



Smart buyers of Smart TVs in Russia

TV industry insights based on Google data

Summary

1. 84% of Russian Internet users use online for researching before purchasing TV sets. Three quarters of them claimed search engine was used during research.
2. Winter is high season in this industry. Starting from Q3'15 there are more searches from smartphones than from desktops.
3. Users usually consider 2-3 brands. Samsung, LG and Sony are most popular OEMs in 2015 and people often compare them.
4. If people don't know the brand they are looking for they are more likely to search for specific type of TV (LED, Curved etc.) or for a specific size of TV. Only 2% of generic TV searches are about high-end TVs like OLED, SUHD, UHD. 32- and 55- inch TVs are most popular ones
5. On YouTube russian users are looking for 3 types of TV-related content:
 - a. "how-to" videos like "how to connect smartphone to a TV"
 - b. simple generic searches like "TV", "smart TV", "UHD" etc
 - c. reviews on specific TV models

95% of TV buyers research before purchasing



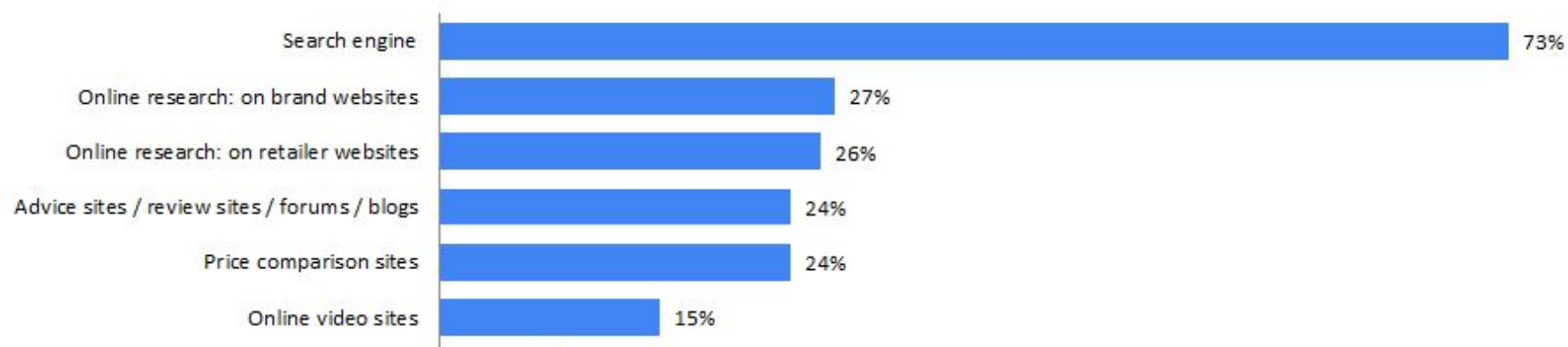
84% of Internet users use online for a TV research

What online or offline research did people do prior to their recent purchase of TV?



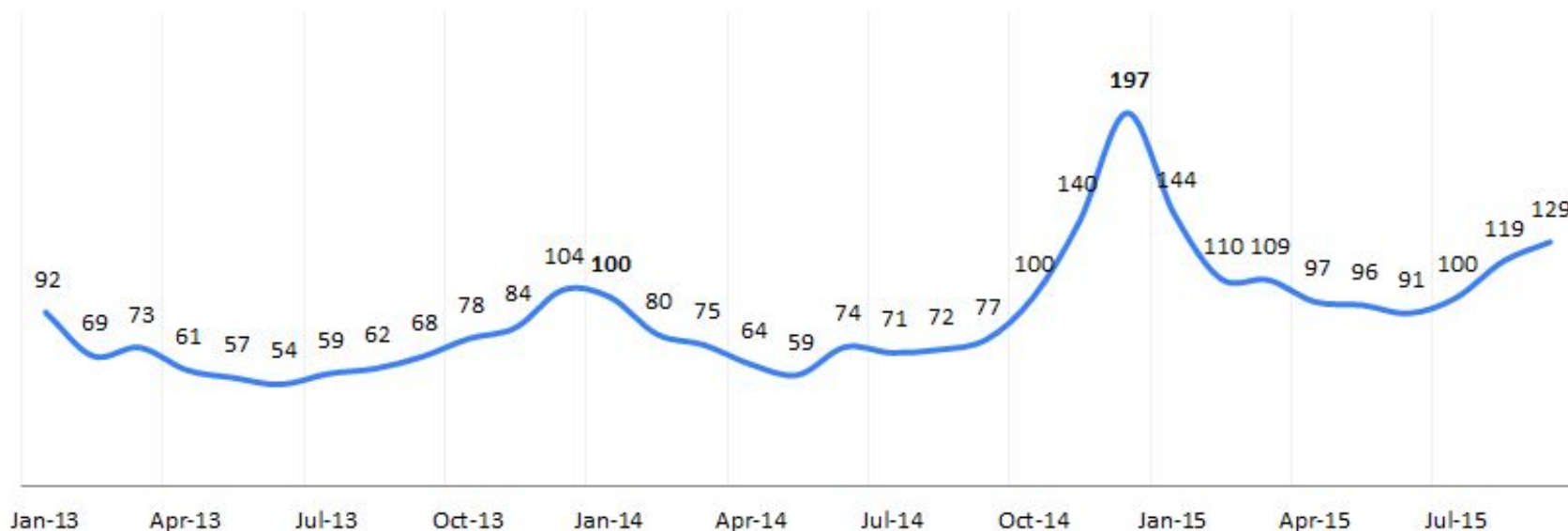
Search engine is core online source for TV researches

What online sources did people use to make a purchase decision?



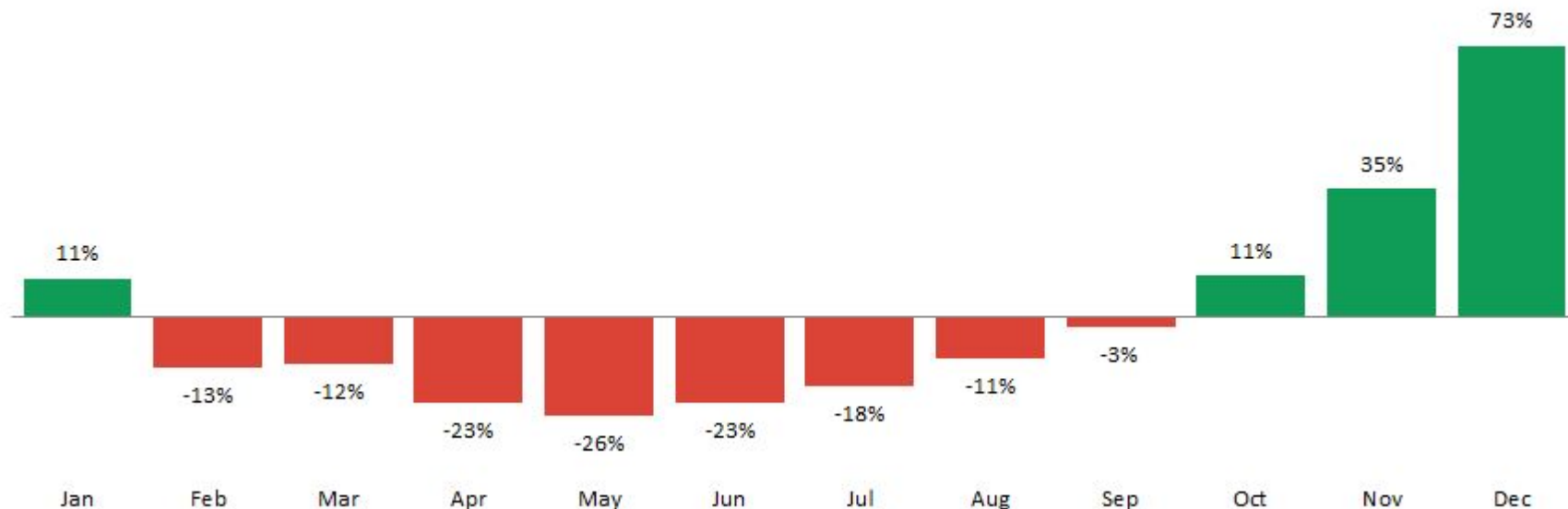
Interest to TV category grows by 40-50% every year. Last december category grew twice compared to Dec'13

Monthly dynamics of TV-related queries, %, 100% = number of queries in Jan'14



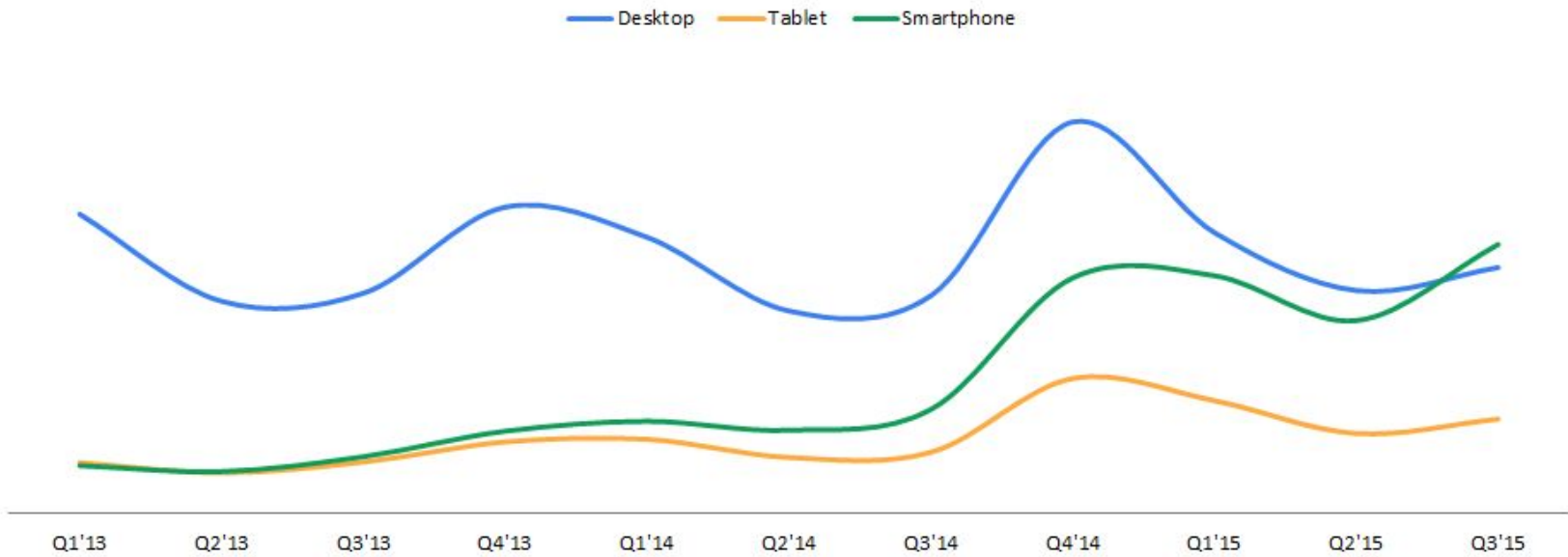
Oct-Jan is high-season in category: great opportunity to leverage with campaigns

Average monthly seasonality of TV-related queries,
0% = seasonality on “average” month



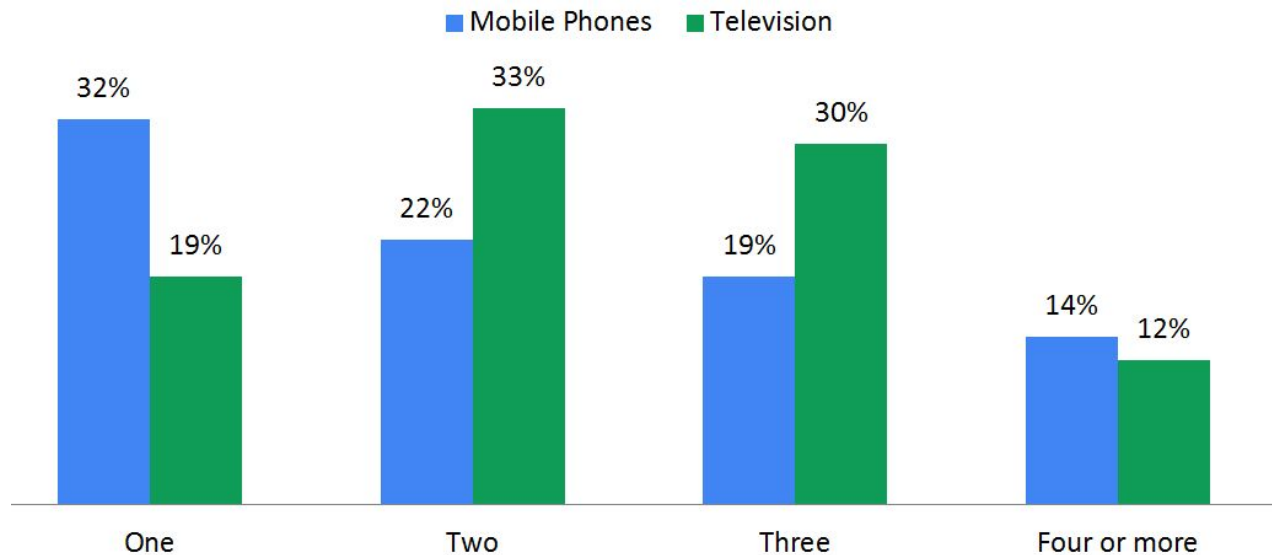
In Q3'15 people started to search for TVs from their smartphones more often than from desktops

Quarterly dynamics of TV-related queries by devices,
Q1'2013-Q3'2015

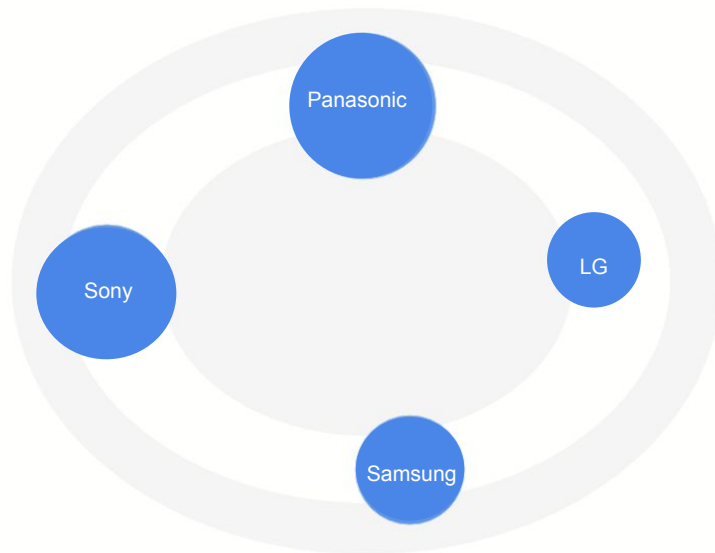


People consider 2-3 brands on average while researching for TV

How many brands did people consider before product purchase?

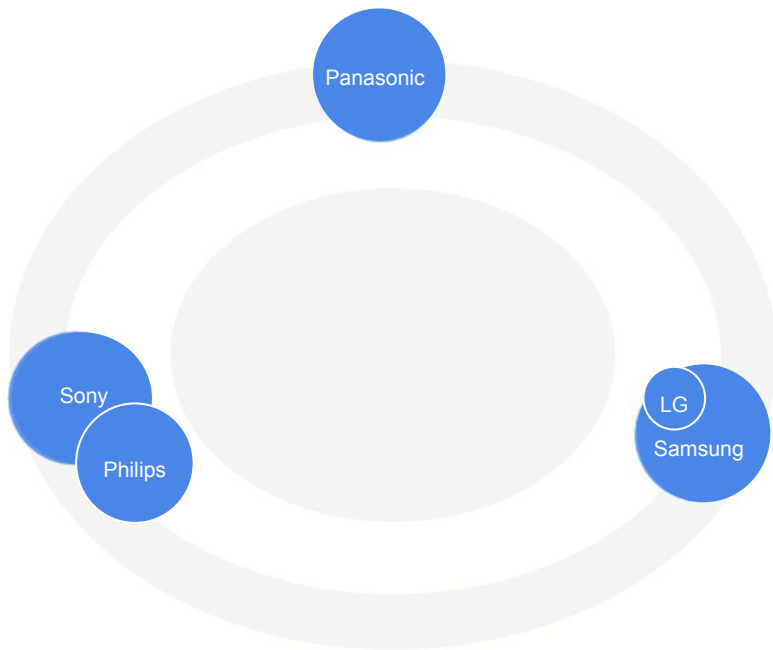


Volume of branded TV-related searches & probability of co-searches, 2006



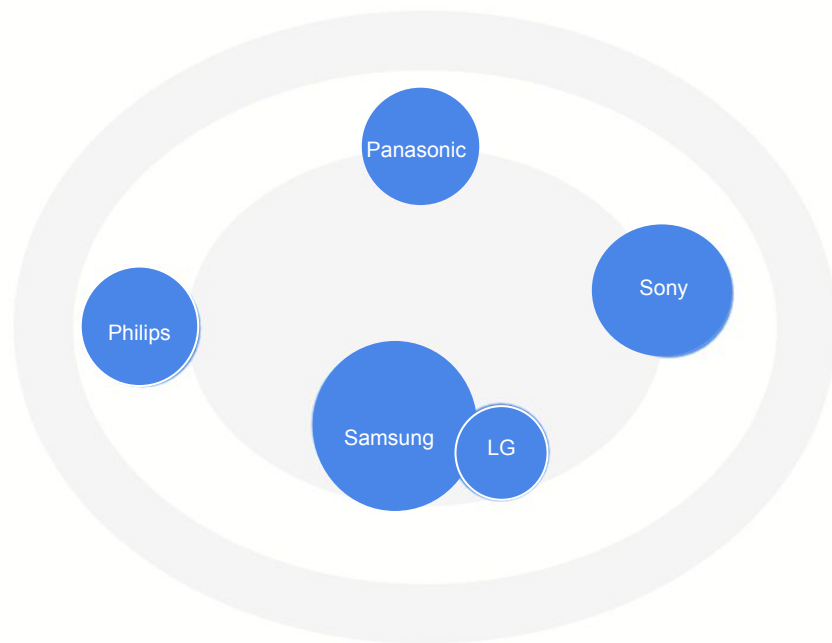
The closer 2 bubbles are the more likely that 2 TV brands were searched during same session

Volume of branded TV-related searches & probability of co-searches, 2008



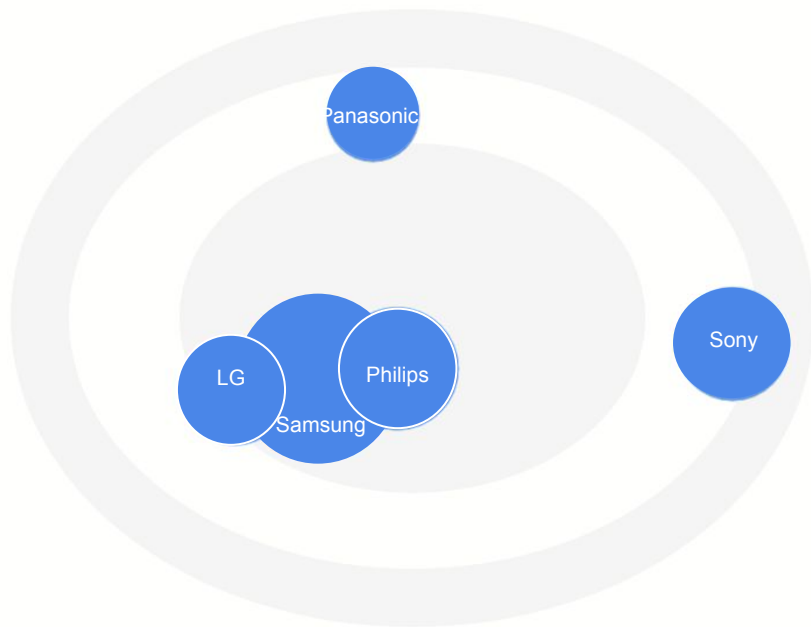
The closer 2 bubbles are the more likely that 2 TV brands were searched during same session

Volume of branded TV-related searches & probability of co-searches, 2011



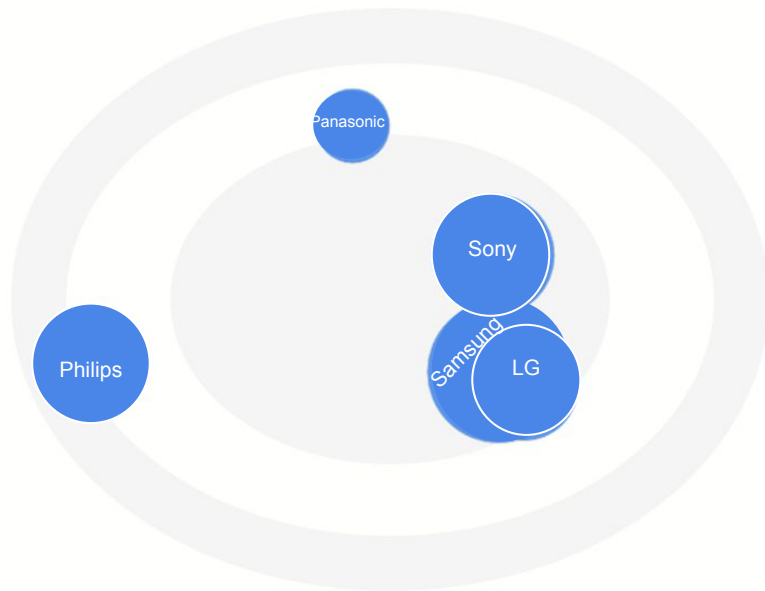
The closer 2 bubbles are the more likely that 2 TV brands were searched during same session

Volume of branded TV-related searches & probability of co-searches, 2013



The closer 2 bubbles are the more likely that 2 TV brands were searched during same session

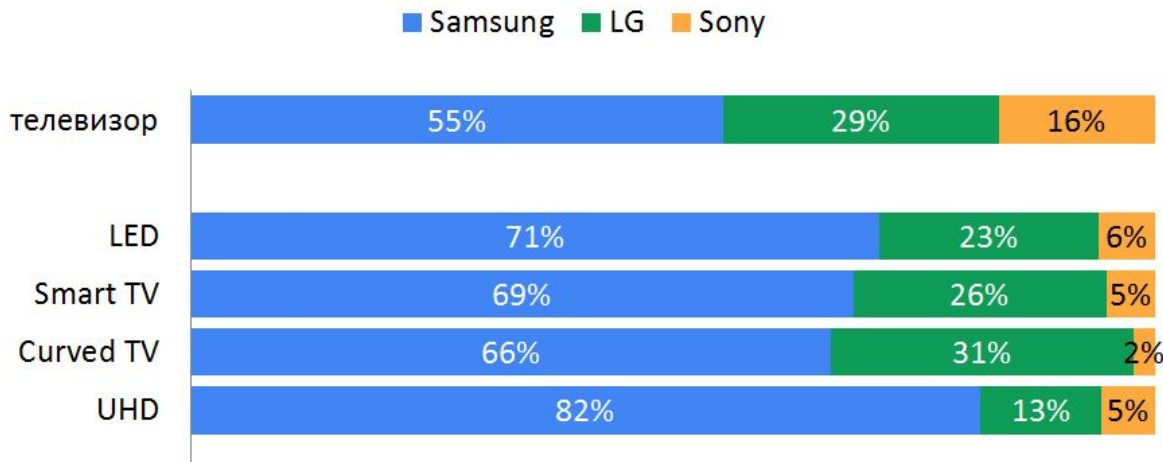
Volume of branded TV-related searches & probability of co-searches, 2015



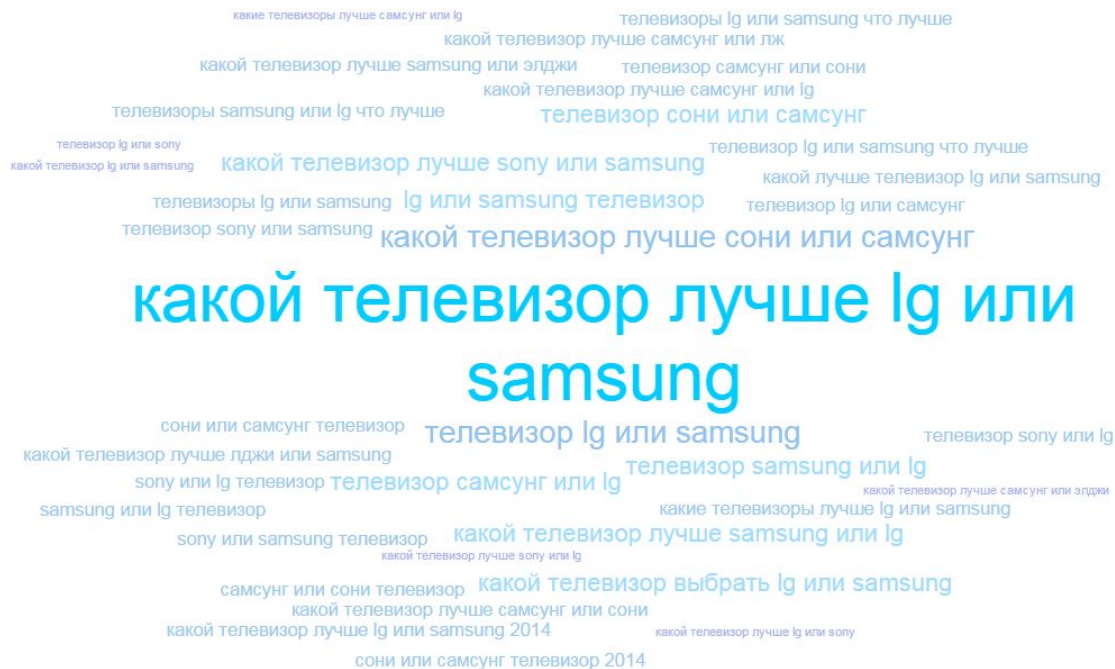
The closer 2 bubbles are the more likely this TV brands were searched during same session

In 2015 Samsung is #1 TV brand by number of searches in each subcategory...

Share of branded TV-related searches by OEMs, %, HY'2015

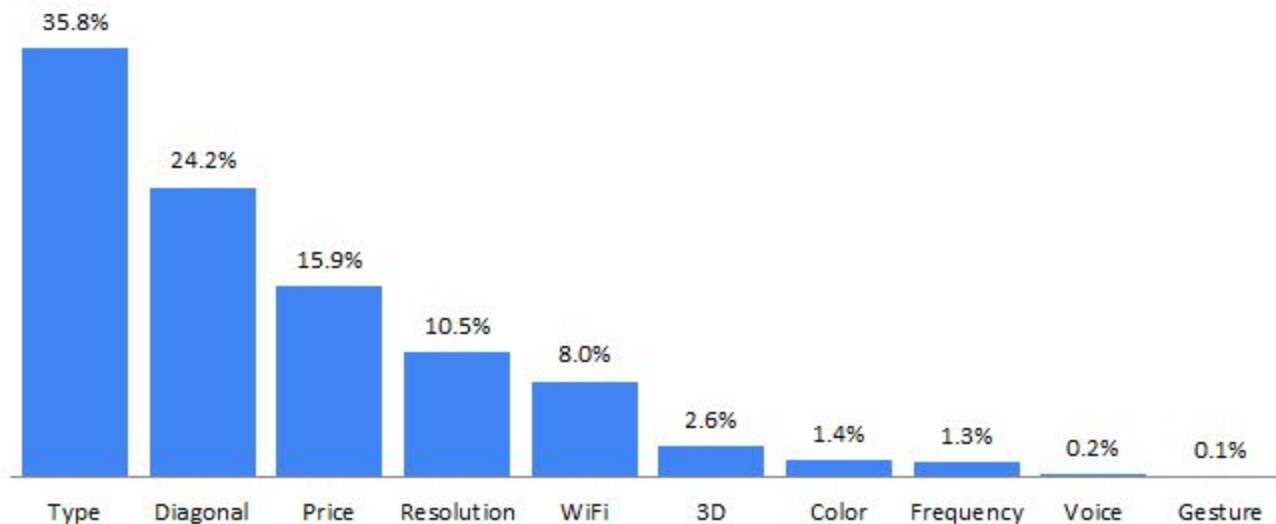


Users like comparisons. Someone should tell them which brand is better

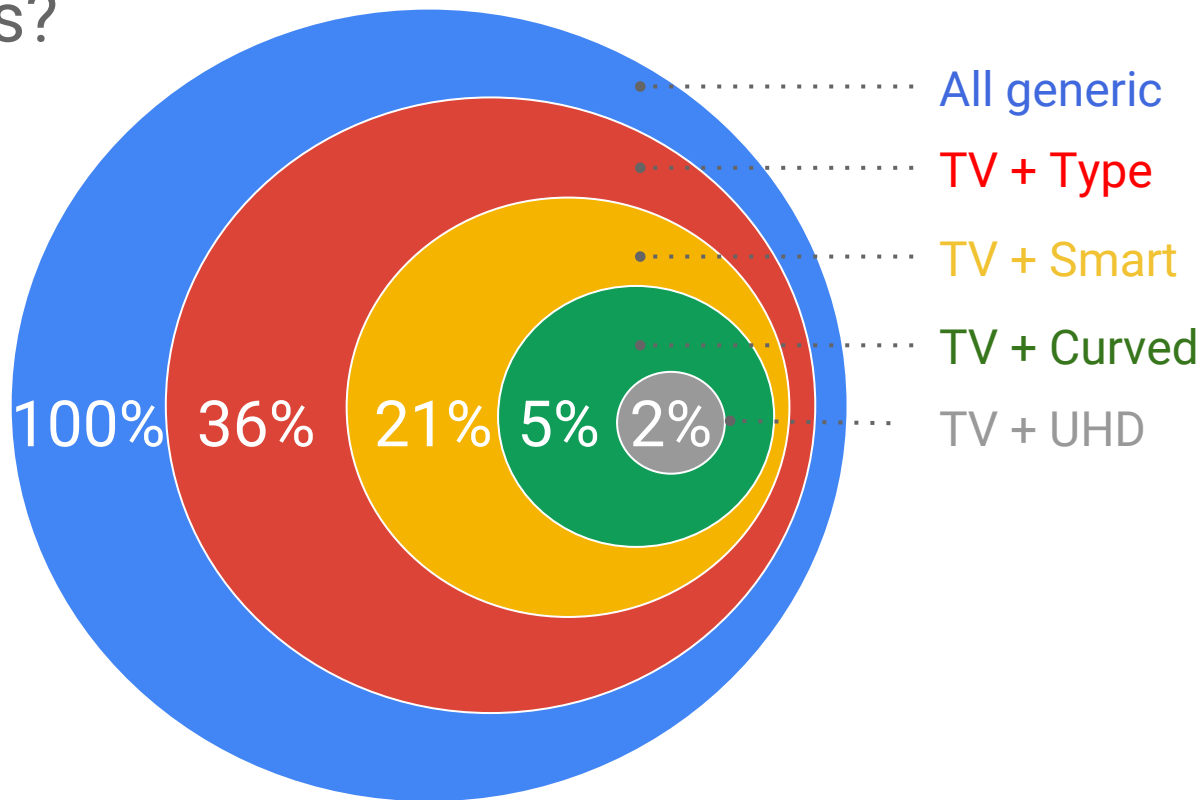


Users are researching for TV mainly by their characteristics rather than type

Share of generic TV-related searches by types, %, HY'2015

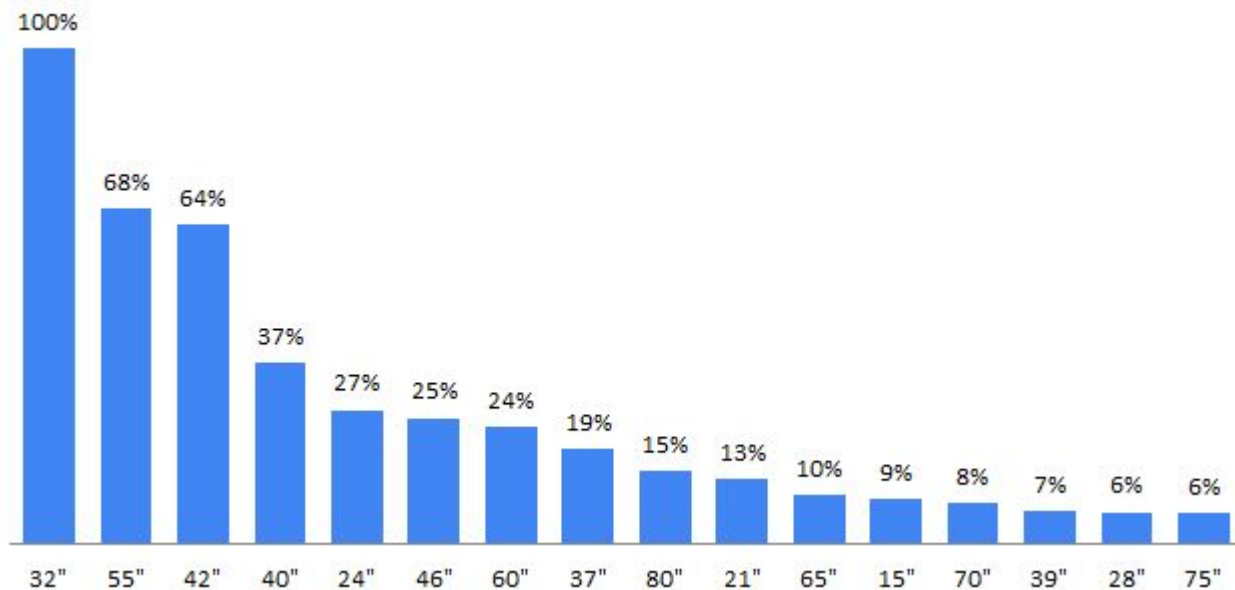


Who people are searching for different types of TVs?

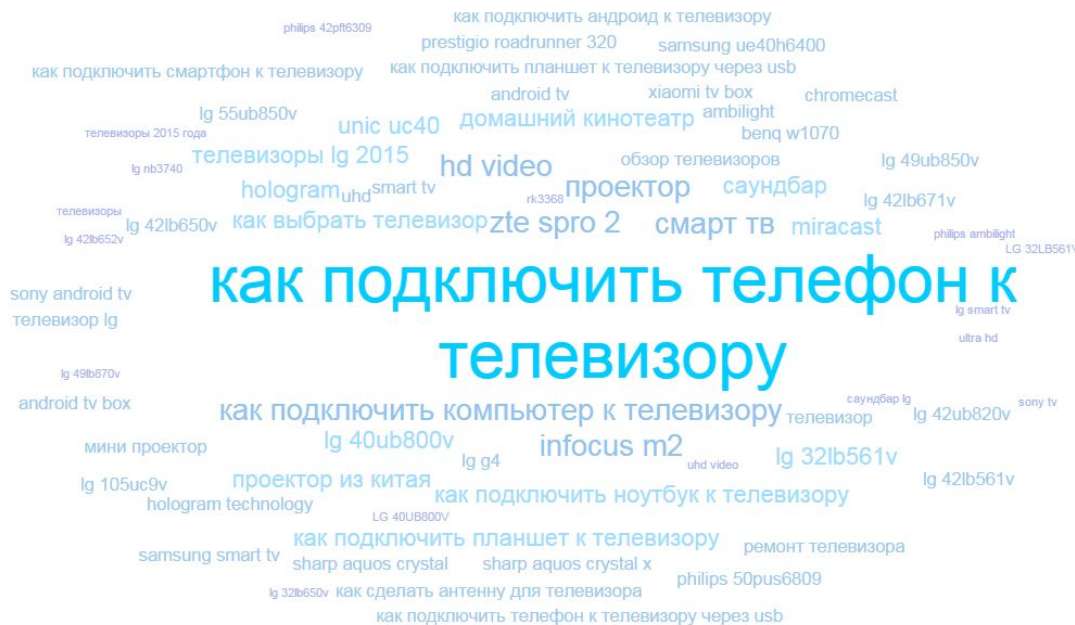


People prefer 32", 55" and 42" TVs

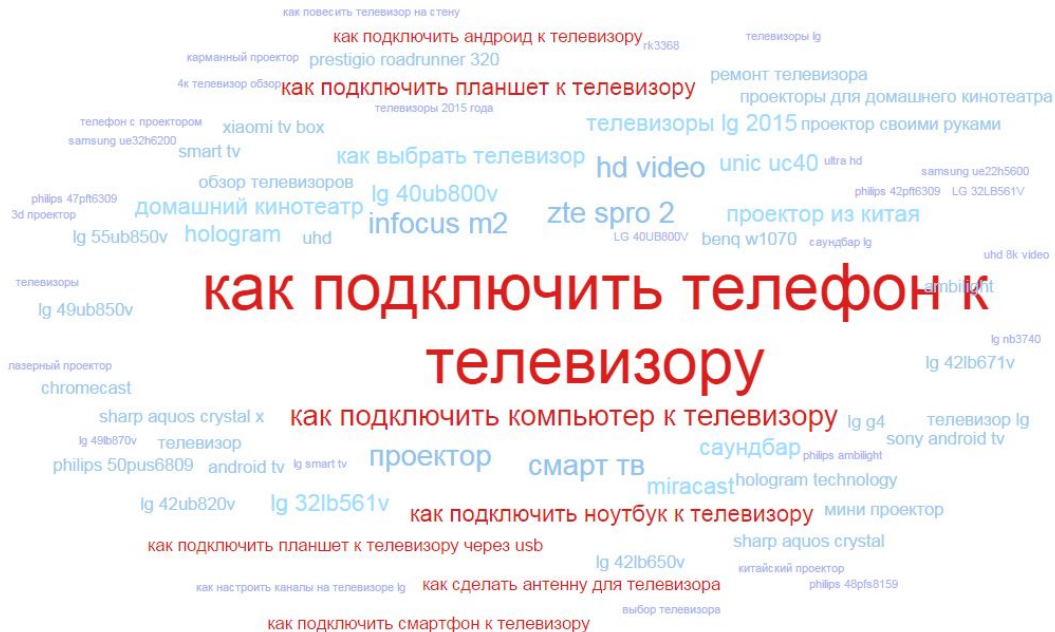
Indexed number of TV range-related searches,
HY'2015



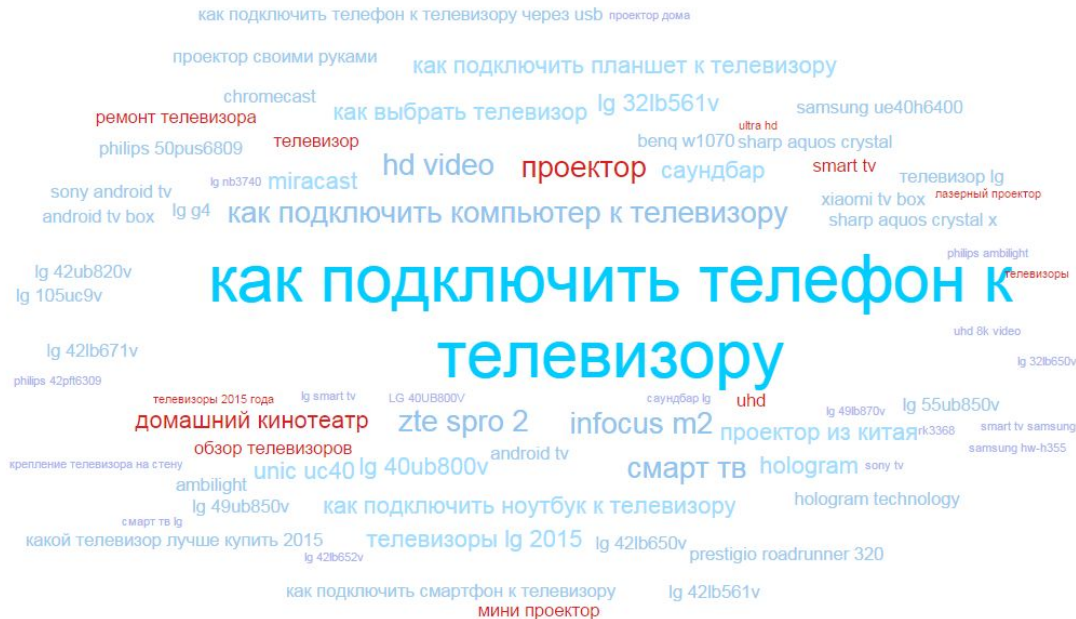
Here's what people look for on YouTube about TV.
This cloud can be segmented on three parts...



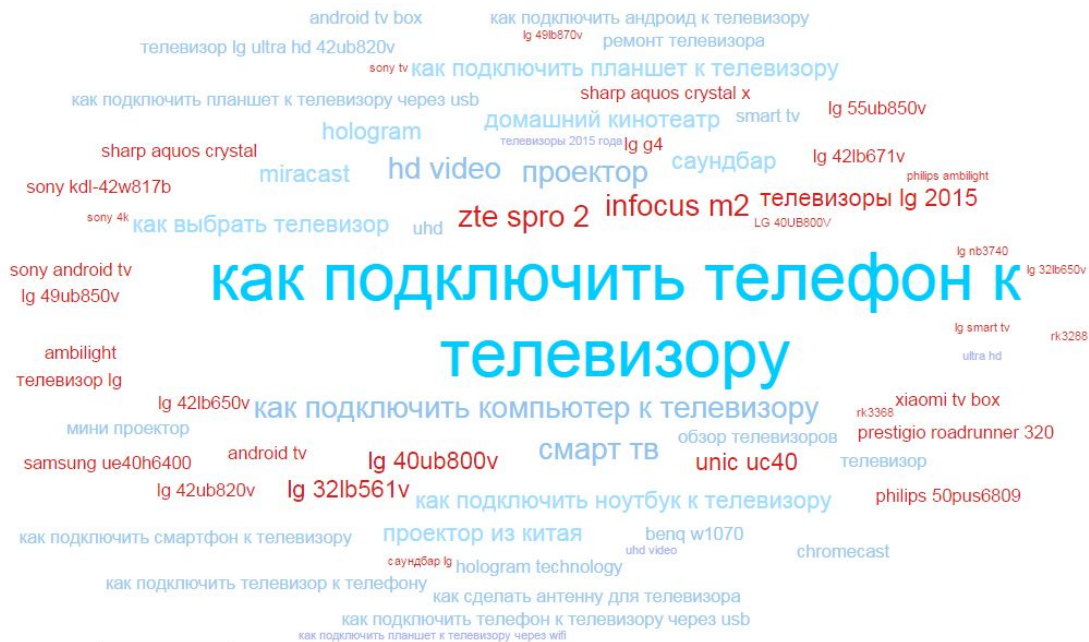
Main theme on TV-related searches are about connecting different devices to TVs



Next - people are just looking for some generic videos for inspiration



And finally, unlike usual search people look for exact models on YouTube



Thank you

