

The State of the Online Book Market in Russia



with support of



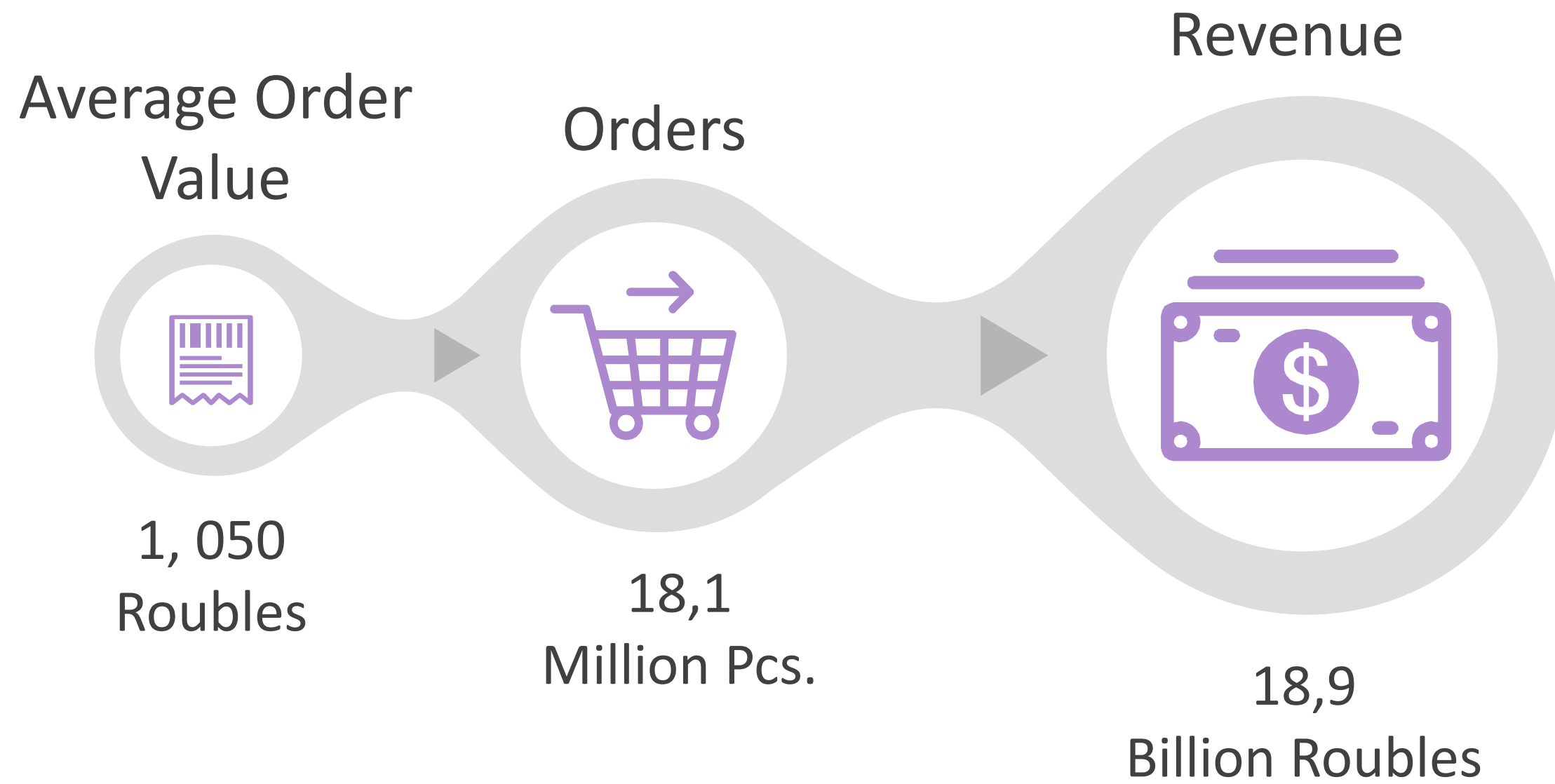
Research Methodology

1. The study examines the online market of books (excluding eBooks and audiobooks). It does not assess book sales by department stores (a store that sells products from various categories, each of which occupy less than 75% of the store's total sales). We have, however, included a slide presenting book sales from the largest Russian department store – Ozon.ru. This research also excludes book sales from foreign online stores and marketplaces.
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. Statistics on the number of orders and sales volume is based on data from the 1000 largest Russian online stores in 2018 (by the number of orders). To calculate the number of orders, we regularly monitored the number of online orders and coupled it with data provided by stores themselves or found in the public domain.
4. 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

Online Book Market Size

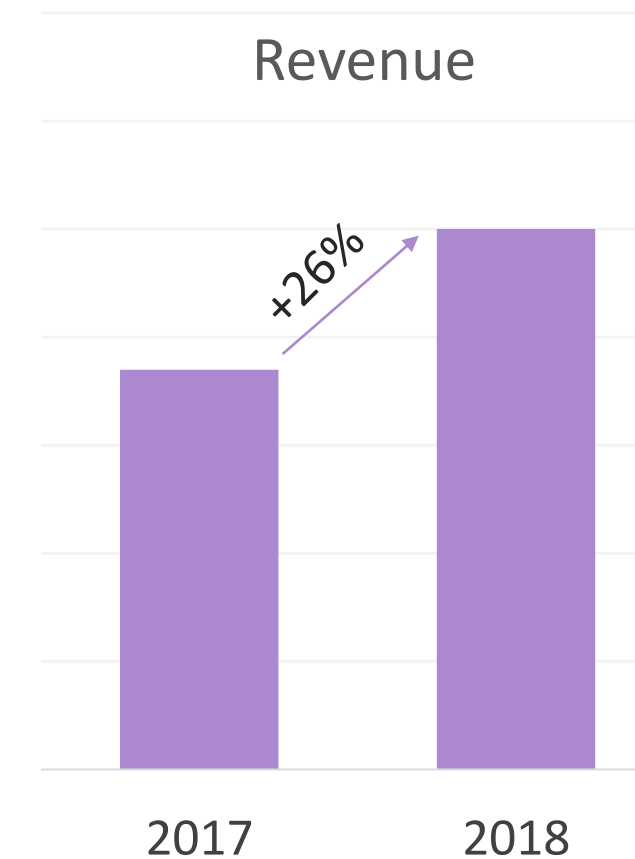
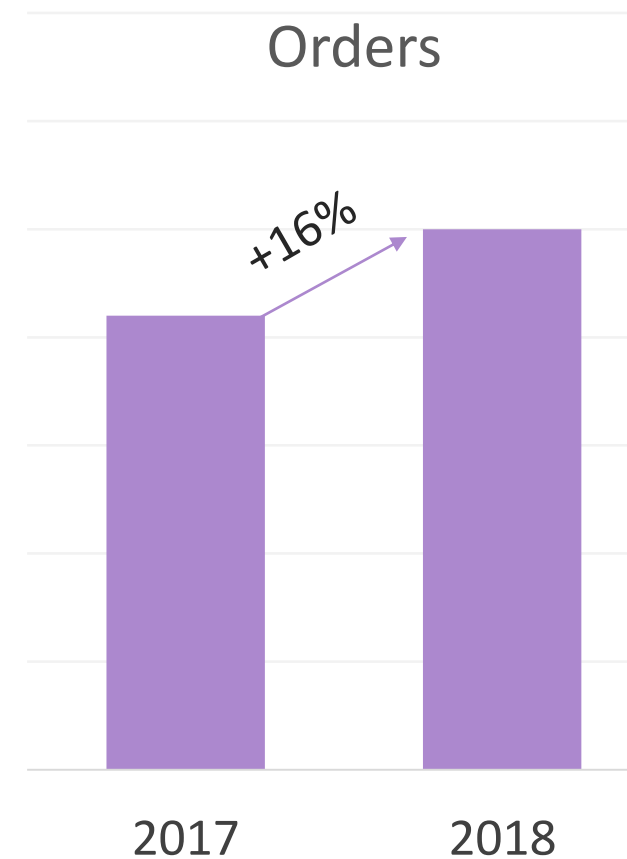


In 2018, online bookstores in the top 1,000 received **18.1 million orders**, amounting to **18.9 billion roubles**. The average order value (AOV) was **1,050 roubles**.

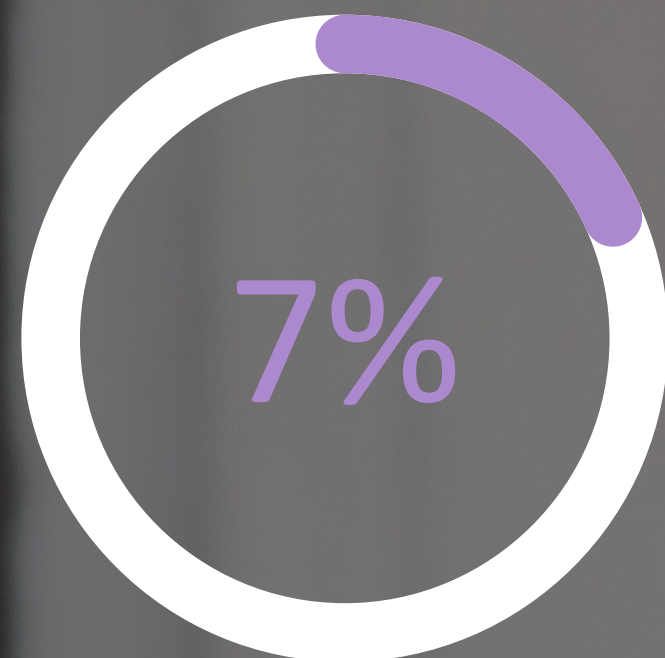


Market Dynamics

In 2018, the number of orders made in online bookstores rose by **16%**, and the amount of online sales increased by **26%**. AOV grew by **8%**.



Number of
Orders



Revenue



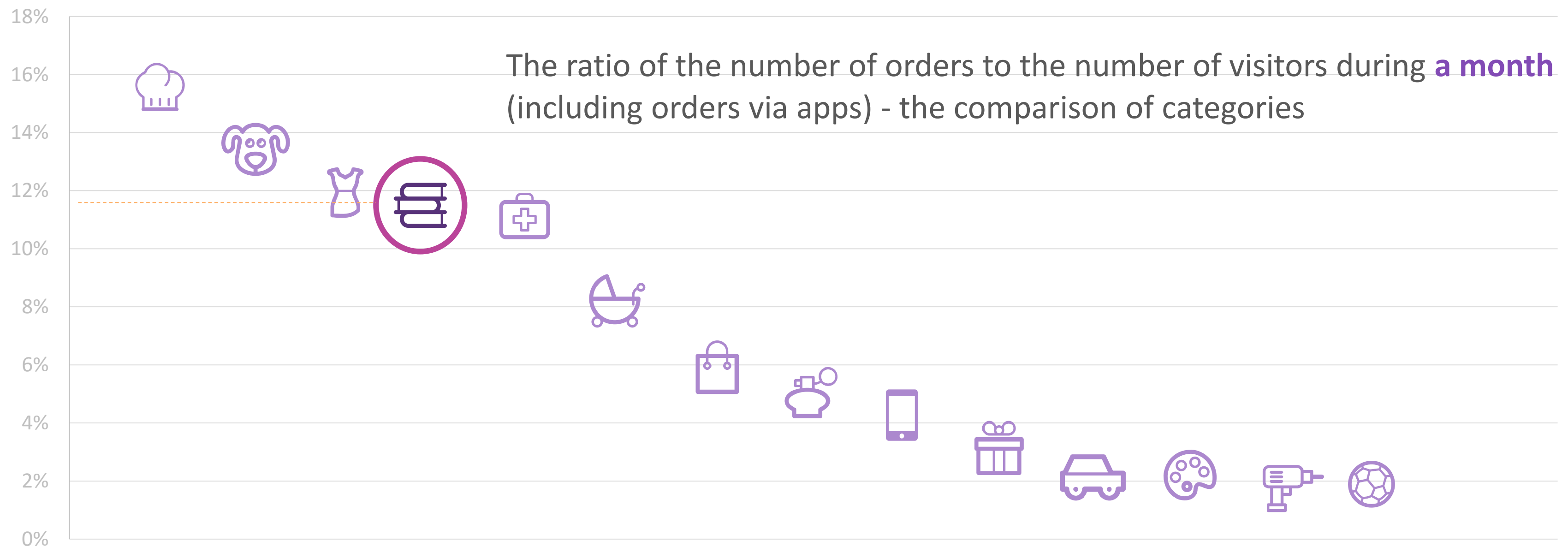
The Share of Bookstores in the eCommerce Market

In 2018, 7% of all online orders* took place in an online bookstore, representing a share in overall revenue of 2%.

**of the largest 1,000 stores*

The Conversion Rate of Online Stores

In the book sector, the conversion rate was **11.8%**. This rate is on par with that of medical supplies and clothes and footwear stores – 11.3% and 12% respectively.





Sector Composition



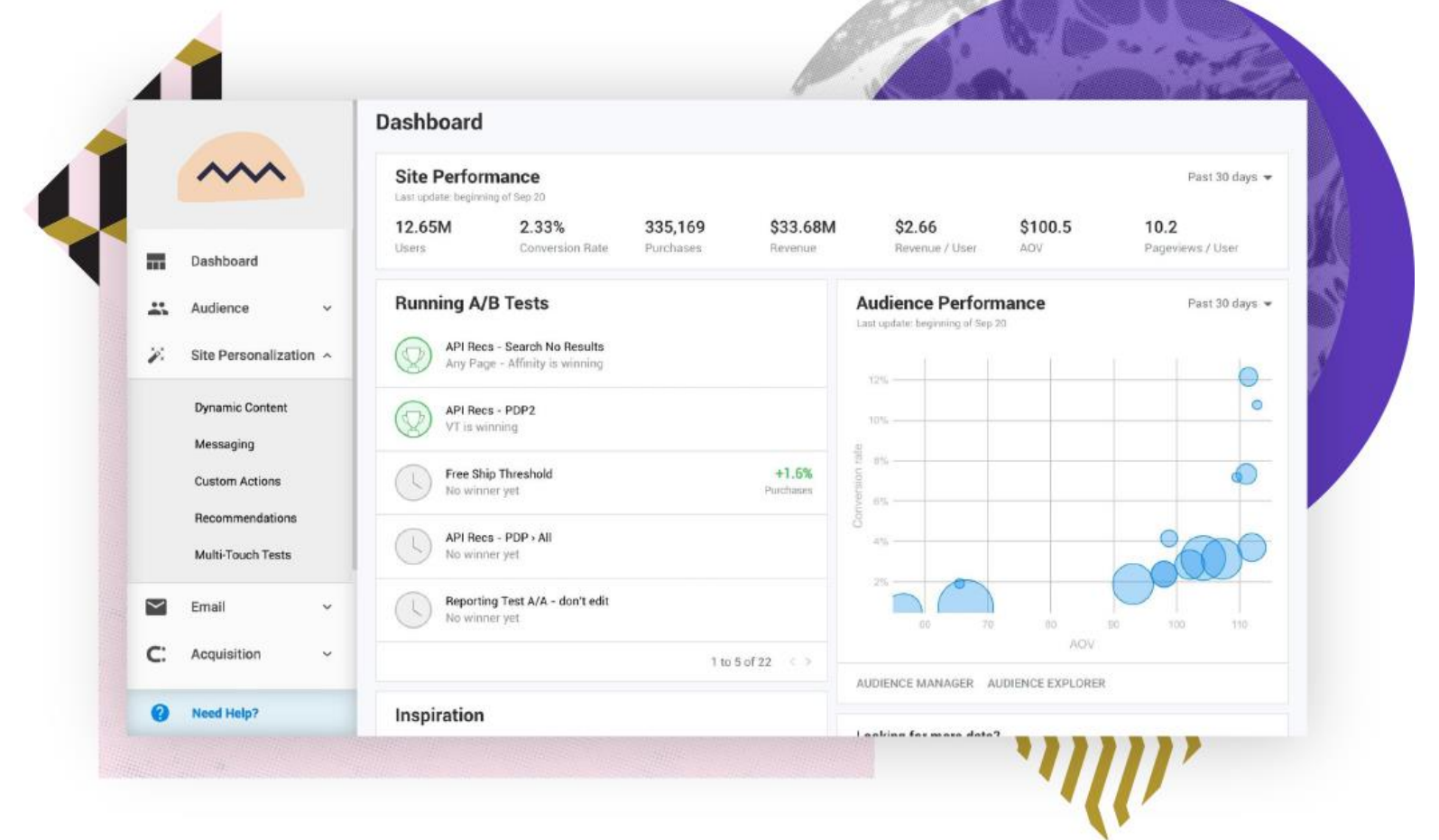
Bring true personalization from vision to reality

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.

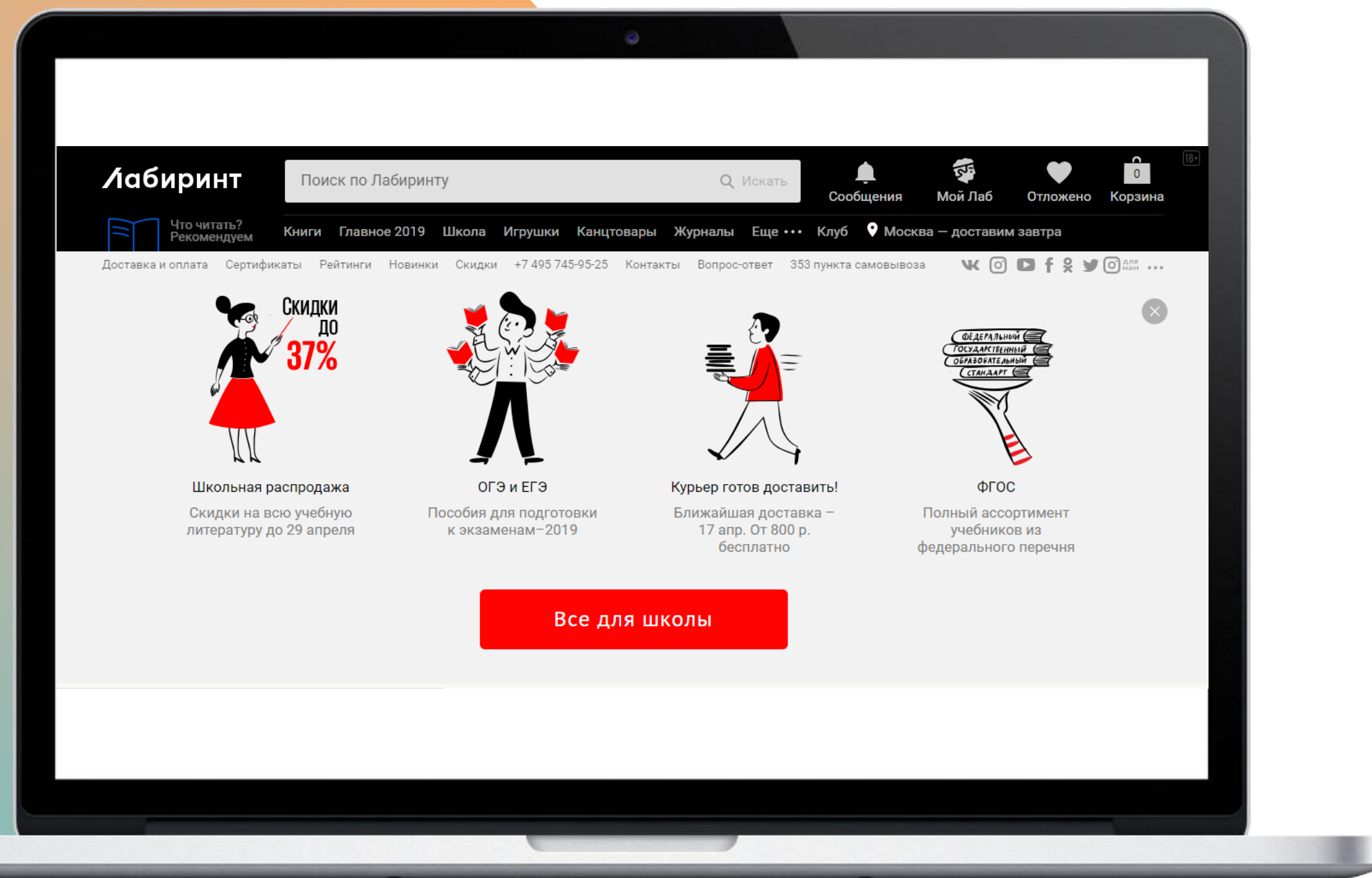
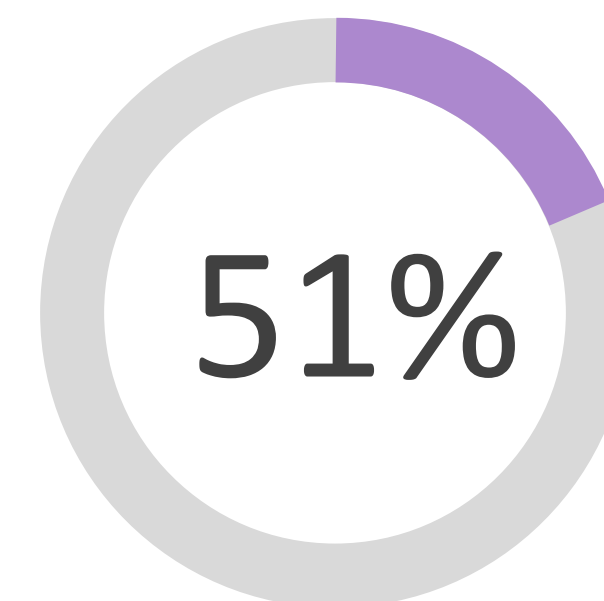


Triggering Engine

Trigger behavioral emails and push notifications to reduce abandonments.

Key player Labirint.ru

Labirint's share among the TOP 1,000 online bookstores in 2018 was:



TOP 10 Market Players*

1. **лабиринт.ру** Labirint.ru

2. **МУ-ШОП.РУ** My-shop.ru

3. **ЧИТАЙ ГОРОД** Chitai-gorod.ru

Other online stores in TOP10**:

books.ru

book 24

БУКВОЕД

deltabook.ru
магазин знаний

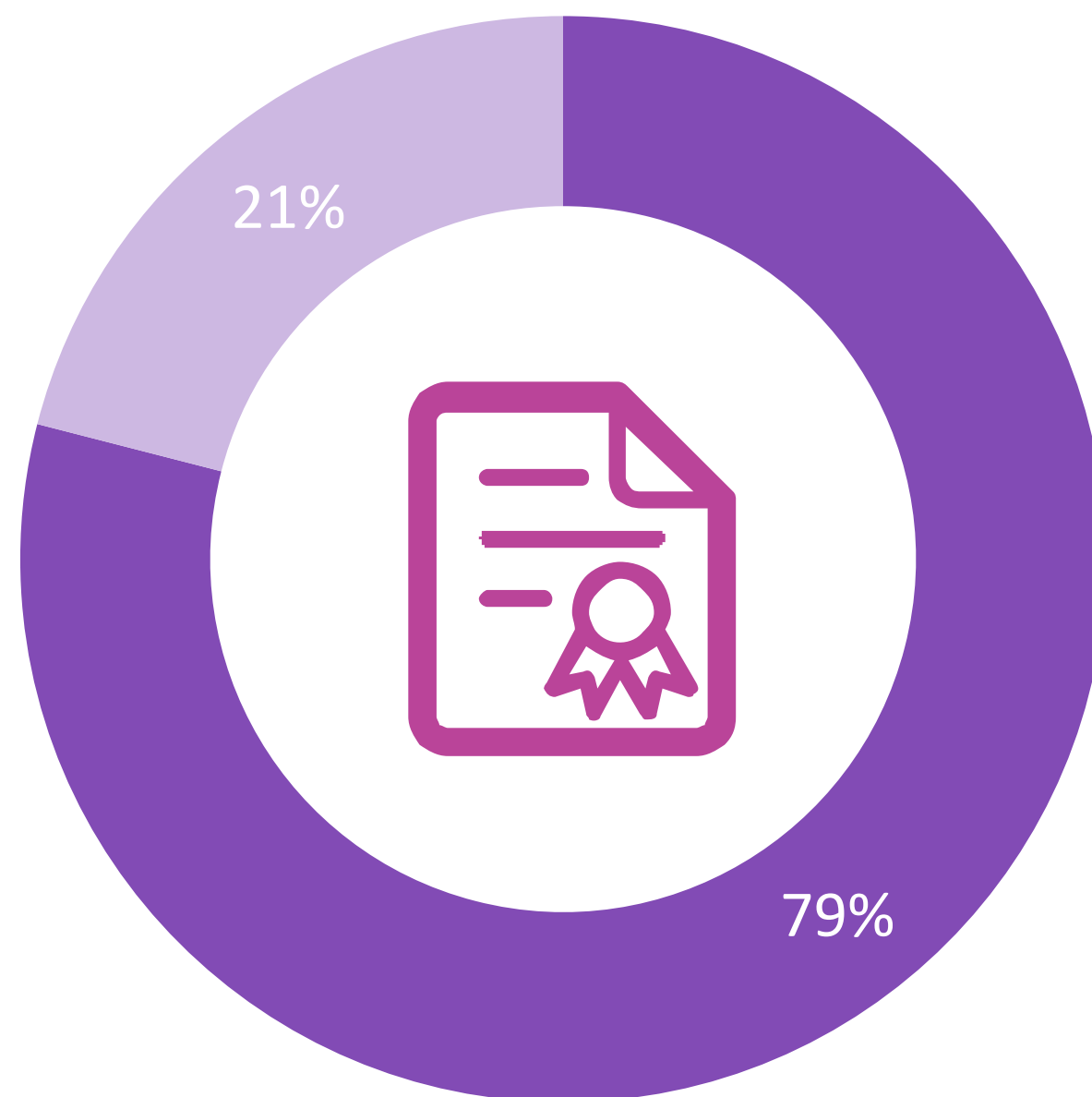
издательство
МАНН, ИВАНОВ И ФЕРБЕР

РЕСПУБЛИКА
КНИГИ МУЗЫКА ПЕРСПЕКТИВА

www.ukazkaru

* According to online sales

**In alphabetic order



■ LLC, JSC

■ Individual entrepreneurs

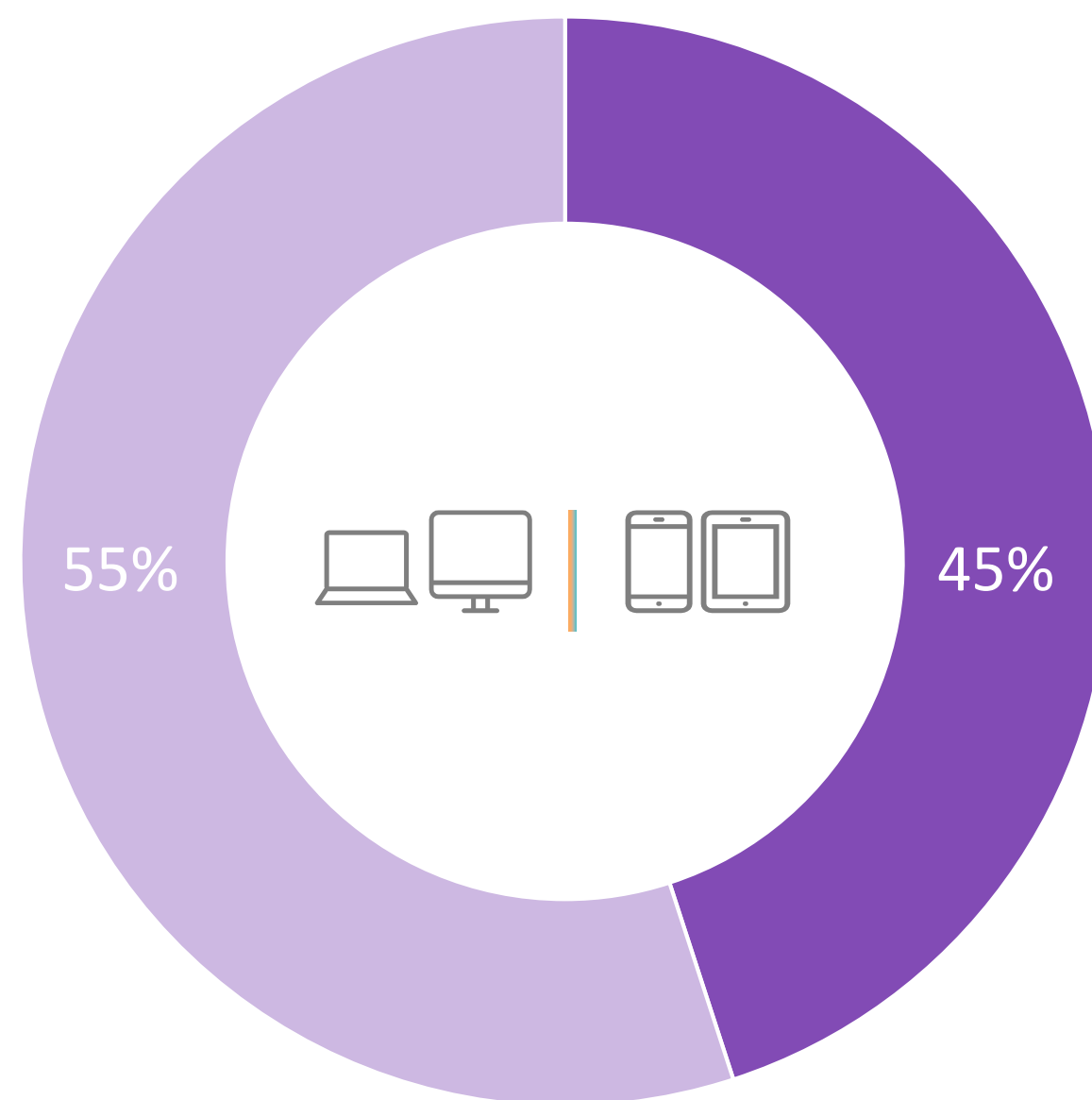
Retailer Composition

79% of the 1,000 online bookstores are companies (LLC, JSC). 21% can be attributed to individual entrepreneurs.



Mobile Commerce

Desktop vs. Mobile



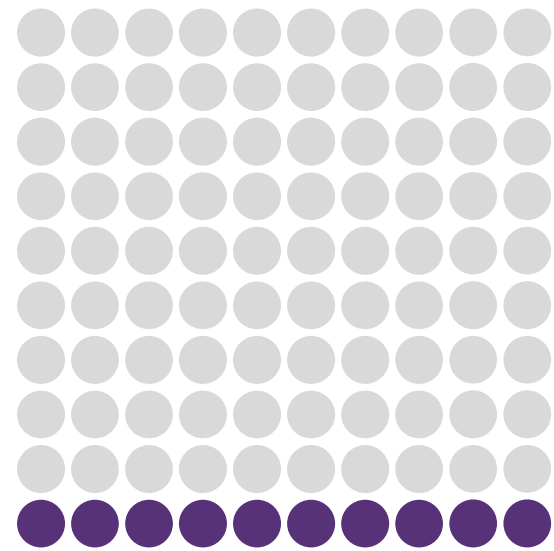
Customers are more likely to use desktop devices than smartphones and tablets to visit online bookstores.



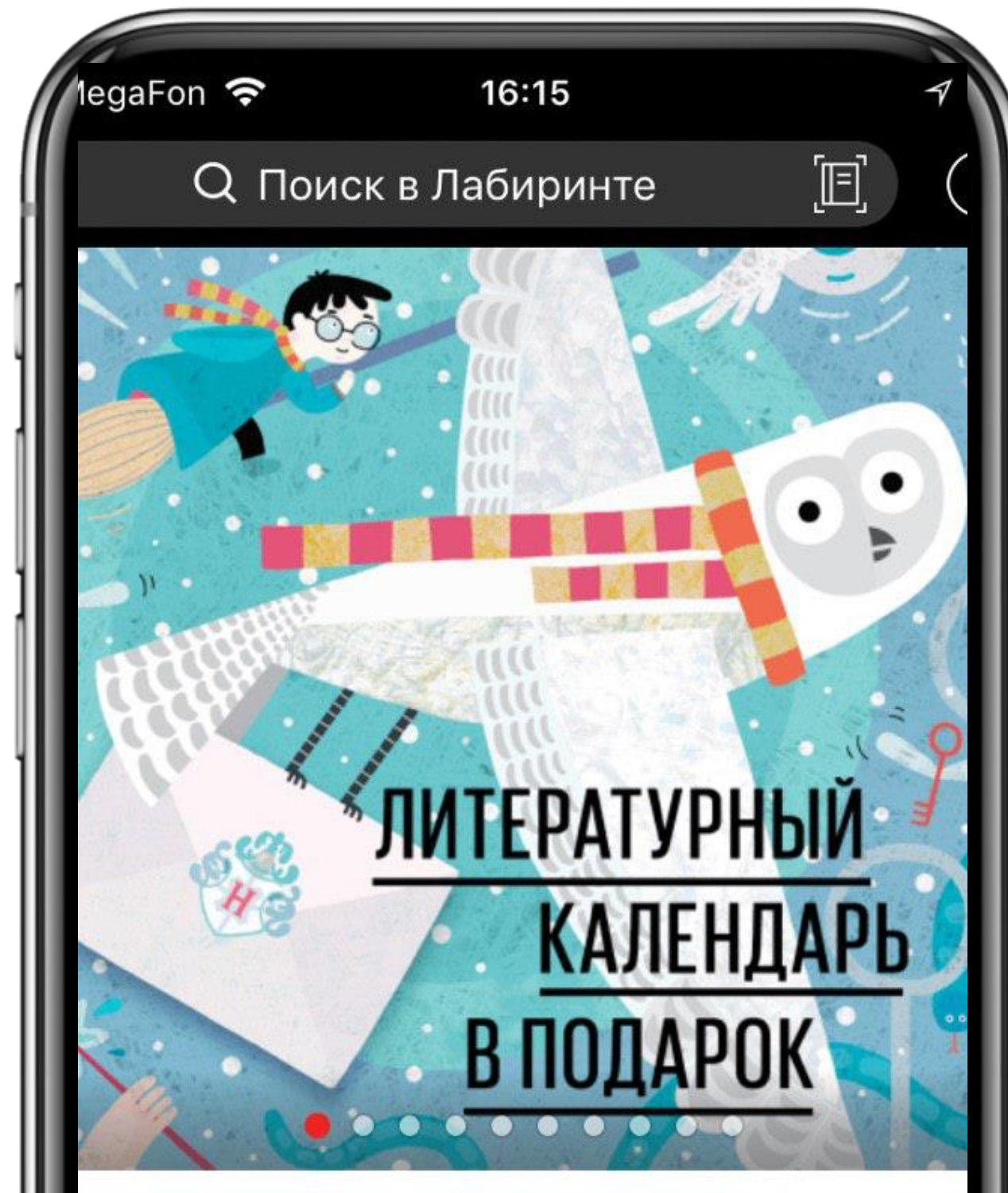
Mobile Apps

With over one million installs from the Google Play store, Labirint.ru has the most popular mobile app.

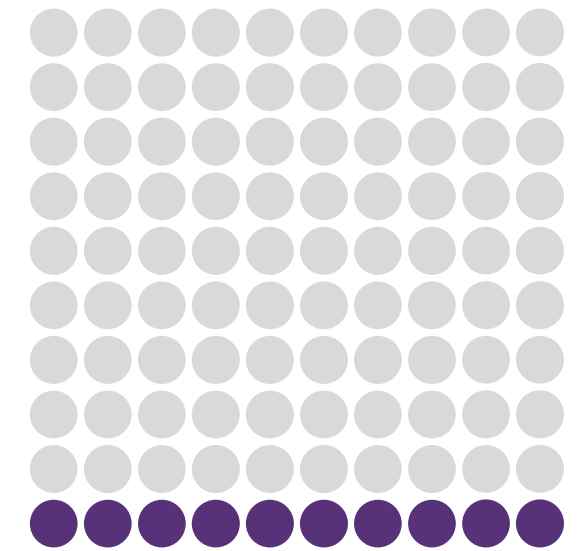
10%



Share of online bookstores with apps in the **Google Play** store



10%



Share of online bookstores with apps in the **iOS App Store**

Promotional Channels





Share of Traffic

More than half of the visits to the online bookstores are attributed to organic search (55%)

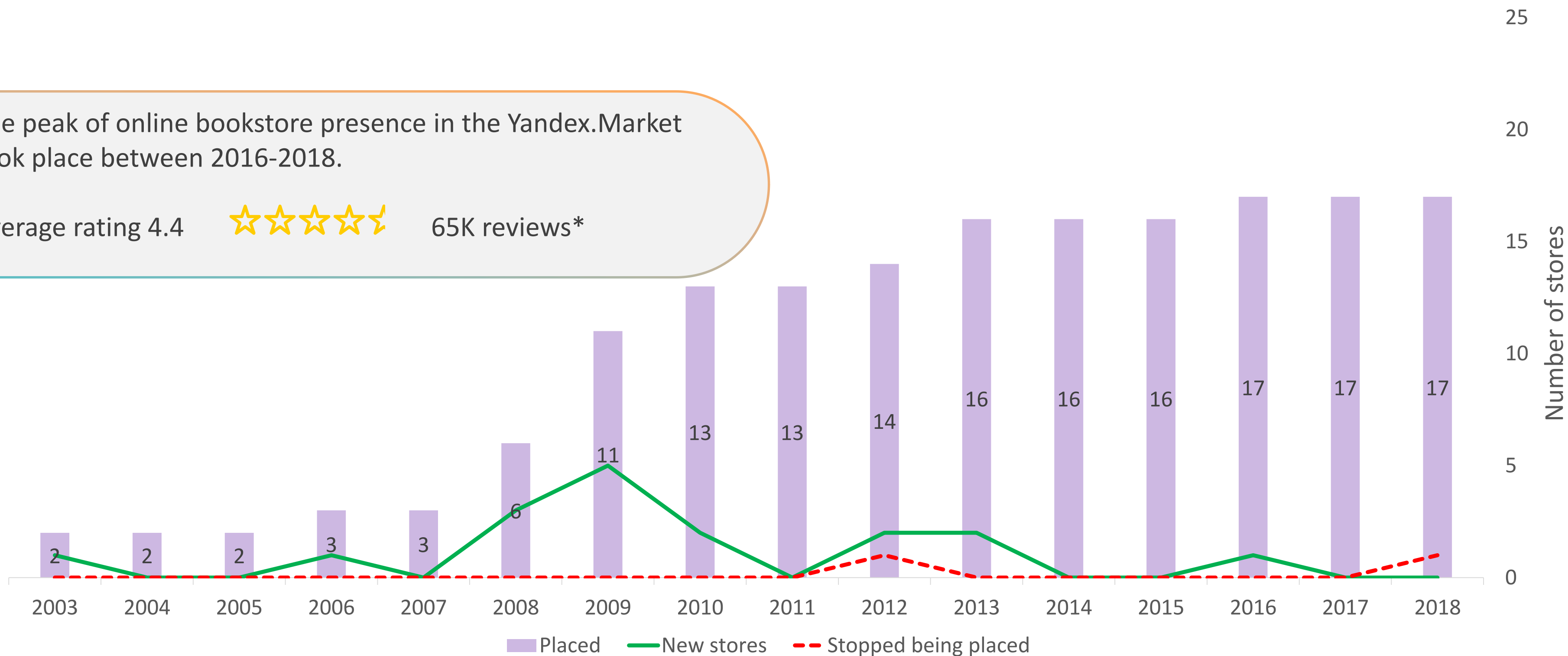
Presence in the Yandex.Market

The peak of online bookstore presence in the Yandex.Market took place between 2016-2018.

Average rating 4.4



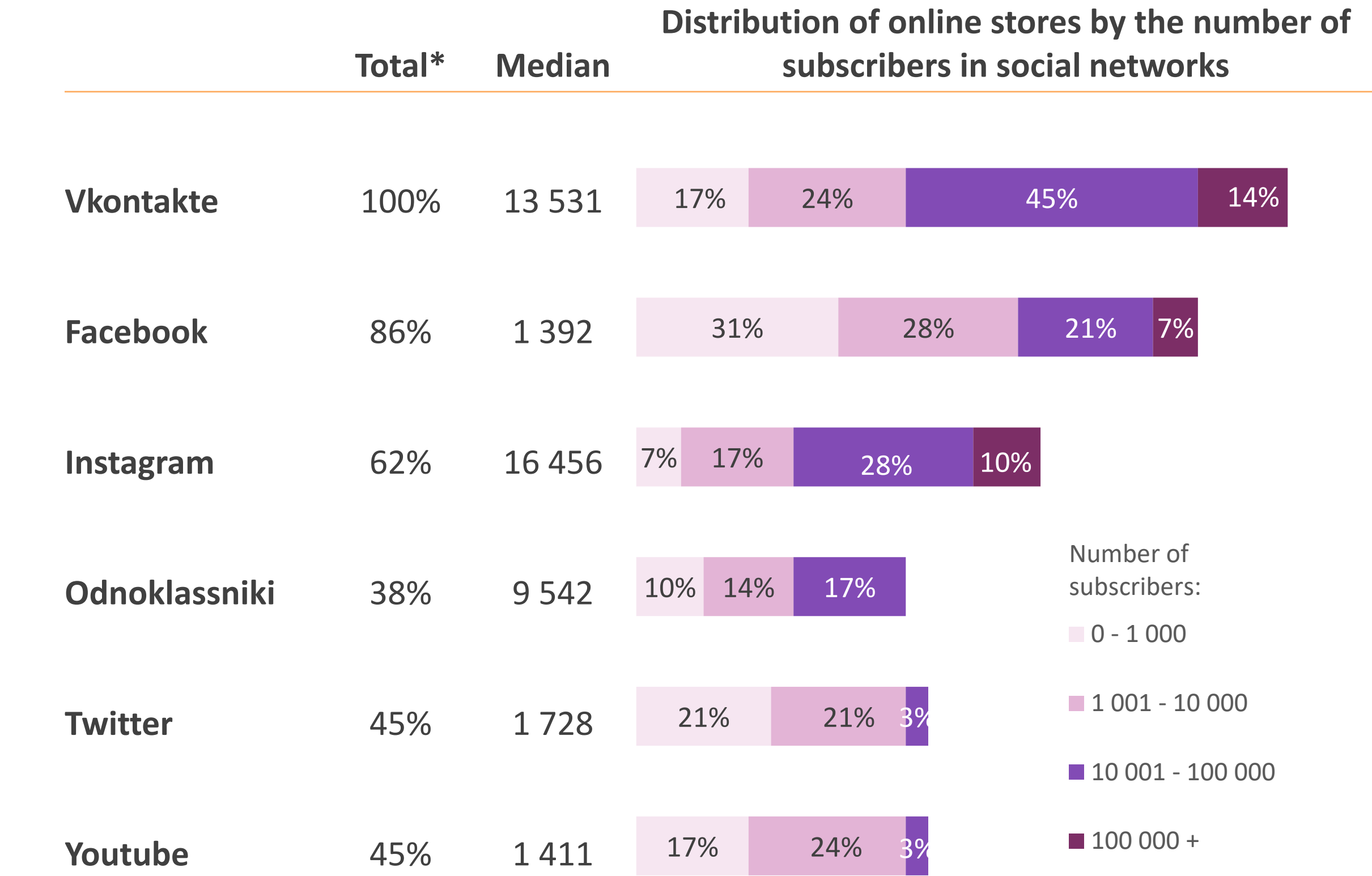
65K reviews*



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

Social Networks Activity

The most popular social network for book retailers is Vkontakte. All online bookstores have active accounts on Vkontakte, 15% of which have 100,000+ subscribers.

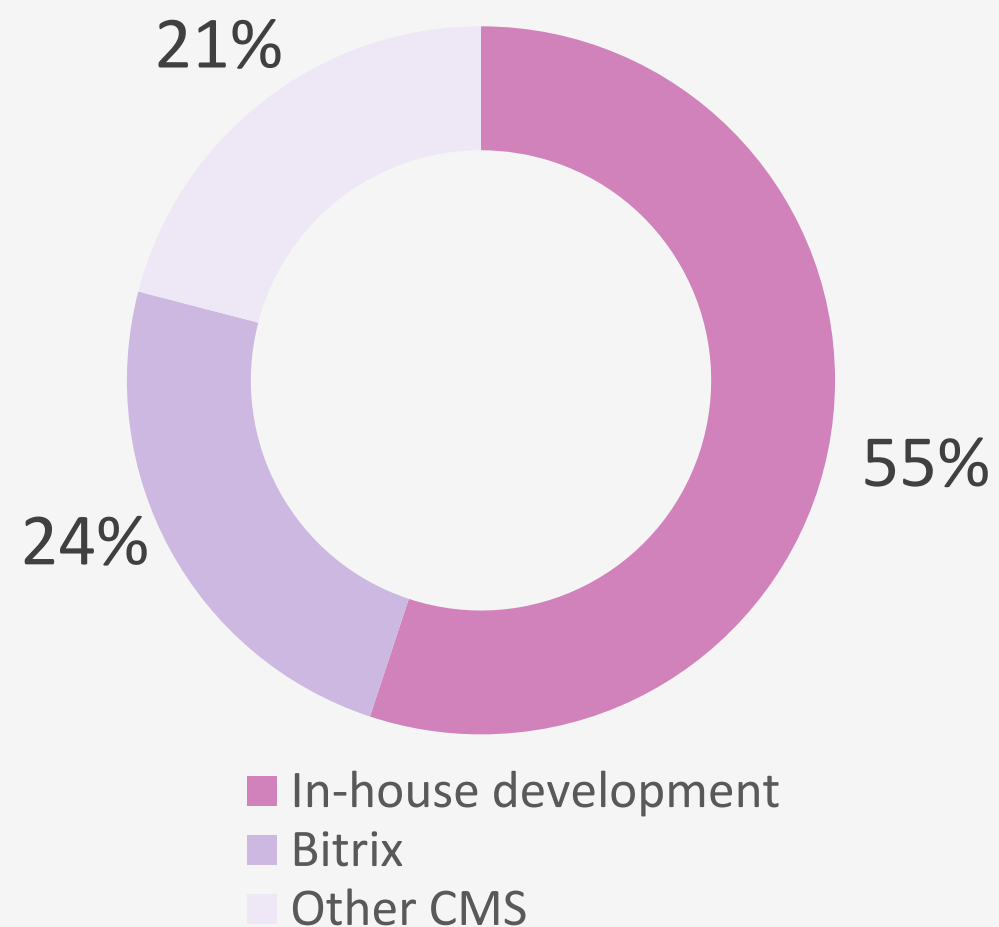


*the percentage of online stores using the respective social network and median of number of subscribers specified

A woman with long, wavy blonde hair is sitting on a large, dark rock in a grassy field. She is wearing a dark red top and a long, light-colored lace skirt. She is holding an open book and appears to be reading. The background is a soft-focus landscape with green grass and trees. A circular graphic with a gradient border (from orange to teal) is overlaid on the image, containing the word "Technology" in white text.

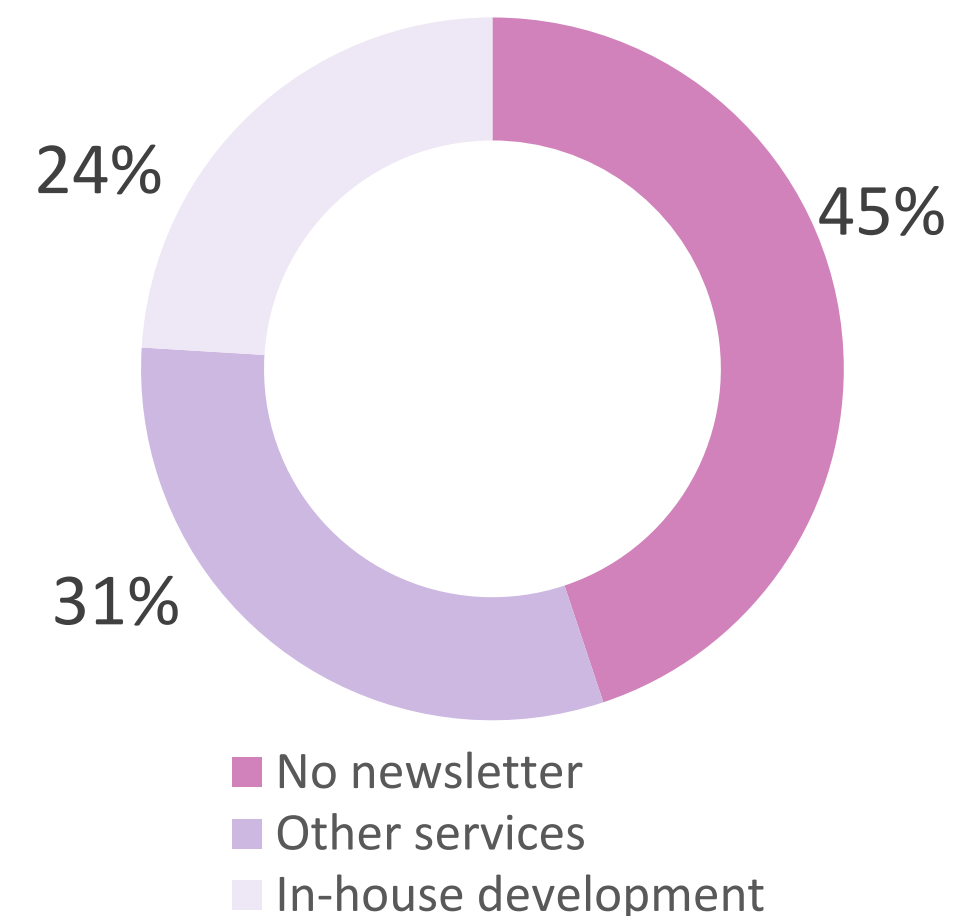
Technology

CMS



55% of the online bookstores use their CMS's (Content Management System or tool for creating, managing and editing website content). 24% of stores use Bitrix, and the other 21% use other services.

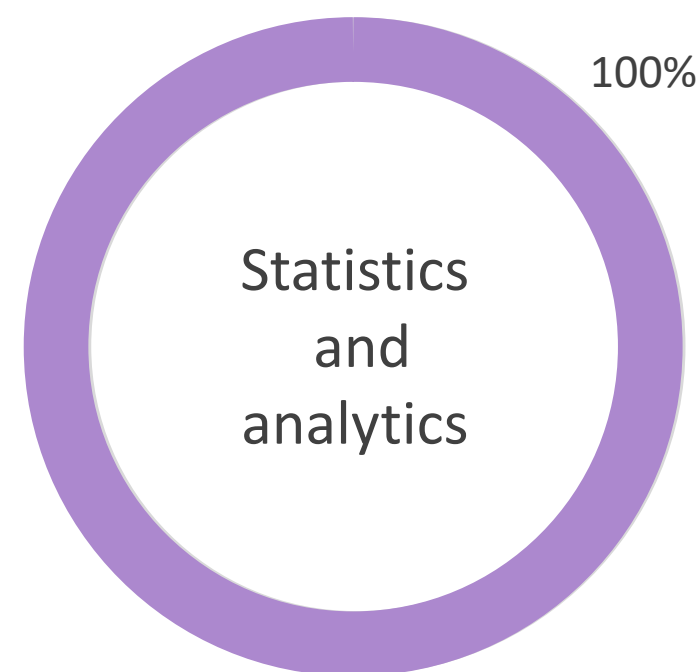
Newsletter



45% of online stores do not send newsletters about their events and promotions. 24% use newsletters they've developed. 31% use other services.

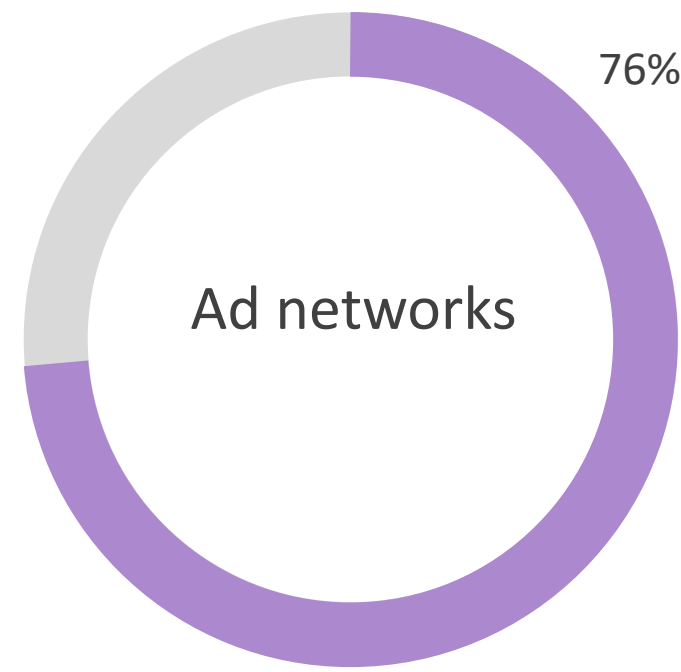
Marketing Services

Share of online stores using marketing services



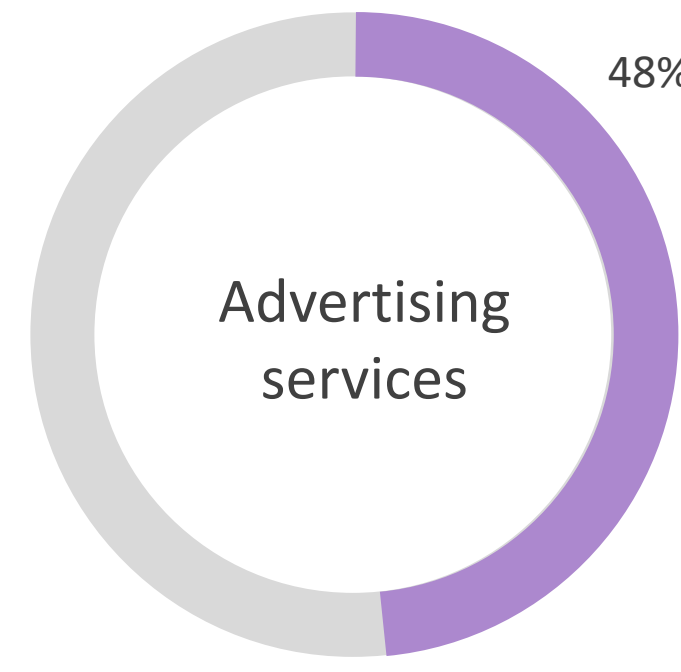
Yandex.Metrics, Google Analytics, calltracking systems, other services that track traffic and customers behavior on the website

🏆 Yandex.Metrics— 93%



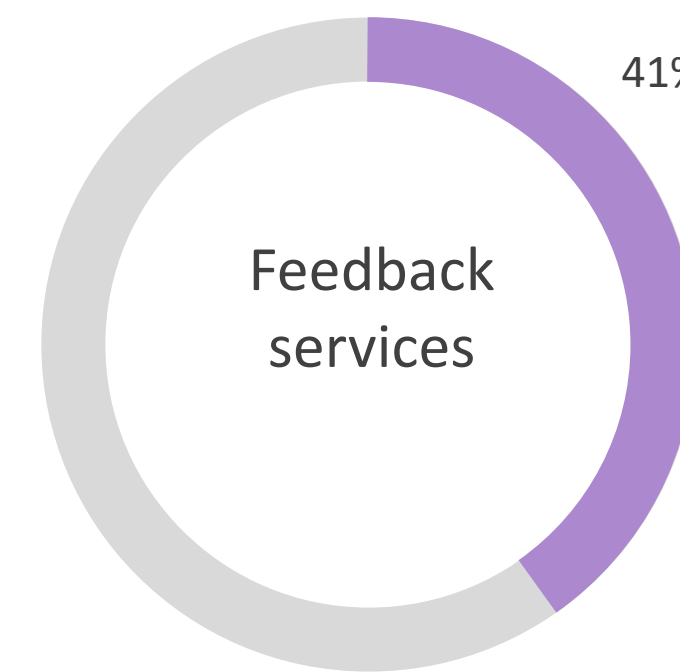
Networks for placing ads on pages of other ad network participants

🏆 DoubleClick (Google Display&Video 360) - 72%



Advertising management and personalization services

🏆 Facebook Custom Audiences – 31%



Online chats, online calls and callback services

🏆 JivoSite – 24%



News

News in Russia 2018

- December Online sales of books rose more than 25% in 2018.
- November Over 22% of Moscow residents voted *Chitai-gorod* the “Best bookstore in Moscow,” awarding it the top spot.
United retail network *Chitai-gorod - Bookvoed* expands to more cities and regions.
- September The growth of the book market is supported by online sales.
The biggest online bookstore, *Labirint*, went out of business.
- July Moscow book stores revealed what foreigners buy there.
- May Paper books will survive the long term, a major publisher writes.
- February *Alpina* and *Azbuka-Atticus* refused to buy through the biggest online bookstore.

Look out for more news in our weekly eCommerce updates.

Subscribe

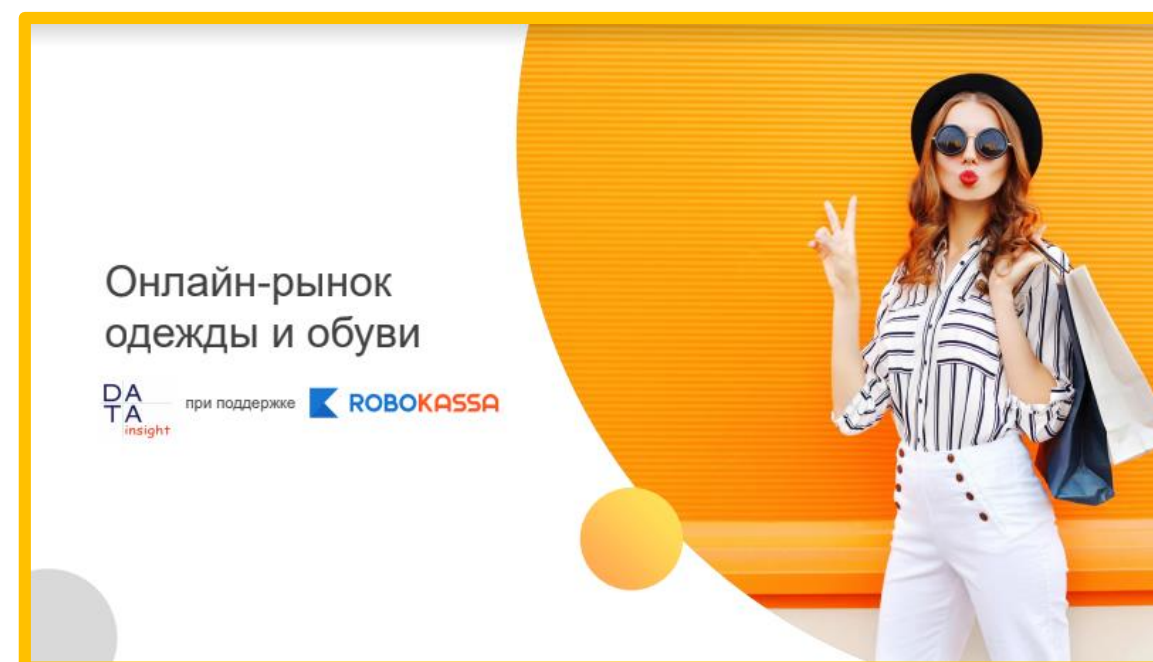
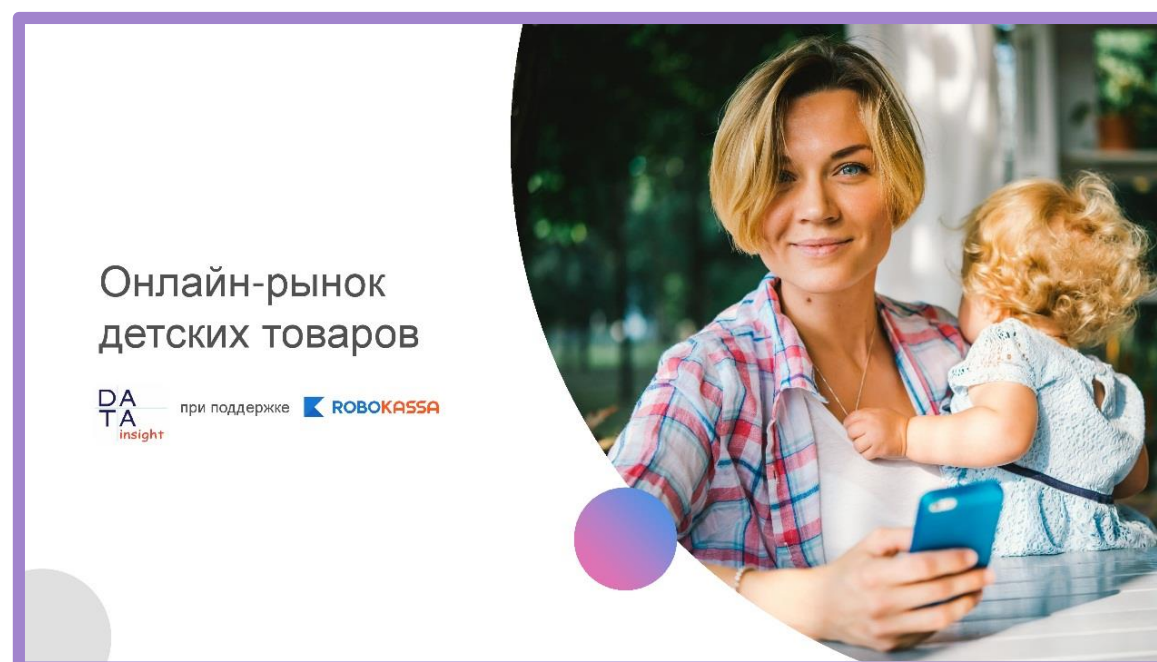
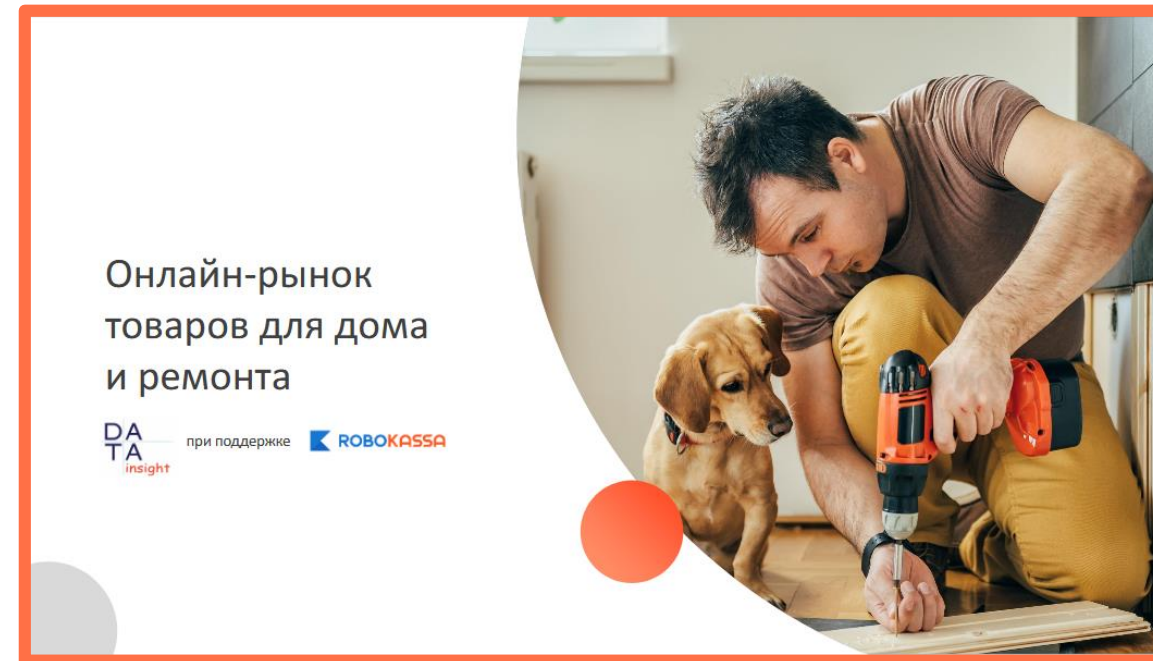
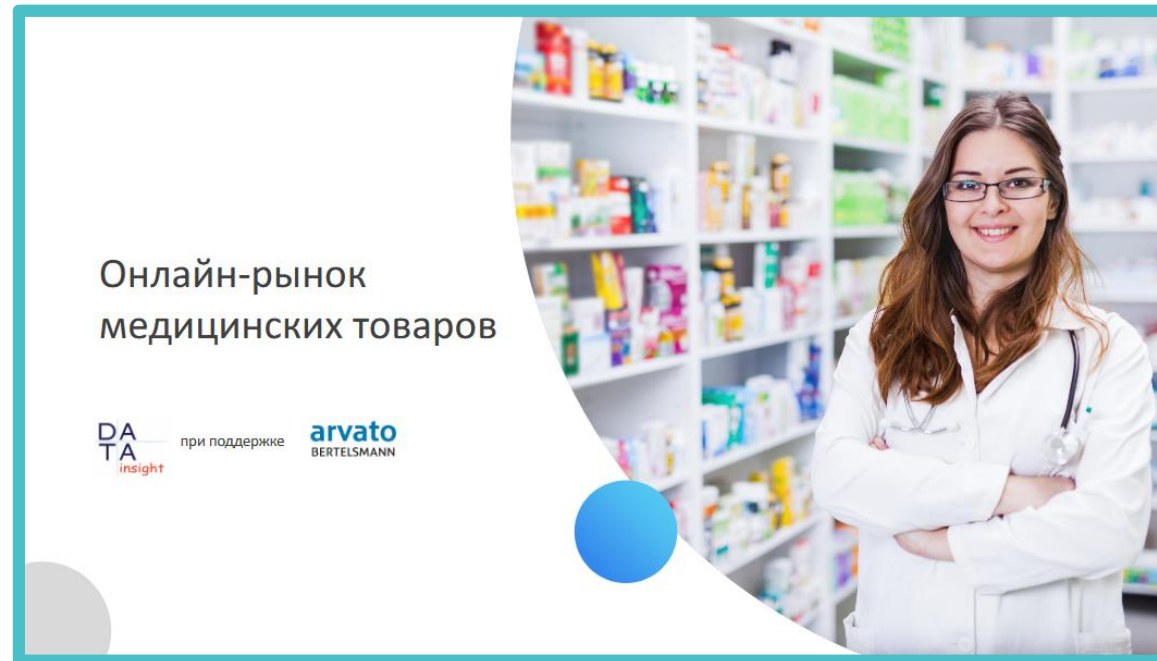
World news 2018

- December The second-hand book trade booms.
Going into 2019, the publishing industry is excited about audio.
- November Amazon excludes second-hand Russian book retailers.
- September Book industry trends: 2018.
- August Amazon self-published authors: «Our books were banned for no reason».
- July Book sales boom but authors report shrinking incomes.
The latest trends in books, Ebooks and Audiobooks.
- January A changing book business: it all seems to be flowing directly to Amazon.

Look out for more news in our weekly eCommerce updates.

Subscribe

Our Sector Reports



New sector reports on the horizon:



Sports – April 23rd



Dept. stores – May 14th



Food – May 28th



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:

 +1 (888) 784-1905

 info@dynamicyield.com

 dynamicyield.com

 facebook.com/DynamicYield

 linkedin.com/company/dynamic-yield


 twitter.com/DynamicYield

 youtube.com/c/Dynamicyield

Data Insight

Data Insight - the first agency specializing in research and consulting in e-commerce area and other Internet markets

Learn more:

 +7 (495) 540 59 06

 a@datainsight.ru

 datainsight.ru



Public research

[Read](#)



E-commerce news monitoring.

[Subscribe](#)



facebook.com/DataInsight



[Slideshare.net/Data_Insight](https://slideshare.net/Data_Insight)



t.me/DataInsight



zen.yandex.ru