Media consumption in Russia
Growth in media consumption during large sport events
Deloitte CIS Research Centre
Moscow, 2017
We are pleased to present the results of our third comprehensive study of media consumption in Russia.

Recent years have seen major changes in the structure of media consumption as a result of the evolving Internet. Network technology has transformed the way people communicate and consume media content, spurring the rise and growth of new tools and solutions across the advertising industry. Businesses have enthusiastically engaged in developing new forms of customer communications while actively expanding their advertising budgets for this segment. However, this rush for customers has triggered a massive and aggressive flow of online advertising that seems to be facing resistance from audiences. As a result, the past two years have seen a dramatic decline in tolerance for advertising, with users starting to take steps to curb this trend.

Despite this, online advertising still has a huge potential. However, it requires an appropriate approach to audience segmentation, as well as the use of tailored content. Therefore, tracking the media preferences of Russians plays an important role in this context. There is also another area of research aimed at identifying patterns of how audiences consume media content during large sporting events. Such large-scale events offer plenty of opportunities for businesses in terms of both boosting sales and positioning their brands, locally and abroad. The changes we have identified in media consumption trends could be useful for companies as they plan their strategy and look at their future opportunities for 2018, particularly when it comes to the 2018 FIFA World Cup in Russia.

With the use of data collection and analysis methods that combine both the qualitative (i.e. focus groups and interviews) and quantitative (the nationwide survey) approaches, we have been able to obtain a deeper understanding of the trends, mapping some potential areas where these findings can be leveraged by the market.

We will also be pleased to provide you with a full version of the report (tailored to each client, taking into account goals and objectives) with in-depth data analysis findings and significant distinctions highlighted among federal districts, major cities such as Moscow and Saint Petersburg, cities with populations of over 1 million and for various socio-demographic groups and other social categories.

If you are interested in a full version of the report, please write to us at cisresearchteam@deloitte.ru.
Methodology

Purpose of research
The research studies the trends in Russian media consumption.

Target audience
Russians Internet users over 16 years of age (due to the survey method used) (“Russians”).

Research goals
• Highlight the nature of shifts in Russians’ media consumption over the last three years (2015–2017);
• Take a detailed look at Russians’ media behaviour in terms of information channels used, thematic preferences, time spent and other criteria;
• Assess Russians’ level of trust in various information sources;
• Analyse what media devices are used to access media content;
• Look at how Russians make online purchases;
• Assess Russians’ tolerance for advertising, including by type of media activity;
• Analyse how media consumption changes during large sporting events, as well as assess the advertising potential of these events;
• Compare identified consumer profiles in relation to different media sources.

Data collection methods
We used the following qualitative and quantitative data collection methods for the goals mentioned earlier:
• Online sample surveys that meet a sociodemographic portrait of the Russian population (1,600 respondents);
• Three focus groups with participants from six age groups (20 to 55-year-olds).

Sampling
Multistage and stratified sample representative of the Russian population according to gender, age and type of population centre – 1,600 persons, 9 Federal districts, 46 regions, and at least 110 population centres.

According to FOMnibus, Internet penetration among Russians aged over 18 was 70% in summer 2017.
Key findings

Media consumption patterns

In 2015–17 average\(^1\) audience reach in Russia continued at 55%.

- Russian youngsters aged 16–19 have become more active readers.
  - Printed books: 29% in 2016, 42% in 2017.

- St. Petersburg dwellers show a higher preference for E-inks, rather than printing inks.
  - Printed books: 41% in 2016, 63% in 2017.

- Russians with children have become more active cinemagoers.

Media consumption developments

Overall, media usage\(^2\) slowed down from 8% down to 5% over 2015–2017.

- Growth in media usage\(^2\) over 2015–2017:

- Decrease in media usage\(^2\) over 2015–2017:


Media sources

The Internet is the main source of news in Russia.

- Top three media sources:

- Top three information sources as ranked by trust:
  - TV: 30% in 2017.

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\(^1\) Average audience for 9 media channels under consideration

\(^2\) Based on the media usage index (proportion of those who indicated higher usage minus the proportion of those who indicated lower usage)
Key findings

Technology dimension

The year 2017 has seen usage index for messengers grow by 9 pp

<table>
<thead>
<tr>
<th>Mobile devices going smarter¹</th>
<th>Smartphone</th>
<th>77% → 83%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A mobile device</td>
<td>57% → 47%</td>
</tr>
</tbody>
</table>

Growth in the usage of the functionality offered by smartphones²

<table>
<thead>
<tr>
<th>Messengers</th>
<th>+24% 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile calls</td>
<td>+24% 2017</td>
</tr>
<tr>
<td>Social network apps</td>
<td>+14% 2017</td>
</tr>
<tr>
<td>Internet calls</td>
<td>+5% 2017</td>
</tr>
</tbody>
</table>

The age categories demonstrating the strongest growth in smartphone usage³

<table>
<thead>
<tr>
<th>Age category</th>
<th>16 to 19 years</th>
<th>70% → 92%</th>
</tr>
</thead>
<tbody>
<tr>
<td>+65 years</td>
<td>35% → 54%</td>
<td></td>
</tr>
</tbody>
</table>

Russian youngsters aged 16–19 have become more careful in selecting new gadgets.

The news about Telegram facing a blocking in Russia has resulted in Russians starting to use this messenger more actively, up 9%.

Online purchases

2017 saw online purchases grow by 6 pp

<table>
<thead>
<tr>
<th>Top-5 product categories purchased online⁴</th>
<th>Top-5 online advertising sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video games, films and software</td>
<td>Yandex Click-through rate</td>
</tr>
<tr>
<td>Electronics</td>
<td>VKontakte 48% 2017</td>
</tr>
<tr>
<td>Home appliances</td>
<td>BK 33% 2017</td>
</tr>
<tr>
<td>Clothes</td>
<td>Google 28% 2017</td>
</tr>
<tr>
<td>Products and toys for children</td>
<td>Odnoklassniki 25% 2017</td>
</tr>
<tr>
<td>Furs</td>
<td>OK 15% 2017</td>
</tr>
</tbody>
</table>

¹ Based on the usage index: [proportion of those who own and use a device minus proportion of those who own a device without using it]
² The feature usage index: [proportion of those who have indicated a more frequent use minus the proportion of those who have indicated a less frequent use]
³ Consumers who purchase new gadgets as soon as these appear on the market
⁴ Proportion of the respondents who generally shop online by product category
Key findings

Advertising

A decrease in perceived usefulness of advertising creates a major barrier to the awareness of advertising\(^1\), with the usefulness index down 8 pp over the last two years.

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Change 2017 Compared to 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>+6 pp</td>
</tr>
<tr>
<td>Internet</td>
<td>+4 pp</td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>-9 pp</td>
</tr>
</tbody>
</table>

Overall, perceived usefulness and tolerance for online advertising is down 35 pp and 14 pp over two years, respectively.

Russians have the most negative perception of mobile, e-mail and phone advertising.

\(^1\) Perceived advertising usefulness: [proportion of those who found useful information in advertisements minus the proportion of those who did not find such]

\(^2\) According to the advertising tolerance index: [proportion of those favouring advertising minus the proportion of those who disapprove]

2017 FIFA Confederations Cup

42% Russians followed the 2017 FIFA Confederations Cup.

Their media consumption for this period increased 2-fold

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Change 2017 Compared to 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>+52%</td>
</tr>
<tr>
<td>Internet</td>
<td>+31%</td>
</tr>
<tr>
<td>Radio</td>
<td>+8%</td>
</tr>
</tbody>
</table>

The overall advertising awareness index\(^3\) for sporting events is 41%.

Outdoor advertising on stadium premises and outside the premises

60% 2017

Advertising on stadium display boards during halftime

56% 2017

Advertising in dedicated mobile apps

49% 2017

Advertising at sports clubs/bars and as part of non-sporting events

48% 2017

Brand advertising during the 2017 FIFA Confederations Cup could potentially increase brand awareness\(^4\) by almost 25%.

\(^3\) The advertising awareness index: [proportion of those who noted ads minus the proportion of those who paid no attention]

\(^4\) Based on the condition that a county-wide brand awareness does not exceed 65%
Media consumption by category

Which of the following have you used or performed the last two weeks (percentage)?

<table>
<thead>
<tr>
<th>Media Consumption</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>100*</td>
<td>100*</td>
<td>100*</td>
</tr>
<tr>
<td>Television</td>
<td>92</td>
<td>92</td>
<td>94</td>
</tr>
<tr>
<td>Radio</td>
<td>62</td>
<td>58</td>
<td>61</td>
</tr>
<tr>
<td>Printed media</td>
<td>50</td>
<td>52</td>
<td>57</td>
</tr>
<tr>
<td>Video games</td>
<td>54</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td>Printed books</td>
<td>45</td>
<td>41</td>
<td>44</td>
</tr>
<tr>
<td>Electronic books</td>
<td>42</td>
<td>39</td>
<td>44</td>
</tr>
<tr>
<td>Cinema</td>
<td>36</td>
<td>33</td>
<td>37</td>
</tr>
<tr>
<td>Sporting events</td>
<td>18</td>
<td>13</td>
<td>16</td>
</tr>
<tr>
<td>Theatre</td>
<td>15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This result is due to the data collection method (online survey).

Trends
In 2017, average audience reach in Russia generally remained at 55%, up 1 pp from last year.

The most notable changes over the year include an increase in the consumption of radio and printed books (up 4 pp) and a decrease in the consumption of video games (down 4 pp).

Books

Patterns identified in 2017
Overall, printed books are more popular with women (49%), Russians aged 50–54 (53%) and city dwellers in Moscow (56%) and St. Petersburg (63%).

The least active electronic book users are those occupying the opposite ends of the age spectrum: youngsters aged 16–19 (35%) and people over 65 (33%).

Every second city dweller in Moscow (52%) and cities with a population over one million (48%) other than St. Petersburg uses electronic books, which is the highest rate for Russia.

Changes in media consumption
Growth in printed book consumption is generally seen among men and Russians aged 16–19. These two groups increased by 7 pp and 13 pp over the year, reaching 40% and 42%, respectively.


St. Petersburg is seeing the trend of printed books replacing electronic books, with the consumption of electronic books down by 9 pp and printed books up by 22 pp.

Do you read books?

“...I just cannot read electronic books. I need something tangible to leaf through.”
Focus group (aged 45–55)

“A beautifully designed book printed on high-quality paper is a pleasure for your fingers. I think paper books are better than electronic ones when it comes to a live dialogue with a book. I read books at least once a day.”
Focus group (aged 30–40)
Video games

Patterns identified in 2017
Unlike women, men play video games more often (+14 pp), with Russians aged 16–24 being the most active gamers (62%).

Changes in media consumption
This year has seen Russians aged 35–44 and 60–64 go to concerts and theaters more frequently (+6 pp).

Television

Patterns identified in 2017
Television is the least popular media among youngsters aged 16–19 and 20–24 (81% and 83%, respectively).

Changes in media consumption
The TV viewership has transformed significantly over the year, with the youngest group aged 16–19 becoming more active TV viewers (+13 pp) while the group aged over 65 is now watching less TV (–6 pp).

Printed media

Patterns identified in 2017
The consumption of printed media continues to decrease, dropping down by 7 pp over the two years. While the appeal of this media source is lowest among the youngsters aged 16–19 and 20–24 (27% and 33%, respectively), it is almost twice as high among Russians over 30 (50–57%).

Changes in media consumption
Printed media in Moscow has seen its popularity drop by 4% while up by 9% for St. Petersburg.

Cultural and sporting events

Patterns identified in 2017
Theaters and concerts have the lowest popularity among youngsters aged 16–24 (6–7%). Russians with a bachelor’s or master’s degree are twice as active when it comes to visiting cultural events — 9% and 18%, respectively.

Changes in media consumption
Men are far more active in visiting sporting events (+8 pp), with people aged 25–39 representing the most active visitors (23–24%).

Patterns identified in 2017
Seventy percent of employed Russians are radio listeners while only 50% of unemployed Russians are radio listeners.

Changes in media consumption
St. Petersburg and Moscow have seen significant annual growth in the number of radio listeners. This figure has reached 76% (+9 pp) for St. Petersburg and 80% (+16 pp) for Moscow.

Radio

Patterns identified in 2017
“Just cannot do without Komsomolskaya Pravda [a daily Russian tabloid]. Have been their reader since time I was a child. I am very conservative in this regard. It has become part of my life. I may not quite like it now, but I still make sure to purchase it.”
Focus group (aged 45–55)

Patterns identified in 2017
“I rarely turn on live radio. I generally prefer podcasts to get what I need.”
Focus group (aged 45–55)

Do you read printed media?

Do you listen to the radio?

"With my busy daily schedule, I often have to go to the website of Echo Moskvy [Echo of Moscow, a Moscow-based radio station] to listen to what I have missed. What is more: now you can also watch this content. I have my favourite characters and radio shows I would not miss. Even if it’s five days later, I will still make sure to catch them."
Focus group (aged 45–55)
Russians as media users

1. Would you describe yourself as an active media user who watches TV, reads printed and electronic media, listens to the radio and browses the Internet on a regular basis? Please select what applies to you best.

Yes, I am an active media user who shares news with friends / colleagues / acquaintances when communicating face to face or online (social networks, blogs, online fora, etc.)

Yes, I am an active media user. However, I prefer sharing news with friends / colleagues / acquaintances when online (social networks, blogs, online forums, etc.)

Yes, I am an active media user. However, I do not usually discuss or share news with friends / colleagues / acquaintances when online.

**Trends**

In 2017, the share of Russians who perceive themselves as active media users has gone down by 3 pp, reaching 84%. The majority of this group (40% of the sample) is represented by those who share news and information when using the Internet or communicating face to face. Despite the widespread trend of consuming more media content online, the share of those who prefer online communication to face-to-face contact remains rather low, at 9%.

**Highlights**

Elderly Russians prefer face-to-face contact rather than the Internet (online) when sharing news. It is particularly true for Russians aged 60–64 (43%).

Even though youngsters aged 16–19 are slightly more active media users when it comes to sharing news on the Internet (+4 pp), the share of this group has remained unchanged from the last year (13%).

Russians aged 55–59 and over 65 are the least inclined to share news over the Internet or during face-to-face contact (26% and 29%, respectively).

2. Are your family members active media users?

“Even though he is 68, my grandfather is a super active user, registered with every social network in existence, he visits them all, and he is a daily frequenter at YouTube. I would say that as a pensioner, he spends more time [online] than me.”

“[It seems that time is not so far off when I have to come to parents for advice about Internet.] Focus group (aged 20–30)

3. Do you share news you read?

“I read [content]. I discuss it. When reading something I cannot help sharing or discussing it. Can’t imagine it any other way.”

“ Mostly I just read stuff, it is rarely that I share what I read. Of course, I do discuss what I read with my colleagues or my family. I’m past the time when I felt the urge to share news with people in a social network.”

“I read news without sharing them, don’t feel like doing it.”

Focus group (aged 20–30)
### Media usage during the day

#### What is your preferred type of media?

<table>
<thead>
<tr>
<th>Time</th>
<th>TV</th>
<th>Radio</th>
<th>Internet</th>
<th>Electronic books</th>
<th>Printed media</th>
<th>Printed books</th>
<th>Video games</th>
<th>Nothing from mentioned above</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On work days</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6am to 9am</td>
<td>20%</td>
<td>17%</td>
<td>20%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>28%</td>
</tr>
<tr>
<td>9am to 12pm</td>
<td>10%</td>
<td>16%</td>
<td>43%</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>12pm to 6pm</td>
<td>8%</td>
<td>10%</td>
<td>52%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>6pm to 9pm</td>
<td>29%</td>
<td>5%</td>
<td>37%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>9pm to midnight</td>
<td>30%</td>
<td>3%</td>
<td>31%</td>
<td>10%</td>
<td>4%</td>
<td>8%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Midnight to 6am</td>
<td>5%</td>
<td>3%</td>
<td>13%</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
<td>5%</td>
<td>63%</td>
</tr>
<tr>
<td><strong>On weekends</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6am to 9am</td>
<td>20%</td>
<td>9%</td>
<td>15%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>50%</td>
</tr>
<tr>
<td>9am to 12pm</td>
<td>26%</td>
<td>11%</td>
<td>33%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>16%</td>
</tr>
<tr>
<td>12pm to 6pm</td>
<td>18%</td>
<td>6%</td>
<td>46%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>6pm to 9pm</td>
<td>26%</td>
<td>4%</td>
<td>39%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>9pm to midnight</td>
<td>32%</td>
<td>2%</td>
<td>33%</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Midnight to 6am</td>
<td>6%</td>
<td>2%</td>
<td>15%</td>
<td>3%</td>
<td>1%</td>
<td>5%</td>
<td>4%</td>
<td>63%</td>
</tr>
</tbody>
</table>

The Internet is a dominant media channel on work days and during weekends: the usage rate is at least 13–15% even during night and morning hours, running from midnight to 6am.

It is only from 6am to 9am that television surpasses the Internet in terms of usage rate, returning to a minimum level during the day and gradually reaching a peak in usage from 6pm to midnight (26–32%).

The most active use of radio is from 6am to midday on work days and during weekends. For printed media, the peak usage period runs from 9am to 6pm on work days while it starts later during weekends, running from 12pm to 12am.

Pastime activities (video games and electronic/printed books) more often take place in the evening from 6 pm until midnight.

The most active media consumption generally occurs from 6pm to midnight, with only 4–8% of respondents pointing out that they do not access any media content during this period.

#### How is your media consumption on work days different from that during weekends?

“On work days, I’m 99% sure that it would be the Internet, television and radio for me. I rarely use anything on weekends.”

“My media consumption pace does not really change much. The Internet is always part of it. The only thing that changes on weekends is the information I can go looking for: it can be more work-related, or more about social networking or entertainment, i.e. books, TV series or music.”

“I always read in bed. I simply cannot go to sleep without a book.”

**Focus group (aged 30–40)**
Media consumption practices

Television

- I turn on the TV to watch a program. If there is nothing interesting, I just leave it in the background and/or watch a TV program that seems to be the most interesting.

- I use TV as a background.

- I only watch TV when I have company.

Internet

- I often go online for longer periods.

- I rarely go online and do so for longer periods.

- I rarely go online and do so for shorter periods.

Radio

- I listen to the radio while driving.

- I listen to the radio while going for a walk.

- I listen to the radio while going for a walk.

Printed media

- I read freely available printed media.

- I sporadically purchase certain printed media.

- While not purchasing printed media myself, I read what my friends buy.

- I purchase certain printed media on a regular basis.

- I purchase printed media as a pastime.

- I have subscriptions to certain printed media.
Changes in media consumption in 2015–2017

**How would you describe the change in your media consumption rate over the last three years?**

<table>
<thead>
<tr>
<th>Media Consumption Category</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>66</td>
<td>62</td>
<td>61</td>
<td>+ 5 pp</td>
</tr>
<tr>
<td>Electronic books</td>
<td>29</td>
<td>31</td>
<td>31</td>
<td>- 2 pp</td>
</tr>
<tr>
<td>Sporting events</td>
<td>10 n.a.</td>
<td>n.a.</td>
<td>n.a.</td>
<td>n.a.</td>
</tr>
<tr>
<td>Video games</td>
<td>6</td>
<td>4</td>
<td>10</td>
<td>- 4 pp</td>
</tr>
<tr>
<td>Average index</td>
<td>5</td>
<td>6</td>
<td>8</td>
<td>- 3 pp</td>
</tr>
</tbody>
</table>

**Higher usage**

- Cinema: 3 to 0, 7 pp
- Theaters/concerts: -2 to 0, 7 pp
- Radio: -3 to -4, 1 pp
- Television: -11 to -8, -5 pp
- Printed books: -18 to -16, -2 pp
- Printed media: -22 to -24, -2 pp

**Lower usage**

- Cinema: 3 to 0, -7 pp
- Theaters/concerts: 0 to 3 pp
- Radio: 3 to 0, -7 pp
- Television: 0 to -5, -5 pp
- Printed books: 0 to -9, -9 pp
- Printed media: 0 to -7, -5 pp

The media usage index is calculated as follows: [the proportion of those who indicated higher usage minus the proportion of those who indicated lower usage]

**Trends**

According to the respondents, the last three years have seen a growth in the usage of the Internet (the usage index of 66%), electronic books (a net balance of 29%) and sporting events (a net balance of 10%).

At the same time, the respondents perceive a significant decline in the usage of printed books and media, as compared to 2015, with the media usage indices of –18% and –22%, respectively.

However, our historical comparative analysis shows that the media usage indices generally remain the same.

**How would you describe your media consumption?**

- “I’m a really active onliner. /../ In short, I spend every free minute online whenever I can.”
- “Staying online from morning till night. /…/ News and more news, from dusk to dawn.”
- “I spend five to six hours on the Internet each day. ... Three hours when at work plus three hours when travelling home or when home, or at night.”
- “Yes, I use the Internet, and the more I go online the more I do it. /…/ Once out of bed I grab my smartphone to go through my online routine: reading news at mail.ru or surfing for what I’m interested in at the moment. /…/Like my husband says : “She went online and forgot to come back.”
- “The pace of everyday life has changed. Of course, one may want to read some classics like Dostoyevsky or Balzac, but it is so out of step and bears no relevance because there may be situations when you have to make decisions within a split second. So, I don’t find it of much use any longer. /…/ When it comes to reading, you can just search Google or Yandex for any book you need at the precise moment, or you can read a separate chapter and be done with it.”

Focus group (aged 45–55)
Media consumption in Russia – 2017

Highlights

**Books**

While the usage index for electronic books has reached 29%, reflecting an increase in time spent on e-reading during 2015–2017, printed books have seen a decline over the same period (–18%).

Youngsters aged 20–24 (+13 pp above the average) and Russians aged 55–64 (+8 to +11 pp) more often tend to indicate more active use of electronic books.

Russians aged 40–54 much more often mention reading printed books less frequently, with the usage index of –11 pp to –13 pp below the average. At the same time, youngsters aged 20–24 indicate spending more time on printed books (+20 pp).

**Printed media**

The usage index for printed media is lowest among the other media channels (–22%). The popularity of this media has been declining across all population groups.

The strongest decline of printed media is seen among those living in Moscow and St. Petersburg (–10 pp) when compared to those living in other cities with a population over one million.

**Television**

In 2017, television sees a negative usage index of –11%. This reflects a decline in the interest for this media among the respondents.

Unlike in 2015, respondents from the student population are now spending significantly less time in front of the TV. With a media usage index of -38%, they stand out among respondents from the other groups.

"I do not have a TV-set. It is not that I cannot allow it, it is just that I don’t really need it.”

"It may be so that my telly has died. I’m afraid that if I were to turn it on it would explode because of dust.”

"A TV-set is only needed for films: downloading and watching films in widescreen is the only use I see for it.”

**Focus group (aged 20–30)**

"Do you watch television?"

"I do not have a TV-set. It is not that I cannot allow it. It is just that I don’t really need it.”

"It may be so that my telly has died. I’m afraid that if I were to turn it on it would explode because of dust.”

"A TV-set is only needed for films: downloading and watching films in widescreen is the only use I see for it.”

---

Internet

Internet has the highest media usage index (66%) among the media channels. The youngest age group (16–19 year olds) accounts for the highest YoY increase in Internet usage (+21 pp). With the Internet being a dominating media channel for this age group, this corresponds to the trend when other media channels are almost completely ousted from the media space of this group.

**Printed media**

The usage index for printed media is lowest among the other media channels (–22%). The popularity of this media has been declining across all population groups.

The strongest decline of printed media is seen among those living in Moscow and St. Petersburg (–10 pp) when compared to those living in other cities with a population over one million.
Information content and usage patterns
News sources

The youngest respondents (16–24-year-olds) name the Internet as a key source of information, with social networks/blogs coming first (70%) and official websites coming second (52%). These respondents also more often indicate sharing news during personal communication (31%).

Russians over 25 indicate the Internet as their key source of information while reporting more preference for official websites that offer news and analysis (66–83%).

The importance of television as a key source of information tends to increase when moving from the youngest Russians (16–24-year-olds) (32%) to the group over 65 years of age (80%).

"Facebook, which includes my feed and the likes from my friends."

"Yandex.Novosti, primarily. It is also Facebook and other news in addition to politics. Apart from personalised news, there are a lot of culture or other news, depending on what you are subscribed to."

Focus group (aged 20–30)

"Internet is the key source of information for me. Television is less important."

"As I have my breakfast I go to Channel One for news, via my tablet; it is also Pravo.ru, Consultant; Yandex.Novosti, but I only skim through the news headlines."

Focus group (aged 30–40)

"I use Yandex.Zen for news. It is a great news aggregator; I’ve set it up to get news from 50 various sources, including magazines on medicine, politics, economics and sports, with updates every 15 minutes."

Focus group (aged 45–55)
Media source ranking by trust level

Trends
The year 2017 has seen a marked annual growth in trust for official websites and providers of online news and analysis (+5 pp). These media sources are leading as the most trusted.

The annual growth in trust for official websites is highest in Moscow and St. Petersburg (+24 pp and 23 pp, respectively), including among the youngest group of 16–19-year-olds (+12 pp).

At the same time, the trust in television among Russians aged 16–19 and 20–24 has dropped (–11 pp and 8 pp, respectively).

Highlights

**Television**
A notably lower trust in television is demonstrated by students (–16 pp below the average).

At the same time, a higher trust is reported by pensioners (37%).

**Online information**
Moscow and St. Petersburg show the highest trust in information at official websites, with almost every second respondent from these cities mentioning it (48–49%).

At the same time, the trust in television among Russians aged 16–19 and 20–24 has dropped (–11 pp and 8 pp, respectively).

“Today, there are so many information sources. I read and watch a lot. You can come across alternative news presenting totally diverse opinions, e.g. Dozhd vs. Channel One. In addition, I really like watching analytical programmes by independent bloggers or political analysts. This way I can develop my own view of a particular situation.”

Focus group (aged 20–30)

### If different media sources portray the same event differently, then which source will you believe? Which media source do you trust most?

<table>
<thead>
<tr>
<th>Media Source</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online news and analysis, official websites</td>
<td>35</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>TV</td>
<td>29</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Social networks and blogs</td>
<td>14</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>The opinion of others</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Radio</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Newspapers</td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Magazines</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Trends

**Online news and analysis, official websites**
- 2015: 35
- 2016: 40
- 2017: 40

**TV**
- 2015: 29
- 2016: 30
- 2017: 30

**Social networks and blogs**
- 2015: 14
- 2016: 11
- 2017: 11

**The opinion of others**
- 2015: 2
- 2016: 3
- 2017: 3

**Radio**
- 2015: 1
- 2016: 1
- 2017: 1

**Newspapers**
- 2015: 1
- 2016: 3
- 2017: 3

**Magazines**
- 2015: 1
- 2016: 1
- 2017: 1

2017 2016 2015
Attitude towards the mass media:  
Russian or foreign source?

Is it important for you whether the information comes from a foreign or Russian source?

Trends
Even with most Russians (64%) indicating the importance of where information comes from, the share of these respondents continues to decline for the second consecutive year (–6 pp).

- Fifty-eight percent prefer information from Russian sources. This is especially notable with television, with 67% of Russians preferring local channels.
- Only 6% indicated a preference for foreign sources. This is most evident when it comes to selecting official news and analysis websites.
- Russians demonstrate the most neutral attitudes about selecting magazines or listening to the opinion of others: 41–42% do not have any preferences for whether this information comes from foreign or Russian sources.

Highlights
Lower loyalty for Russian sources is reported by respondents from St. Petersburg (–9 pp below the average) and youngsters aged 16–19 and 20–24 (–13 pp and –17 pp, respectively), with the 16–19 age group showing a slightly stronger preference for foreign sources (+6 pp). This is particularly clear for radio and television where the preference for foreign sources is stronger (+10 pp).

“I have a clear understanding of how Russian news are cut and censored. And it goes the same for European or Western news with their heavy censorship. So, saying that they have free media and we don’t would be a lie.”

“As for politics, you can read one thing in Russian sources and then it is quite the opposite in European media. But I believe that the truth sits somewhere in the middle. /.../ Of course, unlike coverage in Europe, national news feel more local. That is why it is difficult at times to stay unbiased.”

Focus group (aged 20–30)
The most popular segments by media

1. Which segments do you prefer? How often do you access them? How much time do you spend each day listening/watching/reading the segments you have specified?

<table>
<thead>
<tr>
<th>Media</th>
<th>Compared to 2016</th>
<th>Compared to 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Movies</td>
<td>3.5 times¹</td>
<td>2 hr 03 min²</td>
</tr>
<tr>
<td>TV-series</td>
<td>2.6 times¹</td>
<td>1 hr 54 min²</td>
</tr>
<tr>
<td>General news (daily news)</td>
<td>4.3 times¹</td>
<td>60 min²</td>
</tr>
<tr>
<td>Radio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Russian music</td>
<td>3.1 times¹</td>
<td>1 hr 05 min²</td>
</tr>
<tr>
<td>Foreign music</td>
<td>2.9 times¹</td>
<td>1 hr 03 min²</td>
</tr>
<tr>
<td>Information programmes (news, weather)</td>
<td>3.4 times¹</td>
<td>36 min²</td>
</tr>
<tr>
<td>Printed media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General news</td>
<td>2.3 times¹</td>
<td>27 min²</td>
</tr>
<tr>
<td>Popular science and education</td>
<td>1.5 times¹</td>
<td>34 min²</td>
</tr>
<tr>
<td>Political and social news</td>
<td>1.6 times¹</td>
<td>32 min²</td>
</tr>
</tbody>
</table>

Compared to women, men show a notably stronger preference for radio programmes that offer general news or feature political, economic and cultural topics, as well as comedy radio shows.

Russians over 40 demonstrate a notably stronger preference for movies and programmes that feature general or political news while youngsters 16–34 give more preference to entertainment and music programmes. Respondents from the middle age group (30–54-year-olds) reported more of a preference for popular science programmes.

The highest interest for general news was reported by respondents from St. Petersburg where the year 2017 has seen the strongest growth in the popularity of printed media.

2. What kind of information from media sources do you lack?

“I think that people lack information on organisations and their rights /…/ They seem not to know pretty basic things when it comes to where to file your documents or claims, or where to take your issue.”

“I lack information on social benefits”.

“It seems to me that there is a lack of information about healthy lifestyle.” Focus group (aged 30–40)

3. Introduction
4. Methodology
5. Key findings
6. Media consumption in Russia
7. Information content and usage patterns
8. News sources
9. Media source ranking by trust level
10. Attitude towards the mass media: Russian or foreign source?
11. The most popular segments by media
12. Frequency of Internet visits
13. Media consumption: technology dimension
14. Attitudes towards advertising
15. Online purchases
16. Media consumption during 2017 FIFA Confederations Cup
17. Media consumption in figures
18. Contacts
Frequency of Internet visits

1. **For what purpose do you use the Internet? How often?**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage of users</th>
<th>Change from 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>I search for information, including information I need for work, education or private reasons</td>
<td>83%</td>
<td>+2 pp</td>
</tr>
<tr>
<td>I check for news on private pages on social networking sites</td>
<td>69%</td>
<td>0 pp</td>
</tr>
<tr>
<td>I use the Internet for informal communication</td>
<td>67%</td>
<td>+1 pp</td>
</tr>
<tr>
<td>I use the Internet for business/formal communication</td>
<td>65%</td>
<td>+3 pp</td>
</tr>
<tr>
<td>I read online news, newspapers, books, blogs and analytical magazines</td>
<td>59%</td>
<td>+9 pp</td>
</tr>
<tr>
<td>I watch movies and videos online</td>
<td>56%</td>
<td>0 pp</td>
</tr>
<tr>
<td>I listen to the radio and music online</td>
<td>53%</td>
<td>+3 pp</td>
</tr>
<tr>
<td>I make purchases online</td>
<td>49%</td>
<td>+6 pp</td>
</tr>
<tr>
<td>I download movies and videos</td>
<td>43%</td>
<td>-2 pp</td>
</tr>
<tr>
<td>I download music</td>
<td>42%</td>
<td>-2 pp</td>
</tr>
<tr>
<td>No specific purpose</td>
<td>41%</td>
<td>+1 pp</td>
</tr>
<tr>
<td>I download books</td>
<td>37%</td>
<td>0 pp</td>
</tr>
<tr>
<td>I only browse the web together with my friends/colleagues/acquaintances</td>
<td>10%</td>
<td>-1 pp</td>
</tr>
</tbody>
</table>

Respondents reported information and communication purposes as the most frequent use of the Internet. This year online news, magazines and blogs, as well as online purchases have seen significant growth in popularity: +9 pp and +6 pp, respectively.

At the same time, downloading movies and music has become a slightly less popular activity due to the increase in the consumption of content online.

2. **What resources do you access on the Internet?**

- "It is 80% YouTube and 20% things like Yandex, Novosti, VKontakte or Telegram. Anyway, video content is what I primarily consume."
  - Focus group (aged 20–30)

- "I think that Twitter is a real platform to use when you need to contact someone you know."  
  - Focus group (aged 20–30)

- "With Instagram, I have subscriptions to brands, singers, artists, my friends and acquaintances I'm most interested in. Plus news and interesting events around the city."
  - Focus group (aged 30–40)

- "I don't have much time for facebooks of this world but sometimes I have to go there and would get absorbed. In fact, have to limit myself."
  - Focus group (aged 45–55)
Trends
Social networks and photo/video hosting sites are mentioned among the most popular key resources. As perceived by respondents, the social network VKontakte and YouTube are leading in growth rates for visitor traffic, with every fifth respondent (19–20%) indicating a more frequent use for these resources.

Highlights
According to respondents, communicating with others and content viewing are the two main activities when visiting the social networks VKontakte, Odnoklassniki and Facebook (40–59%) while creating and discussing content come second (21–28%). Almost all of the respondents (88–89%) reported content viewing on YouTube and news websites, and almost half of the users (46%) specified that they are engaged in creating content on Instagram.

An interesting point to note is that apart from pure gaming (54%), video gamers also cite using video games to communicate with other gamers (45%).

Please select three key Internet resources you access the most frequently. What is the main purpose for accessing these resources? Compared to the previous year, which of the Internet resources listed below do you access more frequently? Which less frequently?

<table>
<thead>
<tr>
<th>Media source</th>
<th>Activity</th>
<th>Usage rate</th>
<th>Change over the year</th>
<th>Create content</th>
<th>Discuss content</th>
<th>View or use content</th>
<th>Communicate with other users</th>
</tr>
</thead>
<tbody>
<tr>
<td>VKontakte</td>
<td></td>
<td>69%</td>
<td>+20%</td>
<td>28%</td>
<td>25%</td>
<td>59%</td>
<td>51%</td>
</tr>
<tr>
<td>YouTube</td>
<td></td>
<td>56%</td>
<td>+19%</td>
<td>6%</td>
<td>12%</td>
<td>89%</td>
<td>5%</td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td></td>
<td>42%</td>
<td>–8%</td>
<td>23%</td>
<td>22%</td>
<td>53%</td>
<td>50%</td>
</tr>
<tr>
<td>News websites</td>
<td></td>
<td>40%</td>
<td>+9%</td>
<td>2%</td>
<td>10%</td>
<td>88%</td>
<td>5%</td>
</tr>
<tr>
<td>Facebook</td>
<td></td>
<td>27%</td>
<td>–7%</td>
<td>21%</td>
<td>26%</td>
<td>52%</td>
<td>40%</td>
</tr>
<tr>
<td>Instagram</td>
<td></td>
<td>17%</td>
<td>+8%</td>
<td>46%</td>
<td>27%</td>
<td>65%</td>
<td>19%</td>
</tr>
<tr>
<td>Online games</td>
<td></td>
<td>13%</td>
<td>–4%</td>
<td>8%</td>
<td>11%</td>
<td>54%</td>
<td>45%</td>
</tr>
<tr>
<td>Twitter</td>
<td></td>
<td>6%</td>
<td>–7%</td>
<td>27%</td>
<td>30%</td>
<td>58%</td>
<td>28%</td>
</tr>
<tr>
<td>Livejournal</td>
<td></td>
<td>4%</td>
<td>–2%</td>
<td>13%</td>
<td>16%</td>
<td>73%</td>
<td>18%</td>
</tr>
<tr>
<td>Moi Krug</td>
<td></td>
<td>3%</td>
<td>–4%</td>
<td>12%</td>
<td>15%</td>
<td>22%</td>
<td>56%</td>
</tr>
<tr>
<td>Stream</td>
<td></td>
<td>2%</td>
<td>–1%</td>
<td>16%</td>
<td>22%</td>
<td>63%</td>
<td>25%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td></td>
<td>2%</td>
<td>–3%</td>
<td>18%</td>
<td>18%</td>
<td>57%</td>
<td>39%</td>
</tr>
<tr>
<td>Periscope</td>
<td></td>
<td>1%</td>
<td>–1%</td>
<td>9%</td>
<td>27%</td>
<td>36%</td>
<td>27%</td>
</tr>
</tbody>
</table>

1 The Internet resource visit index is calculated using the formula: (proportion of those who began using a resource more often minus the proportion of those who began using a resource less often)
Technical aspect of media consumption

1. Introduction
2. Methodology
3. Key findings
4. Media consumption in Russia
5. Information content and usage patterns
6. Media consumption: technology dimension
   - Attitudes towards new gadgets
   - Russian household ownership of media devices
   - The use of smartphone features
   - Messengers
   - Access to media by connection type
7. Attitudes towards advertising
8. Online purchases
9. Media consumption during 2017 FIFA Confederations Cup
10. Media consumption in figures
11. Contacts
Attitudes towards new gadgets

Trends
In 2017, almost half of the respondents (45%) take a conservative approach when selecting a gadget, with 39% looking for proven devices and another 6% making a choice for gadgets to which there are no alternatives.

Even though there are only 5% of early adopters looking for the latest gadgets, every third Russian (30%) picks up the best product among new products as they appear on the market. Another 14% prefer purchasing new gadgets before these enter the mainstream.

Highlights
In 2017, youngsters aged 16–24 who are among gadget enthusiasts seem to have become more careful about what they purchase: the share of early adopters in this age group has decreased. At the same time, the share of respondents who prefer researching before buying (35–39%) a new gadget has increased significantly (+7 pp to +17 pp).

Employed Russians and 25-39-year-olds represent the largest share of early adopters (7–10%).

Russians over 45 are more conservative as they prefer well-established, traditional devices (49–56%). The 60+ age group has a higher share of those who do not make purchases independently (+8–9 pp above the average).

“’I don’t feel any drive to go after novelties any longer.’
Focus group (aged 30–40)"

“I would wait a bit before we purchase something. Because we want to hear comments to see how a product performs, as we do so prices also settle down.”
Focus group (aged 45–55)
Russian household ownership of media devices

Trends
The top three common devices in Russian households are:

- **1st place – TV-sets (97%).** Nearly all TV-set owners watch television. The usage index\(^1\) is at 89%.
- **2nd place – Smartphones (87%).** These devices have become more widespread over the last year from 81% to 87%. The usage index\(^1\) is at 83%.
- **Laptops (79%) and PCs (78%).** The usage index\(^1\) is at 70% and 67%, respectively.

Mobile phones have seen the strongest decrease in the usage index (–10 pp) as they are driven out of the market by smartphones (+7 pp).

Highlights
The youngest and oldest age groups seem to give the strongest boost to the popularity of smartphones. This year the smartphone usage index has increased by 22 pp to 79% for the 16–19 age group and by 19 pp to 54% for the 65+ age group.

The proportion of smartphone users in small towns and medium cities has also grown by 7–10 pp to 80-83%, almost reaching the smartphone levels in Moscow, St. Petersburg and other large cities (85–87%).

This year St. Petersburg has seen an increase in radio usage, up by 21 pp.

---

\(^1\) The usage index = \[\text{proportion of those who own and use a device minus proportion of those who own a device without using it}\]
### Which devices do you use to watch television content? How often?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Average Days per Week</th>
<th>Average Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV-set</td>
<td>96%</td>
<td>5.5 days</td>
<td>2 hr 39 min</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>60%</td>
<td>2.8 days</td>
<td>2 hr 16 min</td>
</tr>
<tr>
<td>Smartphone</td>
<td>59%</td>
<td>3.1 days</td>
<td>2 hr 11 min</td>
</tr>
<tr>
<td>Laptop</td>
<td>59%</td>
<td>2.7 days</td>
<td>1 hr 59 min</td>
</tr>
<tr>
<td>Tablet</td>
<td>43%</td>
<td>1.6 days</td>
<td>1 hr 26 min</td>
</tr>
</tbody>
</table>

### Which devices do you use for surfing on the Internet? How often do you them?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Average Days per Week</th>
<th>Average Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>82%</td>
<td>4.6 days</td>
<td>2 hr 25 min</td>
</tr>
<tr>
<td>Laptop</td>
<td>75%</td>
<td>3.9 days</td>
<td>2 hr 53 min</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>71%</td>
<td>3.9 days</td>
<td>3 hr 10 min</td>
</tr>
<tr>
<td>Tablet</td>
<td>54%</td>
<td>2.2 days</td>
<td>1 hr 35 min</td>
</tr>
<tr>
<td>TV-set</td>
<td>46%</td>
<td>2.0 days</td>
<td>2 hr 00 min</td>
</tr>
</tbody>
</table>

### Watching TV online:

- “I don’t really understand why a person would need a TV-set. You can go on the Internet at any time to watch the same things you would watch on TV. Today, every TV channel has a presence on YouTube. You can access recorded programmes.”
  - Focus group (aged 30–40)

- “Moscow 24 is the only channel I watch regularly. I view it online in the morning as I finish my coffee and prepare to leave for work. I use my laptop for that.”
  - Focus group (aged 20–30)
The use of smartphone features

Please specify which smartphone features you use more often and which ones less often.

<table>
<thead>
<tr>
<th>Feature</th>
<th>More frequent use</th>
<th>Less frequent use</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile calls</td>
<td>38</td>
<td>15</td>
<td>+24</td>
</tr>
<tr>
<td>Messengers (WhatsApp, Viber, Telegram)</td>
<td>37</td>
<td>13</td>
<td>+24</td>
</tr>
<tr>
<td>Social network apps</td>
<td>27</td>
<td>13</td>
<td>+14</td>
</tr>
<tr>
<td>Internet calls (Skype, Viber, WhatsApp)</td>
<td>24</td>
<td>19</td>
<td>+5</td>
</tr>
<tr>
<td>Messages</td>
<td>13</td>
<td>32</td>
<td>-19</td>
</tr>
<tr>
<td>Video games</td>
<td>5</td>
<td>29</td>
<td>-24</td>
</tr>
</tbody>
</table>

More frequent use
Less frequent use
The usage index: [proportion of those who have indicated a more frequent use minus the proportion of those who have indicated a less frequent use]

Trends
Mobile calls remain the most popular use for smartphones: 38% of respondents have indicated that they have grown to use this feature more often in 2017.

At the same time, while messengers have demonstrated the highest growth in use over the year, with messenger usage up by 9 pp to +24 percent, video games and SMS messaging are increasingly declining in use, with almost every third Russian indicating less frequent use.

Highlights
The popularity of messengers has seen a notably stronger growth among women (+16 pp) compared to men, as well as among Russians aged 25–34 (+10 to +17 pp above the average) and those living in the Far Eastern Federal District (+26 pp).

While younger Russians make mobile calls less frequently, they make more active use of their smartphones to access social networks, with:
- students having the lowest usage index for mobile calls (0%).
- Youngsters aged 16–34 also tend to make Internet calls less frequently: the usage indices run from –3% to –15% across the age groups.
- At the same time, Russians above 35 have grown to make Internet calls more frequently, with the usage index varying from 4% to 26%.
- The survey has also identified the trend where the smartphone usage index for social networks decreases with the respondent’s age. This index is at +67% and 45% for the 16–19 and 20–24 age groups and –17% for Russians over 65.

What smartphone features do you use?
"These are mainly mobile calls. But it is Skype or Telegram I use for long-distance or international calls."
Focus group (aged 20–30)

"It is either WhatsApp or Viber. I use both to communicate with friends, colleagues or suppliers."
Focus group (aged 30–40)
As smartphones, along with messengers, continue to grow in popularity, we have asked respondents to share with us what messaging apps they have and which of these they use most frequently.

**Trends**
Almost all of the respondents (91%) reported the use of messengers.

In Russia, WhatsApp, Viber and Skype enjoy the highest popularity (65%, 56% and 52%, respectively), with more than a half of respondents reporting having these apps.

However, their usage indices vary significantly. Three out of four respondents who have WhatsApp on their devices use the app actively, while with Skype, only every third respondent reported this.

**Highlights**
People living in the Far Eastern Federal District and the Northern Caucasian Federal District prefer WhatsApp over Viber (+65 pp and +46 pp, respectively).

The summer 2017 saw Telegram facing the threat of being blocked in Russia. However, this had no impact on most Russians’ attitudes towards the messenger (71%), with 19% indicating that the story with Telegram encouraged them to use the messenger more frequently and only 10% – less frequently.

**Which messengers do you prefer?**

“I prefer Viber for its bright design and stickers — all these nice little frills.”
Focus group (aged 30–40)

“It is Telegram with its emoticons because I do express my emotions in pictures.”
Focus group (aged 45–55)
### Access to media by connection type

#### Internet connection

- **Dedicated line (direct cable Internet connection):**
  - 2017: 48
  - 2016: 46
  - 2015: 52

- **Modem connection:**
  - 2017: 29
  - 2016: 27
  - 2015: 31

- **ADSL-connection:**
  - 2017: 13
  - 2016: 14
  - 2015: 31

- **Wireless Internet:**
  - 2017: 47
  - 2016: 47
  - 2015: 44

#### TV connection

- **Online TV:** This is the most used type of connection in the Urals Federal District (48%).
  - 2017: 36
  - 2016: 35
  - 2015: 37

- **Individual cable antenna:** This is the most used type of connection in the Volga Federal District (48%) and the Siberian Federal District (48%).
  - 2017: 35
  - 2016: 35
  - 2015: 38

- **General antenna:** This is the most used type of connection in the Northwestern Federal District (44%) and the Central Federal District (41%).
  - 2017: 28
  - 2016: 28
  - 2015: 30

- **Satellite TV:** This is the most used type of connection in the North Caucasian Federal District (45%) and the Southern Federal District (47%).
  - 2017: 26
  - 2016: 24
  - 2015: 25

#### Radio connection

- **Device in car:**
  - 2017: 36
  - 2016: 36
  - 2015: 39

- **Household device:**
  - 2017: 25
  - 2016: 23
  - 2015: 20

- **Internet (PC users):**
  - 2017: 15
  - 2016: 9
  - 2015: 13

- **Mobile device:**
  - 2017: 11
  - 2016: 11
  - 2015: 13

- **Portable player:**
  - 2017: 4
  - 2016: 4
  - 2015: 4
Attitudes towards advertising
Advertising tolerance and perceived usefulness of advertising media

What is your attitude towards various advertising media?
Have you had a positive experience with advertising as a source of useful information?

Advertising tolerance
Generally, Russians demonstrate positive sentiment for outdoor advertising, with an advertising tolerance index of +13%. Ads in printed media and on TV, as well as sponsorship-based advertising, do not result in pronounced negative sentiment.

Radio and online ads are met with moderately disapproving sentiment (–17% to –28%) that turns into strongly negative when it comes to cold calling, mobile and e-mail advertising (–40% to –60%).

Advertising: Perceived usefulness
As regards perceived usefulness, TV advertising was rated highest (17%), with most Russians indicating this source as the most useful.

The low rate assigned to sponsorship-based advertising is explained by the fact that this type of advertising is aimed at creating a positive image for a company, rather than being a source of practical information for consumers. Therefore, this rate should not be viewed in terms of perceived usefulness.

According to respondents, cold calls, mobile and e-mail ads can rarely serve as a source of useful information.

Mobile and e-mail advertising communications:
“I really hate mobile ads. This is one of the reasons why I have stopped using Viber.”

“These SMS ads drive me mad.”

“Now you can send e-mail ads to a spam folder. Once logged in, you just do a couple of clicks and delete 50 e-mails.”

Focus group (aged 20-30)

Cold calls:
“They get on my nerves like no other.”

“I have a long black list with thousands of phone numbers. It is because of cold calls.”

“Absolutely useless and at the wrong time. I never bother to listen.”

Focus group (aged 30-40)

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1 The advertising tolerance index: [proportion of those favouring advertising minus the proportion of those who disapprove]

2 The advertising usefulness is assessed based on the respondent experience with advertisements as a source of practical information: [proportion of those who found useful information in advertisements minus the proportion of those who did not].
Tolerance for various advertising media

What is your attitude towards various advertising media?

**Trends**

The overall tolerance index for the major advertising media remains unchanged from the previous year (-7%). At the same time, the tolerance for outdoor and TV advertising has seen a slight growth (+4 pp and +7 pp, respectively), while the tolerance for Internet advertising has decreased notably over the two years (-14 pp).

**Highlights**

The highest tolerance levels for advertising were indicated by youngsters aged 25–39 (with the average tolerance index at about 0%), women (-1%) and the respondents who live with their children (-4%). Russians over 55 demonstrated a perceivably lower tolerance for various advertising media, with the advertising tolerance index of -18 to -13 percent.

---

`What is your attitude towards advertising?`

- **Outdoor advertising**: 13 in 2017, 9 in 2016, n.a. in 2015, +4 pp
- **Printed advertising**: 2 in 2017, 3 in 2016, 6 in 2015, -4 pp
- **Average advertising tolerance level**: -7 in 2017, -7 in 2016, -9 in 2015, +2 pp
- **TV**: -10 in 2017, -16 in 2016, -17 in 2015, +7 pp
- **Radio advertising**: -17 in 2017, -17 in 2016, -17 in 2015, 0 pp
- **Internet**: -23 in 2017, -14 in 2016, -9 in 2015, -14 pp

---

`What is your attitude towards advertising?`

- "It looks like TV channels are flooded with endless advertising."
  - Focus group (aged 45–55)
- "As soon as a commercial break is there, I switch to another channel."
  - Focus group (aged 30–40)
- "Advertising as such is what gets on my nerves. It would pop up unexpectedly as I launch some video at YouTube or browse through Instagram."
  - Focus group (aged 45–55)
Trends
In 2017, the overall advertising usefulness as perceived by Russians has gone down, reaching −9%, which indicates that most Russians do not consider advertising to be a source of valuable information.

The decrease in perceived usefulness is strongest for Internet advertising (−35 pp over the two years). TV advertising demonstrates an opposite trend as it has been rated as the most useful in 2017.

Highlights
Unlike men, women consider advertising to be more useful (−7% and +6%, respectively), with outdoor and TV advertising representing the most vivid example where the difference in perceived usefulness is strongest (24 pp and 28 pp, respectively).

The perceived usefulness is lowest with Russians over 55, varying from −22% to −35%.

The perceived usefulness of Internet advertising is notably higher with youngsters aged 16–19 and 25–29 (+12 pp and +9 pp above the average, respectively). It particularly applies to advertising in social networks where the perceived usefulness is higher (+33 pp and +16 pp, respectively).

Have you had a positive experience with advertising as a source of useful information?

<table>
<thead>
<tr>
<th>Media Type</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>17</td>
<td>7</td>
<td>7</td>
<td>+10 pp</td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>−4</td>
<td>−7</td>
<td>n.a.</td>
<td>+3 pp</td>
</tr>
<tr>
<td>Average advertising</td>
<td>−9</td>
<td>−6</td>
<td>−1</td>
<td>−8 pp</td>
</tr>
<tr>
<td>Printed advertising</td>
<td>−9</td>
<td>−6</td>
<td>−1</td>
<td>−8 pp</td>
</tr>
<tr>
<td>Internet</td>
<td>−19</td>
<td>5</td>
<td>16</td>
<td>−35 pp</td>
</tr>
<tr>
<td>Radio advertising</td>
<td>−29</td>
<td>−28</td>
<td>−26</td>
<td>−3 pp</td>
</tr>
</tbody>
</table>
Based on the tolerance analysis, we have identified some notable changes in the tolerance for outdoor advertising in Moscow: although excessive mass advertising on city’s streets had provoked a strongly negative backlash from the residents several years ago, new restrictions aimed at reducing ad saturation have improved the situation to the point where outdoor ads are now seen as among the most tolerable media channels.

Changes in the attitudes towards online advertising are also to be mentioned in this context, with the online advertising tolerance and usefulness indices dropping down by 14 pps and 35 pps over the last two years, respectively. If the current pace continues, these indices will, in the course of a few years, reach levels associated with such formats as cold calling and mobile/e-mail advertising, which are perceived very negatively. Meanwhile, targeted advertising that reaches the audience at the right time could enable better ad content efficiency while reducing customer irritation.

Experts note a growth in negative attitudes towards Internet advertising, which is particularly due to a strong concentration and aggressiveness of ads. The result is that Internet users start installing adblocking apps. According to our survey, 30% of Russians use adblocking apps and another 13% are planning to do so. While only 11% of respondents have made a decision to remove ad blockers from their devices, 45% do not know what adblocking apps are.

Respondents on the measure limiting outdoor advertising in Moscow:
“Agree with it, 100%. Good things are easy to get used to.”

“Yes, absolutely. I fully support it. It feels like we have more air to breathe now that they have removed this rubbish [from the streets]. Before that, it was simply tiring to look at.”

“It is most welcome. I’d say it was a nuisance [before that].”

“They reduced [advertising] by about 80 percent at some point. No more cross street banners that would divert your attention.”

All focus groups

Attitudes towards the current outdoor advertising in Moscow:
“At times, advertising may feel like an integral part of the urban landscape in a huge city. But the design must be beautiful.”

“I don’t pay much attention to it unless it has a cool design or there are aesthetically looking banners, just like Pepsi ads — big, beautiful and out of the box.”

“It depends on a context. [...] When stuck in a traffic jam, I would like to look at electronic outdoor ads.”

“I think that I start paying attention when I have some practical need.”

All focus groups

Based on the tolerance analysis, we have identified some notable changes in the tolerance for outdoor advertising in Moscow: although excessive mass advertising on city’s streets had provoked a strongly negative backlash from the residents several years ago, new restrictions aimed at reducing ad saturation have improved the situation to the point where outdoor ads are now seen as among the most tolerable media channels.
Adblocking apps

We have found some correlation between advertising tolerance and the desire for installing an ad blocking app. Users with positive or neutral attitudes do not use ad blockers. However, they tend to avoid advertising where it leaves a persisting negative impression.

**Tolerance index for Internet advertising among the users who are aware of adblockers**

- Neither use nor plan to use an adblocker: 1
- Thinking to have an adblocker: 14
- I use an adblocker: 34

**Focus group participants on reasons for using AdBlockers:**

- "When it comes to contextual advertising that I have found useful, practical and up to my existing expectations or needs, I would say that the effect is statistically negligible at this stage."
- "If I need to find a product or information I would prefer to do it myself, rather than having it imposed on me."  

Focus group (aged 30–40)

---

Among the respondents aware of adblocking apps, women and people living with their children, as well as people in the 35–39 and 45–49 age groups, are the least frequent users of ad blockers. This audience exhibits the highest tolerance for Internet advertising.

It is the opposite for Russians aged 16–24 because they most often tend to avoid Internet advertising. At the same time, every fifth respondent (20%) in the 25–29 age group is thinking about installing an ad blocking app.

**Focus group participants who do not have adblockers:**

- "I don’t have any. It seems that a search engine knows what it is that I’ve looked for. So, they start showing me things like wardrobes or pet foods, which I don’t mind."

Focus group (aged 45–55)
Advertising usefulness by product category

You have specified that you have a positive experience with advertising as a source of useful information. Could you specify a product category for the product for which you found advertising information useful?

Product categories where perceived usefulness is highest:

**TV advertising:**
- Foods — 63%
- Drugs — 54%
- Beverages — 51%

**Internet advertising:**
- Video games, movies and software — 66%
- Clothes — 64%
- Products and toys for children — 56%
- Household appliances — 55%
- Services — 55%

**Outdoor advertising:**
- Foods — 22%
- Household appliances — 21%
- Beverages — 20%

**Printed advertising:**
- Services — 21%
- Cosmetics/perfumes — 19%

**Radio advertising:**
- Services — 13%

Positive experiences with advertising:
- “I don’t mind if it is a beautifully-designed perfume ad, or else, there was a Moscow Credit Bank commercial with a grandpa in his ‘retro’ car, giving a money gift to his grand-daughter who is about to get married.”
- “I think it is when you watch some perfume ad and it is so nice that it don’t get your nerves.”
- “I like advertisements with some sweet toddlers in it.”
- “I like when they tell you a story that makes you curious for what comes next.”
- “I get a kick from commercials that make you smile as they exude something emotionally positive you would get focused on.”

All focus groups
Online purchases
Online purchase by product category

**Trends**

Digital products (video games, movies and software), household appliances and electronics, as well as goods for children and clothes are the most popular purchases to make online, with 14% to 39% of respondents preferring to purchase such products online and another 21% to 25% indicating an equal preference for both online and offline purchases.

“When the price is above a certain level. I won’t buy jewellery or perfume because I cannot be confident in the quality.”

**Focus group (aged 20–30)**

“Appliances, jewellery and perfumes.” “I have no experience, it is an issue of trust really.”

**Focus group (aged 30–40)**

“That would be medicines. I view it quite negatively because there are counterfeit drugs apart from that.”

**Focus group (aged 45–55)**

**Highlights**

While online purchases are slightly more popular with youngsters aged 20–39 and people living in Moscow and St. Petersburg (+2 pp to +8 pp above the average), Russians over 45 shop online less frequently (~4 pp to ~11 pp).

People living in Moscow and St. Petersburg more often indicated making online purchases of household appliances and electronics (+13 pp to +22 pp above the average).

Compared to men, women more often purchase clothes online (+16 pp).

Russians with children more often purchase goods for children and toys online (+6 pp above the average).

Russians 20–29 more often tend to purchase convenience meals online (+13 pp to +14 pp above the average) while people aged above 45 do this less often (~10 pp to ~20 pp).

---

**What is your preferred way of making purchases?**

- Video games, films and software: 39%
- Electronics: 22%
- Household appliances: 18%
- Clothes: 16%
- Products and toys for children: 14%
- Average level: 14%
- Cosmetics and perfumes: 12%
- Household goods: 7%
- Convenience food: 12%
- Household chemicals: 6%
- Drugs: 7%
- Foods, incl. beverages: 5%

- Share of respondents who generally prefer making purchases online
- Share of respondents who give an equal preference to online and offline purchases
- Share of respondents who generally prefer making purchases offline

---

**What is it that you would not purchase online?**

- “When the price is above a certain level. I won’t buy jewellery or perfume because I cannot be confident in the quality.”

**Focus group (aged 20–30)**

- “Appliances, jewellery and perfumes.” “I have no experience, it is an issue of trust really.”

**Focus group (aged 30–40)**

- “That would be medicines. I view it quite negatively because there are counterfeit drugs apart from that.”

**Focus group (aged 45–55)**

---
Frequency of online purchases

How often do you make purchases online? When was the last time you made an online purchase in each product category below? Please rate your satisfaction with the last online purchase on a scale from 1 to 5 where 1 is “totally dissatisfied” and 5 is “completely satisfied”.

The analysis of online purchase intervals and frequency can help segment potential customers and estimate the likelihood of future purchases for each customer segment.

For example, a shorter average time since the last purchase may mean that customers have satisfied their needs and will not look for new purchases in a related product category in the near future (on the table).

Targeted advertising content can be used to address audiences where time elapsed from the last purchase is comparable to an average time between purchases. This is the target audience (on the table).

It should be noted that having customers with times since the last purchase that are longer than the average period (on the table) may be indicative of low customer satisfaction and may indicate the customer’s reluctance to return for new purchases.

In fact, respondents who made purchases six months ago or more tend to reply with lower satisfaction levels across all product categories (except for electronics for which time to between purchases is longer), compared to other respondents.

Focus-group interviews have shown that the assessment of advertising usefulness depends on when it was the last time that an interviewee made a purchase.

Contextual advertising:

“It is usually vice versa: you buy something and they pester you with advertising.”
Focus group (aged 20–30)

“Once you’ve purchased something, it becomes irrelevant.”
Focus group (aged 30–40)

“It is very practical: when you cannot find something, here comes the ever accommodating Google with some additional hints.”

“Sometimes you may be looking for something to get an offer on the next day. Very useful.”
Focus group (aged 45–55)

<table>
<thead>
<tr>
<th>Product category</th>
<th>Frequency of purchases per month</th>
<th>Average time between purchases, days</th>
<th>When was the last time that you made your purchase online? (purchase satisfaction rate)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>This week 1–2 weeks ago 3–4 weeks ago 1.5–2 months ago 3–4 months ago At least 6 months ago</td>
</tr>
<tr>
<td>Convenience food</td>
<td>1.54</td>
<td>19</td>
<td>22% (3.6) 25% (3.9) 13% (4.0) 12% (3.9) 8% (4.0) 19% (3.4)</td>
</tr>
<tr>
<td>Foods, incl. beverages</td>
<td>1.30</td>
<td>23</td>
<td>17% (4.0) 21% (3.7) 11% (4.0) 10% (4.0) 9% (3.6) 32% (3.3)</td>
</tr>
<tr>
<td>Video games, movies and software</td>
<td>0.85</td>
<td>35</td>
<td>10% (4.3) 12% (4.2) 15% (4.1) 14% (4.2) 13% (4.2) 35% (3.9)</td>
</tr>
<tr>
<td>Products and toys for children</td>
<td>0.79</td>
<td>38</td>
<td>10% (4.4) 14% (4.2) 17% (4.1) 17% (4.1) 13% (4.2) 28% (3.9)</td>
</tr>
<tr>
<td>Drugs</td>
<td>0.79</td>
<td>38</td>
<td>10% (4.4) 16% (4.5) 17% (4.1) 12% (4.2) 10% (4.1) 35% (3.6)</td>
</tr>
<tr>
<td>Cosmetics and perfumes</td>
<td>0.77</td>
<td>39</td>
<td>9% (4.4) 18% (4.3) 20% (4.1) 20% (4.0) 12% (4.1) 21% (3.6)</td>
</tr>
<tr>
<td>Household chemicals</td>
<td>0.73</td>
<td>41</td>
<td>8% (4.2) 12% (4.3) 19% (4.2) 16% (4.0) 15% (4.0) 31% (3.4)</td>
</tr>
<tr>
<td>Clothes</td>
<td>0.72</td>
<td>42</td>
<td>9% (4.4) 18% (4.2) 19% (4.1) 19% (4.0) 15% (4.0) 22% (3.6)</td>
</tr>
<tr>
<td>Household goods</td>
<td>0.64</td>
<td>47</td>
<td>5% (4.3) 12% (4.2) 16% (4.1) 16% (4.2) 16% (4.1) 34% (3.7)</td>
</tr>
<tr>
<td>Household appliances</td>
<td>0.38</td>
<td>79</td>
<td>3% (4.2) 8% (4.2) 11% (4.2) 13% (4.4) 19% (4.3) 47% (4.1)</td>
</tr>
<tr>
<td>Electronics</td>
<td>0.38</td>
<td>79</td>
<td>4% (4.5) 7% (4.1) 12% (4.1) 13% (4.2) 20% (4.4) 43% (4.2)</td>
</tr>
</tbody>
</table>
How do you usually search for online shops?

- Official websites for offline shops: 61
- Search engines (Yandex, Google): 46
- Yandex.Market or other aggregators: 40
- Recommendations from friends: 29
- Ads in social networks: 20
- E-mails: 13
- Ads with e-mail providers: 8
- Ads with other Internet portals: 8
- Offline advertising: 7
- Ads with mass-media online portals: 6
- Mobile advertising: 4

Could you name us the websites with links that you used to go to online shops? Did it result in purchases?

- VKontakte: 10/23
- Yandex: 33/15
- Avito: 12/13
- Odnoklassniki: 4/10
- Google: 18/10
- Mail.Ru: 5/6
- Facebook: 3/5
- YouTube: 4/4
- Instagram: 2/3

What is Internet advertising to which you would not pay attention?

1. VKontakte: 10/23
2. Yandex: 33/15
3. Avito: 12/13
4. Odnoklassniki: 4/10
5. Google: 18/10
6. Mail.Ru: 5/6
7. Facebook: 3/5
8. YouTube: 4/4
9. Instagram: 2/3

Trends

The most popular ways to search for online shops include visiting the official websites of recognised brands (61%), using search engines (46%) and aggregator websites (40%), as well as recommendations from friends (29%) and ads on social networks (20%).

As perceived by respondents, they are more likely to click on online shop links on social networking sites such as VKontakte and Odnoklassniki. However, this does not generally result in a purchase. At the same time, using search engines (Yandex and Google) tends to generate purchases much more often.

Highlights

People living in Moscow and St. Petersburg much more often use aggregator services such as Yandex.Market when searching for an online shop (+18 pp to +23 pp above the average).

At the same time, students less often use search engines and aggregator services (-16 pp to -19 pp) while paying more attention to ads on social networking sites (+12 pp).

E-mail advertising is more efficient for audiences over 65 as people from this age group more often tend to look for an online shop by using a link in the e-mail (+10 pp).

Focus group (aged 45-55)

“I don’t remember YouTube’s commercials, these go in at one ear and out at the other.”

“Because they do not have topic-related advertising on YouTube. You could memorise ads that are somehow related to a video you watch. However, their ads are not even remotely relevant.”
Media consumption during 2017 FIFA Confederations Cup
Shift in the media consumption during 2017 FIFA Confederations Cup

Change in media consumption (% net balance)

How did the 2017 FIFA Confederations Cup change your media consumption?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching TV</td>
<td>+52</td>
</tr>
<tr>
<td>Using the Internet</td>
<td>+31</td>
</tr>
<tr>
<td>Listening to the radio</td>
<td>+8</td>
</tr>
<tr>
<td>Visiting a sport event</td>
<td>+7</td>
</tr>
<tr>
<td>Reading printed media</td>
<td></td>
</tr>
<tr>
<td>Reading printed books</td>
<td>-7</td>
</tr>
<tr>
<td>Reading electronic books</td>
<td>-7</td>
</tr>
<tr>
<td>Going to cinema</td>
<td>-8</td>
</tr>
<tr>
<td>Video gaming on any devices</td>
<td>-9</td>
</tr>
<tr>
<td>Going to a theatre/concert</td>
<td>-9</td>
</tr>
</tbody>
</table>

Increased  Decreased

In 2017, Russia hosted the 2017 FIFA Confederations Cup (the “Cup”), with 42% of respondents following this event. Even though the impact of large sport events on media consumption is only temporary, it is nevertheless strong. Thus, TV viewership and Internet surfing grew significantly (+52% and +31%, respectively). During the Cup, the most accessed content included match broadcasts (28%), the opening/closing ceremonies (12%), news (24%) and broadcasts offering analysis (10%), as well as online news (11%) and updates on social networking sites (8%).

1. Do you watch TV?

“I watch TV on rare occasions, which includes sport events. Otherwise I keep it switched off.”

“World Cups in ice hockey or football — I watch them on TV because it is more comfortable. Otherwise, I don’t know why you would want to watch TV.”

“There is an exception. That is the Olympic Games or the Confederations Cup. This is something I would watch on TV.”

Focus group (aged 20-30)

1. Do you follow sport events?

“I think that I would even go to the World Cup, but that will be purely to keep my husband company as he’s really looking forward to it.”

“Football is what I watch. I try to do it with my son. It is really atmospheric when at a stadium with other people who have come to support their teams.”

“We usually go to some sport bar to watch it on a wide screen. But it is more about having a social rather than a sport event.”

Focus group (aged 30-40)

1. Do you watch TV on rare occasions, which includes sport events. Otherwise I keep it switched off”

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“We usually go to some sport bar to watch it on a wide screen. But it is more about having a social rather than a sport event.”

Focus group (aged 30-40)
Advertising during sporting events

How did you follow the FIFA Confederations Cup?

Match broadcasts: 28
TV news: 24
Broadcasts of the opening and closing ceremony: 12
Publications by news sources, sports newspapers and magazines: 11
Football-related broadcasts offering analysis: 10
Event-related content in social networks: 8
Online videos with highlights from the matches: 7
Printed newspapers and magazines: 5
Attended the Cup’s matches: 3
Event coverage via dedicated mobile apps: 2
Attended the opening/closing ceremony: 1
Sport/betting clubs, sport/traditional bars, fan zones: 1

While the broadest audience reach is demonstrated by TV and online sports broadcasts, many respondents report that they pay no attention to advertisements that are being shown. A number of football fans at stadiums or sport clubs and pubs is much lower. However, ads shown there or delivered via dedicated mobile apps are much more effective in terms of reaching the audience because of better targeting and higher attentiveness levels.

While being a relatively new way to communicate with sport audiences, dedicated applications are increasingly becoming popular. Given its capability for keeping in constant touch with the audience, this media channel has a significant advertising potential.

Did you pay attention to advertisements during the 2017 FIFA Confederations Cup?

The size of a sphere reflects the effectiveness of an advertising channel: (the audience of an advertising channel multiplied by the channel awareness index)

1 The advertising awareness index: [the number of respondents who paid attention to the advertising divided by the number of respondents to whom the advertising was broadcast]
Sixty five percent of our respondents indicated paying attention to which companies sponsored the 2017 FIFA Confederations Cup and the FIFA World Cup, with every fourth (24%) reporting a positive impact on how they perceive sponsoring companies.

Respondents from the focus groups frequently report that they develop firm associations between a sponsoring brand and a sport discipline.

At the same time, some respondents noted a fundamental disconnect when products that are not associated with a healthy lifestyle (e.g. beer, tobacco and fast food) are advertised during sporting events. However, other respondents tend to accept this.

What is your attitude towards companies that sponsor sport events?

“Beer and McDonald’s — it is a parallel universe to sports. Sport brands such as Nike or Adidas are ok with me. But it is short of blasphemy when they advertise beer all over the place.”

“It is not that my perception of a company becomes more negative. I struggle to understand what McDonald’s, Coca-Cola or any other soda or fast food company have in common with sports.”

Focus group (aged 20–30 and 30–40)

“I just accept it. Business is business. Some people play to win, others play to sell.”

“A sponsor with its financial support should, above all, contribute to the atmosphere. It doesn’t matter what product it is.”

Focus group (aged 30–40 and 45–55)

Do you associate sport events with their sponsors?

“Watching a fixture inevitably makes you think of Coca-Cola or Adidas even when these are not on the screen... As soon as I started watching a match I thought of Qatar Airways.”

“I associate Bud with football.”

“I associate VISA with football.”

“McDonald’s and Baltika beer.” I always remember that a football match comes with Baltika.”

All focus groups
Awareness of sponsoring brands

Our survey took place two weeks after the 2017 FIFA Confederations Cup.

As mentioned earlier, rates assigned to sponsorship-based advertising cannot be used as an advertising efficiency indicator. To assess the impact from advertising, we asked respondents to specify which of the listed brands they knew. When asking the respondents to do so, we did not mention the involvement of these brands with the 2017 FIFA Confederations Cup.

Trends
Sponsors for the 2017 FIFA Confederations Cup and FIFA partners such as Gazprom, Adidas, Coca-Cola, Visa, McDonalds, Alfa-Bank, Hyundai and Kia Motors enjoy the highest brand awareness in Russia: 96% to 99% of respondents specified these brands. Therefore, the impact from advertising during the 2017 FIFA Confederations Cup is neutral in terms of brand awareness. The partnership with FIFA serves more for maintaining brand awareness, rather than for increasing it. It can also be used to boost brand recognition and create a positive image abroad.

Given that, it would be more interesting to look at sponsoring companies with lower brand awareness levels since there is a notable correspondence between brand awareness and whether respondents followed the events during the 2017 FIFA Confederations Cup.

Highlights
The respondents who followed the events during the 2017 FIFA Confederations Cup recognised the names of sponsors and partners (+9 pp to +25 pp above the average). The awareness of brands such as Bud and Qatar Airways is also higher among more passive football fans at the 2017 FIFA Confederations Cup (+8% to +9%).

It is the opposite with the respondents who did not follow this sporting event: their brand awareness is notably below the average.

*Do you know the companies listed?*

![Graph showing brand awareness levels for various companies listed in the survey.](image)
Media consumption in figures
Russian media consumption in figures

Target audience size

- 100% on internet
- 92% on radio
- 63% on TV-set
- 50% on printed media

Frequency media sources used

- 5.5 days per week for internet
- 4.6 days per week for radio
- 3.7 days per week for TV-set
- 1.2 days per week for printed media

Overall perceived usefulness of media sources

<table>
<thead>
<tr>
<th>Media Source</th>
<th>Work Day</th>
<th>Change from 2016</th>
<th>Weekend</th>
<th>Change from 2016</th>
<th>Average</th>
<th>Change from 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>48%</td>
<td>-18 pp</td>
<td>34%</td>
<td>-16 pp</td>
<td>41%</td>
<td>-17 pp</td>
</tr>
<tr>
<td>Radio</td>
<td>5%</td>
<td>+5 pp</td>
<td>1%</td>
<td>+5 pp</td>
<td>3%</td>
<td>+5 pp</td>
</tr>
<tr>
<td>Printed books</td>
<td>0%</td>
<td>+3 pp</td>
<td>2%</td>
<td>+2 pp</td>
<td>1%</td>
<td>+2 pp</td>
</tr>
<tr>
<td>TV-set</td>
<td>-6%</td>
<td>-9 pp</td>
<td>8%</td>
<td>-15 pp</td>
<td>1%</td>
<td>-12 pp</td>
</tr>
<tr>
<td>Printed media</td>
<td>0%</td>
<td>+1 pp</td>
<td>-2%</td>
<td>+4 pp</td>
<td>-1%</td>
<td>+3 pp</td>
</tr>
<tr>
<td>Electronic books</td>
<td>-2%</td>
<td>-2 pp</td>
<td>-1%</td>
<td>0 pp</td>
<td>-2%</td>
<td>-1 pp</td>
</tr>
<tr>
<td>Video games</td>
<td>-20%</td>
<td>+7 pp</td>
<td>-14%</td>
<td>+5 pp</td>
<td>-17%</td>
<td>+6 pp</td>
</tr>
</tbody>
</table>

Time spent on media

<table>
<thead>
<tr>
<th>Media Source</th>
<th>Work Day</th>
<th>Change from 2016</th>
<th>Weekend</th>
<th>Change from 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>2 hr 25 min</td>
<td>+15 min</td>
<td>1 hr 29 min</td>
<td>-4 min</td>
</tr>
<tr>
<td>Radio</td>
<td>1 hr 23 min</td>
<td>-7 min</td>
<td>1 hr 34 min</td>
<td>+15 min</td>
</tr>
<tr>
<td>TV-set</td>
<td>3 hr 57 min</td>
<td>+1 min</td>
<td>4 hr 15 min</td>
<td>-7 min</td>
</tr>
<tr>
<td>Printed media</td>
<td>2 hr 27 min</td>
<td>+1 min</td>
<td>3 hr 12 min</td>
<td>-17 min</td>
</tr>
</tbody>
</table>

Russians’ work day preferences

1. What would Russians not do without on a work day?
   - 71% Internet
   - 22% Radio
   - 12% TV-set

2. What would Russians do without on a work day?
   - 28% Internet
   - 24% Radio
   - 23% TV-set

Russians’ weekend preferences

1. What would Russians not do without on a weekend?
   - 60% Internet
   - 36% Radio
   - 8% TV-set

2. What would Russians do without on a weekend?
   - 28% Internet
   - 26% Radio
   - 22% TV-set

1 The media source usefulness index is the proportion of those who would like to continue using a media source minus the proportion of those who would like to stop using it for better daily productivity.
Media consumption in Russia – 2017

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