

The State of Sporting Goods Online Market in Russia

Public Version



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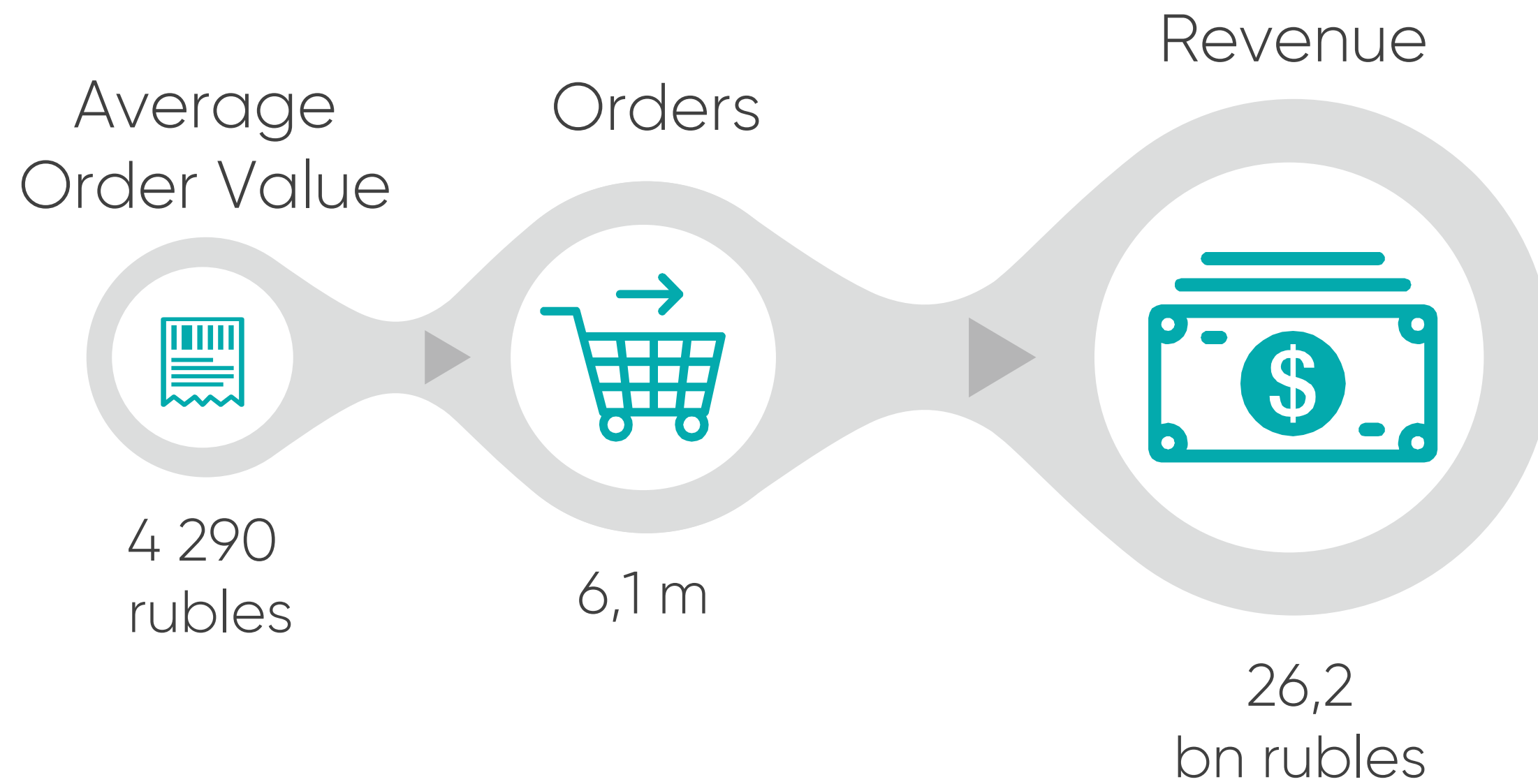
Research Methodology

1. The report examines sporting goods online market, i.e. online retailers selling sporting equipment, clothing and shoes, camping and outdoor activities goods, fishing and hunting equipment (including weapons).
2. An online store is a website or mobile app where users can place orders by filling out a form or by adding products to a virtual cart. Online sales of Russian retailers only are taken into account (via Russian websites and mobile apps) without online sales of foreign retailers, multi-category stores and marketplaces.
3. The data in the report covers all online retailers of sporting goods that are members of Russia's eCommerce TOP1000 list (for the year 2019, by number of orders). The number of such retailers is 41. Estimates for the number of online orders are based on regular monitoring of online retailers, data provided by retailers themselves, or information found in the public domain.
4. We are applying automatic parsing to determine which third-party services are used by online stores. In difficult cases, we are layering in manual analysis.

Key Figures



Sporting Goods Online Market Size



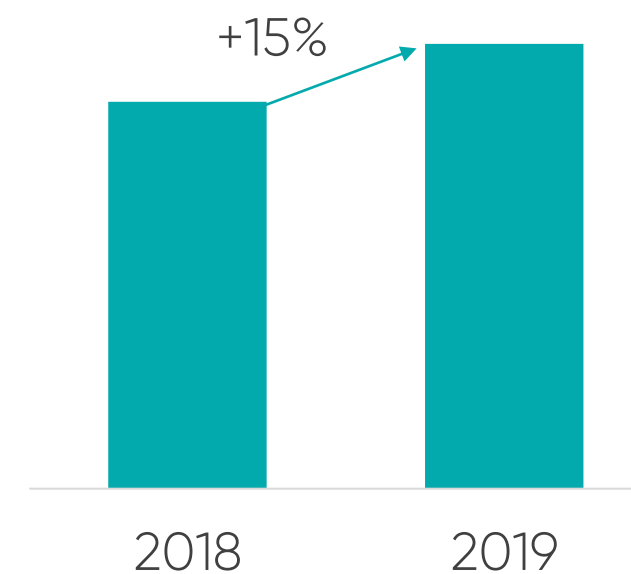
For the year 2019, online retailers of sporting goods (41 retailers making eCommerce TOP1000 list) received **6,1 million orders** amounting to **26,2 billion rubles**. The average order value (AOV) was **4 290 rubles**.



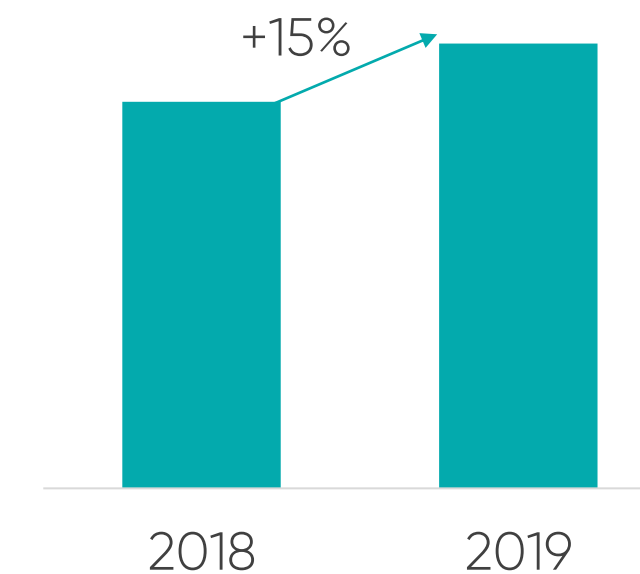
Market Dynamics

For the year 2019, the number of orders in sporting goods online stores grew by **15%**, and the amount of online sales increased by **15%**. AOV did not change.

Orders



Revenue



Number of
Orders



Revenue

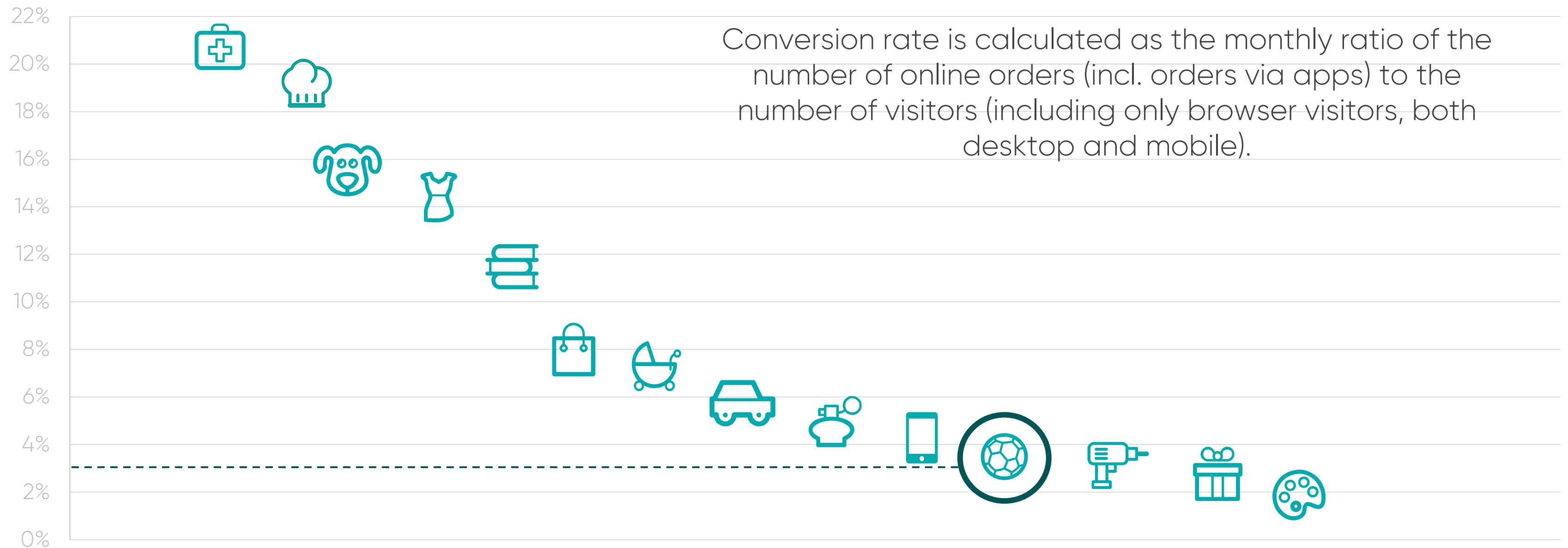


The Share of Sporting Goods Online Stores in eCommerce Market

For the year 2019, online retailers of sporting goods stand for **1,4%** of all domestic online orders and **1,6%** of related online sales volume.

Average Conversion Rate of Online Stores

In the sporting goods segment, the conversion rate is **3,1%**. The nearest rates are in the segments of consumer electronics and DIY – 4% and 3% respectively.



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- Customer service
- IT solutions
- Transport management
- Loyalty programs development
- Financial services

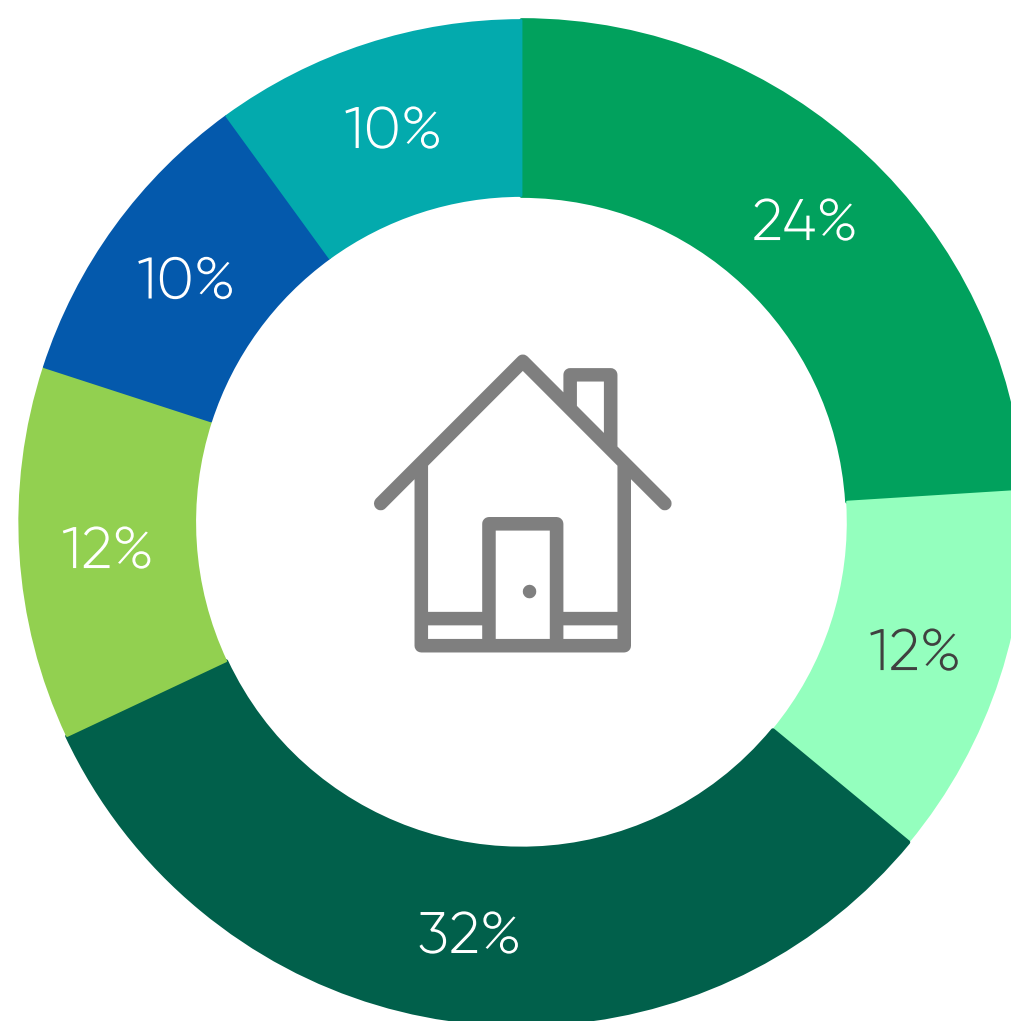
Segment Composition



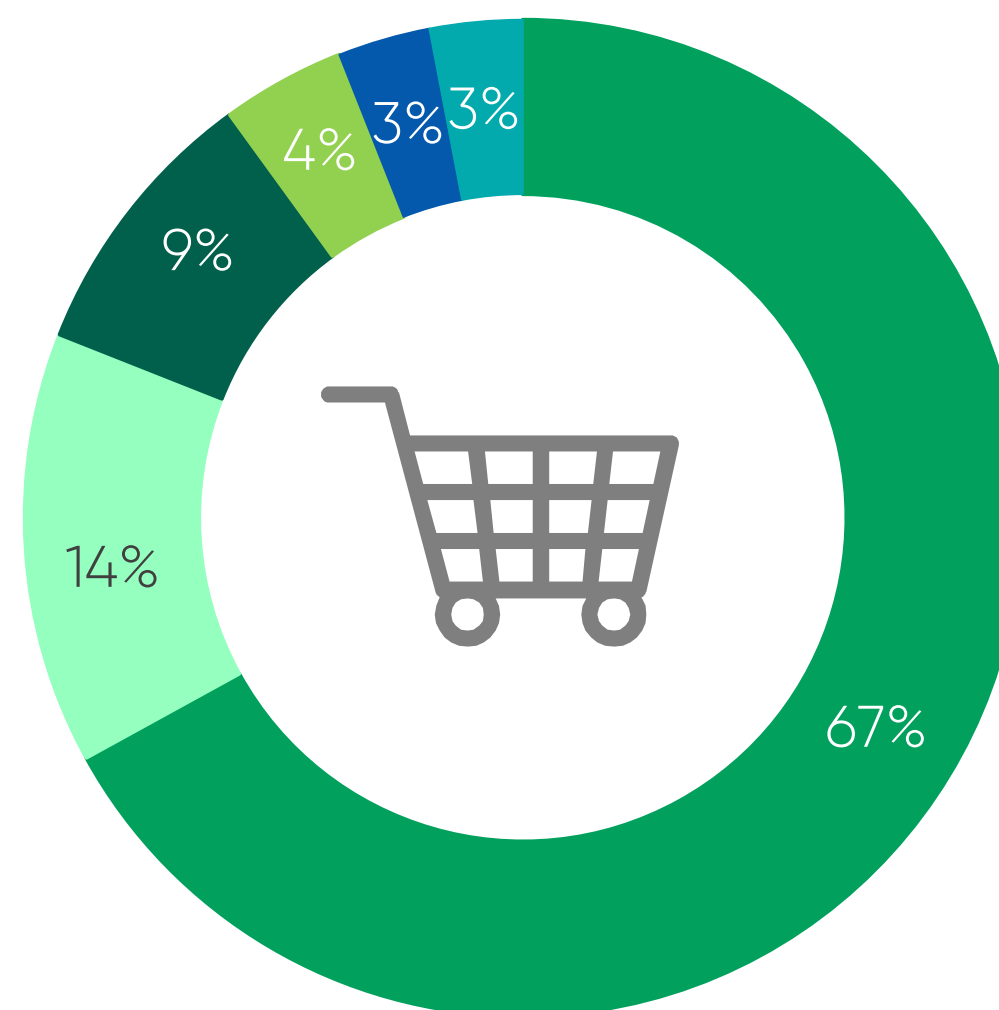
Segment Structure

List of TOP1000 online sellers includes 41 online retailers of sporting and outdoor activities goods. Online stores selling tourism and fishing equipment and general sports goods constitute 56% of all segment participants. Non-specialized (general) online stores lead by the number of orders and by the revenue (67% and 56% respectively). Sports clothes online stores ranks next (14% by the number of orders and 19% by the revenue).

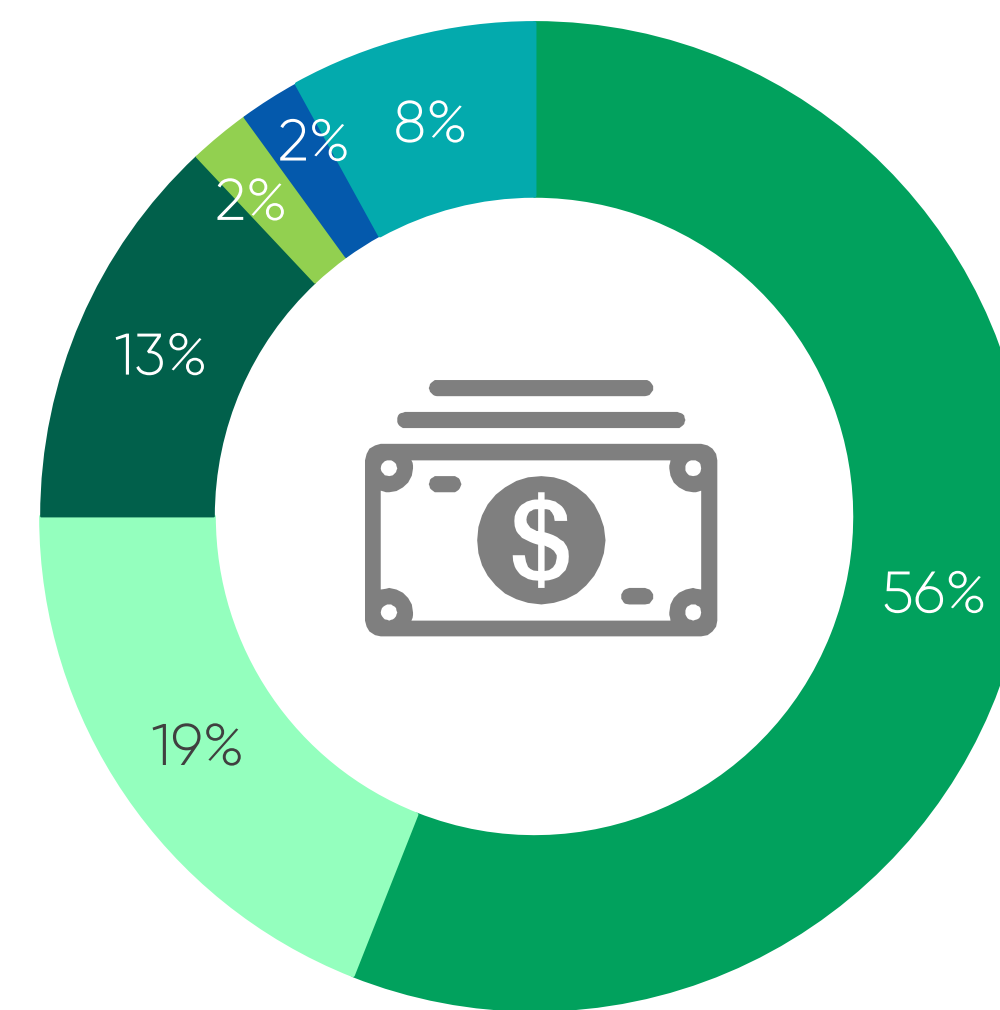
Number of shops



Number of orders



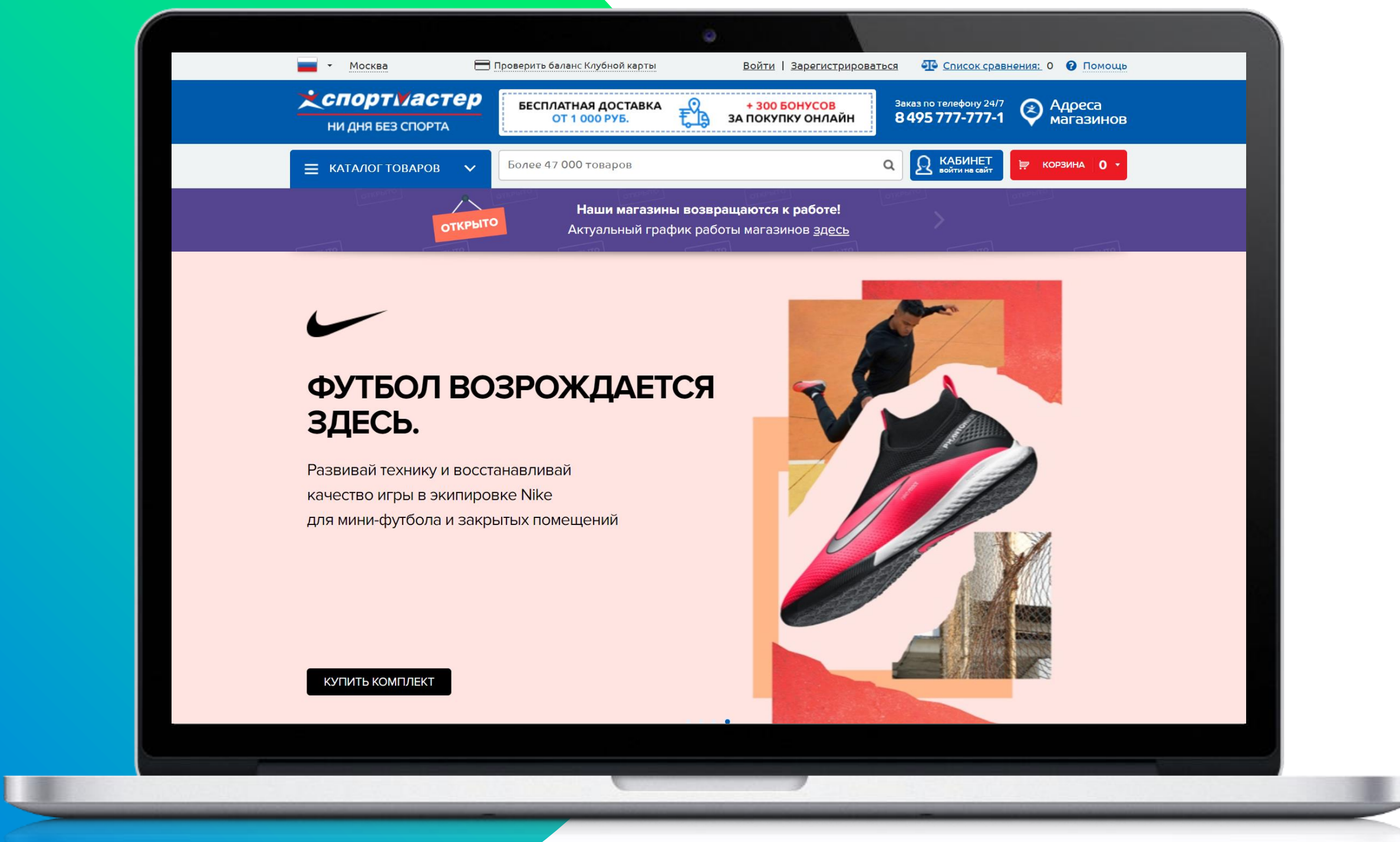
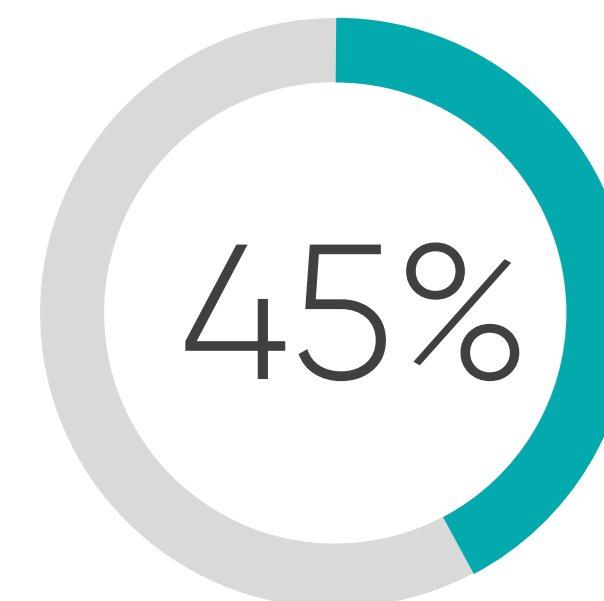
Revenue



- General
- Sports clothes
- Tourism and fishing equipment
- Hunting equipment and weapons
- Sports nutrition
- Bicycles, skis, boards

Key Player Sportmaster.ru

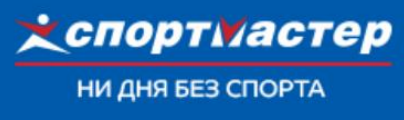


Sportmaster.ru share among the sporting goods online stores* for the year 2019 (by volume of online sales):



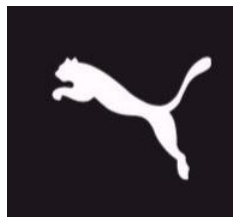
* Considering online retailers making eCommerce TOP1000 list by the number of orders, without "long-tail" figures (retailers outside general TOP1000)



TOP10 Market Players*

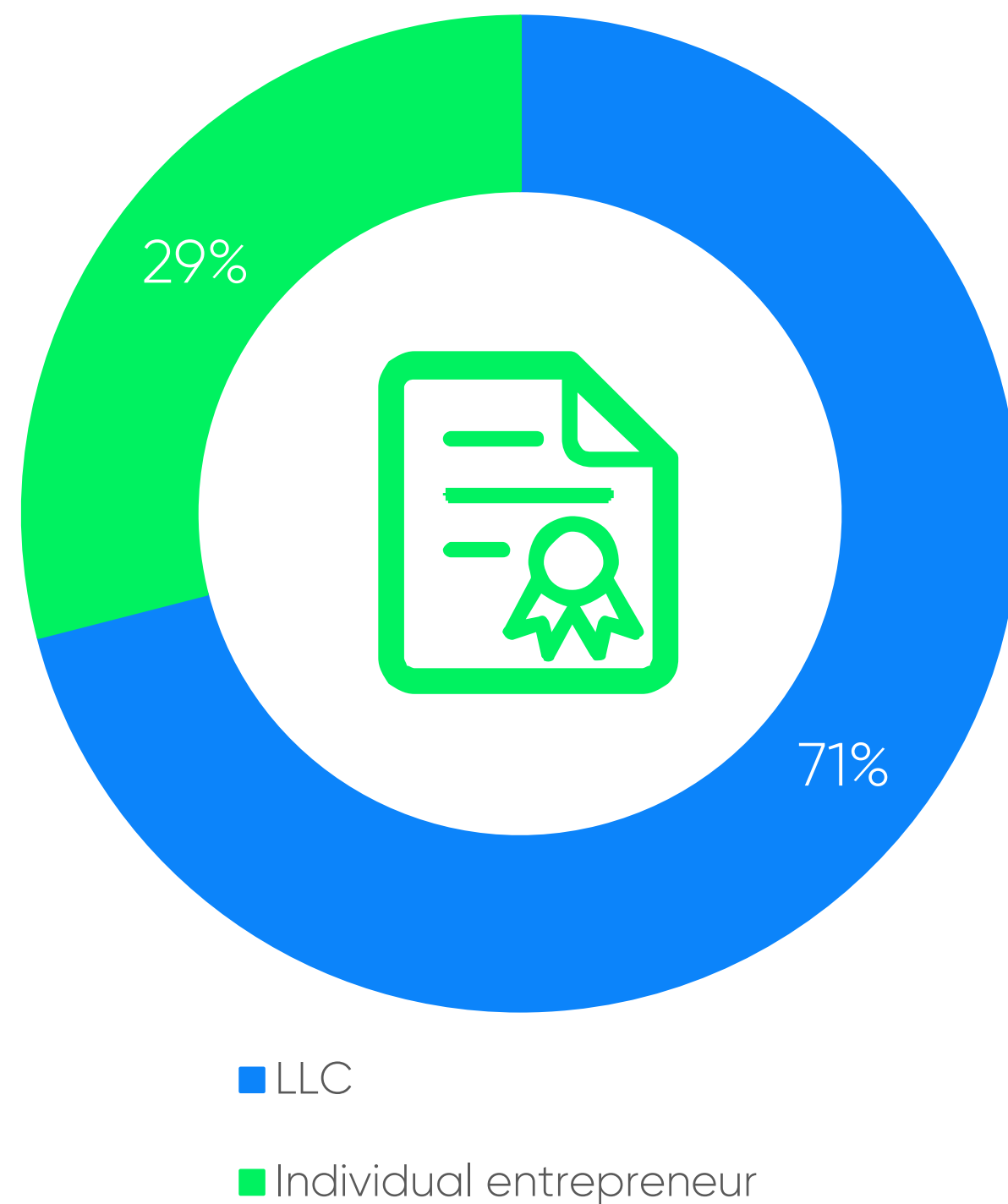
1.  Sportmaster.ru
2.  Adidas.ru
3.  Kant.ru

Other online stores in TOP10**:



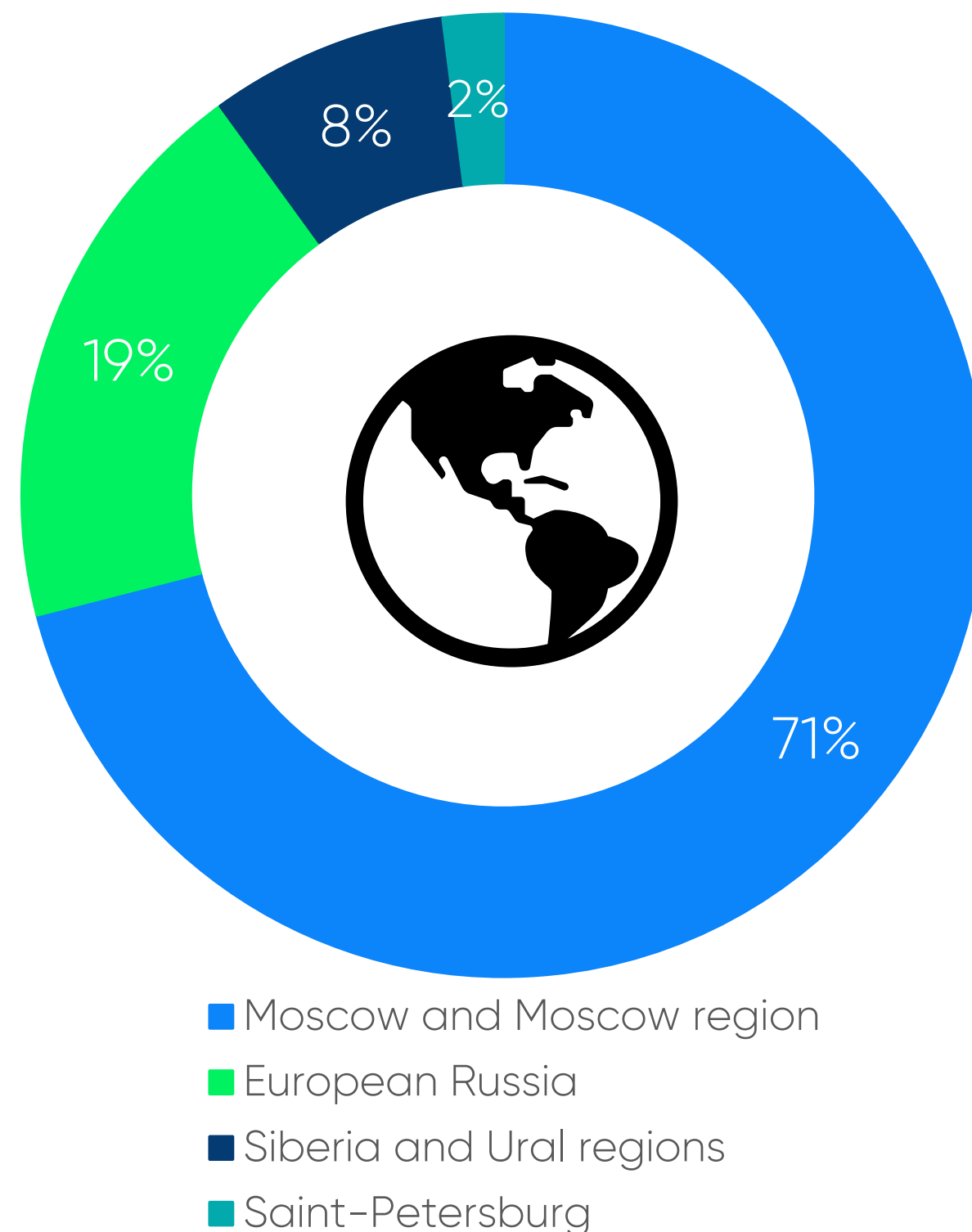
* By volume of online sales

**In alphabetic order by domain name



Retailers by Legal Status

71% of the sporting goods online retailers are companies (LLC). 29% are registered as individual entrepreneurs.



Online Retailers Geography*

71% of the 41 largest online stores in the segment (TOP1000 participants) are registered in Moscow or the Moscow region. 19% are based in European Russia (10% for Volga Federal District). 8% is accounted for Siberia and Ural regions, and 1 project (2%) – for Saint-Petersburg.

* According to place of online store registration

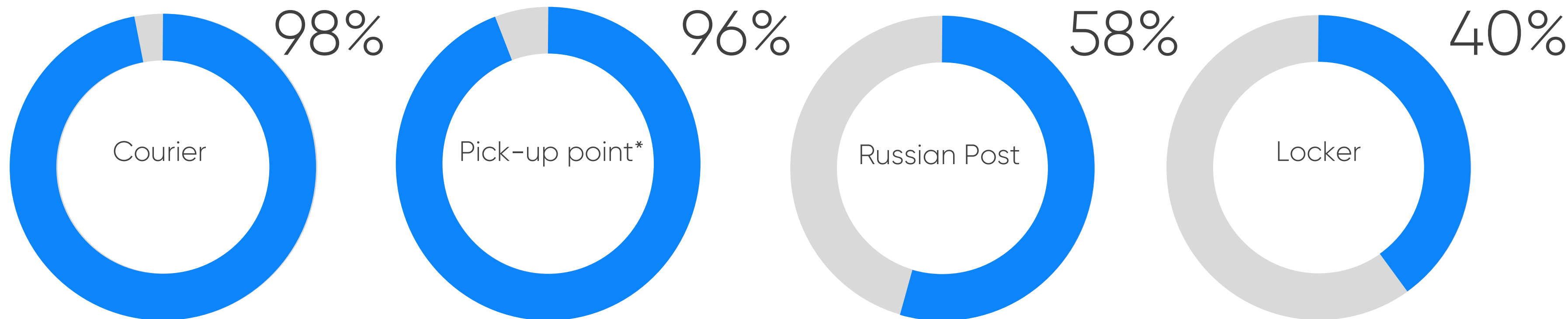


Delivery



Delivery Methods

Share of online stores using different delivery methods



34% of sporting goods online stores use all delivery methods mentioned above (2 of these stores are TOP10 participants)

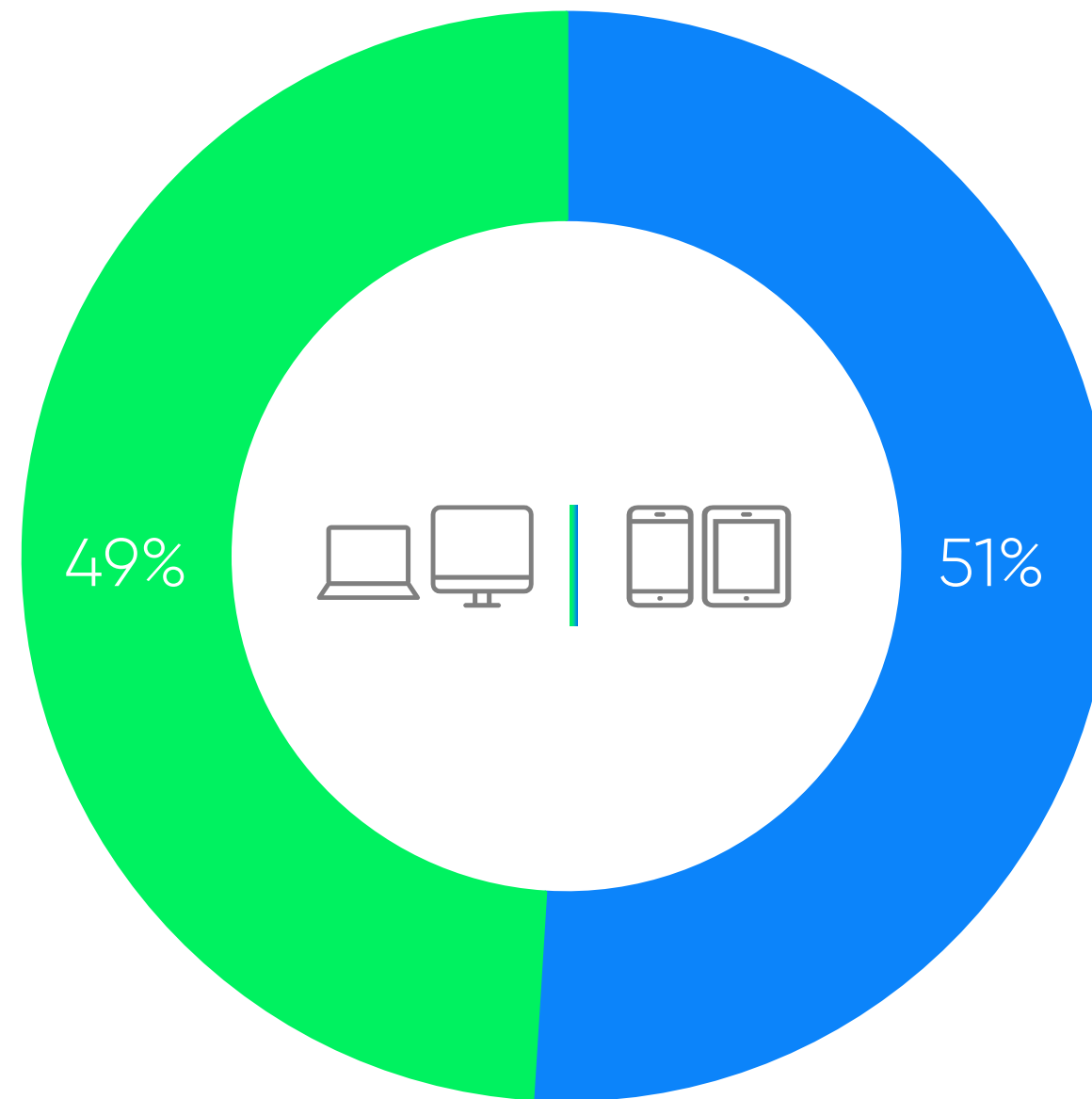
*Pick-up point - pick-up from all non-automated (with employees) pick-up points, including company stores.

Mobile Commerce





Desktop vs Mobile

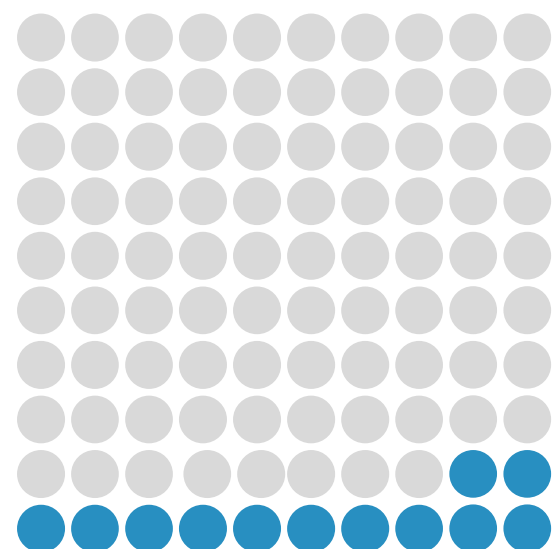


Visits to the websites of sporting goods retailers are almost equally split between desktop and smartphones/tablets.

Mobile Apps

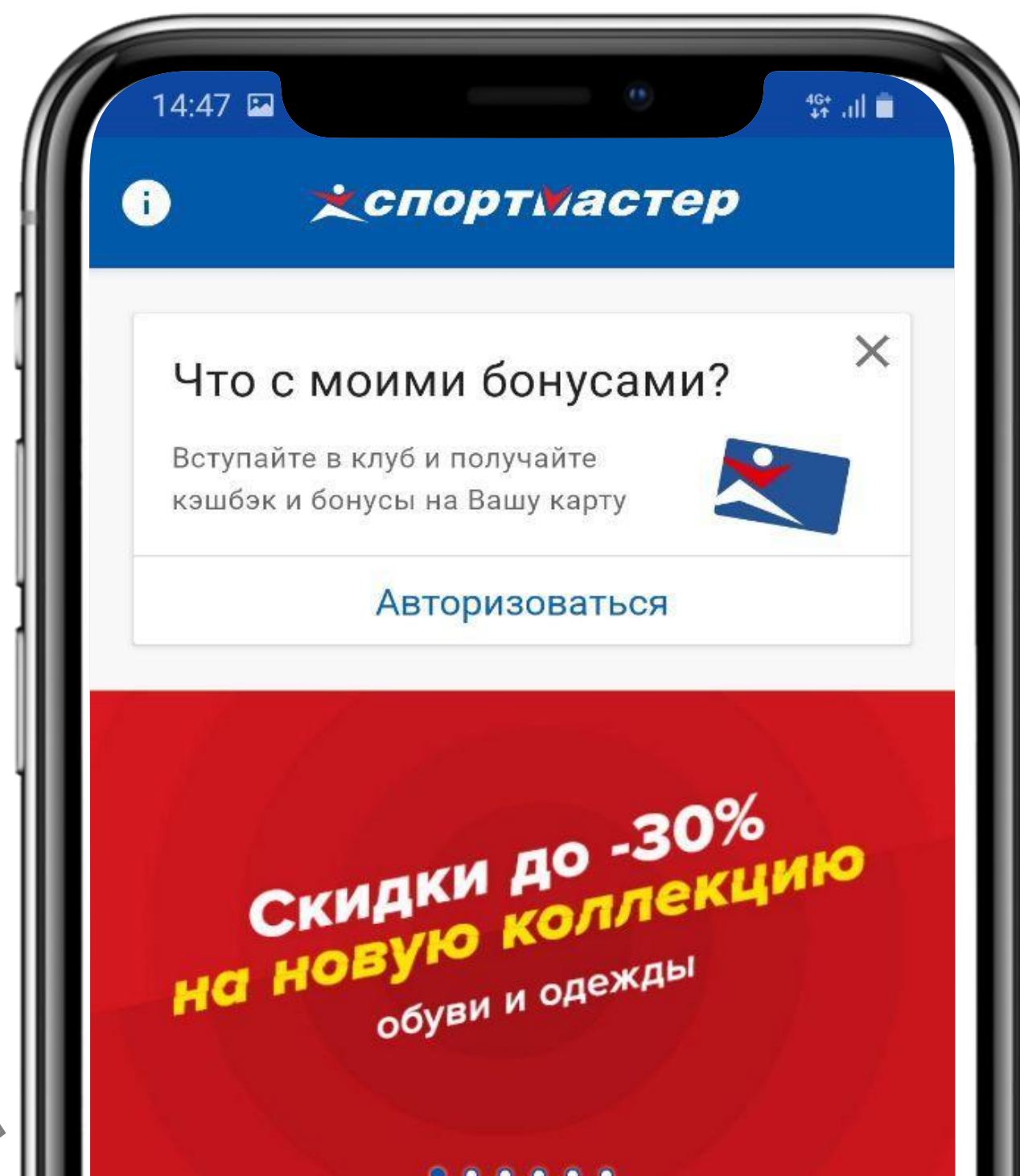
The most popular app is owned by Sportmaster.ru – more than 5 m downloads in Google Play Store.

12%

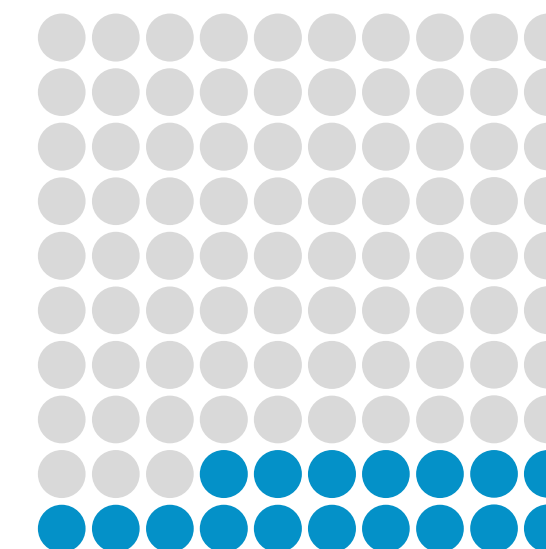


Share of sporting goods online stores with apps in the Google Play Store

Sportmaster.ru app →



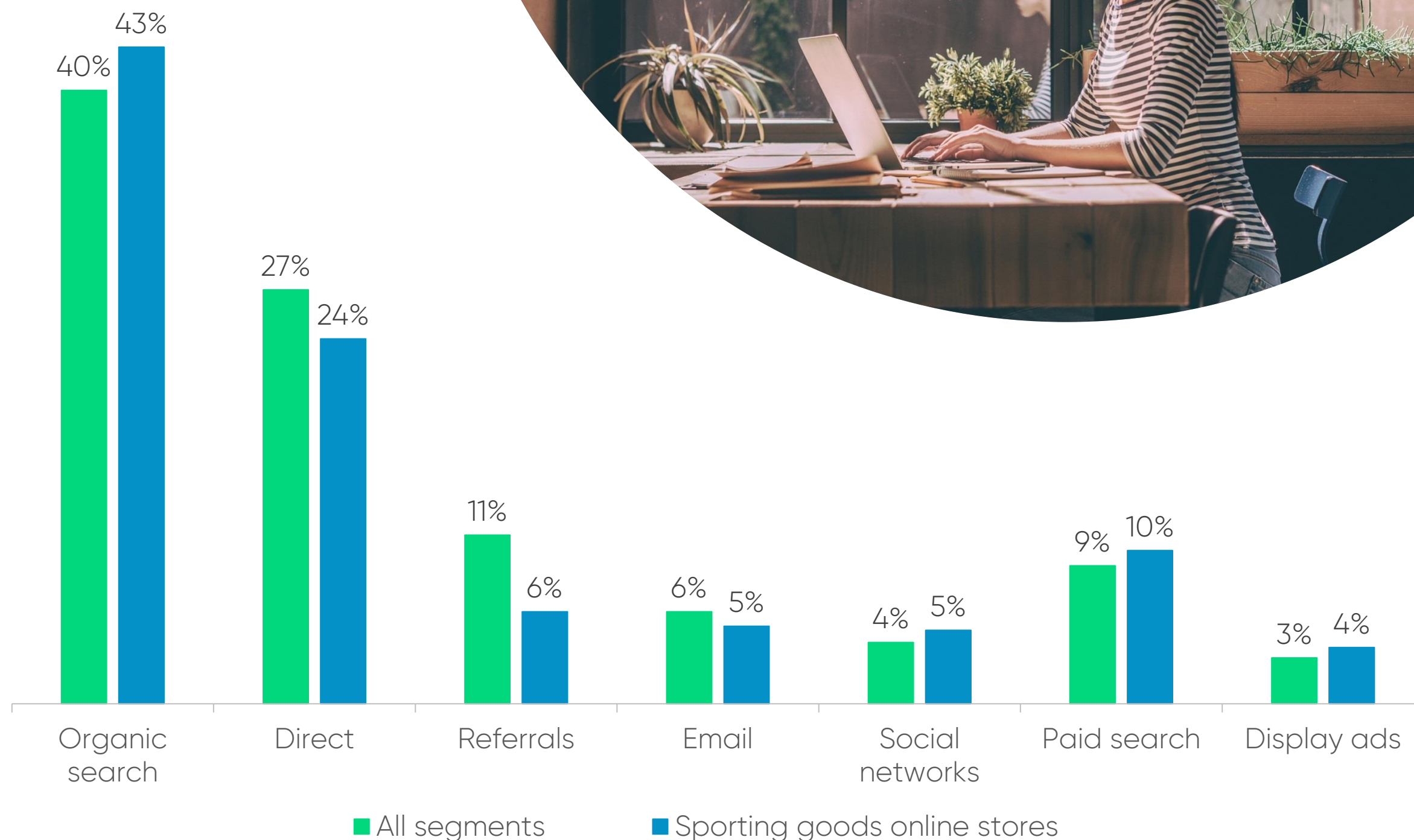
17%



Share of sporting goods online stores with apps in the iOS App Store

Customer Acquisition Channels





Share of Traffic

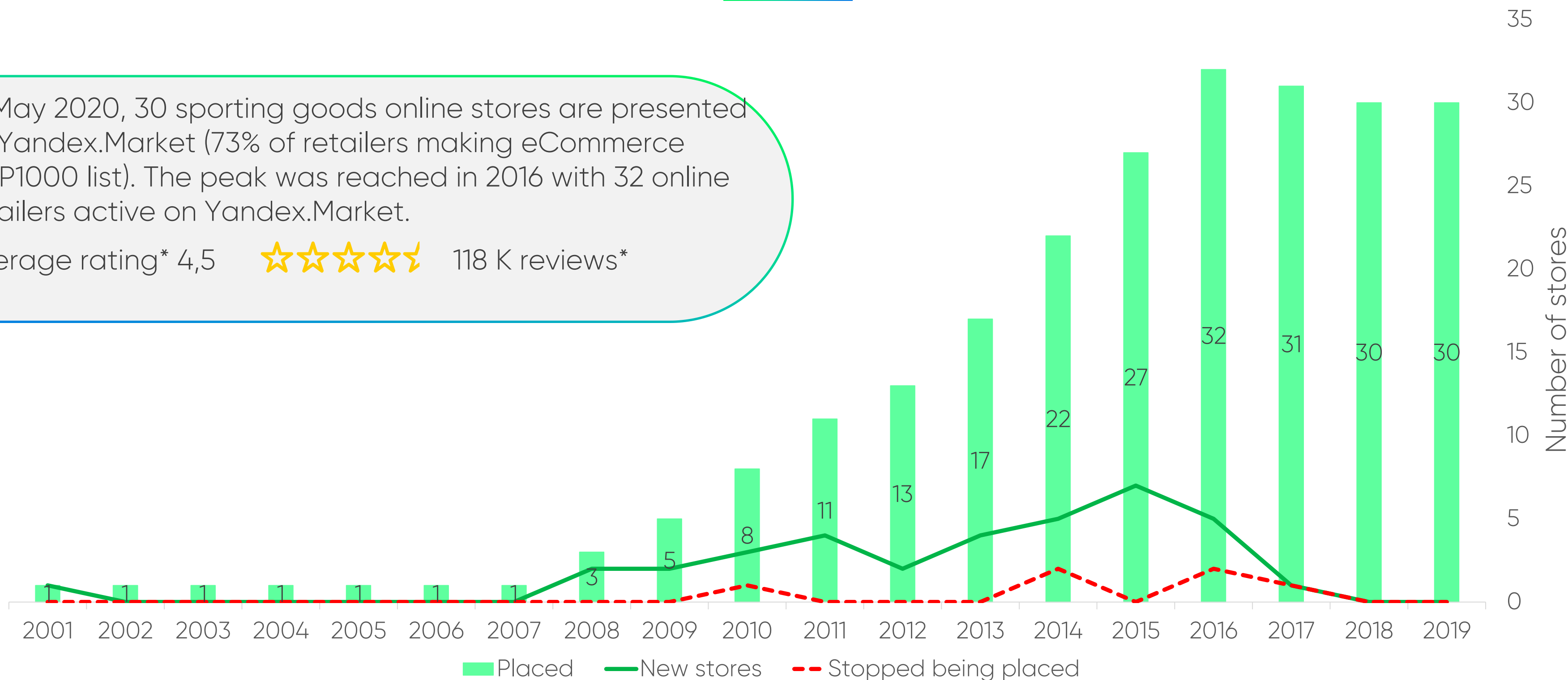
Traffic sources of sporting goods segment are similar to eCommerce average numbers, except of higher organic search values (43% against 40% for all segments) and lower direct and referrals traffic share.

According to SimilarWeb data; average figures for 41 online stores are shown without store's "weight" in general traffic of segment

Presence in the Yandex.Market

In May 2020, 30 sporting goods online stores are presented at Yandex.Market (73% of retailers making eCommerce TOP1000 list). The peak was reached in 2016 with 32 online retailers active on Yandex.Market.

Average rating* 4,5  118 K reviews*



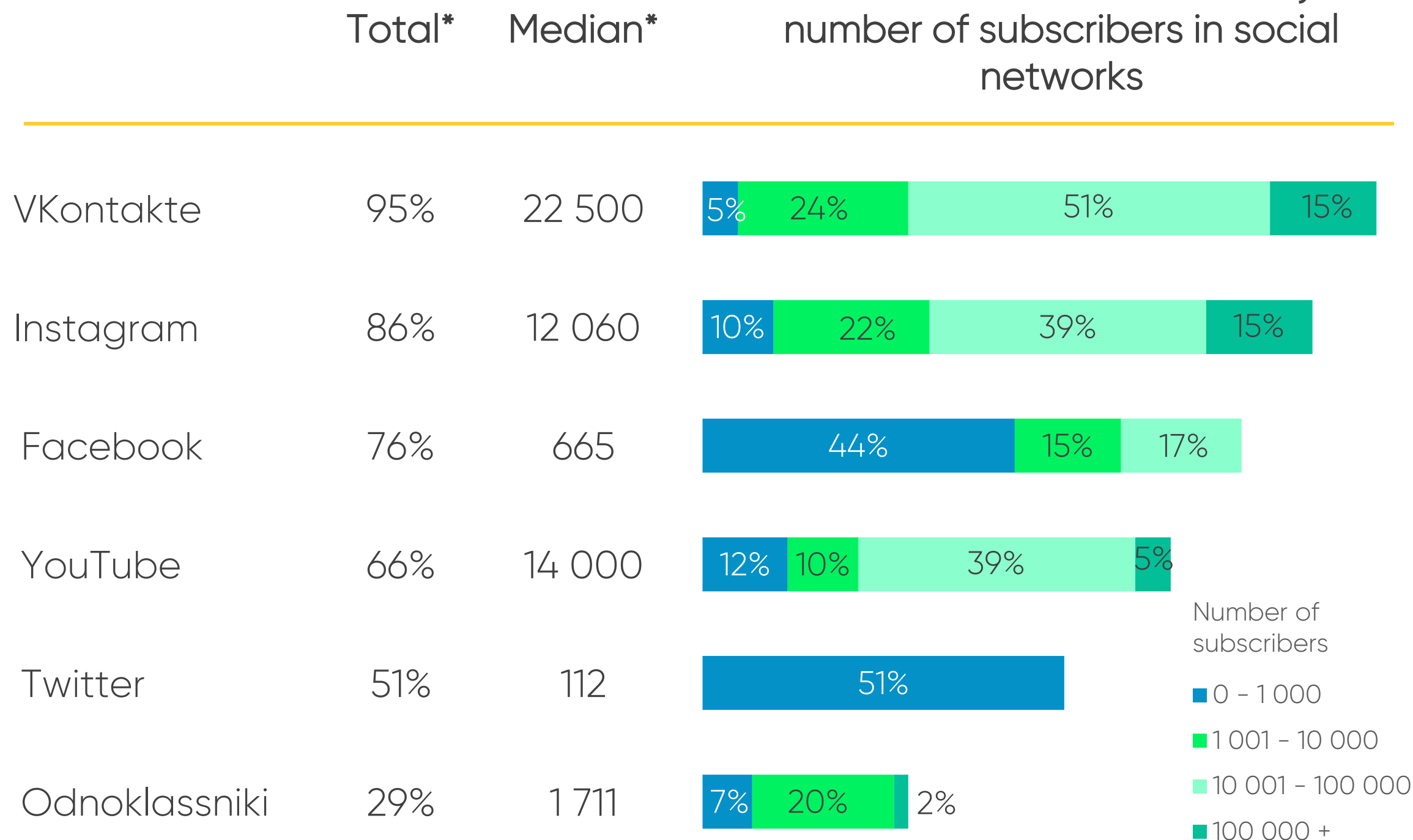
* Average rating for all reviews on Yandex.Market in May 2020

The data is calculated for 41 online retailers of sporting goods (TOP1000 participants in June 2020)

Social Networks Activity

The most popular social network for online retailers of sporting goods is VKontakte. 95% of stores have active accounts on VKontakte, 15% of these accounts have more than 100 000 subscribers.

Distribution of online retailers by the number of subscribers in social networks



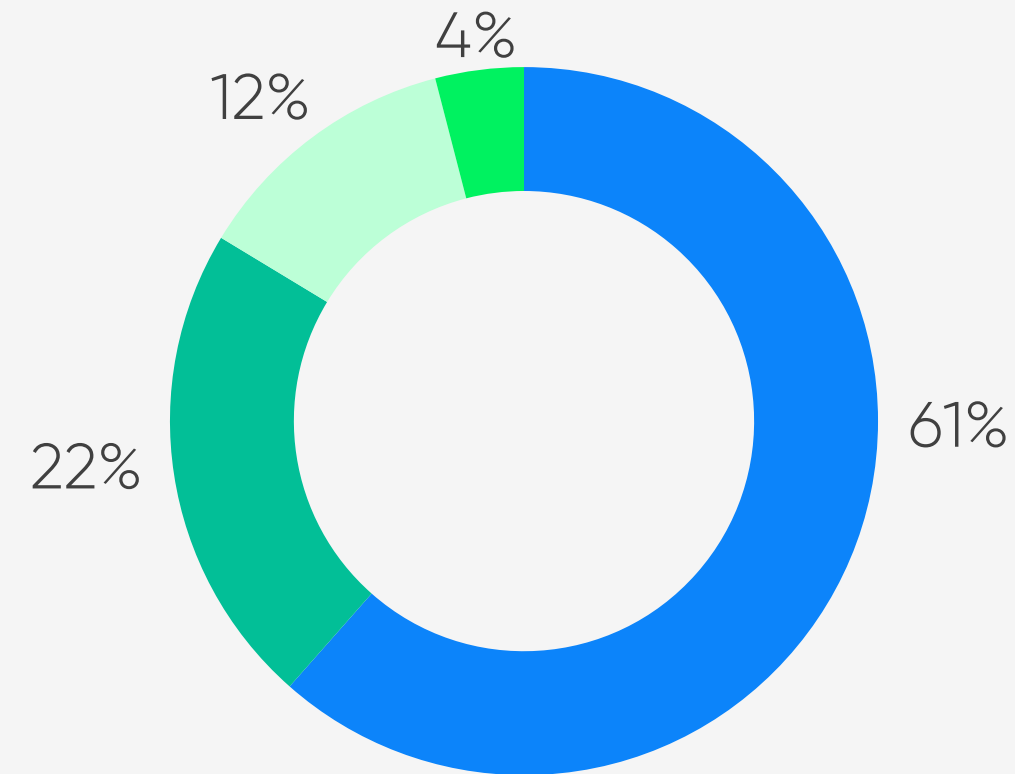
*The percentage of online stores using the respective social network and median of number of subscribers are specified



Technology



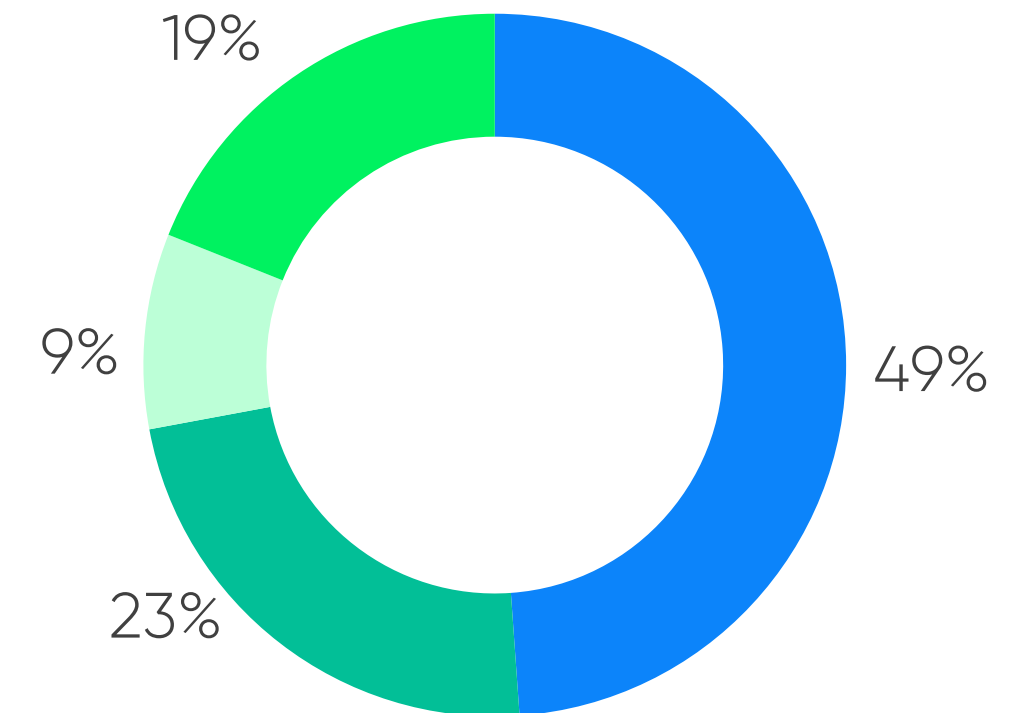
CMS



- In-house development
- Bitrix
- WordPress
- Other CMSs

61% of sporting goods online stores use in-house CMSs (Content Management System). 22% of online stores use Bitrix, 12% use WordPress and 4% - other CMSs.

Newsletter

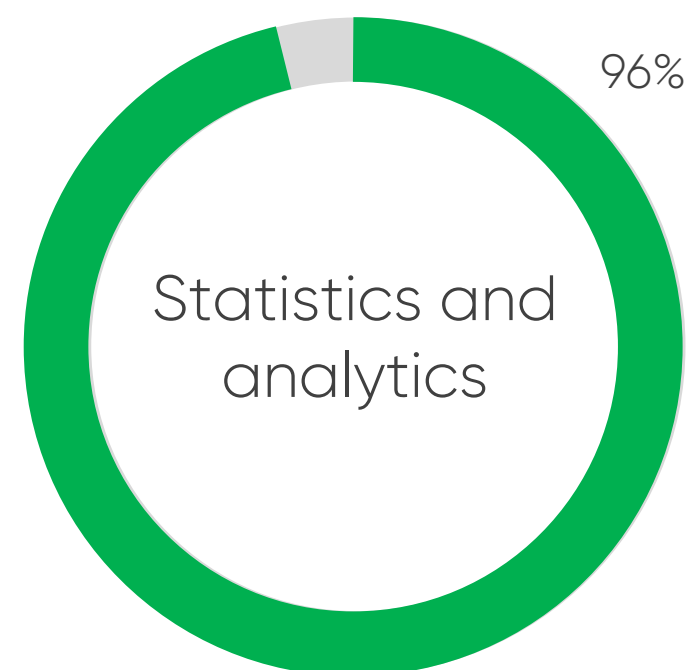


- No newsletter
- In-house development
- Mindbox
- Third-party services

49% of sporting goods online stores do not send newsletters about their special offers and promotions. 23% use in-house email-systems. 9% use Mindbox. 19% of online stores use third-party services.

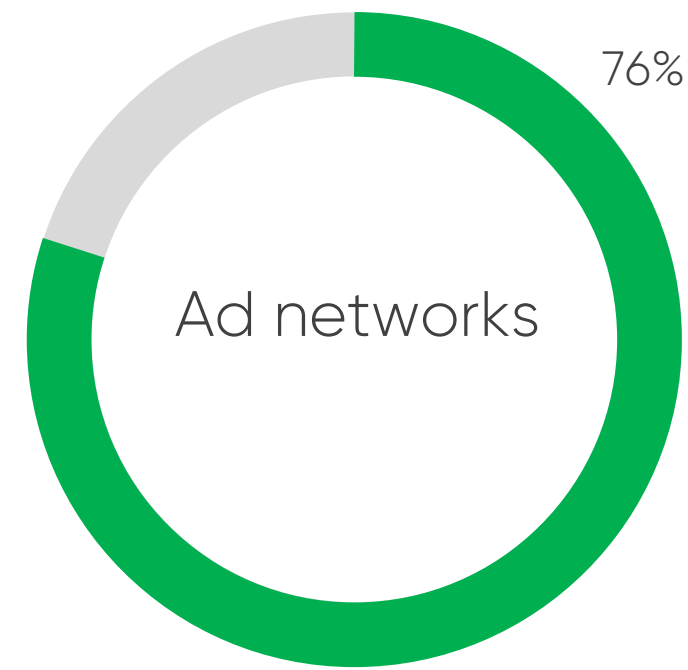
Marketing Services

Share of online stores using marketing services



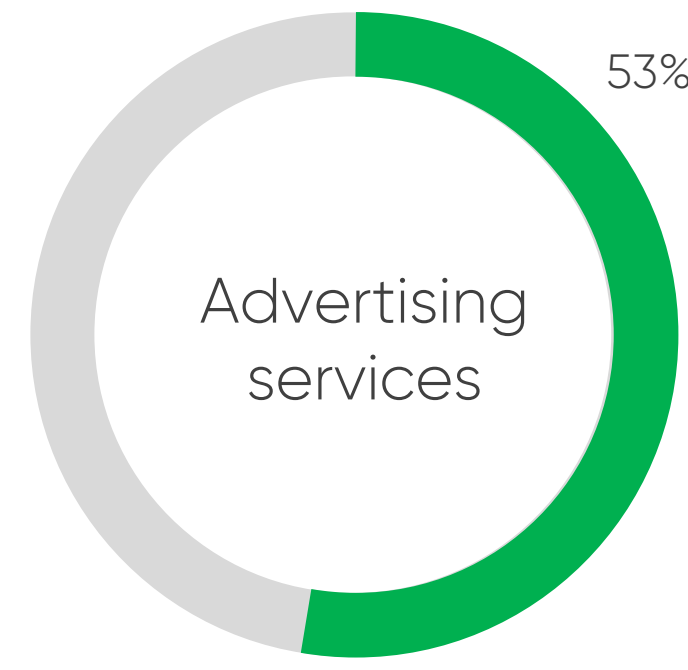
Yandex.Metrics, Google Analytics, calltrackingsystems, other services that track traffic and customers behavior on the website.

🏆 Yandex.Metrics – 89%



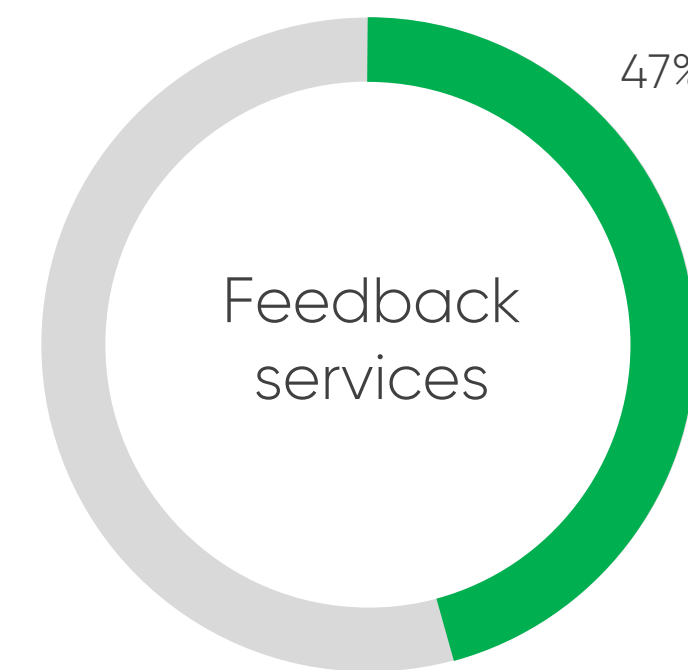
Networks for placing ads on pages of other ad network participants.

🏆 DoubleClick (Google Display&Video 360) – 62%



Advertising management and personalization services.

🏆 Facebook Custom Audiences – 44%



Online and email communication, callback services.

🏆 JivoSite – 33%



News

News in Russia 2019

January	Yandex.Market: Demand for Winter Sports and Activities Equipment
March	Decathlon Delivers to Boxberry Pick-up Points
May	Sports.ru Launch Ad Platform for Sports Brands with Bloggers
July	Yandex.Market Presented Research about the Most Popular Summer Means of Transport
August	Rakamakafit Case: How to Create Sporting Goods Online Store with Instagram
September	Healthy Lifestyle Goods Became More Popular among Online Customers Sportmaster Purchased Polish Sporting Goods Retail Chain Go Sport
November	Sporting Goods is one of the Most Popular Categories in Sales Day on Ozon
December	«Nothern Caucasus Resorts» Deals with Fischer and Kant to Promote Mountain Vacation

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World News 2019

- January [Bike 3.0 Era: Impact of Internet and Shifting Market Strategies](#)
[9 Rules for Selling Outdoor Goods Online](#)
- May [Dick's Sporting Goods eCommerce Sales increased 15% for the 2019 1st Quarter](#)
- August Multi-Channel Pilot in Paris: [Zalando Delivers Same-Day for adidas.fr](#)
[Nike Acquires A.I. Platform Celect to Better Predict Shopping Behavior](#)
- September [Amazon and Puma Launch Exclusive Clothing Brand](#) for Selling Online
- October [How Sports Customers Shop in 2019: ISPO Analytics](#)

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- ✓ TOP10 by the **revenue**
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- ✓ **Technologies** for TOP10
(CMS, email, marketing services)
- ✓ **Mobile traffic** share in TOP10
- ✓ **Mobile apps** overview
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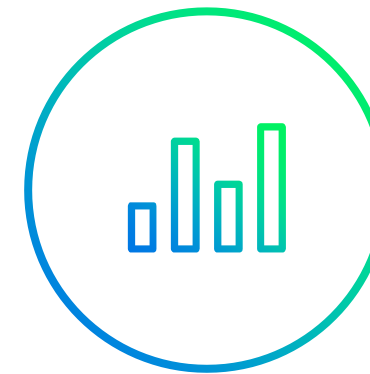
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