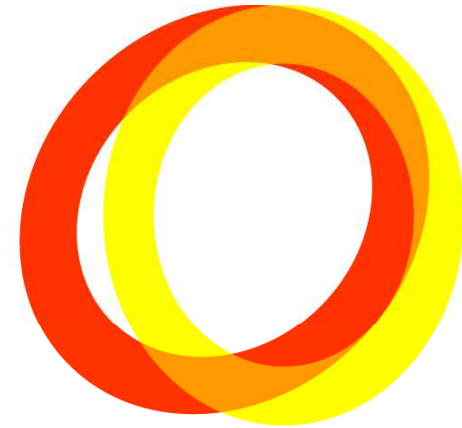


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CONSUMER PREFERENCES ON RUSSIAN FURNITURE MARKET

ACCORDING TO THE SURVEY
RUSSIAN TARGET GROUP INDEX

Russian furniture sammit
23-24 June 2011

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**Russian Target Group Index:
integrated approach to data analysis**

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Consumer preferences

Russian Target Group Index

Russian Target Group Index is a nationwide consumer research

- ~ 400 categories
- ~ 3000 brands
- ~ 300 statements about lifestyle

Is held since 1995

Target Group

The Russians of 10 years old and older

Geography

50 Russian cities with population of more than 100 000 people

Frequency

Quarterly

Annual sample

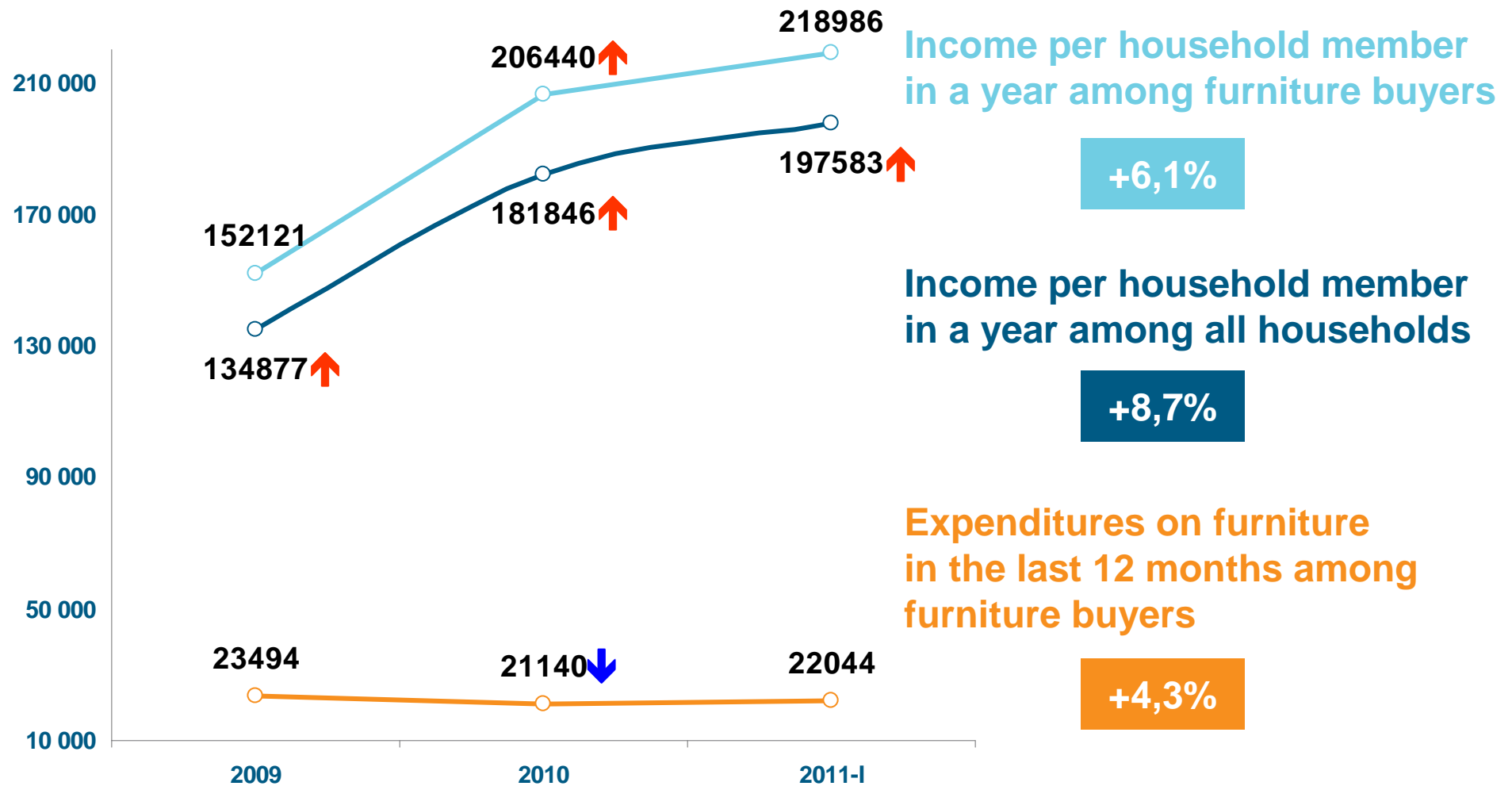
28 000 respondents (14 000 households)

Integrated approach to data analysis



CURRENT MARKET CONDITIONS

Ratio of income of the Russians and their expenditures on furniture



Regional category penetration

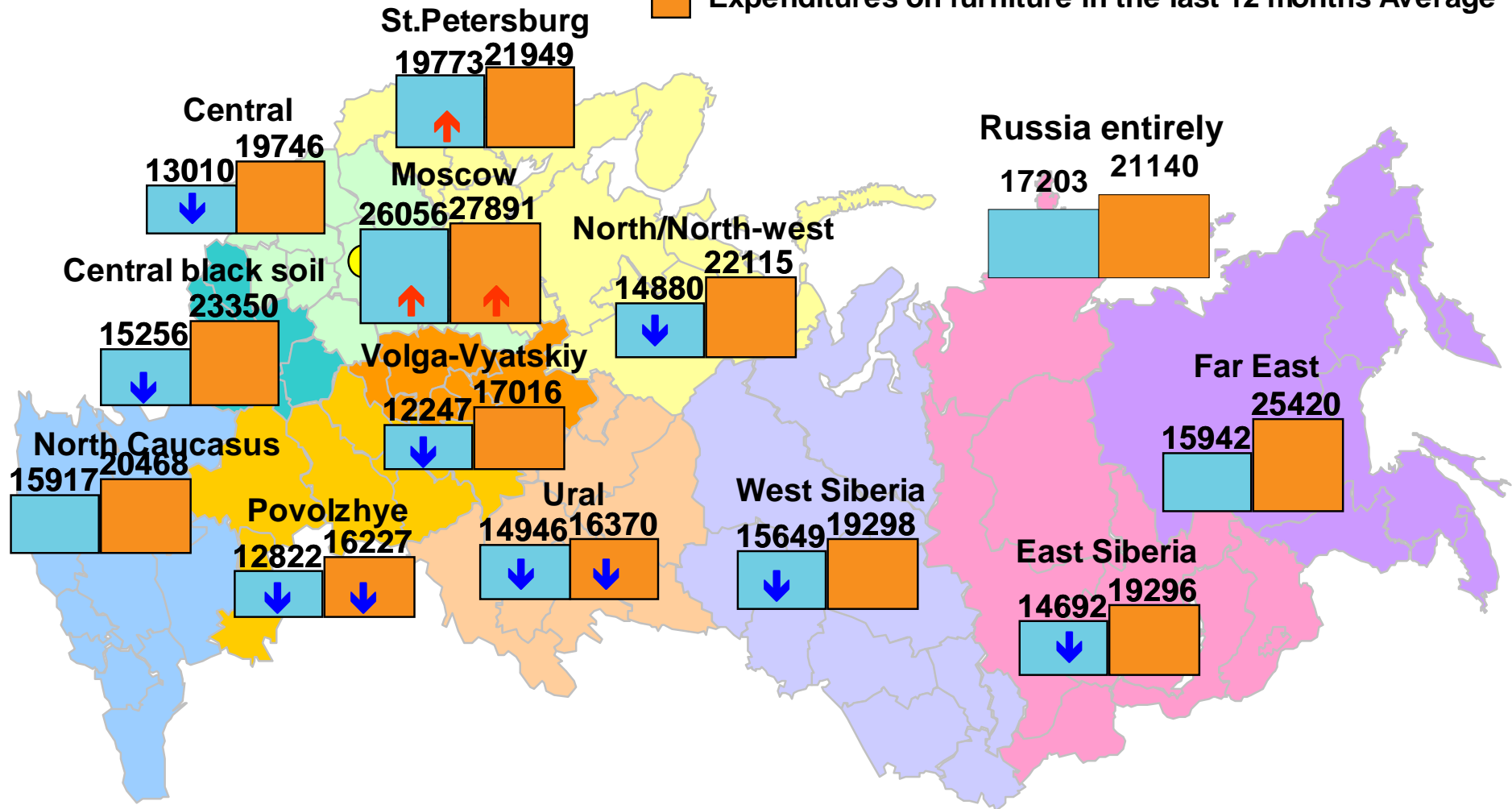
Bought furniture in the last 12 months, %

Russia entirely – 26%



Regional differences in expenditures on furniture

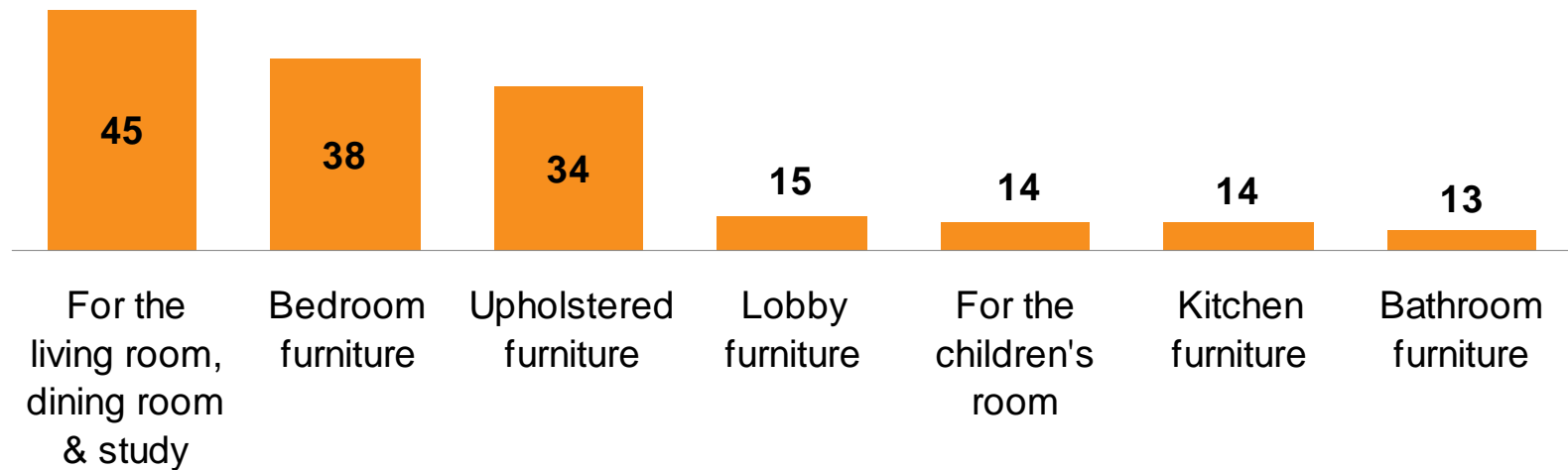
Income per household member Average
Expenditures on furniture in the last 12 months Average



Significantly higher/lower than in Russia entirely

Base: Russia, 2010, households, bought furniture in the last 12 months

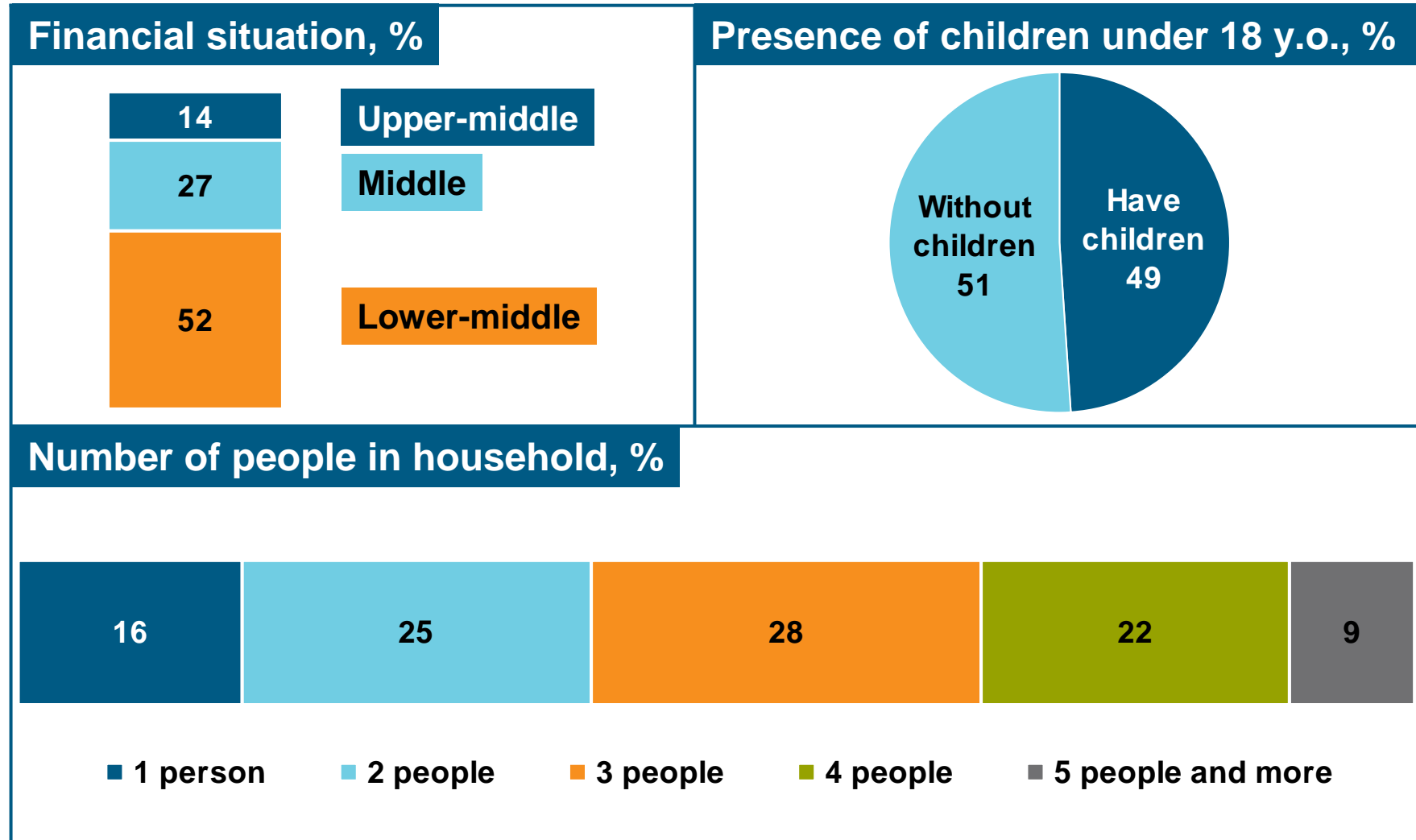
Purchase of furniture categories, %



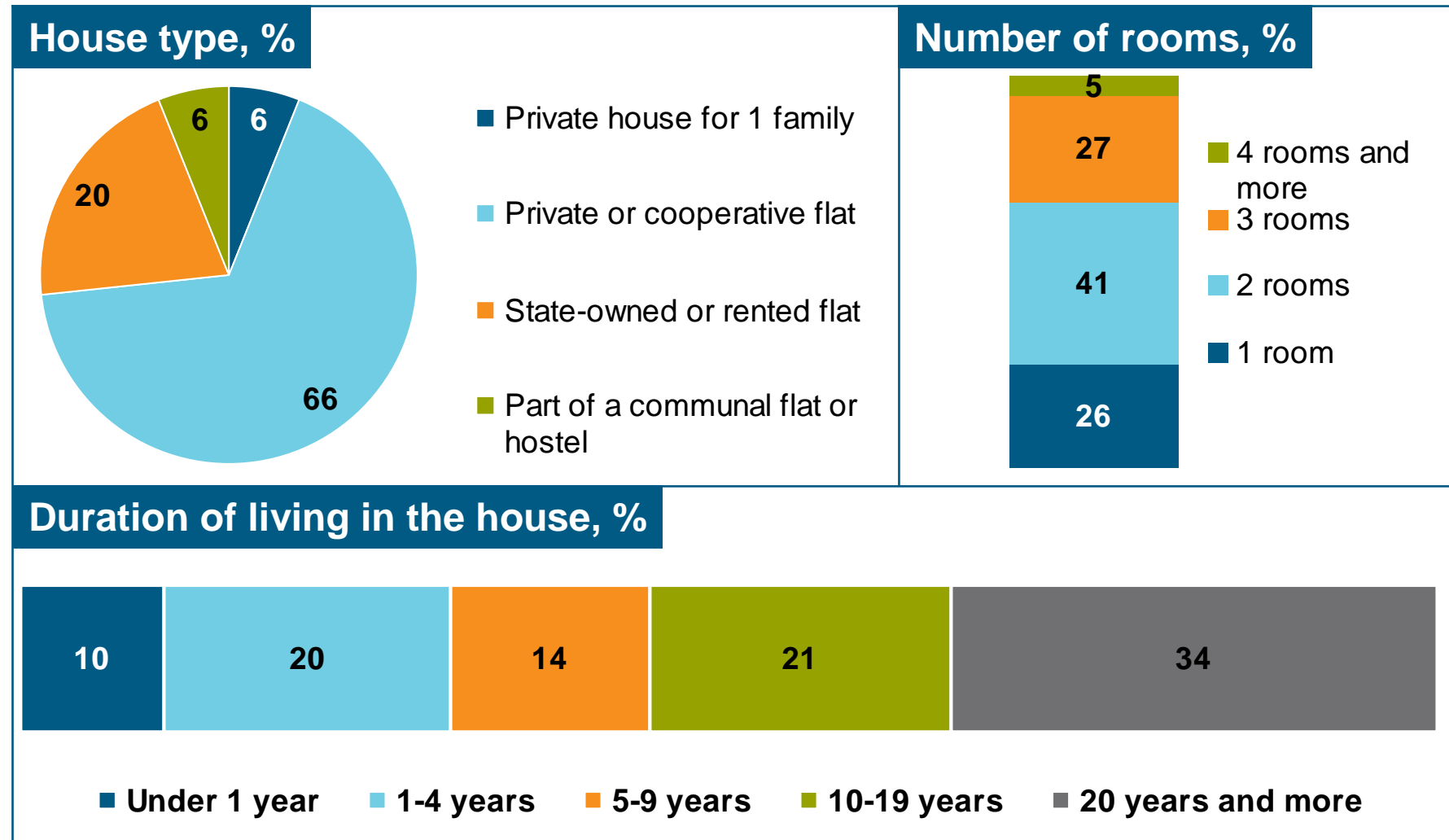
	Living room	Bedroom	Upholstered	Lobby	Children's	Kitchen	Bathroom
Living room	100	44	38	48	37	48	49
Bedroom	36	100	31	41	36	38	46
Upholstered	28	27	100	41	25	39	39
Lobby	16	16	18	100	15	31	37
Children's	12	14	11	14	100	15	13
Kitchen	14	14	16	28	14	100	33
Bathroom	14	16	15	31	12	32	100

THE PORTRAIT OF RUSSIAN FURNITURE BUYER

Socio-demographic characteristics of furniture buyers (1)



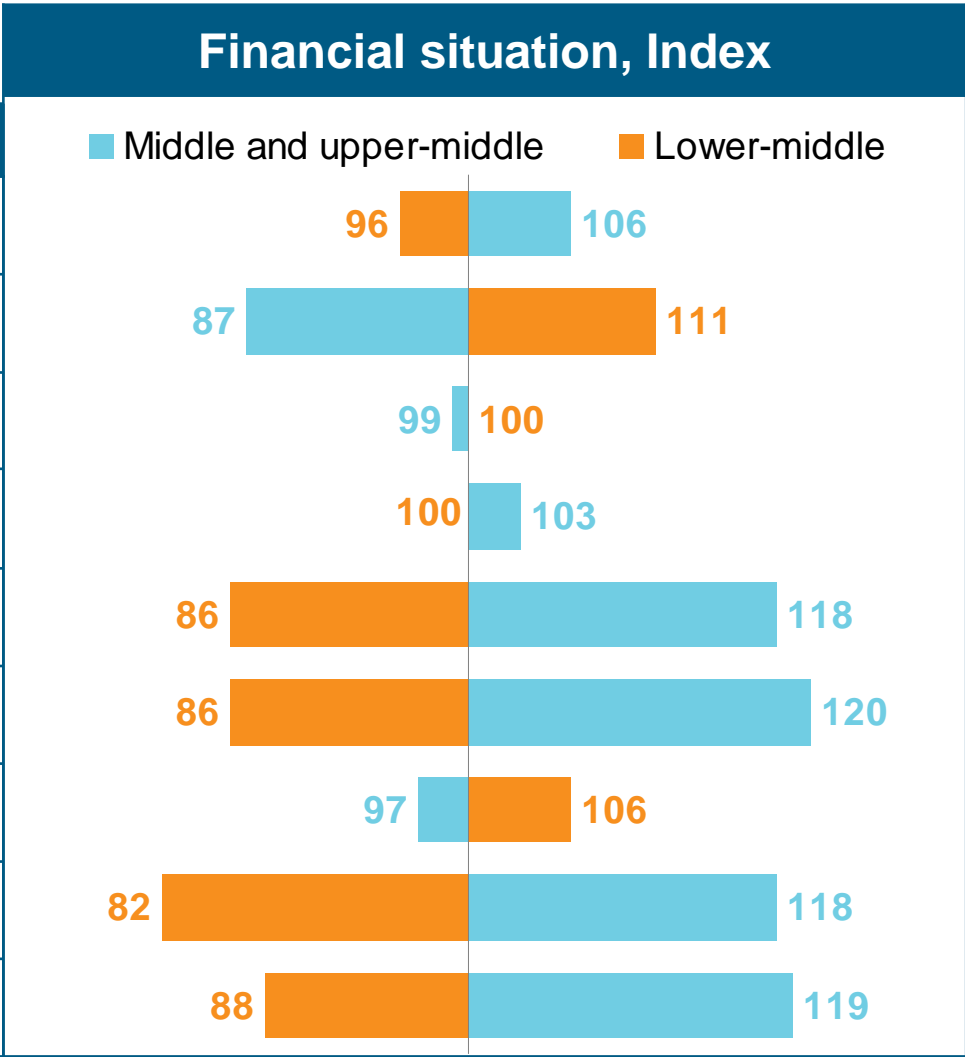
Socio-demographic characteristics of furniture buyers (2)



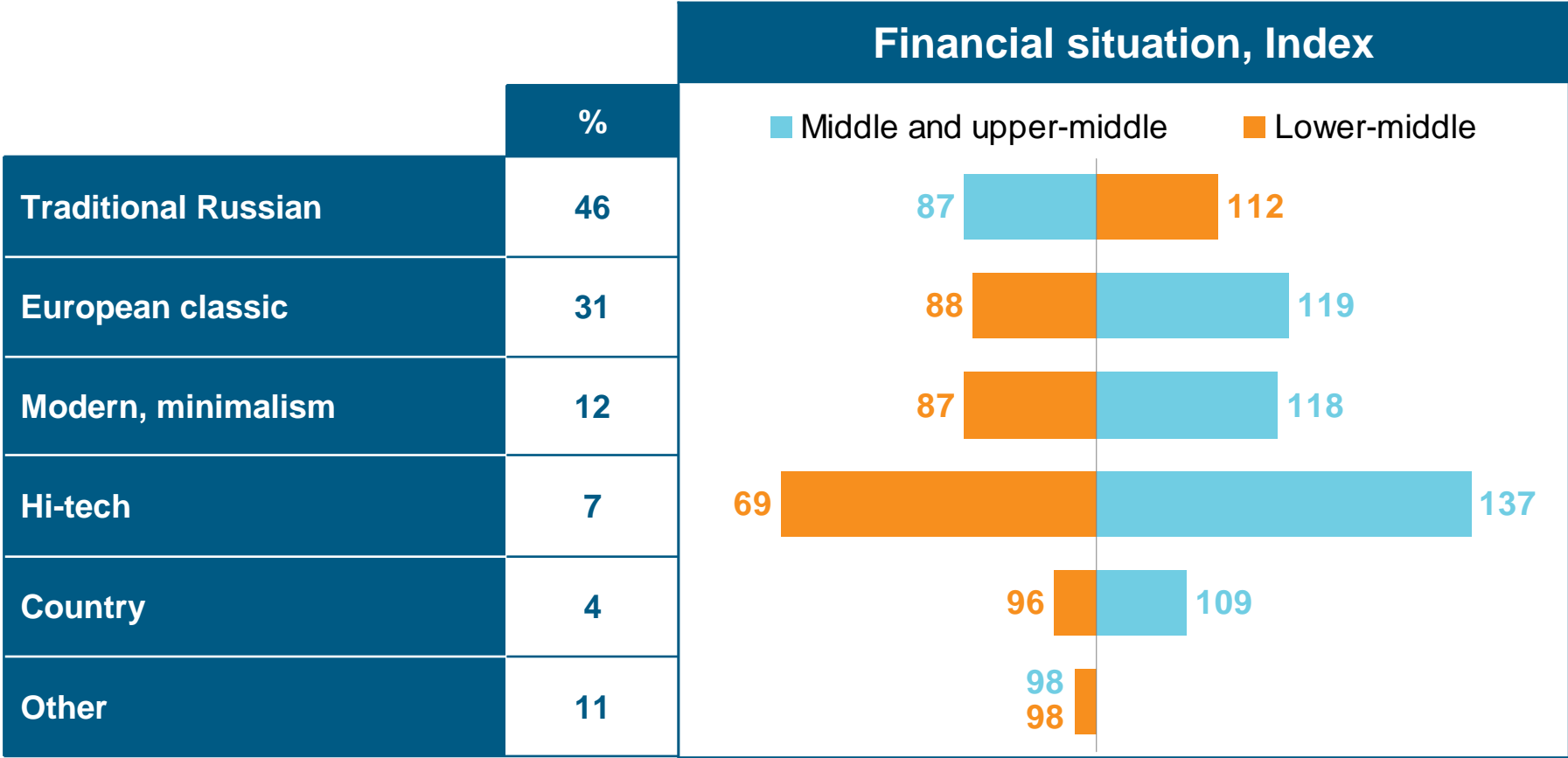
CONSUMER PREFERENCES

Furniture choice factors

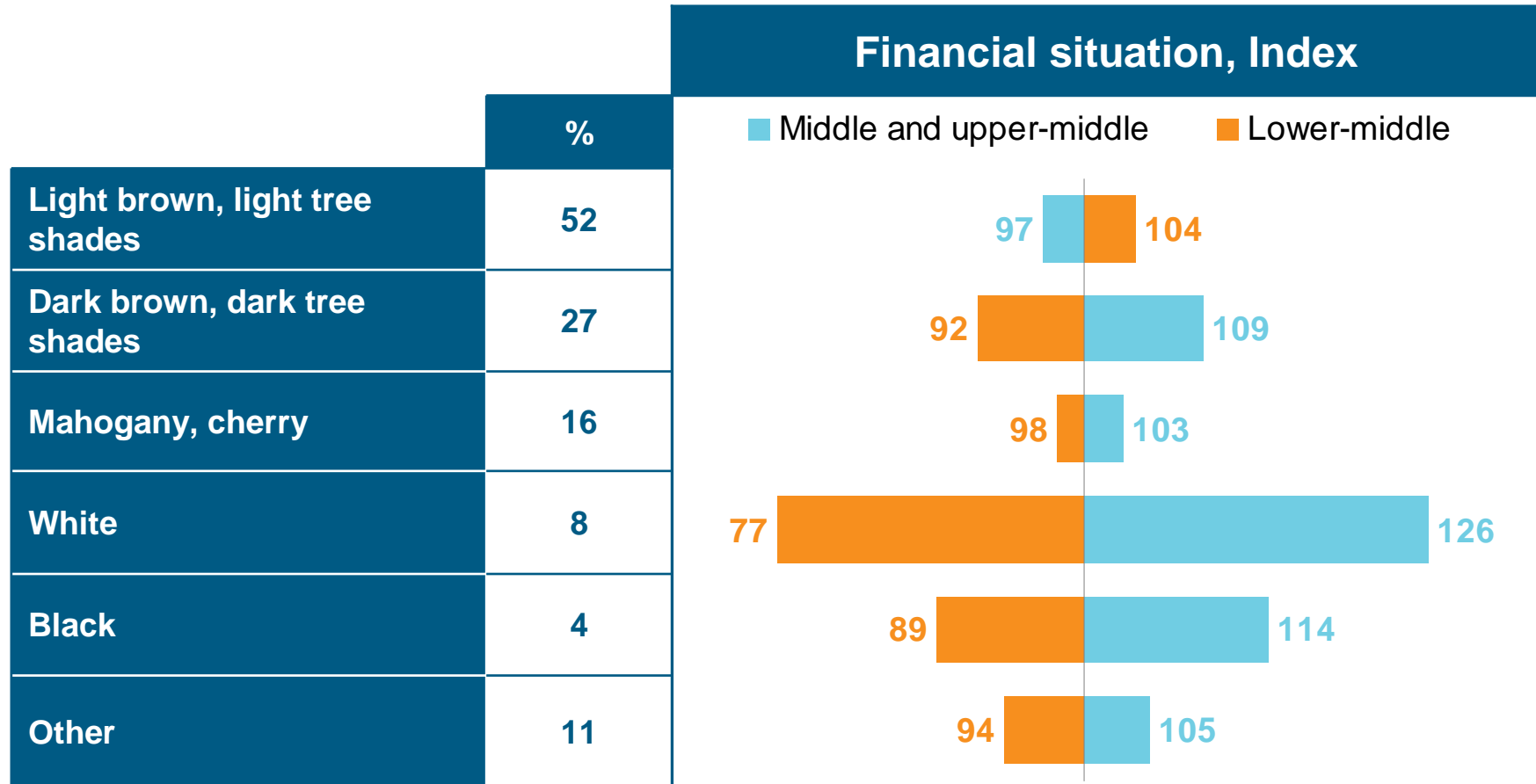
	%
Design, appearance	66
Acceptable price	52
Reliability, durability	46
Easy to use	30
Fit with the style of other things in the interior	21
Natural material	21
Color	13
Brand, manufacturer	7
Country of manufacture	4



Style of furniture preferred

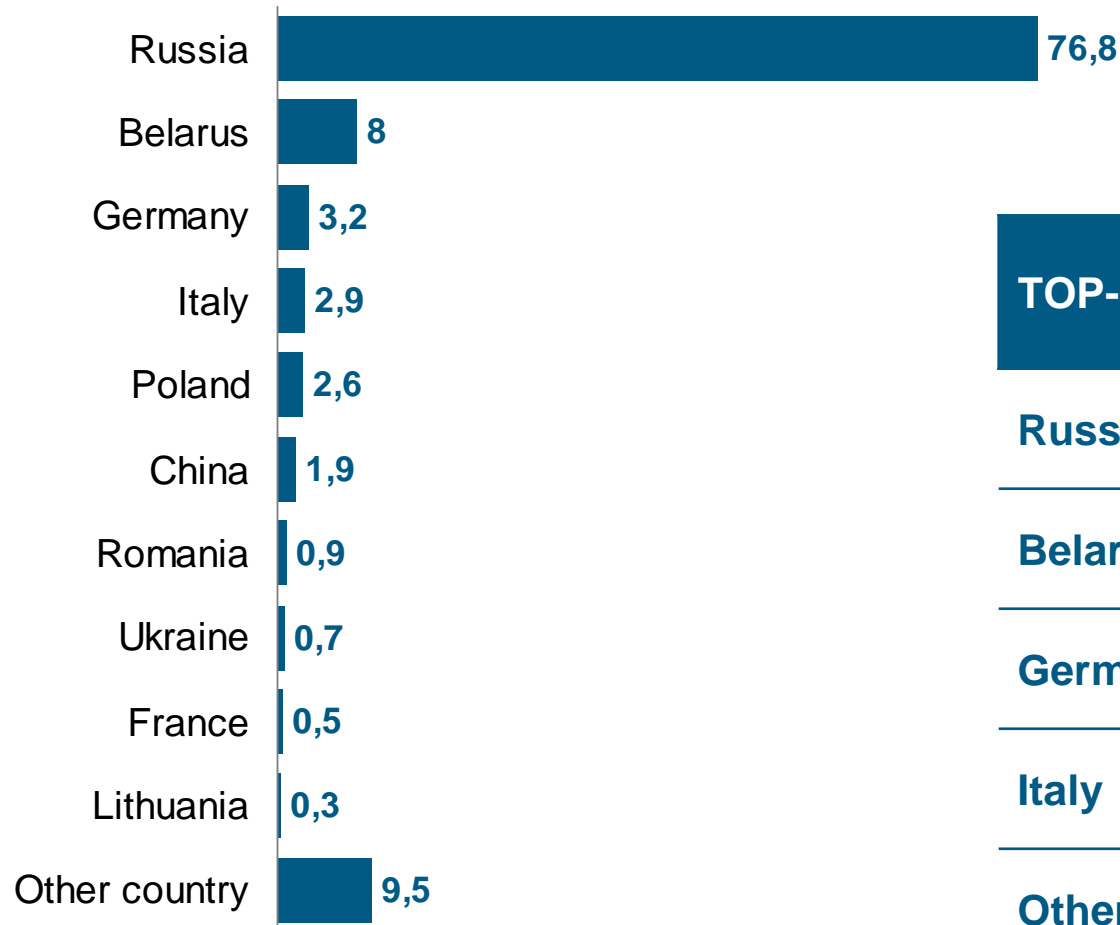


Color of furniture preferred



Country of origin

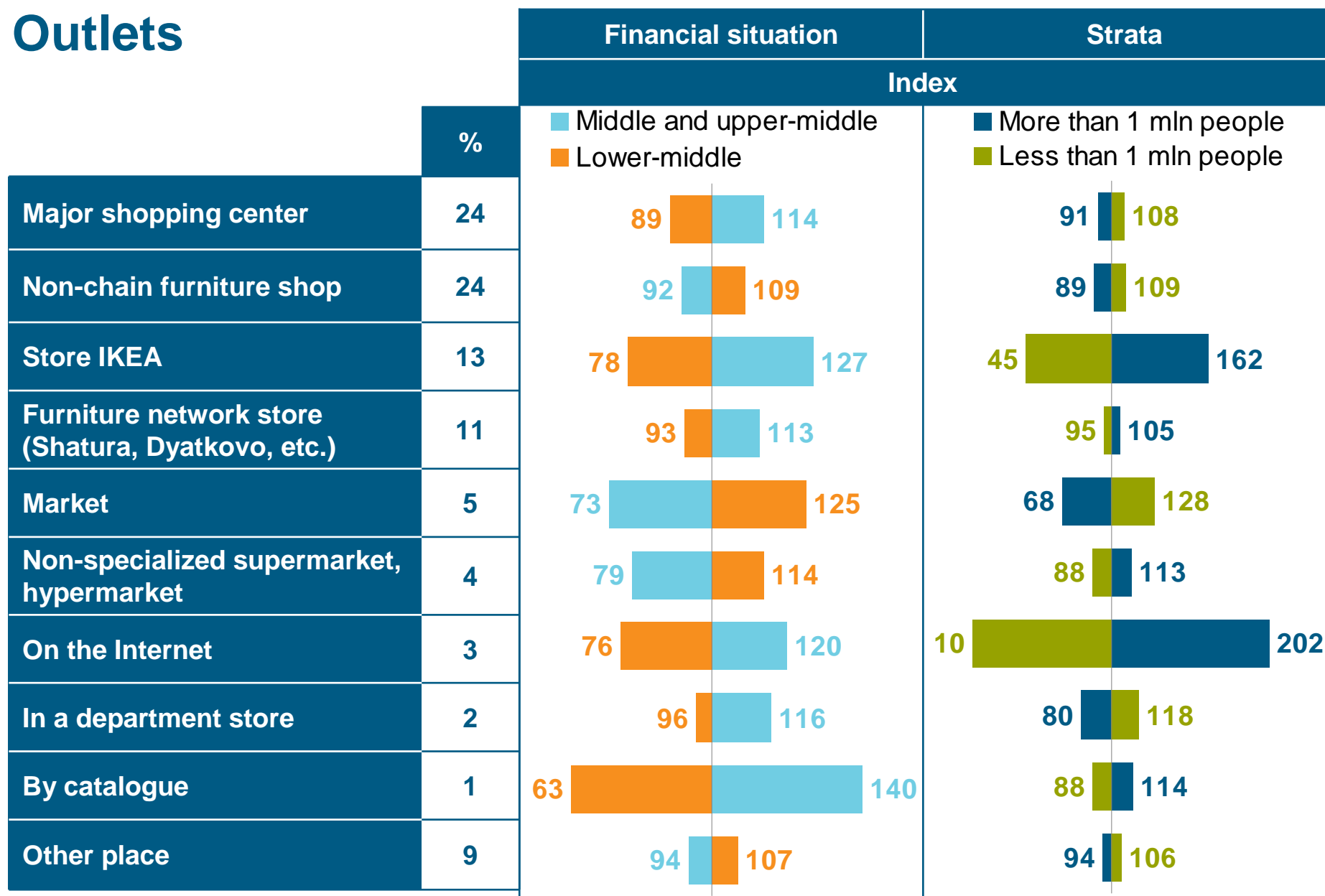
Cabinets furniture



Financial situation, %

TOP-5	Middle & upper-middle	Lower-middle
Russia	73,8	80,0
Belarus	8,1	7,8
Germany	3,9	2,7
Italy	4,7	1,5
Other country	10,2	8,3

Outlets





We will be glad to answer your questions!

Best regards,

Evgeniya Philippova
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