



Crossmedia Landscape Report 2017

Uncover media and marketing potential based on
GfK Crossmedia Panel Panels



Content of GfK Crossmedia Landscape Report

Key areas to be explored



1

Digital Crossmedia Usage

This chapter explores the usage of PCs and mobile devices. This includes the overlaps between devices, top activities and apps, and the device usage in the course of the day.

2

TV Viewership and Digital Streaming

In this chapter you will gain insights into the consumption of video content. It explores the online and offline viewership of TV channels and the consumption of digital streaming offerings.

3

Usage of Social Media

In this part of the report, we inform you about the top social media platforms and the devices which are used to access them. Furthermore, the profiles of social media users are explored.

4

Industry Chapter: E-Commerce

This chapter explores the country's top e-commerce offerings and evaluates their usage based on several KPIs. Additionally, the usage of e-commerce offerings by millennials is shown.

GfK Crossmedia Landscape Report

Summary



The majority of the Russians people are online, either per PC, smartphone or tablet.

Most Russian users (32%) are using the PC and smartphones to access the internet.

Smartphones are most likely to be used during the morning hours, whereas devices with bigger screens, PCs and tablets, are more likely to be used after work at home.

1

Video Streaming: The PC is by far the leading device for video streaming usage. With YouTube as, in terms of reach, the most popular streaming brand.

2

Social Media: In Russia VK.com is the leading social media platform followed by Odnoklassniki.ru. Overall, social media is primarily used per smartphone & via apps.

3

E-Commerce: AliExpress is the leading e-commerce product in Russia, with the most loyal and engaged users.



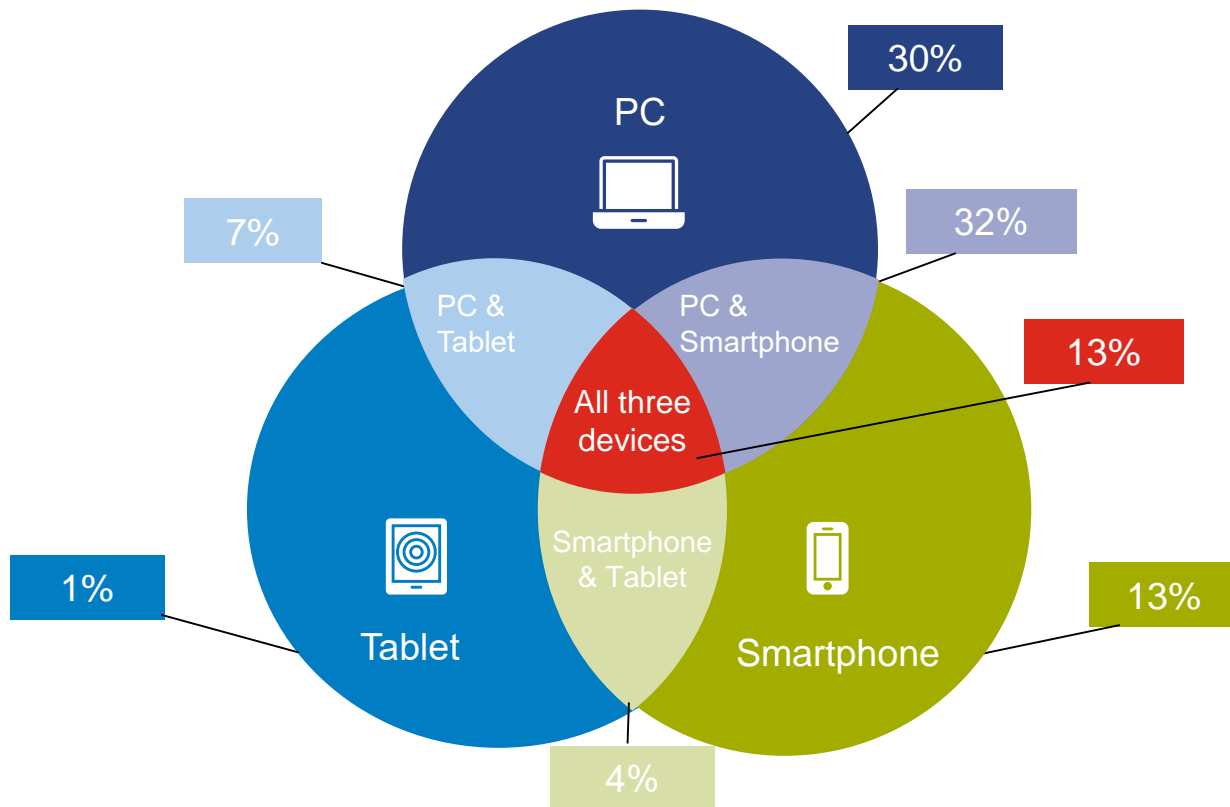
1

Digital Crossmedia Usage

Device Usage Overview

Digital device usage and all device combinations

Most users in Russia access the internet with two devices, PC and smartphone.



- Most users use a combination of PC and smartphone, followed by PC only users.
- 13% use all three devices: PC, smartphone and tablet.
- Only 1% of people use tablet only.

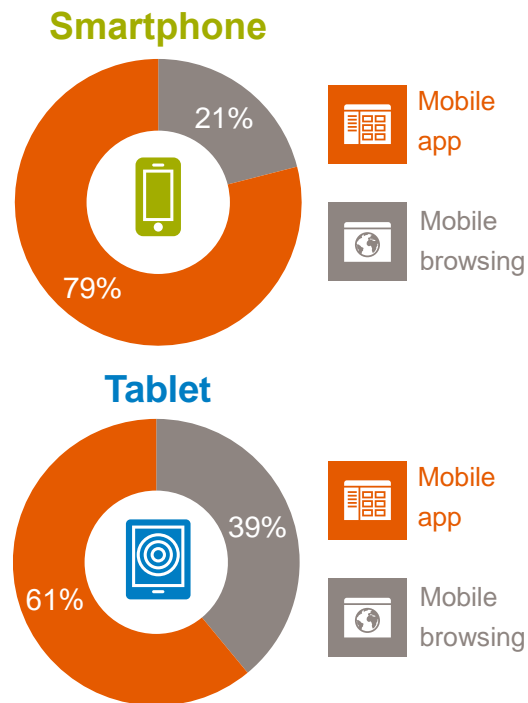
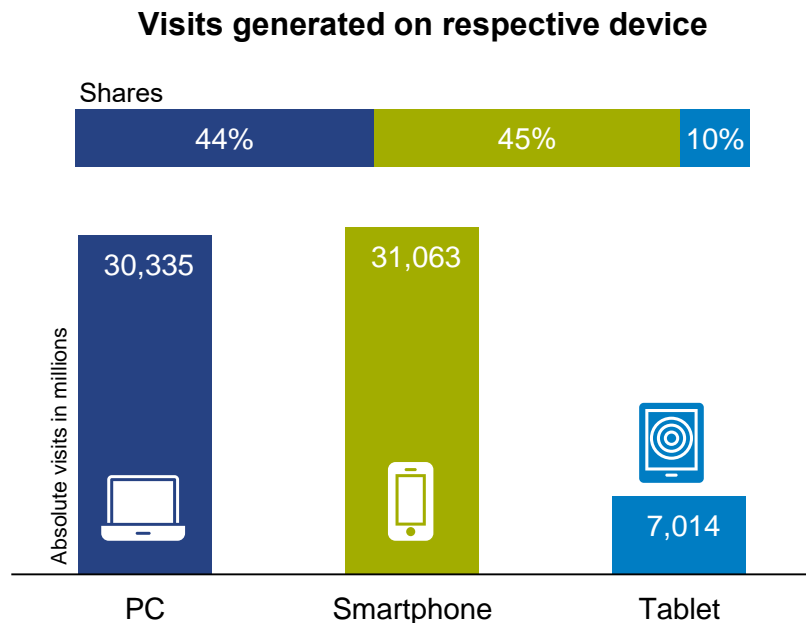
Source: GfK Crossmedia Panel Russia | March 2017, Online Population 14+ | Base: Online population, users of any device in time slot divided by all the time slots

Internet usage per device based on **visits**

The Smartphone is the leading device for internet visits in Russia.



Based on absolute visits, the smartphone is the leading device within the Russian online population, but closely followed by the PC. Smartphones and tablets are used predominantly for app usage, tablet shows also a strong browsing usage (39%).

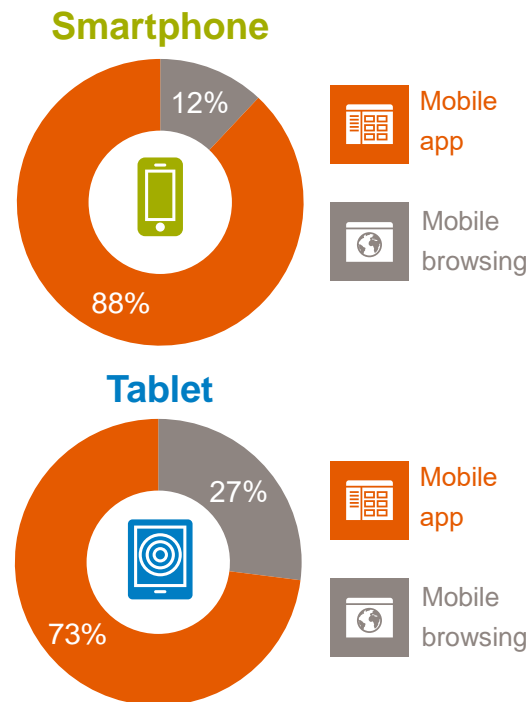
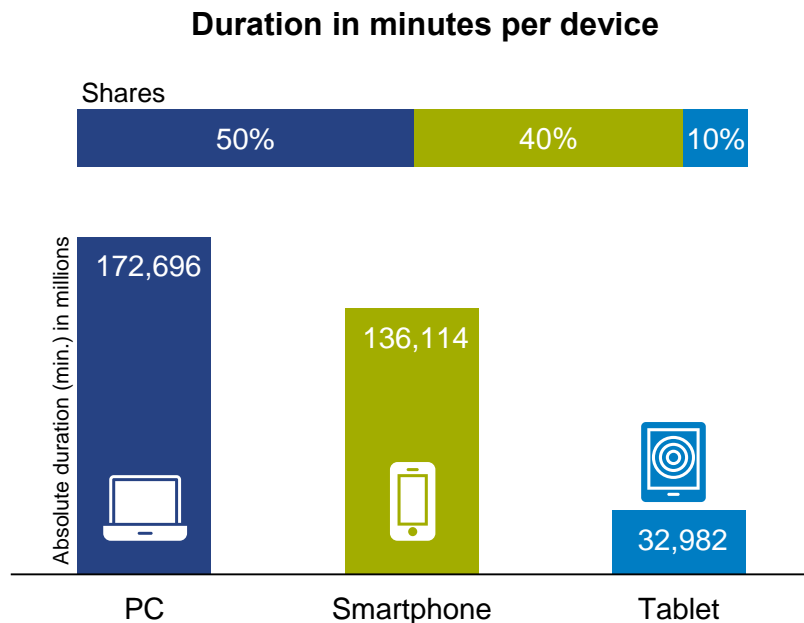


Internet usage per device based on **duration**

50% of the internet usage duration in Russia happens on the PC.



Based on the share of duration usage, the PC is the leading device within the Russian online population. In total 172.696.060.099 minutes were spend on the PC on the internet in March 2017. Smartphones and tablets are used predominantly for app usage.



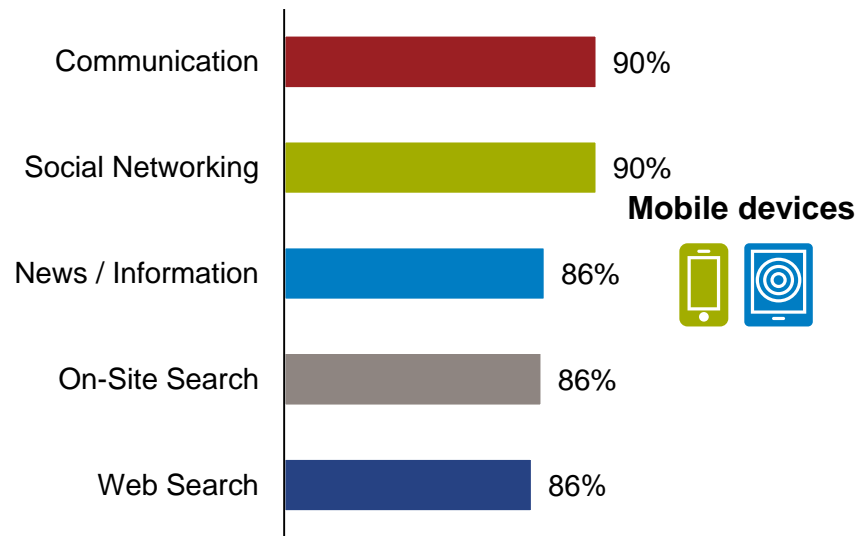
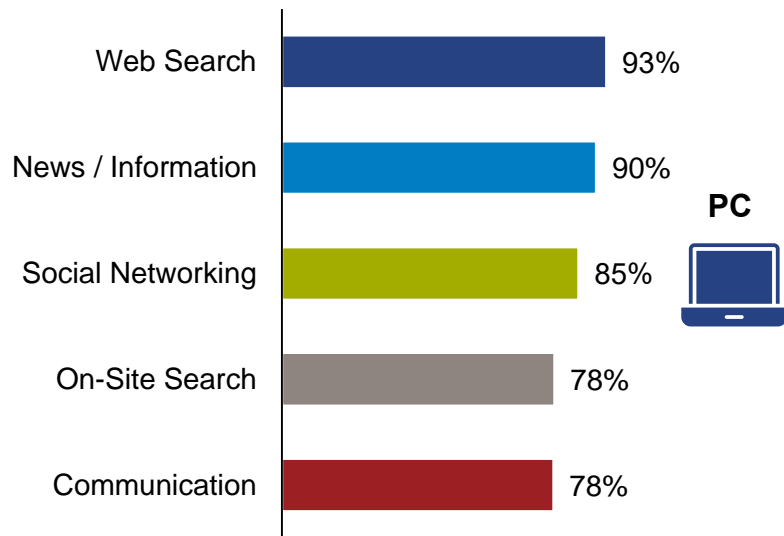
Top 5 Online Activities

Top 5 activities based on **net reach**

Web search has the highest reach on the PC, while on mobile it is shopping.



The activity web search has the highest reach on the PC, followed by news/information. On mobile devices on the other hand communication and social networking has the highest reach.

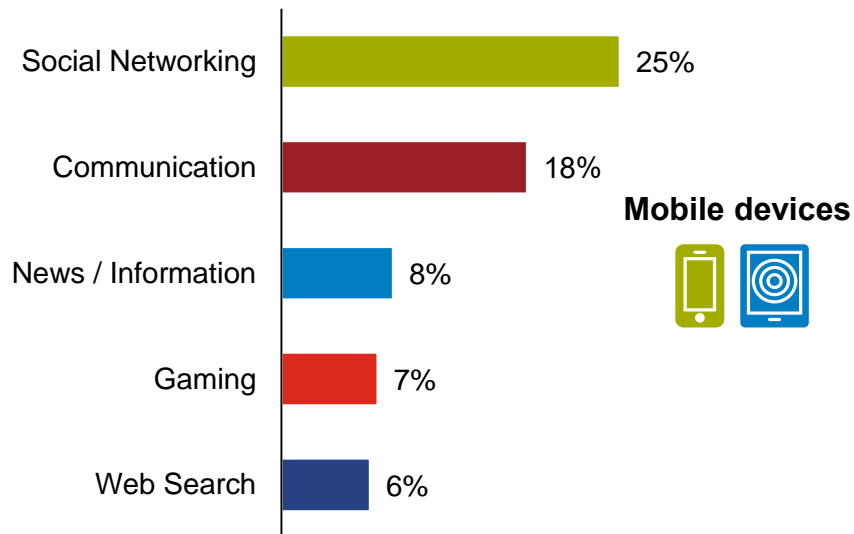
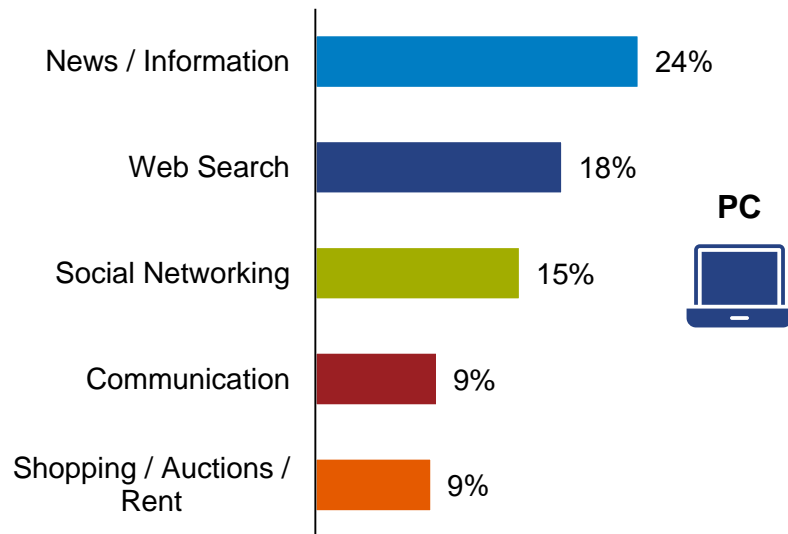


Top 5 activities based on **visits**

In terms of visits the mobile device usage is characterized by social networking.



Based on visits, the category news/information holds the highest share on the PC, while on mobile devices it is held by social networking, followed by communication.

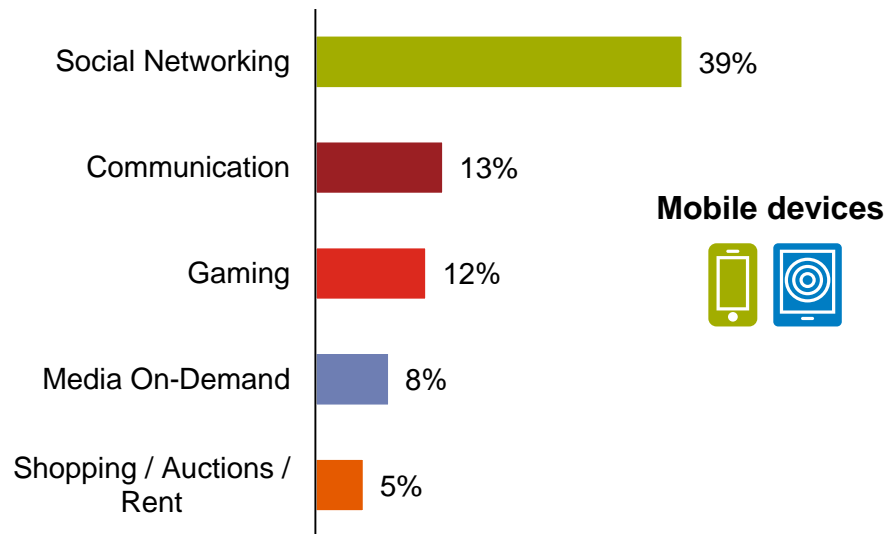
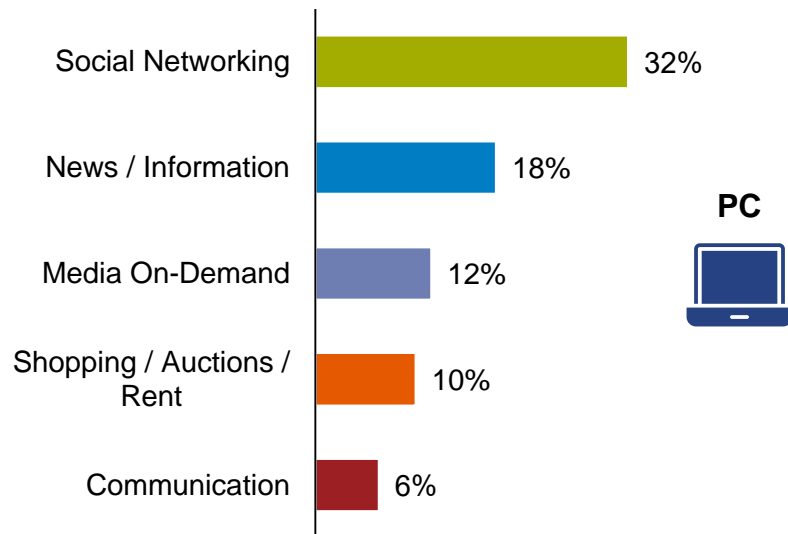


Top 5 activities based on **duration**

Most time on mobile devices is spent on social networking, the same goes for PC.



Based on duration, the highest share on the PC and mobile devices is held by social networking. While on the PC it is followed by news / information, on mobile devices it is followed by communication.

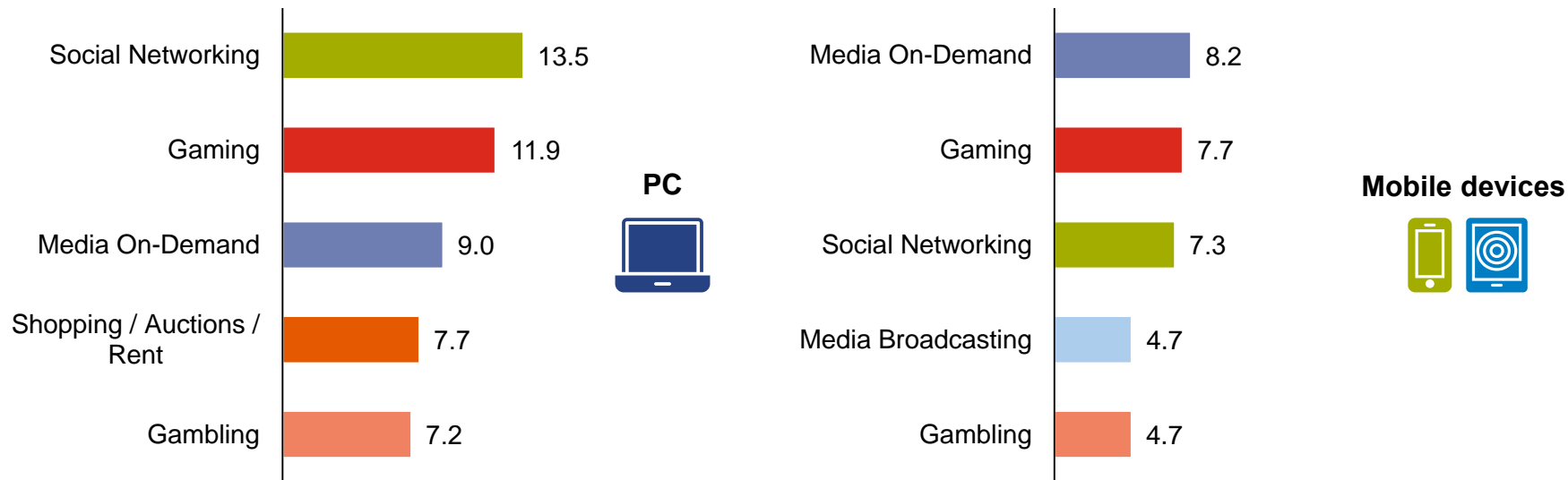


Top 5 activities based on **average time per visit**

The most time spent per visit is on the PC on social networking and gaming.



Based on the average time per visit, the most visited category on the PC is social networking. On mobile devices media on-demand (8,2 mins on average per visit) and gaming (7,7 mins on average per visit) have the highest average time per visit.



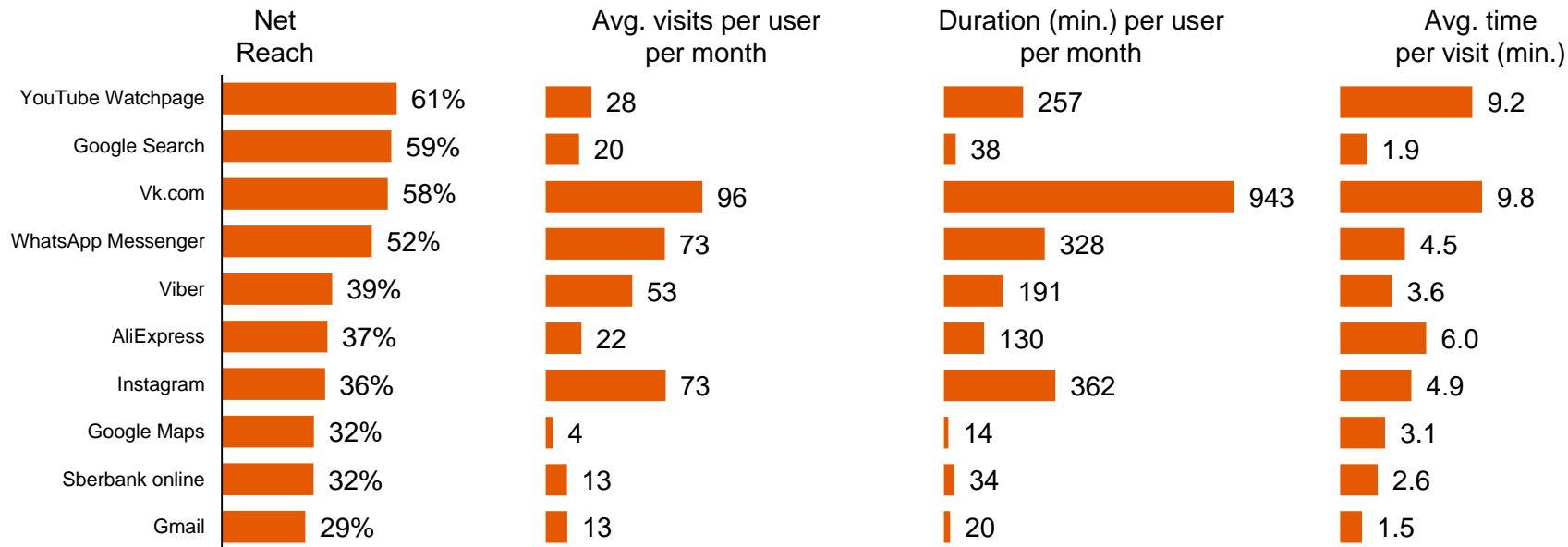
Top 10 Apps

Top 10 apps on mobile devices

YouTube with the highest reach, Vk.com has by far the highest duration.



YouTube Watchpage has the highest reach in Russia. Vk.com generates the highest duration and unique visits per user per month. The avg. time per visit is highest for Vk.com (nearly 10 mins.)





2

TV Viewership and Digital Streaming

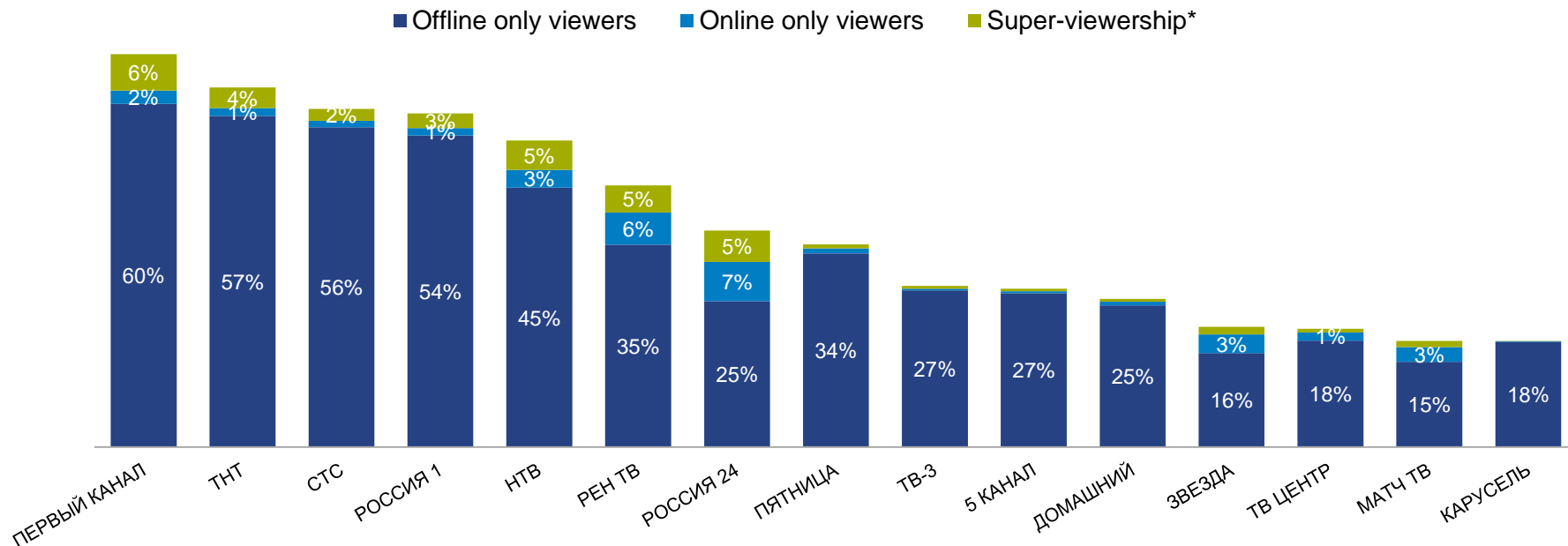
Online and Offline Viewership of TV programs

Online and offline viewership of TV programs

With a reach of 68% **Первый Канал** is the leading TV channel in Russia.



Первый Канал, as the leading TV channel, has the highest overall reach (68%) of which 6% are due to super-viewership*. Первый Канал also reaches the highest offline viewership (60%) whereas Россия 24 has the highest online viewership (7%).



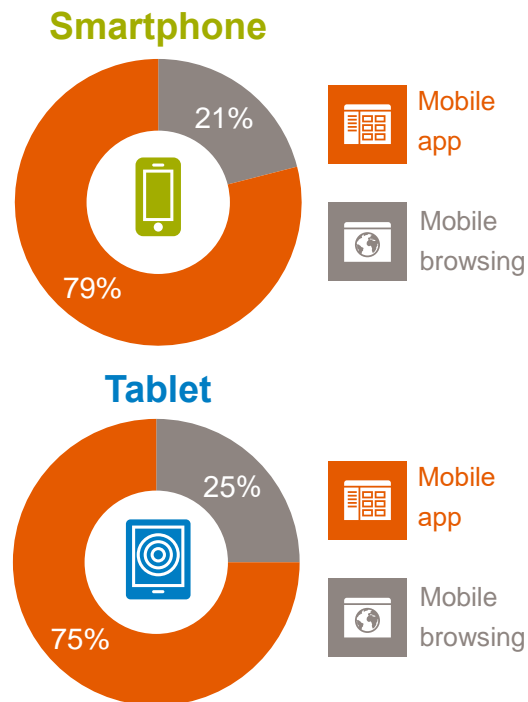
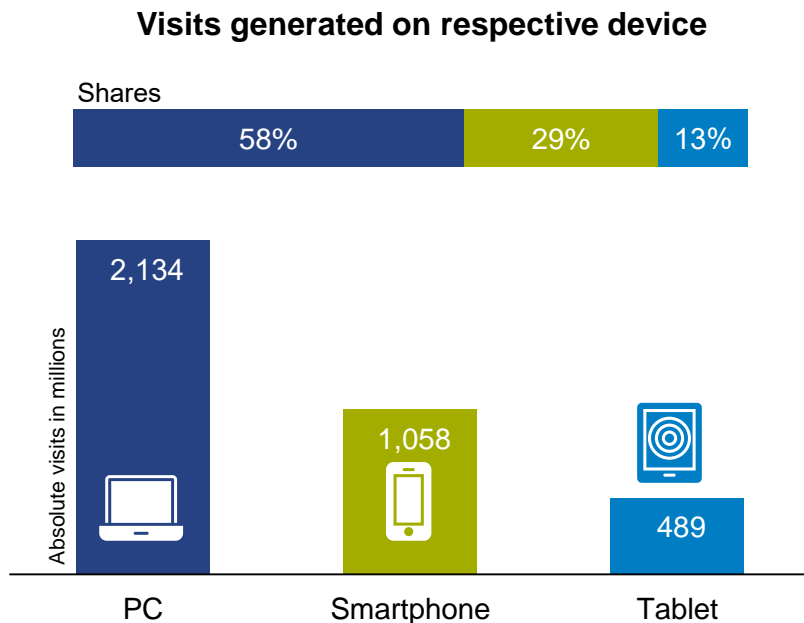
Video Streaming

Streaming usage per device based on visits

With 58% share of visits the PC is the leading device for streaming in Russia.



Based on visits, PC is the leading device used for streaming within the Russian online population. Smartphones and tablets are used predominantly for mobile app streaming.

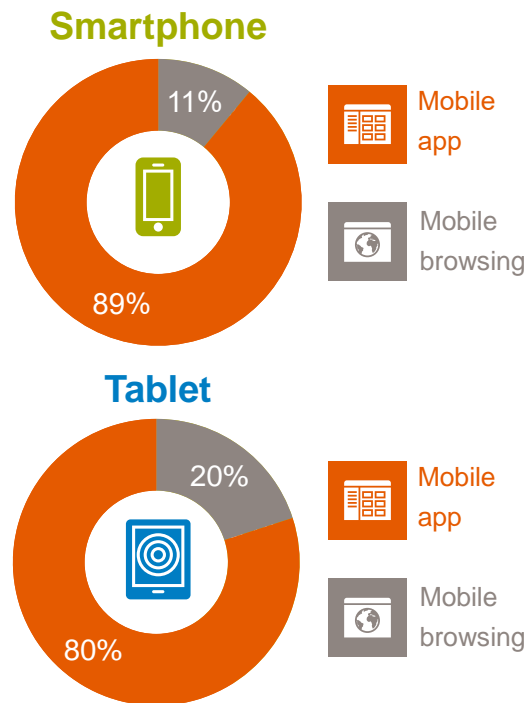
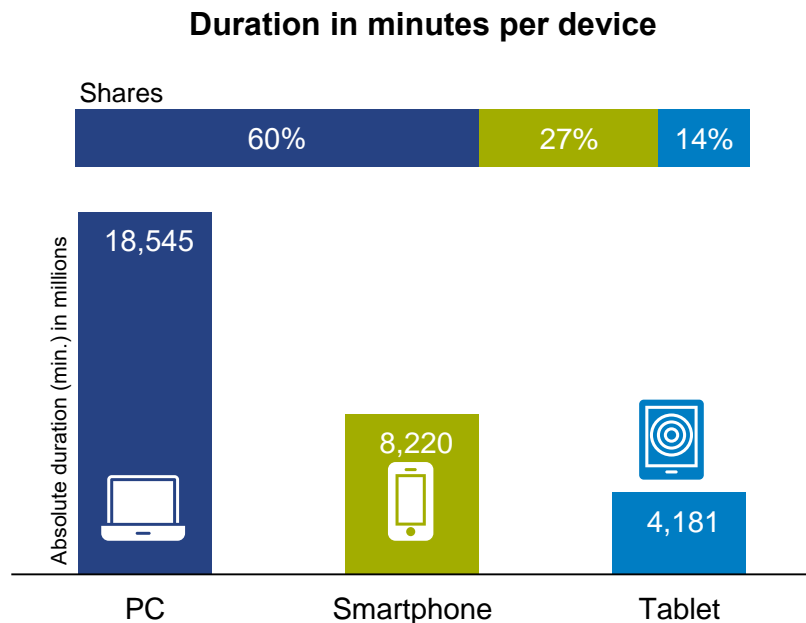


Streaming usage per device based on **duration**

Russian users spent more streaming time on the PC than on mobile devices.



Based on duration, the PC is the leading device used for streaming within the Russian online population. 18.544.630.398 minutes in total are generated on the PC in March 2017 for video streaming. Smartphones and tablets are used predominantly for mobile app streaming.





3

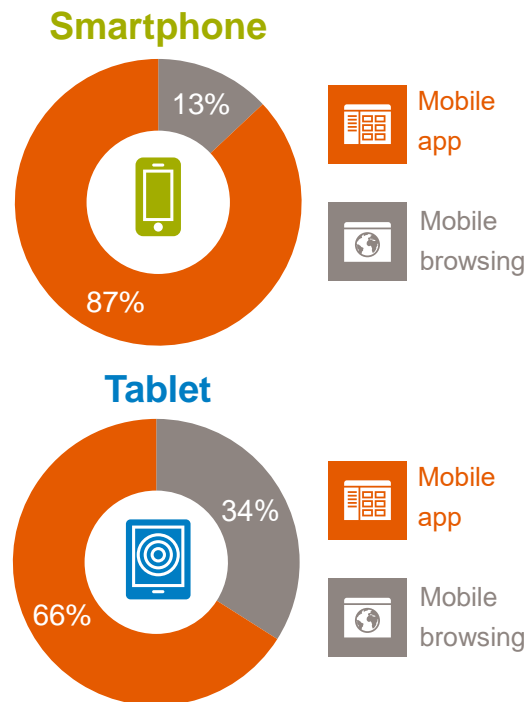
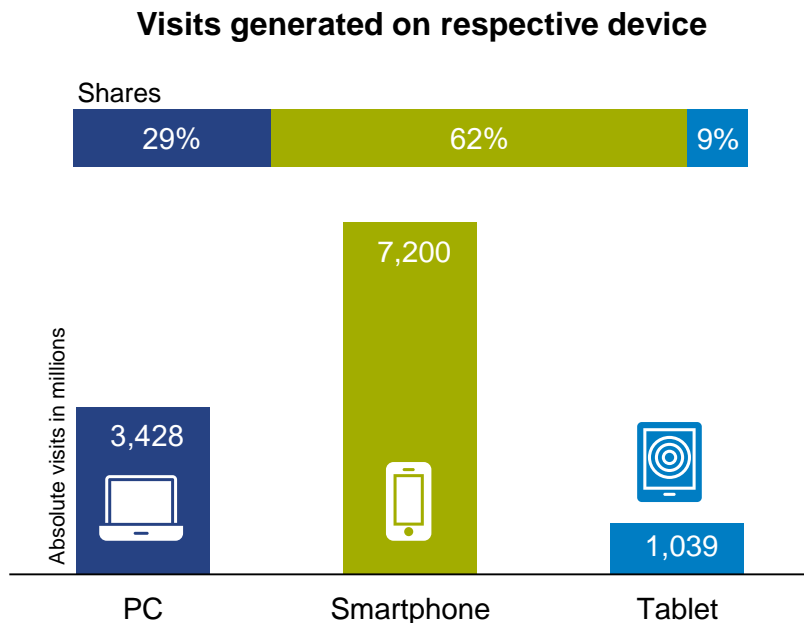
Usage of Social Media

Social media usage per device based on visits

Social media visits are by far lead by smartphones.



With a share of 62% of all social media visits, the smartphone is the leading device that is most frequented. Within the Russian Online Population 14+. Smartphones and tablets are used predominantly by app.

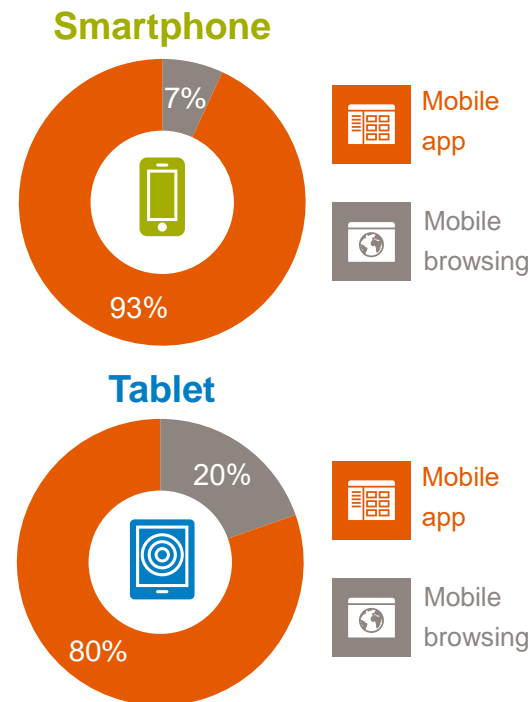
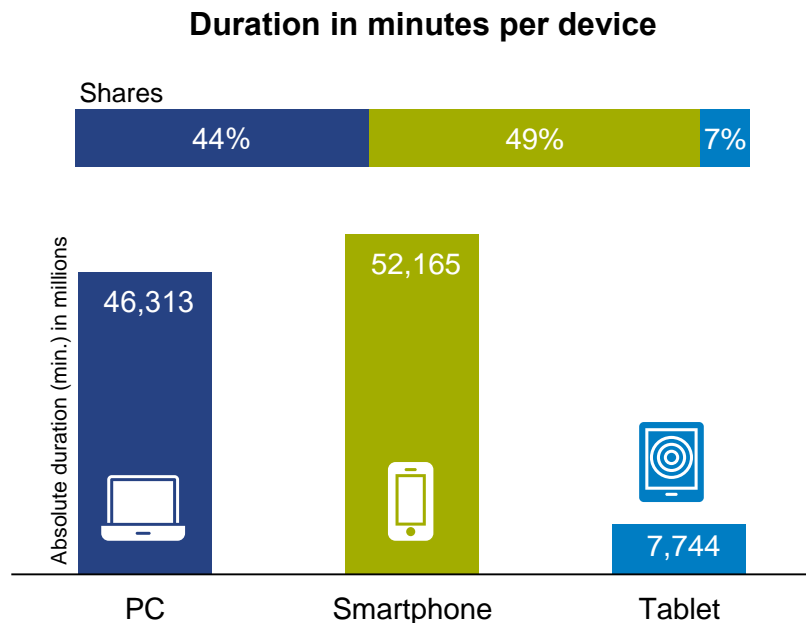


Social media usage per device based on **duration**

Smartphone is the leading device with approx. 50% of the usage duration.



Also based on the duration of social media usage within the Russian Online Population, the smartphone is the leading device. 52.165.424.188 minutes are spend on the smartphone on social media.

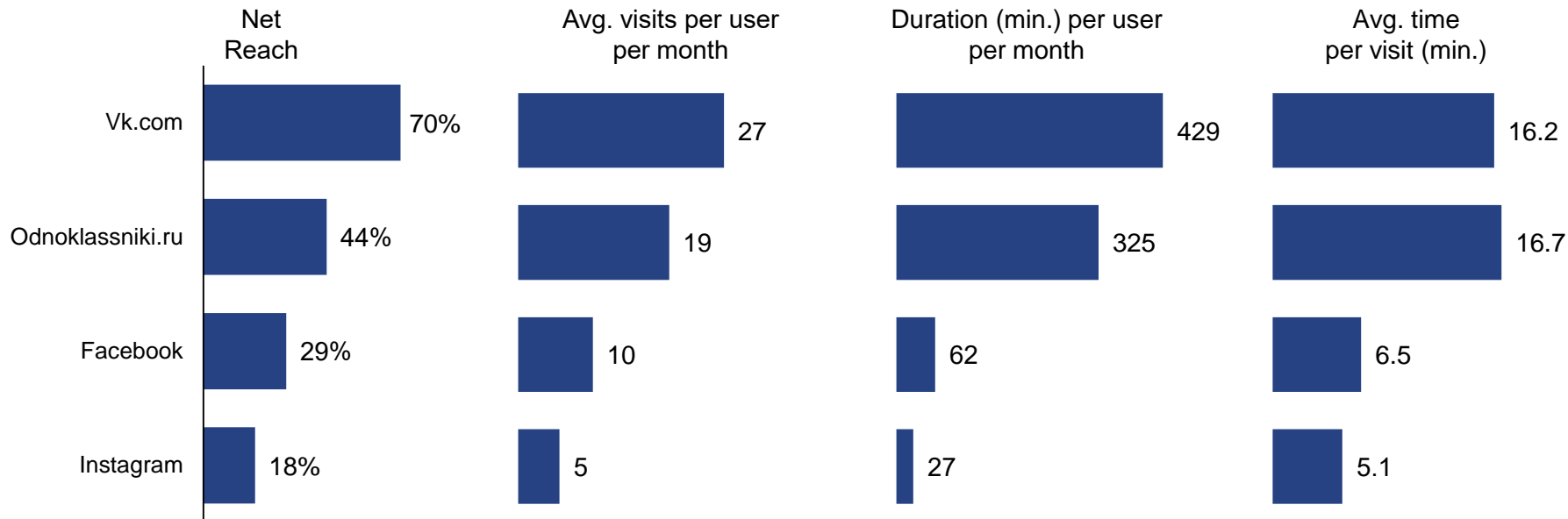


Top 4 Social media products on the PC

VK.com with 70% reach is leading within the social media products.



Based on the net reach, Vk.com is the leading social media product on the PC. Vk.com is used 429 minutes per month on average and has an average time per visit of 16,2 minutes.

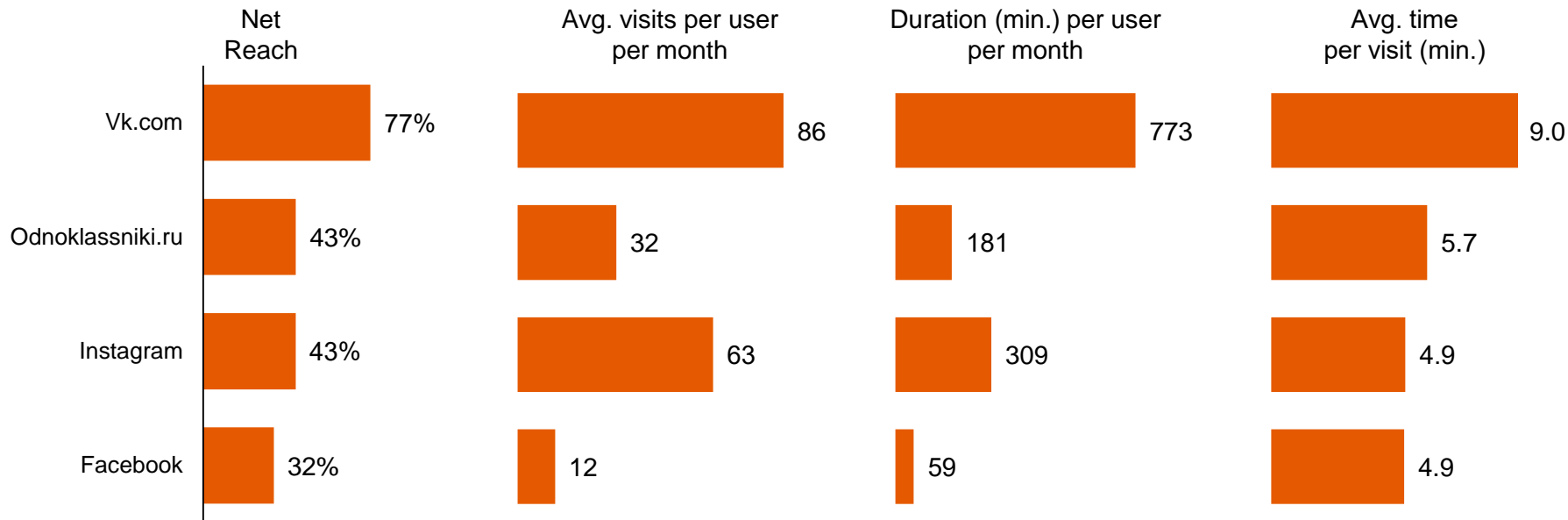


Top 4 Social media products on mobile devices

Vk.com is by far leading on all usage KPIs (reach, visit, duration).



Based on the net reach, Vk.com is the leading social media product on mobile devices. Vk.com is observed 773 minutes per month on average and has an average time per visit of 9 minutes.



Reach overlaps between social media products

Two out of three Vk.com users also use Odnoklassniki.ru.



While more than 90% of all users of the other offerings use Vk.com. A similar picture is drawn for Odnoklassniki.ru: More than 70% of the users of Facebook, Instagram and Mail.Ru Answers are also using Odnoklassniki.ru.

	Vk.com	Odnoklassniki.ru	Facebook	Instagram
Vk.com	100%	91%	94%	98%
Odnoklassniki.ru	66%	100%	74%	73%
Facebook	51%	54%	100%	65%
Instagram	47%	49%	59%	100%

Reading example: 66% of Vk.com users also use Odnoklassniki.ru



4

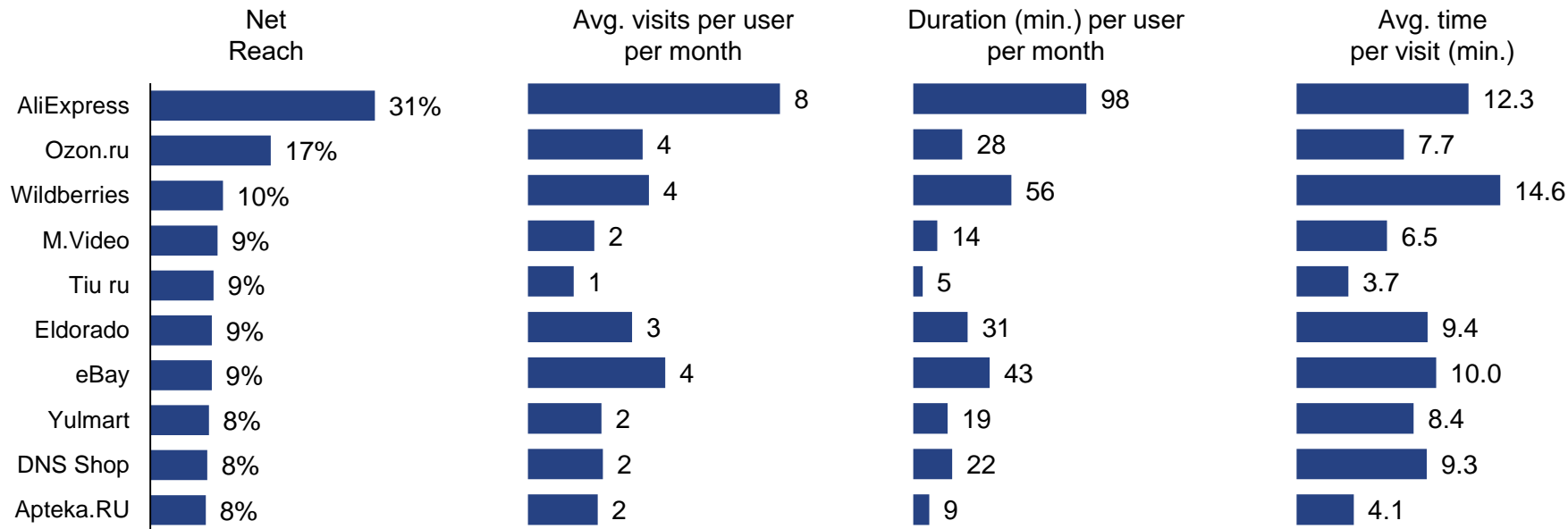
Industry Chapter: E-Commerce

Top 10 e-commerce products on PCs

AliExpress has the highest reach, Wildberries the highest avg. time per visit.



Based on the net reach, AliExpress is the leading e-commerce product on PC devices. AliExpress users spends most time in minutes per month on average, 98 minutes. However, the avg. time per visit is highest on Wildberries (14,6 min.).

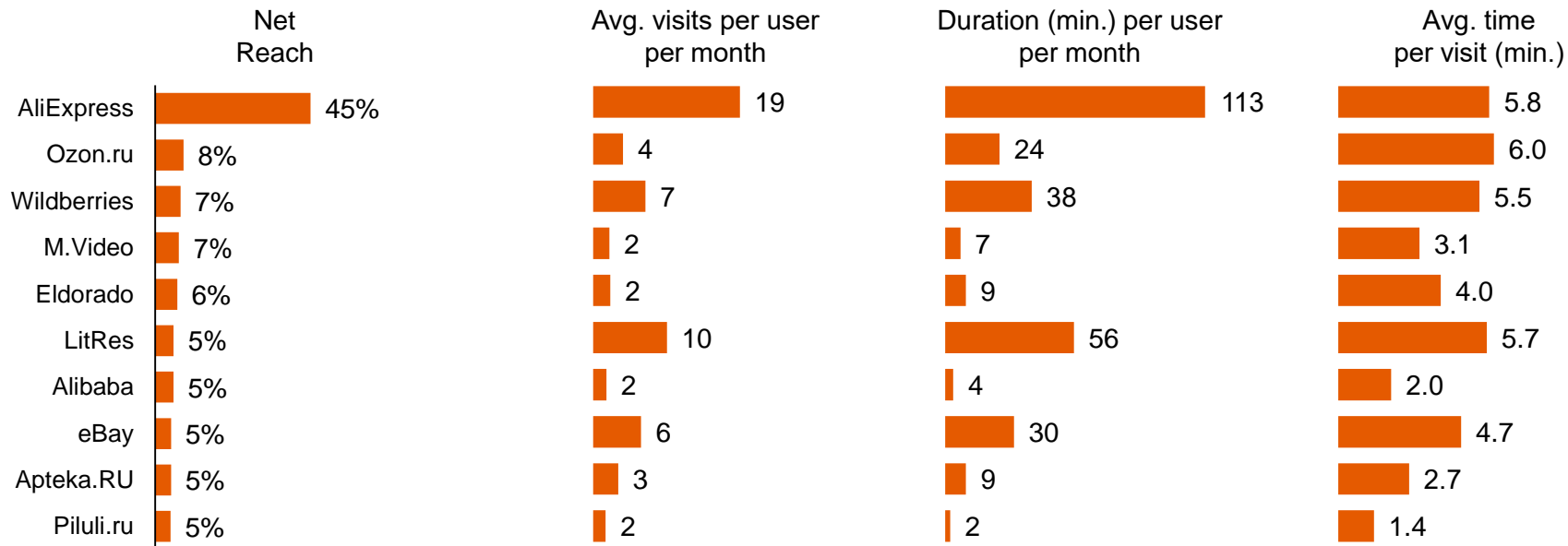


Top 10 e-commerce products on mobile devices

AliExpress is, in terms of reach, by far the leading e-commerce product.

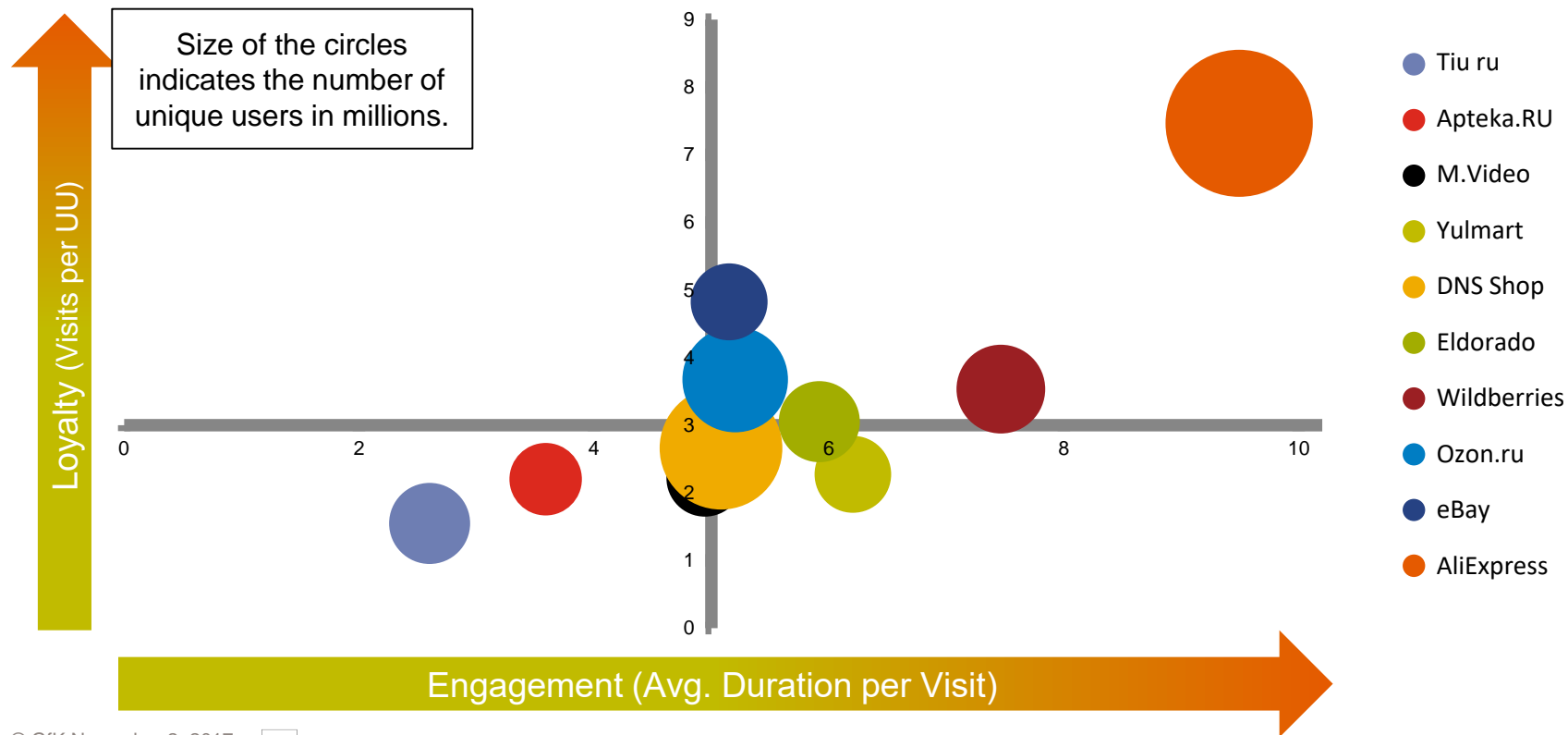


Based on the net reach, AliExpress is the leading e-commerce product on mobile devices. AliExpress users spend most time in minutes per month on average, 113 minutes.



Loyalty and engagement per visit for key e-commerce products

AliExpress is the platform with the most loyal and engaged user.



Reach overlaps between e-commerce products

Highest cross-usage (76%) is between Eldorado users and AliExpress.



More than 70% of the other e-commerce product users use also the leading product AliExpress.

	AliExpress	Ozon.ru	Wildberries	M.Video	Eldorado
AliExpress	100%	70%	70%	71%	76%
Ozon.ru	29%	100%	42%	46%	49%
Wildberries	20%	29%	100%	28%	26%
M.Video	19%	29%	26%	100%	41%
Eldorado	19%	29%	23%	38%	100%

Reading example: 29% of AliExpress users also use Ozon.ru.

We can provide this information for many different industries.
Below are some examples:



Travel



Finance



Gaming



Retail



Home & Garden



Cosmetics



Food



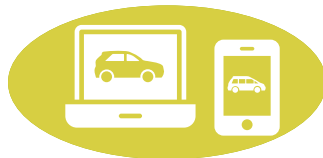
Telecommunication



Beverages



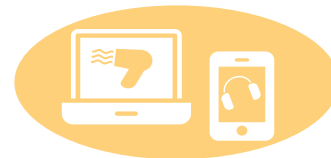
Automotive



Medical



Electronics



A man with short brown hair and a light beard is smiling while talking on a black mobile phone. He is wearing a dark blue suit jacket, a light blue dress shirt, and a dark blue patterned tie. The background is a blurred cityscape with tall buildings.

Your GfK Consultants

For questions, please contact:



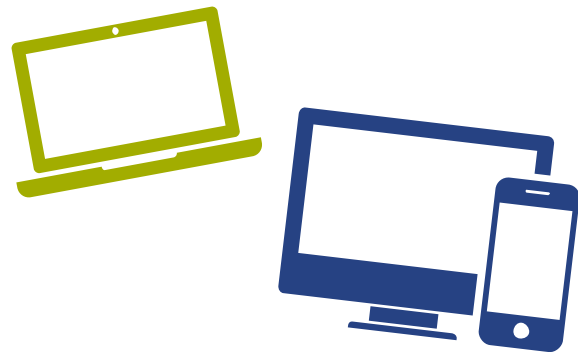
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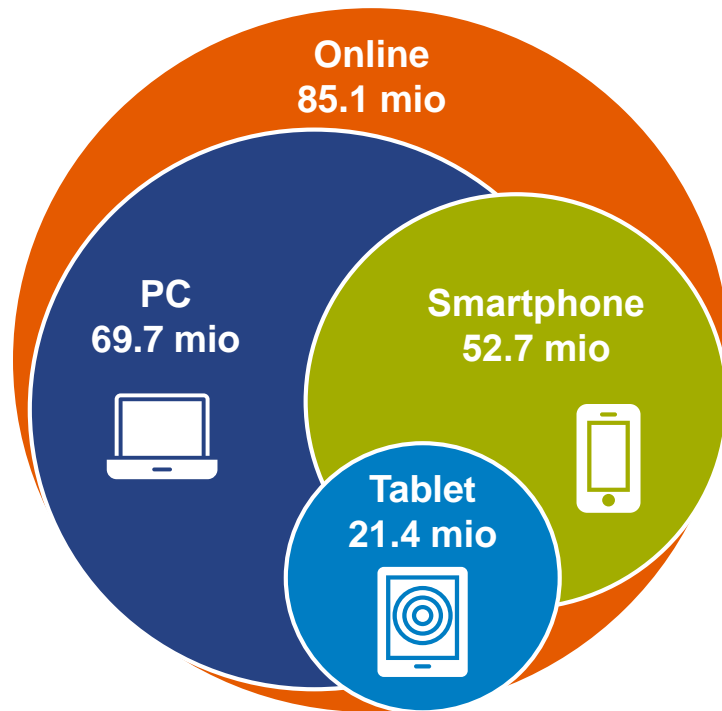
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The composition of the online population

In total, 85 million Russian over the age of 14 have access to the internet.



Methodology

The data is based on a combination of passive digital and survey-based TV and print behaviour measurement.



Overview of all included media channels



Passive measurement



Internet

- access
- personal use
- intensity of usage
- weekly usage duration
- used genres, services
- type of connection at home
- provider at home
- usage of selected websites

Survey



TV

- various TV genres
- time slots per days
- pay-TV-access



Magazines and newspapers

- lifestyle magazines
- food magazines
- computer/game magazines
- auto/yachting magazines
- women's magazines
- men's magazines
- home/garden magazines
- business/financial news
- travel/nature magazines
- daily, weekly and weekend newspapers

Description of available KPI's



- **Unique User (UU):** indicates the number of users visiting a website. A person is hereby counted only once per month, though the user has visited the website more often.
- **Net reach :** share of users within universe, with at least one contact with a website or app
- **Sessions*** (absolute): total number of website visits in one month
- **Sessions per UU:** average number of visits of an unique user within one month
- **Impressions** (absolute): number of page / app requests per month
- **Impressions per UU:** average number of page / app requests per month of an unique user
- **Duration:** absolute usage time (how much time spend on website/app?)
- **Duration per user** (duration/user in minutes): duration per user specifies how long a user was on average on the website / app throughout the month.
- **Usage days** (average per UU): average number of days per month, where a site / app has been used
- **INDEX Engagement:** is a combination of net reach per device and duration and takes visits on a website/app into account as well as intensity of usage (duration). ($\text{Index Engagement} = 0,3 * \text{Index Net Reach Device} + 0,7 * \text{Index Duration}$)
- **INDEX net reach device** = $\text{Net Reach device (Target audience)} * 100 / \text{Net Reach device (basis settings)}$
- **INDEX Duration** (not displayed, only for calculation of the engagement index) = $\text{Duration UU (Target audience)} * 100 / \text{Duration UU (basis settings)}$

*Sessions are often also known as ,Visits'



Taxonomy

We provide an innovative view on the market hierarchy: The A2C Taxonomy.

Brand

Product

The **Product Level** provides an overview of the ownership hierarchy of the entities on the market.

(e.g. **Booking.com** – **Booking.com**)

On the **Content Level** there are three basic dimensions:

Activity

Context

Content

Activity: Basic information on what is being done
Booking.com: Price / Product Comparison

Context: Determines the business owner
Booking.com: Travel

Content: Understanding of the content
Booking.com: Service Sector

Examples of activities based on the A2C taxonomy



- 1. Communication** Sites/Apps for interpersonal communication (email, instant messaging, VoIP, chat and video chat, ...). Examples: Mail.Ru Mailbox, Yandex Mail, WhatsApp Messenger, Viber
- 2. Gaming / Gambling** Sites/Apps for gaming and gambling. Examples: Google Play Games, World of Tanks, Stoloto, Lotzon
- 3. News / Information** Sites/Apps for accessing volatile news and information, including personal home pages and blogs. Examples: Mail.Ru Homepage, Yandex News, uCoz
- 4. Shopping / Auctions / Rent** Sites/Apps for buying and selling products and services, including marketplaces, classifieds, and couponing. Example: Google Playstore, AliExpress, Avito Homepage, Yula
- 5. Social Networking** Sites/Apps for social communities (forums, networking, dating, ...). Examples: Vk.com, Odnoklassniki.ru, Instagram
- 6. Web Search** Sites/Apps for open web search, including comparison of services (travel, utilities). Example: Google search, Yandex search, Mail.Ru Search

Thank you!