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Media Consumption in Russia – 2021

Deloitte CIS Research Center

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Foreword

Olga Tabakova
Partner
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We are proud to present the results of our seventh annual comprehensive study of media consumption in Russia. We analyzed content consumption in core media channels and singled out key trends.

Every year, the impact of the internet on our lives increases, and advances in digital technology have transformed all areas of human activity. Thus, **89%** of respondents use the internet to fulfill their job duties, while **80%** use it to book medical appointments or receive medical assistance; COVID-19 containment measures gave additional impetus to internet usage. In order to deliver more detailed insights, we closely examined three aspects of internet usage: search engines, social media, and online media content consumption, which enabled us to compare data in these categories with 2020 levels.

In 2021 **90%** of respondents reported using social media, which exceeds the share of TV watchers in Russia by **1 pp.** Overall, the most common purpose for internet usage is communicating on social media. Due to the popularity of social media and the availability of mobile internet, smartphones are the device of choice for most web users. In 2021, **53%** used mobile internet versus a mere **31%** in 2017.

Although social media was once primarily used for communicating, users now also see it as a source of reliable information.

One in four Russians tends to put more trust in media outlets that are represented on social networks. This trend is more prominent among younger users. However, official news websites remain key sources of news, similarly to last year.

For our survey, we analyzed trends in consumption of paid online content in Russia. We found that **51%** of respondents use paid subscriptions, most of which comprise paid streaming services. The most significant reason for subscribing to an online service is the availability of unique content, while the most frequent reason for cancelling a subscription is a better offer elsewhere.

Last year, the tolerance of Russian respondents to advertising increased by **2 pp.** They tended to be more receptive to advertising that does not invade their private space and is the least obtrusive. Advertising that invades private space evokes the most negative reactions from respondents and is perceived as the least useful. The survey showed that the two social groups most tolerant to advertising are young people and women. In 2021, respondents perceived search ads as the most useful type of advertising.

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 at: cisresearchteam@deloitte.ru.

Research methodology

Purpose

To study Russian media consumption trends in 2021.

Target group

Russian internet users aged 14 and over (“Russians”), as the survey was conducted online.

Limitations of research

Given the current level of internet penetration among Russians[1], our sample Is biased towards internet users.

Goals

- Take a detailed look at Russians’ media behavior and its gradual transformation.
- Analyze the media channels used to obtain information, topic preferences and time spent consuming media services.
- Look into how Russians’ media consumption has changed over the last five years (2017–2021).
- Assess Russians’ level of trust in various information sources; compare levels of trust in local and foreign media.
- Analyze what types of devices are used to browse media content.
- Assess Russians’ tolerance for advertising, including views on the usefulness of various advertising channels.
- Study specific features of paid online content consumption in Russia.

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 July 2021.
  Research sample:
  A multistage and stratified sample of the Russian population broken down by gender, age and town size comprising 1,600 people from eight Federal Districts.
- Focus groups polled online (via Zoom). Two focus groups (of seven people each) were conducted in July 2021.
- Expert-level interviews with industry leaders.

Legend

Men
Women
$$$ High income
$$ Medium income
$ Low income
Cities (over 1 million people)
Cities (500,000–1 million people)
Cities (less than 500,000 people)
Secondary education or less
Higher education, university graduate

Abbreviations

Central Federal District (TsFO)
Northwestern Federal District (SZFO)
Southern Federal District (YuFO)
North Caucasian Federal District (SKFO)
Volga Federal District (PFO)
Ural Federal District (UrFO)
Siberian Federal District (SFO)
Far Eastern Federal District (DFO)

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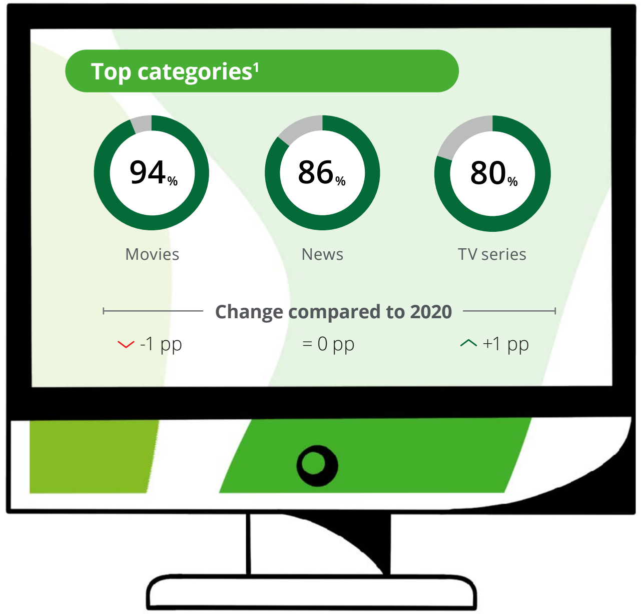
[1] According to Russian Public Opinion Research Center (VCIOM), Internet penetration among Russians over the age of 18 was 84% in August 2021.

Key findings

89% of respondents have watched TV over the last two weeks.

+1 pp vs. 2020



Top categories¹

94%	86%	80%
Movies	News	TV series

Change compared to 2020

-1 pp = 0 pp +1 pp

Women and young people are more tolerant to advertising

TV watching (daily average)

On weekdays:

145 **minutes**

On weekends:

207 **minutes**

Trends in TV watching on weekdays and weekends

46/48% keeps the TV on in the background.

24/25% turns on the TV to watch a particular program.

TV watching remains the main means of consuming media...

On weekdays:

for a quarter of respondents **(24%)** from 18:00 to 00:00;

On weekends:

for **28%** of those polled who watch it in the morning (from 9:00 to 12:00) and **25%** of those who watch it in the evening (from 21:00 to 00:00).

Devices used to watch TV, change² on 2019

TV set	81%	-16 pp
Smartphone	80%	+10 pp
Laptop	71%	+7 pp
Desktop PC	69%	+4 pp

"Last year there was growing synergy between TV and online content, which complements and enriches the user experience. TV viewers readily watch movies and shows on TV, which confirms the attractiveness of larger screens as a key tool that has significant emotional impact on people. Streaming services attract audiences through limited issue series and genre variety, thereby shaping habits for payed content. Today, paid subscriptions are the core monetization model of OTT services.

Currently, the viewership of TV and other professional video content is increasing simultaneously.

Large screens provide a special experience from the standpoint of engagement, also serving as an opportunity to spend time with family and friends. Meanwhile, the increase in smartphone usage results from the ubiquity of these devices, which never leave the hands of their owners. This cross-platform, simultaneous usage is a distinct feature of video consumption today. According to GlobalWebIndex, 86% of consumers use at least one other device when watching TV. This trend has an impact on the advertising market, as we are seeing a strong interest in cross channel projects among advertisers.»

Karolina Sokolova,
EVEREST CEO

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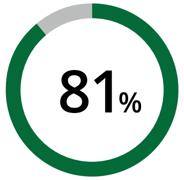
[1] The share of respondents who watched the specified program.

[2] Among respondents watching TV.

Key findings



consumed media content online in the last two weeks

The internet is the most popular media channel in Russia; it is ubiquitous in everyday life.

Internet usage time (daily average)

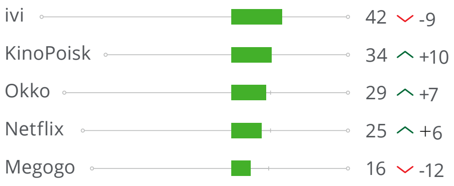
On weekdays:

223 **minutes**

On weekends:

253 **minutes**

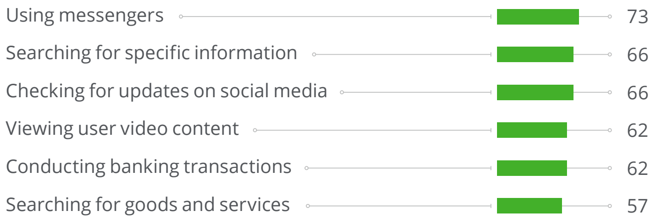
Top five most popular streaming services in 2021 vs. 2019



56%

of Russian viewers are ready to substitute cinemas and theaters for viewing similar content online.

Top purposes of internet usage, %[1]



Popularity of smartphones and tablets in 2021 vs. 2020

own a smartphone 96% ⌃ +1 pp

own a tablet 65% ⌃ +5 pp

The share of respondents using smartphones to access the internet

2021	2020	2019	2018	2017
95%	92%	88%	86%	82%

Most popular devices for connecting to the internet

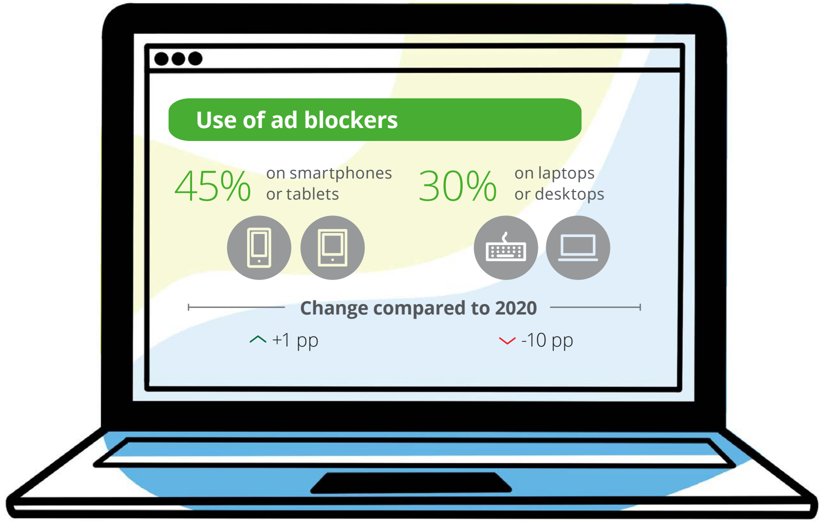
Smartphone	62%	5%
Desktop PC	34%	21%
Laptop	32%	20%
TV set	18%	32%
Tablet	10%	42%
Smart devices	5%	71%

🟩 Regularly/ continuously used by respondents

▨ Not used

Smartphones — are the most popular device for internet access **(95%). 62%** of Russians use their smartphones regularly to access the internet.

Desktop PCs and laptops are used by **79%** and **80%** of Russians respectively to access the internet.



Use of ad blockers

45% on smartphones or tablets

30% on laptops or desktops

Change compared to 2020

⌃ +1 pp

⌄ -10 pp

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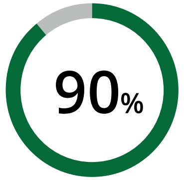
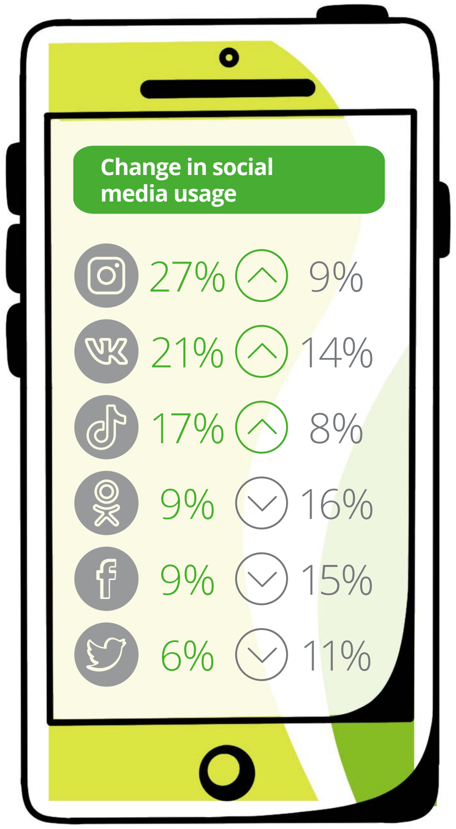
[1] The share of respondents who use internet regularly or often for the above-mentioned purposes

Key findings



used social media
in the last two weeks



🟩 Use more often ▨ Use less often

Communication in social media and messengers continues to replace face-to-face interaction, driven especially by pandemic constraints

Top five installed messengers, change vs. 2020, %

WhatsApp	86	⌄ -2
Telegram	61	⌃ +11
Viber	57	⌄ -5
Skype	57	⌃ +5
VK messenger	49	–

Social media usage is a core activity…

On weekdays:

For **20%** of Russians from 9:00 to 21:00. In the morning and evening, social media is the preferred way to consume media for over **14%** of respondents.

On weekends:

Social network usage is a core media activity for **16–21%** of respondents from 9:00 until the end of the day (00:00), i.e. 15 hours a day.

Thus, social media usage is not associated with certain days of the week and/or types of activity (work/rest).

95%

of Russians have experience using social media.

Time spent on video games (daily average)

On weekdays:

98 minutes

On weekends:

147 minutes

Online media consumption consists of both professional content (including TV) and user-created video materials.

In order to view video content, Russians use various devices, giving preference to TV sets, smartphones and laptop.

Sources of user/amateur videos, %

Youtube	83
VK	46
Instagram	38
TikTok	30
Odnoklassniki	25

Popular devices for playing video games

Smartphone 85%

Desktop PC 72%

Laptop 64%

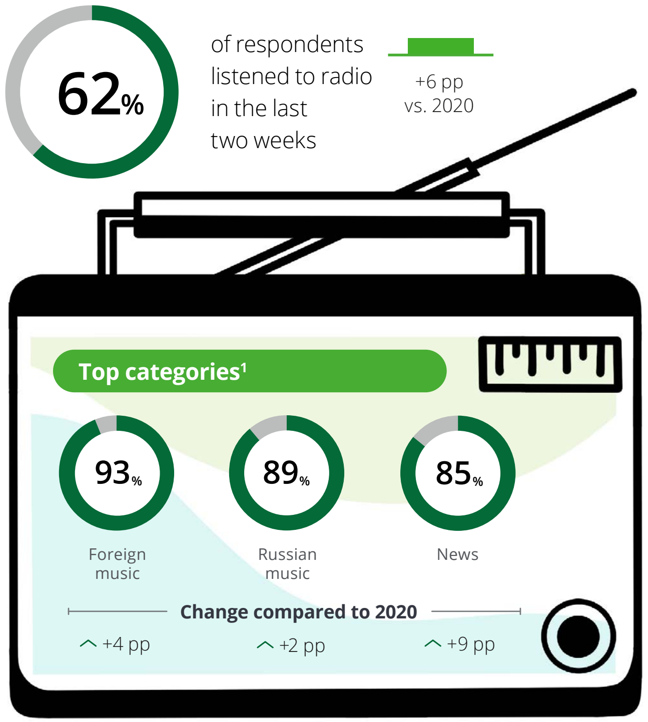
Tablet 49%

Game console 47%

Portable game console 23%

VR-device 17%

Key findings



Devices used to listen to the radio

	Car stereo	Radio at home	Desktop/laptop	Mobile phone	Portable radio
🟩 On weekends	38%	29%	17%	9%	7%
▨ On weekdays	55%	19%	14%	7%	7%

Time spent on radio listening (daily average)

On weekdays:

60 **minutes**

On weekends:

84 **minutes**

Share of various services, %²

Online streaming services 77%

Audio services 48%

Multiservices 65%

Trends in radio listening on weekdays and weekends

49/36% listen to the radio at home

25/49% listen to the radio while driving

15/6% listen to the radio at work

In 2021, users showed less interest in podcasts

Popular podcast categories³

News	64	-9
Movies, music, art	62	-16
Popular science	60	-8
Politics and society	58	-8
Topical podcasts (professional topics)	56	-8

Usage of paid subscriptions

51% of respondents previously used paid subscriptions, while only **30%** had an active subscription at the time of the survey.

Key reasons for buying a paid subscription according to Russian respondents:

- unique content **(72%);**
- no ads **(60%);**
- bonuses/discounts in other services **(26%).**

Young respondents tend to pay for content usage more often, by **14 pp** on average.

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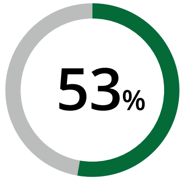
[1] The share of radio listeners who selected a specific program

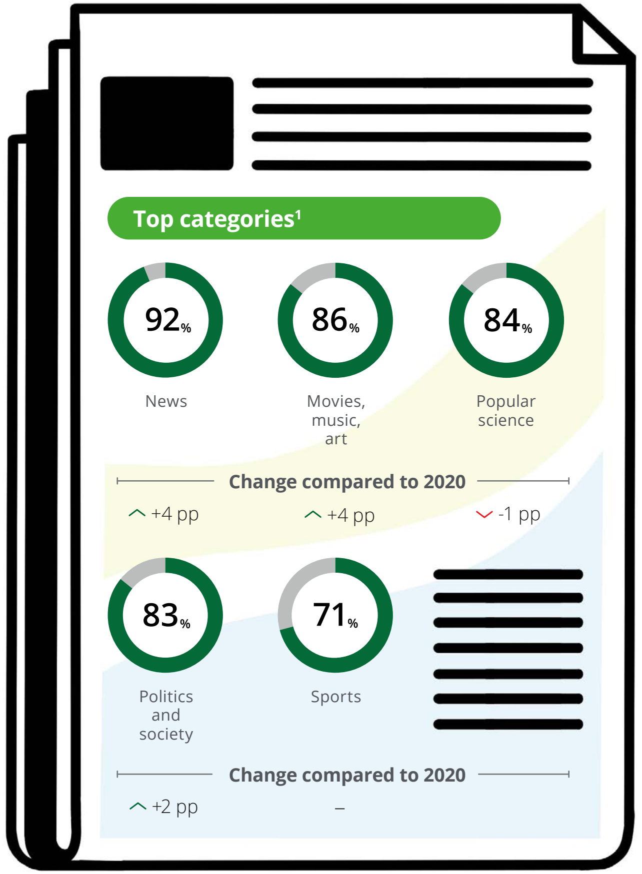
[2] The percentage of respondents subscribed to paid service at the time of the survey

[3] The percentage of respondents listening to podcasts on a specific topic

Key findings



of respondents had read print and/ or digital media in the last two weeks



Time spent on reading mass media (daily average)

On weekdays: 38 **minutes**

On weekends: 46 **minutes**

Trends in print media usage in 2021 (%) and change vs. 2020, %

I buy print media	33	-2
I read free print media	29	+1
I read what friends/relatives buy	17	+2
I have subscription for some print media	11	+1
I buy print media to fill in time based on the situation	10	-1

Popularity of media, %

	Read constantly	Read often	Read sometimes
Online mass media	18	27	28
Social networks posts	15	22	30
Print newspapers	6	10	25
Print magazines	4	8	27

Attitudes towards Russian and foreign media

- The majority of Russians **(53%)** prefer Russian media. However, in the last five years this group has shrunk by **5 pp** (vs. **58%** in 2017).
- The percentage of respondents reporting more trust in foreign media increased by **4 pp** in the last five year vs. **10%** in 2021.

Top three news sources in Russia in 2021

- The majority of Russians receive news from official internet sources.
- This applies only to Russians aged 34 and above. Social media is the most popular news source for young people (**65%** of respondents aged 14–24).
- Only **5%** named print newspapers and/ or magazines as the core media category they use.

internet (official websites)
62% -10 pp vs. 2020

Television
52% -6 pp vs. 2020

Internet (social media and blogs)
49% +9 pp vs. 2020

Trends in online media usage in 2021

58 % I read news without a subscription from select sources.

31 % I have a subscription for some online media outlets.

6 % I do not visit the websites of online media outlets, but I read news shared by others.

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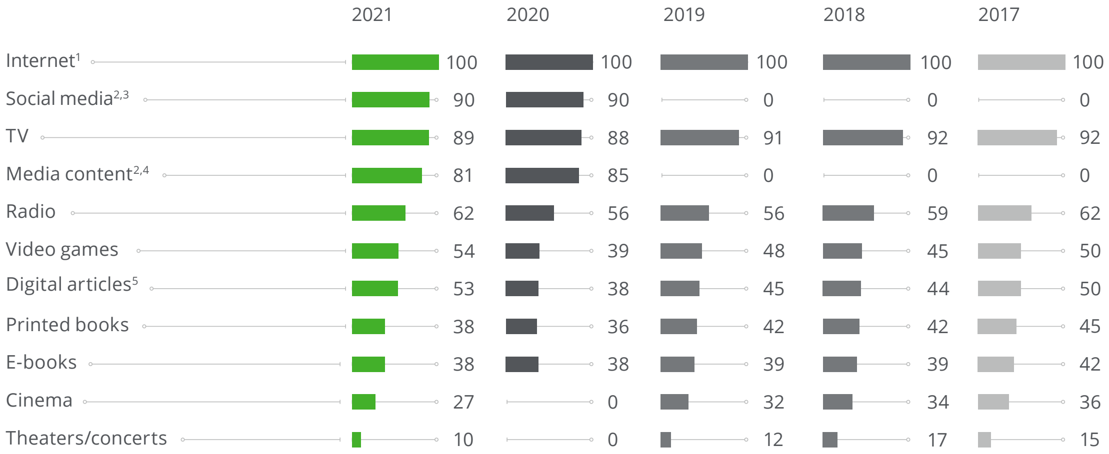
[1] Percentage of respondents who read this news category in print and/or digital media

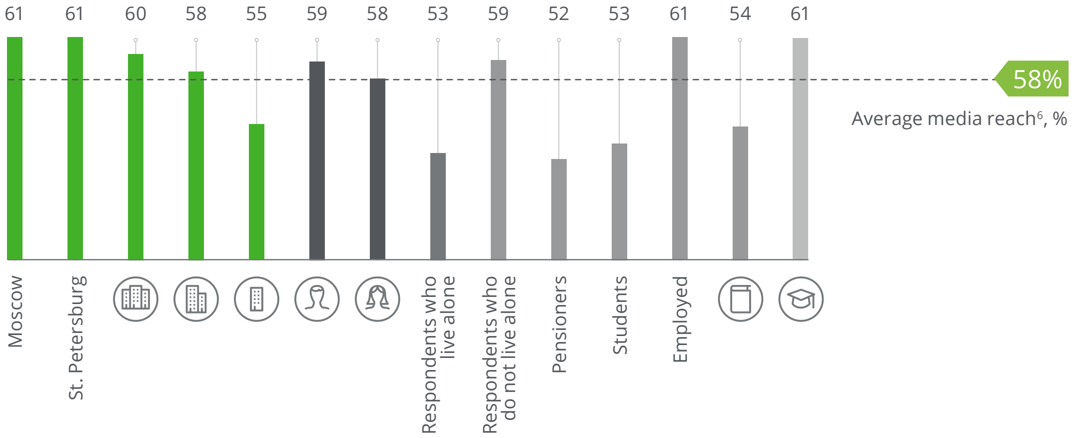
Media consumption metrics in Russia

Media consumption by category

Audience reach, %

Which of the following media channels have you used in the last two weeks?





Trends

- Last year, media consumption increased by **2 pp,** reaching **58%.**
  - In the covered period, the percentage of respondents that used the internet to access media content and spend free time increased by **4 pp.**
  - The popularity of video games increased, with respondents playing them **15 pp** more often vs. the previous year.
  - After restrictions on visiting public spaces in 2020 were lifted, a significant number of Russians returned to cinemas and theaters. That said, visits to cinemas and theatres/concerts in 2021 were still lower than in 2019 by **5 pp** and **2 pp r**espectively.

Insights

- In 2021 media consumption levels in Moscow and St. Petersburg exceeded the national average by **3 pp,** reaching **61%.**
- Respondents with higher education consume media content more often **(by 7 pp)** than respondents without higher education, or **3 pp** above the national average.
- **57%** of Moscow residents play video games (**3 pp** above the national average). **52%** of St. Petersburg residents use their free time to read print books, while 49% read e-books, which is **14 pp** and **11 pp** above the average respectively.

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[1] Based on the applied data collection method (online survey)

[2] A breakdown of internet usage has been provided since 2020.

[3] Use of Instagram, VK and other social media.

[4] Watching movies, TV series and video content and listening to audio.

[5] Since 2021, the survey has focused both on print media and digital media (prior to 2021 only print media was studied), which may have impacted audience growth.

[6] The average audience for twelve analyzed media channels.

Social media

Insights

Social media is used uniformly all over the country, with deviations of **+/-2 pp** from the average. The share of social media users is 6 pp higher among women compared to men (**92%** vs. **86%**). The largest number of users are aged 14–44. The lowest social media usage was among Russians aged 60 and above (**8 pp** below average). Homemakers and women on maternity leave use social media more than others, (by **6 pp**) on average.

Changes in media consumption

Social media usage slightly decreased compared to last year (by **1 pp**). A significant decrease can be observed in St. Petersburg (**-10 pp** vs. last year). Social media usage is up among unemployed respondents, reaching 91% (**+5 pp** vs. 2020). Social media usage is down **4 pp** among students and **4 pp** and **3 pp** among business owners and employees of commercial organizations, respectively, compared to the average.

TV

Insights

TV watching in Moscow exceeds the national average by **2 pp.** In contrast, it is **6 pp** below average in St. Petersburg.

TV viewing levels across the federal districts are close to the average level. The lowest rates of TV viewing were reported in the Southern Federal District (YuFO), at **85%**, while the highest TV viewing levels were observed in the Far Eastern Federal District **(93%).**

The least engaged TV viewers are teenagers aged 14–19, with only **76%** of them watching TV (**13 pp** below the average). The older the respondent, the higher the TV viewing rate is (at **94%** for those aged 55–59).

Respondents who live alone watch TV at relatively low rates **(78%),** similarly to students **(78%).**

Changes in media consumption

Last year, TV viewing rates increased in Moscow by **5 pp,** as opposed to St. Petersburg **(-4 pp).** TV viewing in the Ural and Far Eastern Federal Districts increased by **6 pp** each. The share of TV viewers among respondents aged 20–24 was up **6 pp,** growing 3 pp in cities with a population of less than 0.5 mln people.

Video content

Insights

Overall, in Moscow, online video content viewing is **2 pp** higher than the national average, reaching **83%.** In St. Petersburg and cities with a population of less than 0.5 mln, it is **4 pp** below the average.

In the federal districts, this indicator is very close to the national average **(81%),** except for the Far Eastern and Northwestern Federal Districts (**-5 pp** and **-4 pp** respectively)

The most avid online video viewers are respondents aged 30–39 **(88%),** with the group aged 14–19 slightly behind it (**1 pp** less, at **87%**).

Changes in media consumption

Last year, online video viewing fell by **5 pp** vs. 2020. This trend can also observed in St Petersburg **(12 pp),** cities with a population of less than 0.5 mln **(-8 pp),** and all federal disctricts except the North Caucasian Federal District, where it remained stable at **83%.**

The decrease in the share of online media content consumers in 2021 may be attributed to the high base effect of 2020, when COVID-19-related restrictions triggered an uptick. However, this share remains high **(81%).**

Radio

Insights

Radio listening in Moscow is **6 pp** above the national average, unlike in St. Petersburg (where it is **5 pp** below the average). The share of radio listeners in cities with a population of less than 0.5 mln is **57%.** The popularity of radio listening differs significantly depending on the federal district (**+/- 9 pp** vs. the average). The lowest level of radio listening is observed in the Northwestern and North Caucasian Federal Districts (**53%** and **54%** respectively), as opposed to the Ural Federal District, where it is the most popular **(71%).**

Young people aged 14–29 are the least likely to listen to radio (48%). Respondents aged 30–44 and 45–59 are more active radio listeners (**70%** and **68%** respectively).

Radio is much less popular among students, with a mere **30%** of them listening to the radio (which is **-32 pp** below the national average).

Changes in media consumption

Overall, radio listening rose by **6 pp,** reaching **62%** in 2021.

In the same period, the share of radio listeners in Moscow grew by **7 pp,** while in St. Petersburg it fell by **8 pp.** Compared to the previous year, radio listening increased in the Ural **(+18 pp),** Far Eastern **(+17 pp)** and North Caucasian Federal Districts **(+15 pp).**

Video games

Insights

In Moscow, respondents play video games more often than in the rest of the country (by **3 pp**). A relatively high share of people prefer this type of leisure activity in cities with a population of 0.5–1 mln **(57%).** In cities with population of less than 0.5 mln, the popularity of video games is **4 pp** below the national average.

The popularity range spanned from **+4 pp** in the Northwestern Federal District and **+3 pp** in the Far Eastern Federal District to **-8 pp** in the North Caucasian Federal District. Men are more likely to play video games (by **18 pp**) than women (**64%** vs. **46%**); their passion for video games exceeds the national average by **10 pp.**

Higher-income individuals tend to play video games more frequently **(65%).**

Changes in media consumption

In the covered period, video gaming increased by **15 pp,** reaching **54%.** However, the share of players decreased significantly in 2020. The 2021 level exceeds the 2019 benchmark by a mere **6 pp.**

The popularity of video games increased most of all in Moscow **(+19 pp)** and the Far Eastern **(+21 pp)** and Siberian **(+19 pp)** Federal Districts.

The popularity of video gaming grew among men **(+20 pp),** employed respondents **(+19 pp)** and medium-income individuals (to a comparable extent).

Digital articles

Insights

The reach of digital media increased year-on-year, as print media went online. Digital articles are the most popular in St. Petersburg **(60%),** where the number of readers exceeds the national average by **7 pp.** A similar trend can be observed in the federal districts (**-3/+2 pp** vs. the average), except for the Far Eastern Federal District (**43%,** or **11 pp** below the average). Respondents aged 14–29 read digital articles **6 pp** less than the national average, while the popularity of this category in the 30–59 age group exceeds the average by **3 pp.**

Respondents with a higher education read digital media **6 pp** more often on average. The share of those who read articles online among higher income individuals is **65%.** Among low-income respondents, only **44%** read digital media.

Changes in media consumption

High-income individuals show a stable, high level of interest in reading articles online (**12 pp** above the average for 2020/2021). Business owners tend to read online more frequently (**6 pp** above the national average in 2020 and **8 pp** in 2021), similarly to respondents with higher education (by **4 pp** vs. the average in 2020 and **6 pp** vs. 2021).

Book

Insights

The share of Russians who read e-books is now equal to the share of those who read print books **(38%).**

The popularity of book reading in Moscow (both electronic and print books) is higher than the Russian average (by **3 pp/4 pp** respectively), while in St. Petersburg it exceeds the average by **11 pp/13 pp**. Meanwhile, in cities with a population of less than 0.5 mln, the share of book readers is **9 pp/4 pp** below the average.

The North Caucasian Federal District is the leader by number of book readers **(+6 pp/+8 pp).** The lowest levels of book reader were recorded in the Far Eastern Federal District (**-7 pp/-11 pp** below the national average). Women tend to read books more than men **(+1 pp/+4 pp),** with respondents aged 30– 44 being the most avid readers **(+4 pp/+1 pp).**

Changes in media consumption

In the reporting period, e-book reading remained at previous levels, while the popularity of print books increased **(+3 pp).** Residents of St. Petersburg are reading less e-books and more print books this year **(-10 pp /+ 6 pp).** The share of book readers increased in the Siberian Federal District **(+4 pp/+5 pp)** and fell in the Far Eastern Federal District **(-8 pp/-2 pp).** The trends in this category are mixed among respondents aged 14–19 **(-7 pp/+9 pp).** Book reading is the most popular among respondents aged 60–64 (**+5 pp/+9 pp** vs. 2020).

Cinemas and theaters

Insights

The share of cinema- and theater-goers is higher in St. Petersburg than the Russian average (by **8 pp/6 pp** for cinemas/theaters and concerts respectively). Attendance in cities with a population of less than 0.5 mln is **12 pp/3 pp** lower than the average.

In the federal districts, figures are close to the average level. Respondents are least likely go to cinemas in the North Caucasian Federal District (at **7 pp** below average) and the Far Eastern Federal District (at **6 pp** below average). The lowest attendance levels theater were in the Volga Federal District (**4 pp** below the average).

Most often, cinema- and theater-goers are represented by respondents aged 14–44 **(+5 pp/+ 2 pp).** After the age of 45, interest in this pastime decreases to below-average levels. Respondents with higher education attend cinemas and artistic events more often **(+2 pp/+2 pp).** Cinemas are most popular among students (**8 pp** above the average level).

Media usage throughout the day

Which of the following media channels have you used in the last two weeks?

	Internet	Social media	Television	Media content	Radio	Video games	Print and digital media	Print books	E-books	Cinema	None of the above
On weekdays											
From 6:00 to 9:00	10%	14%	19%	3%	13%	1%	1%	1%	2%	0%	36%
From 9:00 to 12:00	24%	19%	15%	6%	12%	2%	1%	1%	3%	0%	17%
From 12:00 to 18:00	28%	21%	10%	9%	9%	3%	2%	1%	3%	1%	13%
From 18:00 to 21:00	18%	19%	24%	17%	4%	5%	3%	3%	3%	1%	3%
From 21:00 to 0:00	13%	17%	24%	18%	3%	7%	4%	3%	3%	1%	7%
From 0:00 to 6:00	6%	6%	7%	6%	2%	3%	3%	2%	2%	1%	62%
On weekends											
From 6:00 to 9:00	8%	10%	15%	3%	6%	1%	1%	1%	1%	0%	54%
From 9:00 to 12:00	17%	17%	28%	7%	9%	2%	1%	1%	3%	0%	15%
From 12:00 to 18:00	22%	21%	17%	14%	7%	4%	2%	2%	2%	1%	8%
From 18:00 to 21:00	18%	17%	23%	19%	4%	6%	2%	2%	2%	2%	5%
From 21:00 to 0:00	9%	16%	25%	18%	3%	7%	5%	3%	4%	2%	8%
From 0:00 to 6:00	5%	6%	7%	7%	3%	4%	2%	2%	2%	1%	61%

🟩 Highest level of activity for the media channel

🟨 Medium level of activity for the media channel

⬜ Lowest level of activity for the media channel

Insights

Media consumption on weekdays and weekends still differs significantly in terms of timing and audience size.

On weekdays:

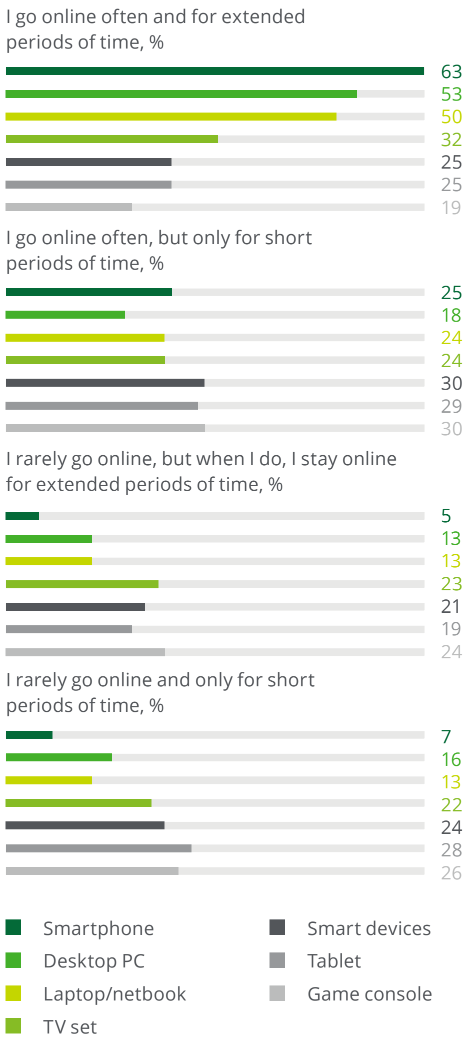
- Internet: searches never fall below **10%** (henceforth, excluding night hours); peak usage **(28%)** occurs between 12:00 and 18:00.
- Television: TV viewing never drops below **10%;** peak usage **(24%)** occurs between 18:00 and midnight.
- Social media: the lowest level of social media usage is **14%;** the most frequent usage **(21%)** occurs between 12:00 and 18:00, and slightly lower activity **(19%)** can be observed between 09:00–12:00 and 18:00–21:00.
- Radio: peak listening occurs during the first half of the day (06:00–12:00), with an audience reach of **12–13%.**

On weekends:

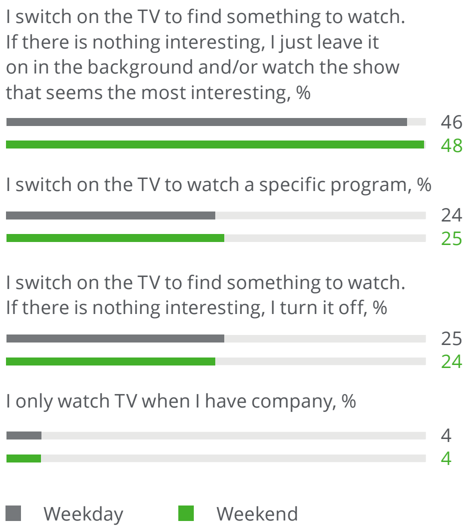
- Media consumption starts later on weekends than weekdays.
- TV viewing is the most popular from 9:00 to 12:00 (at **28%**) and 21:00 to midnight (at **25%**). This media channel is often turned on in the background when consumers are at home.
- Social media and internet searches are core activities in the most active periods — mornings and evenings. Usage peaks at 12:00–18:00. In this interval, social media and internet searches are used by **21%** and **22%** of our respondents respectively

Media consumption practices

Internet



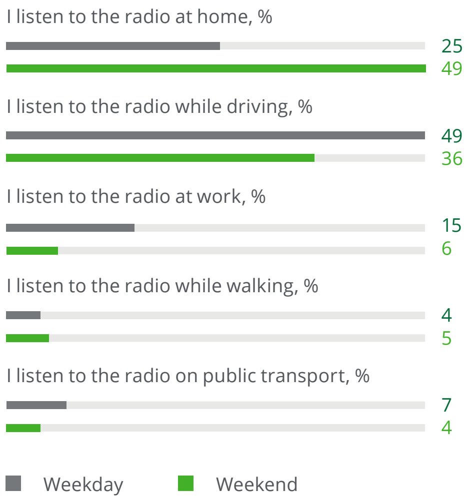
TV



Insights

- Desktop PCs and laptops/netbooks are leaders in terms of the number of people using them to connect to the internet.
- Overall, TV-watching and radio-listening habits have not changed.
- **31%** of those who read articles online pay for a subscription; **58%** of respondents read articles through various outlets without a subscription.

Radio



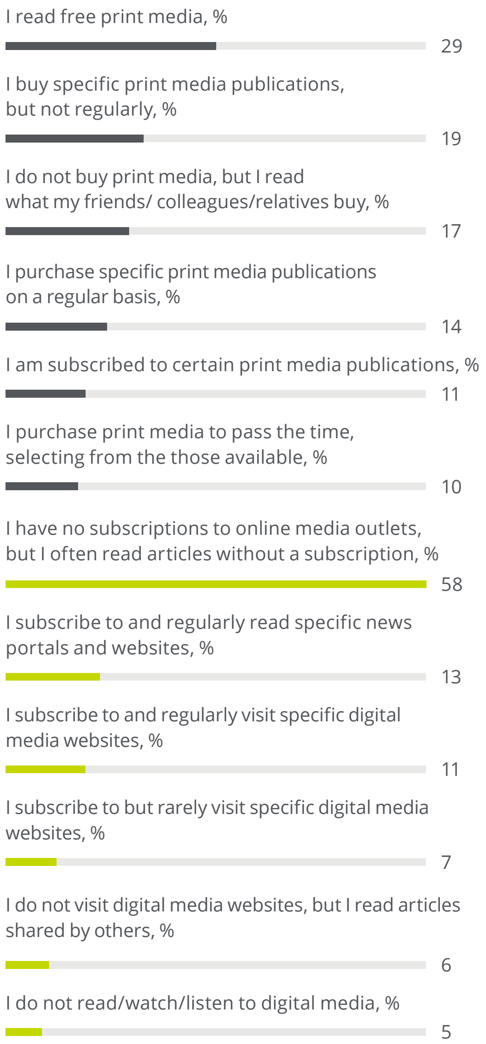
"When the pandemic started, I tended to consume more media content. However, I began to get fed up and got more picky about the programs and categories I consume."

"Because of the information overload stemming from so many different—often contradictory—sources, you have to think critically and filter out low-quality content."

"I have been reading the news media online for a long time, but I continue to buy print newspapers for my grandfather."

Focus group

News media



Changes in media consumption in 2017–2021

Media usage index[1]

Trends

- In 2021, media consumption decreased in each category, in contrast to the explosive growth that characterized 2020: this year the average media consumption index fell to 2017 levels. However, after adjusting for the sharp decrease in cinema/theater/concert attendance in 2021, (which was due to lockdown restriction that led to the index plunging), the average index rose to **11%,** i.e. above 2019 levels.
- Russians who reported an uptick in media consumption (for the top five media outlets) were most likely to be respondents aged 14–29, the unemployed, and permanent remote employees.

Insights

- In 2021 **46%** of women used internet search engines, which is **14 pp** higher than men. In addition, search engine usage grew by **8 pp** among unemployed respondents compared to the employed.
- **42%** of respondents from the North Caucasian and Ural Federal Districts consume media more frequently than the average level (by **8 pp**).
- **36%** of respondents from the North Caucasian Federal District watch TV more frequently than other Russians, by an average of **8 pp. 36%** of higher-income respondents stated that they watch TV more frequently now, which is **8 pp** higher than the average level and **10 pp** higher than medium-income and lower-income respondents.
- **24%** of St. Petersburg residents show more interest in social media than other respondents (by **7 pp**), ranking second after Muscovites. Last year, **46%** of the residents of the North Caucasian Federal District spent more time on social media, which was **13 pp** above the average.

How have your media consumption patterns changed in the last six months? (%)

	2021	2020	2019	2018	2017
🟩 Internet search	+34	+39	+62	+59	+66
🟩 Media content consumption	+23	+24	-	-	-
🟩 Social media	+21	+31	-	-	-
🟩 Television	+12	+28	-4	-7	-11
🟩 Average index	+5	+19	+9	+7	+5
🟩 Video games	+4	+11	+7	+4	+6
🟩 Radio	+4	+10	+2	0	-3
🟩 Print books and online news media[2]	+3	-	-	-	-
🟩 E-books	+1	+6	-9	-12	-18
⬜ Print books	-5	+6	-9	-12	-18
⬜ Theaters/concerts	-20	-	+2	+6	-2
⬜ Cinema	-21	-	+4	+4	+3

Higher usage, %

Lower usage, %

---

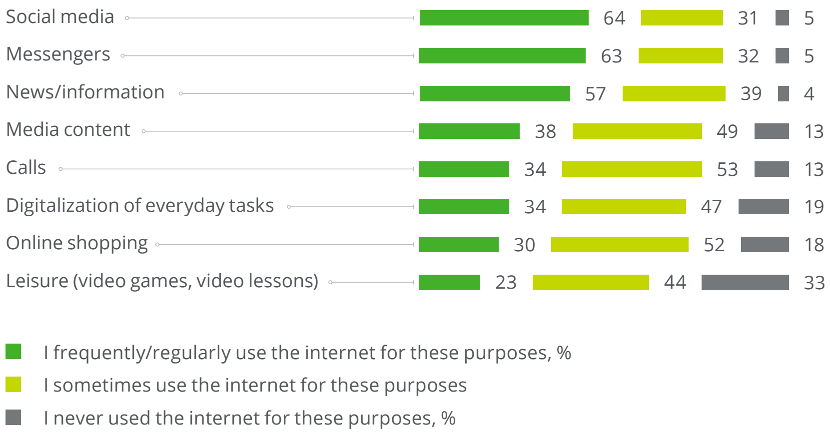
[1] The media usage index is calculated as follows: [the percentage of respondents indicating increased usage] minus [the percentage of respondents indicating decreased usage].

[2] Starting from 2021, this question was asked with respect to both print and digital media (previously, it was only asked about print media). No comparison with prior periods was performed.

Internet usage in Russia

For what purposes do you use the internet? How often?

The most frequently cited purposes for using the internet[1]



Insights

- Social media, messengers, and reading the news are key reasons for using the internet.
- Messengers are frequently used in cities with a population of over one million **(76%),** cities with a population of 0.5–1 mln **(70%)** and cities with a population of less than 0.5 mln **(69%). 81%** of women regularly use messengers vs. **63%** of men.
- Respondents from the Northwestern Federal District use internet search engines more frequently than residents in other regions (by **73%**), which exceeds the Moscow level by **7 pp (66%)**. Meanwhile, the share of low-income respondents using internet search engines is **4 pp** lower than their medium- or high-income peers **(67%).**
- **68%** of respondents without a higher education report frequently consuming media content, which is **10 pp** higher than their peers with higher education.
- Residents of cities with a population of less than 0.5 mln are more likely to use the internet for banking transactions **(65%).**
- In cities with a population of 0.5–1 mln, the share of such respondents is **3 pp** less than the national average.
- In 2021, **63%** of women reported frequently using the internet to read reviews about goods/services, which is **13 pp** higher than men (at **50%**). **59%** of respondents with higher education regularly read such information on the web, which is **6 pp** higher than people without higher education **(53%).**

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[1] The chart contains aggregated data; more detail on the internet usage regularity and breakdown by purpose is available on page 45 of the Appendix (1/2).

Popularity of internet resources

❓ *Have there been any changes to how often you use the following internet resources?*

	I use it more often now		I use it less often now	I haven't used it at all
YouTube	35%	︿	8%	5%
Instagram	27%	︿	9%	25%
VK	21%	︿	14%	14%
Telegram	21%	︿	10%	38%
TikTok	17%	︿	8%	51%
Odnoklassniki	9%	﹀	16%	35%
Facebook	9%	﹀	15%	36%
Pinterest	8%	︿	7%	68%
Twitter	6%	﹀	11%	60%
LinkedIn	3%	﹀	5%	78%

Trends

- In 2021, Russian respondents preferred to use YouTube, Instagram and Telegram (the growth in popularity of these three resources was at least **10 pp** higher than other sites). Respondents showed less interest in Odnoklasniki, Facebook, Twitter and LinkedIn.

> *"I use Instagram instead of TV, even though there is a lot of unnecessary and uninteresting content.»*
>
> *"I've stopped watching TV completely. Sometimes if I want to watch a specific program, I look for it on YouTube. A lot of the time these aren't even complete episodes, but just compilations of the most interesting parts of the show.»*
>
> *«I only use Facebook for work purposes. I feel more comfortable with other social networks for my personal needs. It's probably a matter of habit, but I have a hard time navigating FB and finding the tabs and sections I need.»*
>
> **Focus group**

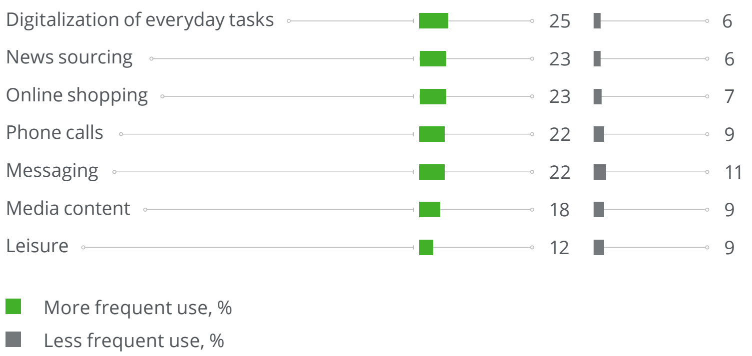
Insights

- **27%** of respondents from the Northwestern Federal District and **26%** of respondents from the North Caucasian Federal District claim to have been using VK more frequently, which is **6 pp** and **5 pp m**ore than the average, respectively.
- **38%** of Muscovites stated that they have been using YouTube more frequently, which is **9 pp** above St. Petersburg residents **(29%). 37%** of women showed more interest in Youtube, overtaking men by **5 pp.**
- Muscovites used Instagram more frequently than St. Petersburg residents (by **5 pp**). **28%** of respondents from cities with a population of over 0.5 mln preferred Instagram, which is **6 pp** higher than for respondents in cities with a population of less than 0.5 mln. **35%** of respondents from the Southern Federal District and **41%** of respondents from the Northwestern Federal District reported using Instagram more frequently, by **8 pp** and **14 pp** respectively.
- **26%** of respondents from the Northwestern Federal District said that they'd been using TikTok more often (**+9 pp** vs. the national average). **20%** of women reported spending more time on TikTok, which is **7 pp** more than men.
- **4%** of Russians without higher education reported visiting LinkedIn more often; meanwhile the share of respondents with higher education active on LinkedIn was **2 pp** lower.
- **25%** of women reported more frequent Telegram usage, which was **8 pp l**ess than men.

Popularity of various smartphone features

*Which smartphone features have you been using more/less often?**

Change in how often certain smartphone features are used[1]



"The number of screens I use simultaneously has increased significantly. I switch on the TV to watch a movie, hold a smartphone in my hand, and keep a laptop by my side. I use them all for different purposes."

Focus group

Trends

- In 2021, smartphones were used more frequently to obtain information. Over **28%** of respondents reported using smartphones more frequently to earn money.
- Online shopping gained popularity, with over **30%** of respondents preferring to make online purchases using their smartphones.
- Over **27%** of respondents reported more frequent mobile banking using their smartphones.

Insights

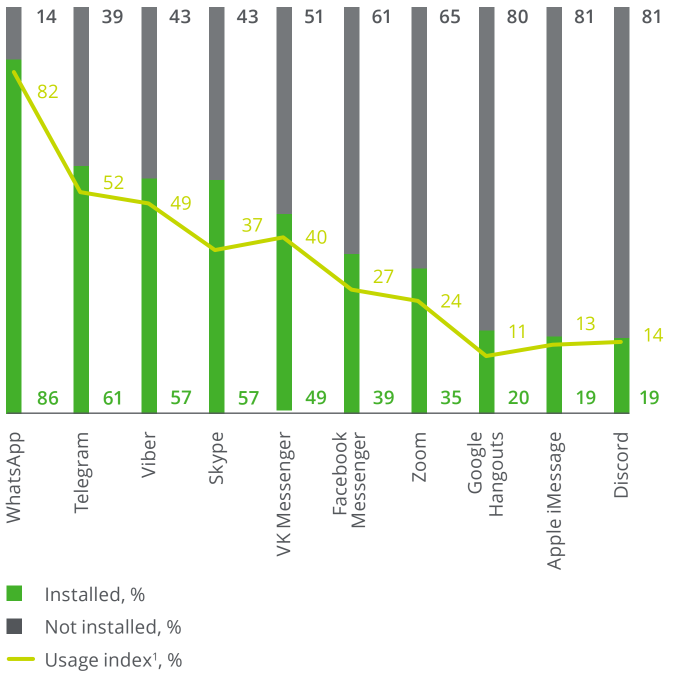
- Respondents aged 14–19 claimed to have been using their smartphones more often to download and listen to music **(39%).**
- Respondents aged 45–59 reported more frequent use of smartphones to make phone calls **(71%) .**
- Online shopping became more popular among women: in 2021, **37%** of women used smartphones to make such purchases. **12%** of female respondents said that they'd begun using their smartphones more often to keep track of their physical activity, compared to **9%** of men.
- **29%** claimed to have started using smartphones more frequently to view video content on Youtube . Users most likely to cite an increase in this activity included Muscovites **(32%),** women **(32%),** and respondents aged 14–29 **(39%).** Respondents in cities with a population of over 0.5 mln cited more frequent use of smartphones for web content consumption (compared to the Russian average).

---

[1] The chart shows data aggregated in the respective groups. More detailed information on the popularity of smartphone features is available on page 46 of Appendix (2/2).

Messengers

Which instant messengers do you have installed on your smartphone? Which ones do you actually use?



Trends

- The four messenger apps preferred by Russians have not changed since last year. However, their popularity and usage frequency have changed somewhat.
- WhatsApp use decreased by **2 pp.** Although WhatsApp remains the most widely used messenger, it lagged behind Telegram in terms of growth. The latter is actively used for communication and overtook Viber.
- This year, **61%** of respondents claimed to have installed Telegram, which is an **11 pp** increase on 2020.
- Skype's popularity increased by **5 pp** vs. 2020. However, the largest discrepancy between installations and usage (at 20%) is observed for Skype (**57%** of respondents had installed Skype but only **37%** use it).

Insights

- In the Northwestern Federal District, only **77%** of respondents have installed WhatsApp, which is **9 pp** below the national average. The VK messenger app also remains more popular in the Northwestern Federal District than in other districts, with its usage index amounting to **49%.**
- Telegram is the most popular messenger in the North Caucasian Federal District, where **72%** of respondents have installed it and **66%** of respondents use it. Among various age groups, Telegram is most popular among respondents aged 14–29 **(72%).**
- Viber's usage index fell by **6 pp** compared to 2020. **49%** of low-income respondents do not use Viber. Viber is most popular among homemakers and women on maternity leave **(64%);** Viber's usage index is **55%.**

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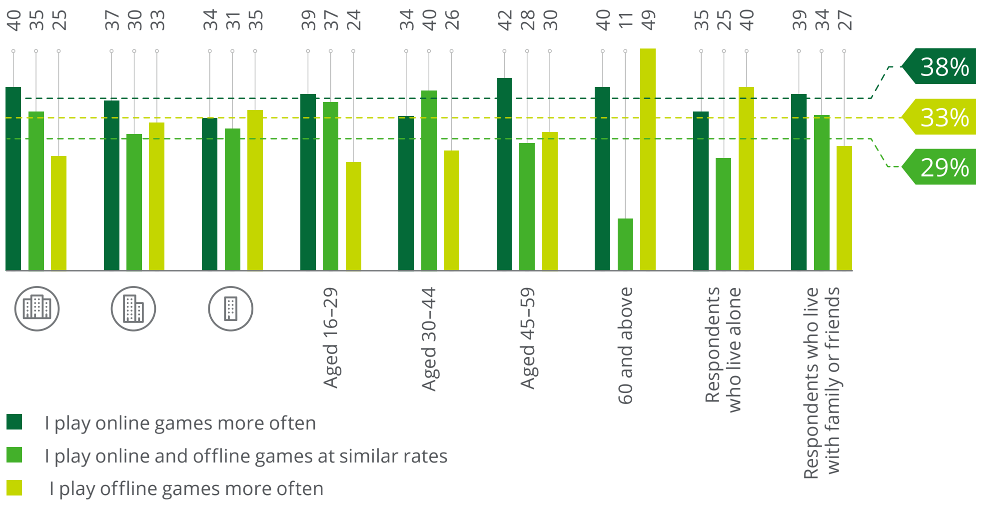
[1] Usage index: the share of those who installed the messenger and uses it minus the share of those who installed the messenger but does not use it.

Video games

What kinds of games do you play most often?



54% of Russians play video games.

Trends

- Most respondents said that they play online games **(38%). 45%** of respondents from the Southern and North Caucasian Federal Districts reported playing online games, which is **7 pp** above the national average.
- Respondents were least likely to play offline games **(29%).** Offline games are **7 pp** less popular among Muscovites than the national average. **37%** of respondents from the Northwestern Federal District reported playing offline video games more frequently, which is **8 pp** above the national average.

Insights

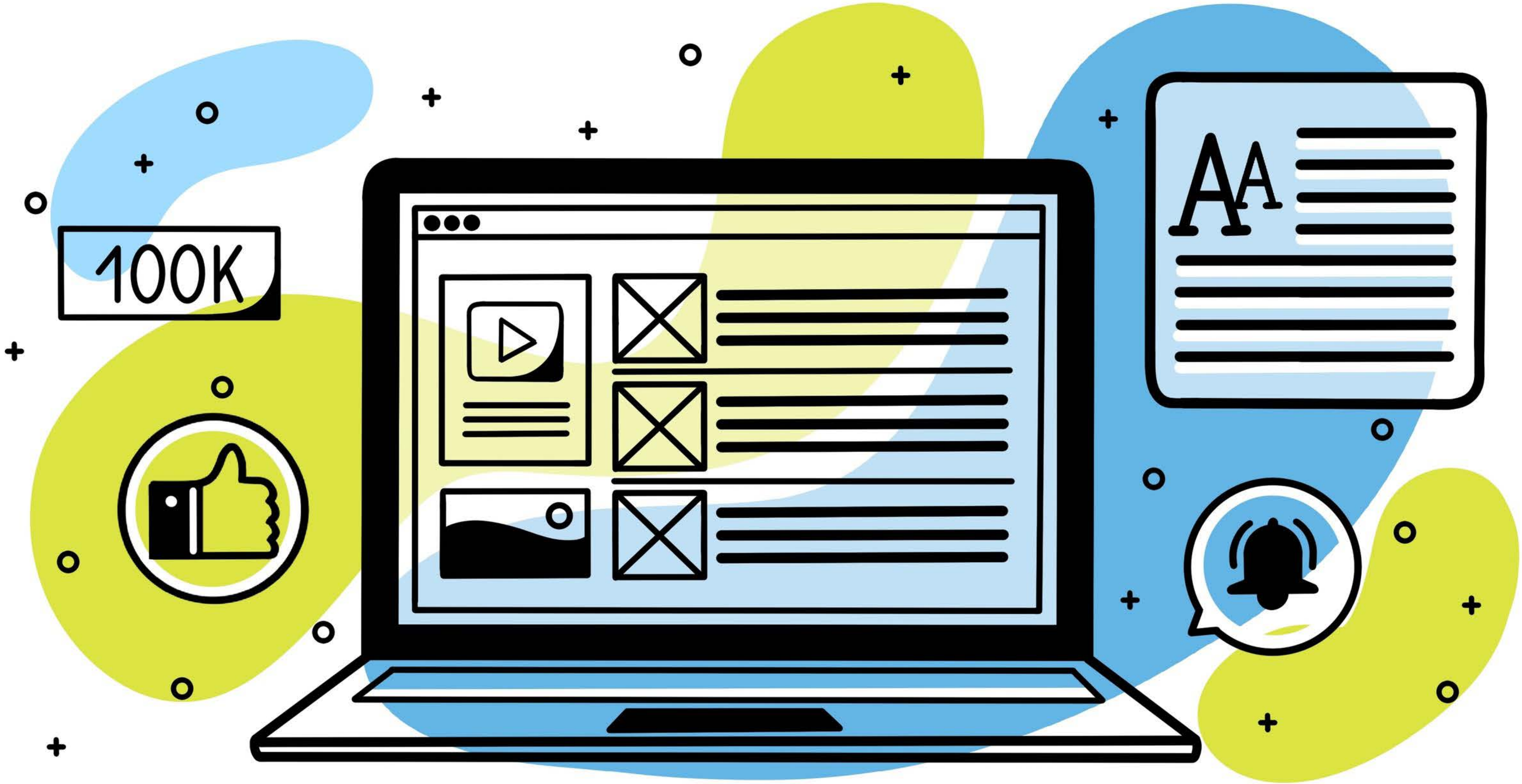
- **59%** of respondents aged 14–29 claimed to play video games, with **39%** of them playing mostly online games. The average duration of a gaming session is 1 hour and 46 minutes on workdays and three hours on weekends.
- The share of gamers aged 30–44 is **61%,** with **40%** splitting time equally between online and offline games. Their average gaming session lasts 1 hour 44 minutes on workdays and 2.5 hours on weekends.
- The share of players aged 45–59 is **52%,** with **42%** playing mostly online games. Their average gaming session lasts 1 hour 26 minutes on workdays and 2 hours 5 minutes on weekends.
- Smartphones are the most popular device for playing video games among users aged 14–59.
- The share of gamers among respondents aged 60 and over is **35%,** with **49%** playing mostly offline games. This group mostly uses desktop PCs for gaming **(88%).** The average duration of a gaming session is 1.5 hours on workdays and 1 hour 50 minutes on weekends.

"The penetration of video games among Russian internet users is already very high. Casual games based on mobile platforms lead by audience size, with 'three-in-a-row,' puzzles and quizzes being the most popular. Mobile games have a lot of fans and are even popular among older generations. Desktop games are mostly popular among men and are relatively complex. These include shooters, races and simulators.

Given the high popularity of video games, the growth potential of this industry depends on monetization. Both the average check size and the number of users ready to pay for this type of entertainment has increased lately, as people are buying more games and more game content. On average, the percentage of mobile and desktop gamers is 2–3% and 10–12% respectively. At present, the desktop segment remains the largest on the game market due to higher average checks. However, mobile games may soon take a leading position through monetization."

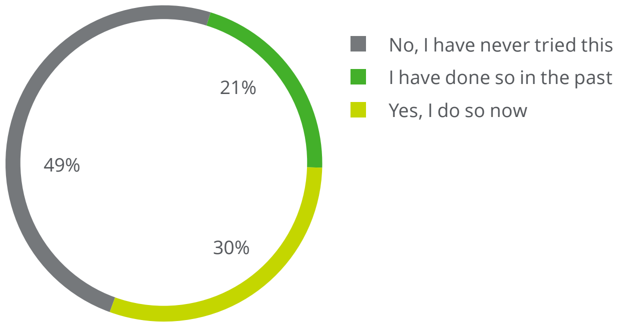
Yana Morozova, Media Buying Director, Mail.ru Group

Subscriptions for paid media content



Paid content usage

Do you use paid subscriptions for services or online content?



Why do you choose to pay for subscriptions?

"During the pandemic, streaming services attracted large audience through free trial periods, but they cannot substitute real-life cinema."

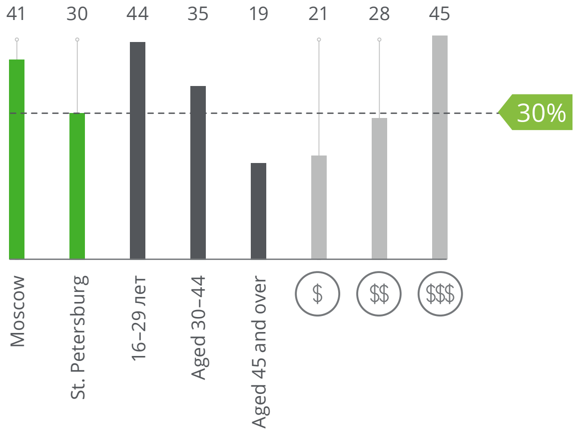
"I tried to watch a concert online. It cannot be compared to the emotions and feelings you experience at a real concert."

Focus group

The popularity of subscriptions for certain services among those currently subscribed

Streaming services	Audio services	Multiservices
77%	48%	65%

Respondents who have a subscription

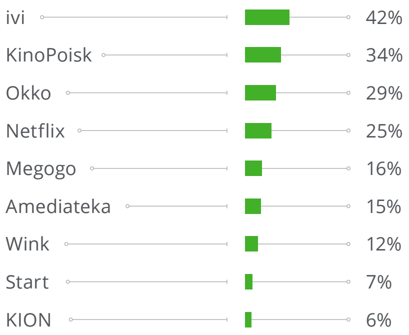


Insights

- **51%** of respondents have paid for subscriptions at some point; **30%** were paying for a subscription at the time of the survey.
- Among Federal Districts, the Central Federal District has the largest share of respondents with active paid subscriptions **(36%)** (**41%** of Muscovites have one). The Ural Federal District is in second place by popularity of subscriptions **(34%).**
- Compared to other Russian regions, the share of paid subscriptions is higher in cities with a population of over one million **(33%).** In contrast, paid subscriptions are less popular in cities with a population of less than 0.5 mln **(26%).**
- Respondents living alone tended to use paid subscription less often (**3 pp** below the national average). Only **27%** reported having a paid subscription.
- **71%** of Muscovites used paid subscriptions to avoid advertising; this reason is **11 pp** above the average, which is **60%** of all respondents. Conversely, avoiding ads was less crucial for residents of St. Petersburg (**12 pp** below the average), accounting for **48%** of respondents.
- **65%** of men pay for a subscription in order to avoid advertising, while the share of women with this motivation is only **56%.**
- Bonuses and discounts in other services matter more for women **(28%).**

Subscriptions for video content

What resources do you use to view professionally created video content?



Are you prepared to stop going to cinemas and theaters and only view similar content online?

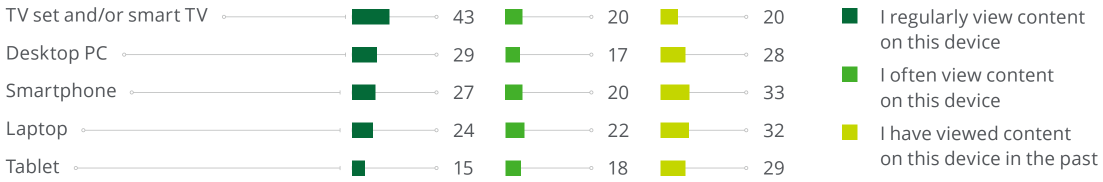
Prepared to give it up

56 % The largest share of such respondents were Muscovites **(60%),** residents of the Southern Federal District **(61%),** men **(60%),** and respondents aged 14–29.

Not prepared to give it up

44 % The largest share of such respondents were St. Petersburg residents **(49%),** women **(47%),** students **(49%),** and respondents aged 30–44 **(48%).**

What devices do you use to view content from streaming services?



"After a year of using streaming services, I feel somewhat uncomfortable in real-life cinemas. People make noise, stand up, and spoil the atmosphere. Watching movies at home is much more enjoyable."

Focus group

"During the pandemic, watching movies on streaming services became a habit. Even now, when various events and venues are open, I keep my subscriptions because I like this format. My content consumption has increased significantly because of subscriptions».

Focus group

Insights

- Respondents aged 30–44 buy subscriptions for streaming services more actively than other age groups. Among them, **63%** use ivi**, 54%** use Kinopoisk, and **48%** use Okko. Respondents aged 14–29 and 45–59 have less subscriptions, but the leading services are the same.
- Subscriptions for ivi are less popular in Moscow **(38%)** compared to the national average. Kinopoisk has a similar share of subscribers in Moscow **(38%).** Netflix is **5 pp** more popular in Moscow than the Russian average **(30%).**
- The share of ivi users in St. Petersburg is **23%,** which is **19 pp** below the average. Residents of St. Petersburg tend to use Kinopoisk more often **(29%),** with Okko ranking second **(26%).**
- The popularity of ivi is the highest in cities with a population of 0.5–1 mln **(45%).**
- On average, women are more likely to subscribe to streaming services than men: **44%** vs. **39%** for ivi; **37%** vs. **30%** for Kinopoisk; and **32%** vs. **26%** for Okko (the same trend can be observed for most of the services studied). The only exception is Amediateka, where the share of male users is **2 pp** higher (**16%** vs. **14%**).
- **83%** of respondents view streamed content on TV sets and smart TVs. **43%** of respondents reported regularly using such devices. Other devices are popular too, including smartphones **(80%)** laptops **(78%),** personal computers **(75%),** and tablets **(62%),** In other words, despite some difference, users are willing to view paid content using various devices.

Subscriptions for audio content

*What online services do you use to listen to audio content and radio?**

How often do you listen to music online?[1]

48% of respondents who have paid subscriptions subscribe to music services.

Insights

- The Southern Federal District has the highest share of music service subscribers **(58%),** followed by the Ural and Far Eastern Federal Districts (**55%** each). Paid music subscriptions are used in Moscow by **50%** of respondents, compared to **35%** in St. Petersburg (**13 pp** below the Russian average).
- **52%** of respondents in cities with a population of over one million subscribed to music services. The share of such subscribers in cities with a population of 0.5–1 mln was **46%**. In smaller cities, this share drops to **35%.**
- Young respondents aged 14–29 are the most active users of paid music services **(59%).** Meanwhile, only **46%** of respondents aged 30–44 reported subscribing to music platforms.
- Yandex.Music is used by **59%** of respondents who reported having a subscription. In cities with a population of over 1 mln, the share of such subscribers is **4 pp** higher **(63%),** while in cities with a population of less than 0.5 mln it is significantly lower **(40%).** In smaller cities, people are more likely to pay for Spotify, with this service being the most popular in such cities **(46%).**
- In Moscow, Apple Music is **3 pp** more popular than the Russian average **(17%).**
- Respondents aged 14–29 tend to use Yandex.Music less often **(49%)** than the national average. In contrast, Boom and Spotify are more popular than among other age groups (the share of each service equals **41%**).
- Respondents aged 30–44 use paid musical content differently: Yandex.Music ranks first by popularity **(62%),** followed by YouTube Music **(39%).** Boom and Spotify are used by **30%** and **34%** of respondents in this age group respectively.
- **65%** of men listen to Yandex.Music, while women use the service less often **(54%)**. YouTube Music is the second most popular service among men (at **36%**), while Spotify ranks second among women **(35%).**

"The Russian music streaming market has high growth potential. According to the IFPI 2020 report, Russia is the 16th largest music streaming market globally; it grew by +39% vs. 2019 to USD 167 mln. Considering the size of the Russian internet audience (100 mln users), as well as the opportunities unlocked by streaming services, this growth is highly likely to continue in the coming years. Therefore, our goal is to contribute to growth in the Russian music market and develop it to become a key partner for Russian performers and an industry leader.»

Ilya Alekseev
Spotify Russia CEO

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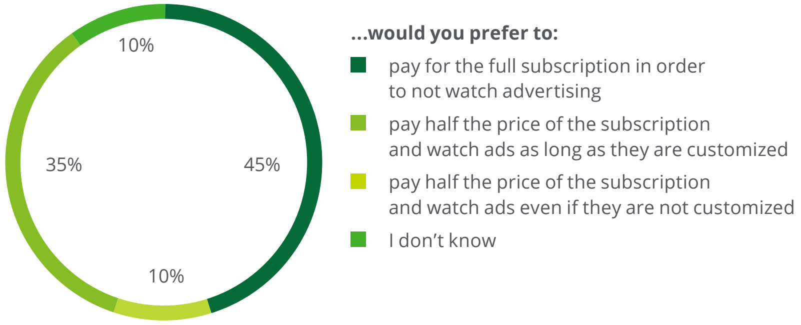
[1] This question was put only to the respondents who confirmed that they had paid subscription for music services at the moment.

Reasons for cancelling paid subscriptions

*Why would you cancel a paid subscription?**

If a video service offered a subscription for half the price, as long as you agreed to watch advertising similarly to regular TV1[1]...



"In my opinion, Russians are not really used to paid subscriptions. Many users do not want to pay for content if they can find it on the internet for free.»

«Everybody tries to minimize expenses. Television was always free, which shapes the habit of not paying for video content.»

Focus group

Insights

- **53%** of respondents who use paid subscriptions said that they are prepared to cancel their subscription if they receive a better offer elsewhere.
  - In cities with a population of less than one million, the share of people who gave this response was lower **(50%),** while in cities with population of over one million, the share was higher **(54%).**
  - On average, this reason is cited more often by young respondents aged 14–29 **(56%).** Respondents aged 30– 44 cite this reason less often **(49%).**
  - Having no need for a subscription is the second most common reason for canceling paid services (**46%** on average in Russia).
- In smaller cities (with a population of less than 0.5 mln) the most common reason for cancellations paid subscription **(53%)** is «I don't need it». However, in cities with population of 0.5–1 million, this reason is significantly less significant **(37%).**
- Lack of unique content ranks third among potential reasons for canceling a subscription **(31%).** This reason is most common in large cities with a population of over one million **(35%).** The share of respondents indicating this reason in smaller cities is **14 pp** lower **(21%).**
- Expiration of the promo period is most frequently cited by low-income respondents as a reason for canceling a subscription **(32%).**

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[1] The question was put only to respondents with active current subscriptions (30%).

Data content and usage patterns

News sources

Top three news sources in Russia in 2021

Internet (official websites)

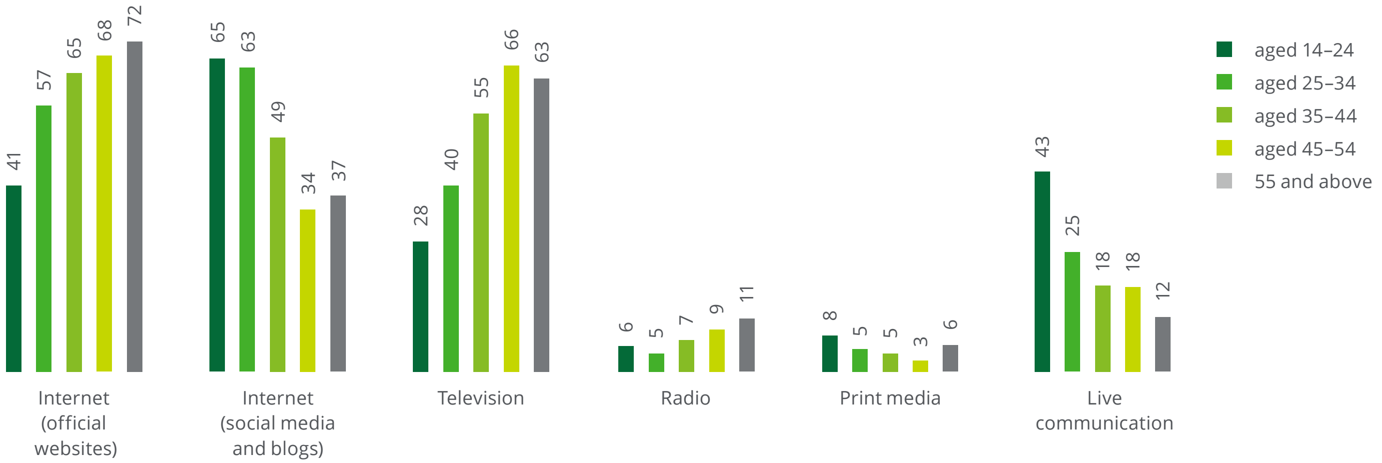
62%

Television

52%

Internet (social media and blogs)

49%



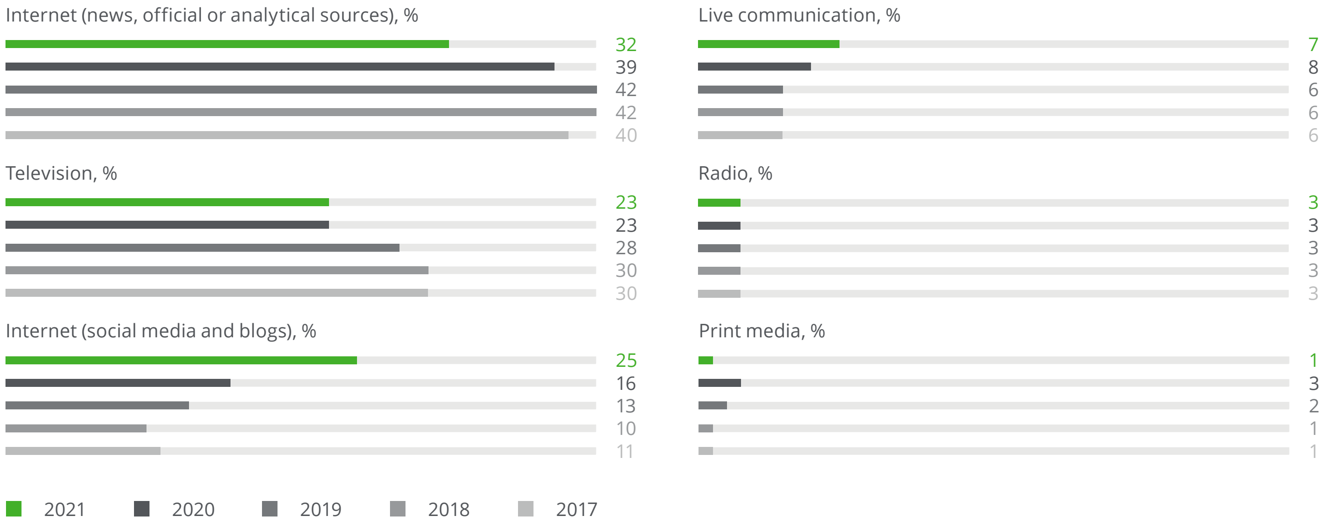
What sources do you go to for the news? (%)

Insights

- Russians aged 14–34 use social media and blogs as a news source more often than others (**64%** on average). Older respondents prefer to get news from agencies and official websites **(68%).**
- Live communication as a means of keeping up with the news is most popular among respondents aged 14–24 **(43%).**
- Younger respondents tend to receive news when communicating (on social media or via live communication).
- Meanwhile, older respondents still prefer to stay abreast of the news through classic sources such as television and/or official online news sources.
- **56%** of respondents from cities with a population of less than 0.5 mln choose television as a key news source, which is **7 pp** above cities with a population of 0.5–1 mln and **5 pp** above cities with a population of over one mln inhabitants.
- Pensioners choose television as a key news source **18 pp** more frequently than respondents from other age groups.
- **51%** of Muscovites prefer online sources (social media, blogs, etc.), which is **12 pp** more than in St. Petersburg. **54%** of women chose social media and blogs as a key source of news, while men are **10 pp** less inclined to make such a choice. In turn, men reported using official news websites **14 pp** more frequently than women (**70%** vs. **56%**).

Ranking of media sources by trust level

When different news sources report on the same event differently, which source are you most likely to believe?



"When a news story is too emotional, that's a major red flag for me. If news items are conveyed in a very emotional manner I don't trust them, regardless of the source."

"Contemporary audiences like to receive compressed information. LiveJournal used to be very popular, but now most blogs have moved to Telegram».

Focus group

Trends

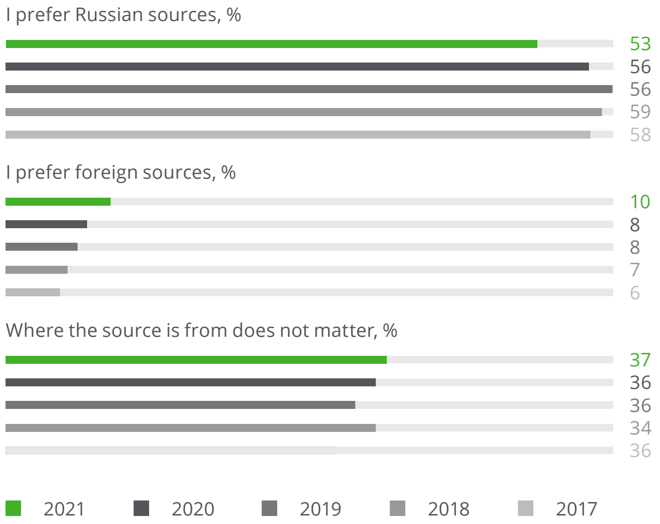
- Trust in traditional sources of information, such as television, the news and official websites, is decreasing. The share of Russians who trust television the most has decreased by **7 pp** in the last four years. Meanwhile, the share of respondents who said that they trust the news and official websites has fallen by **10 pp** since 2019, to **32%** in 2021.
- More and more Russians trust social media and blogs.
- In 2018–2021, the popularity of these news sources more than doubled, reaching **25%.**

Insights

- **32%** of respondents said they prefer official news websites, **25%** trust social media and blogs, while **23%** prefer television. In cities with a population of 0.5–1 mln, social media ranks second by trust level (**26%** of respondents), while in cities with a population of less than 0.5 mln, second place goes to television (**25%** of respondents).
- Respondents aged 14–29 are the only age group that tend to trust social media and blogs above all **(33%).**
- **30%** of respondents aged 60 and above trust television first and foremost, which is **8 pp** higher than other age groups.

Attitudes towards the media: Russian or foreign sources?

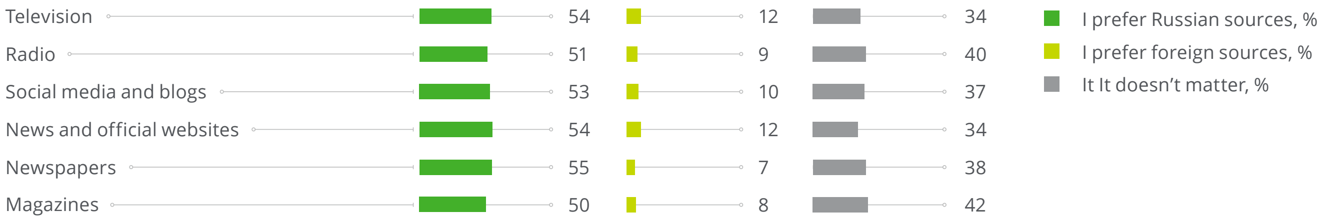
When different news sources report on the same event differently, which source are you most likely to believe?



"The place of origin is not as important as the bias towards a certain country. There are lots of tabloids and propaganda abroad too, so I try to select independent news outlets.»

Focus group

Preferred Russian and foreign news sources in 2021, %



Trends

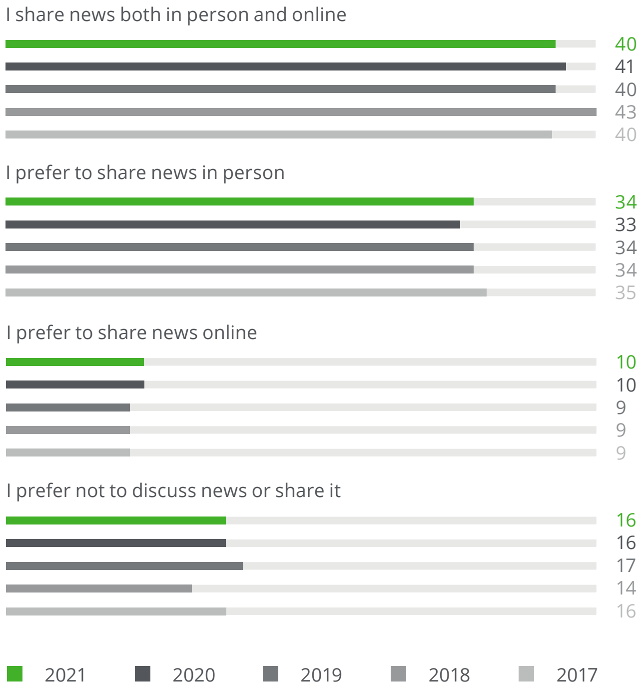
- The majority of respondents **(53%)** prefer Russian sources.
- However, the share of respondents who prefer Russian sources has declined by **5 pp** in the last five years.
- Conversely, trust in foreign media has increased. In the last five years, the share of those who trust in foreign media increased by **4 pp,** reaching **10%** in 2021.
- The share of respondents who don't differentiate between Russian and foreign sources has remained stable over the last five years.

Insights

- **52%** of respondents in St. Petersburg prefer Russian sources to foreign ones, which is **4 pp** higher than Muscovites.
- The smaller the population of a city, the higher the trust in Russian media: **50%** of residents of cities with a population of over one million rely on Russian sources, while respondents from all cities with a population of less than one million are **6 pp** more likely to trust Russian sources.
- **55%** of women trust Russian media, which is **5 pp** more than men. In turn, men are **4 pp** more likely than women to trust foreign media.
- Respondents aged 14–29 tend to trust in foreign media more than others: **14%** of young people prefer foreign news sources, which is **4 pp** above the average.

Sharing news in Russia

How do you prefer to share news?



«Over the last year, my colleagues and I mostly met on Zoom. That is where we communicate and share news; it is very convenient. The only drawback is that it is much more difficult to moderate such meetings."

Focus group

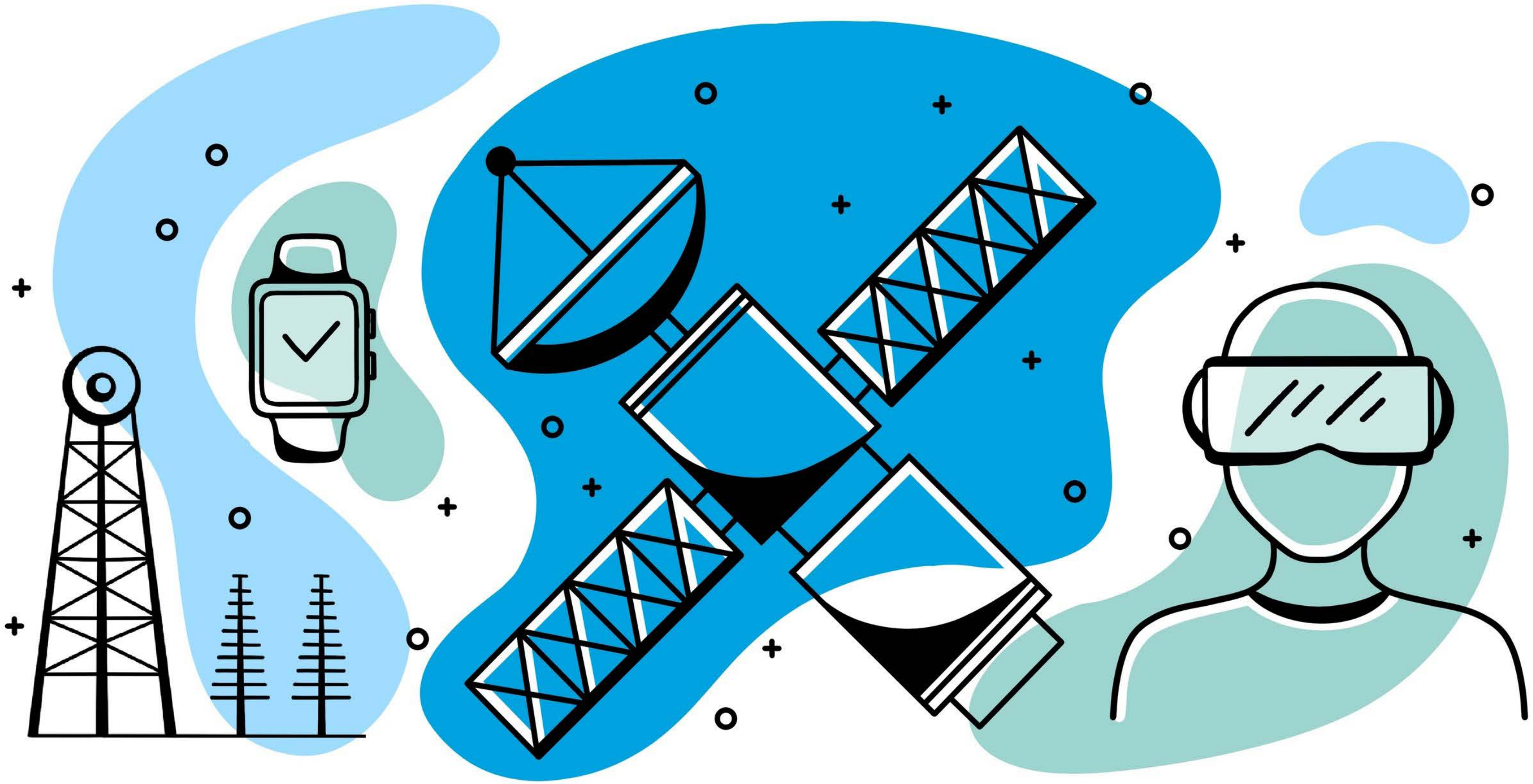
Trends

- **84%** of respondents stated that they tend to share news both in person and online. Only **16%** prefer not to share news.
- News sharing behavior has not changed significantly over the last several years. There has been some fluctuation among respondents who prefer to share news in person. Over the last year, the share of such respondents recovered, reaching **34%.** The percentage of those who prefer to share news online remains the most stable (**10%** in 2021).

Insights

- Residents of the Ural Federal District are **10 pp** less likely to share news than the average level, both in person and online.
- **39%** of St. Petersburg residents prefer to exchange news in person, which is **11 pp** more than in Moscow.
- **28%** of respondents aged 14–29 share news in person, which is **9 pp** less than in other age groups.
- **15%** of respondents from the North Caucasian Federal District and **14%** of those from the Far Eastern Federal District prefer red sharing news online, which is **5 pp** and **4 pp** above the average, respectively.

Technology and media consumption



Attitudes towards new gadgets

Would you describe yourself as a gadget enthusiast?

Gadget enthusiasts

I buy new gadgets as soon as they appear on the market.

I may not be among the first buyers of new gadgets, but I prefer to buy them before they go mainstream.

Users of tested technology

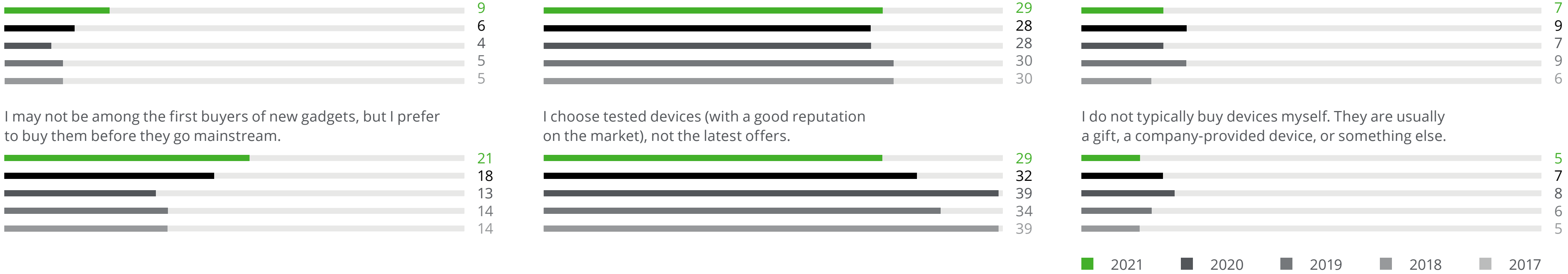
I buy the latest gadgets, but only after comparing them to other new products and identifying the best option.

I choose tested devices (with a good reputation on the market), not the latest offers.

Passive buyers

I will buy a new device only after it goes mainstream and there is no alternative.

I do not typically buy devices myself. They are usually a gift, a company-provided device, or something else.



Trends

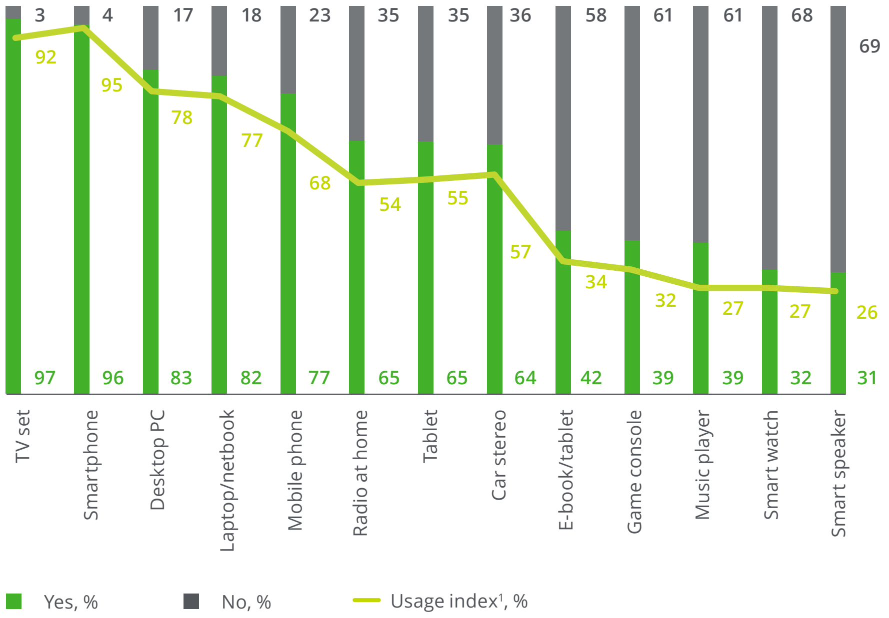
- The share of gadget enthusiasts continues to grow:
  - In 2021, the share of those who try to buy new gadgets
  - as soon as they appear on the market increased by **3 pp,** to **9%** (**+5 pp** vs. 2019);
  - The share of those buying new gadgets before they go mainstream grew by **3 pp** to **21%** (**+8 pp** vs. 2019).
- The number of 'tested technology' users went down. The share of respondents who prefer devices that are "time tested" has declined by **10 pp** since 2019, to **29%** in 2021.

Insights

- In 2021, over **34%** of medium-income respondents stated that they buy new gadgets only after comparing them to other devices. This approach is more common among women than men (**31%** vs. **27%**).
- A higher share of respondents who prefer to buy new gadgets after comparing them to similar devices has a higher education **(30%).**
- Compared to other social groups, students tend to buy new gadgets before they go mainstream **(28%).**
- New gadgets are most frequently purchased right after they appear on the market by higher-income respondents **(19%).**

Russian household ownership of media devices

Do you own any of the devices listed below?



Trends

- In 2021, there were slight changes to patterns in household ownership of media devices. Smartphone usage increased by **1 pp;** desktop PC **(+3 pp),** and laptop **(+2 pp)** usage also grew. The share of TV set owners has remained unchanged in the last year **(97%).**
- The popularity of smart speakers surged by **8 pp** vs. 2020. In 2021, **31%** of respondents owned such a device.

Insights

- Residents of cities with a population of one million or more are more likely to buy the latest gadgets than other respondents. Thus, smart speakers are used more often in large cities with a population of over one million **(35%).**
- The highest rates of smartwatch usage were recorded in the Northwestern Federal District **(36%),** while the largest share of people who do not use this device are in the Volga Federal District **(73%).**
- **31%** of respondents from the Far Eastern Federal District do not own laptops/netbooks. The share of laptop/netbook owners is highest in the Central Federal District **(87%).**
- The share of respondents aged 50–54 who own a TV set reached **95%,** which is the highest among all age groups. TV set usage is the lowest among respondents aged 14– 19 and 20–24 (**78%** and **84%** respectively).

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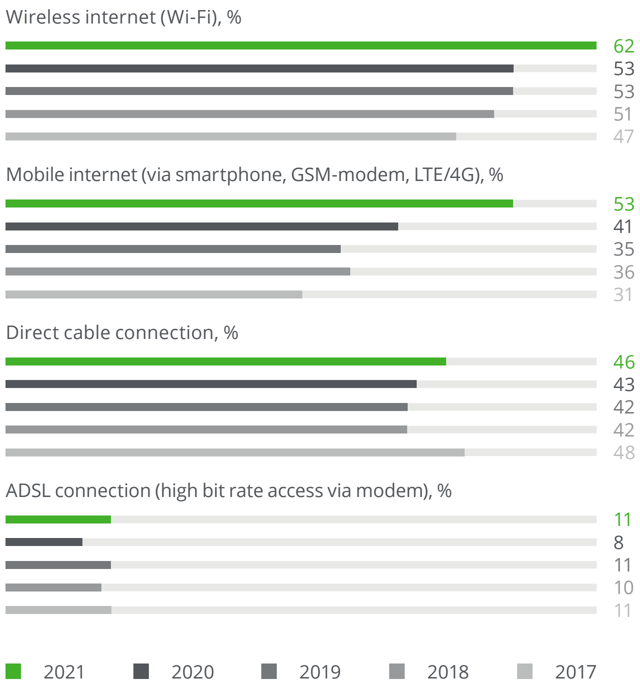
[1] Usage index: [the share of respondents who own and use a device] minus [the share of those who own a device without using it]

Internet connectivity

What type of internet connection do you use?



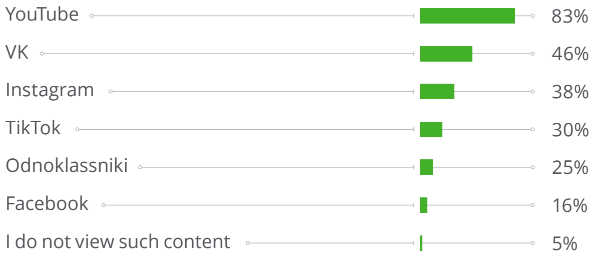
Trends

- Wi-Fi became the most popular type of internet connection in 2021 (at **62%**); its usage increased by **9 pp** vs. 2020.
- Mobile internet usage increased significantly too (**53%** vs. **41%** in 2020).

Insights

- Mobile internet usage is the least popular
- in the Southern Federal District (**46%** of all respondents) in contrast to the Far Eastern Federal District, where it is used the most **(59%).**
- Wi-Fi usage is the highest in Moscow and St. Petersburg (**69%** and **67%** respectively).
- **58%** of women use mobile internet, while **56%** of men use a direct cable connection.

What resources do you use to watch (free) user content?



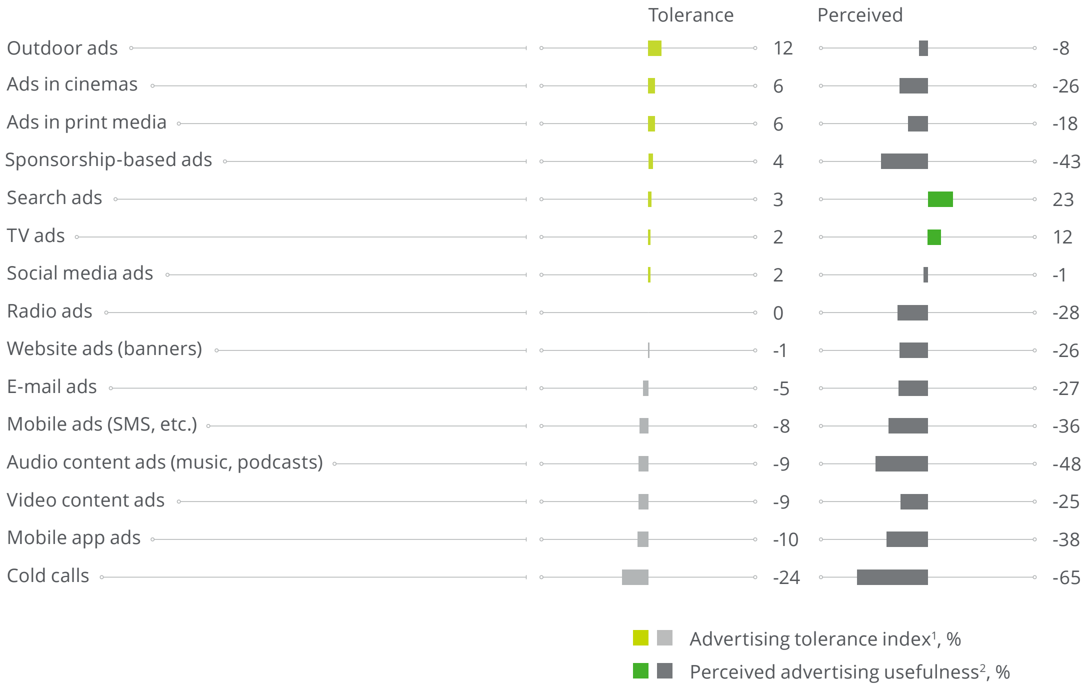
Insights

- YouTube is the most popular video platform for watching user-created video content **(83%).** Respondents from cities with a population of less than 0.5 mln view YouTube content more frequently on average **(86%).** Meanwhile, men tend to view YouTube content more often than women (**87%** vs. **79%**).
- TikTok is the preferred platform for residents of the Far Eastern Federal District **(41%).** Women tend to use TikTok **(36%)** more often than men **(23%).**

Attitudes towards advertising

Tolerance and perceived usefulness

How do you feel about various advertising channels?
Have you received useful information from ads?



Tolerance

- Similarly to the last year, respondents showed overall tolerance to outdoor ads **(12%).** Interestingly, women are two and a half times more tolerant to this type of advertising than men (**16%** vs. **6%**). Women are also more tolerant to advertising in cinemas (**10%** vs. **1%**), as well as to ads in print media (**8%** vs. **4%**).
- Older respondents (aged 45–59 and over 60) are less tolerant to TV ads (**-3%** and **-9%** respectively) than younger respondents aged 14–44 **(8%).** Young respondents aged 14–29 are the most tolerant to outdoor ads **(16%),** advertising in cinemas **(12%)** and social media ads **(9%).**

Perceived usefulness

- Search ads are perceived as the most useful online advertising channel **(23%).** Last year, in contrast, the leader in this category was television **(18%).**
- Among respondents aged 14–29, the search ad usefulness index reached **37%**, which is the highest level in this category, exceeding even social media ads **(33%).**

> *"Advertising is not something negative. It does inform you and help you make a choice. However, this is only possible when advertising meets certain ethical and social standards.»*
>
> **Focus group**

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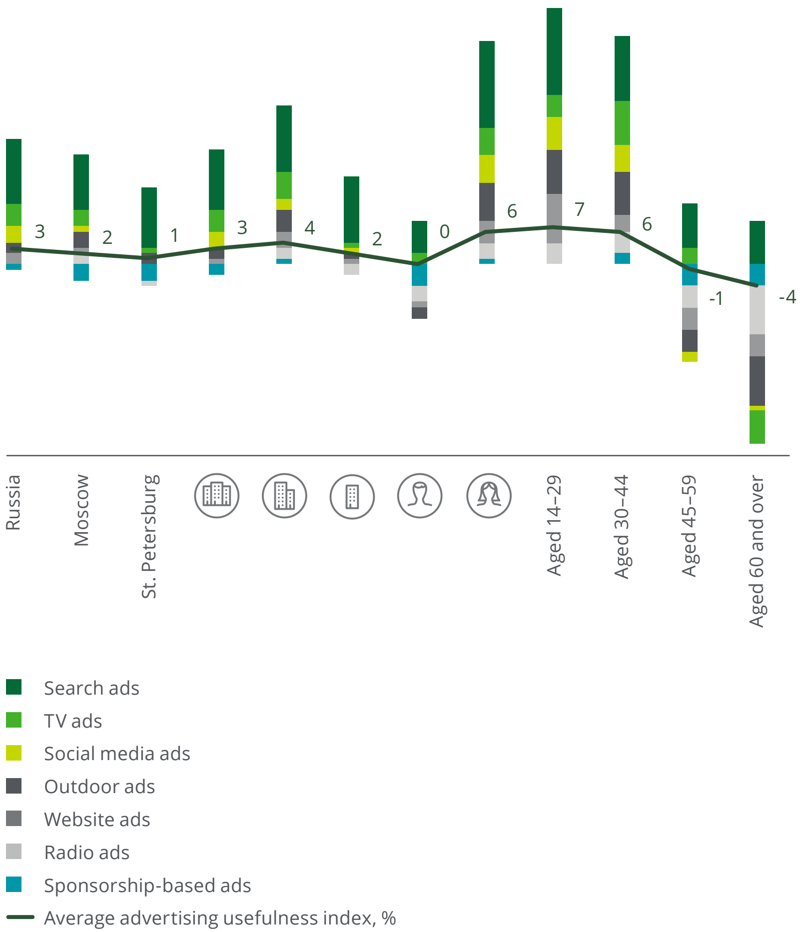
[1] Advertising tolerance index: [the percentage of respondents who favor ads] minus [the percentage who disapprove of them]

[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]

Tolerance towards various advertising channels

How do you feel about various advertising channels?



Insights

- The advertising tolerance index for key advertising channels reached **3%.**
- The most tolerant audience comprises respondents aged 14–29 (their average tolerance index is **7%**).
- Men only have positive attitudes towards outdoor ads **(6%)** and sponsorship-based ads **(2%);** they perceive all other advertising channels negatively.
- Respondents from cities with a population of less than 0.5 mln are more tolerant to outdoor advertising (with a tolerance index of **12%**) than Muscovites **(10%)** and residents of St. Petersburg **(11%).**
- TV ads are perceived most negatively among over-60s **(-9%),** although this group shows a high tolerance to outdoor ads **(8%).**
- Survey participants are also tolerant
- to sponsorship-based ads, as the average tolerance index reached **4%** in this category, taking fourth place. Respondents aged 30–44 have the most positive attitudes towards this advertising channel (with a tolerance index of **8%**).

"In the last five years, advertising content has improved, as new channels have appeared and there's more personalization. However, to get their audiences' attention, advertisers often walk the brink: sometimes ads can be arrogant or inappropriate, which causes problems."

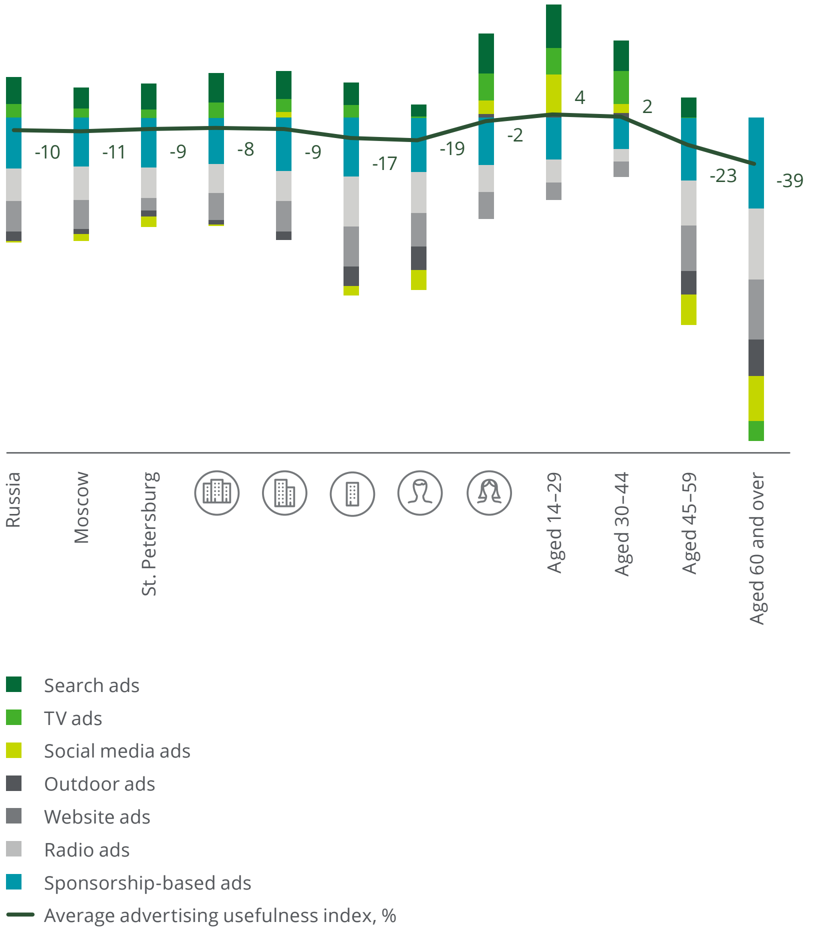
"The current algorithms for targeted ads do work, but they do not impact advertising quality or content, which can often alienate the viewer."

"Ads embedded in content that complement the subject are usually well perceived. Sometimes I even decide to watch such ads: most ads I usually skip."

Focus group

Perceived usefulness of various advertising channels

Have you ever received useful information from ads?



Insights

- The average usefulness index for key advertising channels is **-10%.**
- The respondents most likely to find ads useful are younger individuals aged 14–29 (at **4%**). Young people report that search ads **(37%),** social media ads **(33%)** and television ads (23%) are most useful.
- Women believe search ads **(34%),** website ads **(23%)** and television ads **(22%)** to be the most useful. Conversely, people aged 60 and over believe that advertising is not useful at all (the average index for all advertising channels is **-39%**).
- Men listen to the radio more often than women, but they find radio ads less useful (**-34%** vs. **-23%** among women).
- Advertising in social media ranks third by usefulness **(-1%)** among all formats, but women perceive it as the most useful (**13%** vs. **-17%** among men).
- Residents of Moscow, St. Petersburg and cities with a population of over one million believe that only two advertising channels are really useful: television and search ads.

"The abundance of advertising contributes to hyper-consumerism. Advertising does not help you make the right choice, it pushes you to make any choice."

"It's good to have lots of ads. That's how companies compete for the market. It allows you to choose the offer that is best aligned with your needs."

Focus group

Change in tolerance and perceived usefulness of ads

Change in tolerance to ads, %

		2021	2020	2019	2018	2017
🟩	Outdoor ads	+12	+11	+12	+13	+12
🟩	Print media ads	+6	+6	+8	+9	+7
🟩	Sponsorship-based ads	+4	+2	-[1]	-	-
🟩	Average index	+4	+2	+3	+4	2
⬛	Search ads	+3	+6	-	-	-
⬛	Website ads	-1	-4	-2	0	5
⬛	Social media ads	+2	-3	-	-	-
⬛	TV ads	+2	0	-2	-1	0
⬛	Radio ads	0	-2	-1	-1	-2

Trends

- In 2021, there was a positive change in the average advertising tolerance index. There was growth vs. 2020 and recovery to the 2018 level **(+4%).**

Insights

- In 2021 respondents positively perceived most advertising channels presented in the survey. Website ads are the only exception **(-1%).** The attitudes of respondents to this channel were negative last year too **(-4%).**
- There was an uptick in tolerance
- to social media ads **(2%),** TV ads **(2%)** and sponsorship-based ads **(4%).**
- The level of tolerance to outdoor and print media ads has remained stable for the last five years (**12%** and **6%** in 2021, **12%** and **7%** in 2017 respectively).

Change in perceived usefulness of ads, %

		2021	2020	2019	2018	2017
🟩	Search ads	+23	+3	-	-	-
🟩	Website ads	-26	-15	+28	+26	-19
🟩	Social media ads	-1	-18	-	-	-
🟩	TV ads	+12	+18	+15	+17	+17
🟩	Outdoor ads	-8	-8	-3	+1	-4
🟩	Average index	-11	-14	-2	+2	-9
⬛	Print media ads	-18	-11	-12	-4	-9
⬛	Radio ads	-28	-29	-36	-30	-29
⬛	Sponsorship-based ads	-43	-51	-	-	-

Trends

- In 2021, the negative trend in perceived usefulness of advertising continued. However, the steepness of this fall decreased slightly (**-11%** vs. **-14%**).
- These changes were driven mainly by higher subjective assessment of search ad usefulness (from **3%** in 2020 to **23%** in 2021), as well as by shifts in perception of social media ads in the last year **(+17 pp).**

Insights

- Search and TV ads are perceived as the most useful (**23%** and **12%** respectively). Although TV ads have been perceived positively in the last five years, their usefulness index has recently decreased by **5 pp** (compared to **17%** in 2017).
- The usefulness of sponsorship-based ads.
- **(-43%),** radio ads **(-28%)** and website ads **(-26%)** were perceived as the least useful.
- In 2021, social media ads were considered more useful than in 2020 (**-1%** vs. **-18%**), but their index remained below zero.

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[1] Here and below, the strikethrough is used for categories where the data is from 2020.

Advertising by product category

Please specify the product category for which you obtained useful information from advertising[1]

	Average[2]	TV ads	Search ads	Social media ads	Website ads	Outdoor ads	Radio ads	Sponsorship-based ads
Food (excl. beverages)	38%	60%	37%	31%	36%	42%	33%	28%
Clothes	34%	37%	44%	46%	34%	27%	23%	23%
Cosmetics and perfumes	33%	44%	42%	42%	30%	28%	21%	24%
Electronics	33%	38%	42%	33%	34%	32%	23%	26%
Services	31%	29%	33%	34%	27%	32%	39%	19%
Household appliances	29%	39%	38%	27%	28%	29%	23%	21%
Household chemicals	26%	39%	29%	23%	25%	24%	21%	21%
Medicine	25%	41%	30%	24%	20%	19%	25%	14%
Non-alcoholic drinks	22%	27%	20%	16%	24%	24%	19%	26%
Video games, movies and software	19%	26%	26%	24%	18%	13%	15%	9%
Cars	18%	18%	18%	12%	18%	14%	18%	27%
Household goods	16%	17%	18%	19%	18%	15%	12%	9%
Products and toys for children	13%	17%	16%	16%	12%	13%	10%	8%

Respondents believe **TV advertising** in the following product categories to be the most useful:

- Food — **60%;**
- Cosmetics and perfumes — **44%;**
- Medicine — **41%.**

Search ads:

- Clothes — **44%;**
- Cosmetics and perfumes — **42%;**
- Electronics — **42%.**

В рекламе в социальных сетях:

- Clothes — **45%;**
- Cosmetics and perfumes — **42%;**
- Services — **34%.**

> *"The volume of advertising has increased, it has become ubiquitous. There is too much advertising, so it's becoming more difficult to filter out useful information from this 'advertising noise.'»*
>
> **Focus group**

> *"Loud, glossy and obtrusive ads that interrupt broadcasting or hide some of the content are the most repulsive."*
>
> **Focus group**

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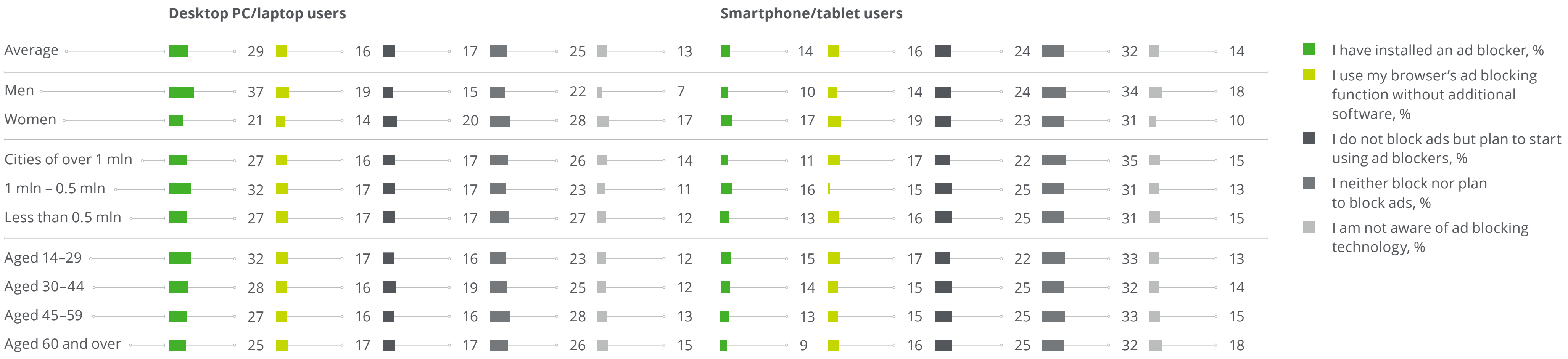
[1] This question was only put to respondents who reported having obtained useful information from the respective advertising categories.

[2] The average percentage for reviewed advertising channels

Ad blockers

Do you use ad blockers (software that blocks adds on websites or apps)?



	Desktop PC/laptop users					Smartphone/tablet users				
Average	29	16	17	25	13	14	16	24	32	14
Men	37	19	15	22	7	10	14	24	34	18
Women	21	14	20	28	17	17	19	23	31	10
Cities of over 1 mln	27	16	17	26	14	11	17	22	35	15
1 mln – 0.5 mln	32	17	17	23	11	16	15	25	31	13
Less than 0.5 mln	27	17	17	27	12	13	16	25	31	15
Aged 14–29	32	17	16	23	12	15	17	22	33	13
Aged 30–44	28	16	19	25	12	14	15	25	32	14
Aged 45–59	27	16	16	28	13	13	15	25	33	15
Aged 60 and over	25	17	17	26	15	9	16	25	32	18

🟩 I have installed an ad blocker, %

🟨 I use my browser's ad blocking function without additional software, %

⬛ I do not block ads but plan to start using ad blockers, %

◼ I neither block nor plan to block ads, %

◻ I am not aware of ad blocking technology, %

Insights

- **46%** of smartphone/tablet owners do not use and do not plan to use ad blockers; some such respondents do not even know that such software exists.
- Among desktop PC/laptop users, younger respondents aged 14–29 use ad blockers the most frequently **(32%).** The key reasons they cited for blocking advertisements include obtrusiveness **(37%)** and the large volume of ads **(36%).**
- **29%** of desktop PC/laptop users have installed special ad blockers. Men tend to install such software more often than women (**37%** vs. **21%**). The reasons cited by men for installing ad blockers include obtrusiveness **(41%)** and the large volume of ads **(36%).** **28%** of women do not plan to use ad blockers on their laptops/desktop PCs.

> *«I am willing to pay not to view web advertisements, as the large volume of ads distracts me from media content. The ill-conceived advertising strategy of companies targeting a broad audience results in ads that are irrelevant for me."*
>
> **Focus group**

Top three reasons for installing ad blockers[1]

38% Obtrusiveness of ads

35% Large volume of ads

11% Desire to speed up website loading time

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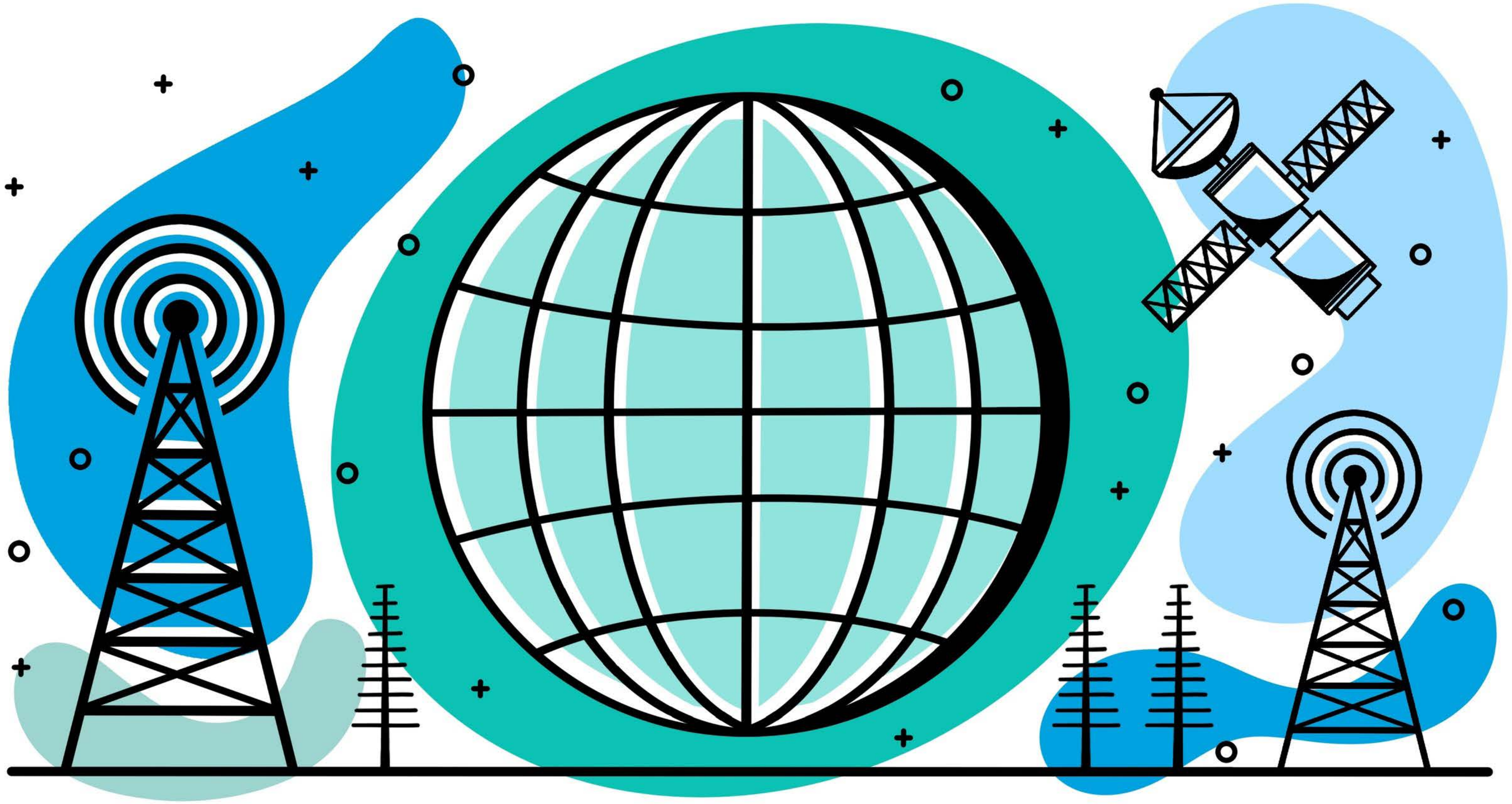
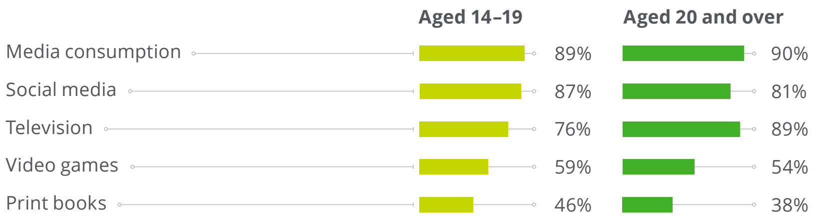
[1] According to respondents who deliberately use ad blockers

Media consumption in figures



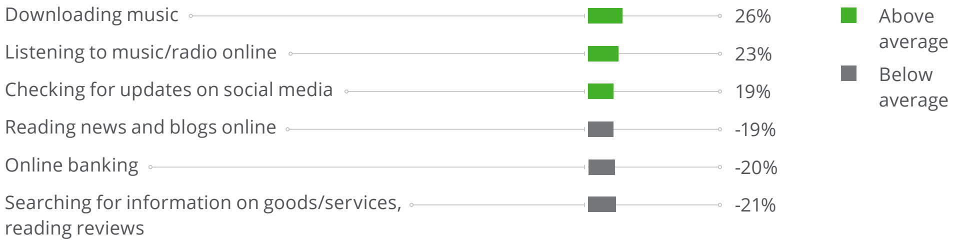
Media consumption among respondents aged 14–19[1]

? *Please specify which of the following activities you took part in over the past two weeks*



The top three media channels remains the same for the entire sample, similarly to last year. However, TV usage among young respondents decreased to **76%** vs. **89%** across Russia on average, sliding to third position.

Goals of internet usage among young respondents



Young respondents use the internet to listen to audio and check for updates on social media much more often than others. In contrast, they seldom read reviews of goods and services, engage in online banking, or read news and analytics.

Respondents in this age group are far less likely to prefer Russian media than the national average (by **14 pp**). Younger respondents are more likely to state that the country of origin of a media outlet does not matter much (**10 pp** more than the national average). In addition, young people choose to consume foreign news sources more often than other Russian respondents (**4 pp** more than the average level), especially when it comes to radio (by **9 pp**) and TV (by **5 pp**).

Overall, young respondents tend to be more neutral (by **3 pp**) towards advertising than the national average. They are more tolerant to advertising on social media (by **7 pp**), cinemas (by **3 pp**), outdoor ads (by **3 pp**) and video content (by **2 pp**).

57% of young respondents use paid subscriptions for web services or content, vs. **43%** of other groups. **39%** of them have paid subscriptions for video content or services, which is below the average **(44%).** At the same time, **43%** of young respondents use paid music subscription, which is higher than the national average of **32%.**

Young people are less concerned about how their personal data is used than the national average, at **54%** and **72%** respectively.

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[1] We analyzed this group separately, as opinions of respondents aged 14–19 differ significantly from the average of the entire sample, and they are likely to have a material impact on the transformation of media consumption in the future.

Appendix (1/2)

For what purpose do you use the internet? How often?

	I use it frequently/ regularly	I have used it in the past	I never use the internet
Phone calls			
Internet calls	44%	47%	8%
Video calls	25%	57%	18%
Social media			
Checking for updates on social media	66%	29%	5%
Informal communication	62%	34%	3%
Messaging			
Messengers	73%	22%	5%
Business/formal communication (email)	53%	40%	7%
News sourcing			
Searching for specific information	66%	32%	2%
Reading news, analytical journals, etc.	49%	45%	6%
Digitalization of every day tasks			
Work, money making	45%	45%	11%
Online banking	62%	35%	3%
Investment management	12%	29%	59%
Government services, paying for government services	33%	62%	5%
Online medical services	17%	63%	20%
Pastimes			
Video games	32%	41%	28%
Video lessons	14%	48%	39%

	I use it frequently/ regularly	I have used it in the past	I never use the internet
Online shopping			
Searching for information on goods/services	57%	42%	2%
Visiting the websites or applications of online stores	52%	45%	3%
Buying food online	18%	50%	32%
Online purchases	41%	55%	4%
Ordering ready-to-eat food online	18%	55%	28%
Paying for services	25%	50%	25%
Buying tickets online (cinema/theatrical events)	13%	61%	26%
Buying air/railway tickets, booking accommodation	13%	62%	25%
Media content			
Watching movies/TV series	46%	47%	8%
Downloading video content	41%	50%	8%
Viewing user video content	62%	36%	2%
Listening to music/radio online	42%	50%	8%
Downloading music	35%	57%	8%
Listening to podcasts	18%	52%	31%
Downloading and reading books	21%	54%	25%

Appendix (2/2)

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

	More frequent use	Less frequent use
Phone calls		
Mobile calls	24%	9%
Online calls (Skype, etc.)	26%	7%
Video calls (Skype, Zoom)	17%	10%
Messaging		
SMS	14%	19%
Messengers (WhatsApp, Telegram)	33%	5%
Business/formal communication (e-mail)	18%	8%
News sourcing		
Searching for specific information	25%	5%
Reading the news	19%	7%
Checking for updates on social media	24%	6%
Media content		
Watching movies, TV series online	20%	7%
videos	18%	9%
Viewing user-made video content (YouTube)	29%	6%
Listening to music/radio online	19%	9%
Downloading and listening to music	17%	9%
Listening to podcasts	11%	9%
Downloading and reading books	12%	12%

	More frequent use	Less frequent use
Digitalization of house-keeping / home maintenance tasks		
Online banking	27%	5%
Government services, paying for government services	19%	7%
Working, earning money	29%	6%
Pastimes/hobby		
Video games	15%	10%
Tracking physical activity and health	10%	8%
Video lessons	12%	9%
Online shopping		
Searching for information on goods/services	24%	5%
Viewing websites or applications of online	22%	7%
Buying food online	19%	7%
Online purchases	30%	8%
Ordering ready-to-eat food online	17%	10%
Buying food online	19%	7%

Average media source usage

🌐	On weekdays: 3 hours 43	On weekends: 4 hours 13
📺	On weekdays: 2 hours 25	On weekends: 3 hours 27
📻	On weekdays: 1 hour 00	On weekends: 1 hour 24
📰	On weekdays: 0 hours 38	On weekends: 0 hours 46
🎮	On weekdays: 1 hour 38	On weekends: 2 hours 27

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