

# BBG Research Series



## Contemporary Media Use in Russia



# Russia at a Glance

Findings from the World Poll

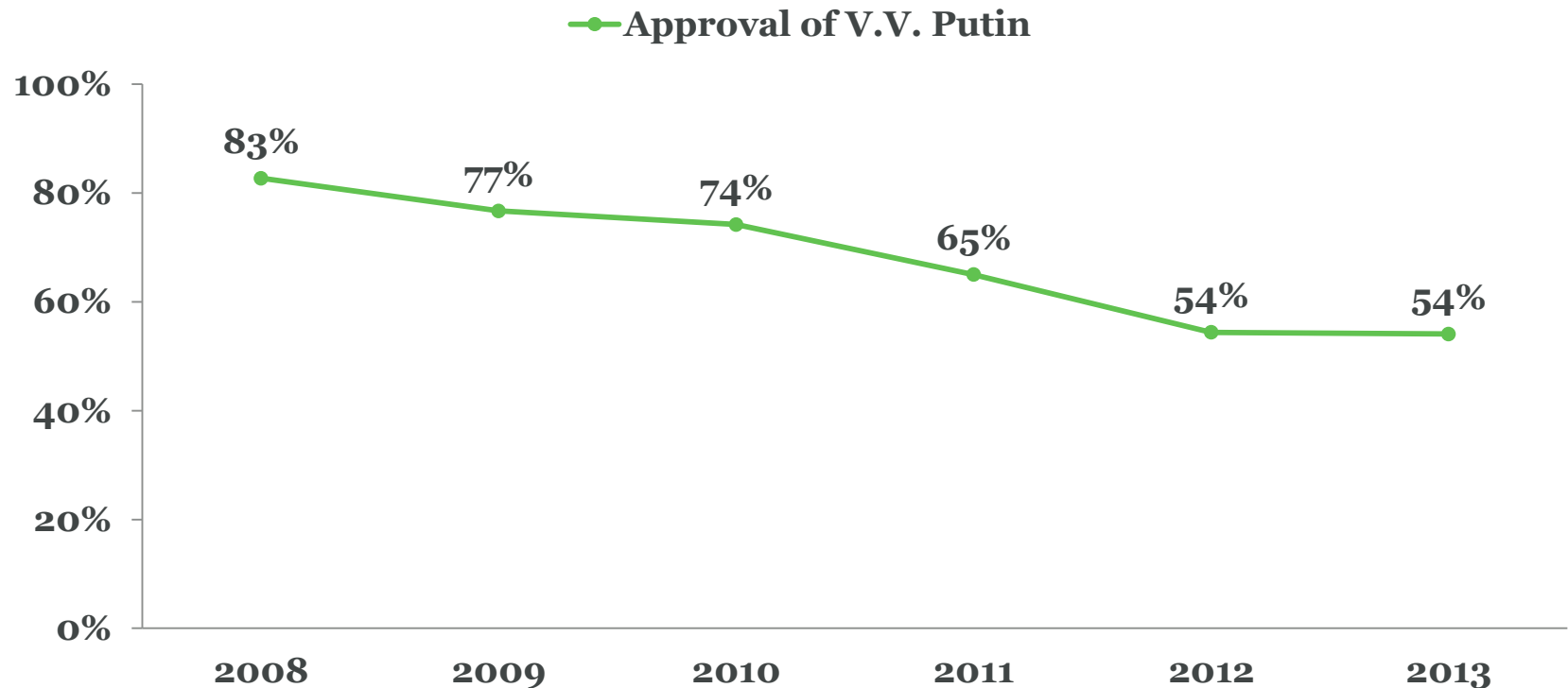
# World Poll Russia Surveys — Background

- Since 2006: 8 annual national surveys of individuals aged 15 and older – 2 waves in 2010 and 2012
- Nationally representative of about 120 million Russian adults
- Largest country in the world: about 6,602,000 square miles – 6,500 miles east to west
- Geographic exclusions in 2013 of politically unstable, high crime level or remote areas representing about 6% of the total population
- Sample size: 2,000 per year
- Face-to-face mode



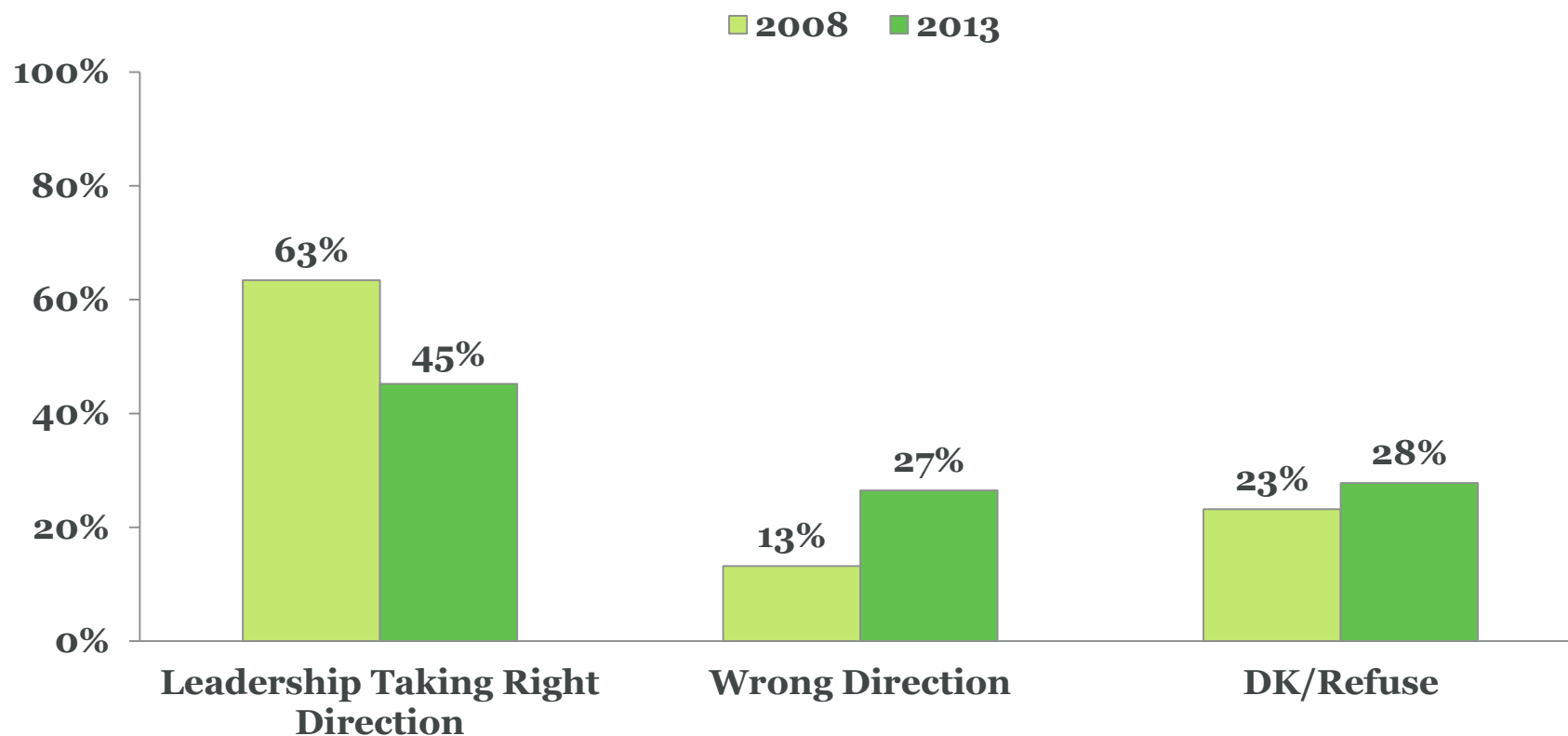
# Approval of Vladimir Putin

Do you approve or disapprove of the way **Vladimir Putin** is handling his job as President/Prime Minister? **(Approve)**



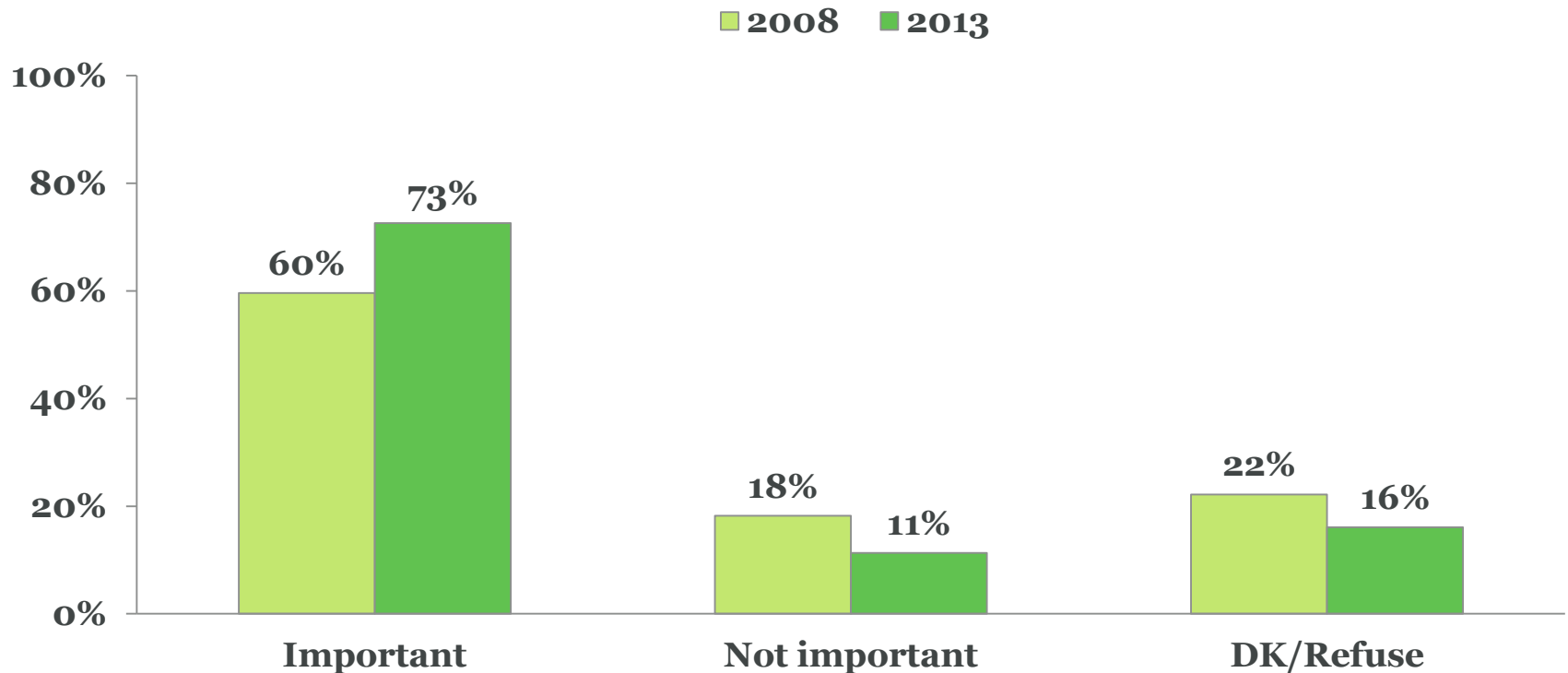
# Leadership Taking Country in the Right Direction

*Is the leadership of Russia taking it in the right direction or wrong direction?*



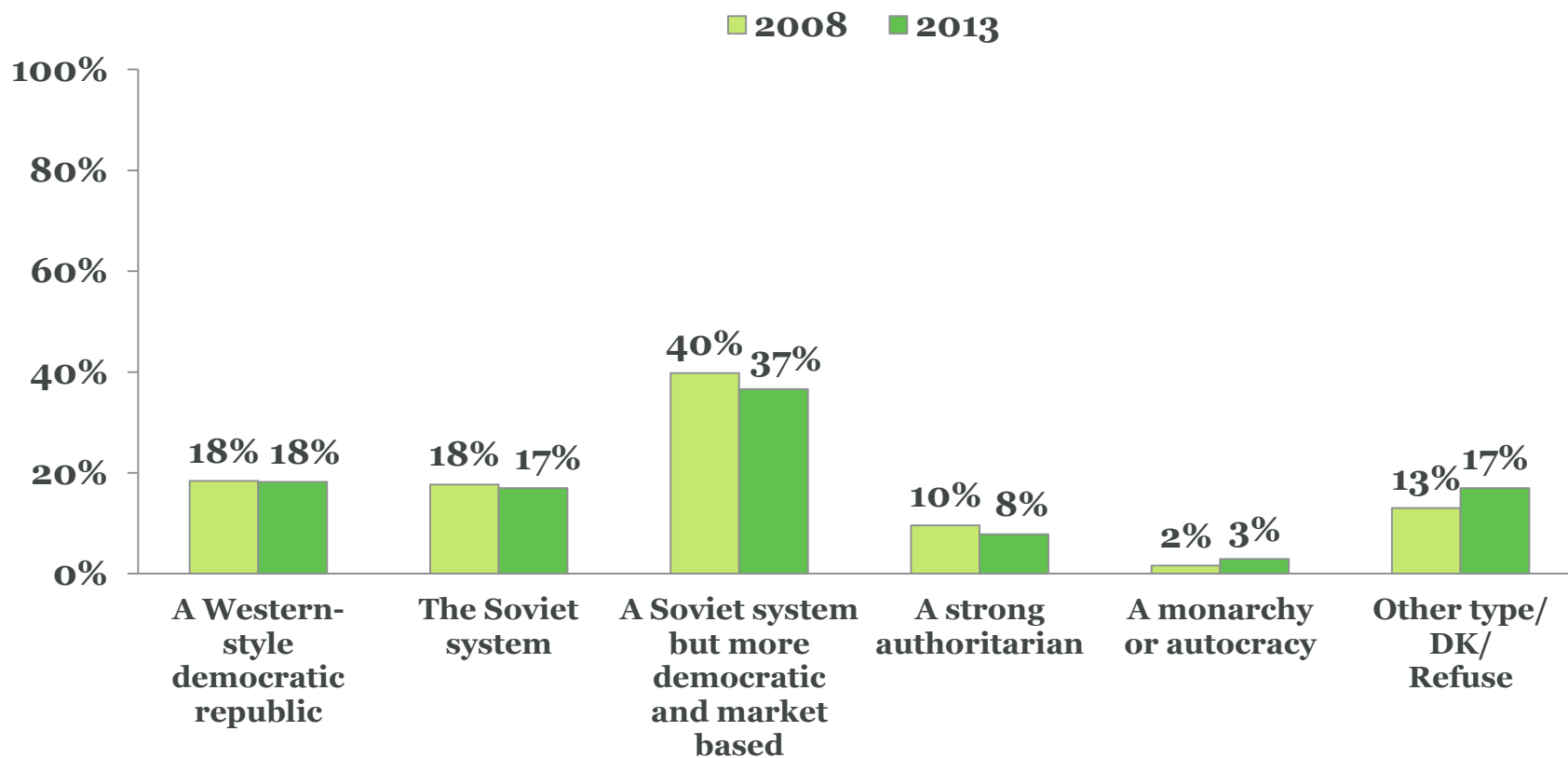
# Importance of Democracy

*Some people think that democracy is important for the development of a country; other people think that democracy is not important for the development of a country. What is your opinion?*



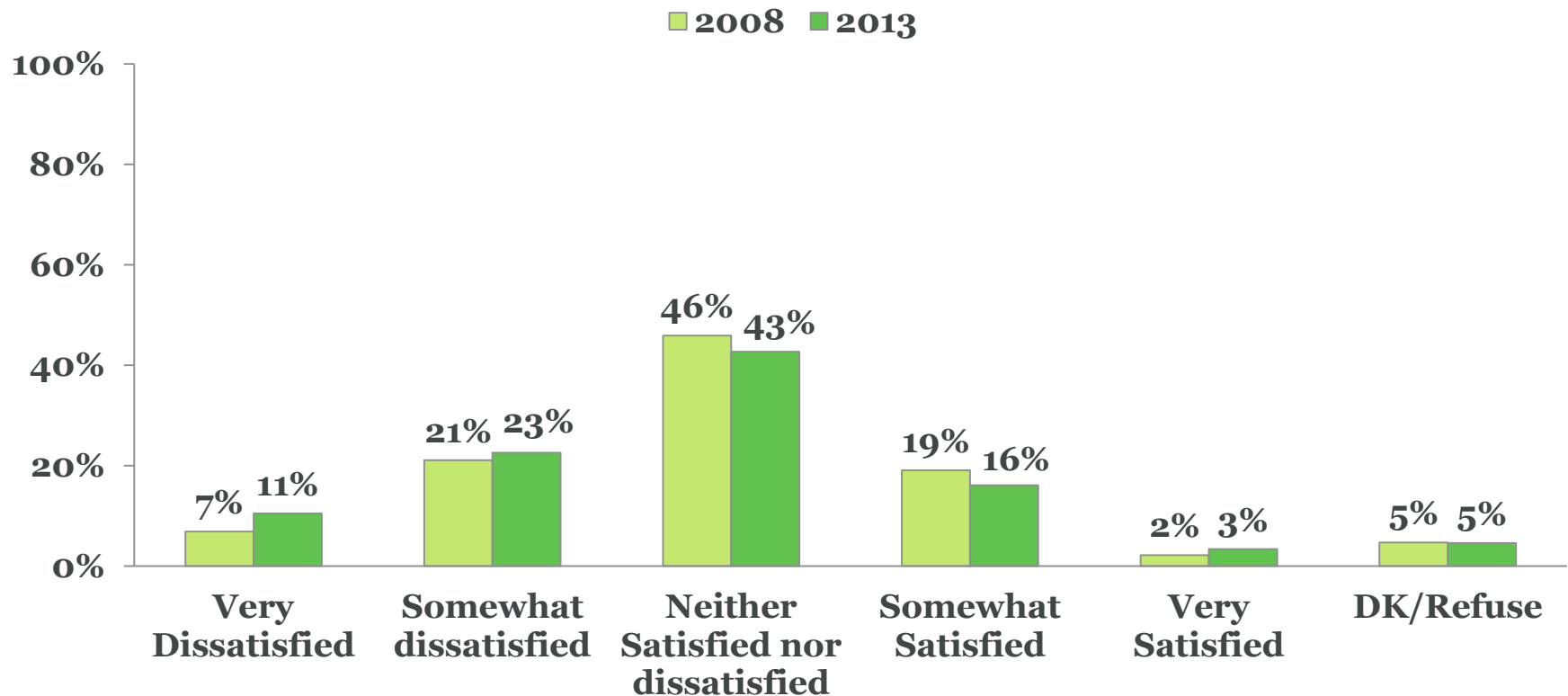
# Most Suitable Political System for Russia

*In your opinion, which political system is the most suitable for Russia?*



# Satisfaction with the Way Democracy Works in Russia

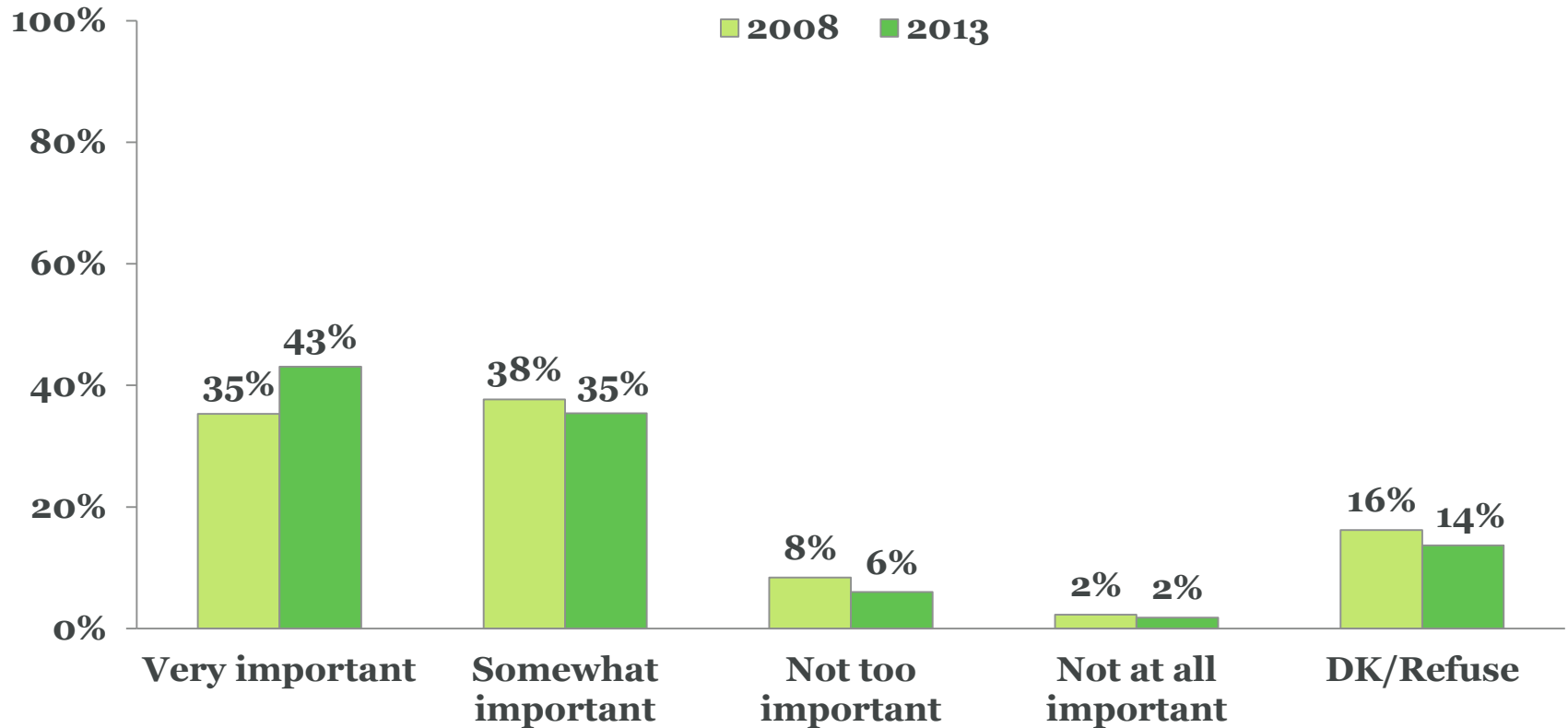
*How satisfied are you with the way democracy works in this country?*





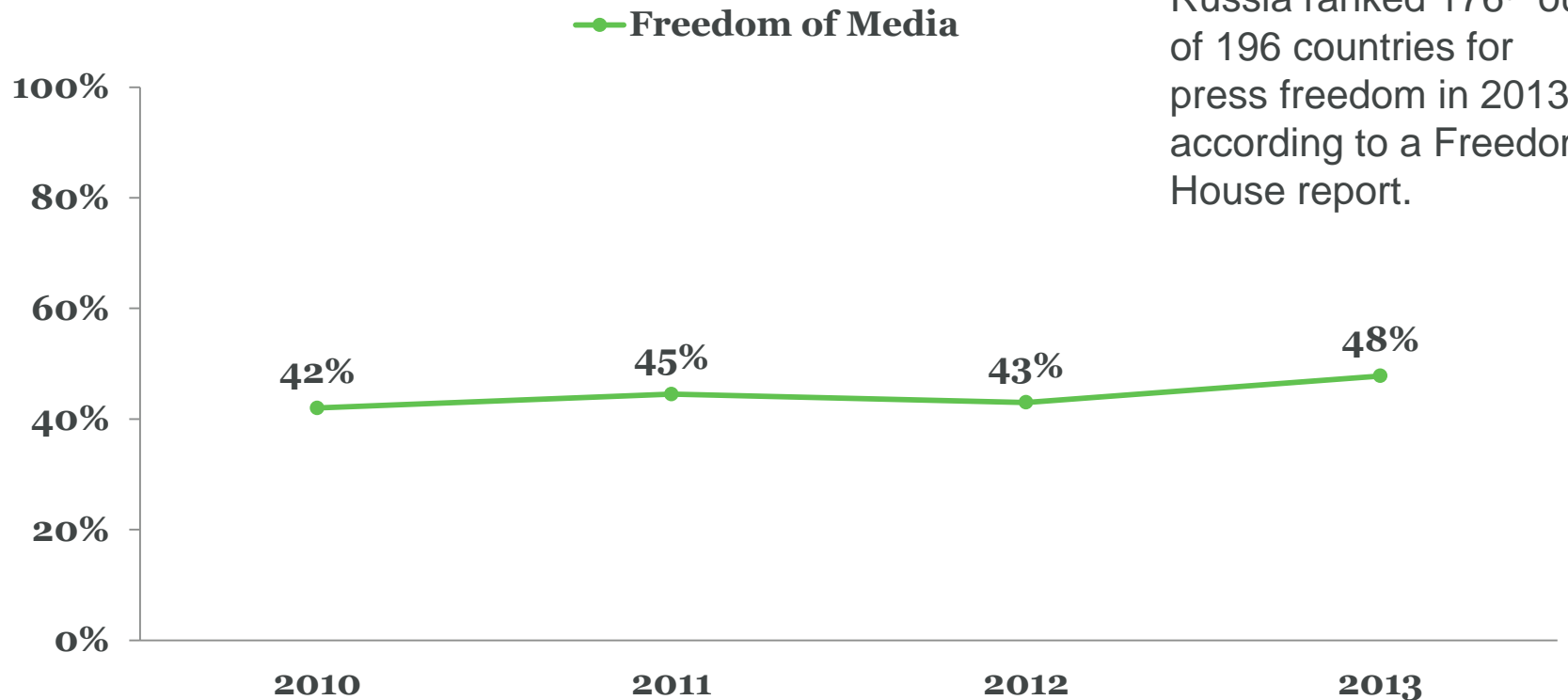
# Importance of Active Opposition

*How important is it for Russia to have active opposition?*



# Freedom of Media

*Do the media in this country have a lot of freedom, or not? (Yes)*



<http://www.freedomhouse.org/sites/default/files/Global%20and%20regional%20tables.pdf>



# Media and News in Russia

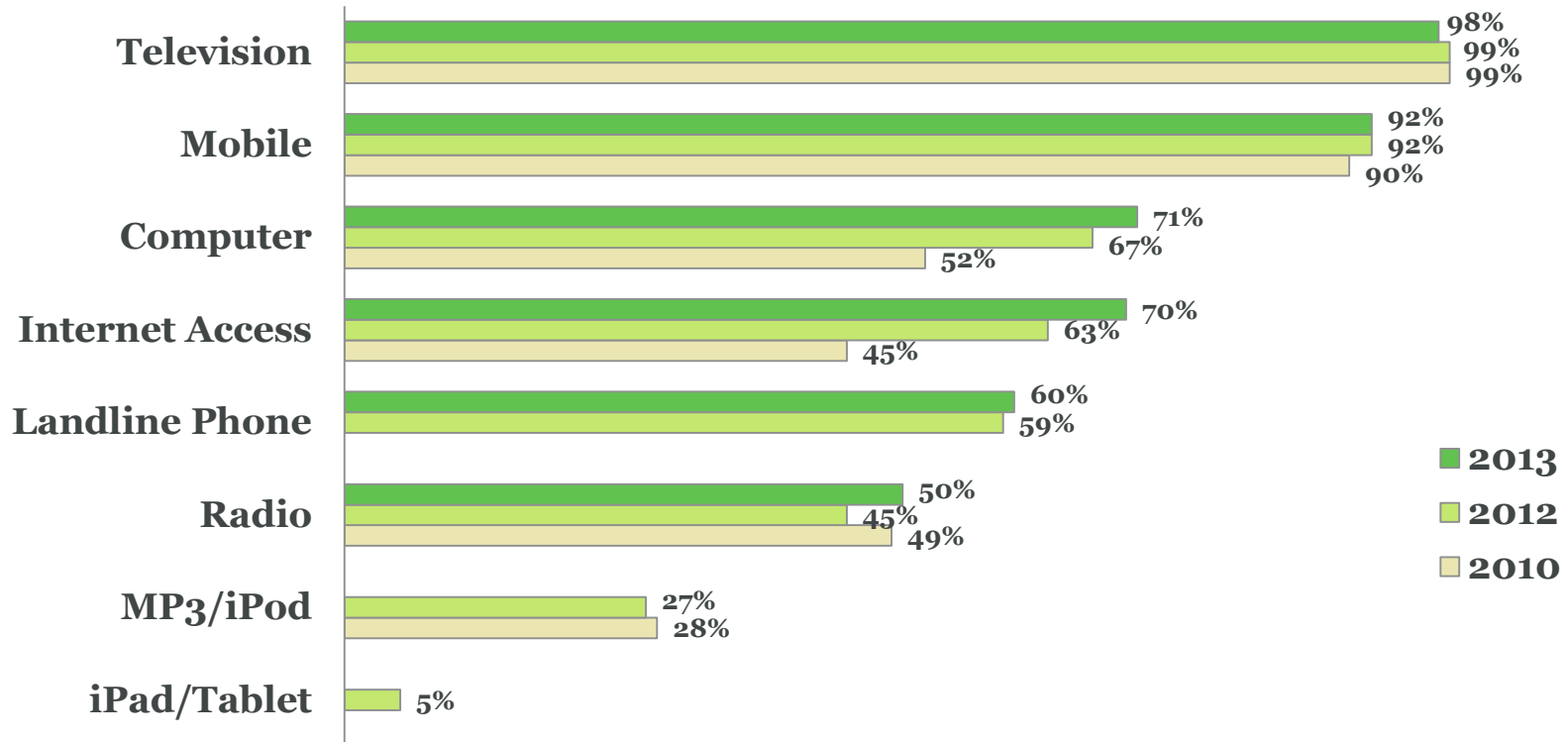
Results from the November 2013 Gallup-BBG National Survey

# BBG Media Survey Background

- National survey representative of 120,540,000 adults (ages 15 and older) in Russia, 95% of the total adult population. Not covered by the survey are:
  - those doing military service (about 0.7% of the adult population)
  - those imprisoned (about 0.5% of the adult population)
  - adults in remote areas in the Far North and Far East (1.9%)
  - those in rural settlements with  $\leq 50$  inhabitants (about 0.8%)
  - Homeless people (from 1.0% to 1.5% of the adult population)
- 5,012 face-to-face interviews conducted 31 October-26 November 2013
- Probability sample stratified by
  - eight regions (plus Moscow and St. Petersburg), and
  - within regions, by settlement population sizes ( $\geq 1,000,000$ , 500,000-999,999, 100,000-499,000, 50,000-99,999, 10,000-49,999, and  $< 10,000$ )
- Comparable national survey in June 2012 (n=5,000), and an earlier BBG survey in Dec. 2010 with some differences in sampling and question text and structure.

# Home Access to Media — 2010-2013

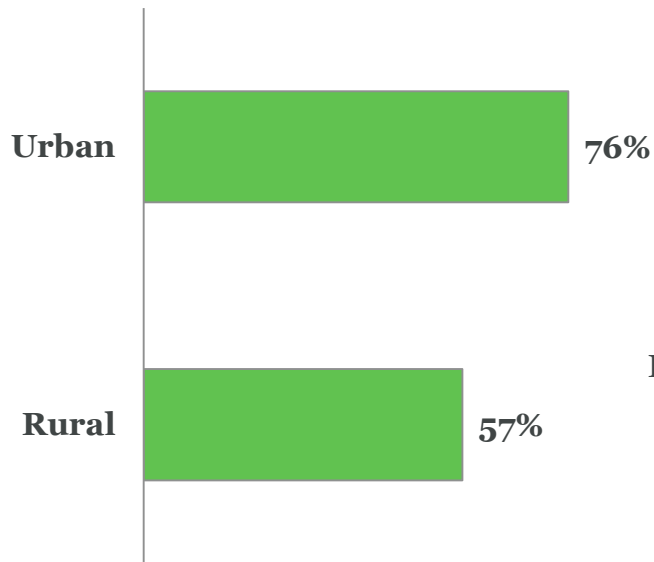
Which, if any, of the following do you have working in your household?



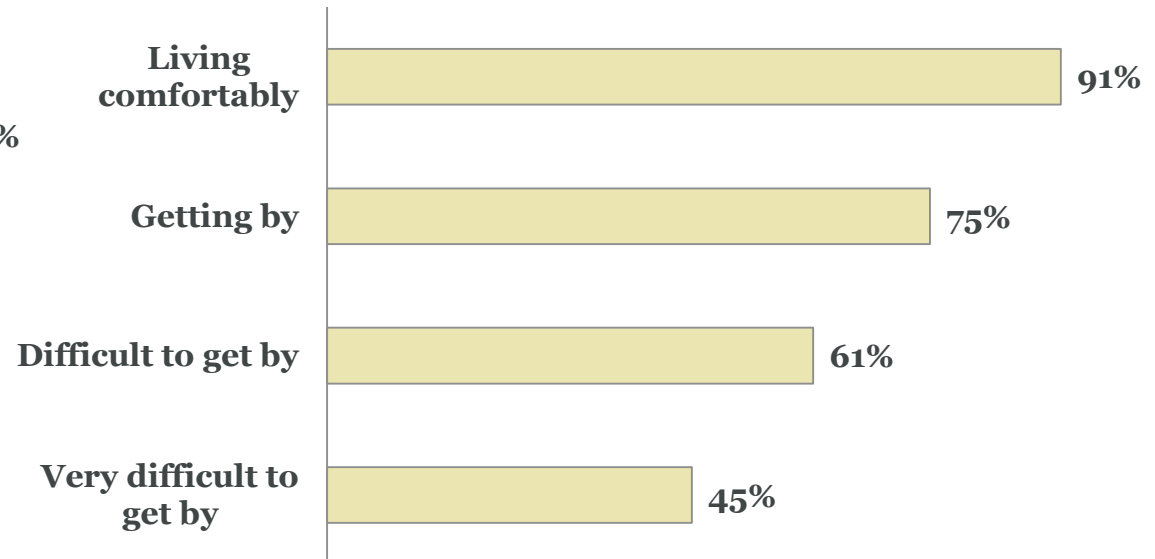
Bases: all respondents (Nov. 2013 n=5,012; June 2012 n=5,000; Dec. 2010 n=4,633)

# Urban/Rural and Income Gaps in Home Internet Access – 2013

**% adults who have high-speed home Internet access by urbanicity and feelings about income**



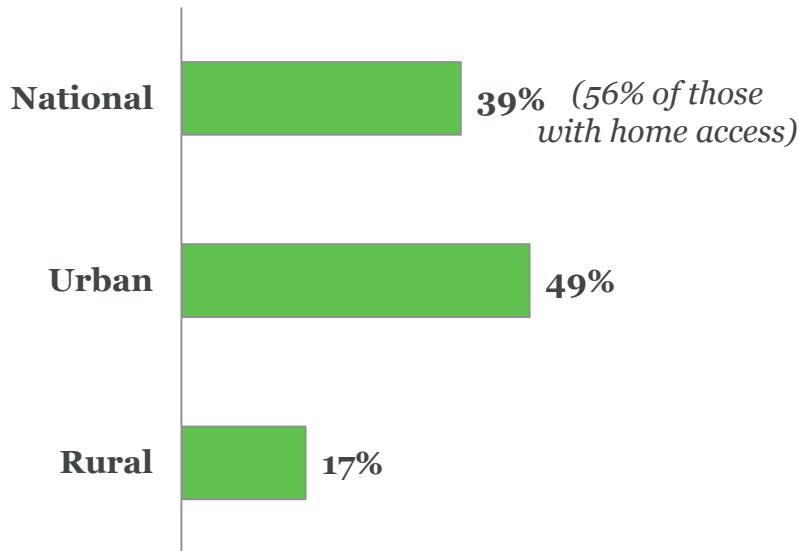
*Which one of these phrases comes closest to your own feelings about your household's income these days?*



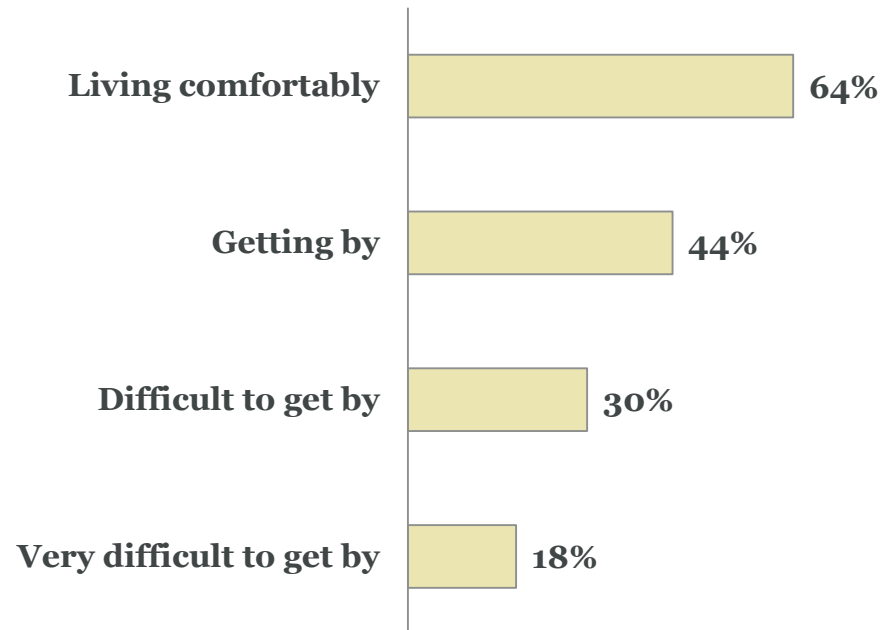
*Bases: Urban n=3,485, Rural n=1,527; "Living comfortably" n=457, "Getting by" n= 2,267, "Finding it difficult" n=1,723, "Finding it very difficult" n=330. (Nov. 2013)*

# Urban/Rural and Income Gaps in Home High-Speed Internet Access – 2013

**% adults who have high-speed home Internet access by urbanicity and feelings about income**



*Which one of these phrases comes closest to your own feelings about your household's income these days?*

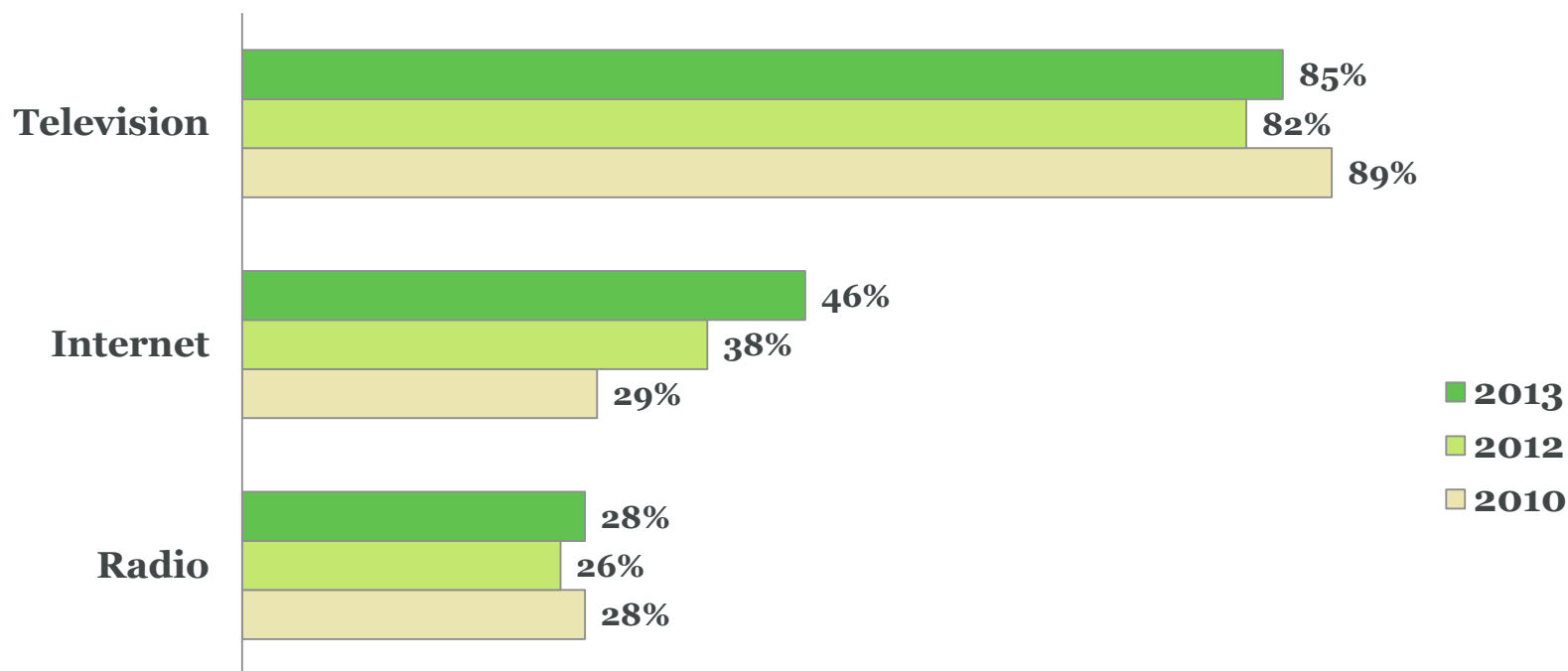


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# Daily Overall Use of Media 2010-2013

*Apart from today, when did you last watch/when was the last time you listened/you used...*

**% of adults using medium daily (yesterday)**



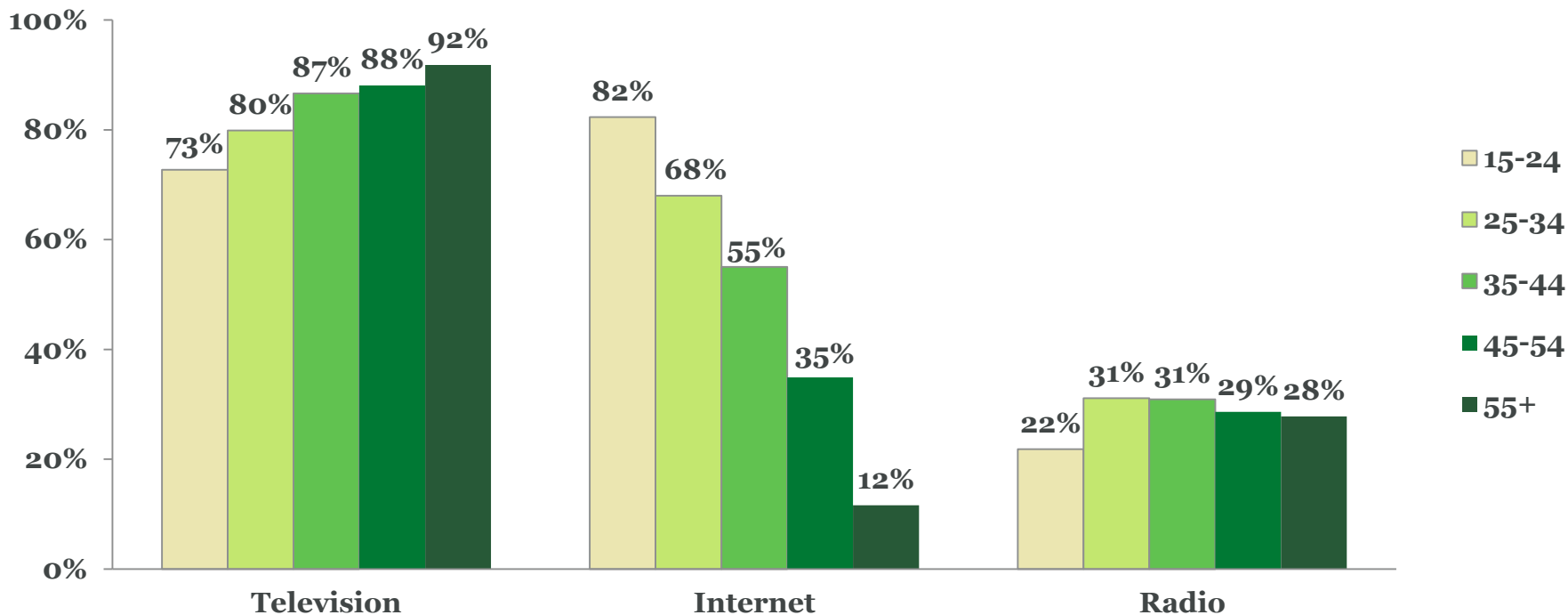
*Bases: all respondents (Nov. 2013 n=5,012; June 2012 n=5,000; Dec. 2010 n=4,633)*



# Age Differences in Daily Media Use – 2013

*Apart from today, when did you last watch/when was the last time you listened/you used...*

**% of those in each age group using medium daily (yesterday)**

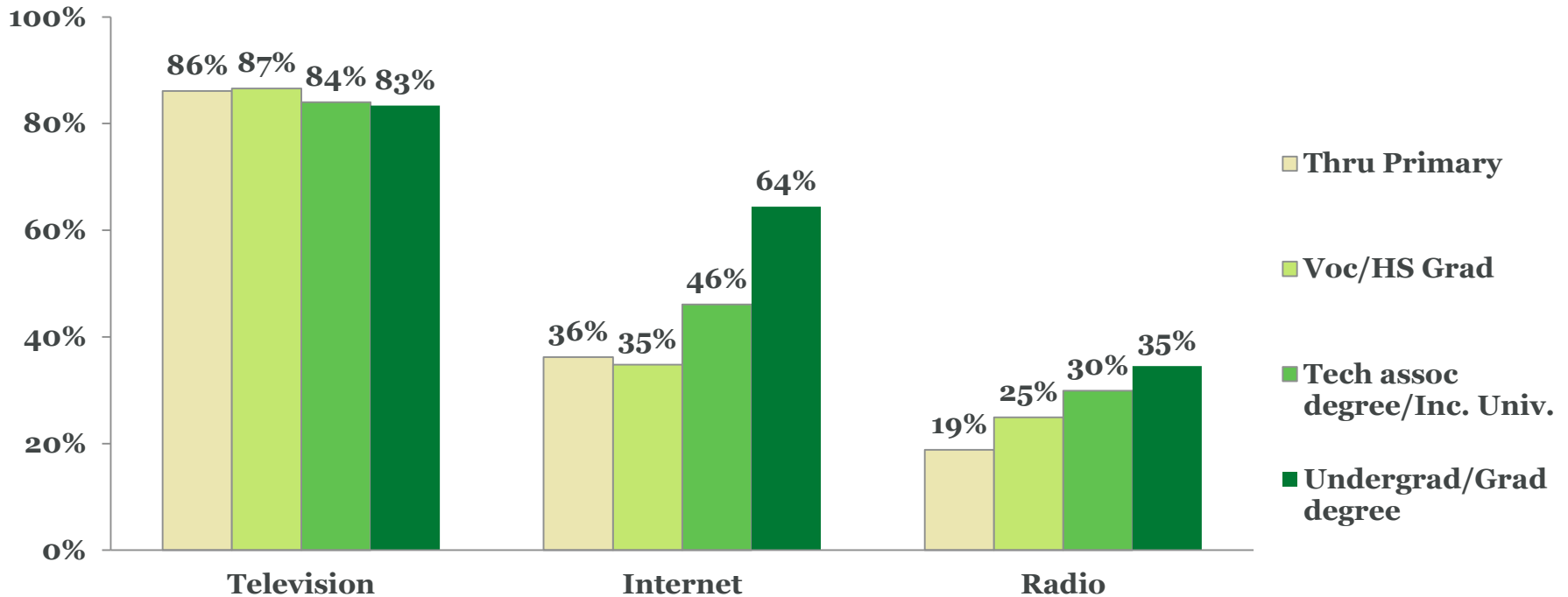


Bases: 15-24 n=704, 25-34 n=917, 35-44 n=823, 45-54 n=836, 55+ n=1,730 (Nov. 2013)

# Education and Daily Media Use – 2013

*Apart from today, when did you last watch/when was the last time you listened/you used...*

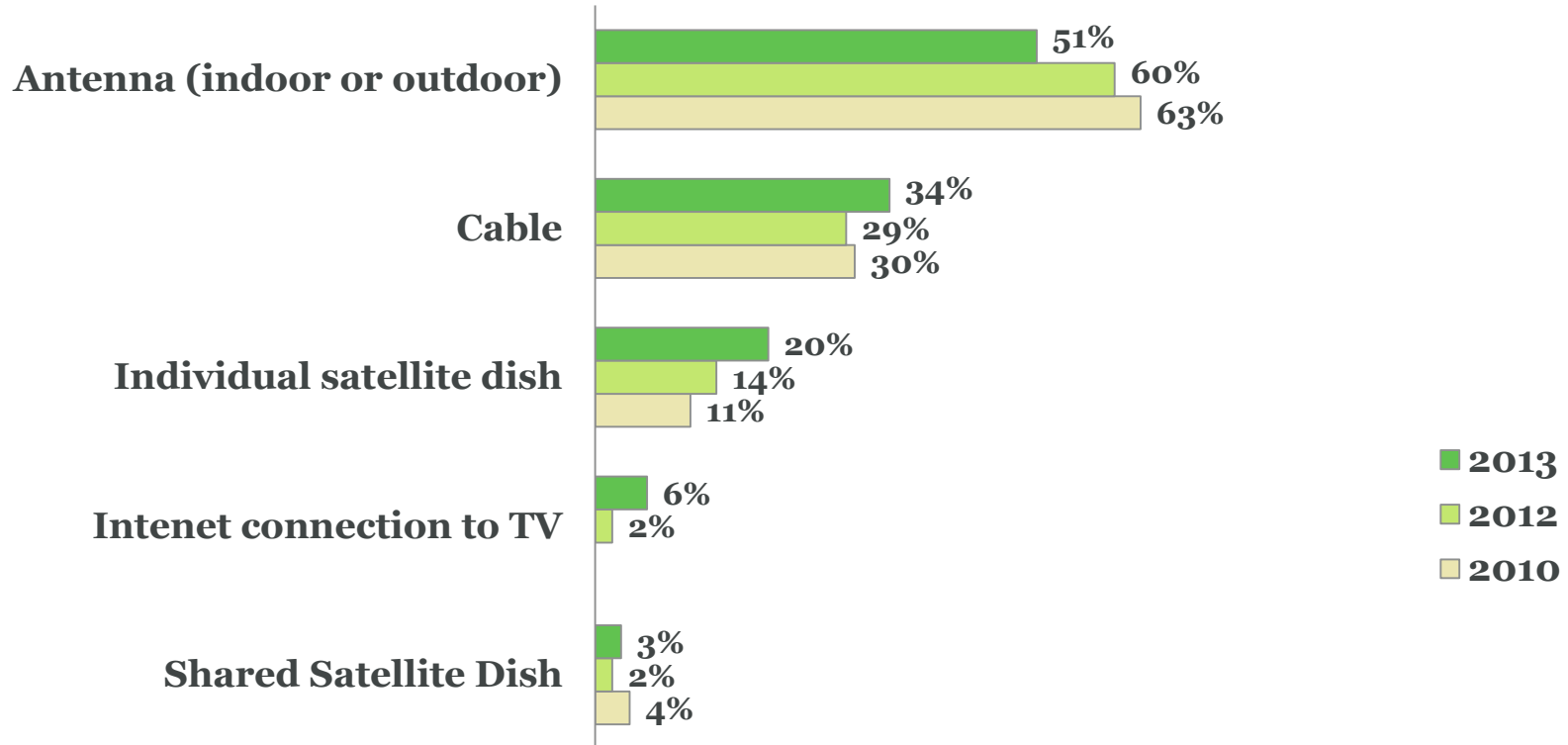
**% of those in each educational group using medium daily (yesterday)**



*Bases: Primary complete or less n=543, Voc/HS Grad n=1,304, Tech assoc. degree/Incomplete higher n=1,840, Undergrad/Grad degree n=1,294 (Nov. 2013)*

# Ways of Receiving TV — 2010-2013

*How does your television receive its signal? With the help of...*



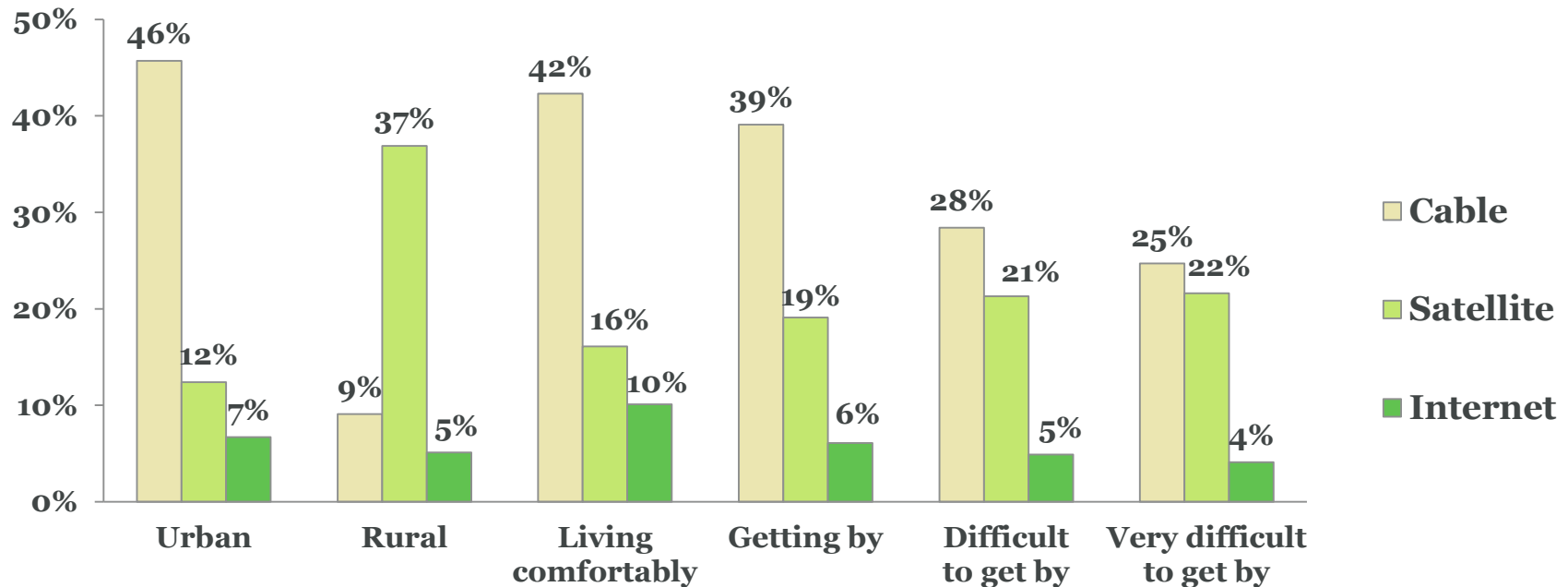
*Bases: all respondents (Nov. 2013 n=5,012; June 2012 n=5,000; Dec. 2010 n=4,633)*

# Use of TV Delivery Means Varies by Urban/Rural Areas, Income – 2013

*How does your television receive its signal? With the help of...*

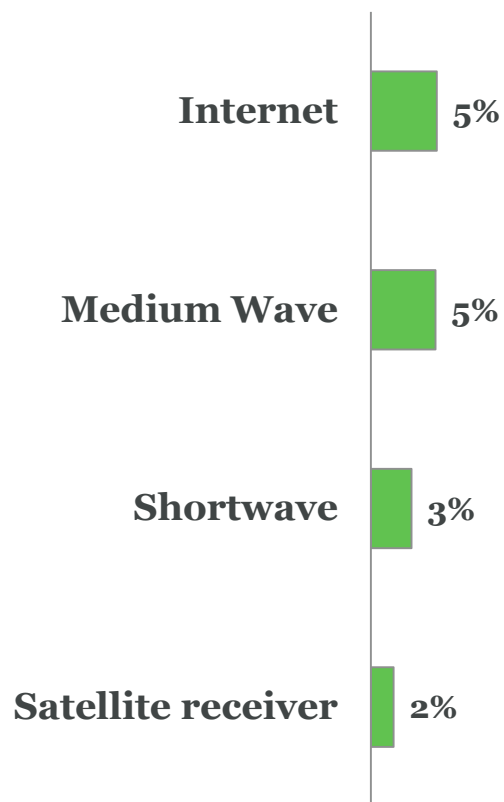
*Which one of these phrases comes closest to your own feelings about your household's income these days?*

**% of those in each group using means of TV reception**



*Bases: Urban n=3,485, Rural n=1,527; "Living comfortably" n=457, "Getting by" n=2,267, "Difficult to get by" n=1,723, "Very difficult to get by" n=330 (Nov. 2013)*

# Ways of Listening to Radio Past-Week — 2013



## **Internet, Satellite receiver:**

*Apart from today, when was the last time you listened to the radio using any of the following methods? [asked of all respondents; “yesterday” + “in the last 7 days” responses shown]*

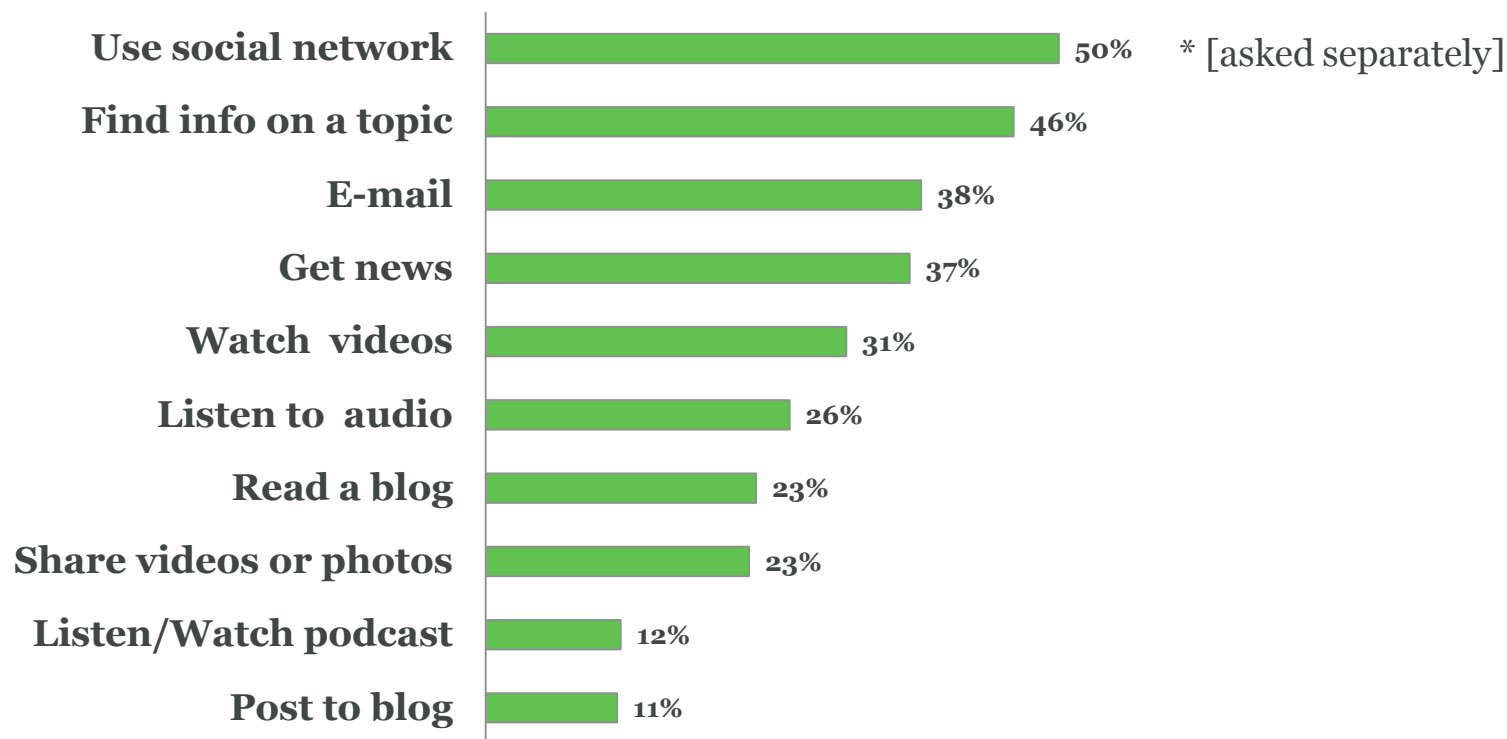
## **Medium wave, short wave:**

*In the last week, have you used any of the following wavebands to listen to the radio at home or elsewhere? [asked of past-week radio listeners]*

*Base: all respondents (Nov. 2013 n=5,012; 2,376 past-week radio listeners)*

# Past-Week Activities Online — 2013

*In the past 7 days, which of the following activities have you used the Internet for? [asked of past-week Internet users]*

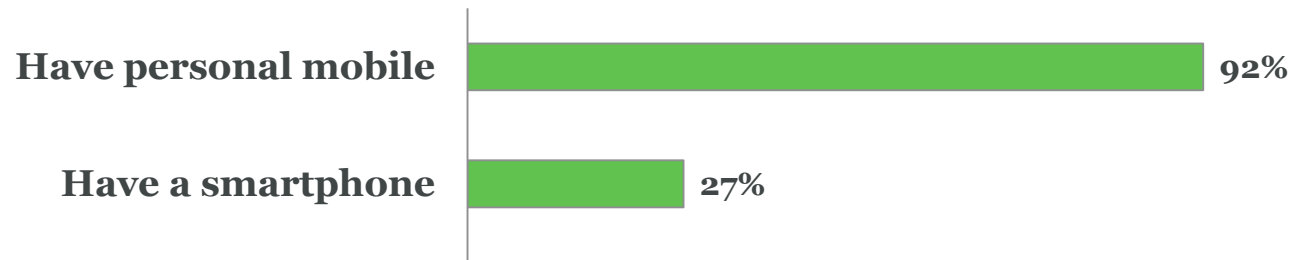


*Bases: all respondents (Nov. 2013 n=5,012; 2,800 past-week Internet users)*

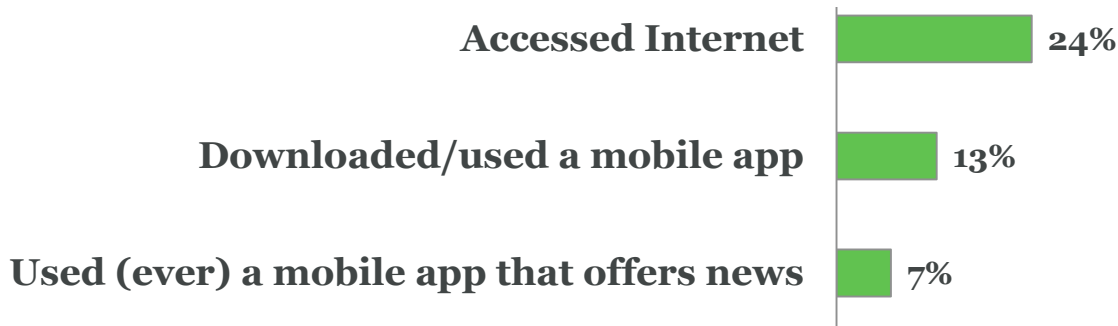
# Mobiles and Their Past-Week Uses - 2013

*Do you, yourself, have a mobile phone, or not? [asked of all respondents]  
Some phones are called “smartphones” because of certain features they have such as the ability to access the Internet or download apps. Is your mobile phone a smartphone?*

**% of all adults**



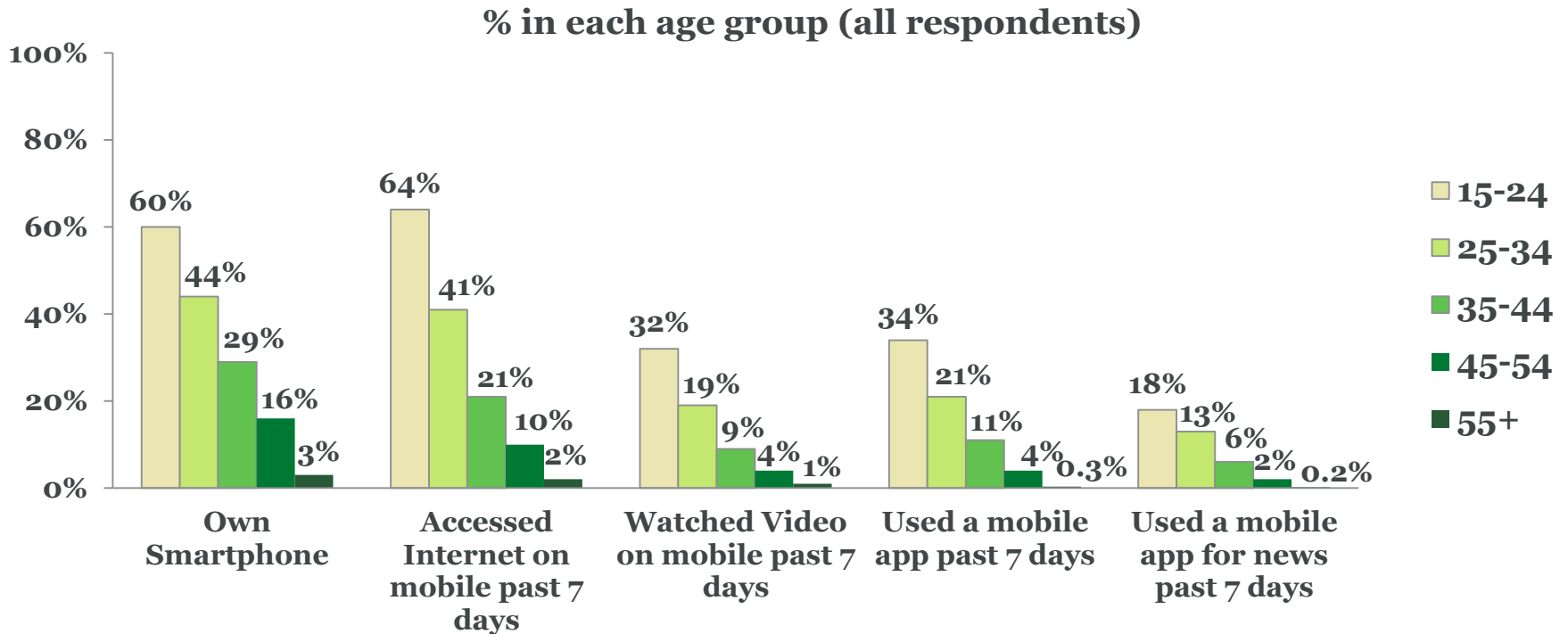
*Which, if any, of the following have you done on a mobile phone in the past 7 days?  
[asked of all mobile owners]*



*Bases: all respondents (Nov. 2013 n=5,012; 4,562 mobile owners)*

# Younger Russians Lead in Smartphone Use – 2013

*Personal mobile phone ownership and uses of mobile in past 7 days  
[see previous slide for question texts]*

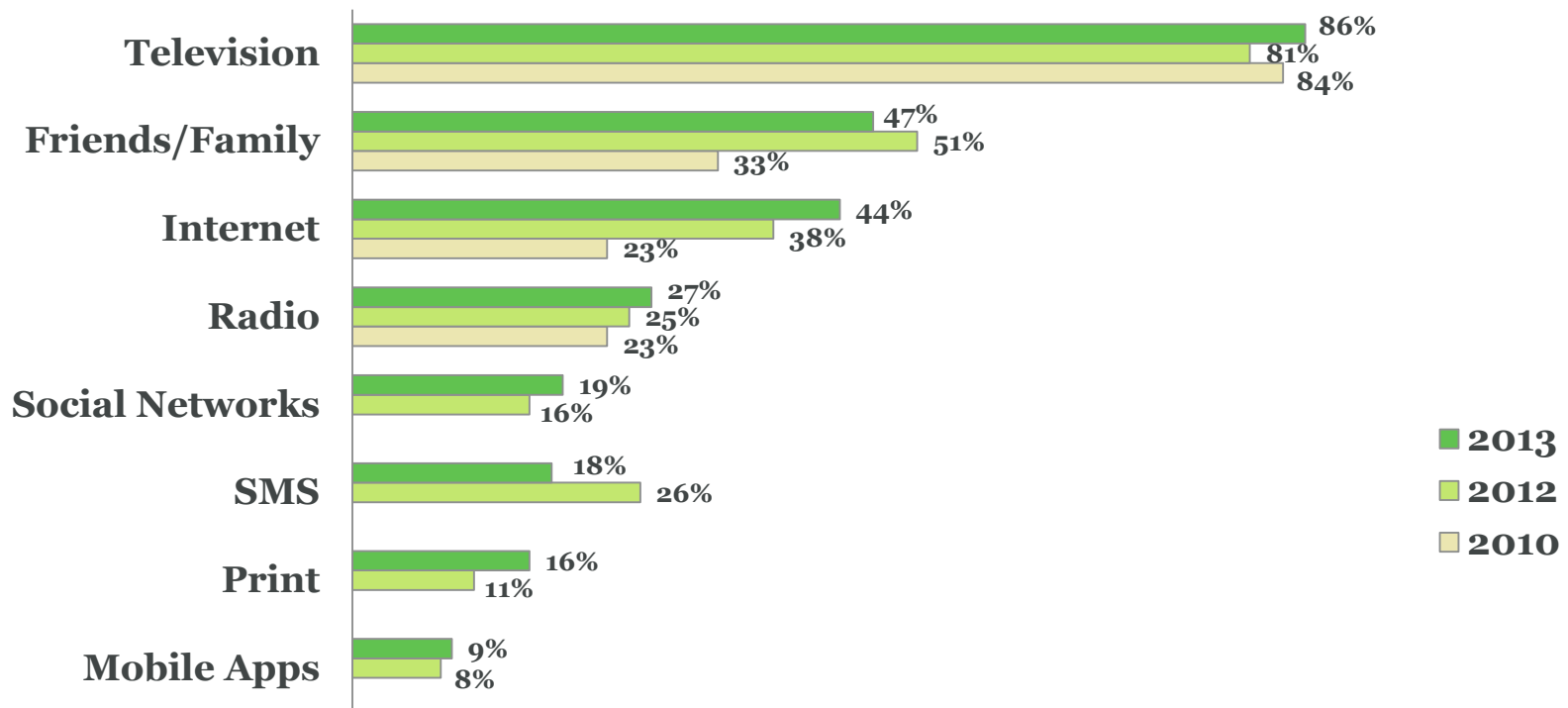


Bases: 15-24 n=704, 25-34 n=917, 35-44 n=823, 45-54 n=836, 55+ n=1,730 (Nov. 2013)



# Daily Use of Media for News 2010-2013

People get news from many different sources. For each one of the sources I mention, please tell me whether you use that source to get news daily or most days per week, at least once a week...

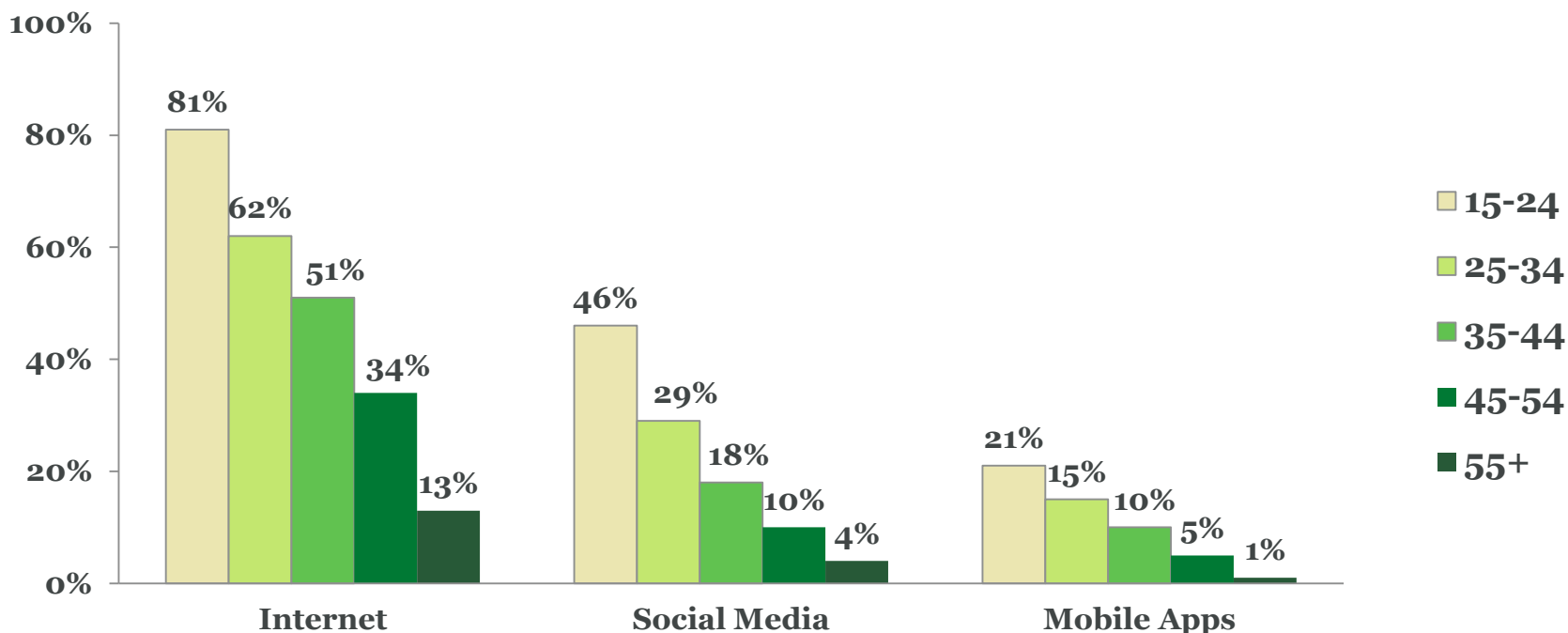


Bases: all respondents (Nov. 2013 n=5,012; June 2012 n=5,000; Dec. 2010 n=4,633)

# Age Key in Daily Digital Media Use for News– 2013

*People get news from many different sources. For each one of the sources I mention, please tell me whether you use that source to get news daily or most days per week, at least once a week...*

**% of those in each age group using medium daily for news**

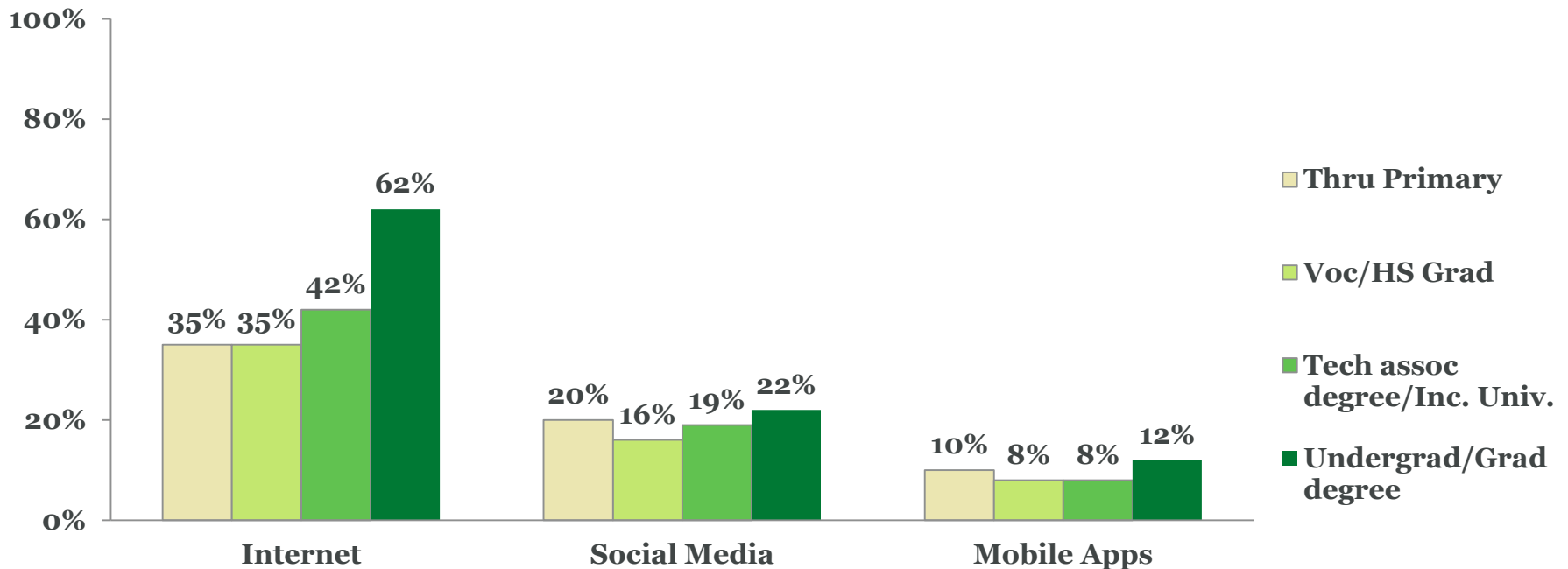


Bases: 15-24 n=704, 25-34 n=917, 35-44 n=823, 45-54 n=836, 55+ n=1,730 (Nov. 2013)

# Daily Use of Social Media/Mobile Apps for News Much More Even Across Educational Levels – 2013

People get news from many different sources. For each one of the sources I mention, please tell me whether you use that source to get news daily or most days per week, at least once a week...

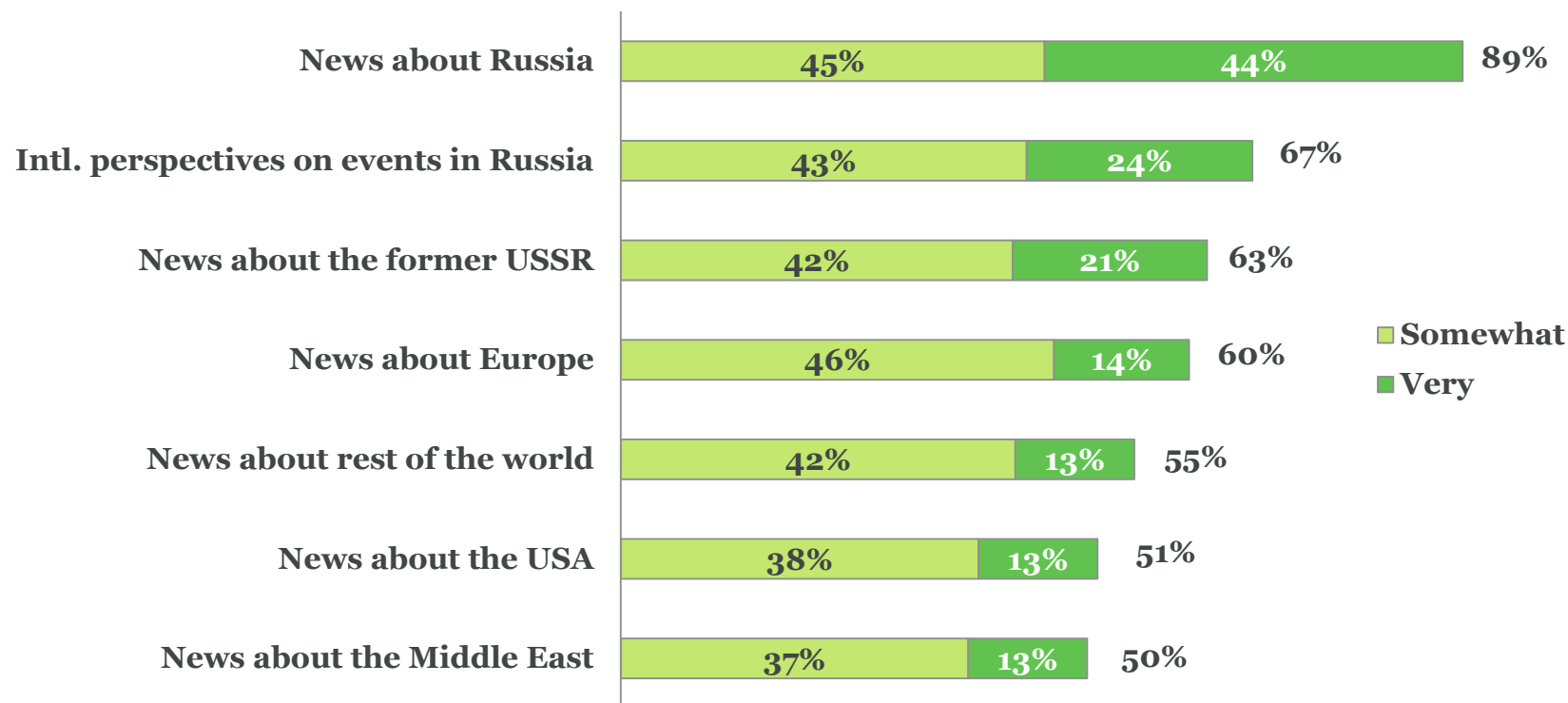
**% of those in each educational group using medium daily**



Bases: Primary complete or less n=543, Voc/HS Grad n=1,304, Tech assoc degree/Incomplete higher n=1,840, Undergrad/Grad degree n=1,294 (Nov. 2013)

# News Topic Interests — 2013

*How interested are you in each of the following types of news? Tell me if you are very interested, somewhat interested, not very interested, or not at all interested.*

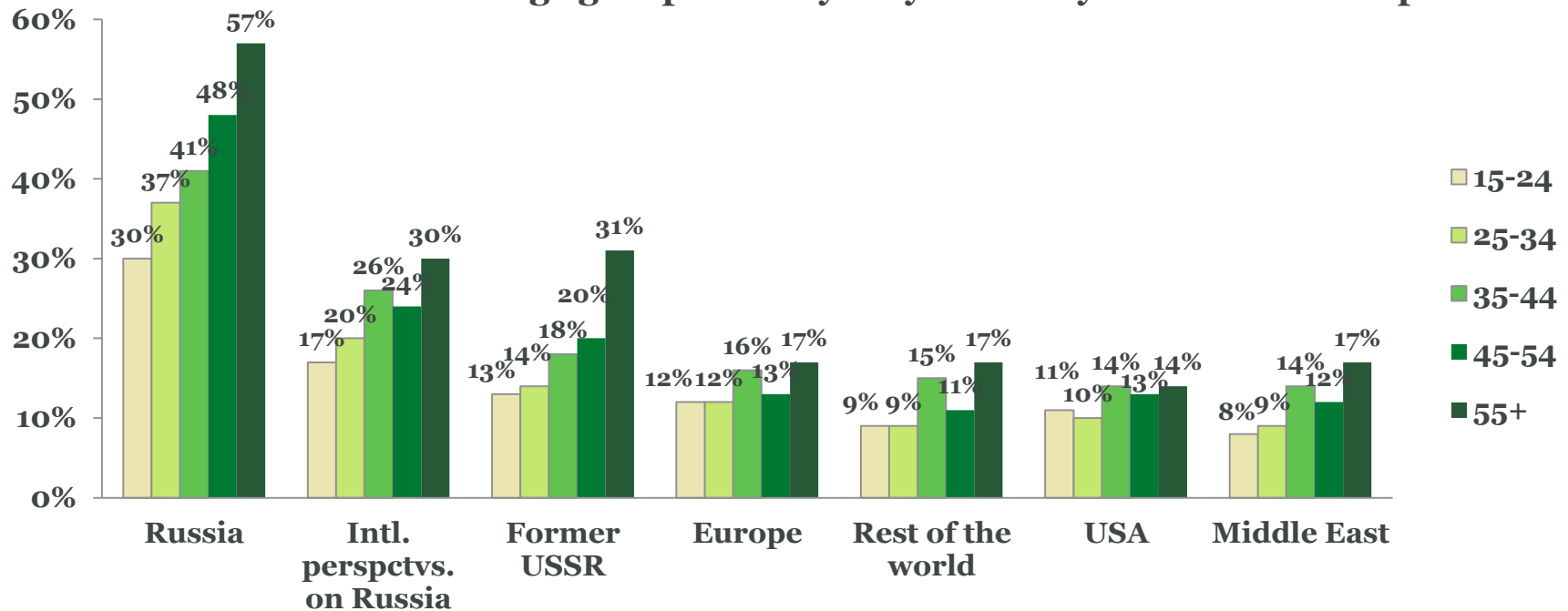


*Bases: all respondents (Nov. 2013 n=5,012)*

# High Interest in News Topics Rises with Age – 2013

*How interested are you in each of the following types of news? Tell me if you are very interested, somewhat interested, not very interested, or not at all interested.*

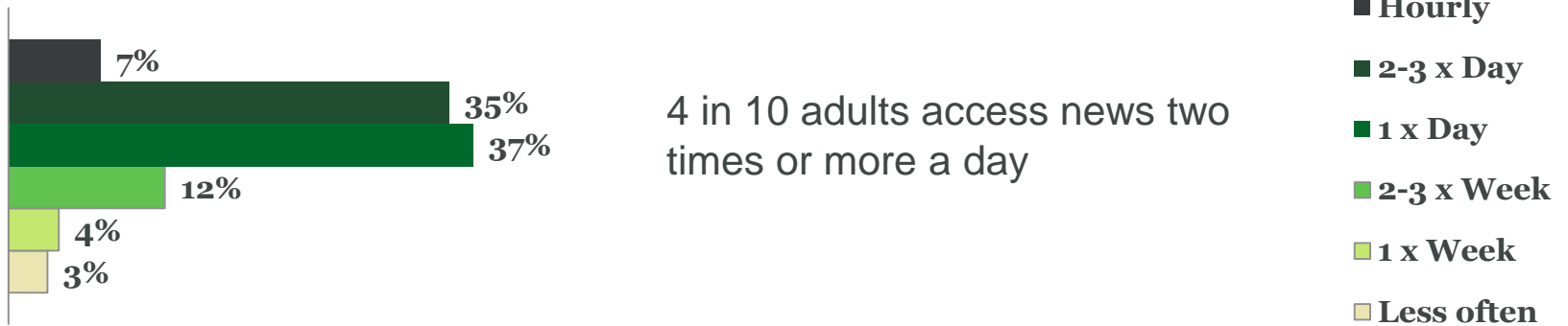
**% in each age group who say they are “very interested” in topic**



Bases: 15-24 n=704, 25-34 n=917, 35-44 n=823, 45-54 n=836, 55+ n=1,730 (Nov. 2013)

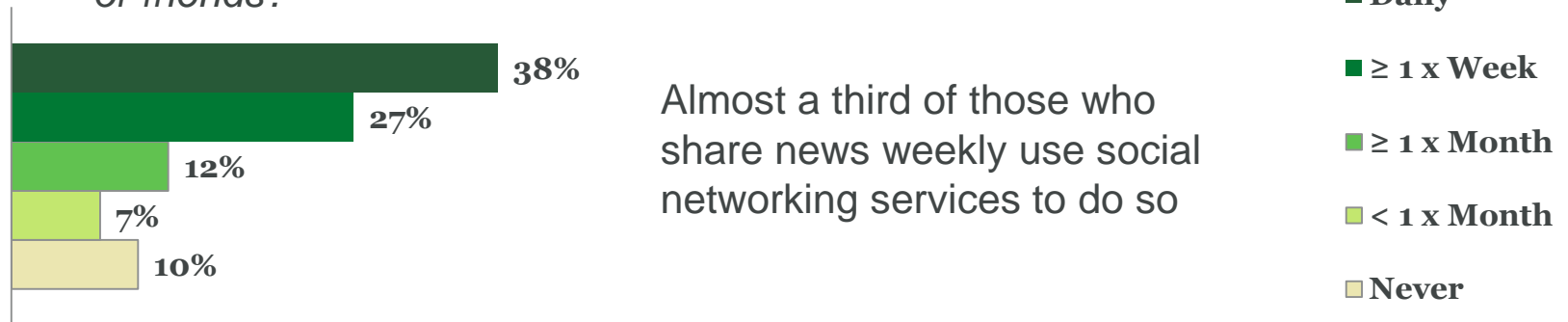
# Accessing and Sharing News — 2013

*In general, how often do you access any type of news?*



4 in 10 adults access news two times or more a day

*How often do you discuss or share news with family, other relatives, or friends?*

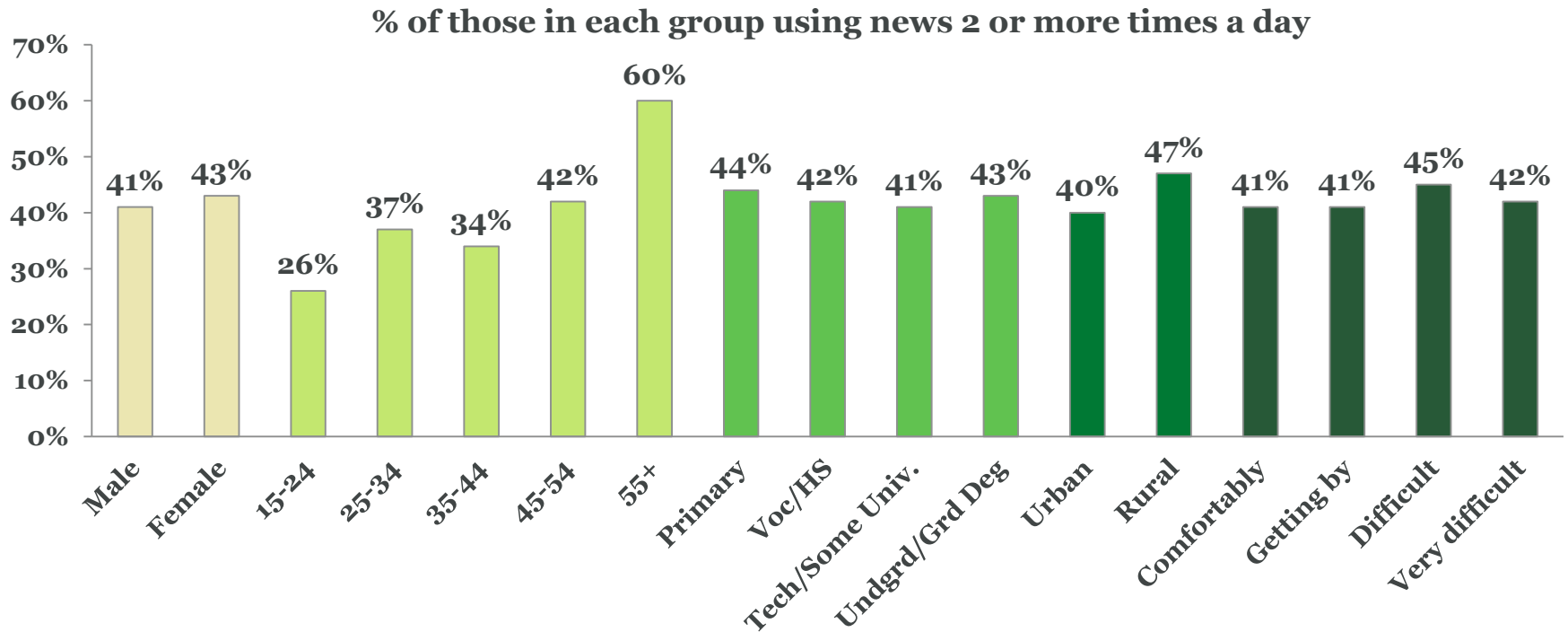


Almost a third of those who share news weekly use social networking services to do so

Bases: all respondents (Nov. 2013 n=5,012)

# More-than-Daily News Habit Is Similar Across All Demographics But Youngest/Oldest—2013

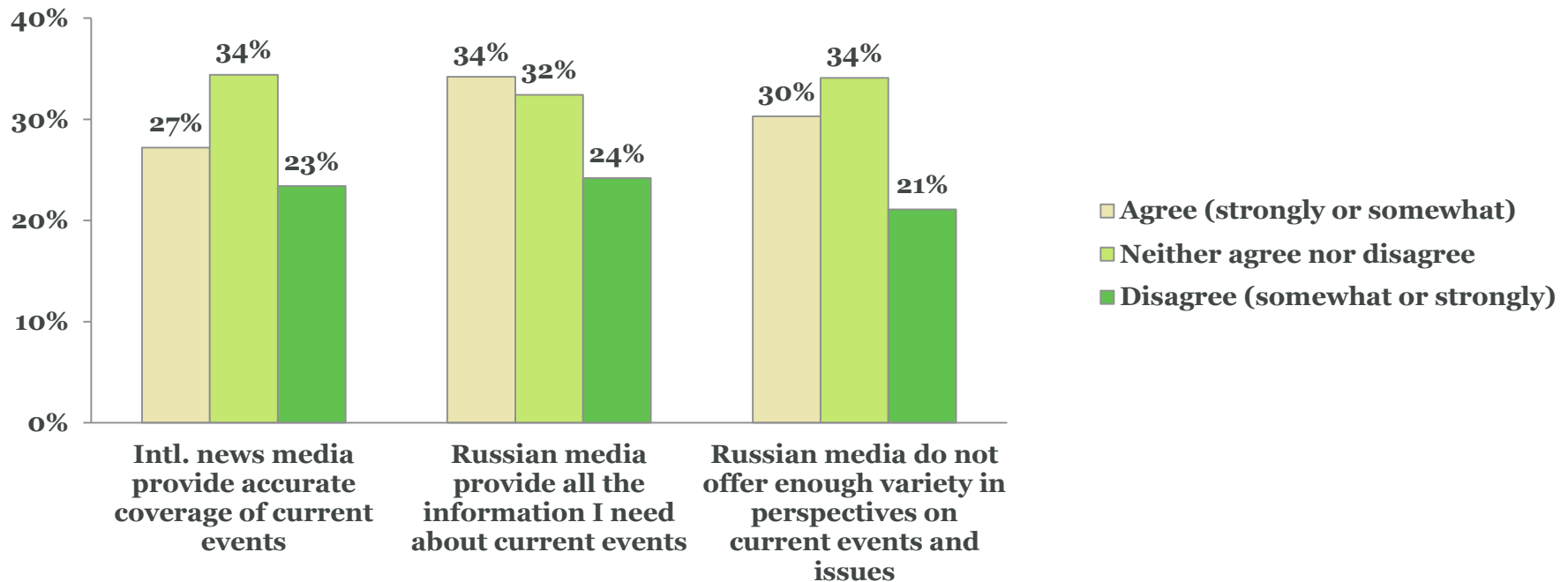
*In general, how often do you access any type of news? By type, I mean news on radio, TV, Internet, newspapers, etc.*



Bases: Males n=1,838, Females n=3,174; 15-24 n=704, 25-34 n=917, 35-44 n=823, 45-54 n=836, 55+ n=1,730; Primary complete or less n=543, Voc/HS Grad n=1,304, Tech assoc degree/Incomplete higher n=1,840, Undergrad/Grad degree n=1,294; Urban n=3,485, Rural n=1,527; "Living comfortably" n=457, "Getting by" n=2,267, "Difficult to get by" n=1,723, "Very difficult to get by" n=330 (Nov. 2013)

# Views of Russian and International News Media

Now I will read you some general statements. Please tell me whether you agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, or disagree strongly with each statement.



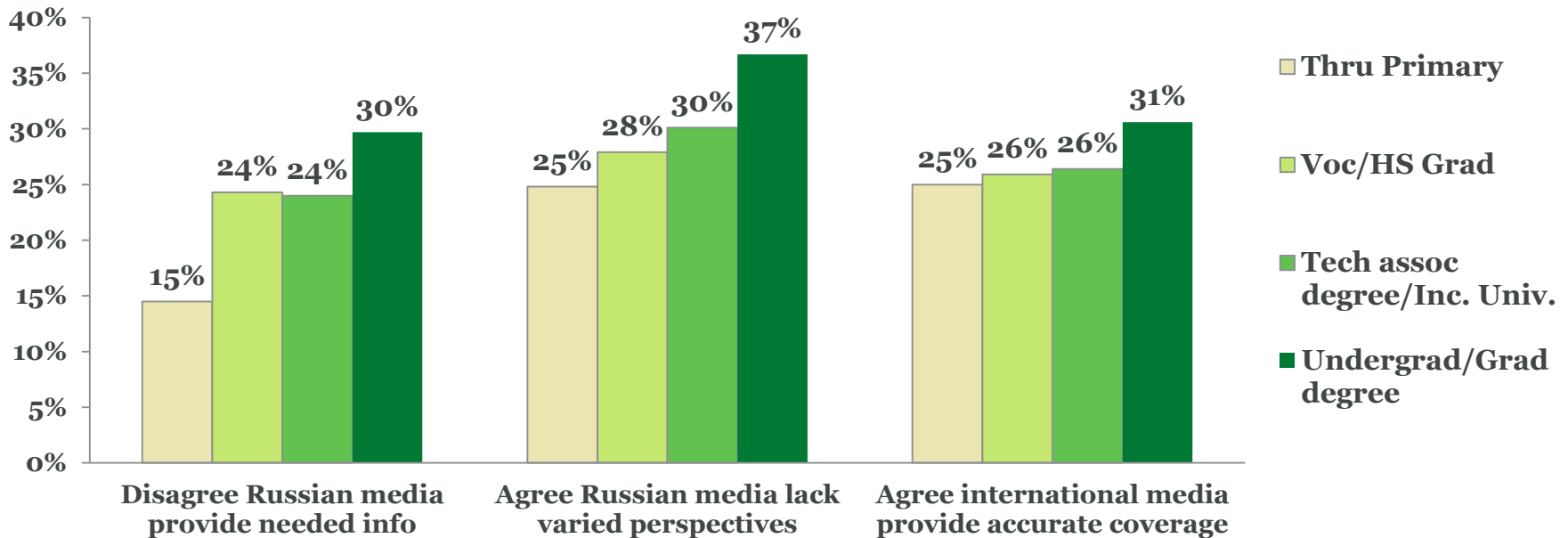
Bases: all respondents (Nov. 2013 n=5,012)



# Better-Educated Have More Negative Views of Russian Media, Positive of International Media – 2013

*Now I will read you some general statements. Please tell me whether you agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, or disagree strongly with each statement.*

**% of those in each educational group giving response**



*Bases: Primary complete or less n=543, Voc/HS Grad n=1,304, Tech assoc degree/Incomplete higher n=1,840, Undergrad/Grad degree n=1,294 (Nov. 2013)*

# Competing Effectively in a Crowded Media Space: 2013 RFE/RL Research in Russia

# BBG 2013 Research

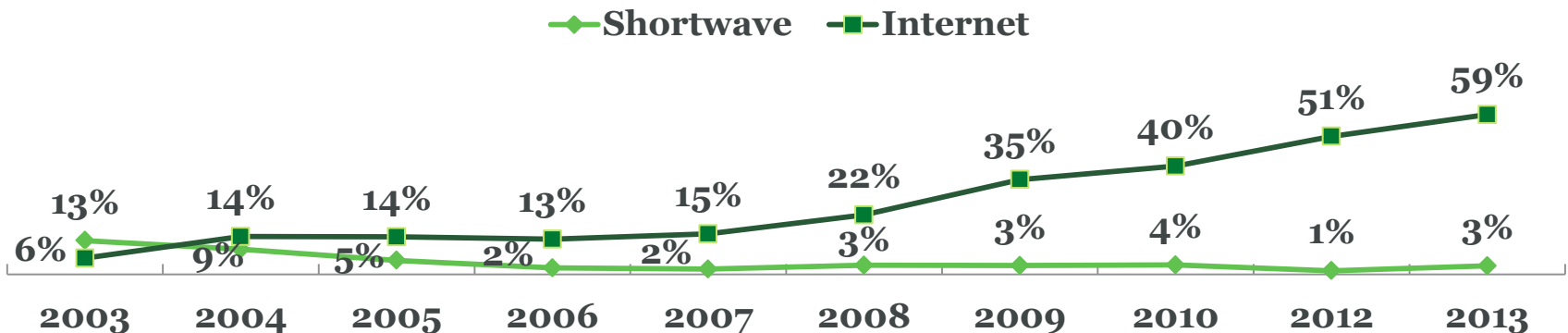
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- BBG Nationwide survey of 5,012 respondents
- Focus groups among Internet-savvy news gatherers
- Focus groups with new media professionals
- In-depth interviews with new media experts

# Platform: Focus on the Web

- With limited platforms available to non-state media in Russia, it makes sense to focus on the Internet
  - Almost 3 in 5 go online weekly and 56% go online weekly for news
  - Shortwave use is under 5% weekly and fallen in the last decade
- News seekers are increasingly Internet savvy and expect on-demand, personalized news

Weekly use of shortwave and Internet 2003-2013



# Topics: What a News Source Can Add

- A unique news source can focus on issues not fully covered by other sources:
  - Human rights, environment, corruption
  - Unique analysis, well-known analysts
  - Outside views on Russia and Russian events

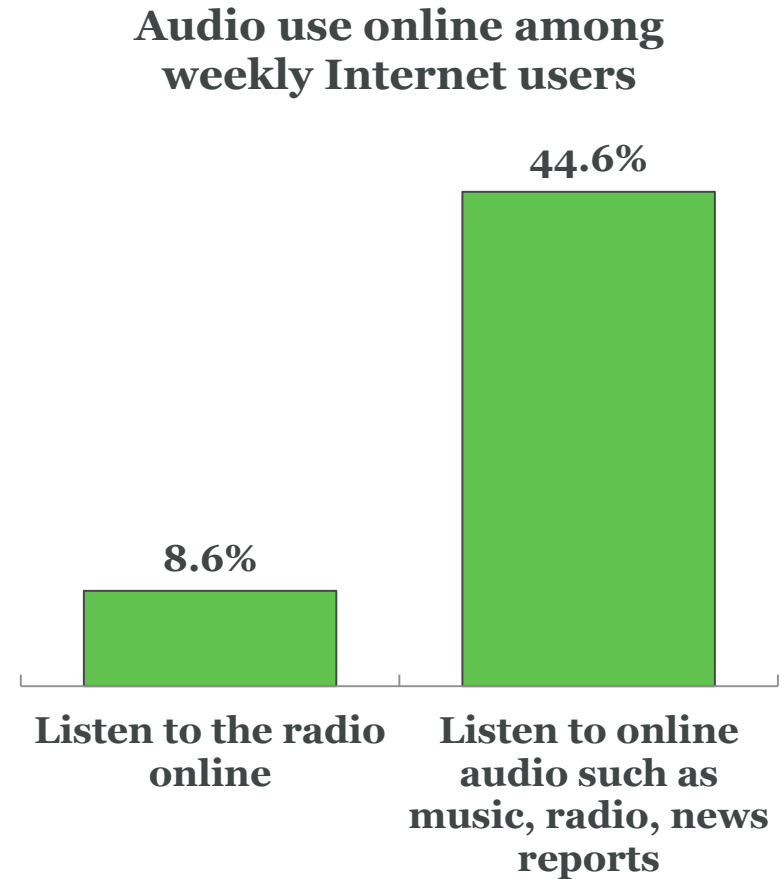
*People understand that there are things that can't be talked about. [Media] should talk about these things.  
(New media professional)*

*They should do something like unique analysis... It is better to have one person, someone fairly well-known, who can write a medium-length text that covers events plus speculates further on them.  
(New media professional)*



# Multimedia: Using Radio Expertise with Online Format

- Traditional multimedia experience must be translated to how Internet is used for audio
  - Nearly half of regular Internet users listen to audio weekly, fewer than one in ten listen to radio
- Internet users are used to different kinds of audio, not just radio programming
  - Upcoming research will help determine which audio format is best for users



# Niche: Objectivity in a Polarized Media Environment???

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- Some media experts noted a polarization in the current media environment
  - *“Real quality journalism has basically disappeared in the country all together... Instead, we have polarization where people, in order to be heard, begin to yell louder and louder because they feel that they are not being heard. This is an illusion but it is felt nevertheless. They talk more and more about basic things that are less and less true and further from each other. So there is a split.”*
- Can a news source stand out by being an objective source of news and analysis?
  - Can international media overcome Cold War stereotypes or the image of being anti-government?

# Unresolved Questions

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- How to increase awareness in an environment where brand and brand loyalty are losing their importance
  - *“Before, a person came to a brand -- to Radio Svoboda, to Lenta.ru or to somewhere else. People still go to Lenta.ru, probably, but all the other sources are now just not as important and not recognizable because a person just sees a link in their newsfeed or on Facebook. He clicks on it, goes to a page and doesn’t look any further.”* (Expert Interview)
- Shaking of Cold War-era image and assumptions about US international media
- Finding and maintaining a niche in an overcrowded landscape





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## Upcoming BBG Research Series events:

– Thursday, March 13: Egypt

Learn more about the BBG Research series at <http://j.mp/UjCmJb>

Have a question? Contact us at 202-203-4400 or [publicaffairs@bbg.gov](mailto:publicaffairs@bbg.gov)