Contents

01 Foreword 3
02 Research methodology 4
03 Key findings 5
04 Media consumption in Russia 11
05 Data content and usage patterns 12
06 Technology and media consumption 28
07 Attitudes towards advertising 36
08 Media consumption in figures 42
09 Contacts 44

Foreword

Research methodology

Key findings

Media consumption in Russia
  Media consumption by category
  Russians as media users
  Media usage throughout the day
  Media consumption practices
  Changes in media consumption in 2016–2020
  Video games

Data content and usage patterns
  News sources
  Media source ranking by trust level
  Attitudes towards the media: Russian or foreign source?
  The most popular content for each media
  Frequency of visits to Internet resources
  Popularity of Internet resources
  Video content

Technology and media consumption
  Attitudes towards new gadgets
  Russian household ownership of media devices
  Popularity of smartphone features
  Messengers
  Access to media channels by connection type

Attitudes towards advertising
  Tolerance and perceived usefulness of various advertising channels
  Advertising by product category
  Ad blockers

Media consumption in figures
  Russian media consumption in figures

Contacts
We are proud to present the results of our annual comprehensive study of media consumption in Russia.

While continuing to look at media trends and content consumption across all key channels, this year’s report will focus on how quarantine measures affected media consumption in Russia, both during and after the lockdown. The use of both qualitative (focus groups and interviews) and quantitative (the nationwide survey) methods of data collection and analysis helped us gain a deeper understanding of the core trends and map out potential benefits for market players.

Lockdown measures had a significant impact on how Russians consumed media. On the one hand, the media usage index\(^1\) demonstrated significant year-on-year growth (+23%) with surges in usage for almost all types of online activity, most notably podcasts (+16 pp to 53%), streaming movies and videos (+20 pp to 70%), online shopping (+12 pp to 87%), music and radio (+14 pp to 87%). While many media channels (television, print media, etc.) saw their audience share decline compared to 2019, respondents’ engagement and time spent with their preferred media channel increased markedly in 2020.

We noted an increase in gaming, which garnered a media usage index of 11% this year (+4 pp vs. 2019), even though the percentage of respondents who reported playing games decreased for all categories (to 39%). This was due to the fact that respondents are spending more time gaming (+16 minutes on weekdays and +46 minutes at weekends).

Russians have also changed in their attitudes towards advertising. Focus group sessions suggested oversaturation across various advertising channels, and especially on the Internet. Bright and loud advertising in video and audio content is perceived quite negatively, while users find it distracting and annoying when websites have a large number of various banners ads. This is why almost half of our respondents use or intend to use ad blocking software on their devices.

You can find out more about the above trends and the many others uncovered through our research in this report.

We hope that our findings will help companies develop strategies that will equip them to better serve their existing and target customers.

If you have any questions, please contact us by email at cisresearchteam@deloitte.ru.

---

\(^1\) The media usage index is calculated as follows: [the percentage of respondents indicating higher usage minus the percentage indicating lower usage]
Purpose
To study Russian media consumption trends in 2020.

Target group
Russian Internet users aged 14 and over (as the survey was conducted online) ("Russians").

Limitations of research
Considering the current level of Internet penetration among Russians¹, our sample tends to be biased towards Internet users.

Goals
• Look into how Russians’ media consumption has changed over the last five years (2016–2020);
• Take a detailed look at Russians’ media behavior, the information channels they use, what they are interested in, how much time they spend consuming media services, and how COVID-related restrictions have changed consumption;
• Assess the Russians’ level of trust in various information sources;
• Analyze what devices are used to consume media content;
• Assess the Russians’ tolerance for advertising, including by type of media activity;
• Conduct a comparative analysis of the identified consumer profiles for various types of media activity.

Data collection methods
We used both qualitative and quantitative data collection methods, namely:
• An online survey of a representative socio-demographic sample of the Russian population. The survey was conducted in June 2020;
• Focus group sessions, conducted online due to lockdown measures. Two focus groups involving 10 people were conducted in September 2020;
• Interviews with industry leaders.

Research sample
Research sample A multistage and stratified sample of the Russian population by gender, age and settlement type: 1,600 people from eight federal districts and at least 200 settlements.

Legend

¹ According to Russian Public Opinion Research Center (VCIOM), Internet penetration among Russians over the age of 18 was 83% in June 2020.
Key findings

Connection

- **Internet TV**: 43%
- **Personal cable**: 30%
- **Community antenna**: 23%

TV watching behavior on weekdays/weekends

- **32/37%**
  - I switch on the TV to find something to watch. If there is nothing interesting, I just leave it on in the background and/or watch the show that seems the most interesting.

- **24/22%**
  - I turn on the TV to watch a specific program

Top five online video services, %*

- **YouTube**: 92%
- **VKontakte**: 33%
- **Yandex**: 25%
- **Instagram**: 15%
- **Odnoklassniki**: 14%

* The majority of respondents use two or more online video services

Devices used to watch TV and change vs. 2019

- **TV set**: 97% (+2 pp)
- **Smartphone**: 70% (+9 pp)
- **Desktop PC**: 65% (+6 pp)

TV in the last two weeks

- **88%**

Trends

- The gradual decline in the percentage of Russians using television is persisting. Our 2020 survey shows that 88% of respondents have watched TV in the last two weeks, which is the lowest result in the last five years (2015: 94%). However, respondents who still watch TV indicated significantly higher usage of television (+28%) in 2020. For comparison, TV’s media usage index was -4% in 2019.

- The percentage of TV viewers who are switching to Internet TV continued to grow, while the popularity of other connection types fell. The share of respondents who use Internet TV rose to 43% (from 41% in 2019 and 38% in 2018), while the share who use personal cable and community antenna fell to 30% and 23% respectively (from 35% and 27% in 2019 respectively).

- Moreover, the percentage of users using their smartphones and PCs to watch TV continues to rise. In 2020, 70% of respondents used their smartphones (+9 pp vs. 2019) and 65% of respondents watched TV on their PCs (+6 pp vs. 2019).

- Films, news and TV series remain the most popular types of TV content. Of TV users, 95% watch movies (+1 pp vs. 2019), 86% watch news content (the same as in 2019), and 79% watch TV series (+5% vs. 2019). Popular science and educational programs benefited from the greatest increase in popularity among respondents in 2020 (71%, +21 pp vs. 2019).
Key findings

Top five podcast categories, %, and percentage point change vs. 2019

- Movies, music, art: 78% (+4 pp)
- News: 73% (+4 pp)
- Popular science and education: 68% (-1 pp)
- Politics and society: 66% (+2 pp)
- Theme programs: 62% (-)

Average podcast listening time: 44 minutes per day

Devices used to listen to the radio

- Car stereo: 41% (+1 pp)
- Radio at home: 23% (-2 pp)
- Smartphone: 16% (-5 pp)

Radio listening behavior on weekdays/weekends

- 42/36% listen to the radio while driving
- 27/45% listen to the radio at home
- 20/2% listen to the radio at work

Trends

- The rapid decline in radio usage has slowed down since 2015, stabilizing at 56% in 2019–2020 (59% in 2018 and 62% in 2017).
- Foreign music and Russian music remain the most popular types of radio content (89% and 87%, respectively). The popularity of radio as a source of news continues to decline as the importance of social media, blogs and online videos grows.
- The most popular devices used to listen to the radio on weekdays and at weekends include car stereos (41%), radios at home (23%) and smartphones (16%).
- The average time respondents spent listening to podcasts increased by 4 minutes in 2020 (vs. 2019), rising to 44 minutes per day. The leading categories in terms of overall popularity and listenership expansion were podcasts about movies, music and art (78% of listeners, +4 pp vs. 2019), and news (73% of listeners, +4 pp vs. 2019).
Key findings

The majority of respondents use more than one type of connection.

<table>
<thead>
<tr>
<th>Internet connection¹ and change vs. 2019</th>
<th>Internet usage behavior on PCs</th>
<th>Devices used to connect to the Internet and change vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wireless Internet (Wi-Fi) 53%</td>
<td>I go online often and for extended periods of time</td>
<td>Smartphone 92% +4 pp</td>
</tr>
<tr>
<td>Direct cable connection 43%</td>
<td>I go online often, but only for short periods of time</td>
<td>Laptop 77% +3 pp</td>
</tr>
<tr>
<td>Mobile Internet 41%</td>
<td>I rarely go online, but when I do, I stay online for extended periods of time</td>
<td>Desktop PC 70%</td>
</tr>
<tr>
<td>Modern connection 16%</td>
<td>I rarely go online and only for short periods of time</td>
<td>80% own a laptop/PC</td>
</tr>
</tbody>
</table>

¹ The majority of respondents use more than one type of connection

Top five Internet resources, %, and percentage point change vs. 2019

<table>
<thead>
<tr>
<th>Resource</th>
<th>2020 %</th>
<th>Change vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youtube</td>
<td>87</td>
<td>+1</td>
</tr>
<tr>
<td>Vkontakte</td>
<td>85</td>
<td>+5</td>
</tr>
<tr>
<td>Instagram</td>
<td>59</td>
<td>+7</td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td>55</td>
<td>-2</td>
</tr>
<tr>
<td>Facebook</td>
<td>46</td>
<td>+12</td>
</tr>
</tbody>
</table>

Trends

- The most popular reason for accessing the Internet remains unchanged from last year. Respondents mainly go online to search for information (98% of Internet users, +2 pp vs. 2019). The share of respondents who use government services and Internet banking increased to 95% in 2020. 94% of respondents check for updates on their social media accounts (+3.9 pp vs. 2019).
- YouTube and VKontakte are still the most popular Internet resources, attracting 87% and 85% of respondents respectively. Instagram enjoyed the biggest growth in popularity (+7 pp vs. 2019 to 59%).
- The percentage of wireless Internet users rose for the fifth year running, growing to 53% in 2020 (from 44% in 2015). The growth in the share of mobile Internet users accelerated significantly in 2020 to 41% (from 29% in 2015). The fall in the popularity of direct cable connection has stalled, remaining at 42%–43% in recent years (down from 52% in 2015).
- Among devices used to access the Internet, smartphones (+4 pp vs. 2019 to 92%) and laptops (+3 pp vs. 2019 to 77%) enjoyed the biggest increase in 2020. The share of users using PCs to go online has remained unchanged in recent years (at 70%).
Key findings

### Popularity of print media by type, %, and percentage point change vs. 2019

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage</th>
<th>Change vs. 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magazines</td>
<td>54</td>
<td>-2</td>
</tr>
<tr>
<td>Newspapers</td>
<td>53</td>
<td>-5</td>
</tr>
<tr>
<td>E-books</td>
<td>38</td>
<td>-1</td>
</tr>
<tr>
<td>Printed books</td>
<td>36</td>
<td>-6</td>
</tr>
<tr>
<td>Printed books</td>
<td>36</td>
<td>-6</td>
</tr>
<tr>
<td>Printed books</td>
<td>36</td>
<td>-6</td>
</tr>
</tbody>
</table>

### Trends

- The overall popularity of print media continues to decline, hitting its lowest level for the past five years. Only 38% of respondents had read print media at least once in past two weeks in 2020 (compared to 57% in 2015).
- The popularity of reading as a way of consuming media content has declined for all channels. In addition to print media, the share of respondents reading printed books (36%, -6 pp vs. 2019) and E-books (38%, -1 pp vs. 2019) also decreased in 2020.
- The popularity of newspapers is decreasing faster than that of magazines. 53% of respondents at least sometimes read newspapers (-5 pp vs. 2019), while the figure for magazines was 54% (-2 pp vs. 2019).
- The share of respondents who read free print media (28%, +1 pp vs. 2019) and purchase specific print media publication on an irregular basis (22%, +4 pp vs. 2019) has increased due to a slight decrease in other categories.

### Reading habits

- 28% I read free print media
- 22% I buy specific print media publications, but not regularly
- 15% I do not buy print media, but I read what my friends buy
Key findings

Top five instant messengers, %, and percentage point change vs. 2019

<table>
<thead>
<tr>
<th>Messenger</th>
<th>2020</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>WhatsApp</td>
<td>88</td>
<td>+5</td>
</tr>
<tr>
<td>Viber</td>
<td>62</td>
<td>+1</td>
</tr>
<tr>
<td>Skype</td>
<td>52</td>
<td>-1</td>
</tr>
<tr>
<td>Telegram</td>
<td>50</td>
<td>+10</td>
</tr>
<tr>
<td>Facebook Messenger</td>
<td>44</td>
<td>+6</td>
</tr>
</tbody>
</table>

Trends

- Smartphone penetration continued to rise in 2020, with 95% of respondents owning smartphones (compared to 91% in 2019 and 72% in 2015).
- Instant messengers were the number one smartphone feature for the third consecutive year, with 42% of respondents indicating more frequent use. Social media apps (35%) and Internet calls (33%) also continue to gain ground.
- The most popular instant messengers remain the same for the third year in a row. Telegram recorded its highest spike in usage in 2020 (up to 50%, +10 pp vs 2019).
- Smartphones continue to surge in popularity and usage. In 2020, 92% of respondents used smartphones to access the Internet (+4 pp vs. 2019).
- The majority of users go online on their smartphones often and for extended periods of time (64%) (+2 pp vs. 2019).
Key findings

Usefulness of advertising channels¹, %

<table>
<thead>
<tr>
<th>Advertising Channel</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV advertising</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Search engine advertising</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>-8%</td>
<td></td>
</tr>
<tr>
<td>Print media advertising</td>
<td>-11%</td>
<td></td>
</tr>
<tr>
<td>Website advertising</td>
<td>-15%</td>
<td></td>
</tr>
<tr>
<td>Social media advertising</td>
<td>-18%</td>
<td></td>
</tr>
<tr>
<td>Radio advertising</td>
<td>-25%</td>
<td></td>
</tr>
<tr>
<td>Email advertising</td>
<td>-30%</td>
<td></td>
</tr>
<tr>
<td>Mobile advertising</td>
<td>-39%</td>
<td></td>
</tr>
<tr>
<td>Mobile app advertising</td>
<td>-47%</td>
<td></td>
</tr>
<tr>
<td>Sponsorship-based advertising</td>
<td>-51%</td>
<td></td>
</tr>
<tr>
<td>Advertising in audio content</td>
<td>-66%</td>
<td></td>
</tr>
<tr>
<td>Cold calling</td>
<td>-71%</td>
<td></td>
</tr>
</tbody>
</table>

¹ Perceived advertising usefulness: [the share of respondents who found information from advertisements useful minus the share who did not find such information useful].

Internet usage behavior on tablets

<table>
<thead>
<tr>
<th>Behavior</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>I go online often for extended periods of time</td>
<td>33%</td>
</tr>
<tr>
<td>I go online often, but only for short periods of time</td>
<td>29%</td>
</tr>
<tr>
<td>I rarely go online, but when I do, I stay online for extended periods of time</td>
<td>13%</td>
</tr>
<tr>
<td>I rarely go online and only for short periods of time</td>
<td>25%</td>
</tr>
</tbody>
</table>

Trends

- Tablet penetration reached 60% in 2020. However, only 51% of respondents use this device (-2 pp vs. 2019).

- The main reasons for using tablets include surfing the Internet and watching TV (50% and 41% of respondents respectively). This year's biggest spike in tablet usage was for playing video games (44% of respondents, +26 pp vs. 2019).

- Internet usage behavior on tablets remained almost unchanged this year. A third (33%) of respondents use tablets to go online often and for extended periods of time (+1 pp) and a quarter (25%) use the device to go online rarely and for short periods of time (-2 pp).

- The popularity of ad blockers is growing steadily for all devices. This is especially true for smartphones and tablets. In 2020, 40% of respondents said that they use ad blockers on their mobile devices (+12 pp vs. 2019) and 44% use ad blocking software on PCs and laptops (+2 pp vs. 2019).

- Similarly to 2019, TV ads (18%) and search ads (3%) were perceived as the most useful. Cold calls (71%), advertising in audio content (66%) and sponsorship-based ads (51%) were perceived as the least useful sources of information.

Ad blocking and change vs. 2019

- 40% on smartphones and tablets (+12 pp vs. 2019)
- 44% on laptops/PCs (+2 pp vs. 2019)
Media consumption in Russia

01 Foreword
02 Research methodology
03 Key findings
04 Media consumption in Russia
   Media consumption by category
   Russians as media users
   Media usage throughout the day
   Media consumption practices
   Changes in media consumption in 2016–2020
   Video games
05 Data content and usage patterns
06 Technology and media consumption
07 Attitudes towards advertising
08 Media consumption in figures
09 Contacts
Media Consumption in Russia – 2020

Media consumption by category

Audience reach, %

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>TV</td>
<td>88</td>
<td>91</td>
<td>93</td>
<td>92</td>
<td>92</td>
</tr>
<tr>
<td>Radio</td>
<td>56</td>
<td>56</td>
<td>59</td>
<td>62</td>
<td>58</td>
</tr>
<tr>
<td>Video games</td>
<td>39</td>
<td>48</td>
<td>45</td>
<td>50</td>
<td>54</td>
</tr>
<tr>
<td>Print media</td>
<td>38</td>
<td>45</td>
<td>44</td>
<td>50</td>
<td>52</td>
</tr>
<tr>
<td>Printed books</td>
<td>36</td>
<td>42</td>
<td>42</td>
<td>45</td>
<td>41</td>
</tr>
<tr>
<td>E-books</td>
<td>38</td>
<td>39</td>
<td>39</td>
<td>42</td>
<td>39</td>
</tr>
<tr>
<td>Cinemas</td>
<td>0</td>
<td>12</td>
<td>17</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Theaters/concerts</td>
<td>0</td>
<td>54</td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Trend
- Audience reach dropped by 4 pp in 2020 (56%) compared to the average level in 2019 (60% excluding cinema and theaters).
- Television is much less popular this year among respondents aged 40–44 (-10 pp vs. 2019). Young people aged 14–19 (77%) and 20–24 (73%) are still the least active TV watchers (-4 pp and -2 pp vs. 2019 respectively).
- In 2020, the audience reach for print media and books fell by 7 pp and 6 pp respectively.
- The popularity of video games fell by -9 pp compared to 2019. However, respondents that do play video games, tend to play them for longer periods, as demonstrated by the usage index for video games (+11% or 4 pp vs. 2019).

Insights
- Media consumption in towns with a population of less than 500,000 people is 3 pp below the average.
- The lowest level of media consumption (47%) is among respondents who live alone. The media consumption of respondents who do not live alone is 57%. Employed respondents are slightly more active in using media content (8 pp higher than unemployed respondents).
- Respondents with higher education are still more active media consumers than those with secondary education (60% vs. 52%, or 8 pp higher).
- We conducted our survey while COVID-related quarantine measures were still in place. As the majority of public places were closed, we did not ask questions related to cinemas, theatrical events and concerts.

1 Due to the data collection method used (online survey)
2 Average audience reach for the nine selected media channels
Insights

Media consumption by category

Video games

Our survey shows that the share of respondents who play video games decreased by 9 pp this year. This is true for all categories. The popularity of video games is similar across all federal district, with the Central federal district leading at 3 pp above the average.

Changes in consumption

The gender gap in the popularity of video games narrowed from 17 pp to 11 pp. Nevertheless, video games are still more popular with men (45%).

Residents of cities with 500,000 to one million inhabitants are most likely to play video games (42%, -7 pp vs. 2019). The share of respondents who reported playing video games in million-plus cities decreased by 14 pp this year to 38%.

“...due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Radio

People living in the Far East (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronovirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Print media

Print media is less popular with people living in St. Petersburg (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Radio

People living in St. Petersburg listened to the radio more often (65%) than those living in the Far East (42%) or North Caucasian (38%) federal districts.

Changes in consumption

The radio audience in St. Petersburg rose by 9 pp in 2020 but remained unchanged in Moscow (at 60%).

The share of respondents who listen to the radio fell in the Far East federal district (by 9 pp), canceling out the rise in 2019. Radio listenership also fell in the North Caucasian federal district (by 15 pp).


“...due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Print media

Print media is less popular with people living in St. Petersburg (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Radio

People living in St. Petersburg listened to the radio more often (65%) than those living in the Far East (42%) or North Caucasian (38%) federal districts.

Changes in consumption

The radio audience in St. Petersburg rose by 9 pp in 2020 but remained unchanged in Moscow (at 60%).

The share of respondents who listen to the radio fell in the Far East federal district (by 9 pp), canceling out the rise in 2019. Radio listenership also fell in the North Caucasian federal district (by 15 pp).


“...due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Print media

Print media is less popular with people living in St. Petersburg (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Radio

People living in St. Petersburg listened to the radio more often (65%) than those living in the Far East (42%) or North Caucasian (38%) federal districts.

Changes in consumption

The radio audience in St. Petersburg rose by 9 pp in 2020 but remained unchanged in Moscow (at 60%).

The share of respondents who listen to the radio fell in the Far East federal district (by 9 pp), canceling out the rise in 2019. Radio listenership also fell in the North Caucasian federal district (by 15 pp).


“...due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Print media

Print media is less popular with people living in St. Petersburg (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Radio

People living in St. Petersburg listened to the radio more often (65%) than those living in the Far East (42%) or North Caucasian (38%) federal districts.

Changes in consumption

The radio audience in St. Petersburg rose by 9 pp in 2020 but remained unchanged in Moscow (at 60%).

The share of respondents who listen to the radio fell in the Far East federal district (by 9 pp), canceling out the rise in 2019. Radio listenership also fell in the North Caucasian federal district (by 15 pp).


“...due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Print media

Print media is less popular with people living in St. Petersburg (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Radio

People living in St. Petersburg listened to the radio more often (65%) than those living in the Far East (42%) or North Caucasian (38%) federal districts.

Changes in consumption

The radio audience in St. Petersburg rose by 9 pp in 2020 but remained unchanged in Moscow (at 60%).

The share of respondents who listen to the radio fell in the Far East federal district (by 9 pp), canceling out the rise in 2019. Radio listenership also fell in the North Caucasian federal district (by 15 pp).


“...due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)

Print media

Print media is less popular with people living in St. Petersburg (42%) compared to 2019 (44%); however, the popularity of print media is still 4 pp above the national average.

Changes in consumption

In 2020, print media audience fell in Moscow and the Central federal district (by 14 pp in each). Readership of print media also fell in all other Russian regions (by an average of 10 pp) with the exception of the Siberian and the Southern federal districts, where print media consumption remained unchanged from last year at an average of 38%.

“I don't really play video games, but due to the coronavirus, I replayed video games from my childhood. I just wanted to bring back those nostalgic memories.”

Focus group (aged 18–35)
**E-books**

**Insights**
E-books were most popular with residents of St. Petersburg in 2020 (58%, +14 pp vs. 2019), at a considerable 20 pp above the sample average.

E-books are also more popular with people aged 30–44 (42%). Employed people are 9 pp more likely to read e-books than unemployed people (41% vs. 32%).

The gap is greater among those with different levels of education. E-books are less popular with Russians with secondary education (29%). Respondents with higher education are more active e-book users (43%).

**Changes in consumption**
The popularity of e-books among young people aged 20–24 plunged by 15 pp.

E-books became less popular with business owners (-13 pp vs. 2019) and self-employed respondents (-10 pp vs. 2019).

**Printed books**

**Insights**
Printed books are most popular with residents of St. Petersburg (44%), respondents aged 50–54 (41%) and people over 65 (42%). Printed books are less popular in the Far East (29%) and North Caucasian (31%) federal districts.

41% of Russian responders with higher education and 27% with secondary education read printed books.

Printed books are also more popular with servicemen (50%) and government employees (41%).

**Changes in consumption**
Women are still significantly more likely to read printed books than men, though the gender gap has narrowed from 12 pp to 7 pp this year.

Printed books are much less popular in Moscow (-19 pp).

The popularity of printed books among respondents aged 16–29 dropped by 13 pp, which more than double the rate of decline for all groups of respondents (6 pp).

**Social media**

**Insights**
Residents of St. Petersburg are more active users of social media (+9 pp) compared to the sample average (90%).

Women are 8 pp more likely to use social media than men (94% vs. 86%).

Social media usage tends to decrease as the age of respondents increases (from 94% for the under 29 age group to 83% for the over 60s).

Employees of law enforcement agencies are less active social media users (10 pp lower) than employees in other areas.

Social media is also less popular with responders who live alone (4 pp lower) than those with higher education.

**Online videos**

**Insights**
Russians tend to spend their free time watching online videos (85% of respondents). The results of all Russian regions are relatively close to the average (+5 pp).

Online videos are least popular with residents of the Far East federal district (81%) and most popular with residents of the Northwestern federal district (87%).

Based on the popularity of social media and online videos, it can be concluded that people living in the Northwestern federal district are the most active Internet users in Russia.

Videos are popular with residents of all age groups; however, those over 60 are somewhat less likely to watch them (by 6 pp).

Online videos are also less popular with residents who live alone (77%) compared to those who do not live alone (89%).

“I’ve recently started using Twitter, mostly for political news. I follow specific people I find interesting.”

“I have tended to use social media less actively during the pandemic as my eyes get extremely tired from working on a computer all day. I prefer using Zoom to connect with friends.”

“I’ve gotten into e-sports and video game streaming on Twitch.”

Focus group (aged 18-25)
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 the response that best describes you.

Yes, I am an active media user. I share news with friends/colleagues/acquaintances both in person and online (social media, blogs, forums, etc.), %

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>40</td>
<td>41</td>
<td>40</td>
<td>42</td>
<td>40</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>33</td>
<td>34</td>
<td>34</td>
<td>35</td>
<td>36</td>
</tr>
</tbody>
</table>

Yes, I am an active media user. I prefer not to share news with friends/colleagues/acquaintances online (social media, blogs, forums, etc.), %

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Yes, I am an active media user. I prefer not to share news with friends/colleagues/acquaintances either in person or online, %

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>16</td>
<td>17</td>
<td>14</td>
<td>16</td>
<td>13</td>
</tr>
</tbody>
</table>

**Trend**

There were no significant changes in behavioral patterns of active media users in 2020. The share of most active users increased by just 1 pp and the percentage of respondent who prefer to share news in person declined 1 pp.

84% of respondents fell into the category of the most active media users in 2020.

**Insights**

Older respondents are less likely to be active media users: 51% of young people aged 14–29 are active media consumers (10 pp above the average).

44% of all respondents aged under 44 were among the most active media users (3 pp above the average).

The share of respondents in the 44 and over age group who prefer to share news in person (38%) or not to share news at all (23%) has increased.

The percentage of respondents who prefer not to share news either in person or online is 4 pp lower in Moscow and St. Petersburg than in all other cities.

Active media usage tends to increase in line with income levels. More than half of respondents (51%) who reported ‘high’ income were among the most active media users, for ‘medium’ income — 41% and for ‘low’ income — 32%.

Women are more likely to be among the most active media users than men (by 7 pp).
Media consumption in Russia – 2020

Media usage throughout the day

1. **What type of media do you prefer?**

2. **Average media usage**

   - **Weekday**
     - TV: 3 hrs 51 mins
     - Radio: 4 hrs 22 mins
     - Internet: 3 hrs 33 mins
     - Social media: 4 hrs 41 mins
     - Offline videos: 2 hrs 36 mins
     - E-books: 1 hr 42 mins
     - Print media: 1 hr 46 mins
     - Printed books: None
     - Video games: 3 hrs 33 mins

   - **Weekend**
     - TV: 4 hrs 04 mins
     - Radio: 4 hrs 36 mins
     - Internet: 3 hrs 41 mins
     - Social media: 1 hr 46 mins
     - Offline videos: 2 hrs 36 mins
     - E-books: 1 hr 42 mins
     - Print media: 1 hr 33 mins
     - Printed books: None
     - Video games: 1 hr 33 mins

3. **What type of media do you prefer?**

   - TV: 19% 11% 12% 14% 1% 1% 1% 1% 1% 39%
   - Radio: 16% 11% 28% 18% 4% 1% 1% 1% 1% 17%
   - Internet: 11% 8% 30% 23% 9% 2% 1% 2% 2% 4%
   - Social media: 23% 4% 20% 22% 16% 2% 3% 2% 4% 4%
   - Offline videos: 25% 2% 12% 18% 18% 2% 5% 4% 6% 8%
   - E-books: 25% 2% 6% 8% 7% 1% 2% 2% 2% 65%
   - Print media: 5% 2% 1% 1% 1% 1% 1% 1% 56%
   - Printed books: 31% 7% 19% 18% 4% 2% 1% 1% 2% 15%
   - Video games: 19% 7% 27% 21% 13% 1% 1% 1% 3% 7%
   - None of the above: 65% 2% 10% 17% 20% 2% 5% 3% 6% 10%

4. **Midnight to 6am**

   - TV: 15% 5% 8% 9% 3% 1% 1% 1% 1% 56%
   - Radio: 31% 7% 19% 18% 4% 2% 1% 1% 2% 15%
   - Internet: 19% 7% 27% 21% 13% 1% 1% 1% 3% 7%
   - Social media: 22% 3% 20% 22% 17% 2% 2% 2% 5% 5%
   - Offline videos: 25% 2% 10% 17% 20% 2% 5% 3% 6% 10%
   - E-books: 6% 2% 5% 6% 7% 1% 3% 2% 4% 64%
   - Print media: 6% 2% 5% 6% 7% 1% 3% 2% 4% 64%
   - Printed books: None
   - Video games: 6% 2% 5% 6% 7% 1% 3% 2% 4% 64%

The Internet remains the dominant media channel for Russians in 2020. Average usage on weekdays and at weekends increased by more than one hour.

The share of Russians watching television continues to decline (-3 pp vs. 2019); however, those that still watch TV spend more time with this media channel on weekends (by more than one hour on average), mainly due to the lockdown.

Russians play more video games on weekdays and at weekends (16 minutes and 46 minutes more respectively). The simultaneous 9 pp drop in the share of respondents who play video games and increase in playing time likely means that people who stopped gaming were casual gamers who did not spend much time playing. The popularity of video games continues to rise, and the decline in audience share is due to the loss of casual gamers who were likely to play video games to pass the time, for example, while commuting.

“I usually play video games for an hour or two in the morning to get my brain in gear for the working day ahead.”

Focus group (aged 18–25)
Media consumption practices

**Television**

I switch on the TV to find something to watch. If there is nothing interesting, I just leave it on in the background and/or watch the show that seems the most interesting, %

- Weekday: 32
- Weekend: 17

I switch on the TV to watch a specific program, %

- Weekday: 24
- Weekend: 22

I switch on the TV to find something to watch. If there is nothing interesting, I turn it off, %

- Weekday: 23
- Weekend: 24

I leave the TV on in the background, %

- Weekday: 16
- Weekend: 12

I only watch TV when I have company, %

- Weekday: 5
- Weekend: 5

TV viewing habits and radio listening behavior and preferences have not changed significantly compared to 2019.

Also, compared to 2019, haven’t changed respondents’ habits regarding places where they prefer to listen to the radio.

Respondents were more likely to listen to the radio while driving (42%) on weekdays. At weekends, 45% of respondents said they prefer to listen to the radio at home.

**Internet**

I go online often and for extended periods of time, %

- Weekday: 63
- Weekend: 58

I go online often, but only for short periods of time, %

- Weekday: 15
- Weekend: 19

I go online, but when I do, I stay online for extended periods of time, %

- Weekday: 9
- Weekend: 10

I rarely go online, but when I do, I stay online for extended periods of time, %

- Weekday: 13
- Weekend: 13

**Radio**

I listen to the radio while driving, %

- Weekday: 32
- Weekend: 29

I listen to the radio at home, %

- Weekday: 43
- Weekend: 44

I listen to the radio at work, %

- Weekday: 19
- Weekend: 20

I listen to the radio on public transport, %

- Weekday: 24
- Weekend: 25

I listen to the radio while walking, %

- Weekday: 16
- Weekend: 13

I listen to the radio while driving, %

- Weekday: 12
- Weekend: 5

**Print media**

I read free print media, %

- Weekday: 28
- Weekend: 13

I buy specific print media publications, but not regularly, %

- Weekday: 22
- Weekend: 15

I do not buy print media but I read what my friends buy, %

- Weekday: 14
- Weekend: 12

I purchase specific print media publications on a regular basis, %

- Weekday: 10
- Weekend: 10

I purchase print media to pass the time, %

- Weekday: 12
- Weekend: 10

I have subscriptions to certain print media items, %

- Weekday: 10
- Weekend: 10
Changes in media consumption in 2016–2020

The media usage index¹, pp

Trends
Russians’ subjective assessment of how they consumed media changed significantly in 2020 due to the lockdown: 96% of respondents said that they are using the Internet (social media/video/search requests) more extensively.

Although the television audience declined by 3 pp compared to 2019, those who still watch television increased their consumption considerably (+28 pp vs. 2019). This is evidenced by the overall increase in the time spent watching TV (by an average of 1 hour vs. 2019).

The rise in the use of e-books has also slowed down considerably (-28 pp vs. 2019). This may be due to the impact of remote working as access to public transport networks (the most popular place for reading e-books) was restricted because of COVID-19.

Russians are reading more printed books and print media. The media usage index for printed books and print media increased by an average of 6% and 4% respectively.

It’s a similar story with video games. Our survey shows that while the share of respondents who play video games fell this year, respondents reported an increase in video game usage (+11%), which is also affirmed by an increase in the time spent gaming (by an average of 30 minutes vs. 2019).

The rise in the use of e-books has also slowed down considerably (-28 pp vs. 2019). This may be due to the impact of remote working as access to public transport networks (the most popular place for reading e-books) was restricted because of COVID-19.

Russians are reading more printed books and print media. The media usage index for printed books and print media increased by an average of 6% and 4% respectively.

How has your media usage changed? (%)

<table>
<thead>
<tr>
<th>Media type</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet¹</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>+66</td>
<td>+62</td>
</tr>
<tr>
<td>Television</td>
<td>+28</td>
<td>-4</td>
<td>-7</td>
<td>-11</td>
<td>-8</td>
</tr>
<tr>
<td>Average index</td>
<td>+23</td>
<td>+9</td>
<td>+7</td>
<td>+5</td>
<td>+6</td>
</tr>
<tr>
<td>Video games</td>
<td>+11</td>
<td>+7</td>
<td>+4</td>
<td>+6</td>
<td>+4</td>
</tr>
<tr>
<td>Radio</td>
<td>+10</td>
<td>+2</td>
<td>0</td>
<td>-3</td>
<td>-4</td>
</tr>
<tr>
<td>E-books</td>
<td>+9</td>
<td>+27</td>
<td>+29</td>
<td>+29</td>
<td>+31</td>
</tr>
<tr>
<td>Printed books</td>
<td>+6</td>
<td>-9</td>
<td>-12</td>
<td>-18</td>
<td>-16</td>
</tr>
<tr>
<td>Print media</td>
<td>+4</td>
<td>-20</td>
<td>-26</td>
<td>-22</td>
<td>-24</td>
</tr>
<tr>
<td>Cinema</td>
<td>-</td>
<td>+4</td>
<td>+4</td>
<td>+3</td>
<td>0</td>
</tr>
<tr>
<td>Theaters/concerts</td>
<td>-</td>
<td>+2</td>
<td>+6</td>
<td>-2</td>
<td>0</td>
</tr>
</tbody>
</table>

Higher usage

Lower usage

Insights
The Urals and Volga federal districts recorded the highest increases in TV usage (33% each). The rise in radio usage was 4 pp above the average in the Volga federal district (+14%). The Central federal district also saw an above average growth in radio listenership (+13%). The most significant increase in social media usage was recorded in the North Caucasus and Siberian federal districts with +34% and +32% respectively (the average increase in Russia was +27%).

Video games usage is growing at a similar pace across all federal districts, with the exception of the North Caucasian federal district, where growth was lower at +5%. Russians aged 14–29 reported the highest increase in video game usage (+14%).

Respondents aged 14–29 also indicated the largest increase in TV usage (+30%) of all the age groups.

¹ The media usage index is calculated as follows: [the percentage of respondents who indicated higher usage minus the percentage indicating lower usage]
² To search for information, communicate on social media, and watch videos online
Video games

Popularity of video games

Trends
A significant percentage of respondents aged under 44 play both online and offline games. However, the older respondents get, the more likely they are to express a preference for either online or offline games.

Muscovites continue to be the most active players of online games (40%), while the popularity of offline games declined in the capital (-12 pp vs. 2019).

Offline games are still more popular in small towns with a population of less than 500,000 people (42%). Older generations reported a substantial growth in the popularity of offline and online games (from 27% and 31% respectively in 2019 to 40% for both in 2020).

Though men are more likely than women to play video games for entertainment, there is only a minor difference in the preferences of male and female gamers: women are slightly more inclined to play offline games (by 2 pp) and men slightly more likely to play online games (by 2 pp).

Insights
82% of respondents play video games for entertainment, which is similar to last year.

Just like last year, about one third of respondents play online games to relax, while the share of respondents who play offline games for this purpose has increased by 10 pp.

“Personally, I rarely play video games, but I played a couple of times during the lockdown when I was bored. However, my little brother played online games nonstop for twenty-four hours a day in the summer.”

“I generally commuted to work by car during the lockdown. I sometimes used to play games on my mobile on public transport, but now that I’m driving, I obviously can’t do that anymore.”

“During the lockdown, my friends played nonstop for weeks. They are gamers and it’s like their hobby or something.”

“At the beginning of the quarantine, video games were virtually the only way I could communicate with my friends. We used to sit and play together while chatting on Skype. When the situation began to improve, we spent considerably less time playing games.”

Focus group (aged 18–55)
Data content and usage patterns

News sources
- News source ranking by trust level
- Attitudes towards the media: Russian or foreign source?
- The most popular content for each media
- Frequency of visits to Internet resources
- Popularity of Internet resources

Video content

Technology and media consumption

Attitudes towards advertising

Media consumption in figures

Contacts
### News sources

**Top three news sources in Russia**

- **Internet (news, analytical, official websites)**: 72% in 2020
- **Television**: 58% in 2020
- **Internet (social media and blogs)**: 40% in 2020

Respondents of all ages, including young people (14–24) and older generations (over 65), named official news websites (analytical and news websites) as a key news source. However, the older the audience, the higher the engagement with this type of news source. Television still ranks in second place. The Internet is a more important news source than television for young people (under 34), while older generations actively consume television news.

Social media and blogs is a popular source of information for younger audiences aged 14–24 and 25–34. Interest in this type of news decreases as the age of respondents rises.

**Change in the importance of news sources**

The importance of social media and blogs is increasing every year. For example, it has increased by 10 pp compared to 2018 (and by 3 pp compared to 2019). However, while the highest increase in 2019 was among younger respondents (aged under 34), the most notable increase this year was among people over 65.

In contrast, the importance of news portals and websites declined for all age groups.

**Please select the top two sources you go to for the news (%)**

- **Internet (official websites)**
- **Internet (social media and blogs)**
- **Print media**
- **Radio**
- **Television**

**“It is worth noting that people’s interest has returned to traditional media outlets, especially Russian outlets—volatility in the currency markets, various macroeconomic events, up-to-date and verified information about the epidemiological situation—all these helped boost the user base for outlets such as Lenta, Gazeta and RBC.”**

Rafael Abramyan
CEO, Rambler Group

**“I use to just have the news on in the background, now I am interested in actively following it.”**

**“I listened to a podcast for the first time during the pandemic and liked it. Podcasts give you the chance to delve into a topic you don’t know much about for quite a short period of time and in sufficient detail.”**

**“I still listen to the news each morning before going to work. Usually, I watch TV news but lately I’ve started using more news websites.”**

Focus group (aged 18–55)
Media source ranking by trust level

If different news sources report on the same event differently, which source would you believe? Which news source do you trust the most?

### Trends
The Internet, and specifically news, analytical and official websites, is the most trusted news source (trusted by 39% of respondents). Respondents aged 35–39 and 45–49 expressed the greatest trust in information from new, analytical and official websites.

Television is the second most trusted new sources. Although television continued to lose trust in 2020 (-5 pp vs. last year), it is still more trusted than social media, radio and newspapers.

### Insights
Muscovites (20%), residents of other large cities (21%), and students (15%) have the lowest levels of trust in television. People living in the North Caucasian federal district (28%) reported the highest level of trust in television. Respondents aged 55–59 (32%) and over 65s (36%), servicemen and civil servants (36%), and pensioners (32%) have had the highest level of trust in television in previous years.

Respondents aged 14–29 have significantly less trust in online news and analytical websites (36%) than those aged 45–59 (43%).

Residents of the Far East federal district have the lowest level of trust in online, analytical and official websites (29%) than those aged 45–59 (43%).

Residents of the Far East federal district have the lowest level of trust in online, analytical and official websites (29%). Employed respondents have more trust in online news and analytical articles (by 4 pp) than unemployed respondents (41% vs. 37%).

Residents of small towns (less than 500,000 people) are more trusting of news from social media than residents of large cities (17%). 20% of respondents aged 14–29 have more trust in news from social media.

Respondents with higher education have less trust in news from social media (by 2 pp) than those with secondary education (15% vs. 17%).

### Focus group (aged 18–35)

**The Internet is the main source of information for me, especially social media, Twitter and Telegram. However, these days, I have more trust in western media.**

**I used to read magazine articles just because they had exclusive information not available elsewhere. I don’t generally read newspapers or magazines now as each outlet has its own website where you can find anything you want.**
Attitudes towards the media: Russian or foreign source?

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer Russian sources, %</td>
<td>56</td>
<td>59</td>
<td>58</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>I prefer foreign sources, %</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>It doesn’t matter, %</td>
<td>36</td>
<td>36</td>
<td>36</td>
<td>36</td>
<td>32</td>
</tr>
</tbody>
</table>

Preferred Russian and foreign news sources in 2020, %

- Average
- TV
- Radio
- Newspapers
- Magazines
- News and analytical websites
- Social media, blogs
- Public opinion

Trends
Similarly to the results of 2019, 64% of respondents say it matters where information comes from.
- Despite a steady decline over the past five years (-6 pp since 2015), the majority (56%) still prefer Russian sources. The most popular Russian news sources are newspapers (60%) and television (57%).
- The share of respondents who prefer foreign sources remains relatively small at 8% for the second year running.
- 10% of respondents prefer foreign news and analytical websites and 8% prefer foreign social media networks.

Insights
Respondents aged over 65 prefer Russian online news sources (67%). Respondents from small cities had the highest preference for Russian television (2 pp above the average). 38% of Muscovites said that it didn’t matter whether news sources are Russian or foreign.

Higher income respondents have a greater preference for foreign television channels (5 pp above the average).

Women are more likely to trust Russian magazines and newspapers (by 2 pp) than men.

“I only prefer western media if I want to know something about their internal events. However, I prefer our (Russian) sources for any news about Russia as western sources do not always have full and reliable information about what is really going on here.”

Focus group (aged 18–35)
The most popular content for each media

**Television**

<table>
<thead>
<tr>
<th>Content</th>
<th>Average frequency per week</th>
<th>Average time spent per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV series</td>
<td>3.1 times</td>
<td>2 hrs 12 mins</td>
</tr>
<tr>
<td>Movies</td>
<td>3.9 times</td>
<td>2 hrs 10 mins</td>
</tr>
<tr>
<td>General news (daily news)</td>
<td>4.0 times</td>
<td>58 mins</td>
</tr>
</tbody>
</table>

**Radio**

<table>
<thead>
<tr>
<th>Language</th>
<th>Average frequency per week</th>
<th>Average time spent per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign music</td>
<td>3.6 times</td>
<td>1 hrs 07 mins</td>
</tr>
<tr>
<td>Russian music</td>
<td>3.5 times</td>
<td>1 hrs 06 mins</td>
</tr>
<tr>
<td>Newscasts (news, weather)</td>
<td>3.5 times</td>
<td>33 mins</td>
</tr>
</tbody>
</table>

**Print media**

<table>
<thead>
<tr>
<th>Content</th>
<th>Average frequency per week</th>
<th>Average time spent per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Popular science and educational content</td>
<td>1.8 times</td>
<td>32 mins</td>
</tr>
<tr>
<td>Politics and society</td>
<td>1.9 times</td>
<td>29 mins</td>
</tr>
<tr>
<td>General news</td>
<td>2.3 times</td>
<td>27 mins</td>
</tr>
</tbody>
</table>

**Online podcasts**

<table>
<thead>
<tr>
<th>Content</th>
<th>Average frequency per week</th>
<th>Average time spent per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movies, music, art</td>
<td>2.2 times</td>
<td>49 mins</td>
</tr>
<tr>
<td>Popular science and educational content</td>
<td>1.9 times</td>
<td>45 mins</td>
</tr>
<tr>
<td>General news</td>
<td>2.4 times</td>
<td>37 mins</td>
</tr>
</tbody>
</table>

TV series are more popular with residents of cities with 500,000 to one million inhabitants (who watch them 3.3 times a week on average). Residents of the Volga and Siberian federal districts have the highest interest in TV series (watching them 3.3 times a week).

Women tend to watch TV series more often than men (3.3 times a week vs. 3 times). Unemployed and employed watch TV series 3.4 times and 3 times a week respectively.

Residents of the Far East federal district are most active movie watchers in Russia (4.4 times a week). Respondents aged 14–29 watch movies on TV less frequently (3.2 times a week vs. 3.9 times for the average respondent).

The higher a respondent's income, the more likely they are to listen to Russian music on the radio (lower income respondents listen 3.1 times a week while those with higher incomes tuned in 4.1 times a week).

**Online podcasts**

Respondents spent more time listening to podcasts this year (4 minutes more than last year). However, the average listening time for the top categories (news, movies, music and art) decreased by 4 minutes.

---

1 Average frequency per week
2 Average time spent per day
Frequency of visits to Internet resources

How often do you perform the following online activities?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage of users (%)</th>
<th>6–7 days per week</th>
<th>3–5 days per week</th>
<th>1–2 days per week</th>
<th>Less than 3 days per month</th>
</tr>
</thead>
<tbody>
<tr>
<td>I search for information, including information I need for work/education</td>
<td>98%</td>
<td>53%</td>
<td>23%</td>
<td>16%</td>
<td>6%</td>
</tr>
<tr>
<td>I search for information I need for personal needs (government services, Internet banking, etc.)</td>
<td>95%</td>
<td>10%</td>
<td>18%</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>I check for updates on my personal social media accounts</td>
<td>94%</td>
<td>54%</td>
<td>17%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>I watch movies/videos</td>
<td>93%</td>
<td>28%</td>
<td>24%</td>
<td>26%</td>
<td>7%</td>
</tr>
<tr>
<td>I use the Internet for social/informal communication¹</td>
<td>92%</td>
<td>38%</td>
<td>24%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>I use the Internet for business/formal communication¹</td>
<td>90%</td>
<td>39%</td>
<td>24%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>I listen to the radio/music</td>
<td>87%</td>
<td>24%</td>
<td>21%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>I make purchases online</td>
<td>86%</td>
<td>6%</td>
<td>9%</td>
<td>23%</td>
<td>48%</td>
</tr>
<tr>
<td>I read news, newspapers, books, blogs</td>
<td>86%</td>
<td>31%</td>
<td>21%</td>
<td>25%</td>
<td>14%</td>
</tr>
<tr>
<td>I use the Internet for work, earning income</td>
<td>84%</td>
<td>34%</td>
<td>24%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>No specific purpose</td>
<td>72%</td>
<td>26%</td>
<td>15%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>I download movies and videos</td>
<td>70%</td>
<td>10%</td>
<td>11%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>I download music</td>
<td>68%</td>
<td>8%</td>
<td>9%</td>
<td>18%</td>
<td>33%</td>
</tr>
<tr>
<td>I download books</td>
<td>58%</td>
<td>5%</td>
<td>7%</td>
<td>14%</td>
<td>32%</td>
</tr>
<tr>
<td>I listen to podcasts</td>
<td>53%</td>
<td>7%</td>
<td>10%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>I only browse the web with my friends/colleagues/acquaintances</td>
<td>24%</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

¹ Skype, email, blogs, forums, social media

Trends

In Russia, the main reasons for using the Internet are to search for specific information and check for updates on personal social media accounts. 34% of respondents go online for work purposes on weekends.

Insights

People aged 16–29 represent the highest share of respondents who go online for work (88%).

The share of users increased for almost all types of Internet activity. Podcasts (from 37% to 53%), watching movies/videos (from 50% to 70%), online shopping (from 74% to 86%) and music/radio (from 73% to 87%) saw the biggest growth.

“The 2020 coronavirus pandemic has acted as a catalyst for the key Internet consumption trends of the last several years. Categories such as online shopping, online learning, movie streaming and online food ordering have been major points on web analysts’ radars for quite some time now due to the rapid penetration of the mobile Internet (4G or even 5G), easier online payment options, and cheaper, high-quality devices that let people access these services. Moreover, the wave of global quarantine and social distancing measures has spurred the intensive growth of these categories, both in terms of the usage metrics and investment attractiveness of the top services in these categories. However, this year has also brought a set of unexpected “winners” and “losers” that do not correspond with the trends of previous years. The losers obviously include all services related to mobility: taxis, car sharing and tourism. The winners include teleconferencing and remote access services.”

Rafael Abramyan
CEO, Rambler Group
## Popularity of Internet resources

### Please specify which Internet resources you use

<table>
<thead>
<tr>
<th>Usage</th>
<th>Change vs. 2019</th>
<th>Age groups</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Aged 14–29</td>
<td>Aged 30–44</td>
<td>Aged 45–59</td>
<td>60+</td>
<td></td>
</tr>
<tr>
<td>YouTube</td>
<td>87%</td>
<td>2 pp</td>
<td>85%</td>
<td>87%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>VKонтакте</td>
<td>85%</td>
<td>5 pp</td>
<td>93%</td>
<td>87%</td>
<td>79%</td>
<td>73%</td>
</tr>
<tr>
<td>Instagram</td>
<td>59%</td>
<td>7 pp</td>
<td>73%</td>
<td>58%</td>
<td>53%</td>
<td>45%</td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td>55%</td>
<td>-2 pp</td>
<td>34%</td>
<td>55%</td>
<td>66%</td>
<td>72%</td>
</tr>
<tr>
<td>Facebook</td>
<td>46%</td>
<td>11 pp</td>
<td>48%</td>
<td>36%</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>Telegram</td>
<td>36%</td>
<td>-1 pp</td>
<td>20%</td>
<td>33%</td>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td>News websites</td>
<td>33%</td>
<td>4 pp</td>
<td>19%</td>
<td>20%</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Twitter</td>
<td>22%</td>
<td>17 pp</td>
<td>28%</td>
<td>23%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>TikTok</td>
<td>21%</td>
<td>2 pp</td>
<td>16%</td>
<td>11%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Livejournal</td>
<td>8%</td>
<td>1 pp</td>
<td>4%</td>
<td>8%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>7%</td>
<td>1 pp</td>
<td>13%</td>
<td>7%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>6%</td>
<td>0 pp</td>
<td>4%</td>
<td>5%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Moi Krug</td>
<td>6%</td>
<td>1 pp</td>
<td>3%</td>
<td>5%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Stream (Twitch, GoodGame)</td>
<td>6%</td>
<td>1 pp</td>
<td>10%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Periscope</td>
<td>2%</td>
<td>-</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>2%</td>
<td>-</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>-</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

### How much time do you spend online on weekdays and at weekends?

<table>
<thead>
<tr>
<th>Percentage of users</th>
<th>Weekday</th>
<th>Weekend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 30 mins</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>From 30 mins to 1 hr</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>1–2 hrs</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>3–4 hrs</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>5–6 hrs</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Over 6 hrs</td>
<td>24%</td>
<td>30%</td>
</tr>
</tbody>
</table>

### Insights

YouTube and VKонтакте are still the most popular Internet resources, attracting 87% and 85% of respondents respectively, followed by Instagram (+7 pp vs. 2019), Odnoklassniki (-2 pp) and Facebook (+2 pp).

Telegram has retained its popularity among Russians (36%). The number of Telegram users continues to rise every year, with a particular boost this year after the Russian government officially unblocked it in June 2020.

VKонтакте is most popular with respondents aged 14–29, while Facebook is most popular with respondents aged over 60.

The various resources boosted their user share by an average of 3.4 pp compared to 2019. TikTok and Telegram saw significant growth (+17 pp and +11 pp, respectively).
Video content

Which of the following resources do you use to watch video content?

<table>
<thead>
<tr>
<th>Usage in 2020</th>
<th>Age groups</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aged 14–29</td>
<td>Aged 30–44</td>
<td>Aged 45–59</td>
<td>60+</td>
</tr>
<tr>
<td>YouTube</td>
<td>92%</td>
<td>95%</td>
<td>92%</td>
<td>91%</td>
</tr>
<tr>
<td>VKontakte</td>
<td>33%</td>
<td>43%</td>
<td>36%</td>
<td>23%</td>
</tr>
<tr>
<td>Yandex</td>
<td>25%</td>
<td>19%</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>Instagram</td>
<td>15%</td>
<td>26%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td>14%</td>
<td>8%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Movie streaming services</td>
<td>14%</td>
<td>10%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Other websites with TV series and movies</td>
<td>11%</td>
<td>12%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Kinopoisk</td>
<td>11%</td>
<td>7%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>TikTok</td>
<td>9%</td>
<td>17%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Facebook</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>RuTube</td>
<td>4%</td>
<td>1%</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Twitch</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Trend

The top three online video resources remained unchanged in 2020. Instagram overtook Odnoklassniki to become the fourth most popular resource for video content.

Users have begun to use TikTok much more often this year (3% in 2019 vs. 9% in 2020).

*“I don’t usually watch videos online like young people do. I only watch movies, and sometimes interviews online. If I need some background noise, I switch on the TV.”*

*“I started watching more TV series during the pandemic and decided to try out a paid subscription. It is quite convenient and offers various user advantages.”*

Focus group (aged 18–55)

Insights

Young respondents are far more likely to use TikTok than older generations. 17% of respondents aged 14–29 use this platform to watch videos, compared to only 5% of respondents aged 45–59.

Older respondents tend to use resources that they are already familiar with, such as Yandex (44% for those aged over 60), Odnoklassniki (19% for those aged over 45), Kinopoisk and Rutube (14% and 11% respectively for respondents aged over 60).

Due to changes in the data collection method, we are not able to provide a comparison against last year’s results.
Technology and media consumption
Attitudes towards new gadgets

Would you describe yourself as a gadget enthusiast? Please select the statement that most applies to you.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer tried-and-tested, market-proven devices to the latest trends</td>
<td>32</td>
<td>39</td>
<td>35</td>
<td>39</td>
<td>39</td>
<td>35</td>
</tr>
<tr>
<td>I conduct extensive research before buying new gadgets to select the best one</td>
<td>28</td>
<td>28</td>
<td>30</td>
<td>29</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>I like to buy new gadgets before they go mainstream</td>
<td>18</td>
<td>13</td>
<td>14</td>
<td>11</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>I will only buy a new device once it has gone mainstream and all other devices are completely obsolete</td>
<td>9</td>
<td>7</td>
<td>9</td>
<td>10</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>I do not typically buy devices myself. It is usually a gift, a company-provided device or other</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>4</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>I buy new gadgets as soon as they appear on the market. I like to be one of the first adopters</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Trend
The majority of respondents still preferring tried-and-tested devices (32%) to new products. However, the share of respondents taking this approach decreased by 7 pp compared to 2019 and is now just 4 pp higher than the share who conduct extensive research before buying new gadgets.

Moreover, the number of respondents who like to buy new gadgets before they go mainstream has increased (18% vs. 13% in 2019).

The share of those who like to buy new gadgets as soon as they appear on the market also increased by 2 pp but still accounts for only 5–6% of all respondents.

Insights
As in previous years, most early adopters live in million-plus cities. The share of early adopters falls from 10% in the largest cities to 2% in smaller cities. 19% of business owners said that they often buy the latest devices.

Men tend to buy more new gadgets than women. Enthusiasm for gadgets also tends to increase in line with income levels.

Thus, for example, this year, people with higher incomes were 16 pp more likely to identify as first adopters of new gadgets than last year, whereas for less well-off respondents, the increase was just 2 pp.

Residents of small towns, pensioners, homemakers and those with low incomes prefer tried-and-tested devices (2, 4, 12, and 8 pp above the average respectively).
**Russian household ownership of media devices**

**Trend**

The most common devices in Russian households remain unchanged. These include:

- **Television** remains the most commonly owned device (97%). TV ownership increased by 2 pp this year and the usage index¹ was 86% (+4 pp vs. last year). Unlike last year, TV usage did not decline in 2020. Importantly, Russians are increasingly using their TV sets to access the Internet (+12 pp) and watch online videos.

- **Smartphone** are still the most widely used device in Russia. 95% of respondents reported owning this device. Smartphone penetration on the Russian market increased by 4 pp in 2020, while the smartphone usage index gained 3 pp (up to 92%), making smartphones the most popular device.

- **PCs** (80%) и **laptops** (80%) round out the top three. The usage index for these devices is 69% and 70% respectively.

**Insights**

TV became more popular with young people aged 14–19 this year (the usage index increased by 12 pp). Television usage is also higher among respondents who live with children (by 10 pp) compared to those who live alone. This growth in TV usage may be have been driven by the long lockdown.

Similarly to last year, smartphone usage increased most among pensioners (by 9 pp). Muscovites, respondents aged 30–34 and those with higher incomes are still the most active users of game consoles (10–20 pp above the average). Men use game consoles almost twice as often as women.

Respondents on higher incomes reported higher usage of Smart Home systems (+22 pp compared to those on lower incomes).

---

¹ The usage index: (the share of respondents who own and use a device minus the share of those who own a device without using it)
Which device do you use to watch TV? How often?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Time per day:</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV set</td>
<td>97%</td>
<td>5.5 days per week</td>
</tr>
<tr>
<td>Smartphone</td>
<td>70%</td>
<td>3.6 days per week</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>65%</td>
<td>2.9 days per week</td>
</tr>
<tr>
<td>Laptop</td>
<td>64%</td>
<td>2.8 days per week</td>
</tr>
<tr>
<td>Tablet</td>
<td>41%</td>
<td>1.5 days per week</td>
</tr>
</tbody>
</table>

Which device do you use to surf the Internet? How often?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Time per day:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>92%</td>
<td>5.5 days per week</td>
</tr>
<tr>
<td>Laptop</td>
<td>77%</td>
<td>3.9 days per week</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>70%</td>
<td>3.7 days per week</td>
</tr>
<tr>
<td>Tablet</td>
<td>50%</td>
<td>2.0 days per week</td>
</tr>
<tr>
<td>TV set</td>
<td>59%</td>
<td>2.8 days per week</td>
</tr>
</tbody>
</table>

Which device do you use to play video games? How often?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Time per day:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>30%</td>
<td>4.3 days per week</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>27%</td>
<td>4.1 days per week</td>
</tr>
<tr>
<td>Laptop</td>
<td>24%</td>
<td>4.0 days per week</td>
</tr>
<tr>
<td>Tablet</td>
<td>17%</td>
<td>3.3 days per week</td>
</tr>
<tr>
<td>Game console</td>
<td>15%</td>
<td>3.2 days per week</td>
</tr>
</tbody>
</table>

Which device do you use to listen to the radio?

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
<th>Time per day:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car stereo</td>
<td>41%</td>
<td>1 hr 39 mins</td>
</tr>
<tr>
<td>Radio at home</td>
<td>23%</td>
<td>2 hrs 53 mins</td>
</tr>
<tr>
<td>Mobile phone / Smartphone</td>
<td>16%</td>
<td>2 hrs 55 mins</td>
</tr>
<tr>
<td>Desktop PC</td>
<td>14%</td>
<td>1 hr 39 mins</td>
</tr>
<tr>
<td>Portable player (Pod, etc.)</td>
<td>6%</td>
<td>2 hrs 18 mins</td>
</tr>
</tbody>
</table>
In 2019, 29% of respondents aged 35–39 used their tablets to watch online videos. This age group is still more likely to watch videos on tablets than any other, though usage decreased slightly in 2020 to 23%.

In 2020, older age categories (people aged 45 and over) were still more likely to watch videos using PCs and/or laptops. The percentage doing so soared to 70% this year from 52% in 2019.

PCs and/or laptops are also popular with respondents with higher education (65%). Other respondents prefer using their smartphones (62%).

Which devices do you use to watch videos online?

<table>
<thead>
<tr>
<th>Device</th>
<th>Usage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>58%</td>
</tr>
<tr>
<td>PC/Laptop</td>
<td>63%</td>
</tr>
<tr>
<td>Tablet</td>
<td>17%</td>
</tr>
<tr>
<td>TV set</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Trend**

PCs and laptops became the most popular devices for watching videos online this year (63%), pushing smartphones down to second place (62% in 2019, -5 pp this year).

The share of respondents who use tablets and TVs for watching online videos decreased compared to 2019 (-7 pp for tablets and -3 pp for TVs/Smart TVs).

**Insights**

Only half (50%) of respondents from Moscow and St. Petersburg use their smartphones to watch videos (8 pp below the average). Residents of the Far East federal district are least likely to use laptops and/or PCs to watch videos (57%, 6 pp below the average).

Residents of the Northwestern federal district are more likely to use tablets to watch videos (23%) than any other region, while residents of the North Caucasian federal district are the most prolific watchers on smartphones (71%).

Women are 7 pp more likely to watch online videos on smartphones than men (61%), but are less likely to watch them on PCs and laptops (9 pp less vs. men).

Smartphones are the most popular devices for watching online videos among respondents aged 20–24 (85%). This is up 3 pp from 2019.

In 2019, 29% of respondents aged 35–39 used their tablets to watch online videos. This age group is still watches online videos on tablets more than any other, though usage decreased slightly in 2020 to 23%.

In 2020, older age categories (people aged 45 and over) were still more likely to watch videos using PCs and/or laptops. The percentage doing so soared to 70% this year from 52% in 2019.

PCs and/or laptops are also popular with respondents with higher education (65%). Other respondents prefer using their smartphones (62%).
**Popularity of smartphone features**

Which smartphone features do you use more often and which do you use less often?

<table>
<thead>
<tr>
<th>Feature</th>
<th>More frequent use, %</th>
<th>Less frequent use, %</th>
<th>Feature usage index 1, %</th>
<th>Annual change, pp</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instant messengers</td>
<td>42</td>
<td>5</td>
<td>37</td>
<td>-10</td>
</tr>
<tr>
<td>Social media apps</td>
<td>35</td>
<td>6</td>
<td>29</td>
<td>+10</td>
</tr>
<tr>
<td>Internet calls</td>
<td>33</td>
<td>7</td>
<td>26</td>
<td>-5</td>
</tr>
<tr>
<td>Mobile banking</td>
<td>27</td>
<td>5</td>
<td>21</td>
<td>+1</td>
</tr>
<tr>
<td>Mobile calls</td>
<td>19</td>
<td>12</td>
<td>7</td>
<td>+1</td>
</tr>
<tr>
<td>Text messages</td>
<td>17</td>
<td>14</td>
<td>4</td>
<td>+42</td>
</tr>
<tr>
<td>Video game</td>
<td>17</td>
<td>9</td>
<td>8</td>
<td>+31</td>
</tr>
</tbody>
</table>

**Trend**

Instant messengers were the number one smartphone feature for the third consecutive year, with 42% of respondents indicating more frequent use compared to last year. However, the feature usage index decreased by 10 pp to 37%. Social media apps (29%) and banking apps (21%) also continue to gain ground.

The usage index for Internet calls decreased by 5 pp to 26%.

Text messages, video games and mobile calls are the least popular features, even though the usage index for video games and text messages increased significantly over the last year.

**Insights**

Mobile calls are more popular with Russians aged 30–34 and less so with young people (-8%).

Residents of Moscow and St. Petersburg make mobile calls more frequently (the feature usage index increased by 11 pp and 13 pp respectively). Last year, mobile calls were less popular among residents of Moscow and St. Petersburg and remained unchanged in other cities. This year, it was residents of small towns who made fewer calls, but his numbers are rising as before (+3 pp or +9 pp in different cities).

Women are still more likely to use social media apps (by 18 pp) than men.

Social media apps are most popular with young people aged 14–24 (18–36 pp above the average). The popularity of these apps declines as the age of the respondents increases. The usage index for social media apps is just 11% for people aged over 65.

Internet calls and mobile calls are more popular among respondents with higher incomes (feature usage index of 29% and 13% respectively). Instant messengers are popular with both high and medium income respondents (41%).
Which instant messengers do you have installed on your smartphone?
Which ones do you actually use?

**Trend**
Russians still have an average of four messengers installed on their phones. WhatsApp (88%), Viber (62%), Skype (52%), and Telegram (50%) are the most popular. It’s worth noting that Telegram recorded the highest spike in popularity (+10 pp) this year, while the popularity of Skype decreased by 1 pp vs. 2019.

WhatsApp is the most popular messaging app. Its usage index is 84%, much higher than that of any of its closest competitors. The usage indexes of Viber and Telegram are considerably lower at 55% and 41%, respectively.

Google Hangouts and Apple iMessage are messaging apps with relatively low usage indexes despite a significant share of respondents having them preinstalled on their smartphones (depending on the operating system). 11% of respondents use Google Hangouts and 12% use Apple iMessage.

**Insights**
Last year, Muscovites were most likely to use Telegram. The messenger grew in popularity with residents of St. Petersburg in the period under review (4 pp above the average). Telegram is also more popular with young people aged 14–24 and students (both 8 pp above the average). The popularity of the messenger tends to decline with the age of respondents. For example, Telegram’s usage index among respondents aged over 60 is 24 pp below the national average.

WhatsApp is most popular in the Far East and North Caucasian federal districts. This popularity of this messenger in these regions is 4 pp higher than the national average.

Men are more likely to use Skype and Discord than women (two and three times respectively), while women prefer Snapchat (by 3 pp).

Facebook Messenger is popular with people on high incomes and its popularity grows in line with rising income levels (from 10% to 25%).

---

1 The usage index: \([\text{the percentage of respondents who have installed a messenger and use it, minus the percentage who have installed a messenger but do not use it}]\)
### Access to media channels by connection type

#### Internet connection
- **Wireless Internet (Wi-Fi), %**
  - 2020: 53
  - 2019: 53
  - 2018: 51
  - 2017: 47
  - 2016: 47

- **Dedicated line (direct cable connection), %**
  - 2020: 43
  - 2019: 42
  - 2018: 42
  - 2017: 48
  - 2016: 46

- **Mobile Internet (via smartphone, GSM-modem, LTE/4G), %**
  - 2020: 41
  - 2019: 35
  - 2018: 36
  - 2017: 31
  - 2016: 27

- **Modem connection (via telephone line), %**
  - 2020: 16
  - 2019: 14
  - 2018: 13
  - 2017: 13
  - 2016: 14

- **ADSL connection (high bit rate access via modem), %**
  - 2020: 8
  - 2019: 11
  - 2018: 11
  - 2017: 12
  - 2016: 12

#### TV connection
- **Online TV (%): most often used in the Far East and Urals federal district (54% and 47% respectively)**
  - 2020: 43
  - 2019: 41
  - 2018: 38
  - 2017: 36
  - 2016: 35

- **Personal cable (%): most often used in the Volga federal district (38%). Least often used in the North Caucasian federal district (19%)**
  - 2020: 30
  - 2019: 35
  - 2018: 34
  - 2017: 35
  - 2016: 35

- **Community antenna (%): most often used in the Northwestern, Southern and North Caucasian federal districts (26%)**
  - 2020: 23
  - 2019: 27
  - 2018: 32
  - 2017: 28
  - 2016: 28

- **Satellite TV (%): most often used in the North Caucasian and Southern federal district (30% and 25% respectively)**
  - 2020: 19
  - 2019: 24
  - 2018: 24
  - 2017: 26
  - 2016: 24

#### Radio connection
- **Car stereo, %**
  - 2020: 41
  - 2019: 49
  - 2018: 50
  - 2017: 51
  - 2016: 48

- **Radio at home, %**
  - 2020: 30
  - 2019: 29
  - 2018: 32
  - 2017: 36
  - 2016: 35

- **Mobile device, %**
  - 2020: 16
  - 2019: 21
  - 2018: 22
  - 2017: 16
  - 2016: 16

- **Internet (PC users), %**
  - 2020: 14
  - 2019: 20
  - 2018: 21
  - 2017: 14
  - 2016: 14

- **Portable player, %**
  - 2020: 6
  - 2019: 6
  - 2018: 7
  - 2017: 6
  - 2016: 6
Attitudes towards advertising
### Tolerance and perceived usefulness of various advertising channels

#### Tolerance
Russians are generally positive towards ads that do not invade their personal space. Respondents were therefore generally positive towards outdoor ads (11%), search ads (6%) and ads in print media (6%). Social media ads (-3%), website ads (-4%), mobile ads (-9%), and e-mail ads (-6%) are viewed more negatively, turning very negative when it comes to cold calling (-26%).

#### Usefulness
TV advertising was perceived as the most useful (18%) (last year, online advertising was perceived as the most useful and TV ads were rated second). Search advertising was also rated as more useful (3%). Russians had a negative view of the usefulness of other types of advertising in 2020.

> "I don’t like when advertising takes up a lot of my time, unskippable ads (on YouTube, for example) or ads that are not clear."

> "I like short and concise ads that grab you attention from the very beginning. Once I understand that I’m not interested in goods being advertised, I won’t waste my time on the ad."

> "I like that advertising is getting more personalized. I like to see ads for categories of goods that I need."

> "It’s very irritating when what is advertised on social media does not correspond to the real thing (note: quote during a conversation about ads for mobile games on social media."

**Focus group (aged 18–35)**

#### What is your attitude towards various advertising channels?

<table>
<thead>
<tr>
<th>Advertising channel</th>
<th>Tolerance</th>
<th>Perceived usefulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor ads</td>
<td>11%</td>
<td>-8%</td>
</tr>
<tr>
<td>Ads in print media</td>
<td>6%</td>
<td>-11%</td>
</tr>
<tr>
<td>Search ads</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Sponsorship-based ads</td>
<td>2%</td>
<td>-51%</td>
</tr>
<tr>
<td>TV ads Radio</td>
<td>-6%</td>
<td>18%</td>
</tr>
<tr>
<td>Pexnava no Radio</td>
<td>-2%</td>
<td>-29%</td>
</tr>
<tr>
<td>Social media ads</td>
<td>-3%</td>
<td>-18%</td>
</tr>
<tr>
<td>Website ads</td>
<td>-4%</td>
<td>-15%</td>
</tr>
<tr>
<td>Email ads</td>
<td>-6%</td>
<td>-30%</td>
</tr>
<tr>
<td>Mobile ads</td>
<td>-9%</td>
<td>-39%</td>
</tr>
<tr>
<td>Mobile app ads</td>
<td>-12%</td>
<td>-47%</td>
</tr>
<tr>
<td>Audio content ads</td>
<td>-15%</td>
<td>-66%</td>
</tr>
<tr>
<td>Cold calling</td>
<td>-26%</td>
<td>-71%</td>
</tr>
</tbody>
</table>

1. The advertising tolerance index: [the percentage of respondents who favor ads minus the percentage who disapprove of them]
2. Perceived advertising usefulness is assessed based on whether respondents perceive ads as a source of useful information: [the percentage of respondents who found ads useful minus the percentage who did not]
3. Hereinafter search advertising refers to contextual advertising used by search engines
4. Hereinafter website advertising refers to banners ads, native ads and push notifications
Tolerance towards various advertising channels

What is your attitude towards various advertising channels?

Change in the tolerance index, %

Trend
The overall advertising tolerance index has increased slightly (+1 pp) to 3%.

Insights
Men generally have lower tolerance for advertising, especially website, radio and TV advertising; however, they are more tolerant of outdoor ads and ads in print media. Women also demonstrate negative perceptions of the above types of advertising but are more tolerant than men. People living in cities with a population of over one million (other than Moscow and St. Petersburg) are more tolerant to all types of ads (2–3 pp higher than in Moscow and St. Petersburg).

Respondents aged 45–59 were the most tolerant audience; however, they are nonetheless negative towards website ads (-1%). Russians were slightly more tolerant of online advertising (+3 pp to +1%) compared to 2019.¹

² This year, unlike previously, online ads were split into two categories. These methodological changes could have an effect on the tolerance index. Online advertising includes an averaged tolerance index value for the following categories: search ads (+6%) and website ads (-4%).

¹ The advertising tolerance index: [the percentage of respondents who favor ads minus the percentage who disapprove]
Attitudes towards advertising

Perceived usefulness of advertising media

Have you received useful information from adverts?

-7 -13 1 4 -5 12 -3 -12 29 -14 -1

Trend
The overall advertising usefulness index declined by 5 pp in 2020 to -7%.

Insights
TV ads have the highest usefulness rating. Respondents aged over 60 tend to find ads less useful (22 pp below the average). This age group has negative perceptions of almost all types of advertising, with the exception of TV as well as search ads and outdoor ads, favored by selected categories of respondents.

Muscovites and residents of small towns with less than 500,000 inhabitants also consider almost all types of advertising to be of low usefulness (with the exception of TV ads).

Despite the overall negative usefulness rating for outdoor ads, women, respondents aged 30–44 and residents of large cities (from 500,000 to one million inhabitants) generally find outdoor ads useful.

Change in the usefulness index\[1\], %

|                | 2020 | 2019 | 2018 | 2017 | 2016 | Change over five
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TV advertising</td>
<td>+18</td>
<td>+15</td>
<td>+17</td>
<td>+17</td>
<td>+7</td>
<td>+11 pp</td>
</tr>
<tr>
<td>Average usefulness level</td>
<td>-7</td>
<td>-2</td>
<td>+2</td>
<td>-9</td>
<td>-6</td>
<td>-1 pp</td>
</tr>
<tr>
<td>Online advertising[2]</td>
<td>-6</td>
<td>+28</td>
<td>+26</td>
<td>-19</td>
<td>+5</td>
<td>-11 pp</td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>-8</td>
<td>-3</td>
<td>+1</td>
<td>-4</td>
<td>-7</td>
<td>-1 pp</td>
</tr>
<tr>
<td>Ads in print media</td>
<td>-11</td>
<td>-12</td>
<td>-4</td>
<td>-9</td>
<td>-6</td>
<td>-5 pp</td>
</tr>
<tr>
<td>Radio ads</td>
<td>-29</td>
<td>-36</td>
<td>-30</td>
<td>-29</td>
<td>-28</td>
<td>-1 pp</td>
</tr>
</tbody>
</table>

1 Perceived advertising usefulness is assessed based on whether respondents’ perceive ads as a source of useful information: [the percentage of respondents who found ads useful minus the percentage who did not]

2 This year, unlike previously, online ads were split into two categories. These methodological changes could have an effect on the tolerance index. Online advertising includes an averaged tolerance index value for the following categories: search ads (+3%) and website ads (−15%).
Advertising by product category

1. Please specify the category of the product for which you obtained useful information from advertising?

<table>
<thead>
<tr>
<th>Outdoor advertising</th>
<th>Search advertising</th>
<th>Ads In print media</th>
<th>Website ads</th>
<th>TV ads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>20%</td>
<td>23%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Cars</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Beverages</td>
<td>17%</td>
<td>11%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Household appliances</td>
<td>32%</td>
<td>34%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Household chemicals</td>
<td>20%</td>
<td>21%</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>Products and toys for children</td>
<td>10%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Video games, movies and software</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Cosmetics and perfumes</td>
<td>10%</td>
<td>19%</td>
<td>10%</td>
<td>19%</td>
</tr>
<tr>
<td>Drugs</td>
<td>25%</td>
<td>29%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Clothes</td>
<td>14%</td>
<td>28%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Household goods</td>
<td>23%</td>
<td>35%</td>
<td>23%</td>
<td>36%</td>
</tr>
<tr>
<td>Foods</td>
<td>11%</td>
<td>18%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Services</td>
<td>35%</td>
<td>26%</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Electronics</td>
<td>29%</td>
<td>32%</td>
<td>37%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Product categories with the perceived usefulness:

**TV advertising:**
- Services — 56%
- Drugs — 41%
- Clothes — 39%

**Advertising in print media:**
- Electronics — 37%
- Drugs — 29%
- Services — 29%

**Outdoor advertising:**
- Services — 39%
- Household appliances — 32%
- Electronics — 29%

**Search advertising:**
- Household goods — 35%
- Household appliances — 34%
- Electronics — 32%

**Website advertising:**
- Household goods — 36%
- Drugs — 32%
- Electronics — 31%

**Trend**
Although the overall advertising usefulness rating declined to -7%, in 2020, respondents indicated that advertising for health care products and electronic appliances were useful and effective for almost all types of ads. Almost all Russians continue to perceive ads for games, movies and software as the least effective. The share of respondents who find them useful has decreased to 2% in the last two years across all media channels.

“I like perfume ads as they are usually beautiful and high-quality. They are memorable and I always want to try the fragrance.”

“I often go to concerts and exhibitions that I see advertised in the subway.”

“Though ads on Instagram and TikTok are very intrusive, I sometimes actually buy the goods advertised on them.”

“Advertising will be successful if it is corresponds to your needs. For example, I started using a scooter rental service when I saw it advertised on social media.”

Daria Patyutko
Aviasales, Marketing Director

Effective influencer marketing is always the result of hands-on teamwork. Various products have various goals. Therefore, it is rather difficult to say which goals are best served by using influencer marketing. At Aviasales, we buy advertising from influencers to increase brand awareness.”

Daria Patyutko
Aviasales, Marketing Director

“There is definitely a connection between the advertising channel and success of an advertising campaign for certain products; however, it is hard to say whether there is any specific ‘one-size-fits-all’ channel. Therefore, it is important to select channels based on various criteria, such as purpose, price and target audience. For example, there is a number of subtleties to take into account with influencer marketing. Followers are quite loyal to their favorite bloggers and, if the ad placement is done correctly, their loyalty will be transferred onto the product being advertised. The bad news is that it is not that easy or quick to scale ads using influencer marketing.

Daria Patyutko
Aviasales, Marketing Director

“I like perfume ads as they are usually beautiful and high-quality. They are memorable and I always want to try the fragrance.”

“I often go to concerts and exhibitions that I see advertised in the subway.”

“Though ads on Instagram and TikTok are very intrusive, I sometimes actually buy the goods advertised on them.”

“Advertising will be successful if it is corresponds to your needs. For example, I started using a scooter rental service when I saw it advertised on social media.”

Focus group (aged 18-35)
Ad blockers

1. Do you use ad blockers (software that blocks website and app ads)? Which ad blockers do you use?

<table>
<thead>
<tr>
<th>PC/laptop users</th>
<th>Smartphone/tablet users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td></td>
</tr>
<tr>
<td>I have installed an ad blocker, %</td>
<td>I have installed an ad blocker, %</td>
</tr>
<tr>
<td>I use my browser's ad blocking function, %</td>
<td>I use my browser's ad blocking function, %</td>
</tr>
<tr>
<td>I plan to start blocking ads, %</td>
<td>I plan to start blocking ads, %</td>
</tr>
<tr>
<td>I neither block nor plan to block ads, %</td>
<td>I neither block nor plan to block ads, %</td>
</tr>
<tr>
<td>I am not aware of ad blocking technology, %</td>
<td>I am not aware of ad blocking technology, %</td>
</tr>
</tbody>
</table>

Trend
Almost half of PC and laptop users (44%) have installed an ad blocker, of which 26% use AdBlocker and 18% use their browser's ad-blocking function. 24% of respondents do not intend to start blocking ads and another 18% of Russians are not aware of ad blocking technology. Smartphone users tend to block ads less often than PC and laptop users.

Insights
The overwhelming majority of men use ad blockers. Women are a third less likely to use ad blocking software on their PCs and smartphones than men. Young people aged 20–29 are more likely to use ad blockers (almost half of respondents in this age group have installed ad blockers on their PCs and 35% on smartphones). Respondents aged 30–34 are largely unaware of availability of ad blocking.

“The sheer amount of clutter is reducing the impact of adverts. We are seeing a consistent trend towards the use of ad blockers. Our Digital Society Index survey shows that the popularity of these services is continuing to rise year-on-year.

The desire to reduce the amount of exposure to advertising means that we need for more native (in content) and personalized (target-focused) communication channels that are adapted for users and their current needs. One of the most important factors is audience attention management. This parameter can increase engagement and tolerance for advertising. For example, according to our research, the main factor determining whether people watch TV ads until the end is the type of content the ad is attached to. TV ads played during movies and TV series attract more attention.”

Alexander Zakharov
dentsu Russia, COO
Media consumption in figures
Russian media consumption in figures

Size of target audience

100% 88% 56% 38%

Usage frequency of media channels

5.5 days per week 6.3 days per week 4.2 days per week 0.9 days per week

Time spent on media channels

Weekday Weekend Weekday Weekend

Television 3 hrs 51 mins 4 hrs 22 mins
Radio 3 hrs 33 mins 4 hrs 04 mins
Internet 2 hrs 36 mins 3 hrs 41 mins
Social media 1 hr 46 mins 2 hrs 36 mins
Online videos 1 hr 42 mins 1 hr 33 mins
Print media 0 hrs 39 mins 0 hrs 46 mins

Have you changed the Internet service package you purchase from providers? 1

- Yes, I have expanded the list of services
- No, but I plan to expand the list of services
- No, I have no intention to change anything

Change in media consumption due to COVID-19

(in the three months prior to the survey) 2

<table>
<thead>
<tr>
<th>Media Consumption</th>
<th>Weekday Saturday</th>
<th>Percentage Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>3 hrs 51 mins</td>
<td>4 hrs 22 mins</td>
</tr>
<tr>
<td>Radio</td>
<td>3 hrs 33 mins</td>
<td>4 hrs 04 mins</td>
</tr>
<tr>
<td>Internet</td>
<td>2 hrs 36 mins</td>
<td>3 hrs 41 mins</td>
</tr>
<tr>
<td>Social media</td>
<td>1 hr 46 mins</td>
<td>2 hrs 36 mins</td>
</tr>
<tr>
<td>Online videos</td>
<td>1 hr 42 mins</td>
<td>1 hr 33 mins</td>
</tr>
<tr>
<td>Print media</td>
<td>0 hrs 39 mins</td>
<td>0 hrs 46 mins</td>
</tr>
<tr>
<td>E-books</td>
<td>38%</td>
<td>49%</td>
</tr>
<tr>
<td>Printed books</td>
<td>34%</td>
<td>50%</td>
</tr>
<tr>
<td>Video games</td>
<td>40%</td>
<td>49%</td>
</tr>
</tbody>
</table>

1 We asked only respondents who reported an increase in the frequency of their Internet, social media and online video usage.
2 The survey was conducted in June 2020
3 The media consumption change index was calculated as follows: the percentage of respondents who indicated more time spent on media channels minus the percentage indicating less time spent.
Contacts

Olga Tabakova
Partner
CIS TMT Industry Leader
Deloitte CIS

Anton Shulga
Partner
CIS Telecom Leader
Deloitte CIS

Ekaterina Lukianova
TMT Industry
Development Coordinator
Deloitte CIS
elukianova@deloitte.ru

Ekaterina Trofimova
Partner Risk Advisory
Deputy CEO for Deloitte Insights
Financial Services Industry Leader
ektrofimova@deloitte.ru

Mikhail Sokolov
Junior Deloitte CIS
Research Centre Specialist
msokolov@deloitte.ru