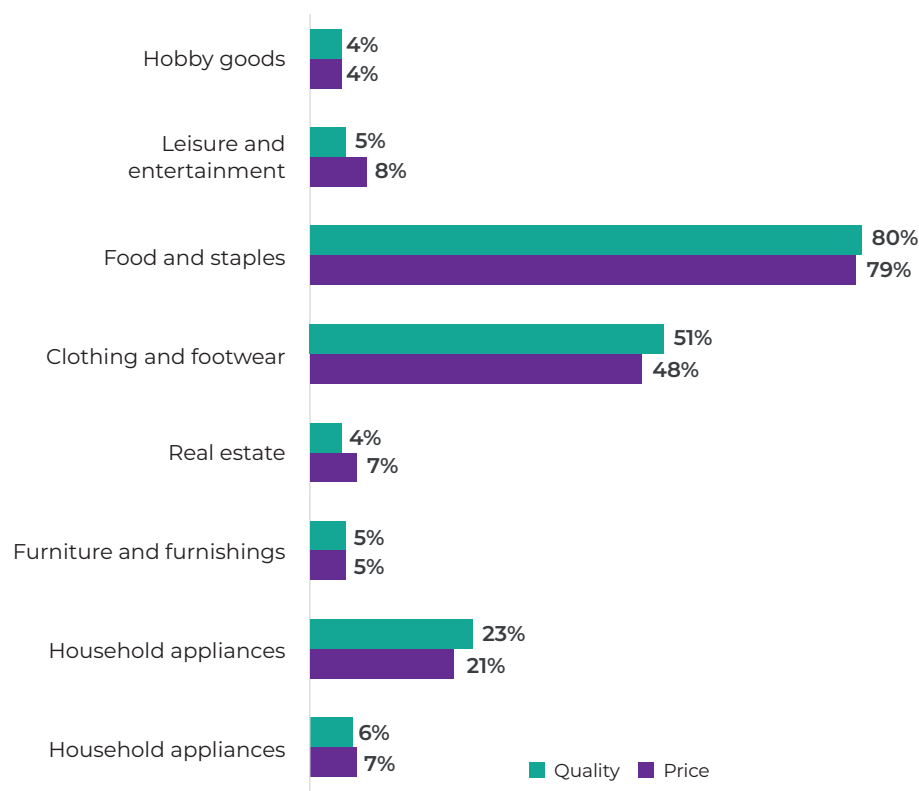
According to our survey, retail promotional campaigns generally please consumers: 61% always shop the deals, satisfied with both quality and price. However, 9% are frustrated over sudden price hikes after the promotion ends.



# FOOD AND STAPLES HOLD STRONG: THEIR PRICE AND QUALITY REMAIN PARAMOUNT

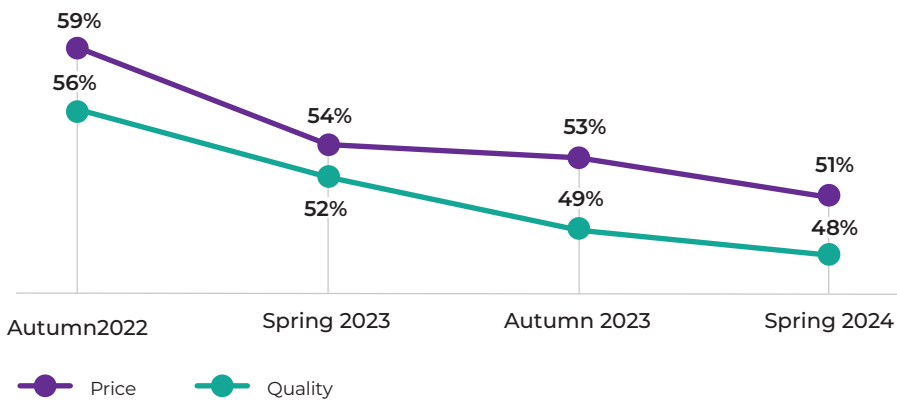
WHEN ASKED ABOUT THE IMPORTANCE OF PRICE AND QUALITY FOR CERTAIN PRODUCT CATEGORIES, RESPONDENTS SURVEYED IN SPRING 2024, MUCH LIKE BEFORE, PRIORITIZED FOOD AND STAPLES (79% – PRICE AND 80% – QUALITY), FOLLOWED BY CLOTHING AND FOOTWEAR (48% AND 51%), AS WELL AS HOUSEHOLD APPLIANCES (21% AND 23%).

WHAT PRODUCTS WILL MATTER MOST TO YOU IN THE NEXT 12 MONTHS IN TERMS OF PRICE AND QUALITY?



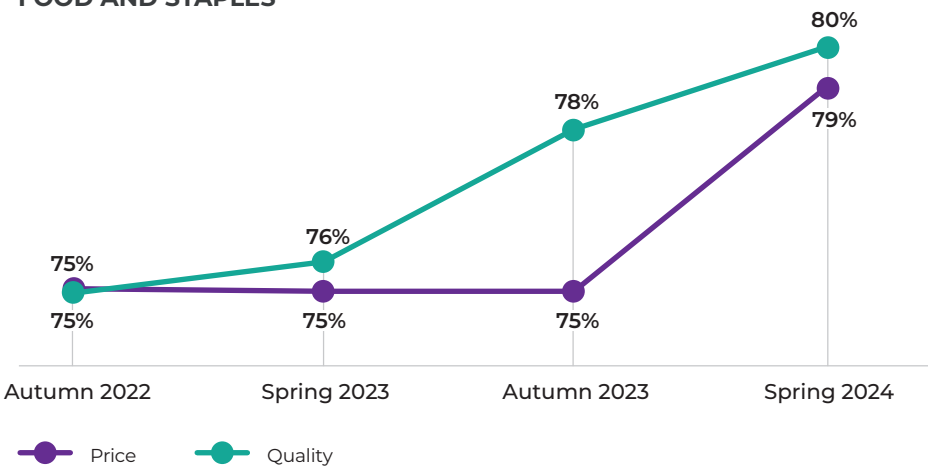


**CLOTHING AND FOOTWEAR**



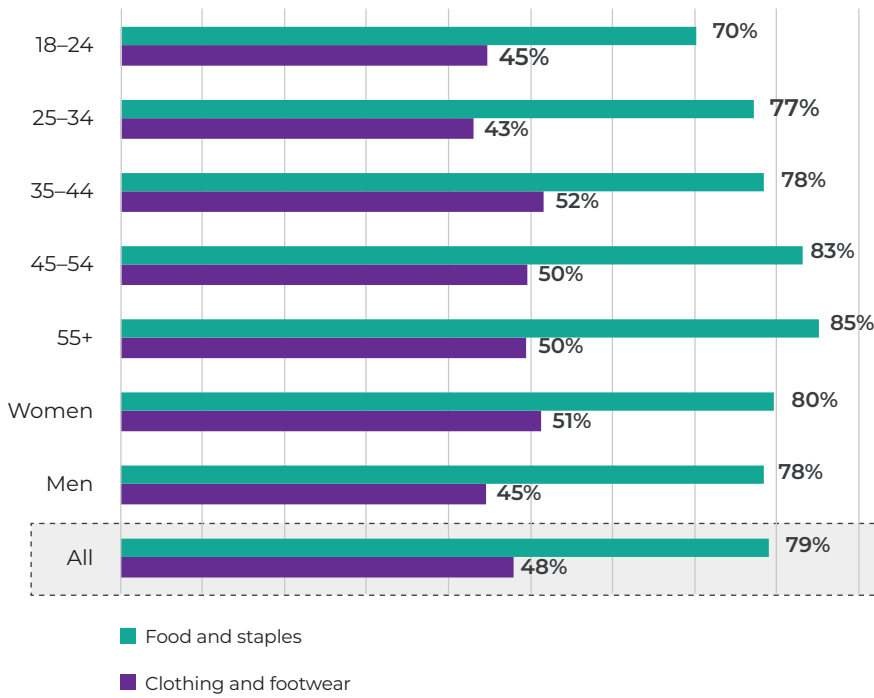
Since autumn 2022, there has been a noticeable shift in priorities: the importance of clothing and footwear has decreased, dropping from 59% to 51% in terms of price and from 56% to 48% in terms of quality.

**FOOD AND STAPLES**



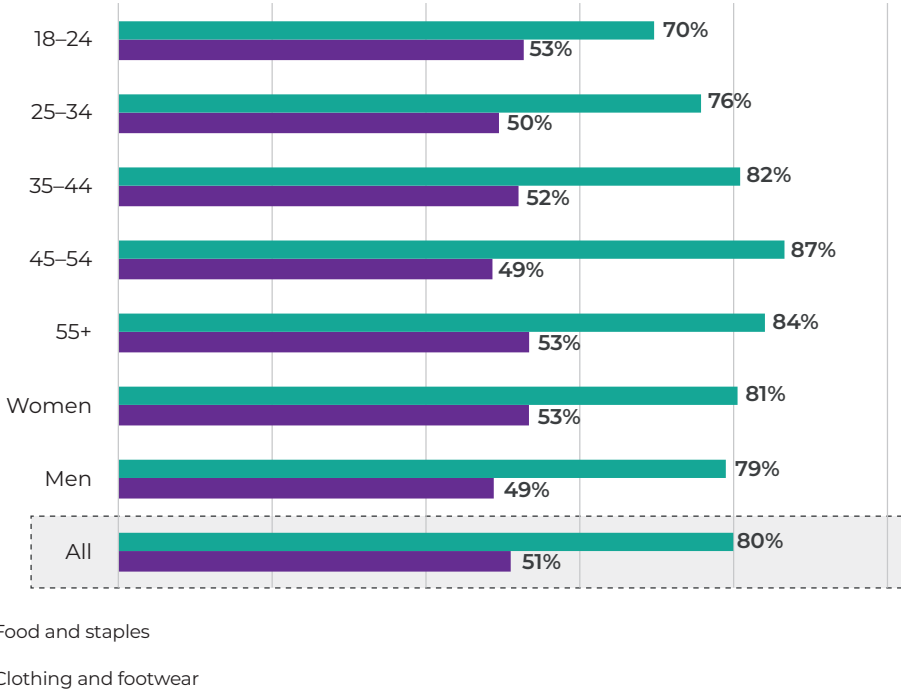
On the flip side, the significance of food and staples has risen, climbing from 75% to 80% in terms of price and from 75% to 79% in terms of quality.

**PRICE SIGNIFICANCE: FOOD AND STAPLES VS. CLOTHING AND FOOTWEAR**



Furthermore, both price and quality remain important factors in these categories for men and women of all age groups. Whether it is food and staples or clothing and footwear, the choice frequency remains virtually unchanged, irrespective of the respondent's profile.

**QUALITY SIGNIFICANCE: FOOD AND STAPLES VS. CLOTHING AND FOOTWEAR**





# CONCLUSION

**SINCE AUTUMN 2023, CONSUMER BEHAVIOR HAS NOT CHANGED MARKEDLY. PRICE AND QUALITY STILL TOP THE LIST WHEN PICKING FAST-MOVING CONSUMER GOODS, WITH RESPONDENTS WILLING TO BUY RUSSIAN PRODUCTS AND GENERALLY RELUCTANT TO OVERPAY FOR THOSE OF THE 'DEPARTED' BRANDS. WHILE MOST DO NOT REPORT ISSUES WITH ACCESSING THEIR USUAL ITEMS, NEARLY TWO-THIRDS OF SURVEY PARTICIPANTS REMAIN DISSATISFIED WITH THE QUALITY OF SUBSTITUTES.**

Online shopping has become common for most respondents. However, their shopping habits vary: they prefer to buy non-food items online, but stick to physical stores for groceries.

Rebranding is not expected to significantly affect demand. The vast majority of our survey participants will keep buying their usual products even if the names are localized into Russian.

Consumer optimism has dipped slightly over the past six months. We will be closely monitoring to see if this recent decline in our fourth wave of research signifies a broader trend.



# RESPONDENTS' PROFILE

We have surveyed 1,095 active Internet users in Russia, all of whom were over 18 years old.

## RESPONDENTS BY GENDER



■ Men ■ Women

## RESPONDENTS BY AGE\*



■ 55+ ■ 45-54 ■ 35-44 ■ 25-34 ■ 18-24

\* Percentages do not add up to 100% due to rounding.

# CONTACTS



## **ILYA ANANYEV**

Partner, Retail & Consumer Products, Agribusiness and Life Sciences Leader

Tel.: +7 495 755 9700

[ilya.ananyev@b1.ru](mailto:ilya.ananyev@b1.ru)



## **ELENA TSATUROVA**

Partner, M&A and Restructuring Leader, Consulting, Technology and Transactions

Tel.: +7 495 755 9700

[elena.y.tsaturova@b1.ru](mailto:elena.y.tsaturova@b1.ru)



## **ALEXEI MALENKIN**

Partner, Retail & Consumer Products, Agribusiness and Life Sciences Tax Leader

Tel.: +7 495 755 9700

[alexei.malenkin@b1.ru](mailto:alexei.malenkin@b1.ru)



## **TATIANA BOTNER**

Business Development Director, Retail & Consumer Products, Agribusiness and Life Sciences

Tel.: +7 495 755 9700

[tatiana.botner@b1.ru](mailto:tatiana.botner@b1.ru)





## **ABOUT B1 GROUP**

B1 Group offers a full range of professional services, covering assurance, strategy, technology, consulting, transactions, valuation, tax, law and business support.

In our 35 years in Russia and more than two decades in Belarus, we have assembled a strong team of professionals with broad expertise and a wealth of experience in delivering challenging projects. B1 Group is based in ten cities: Moscow, Minsk, Ekaterinburg, Kazan, Krasnodar, Novosibirsk, Rostov-on-Don, St. Petersburg, Togliatti and Vladivostok.

We help clients find new solutions, grow, transform and operate their business as well as strengthen their financial and human capital.

© 2024 B1 – Consult LLC.  
All rights reserved.

This publication contains information in summary form and is therefore intended for general guidance only. It is not intended to be a substitute for detailed research or the exercise of professional judgment. B1 Group is not responsible for loss occasioned to any person acting or refraining from action as a result of any material in this publication. On any specific matter, reference should be made to the appropriate advisor.

**B1.RU | B1.BY**

