Media Consumption in Russia

Key trends

Prepared by Deloitte CIS Research Centre based on our 2015 Comprehensive Survey
January 2016
We are pleased to present the results of our first research initiative dedicated to a comprehensive study of media consumption in Russia. Today’s technology and data transfer opportunities make the information space virtually boundless. An increase in the number of communication channels has resulted in drastic changes in ways the information is received, exchanged, transferred, consumed and, importantly, perceived.

On the one hand, the expansion of communication channels creates comfortable conditions for business development, allowing free access to target audiences. On the other hand, consumers have become more demanding regarding the quality of information, making it more difficult to win their loyalty.

In this respect, the Internet becomes a natural leader compared to other media categories, mostly due to its reach based on connection costs, the number of providers, the high level of Internet services, the speed of finding any information, and availability to all household categories. For many users, the Internet has become a way of life. According to our findings, Internet usage in Russia has increased by 61 percent between 2012 and 2015.

In our report, we tried to show the most interesting trends and present our vision of the current environment.

We hope that you will find the identified trends interesting. Moreover, the detailed review of trends in this field contributes to our professional knowledge, given that our clients include leading high technology and TMT companies.

We plan to carry out this survey annually.

We will be honoured to provide you with a full version of our report containing the results of the in depth analysis of the data and featuring significant differences between federal districts and cities of the Russian Federation (e.g., Moscow, St. Petersburg, cities with a population over/ below 1 million), socio-demographic groups and other social categories.

To obtain the full version of the report, please write to us at: cisresearchteam@deloitte.ru.

Olga Tabakova
Partner
CIS TMT Industry Leader
Methodology

Research objective
In-depth review of trends in Russian media consumption.

Goals of the survey:
- Describe changes in the media usage patterns by respondents in the past three years (2012-2015);
- Single out the main types of media usage by respondents on working and non-working days;
- Study the media behaviour of respondents in detail, by looking into the way they obtain information, thematic preferences, time spent and other criteria;
- Analyse types of devices used to consume media content: which devices respondents use and under what circumstances;
- Evaluate respondents’ tolerance for advertising (depending on the type of the media source);
- Assess trust in various sources of information (with respect to both Russian and foreign mass media);
- Carry out a comparative analysis of consumer profiles with respect to different media sources.

Methodology
In order to achieve the above-mentioned goals, we used both qualitative and quantitative data collection methods:
- Online polling based on representative sampling in Russia (1,600 respondents);
- Focus groups for Moscow citizens aged 18-28.

Geographic scope of the survey
Russia.

Target audience:
Russian citizens aged 16+.

Sampling method:
multistage stratified sampling of the Russian population by gender, age and type of city: 1,600 people, 9 federal districts, 46 regions, no less than 110 cities and towns.
Key findings

Overall, media usage in Russia has increased in the past three years (2012–2015).

- Average, every third respondent pointed to increased media usage by him/her
- Total media usage index: +31%
- Highest media consumption growth was in Moscow

Media usage increased primarily in the following segments:
- +61% Internet
- +31% Electronic books
- +10% Video games

Media usage declined in the following segments:
- –17% Print media
- –9% Printed books
- –7% Radio
- –5% TV

Media usage increased primarily in the following segments:

Media usage declined in the following segments:

Youth (aged 16-24) tend to watch less TV. 58% of young respondents said they watched TV less often, which exceeds the average number by 22 pp.

The TV–watching index in this group is –26%.

Respondents aged 16-19 read more e-books. 88% of respondents said they read e-books more often. The e-reading index in this group is 65%.

We believe that this trend could mostly be explained by the young generation’s active lifestyle in which they frequently read books when travelling or spending time outside the house.

Today, general information/news is the most widely consumed type of content – This is likely a result of economic and political instability in Russia and abroad. We looked at how much time on average Russians spend on reading, watching and listening to news:

- 4.7 views per week, 1 hour 9 minutes
- 2.4 views per week, 37 minutes
- 4.3 views per week, 3 hours 34 minutes

Other popular segments/types of media activity:

- Movies and TV series
- Russian and foreign music
- Informal communication, skewed to messengers (Skype, email, blogs, forums, social media)
- Scientific and educational topics
Presently, video games stand out due to a contradictory relationship: while admitting the lack of usefulness when it comes to video gaming, respondents indicate higher gaming activity in their responses.

Key findings

We will consider the key findings and trends in more detail in the sections below.

The audience reach is approximately at the same level for both TV and Internet, although respondents tend to value the Internet as a more productive use of time.

1 in 2 stated the Internet was useful

1 in 10 stated watching TV was useful

Internet users pointed to the following advantages of the Web:

- High speed of information exchange
- Convenience of data storage and transfer
- Access to a large number of information sources, etc.

Interestingly, none of the focus group participants could imagine their life without the Internet. Respondents can suspend their Internet activity only briefly (for a couple of days), for example, during vacation. Importantly, Internet activity constitutes a main component of the average Russian’s working day. As a result, respondents report that any restriction on internet access leads to lower daily productivity.

Given the identified advantages of the Internet, the latter is likely to further gain strength in the media market. This trend can be constrained only by technical factors and Internet access costs.

58% Fifty-eight percent of respondents who play video games believe that their day would be more productive without video gaming. However, recognition of this does not appear to encourage the respondents to spend less time on video gaming.

20% Video games are at the bottom of the media usefulness rating (20 percent below the average).

We attribute this to the following factors:

Fast evolution of the video game industry
The product line is developing constantly, producers are increasing their presence on developing markets, the number of gamers continues to grow even during times of economic instability.

Increasing number of Internet users
Growing Internet activity is directly related to an increase in the number of gamers, with online games being a key component of the video game market.

FREE
Free of charge games
This marketing strategy is becoming more popular, especially with the decreasing purchasing power of consumers. If a person likes a free game, in the future he/she may agree to pay for it or acquire some of the attached options/functions.

Growing availability and mobility of video games
Given that 77 percent of Russians own smartphones, they have access to mobile video games.
Media content consumption by average Russians

Usage of core media

Trends

Basic media usage by respondents (two-week period)

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Usage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>100%</td>
</tr>
<tr>
<td>TV</td>
<td>94%</td>
</tr>
<tr>
<td>Radio</td>
<td>61%</td>
</tr>
<tr>
<td>Print media</td>
<td>57%</td>
</tr>
<tr>
<td>Video games</td>
<td>53%</td>
</tr>
<tr>
<td>Print books</td>
<td>44%</td>
</tr>
<tr>
<td>E-books</td>
<td>44%</td>
</tr>
<tr>
<td>Cinema</td>
<td>37%</td>
</tr>
<tr>
<td>Theatres/concerts</td>
<td>16%</td>
</tr>
</tbody>
</table>

* Based on the data collection method (online survey)

Specific patterns

TV watching

TV watching is the least popular in the 16-24 age group (9 percentage points (pp) below the Russian average).

"...TV news as backdrop, watch if something draws my attention."
"can do without TV at all."
"watch TV very rarely, only occasionally, when a movie or a show like "The Voice" or "Dances" attracts attention]...
"If I find something that interests me, I watch it for some time, but then find it on the Internet and continue watching online."

Radio listening

Males aged 30-39 are the most frequent radio listeners (7 pp above the Russian average).

"Sometimes I listen while driving."
"...yes, sometimes I listen when I am in the car with my parents."
"For me, radio is associated only with the dacha (summer house)."

Focus group (aged 18-28)
Media content consumption by average Russians

Specific patterns

Print media
Youth under 19 and singles read print media least often (8 pp below the Russian average). The latter can be explained by Russians most often reading print media bought by their cohabitants or those distributed free of charge. Also, based on the results of focus group polling, younger respondents believe that printed newspapers are less convenient to use due to the big size.

Video games
Muscovites play video games most often, (9 pp above the Russian average), followed by male respondents (by 9 pp) and Russians aged 20-39 (by 7-10 pp).

Book-reading
E-reading is the most wide-spread among young respondents aged under 19 (8 pp above the Russian average). Printed books are most favoured by women (6 pp above the Russian average).

“...There is such consideration as: what are you going to do with the magazine after you finish reading it? It instantly makes you an adherent of electronic content.”

“...I read [print media] when I come to a [cafeteria] and see newspapers there. I can take it to read it on the way.”

“I don’t like printed newspapers because they are oversized.”

“...newspapers are really inconvenient in our fast-moving Moscow. However, you can read it during breakfast, there is some charm of life in this, a day-off tradition.”

“...I can get everything online. However, I subscribed to a finance and investment magazine, which I regularly receive. If I find anything interesting I can look for more detail on the Internet later.”

“I used to play video games before; I hardly play them these days. Frankly, I was bored with them pretty quick.”

“...I play but only for the sake of team spirit.”

“90 percent of my colleagues in the department prefer e-books, but I love printed books. I believe that we are a reading nation. I use e-books and audiobooks, I can quickly read an electronic book, but it is tasteless.”

“I prefer printed books. You cannot throw it away, you can reread it.”

“...only printed books, it is about tactile perception, you can make notes, smell it, it is nicer to see...”

“printed books are nice to hold in the hands, etc., but it is the other way round with newspapers – it is better read them in the electronic form.”

“...I read only printed books. I leave good books at home, add them to my library. Around ten books a year.”

Focus group (aged 18-28)
For several decades, TV was a key media channel in terms of targeting an audience and time spent. However, as Internet technology advanced, interest in TV has started to fade. In particular, TV has lost the most among a young audience (under 24) – the key target group for advertising. Notably, this group’s media activity has not declined, but has reoriented toward the Internet. Also, youth tend to be passive TV watchers (viewing it in the background with relatives/friends/acquaintances). Hence, older respondents tend to be more selective when it comes to the choice of content. Therefore, we would recommend that businesses targeting a young audience should take into account the specifics of this demographic, i.e. sensitivity to current changes in the media market including higher Internet activity, lower interest in TV, passive TV viewing, preference for e-books.
Media content consumption by average Russians

Shifts in media usage in 2012-2015

- In 2012-2015, overall media consumption rose by 8 percent in Russia.
- Moscow boasts the highest level of media consumption (14 percent above the average).
- The highest growth was in the Internet segment (+61 percent): 77 percent of respondents reported that they spent more time in this media environment compared to 2012.
- E-books ranked second by usage growth (+31 percent) as every second respondent (56 percent) said he/she dedicated more time to reading e-books than in 2012.
- Video games were in third place (usage up 10 percent), with 39 percent of respondents stating they spent more time on video games compared to 2012.
- Print media came in last place with usage down 17 percent between 2012-2015, indicating that a majority of Russians read print media less often (the share of such respondents was 41 percent).
Media content consumption by average Russians

Shifts in media usage in 2012-2015

Specific patterns

TV watching
TV usage declined most significantly among youth and students (-29 and -27 percent, respectively). Meanwhile, older respondents reported higher TV usage (+13 percent).

Internet
Internet activity increased more among women than among men (66 vs. 57 percent, respectively).

Print media/books and electronic books and media
Respondents under 19 started reading more than other groups:
• e-books (+65 percent);
• printed books (+39 percent);
• print media (+23 percent).
This can be explained by youth being in a developmental phase; this is supported by the focus group statements:

“...I almost stopped watching TV...I don’t even know what is on now.”

“I read more economic news because it has just become more interesting and also due to the work I do.”

“I read many professional books in printed form, especially when I prepare for various exams and certifications.”

“Yes, I’ve become interested in serious news now, too... the older I get the more interesting it is.”

“Sometimes, I spend time in social networks for no reason. For example, Instagram is relaxing. I check it, relax and go on working.”

Focus group (aged 18-28)

In summarising the changes in the media consumption in the past three years, we note a significant decrease in the informational value of radio. Although it ranks third in terms of target market reach (61 percent of respondents listened to the radio at least once in the past two weeks), radio usage has decreased in the past three years. This channel also has its specifics; the audience mostly consists of middle-aged men who listen to the radio while driving.

Overall, in the past three years media consumption has shifted towards the use of electronic media (e-books, online media, etc.).
Media content consumption by average Russians

Information content and usage patterns

Trends

Top-3 popular segments in each media category

- General news (daily news)
- Movies
- TV-series

- Search engines
- News via personal page in social media
- Informal communication (Skype, email, blogs, forums, social media)

- General news (daily news)
- Russian music
- Foreign music

- General news (daily news)
- Social and political topics
- Scientific and educational programmes (travel, etc.)

News is the most popular media content. The main trend in online communication is a shift from email to social media and to messengers.
Media content consumption by average Russians

Information content and usage patterns

Specific patterns

TV
• Most Russians switch on TV-sets on both work days (33 percent) and days off (41 percent) intending to find something to watch and if they do not find anything interesting, they leave the TV sets switched on as a backdrop.
• The next most popular purpose for switching on the TV is to watch a particular programme (31 percent on working days and 25 percent on days off).

Internet
The nature of Internet activity depends on the device used to access the Web:
• The majority of respondents access the Internet most often and for extended periods using desktop computers and notebooks (77 and 64 percent, respectively);
• Most users use tablets to access the Internet for brief periods of time (57 percent);
• Smartphone users (74 percent) connect to the Internet for both long and short time periods.

Radio
• Respondents most often listen to radio in the car (39 percent on working days and 36 percent on days off):
  – Men, as well as respondents aged 30-34 and 45-54 listen to the car radio somewhat more often than other categories (6, 5 and 7-10 pp, respectively).
  – On days off, Russians prefer to listen to the radio at home (42 percent).

Print media
• One in two respondents (54 percent) buys print media:
  – 44% of respondents buy print media on a regular basis;
  – 56% of respondents buy print media irregularly.
Sixteen percent of the print media readers subscribe to specific publications (the share of such respondents aged 55+ exceeds the average by 5-10 pp). Meanwhile, 24 percent of respondents buy publications in order to fill spare time.
• One in five respondents most often read print media distributed free of charge (21 percent):
  – The share of such readers is particularly high among youth aged 16-24 (10-17 pp above the average) and respondents aged 60+ (6 pp above the average).
• Fourteen percent of respondents read print media in a social setting rather than buying it or read publications bought by their friends/colleagues/relatives.

It is common knowledge that media consumption grows in times of economic and political instability. This was the case in 2008-2009 and in 2014-2015. News is the main content being consumed. We note that today it is becoming more popular to get news from personal news feeds in social media.
Media content consumption by average Russians

Media usage in Russia

Trends

- Yes, I am an active media user, I share news with friends/acquaintances/colleagues both in person or via the Internet (social media, blogs, forums, etc.)
  - 47%

- Yes, I am an active media user but I prefer to share news with friends/acquaintances/colleagues in person
  - 34%

- Yes, I am an active media user and prefer to share news with friends/acquaintances/colleagues via the Internet (social media, blogs, forums, etc.)
  - 8%

- Yes, I am an active media user but I don’t share news with friends/acquaintances/colleagues in person or via the Internet (social media, blogs, forums, etc.)
  - 11%

Specific patterns

The percentage of active media users (who share news with friends/acquaintances/colleagues both in person or via Internet) is the highest among youth aged under 29 years (56-58 percent).

Lower media usage is observed among respondents aged 40+.

Some media usage growth (from 30 to 38 percent) is also seen in the 60+ group.

Focus group (aged 18-28):

- "... I was very active when I was 19-20, I took part in discussions. However, now only with friends. Overall, I communicate less."
- "I use [the Internet] to get news, mail, have accounts in social networks, but communicate rarely, only when I need to find friends and relatives in other cities, so I don’t feel lost."
- "I use social media very rarely, mostly Facebook, in order to communicate with friends abroad."
- "Many use messengers to communicate..."
- "I started to use messengers more often. I hardly use social media for communication..."
- "I share news via email, Viber, PDAs."
- "I share news via email, Viber, Skype, VKontakte."

...
Media content consumption by average Russians

Attitude towards new gadgets

Trends

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I choose tested models (with a proven track record), not new gadgets</td>
<td>35%</td>
</tr>
<tr>
<td>I buy the latest gadgets but only after comparing them to other new</td>
<td>31%</td>
</tr>
<tr>
<td>products and deciding on the best</td>
<td></td>
</tr>
<tr>
<td>I probably am not in the first ranks of new gadget buyers but I prefer</td>
<td>16%</td>
</tr>
<tr>
<td>buying them before the majority goes after them</td>
<td></td>
</tr>
<tr>
<td>I will buy a new device only after it becomes a standard and there is</td>
<td>8%</td>
</tr>
<tr>
<td>no alternative</td>
<td></td>
</tr>
<tr>
<td>I buy the latest gadgets as soon as they appear on the market – I prefer</td>
<td>5%</td>
</tr>
<tr>
<td>to be in the first ranks.</td>
<td></td>
</tr>
<tr>
<td>Usually, I don’t pick technical devices (get them as gifts, receive at</td>
<td>4%</td>
</tr>
<tr>
<td>work, other)</td>
<td></td>
</tr>
</tbody>
</table>

Specific patterns

- Overall, respondents demonstrate quite rational behaviour towards new gadgets, with 66 percent opting for tested devices or buying them only after comparing gadgets.
- The citizens of the two main Russian cities – Moscow and St. Petersburg – are more willing to be in the ranks of the first buyers (27 and 26 percent, respectively), with Muscovites being more addicted to technical novelties:
  - 15 percent of Muscovites prefer buying new gadgets as soon as they appear on the market.
  - The share of consumers who prefer tested devices versus new gadgets is significantly lower among Muscovites (18 percent).
- The reverse trend is typical for the populations of small Russian towns and respondents with secondary education – the share of those who choose tested devices is higher among them (40 and 46 percent, respectively).

"I am interested to know what is available, but I am not rushing to buy it. Moreover, the price of new gadgets is unreasonably high."

"I will buy a new gadget only if I need it or if my current gadget is too outdated. I study the technical specifications of new gadgets. Sometimes, they may look appealing, but I see no sense in switching to a new device if there is no drastic difference."

"... I track all new gadgets. Both for my own interest and from the standpoint of progress. Which companies access the market and how, but only the headliners. I have zero knowledge about the Chinese market. I only track the leading brands. I don’t buy because there are lots of new gadgets. I consider costs as well. Probably, I would buy, but I cannot."

"...there is a lot of information about gadgets, but the abundance of information is not always helpful in understanding the usefulness. I am very sceptical about new [devices]."

Focus group (aged 18-28)
Media content consumption by average Russians

Russian household ownership of media devices

**Trends**

- **Top position** – TV (98%)
- **Second position** – smartphone (83%)
- **Third position** – desktop (77%)

Almost all TV-set owners say they watch TV. The media usage index is 92 percent.

Respondents use mobile phones less often than desktops and notebooks (66, 71 and 73 percent, respectively).

Smartphones are used more often than mobile phones (by 6 pp).

The declining popularity of radio is supported by the data on ownership of media devices. For example, 14 percent of respondents owning radios stated that they do not use them at all. Radios are more frequently used in cars, in line with the earlier identified profile of the Russian radio listener.

We note that consumption of video content is shifting to the Internet. Thirty-three percent of respondents own DVDs and VCRs but do not use them. Russians increasingly prefer to watch movies, TV series and short video clips on the Internet using their desktops or notebooks. Viewers of TV programmes initially seen on TV continue to watch these programmes later on the Internet (this is more typical for the young audience).

**Specific patterns**

Despite the high share of respondents who indicated ownership of radios (75 percent), DVD/video players/PVRs (73 percent) and audio systems (64 percent), the percentage of those using these devices is significantly lower. The usage index value equalled 46 percent for radios, 30 percent for audio systems and DVD, and mere 6 percent for PVRs.

The high share of respondents owning games consoles (52 percent), MP3 players (48 percent), and e-books (47 percent) also contrast with the low usage index values equalled 13 percent for games consoles, 8 percent for MP3 players, and 6 percent for e-books.

Respondents use mobile phones less often than desktops and notebooks (66, 71 and 73 percent, respectively).
Media content consumption by average Russians

### Attitude towards advertising: tolerance

The overall tolerance for advertising is -9 percent, indicating a predominantly negative sentiment.

- The lowest tolerance is for radio and TV advertisements (-17 percent).
- Russians are more tolerant toward ads in print media (+6 percent).

### Specific patterns

More active media users are more tolerant to advertising than less active media users (2 percent versus –27 percent, respectively).

- Those who prefer to share news in person show significantly lower tolerance for advertising (~19 percent), in particular for Internet advertising (~21 percent). The focus group responses indicate that advertising is one of the factors behind decreased use of social networks.
- Early buyers of new gadgets appear to be the most tolerant of advertising (+10 percent) – they demonstrate the strongest tolerance for internet ads (+18 percent) and print media ads (+15 percent).

"I may like an ad if there is a plot. It’s also important that it fits the product and is humorous ... in other words, a sausage ad should not be like a construction ad."

"... some ads can be quite creatively designed and interesting to watch."

"... Mercedes and Jaguar ads are nice."

"... I like Pepsi ads."

Focus group (aged 18-28)
Media content consumption by average Russians

### Attitude towards advertising: effectiveness

#### Trends

<table>
<thead>
<tr>
<th>Medium</th>
<th>Advertising useful/efficence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>16%</td>
</tr>
<tr>
<td>TV</td>
<td>7%</td>
</tr>
<tr>
<td>Print media</td>
<td>-1%</td>
</tr>
<tr>
<td>Radio</td>
<td>-26%</td>
</tr>
<tr>
<td>Average</td>
<td>-1%</td>
</tr>
</tbody>
</table>

- Internet advertising was assessed to be the most effective (16 percent).
- TV advertising ranked second by effectiveness (7 percent).
- Radio advertising lagged behind the rest by effectiveness (-26 percent).

#### Specific patterns

- People in Moscow and St. Petersburg and in those cities with a population over 1 million are more tolerant towards advertising, with the overall advertising usefulness at 5-6 percent.
- Women consider advertising to be more useful than men (0 percent versus -2 percent).
- Negative responses were most frequent among youth aged under 19 (-11 percent), respondents aged 50+ (from -8 to -19 percent), as well as singles (15 percent).
- Media users who actively share news and early buyers of new gadgets also rated advertising usefulness high (+12 and +20 percent, respectively). The latter consider Internet advertising more useful (28-40 percent).

The Internet is the most efficient platform for advertising policy. The Internet’s advantages are primarily based on the rapidly developing digital technologies which make it possible to deliver information to any target audience. Moreover, tolerance for Internet advertising is stronger than that for advertisements in other media.

We identified three key criteria of tolerance for advertising in our focus group polling: 1) high-quality video; 2) semantic correlation; and 3) humour.

The population of Moscow and St. Petersburg and women are the most easily accessible audience. Meanwhile, it is more difficult to win consumer attention to products through advertising among males, youth (under 19) and older (50+) audiences, as well as singles.
Media content consumption by average Russians

Attitude towards mass media: trust

Trends

Mass media ranking by trust level:

<table>
<thead>
<tr>
<th>Media Source</th>
<th>Trust Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>News, analysis, official websites on the Internet</td>
<td>40%</td>
</tr>
<tr>
<td>TV</td>
<td>29%</td>
</tr>
<tr>
<td>Social networks and Internet blogs</td>
<td>14%</td>
</tr>
<tr>
<td>Opinions of people/acquaintances</td>
<td>8%</td>
</tr>
<tr>
<td>Newspapers or radio</td>
<td>2%</td>
</tr>
</tbody>
</table>

Specific patterns

- News websites enjoy higher levels of trust from the following categories:
  - St. Petersburg citizens (48 percent);
  - Singles (45 percent);
  - Youth and respondents aged 60-65 (45 and 47 percent, respectively).

- Information from social networks and Internet blogs is mostly trusted by Muscovites (5 pp above the average).

- Trust in TV is above the average among people aged 65+ (by 6 pp above the average).

Our survey shows that trust in the reliability of Internet sources is a key driver for the development of this platform. It is likely that the low trust in TV is what drove the decline in TV viewership.

Notably, those who are less sensitive to advertising have more trust in the Internet (a complex target audience for business purposes). Hence, the Internet is a suitable media platform for businesses targeting young singles. At the same time, TV is likely to have a greater impact as an information source on the older audience (65+). However, currently the bulk of TV content targets younger audiences who are becoming less interested in TV.
Media content consumption by average Russians

Attitude towards mass media: Russian or foreign source?

Trends

64 percent of respondents prefer receiving information from Russian sources.

Whether Russian or foreign source makes no difference for 30 percent of respondents.

6 percent of respondents prefer foreign sources over Russian ones.

Specific patterns

Sixty-seven percent of TV watchers and newspaper readers prefer these sources to be Russian ones.

St. Petersburg citizens are more inclined toward foreign sources and attach less importance to obtaining information only from Russian sources (by 10 percent).

“...I think that American news is too emotional and it is impossible to draw rational conclusions from it.”

“European news is better structured (e.g. BBC), more enjoyable visually, but not always objective towards Russia (superficial analysis)... albeit I sometimes watch in order to get an overall picture.”

The growing uncertainty caused by geopolitical developments starting from 2014 has definitely added to differences in the informational content of Russian and foreign sources. However, more than a third of respondents (36 percent) consider it useful to receive information from foreign sources. The results of our focus group polling suggest that this trend can be explained by respondents noting that Russian news is increasingly politically charged and the number of independent information sources has diminished.
Technical aspects of media consumption

### Internet connection
- Dedicated line (direct Internet connection): 52%
- Wireless Internet: 44%
- Mobile Internet: 29%
- ADSL-connection: 12%
- Cable modem connection: 11%

### TV connection
- Individual cable antenna: 38%
  - The share of such users is particularly high in the Volga Federal District (46%), Urals Federal District (45%) and Siberian Federal District (43%).
- Internet TV: 30%
  - This type of connection most frequently occurs in the Crimean Federal District.
- Common antenna: 37%
  - Most frequently used in the Central Federal District.
- Satellite TV: 25%
  - Popular in the North Caucasian Federal District (44%) and Crimean Federal District (38%).

### Radio connection
- Car radio: 42%
- Radio set: 23%
- Mobile device: 18%
- Internet, using a computer: 13%
- Home audio system: 15%
- Working days: 12%
- Days off: 7%

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### Methodology
- Media content consumption by average Russians
- Technical aspects of media consumption
- Types of Internet connection
- TV connection
- Radio connection
- Media consumption in Russia in figures
- Contacts
Media consumption in Russia in figures

Size of the target audience
- Internet: 100%
- TV: 94%
- E-books: 61%
- Print books: 57%

Frequency of usage
- Internet: 5.5 times a week
- TV: 4.5 times a week
- E-books: 3.5 times a week
- Print books: 2 times a week

Duration of media source usage
- Internet: 2 hours 17 minutes working day, 1 hour 36 minutes day off
- TV: 3 hours 35 minutes working day, 1 hour 23 minutes day off
- E-books: 4 hours 31 minutes working day, 34 minutes day off
- Print books: 3 hours 35 minutes working day, 1 hour 23 minutes day off

Overall usefulness rating of media sources on both working days and days off
- Internet: 61% working day, 51% day off
- TV: 5% working day, 3% day off
- E-books: 1% working day, 1% day off
- Print books: 0% working day, 0% day off
- Radio: -1% working day, -3% day off
- Print media: -3% working day, -5% day off
- Video games: -25% working day, -16% day off

Overall usefulness rating of media sources
- Internet: 56%
- TV: 11%
- E-books: 1%
- Print books: 0%
- Radio: -1%
- Print media: -3%
- Video games: -20%

Overall, one in two respondents considers the Internet a useful media source. Although TV’s reach is almost as strong as the Internet, the usefulness of watching TV is considerably lower than that of online sources – a mere 10 percent of users point to the exceptional usefulness of TV as a media source.

Video games ranked last in the media usefulness rating (~20 percent).
Contacts

Marina Elovskaya
Senior Manager
Business development, CIS
melovskaya@deloitte.ru

Authors:
If you have any questions regarding the survey, please do not hesitate to contact us.

Olga Tabakova
Partner
CIS TMT Industry Leader
otabakova@deloitte.ru

Anton Shulga
Corporate Finance Partner
CIS Telecom Leader
ashulga@deloitte.ru

Ekaterina Lukianova
TMT Industry Development Coordinator
elukianova@deloitte.ru

Lora Zemlyanskaya
Deloitte Research Centre, CIS
lzemlyanskaya@deloitte.ru