



cutting through complexity™

KPMG – Consumer and Convergence 5 Study

Russia Report

October 2011

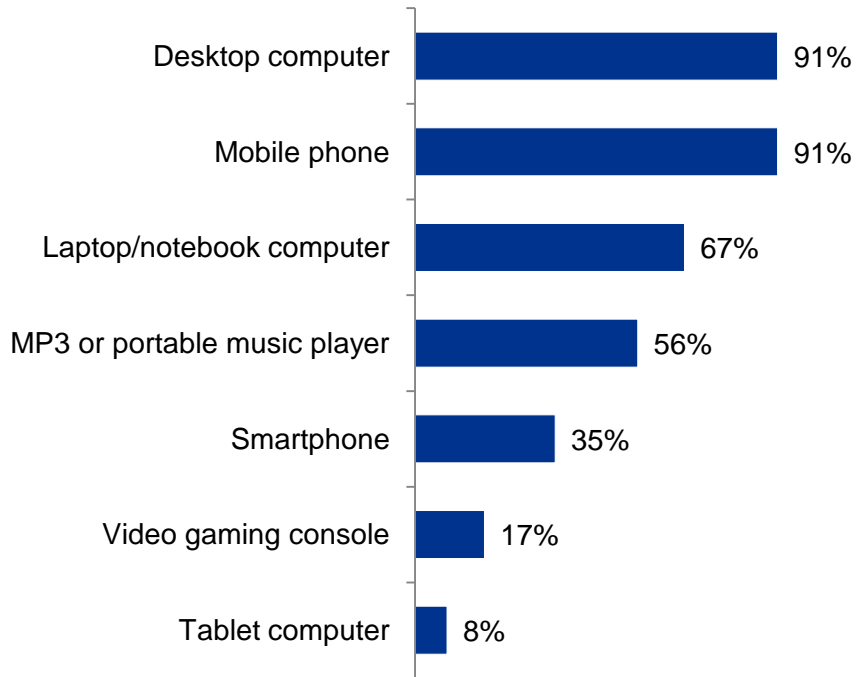
Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Demographics (1/3)

S1. Do you have access to and use the following?

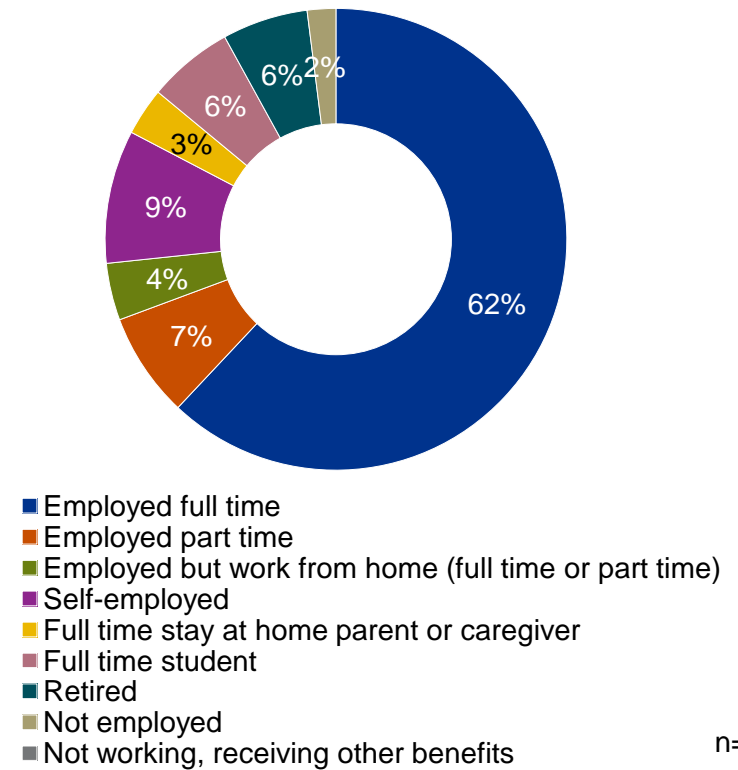
Gadget Usage



n=300

S2. Which of the following best describes your current employment status?

Employment Status

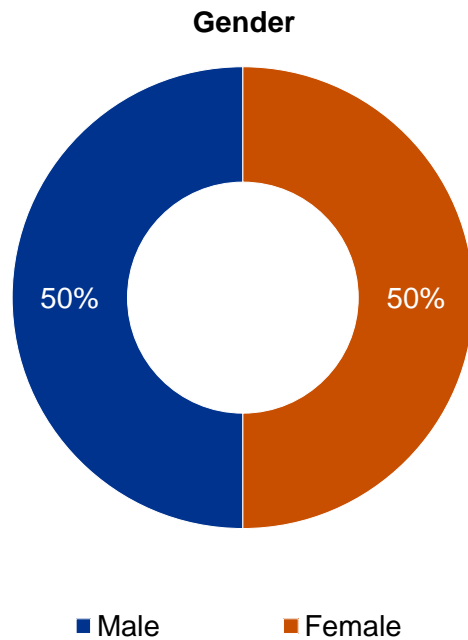


n=300

Figures do not add up to 100% because multiple responses were allowed
Percentages might not add to 100 due to rounding off

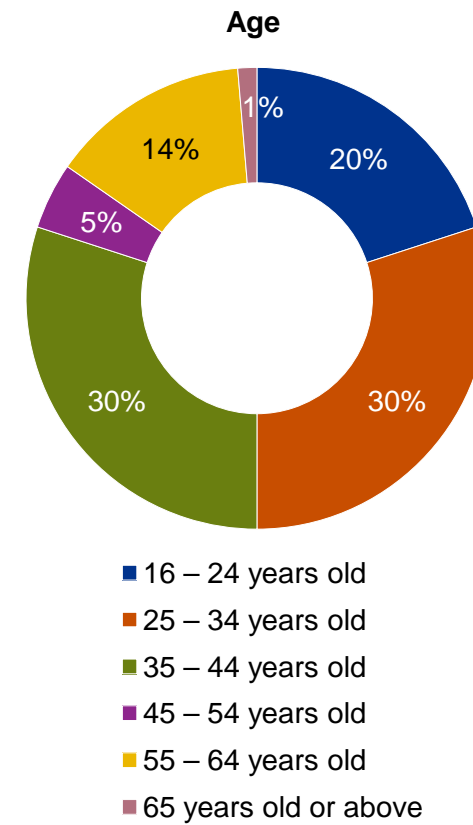
Demographics (2/3)

S3. Are you:



n=300

S4. How old are you?



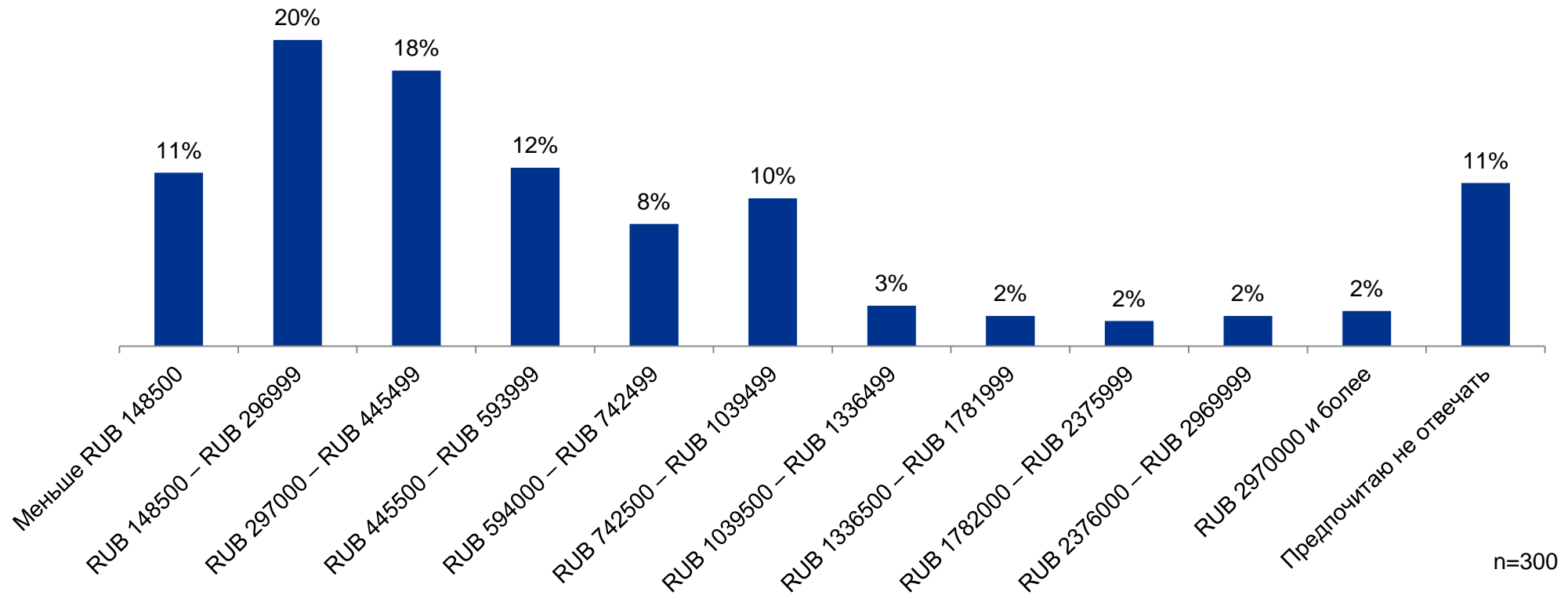
n=300

Percentages might not add up to 100 due to rounding off

Demographics (3/3)

Q40. Please indicate your total annual household income

Income



n=300

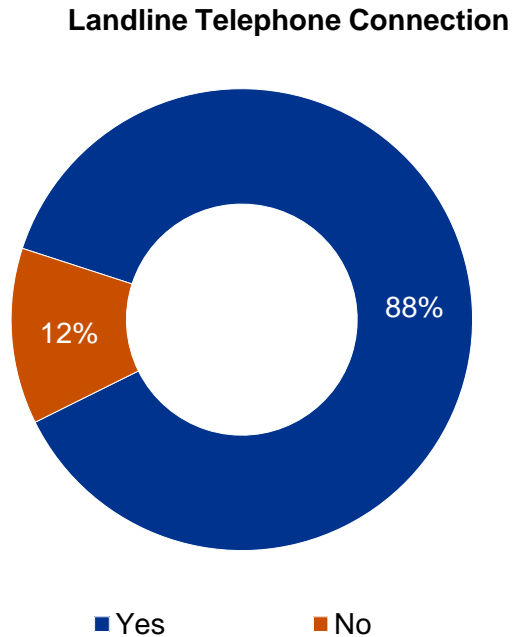
Percentages might not add up to 100 due to rounding off

Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

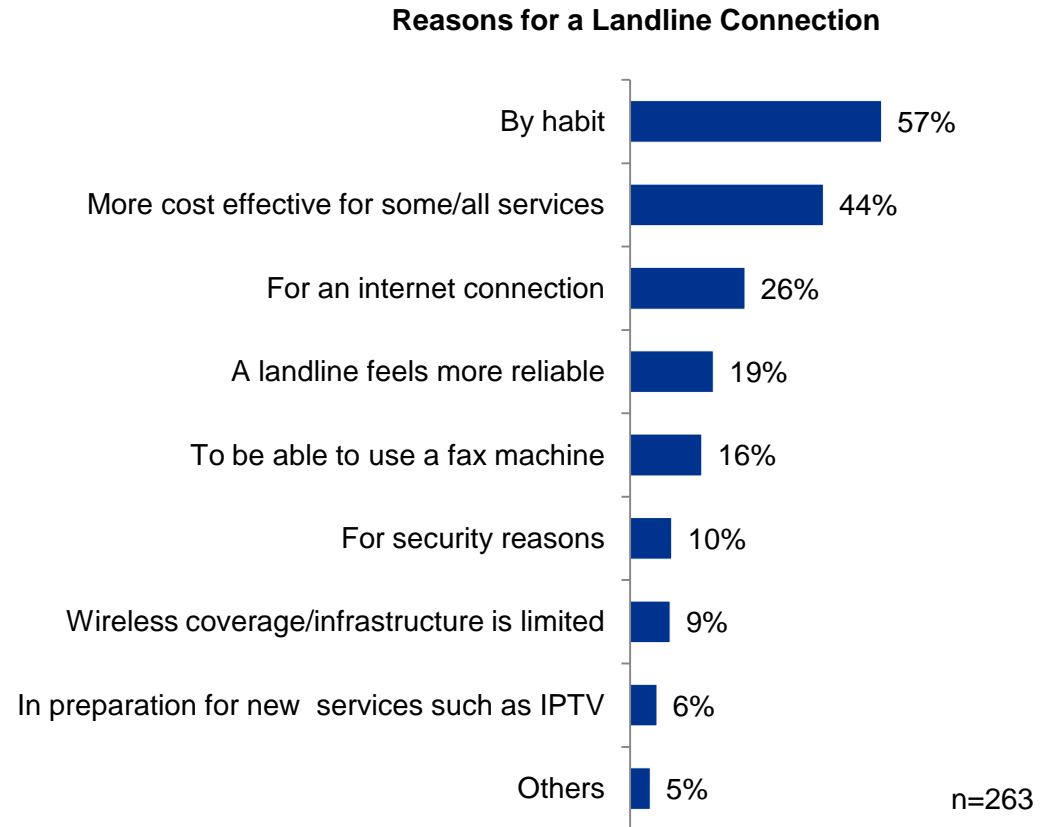
Landline Telephone Connection (1/2)

Q1. Do you have a landline telephone connection?



n=300

Q2. Please let us know why you have a landline connection

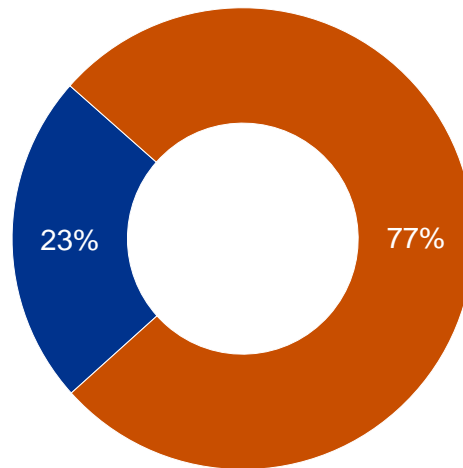


Percentages might not add up to 100 due to rounding off
Figures do not add up to 100% because multiple responses were allowed

Landline Telephone Connection (2/2)

Q3. Within the next 12 months do you plan to eliminate your landline telephone connection and use your mobile phone only

Landline Connection to Mobile Phone



■ Yes ■ No

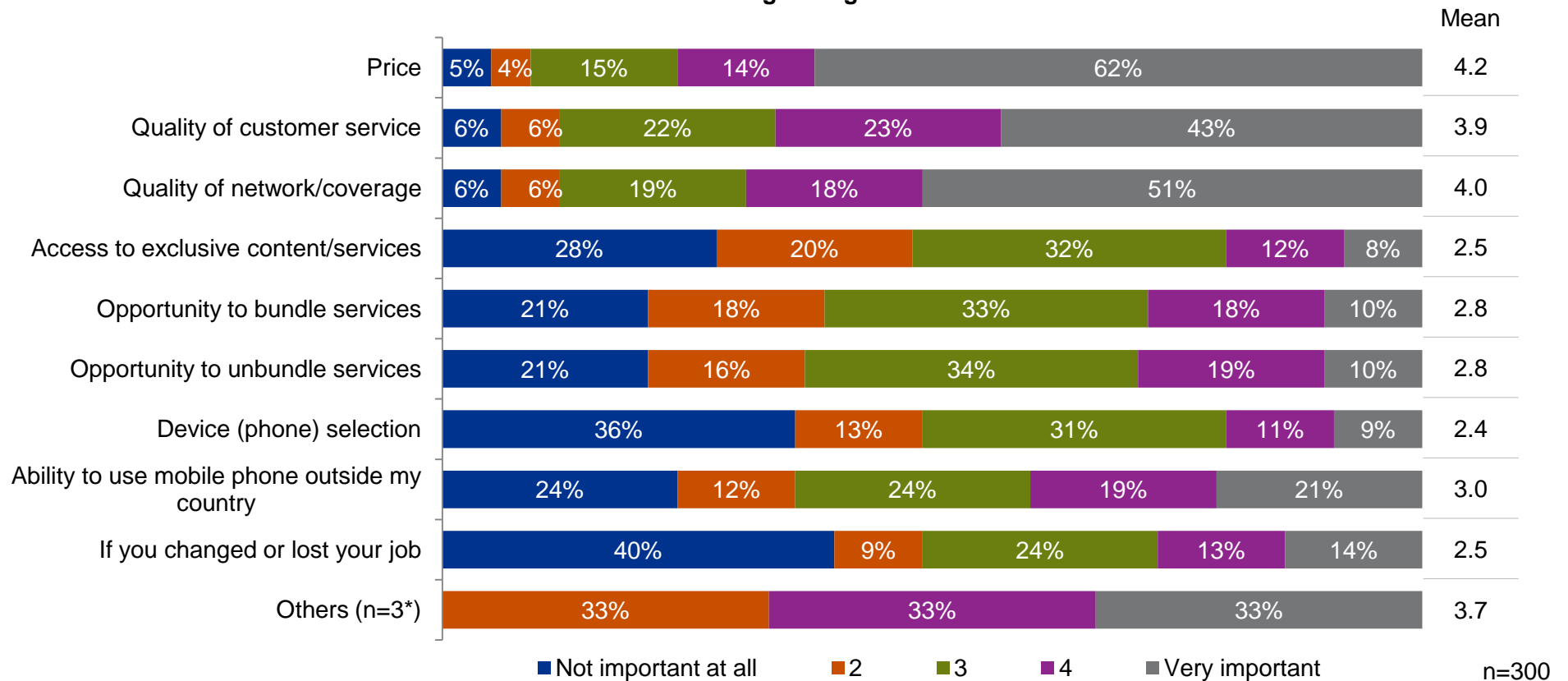
n=263

Percentages might not add up to 100 due to rounding off

Mobile Service Provider

Q4. What would drive you to change your mobile service provider? Please rate the importance of each of the following factors in driving your decision. Use a 1-5 scale where 1=not important at all and 5=very important.

Factors Driving Change in Mobile Service Provider



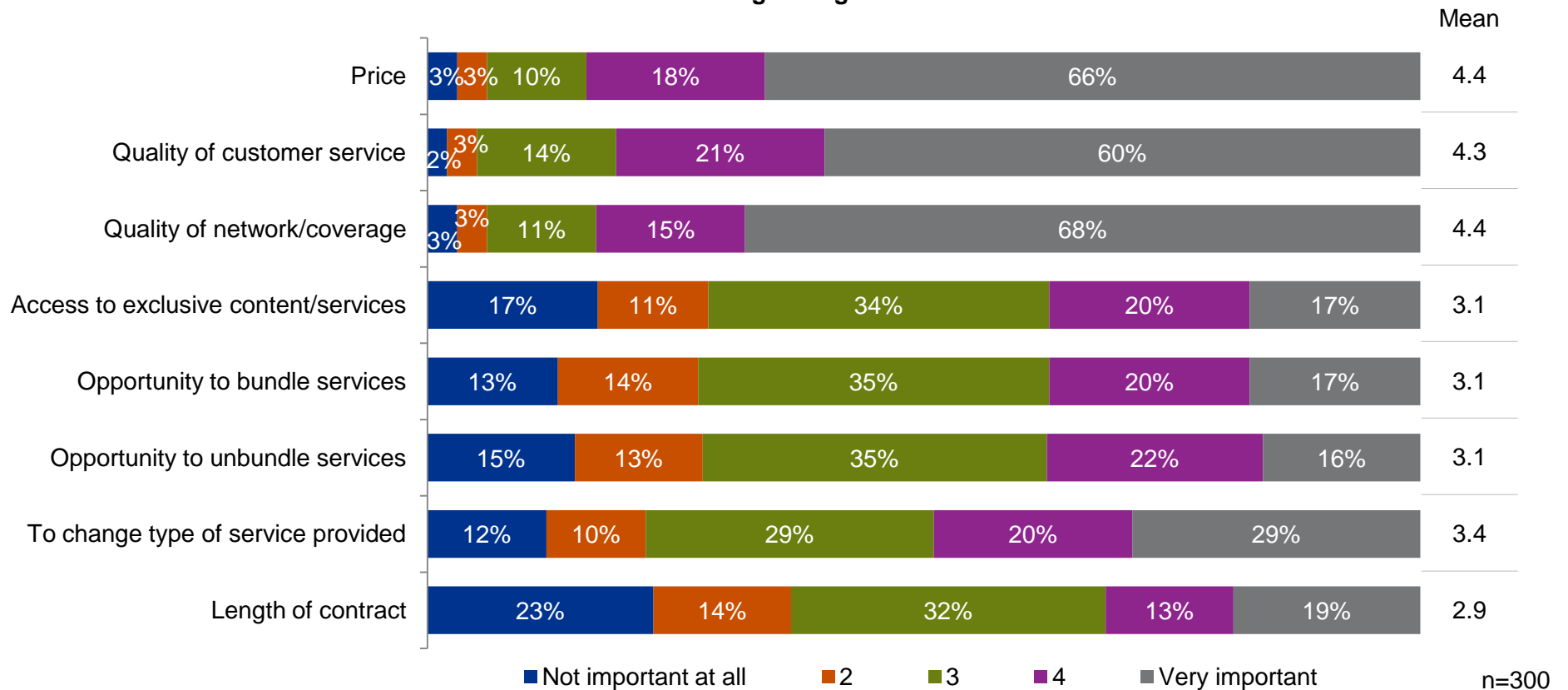
I don't have a mobile phone = Yes (0%) | No (100%) n=300

*Low base – findings are directional in nature
Percentages might not add up to 100 due to rounding off

Internet Service Provider

Q5. What would drive you to change your internet service provider? Please rate the importance of each of the following factors in driving your decision. Use a 1-5 scale where 1=not important at all and 5=very important.

Factors Driving Change in Internet Service Provider



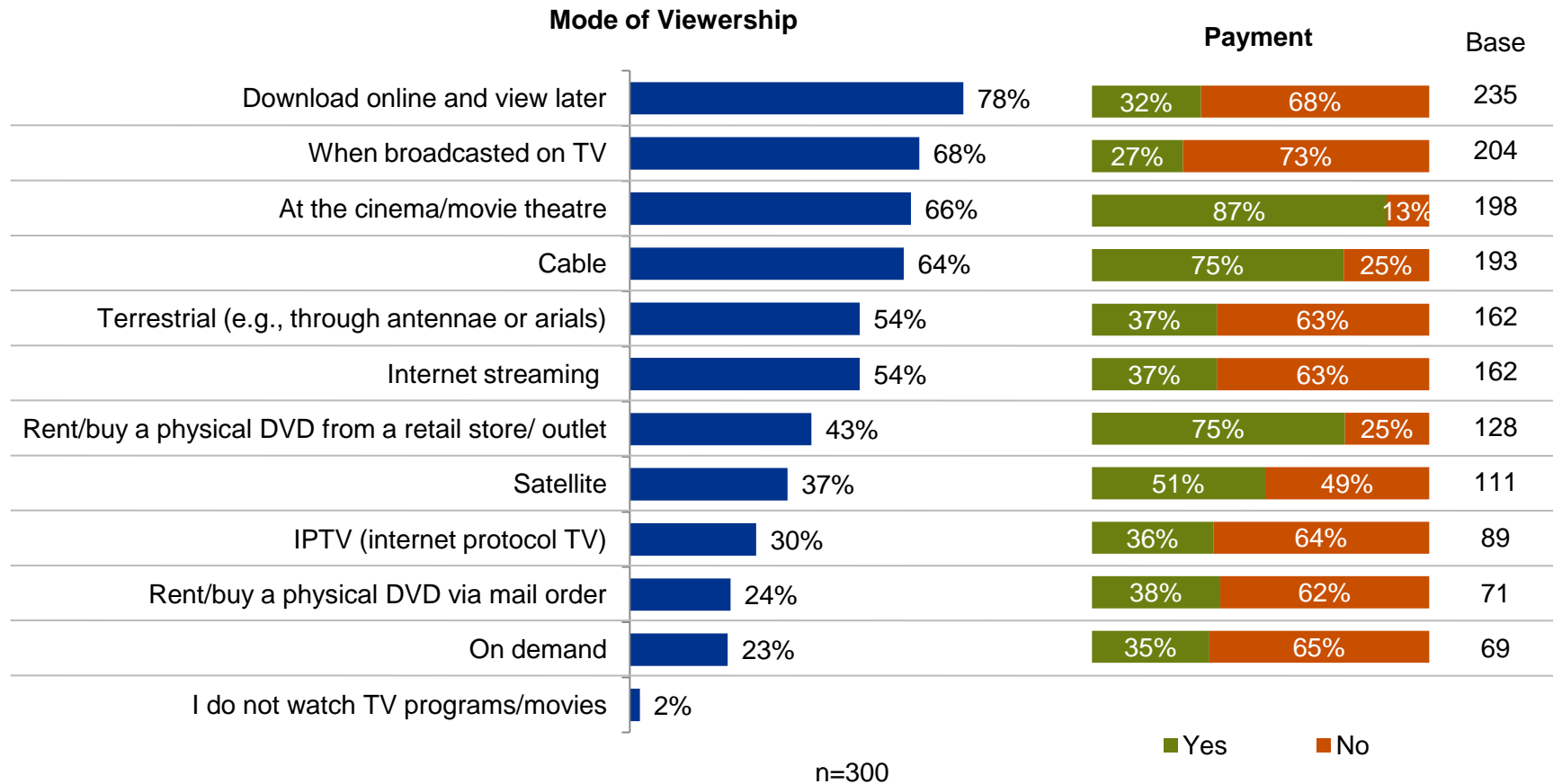
Percentages might not add up to 100 due to rounding off

Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

TV Programs and Movies | Mode of Viewership and Payment

Q6. How do you view most of your TV programs and movies? And do you pay for it?

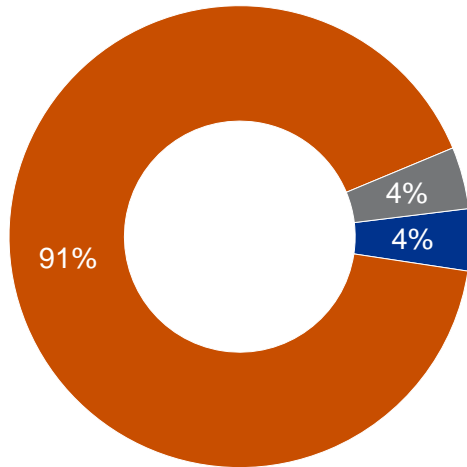


Figures do not add up to 100% because multiple responses were allowed
Percentages might not add up to 100 due to rounding off

Plan to Eliminate Home TV Service Within Next 12 Months

Q7. Do you plan to eliminate your TV service (cable, satellite or IPTV) at home within the next 12 months?

Plan for Eliminating Home TV Service

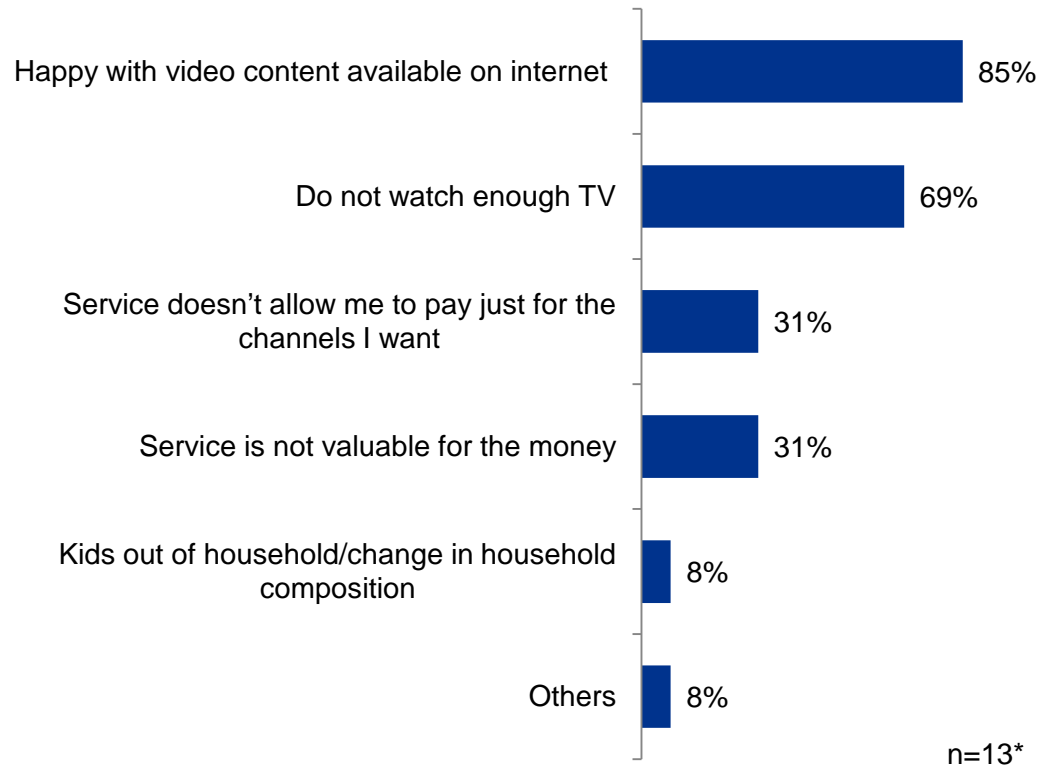


- Yes
- No
- I do not subscribe to a TV service at home

n=300

Q8. Why do you plan to eliminate your home TV service (cable, satellite or IPTV)?

Reasons for Eliminating Home TV Service

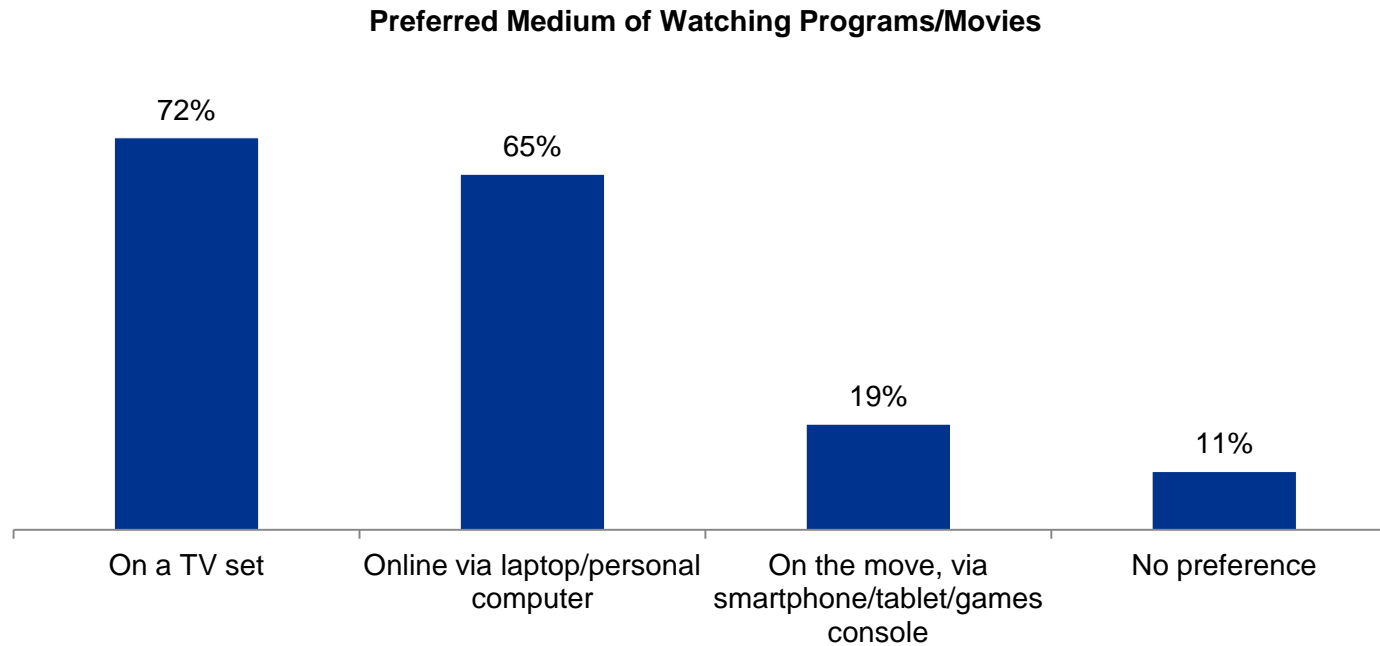


n=13*

*Percentages might not add up to 100 due to rounding off
 Figures do not add up to 100% because multiple responses were allowed
 Low base – findings are directional in nature

Watching Programs/Movies | Preferred Medium

Q9. Given the choice, how would you prefer to watch TV programs/movies?



n=300

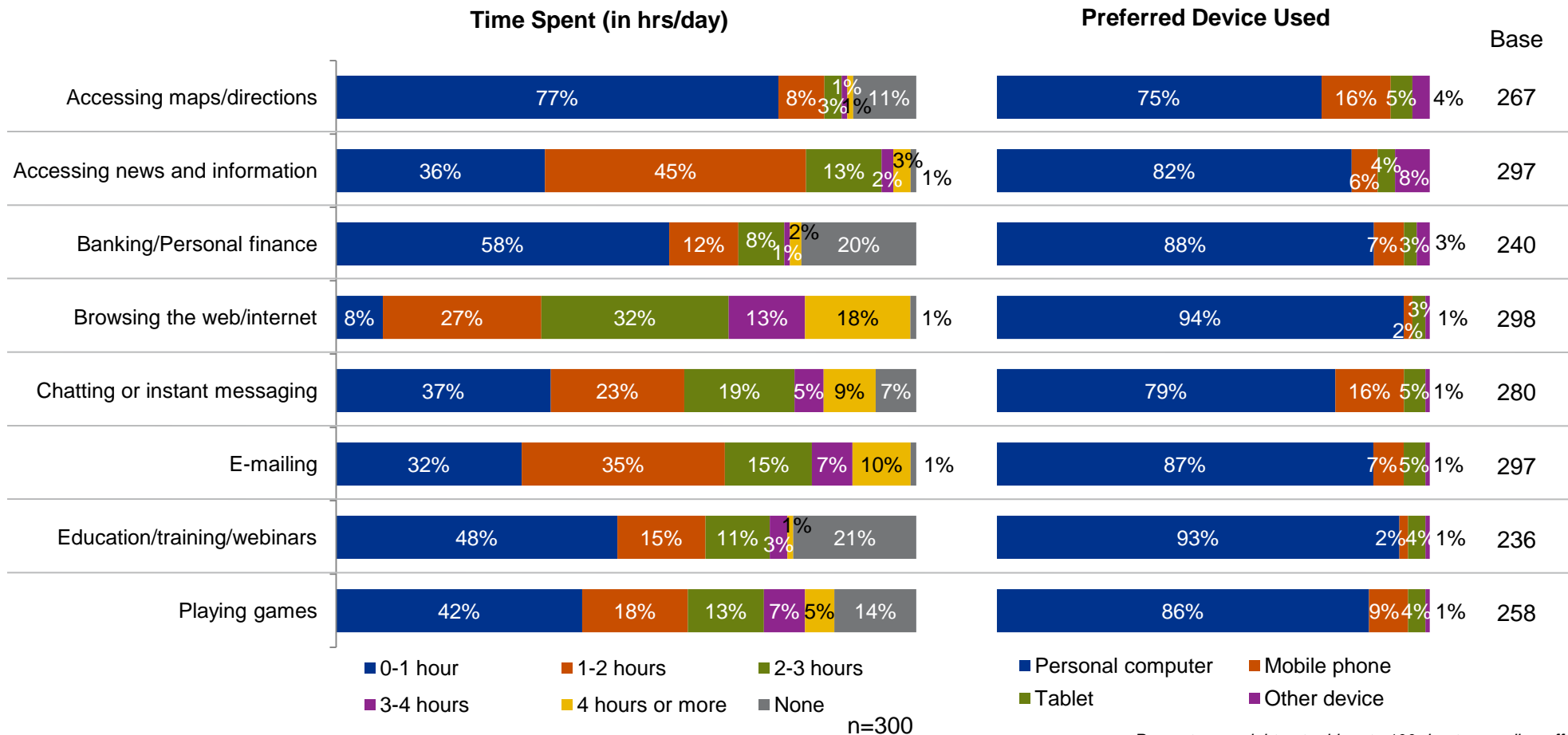
Figures do not add up to 100% because multiple responses were allowed

Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Time Spent Online and Preferred Device Used (1/2)

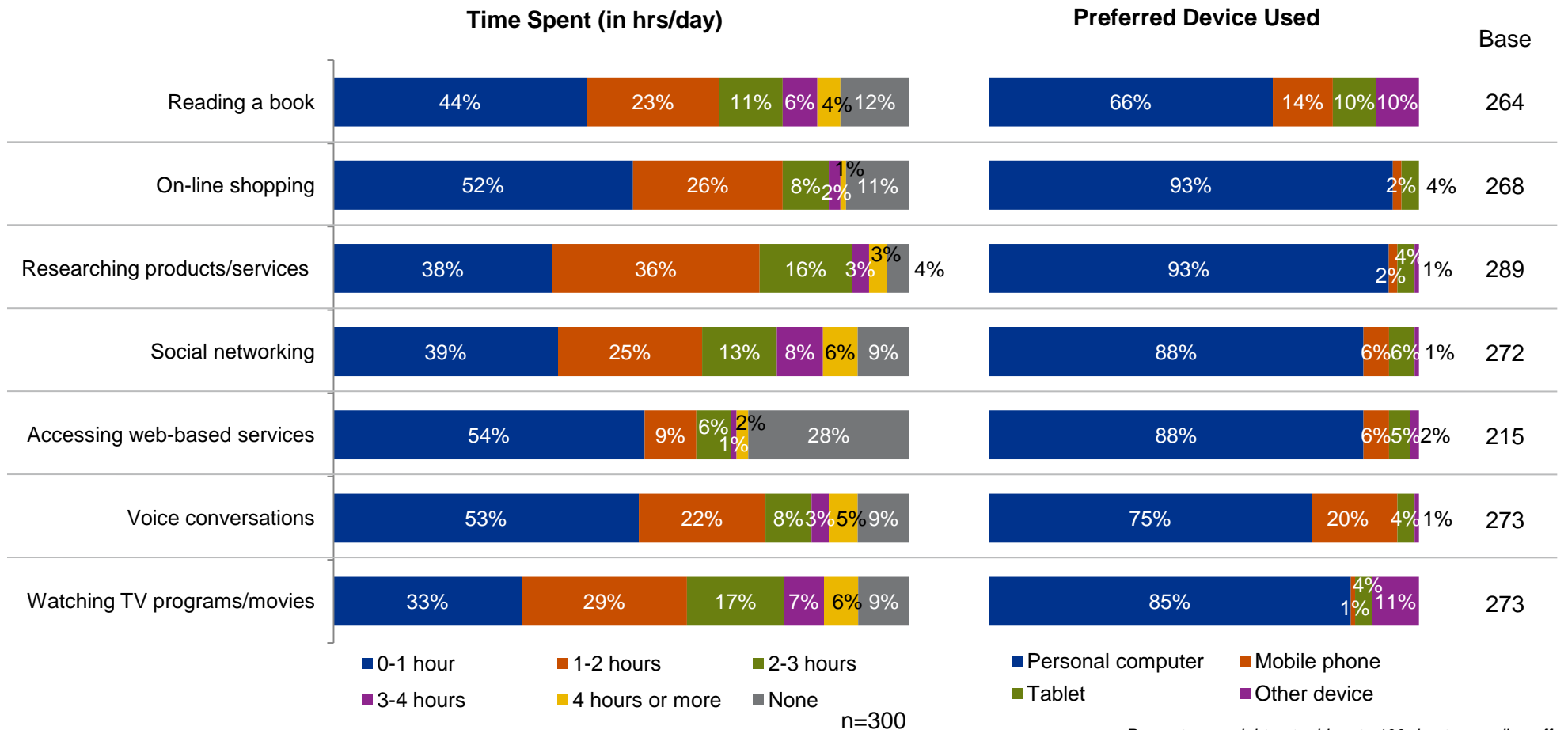
Q10. Excluding time spent for work and/or school, approximately how many hours per day do you spend on each activity? What is your preferred device when conducting the activity?



Percentages might not add up to 100 due to rounding off

Time Spent Online and Preferred Device Used (2/2)

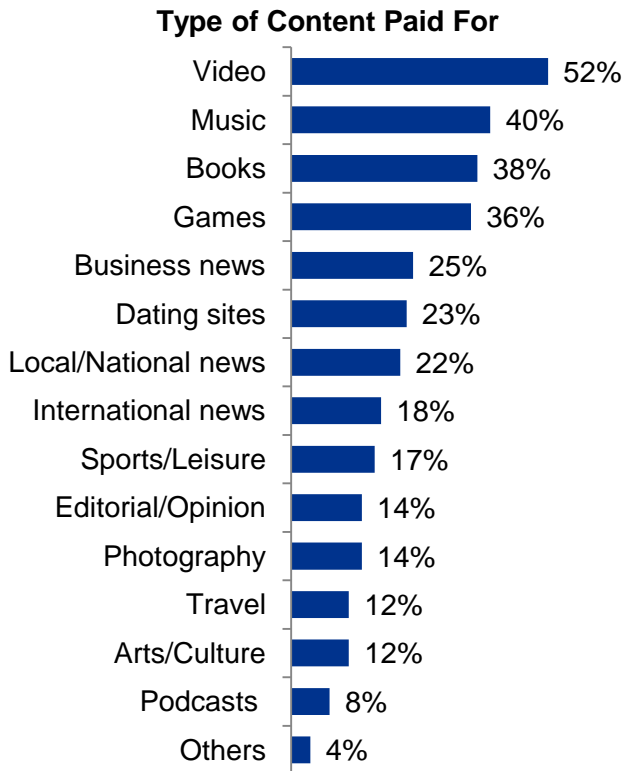
Q10. Excluding time spent for work and/or school, approximately how many hours per day do you spend on each activity? What is your preferred device when conducting the activity?



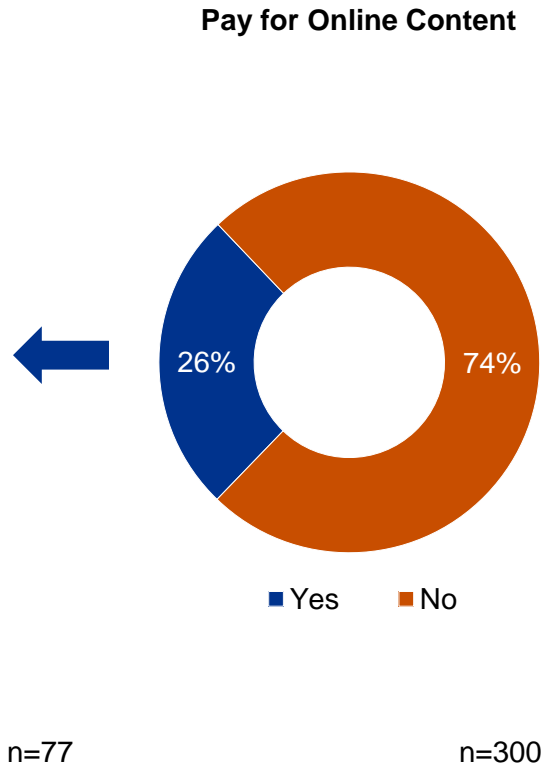
Percentages might not add up to 100 due to rounding off

Online Content | Payment Behavior (1/3)

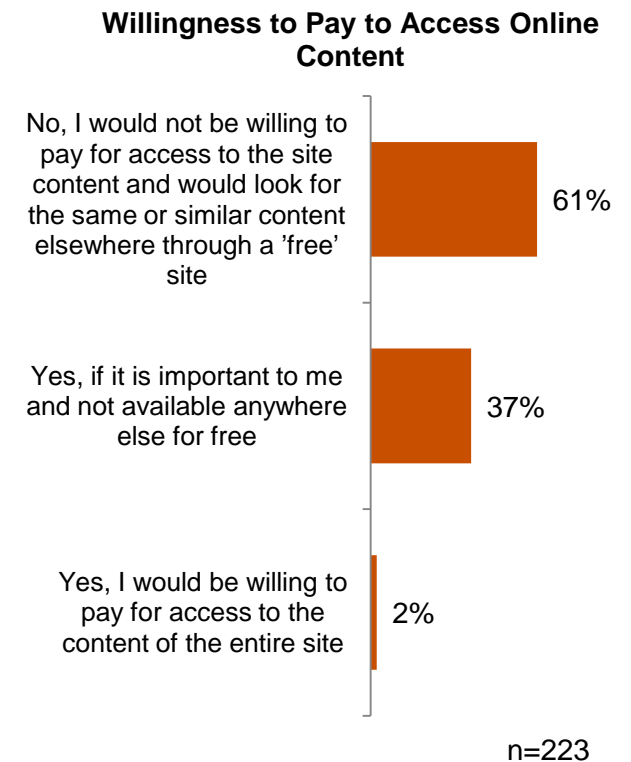
Q12. What type of content do you currently pay for?



Q11. Do you currently pay to access content on any websites that you visit?



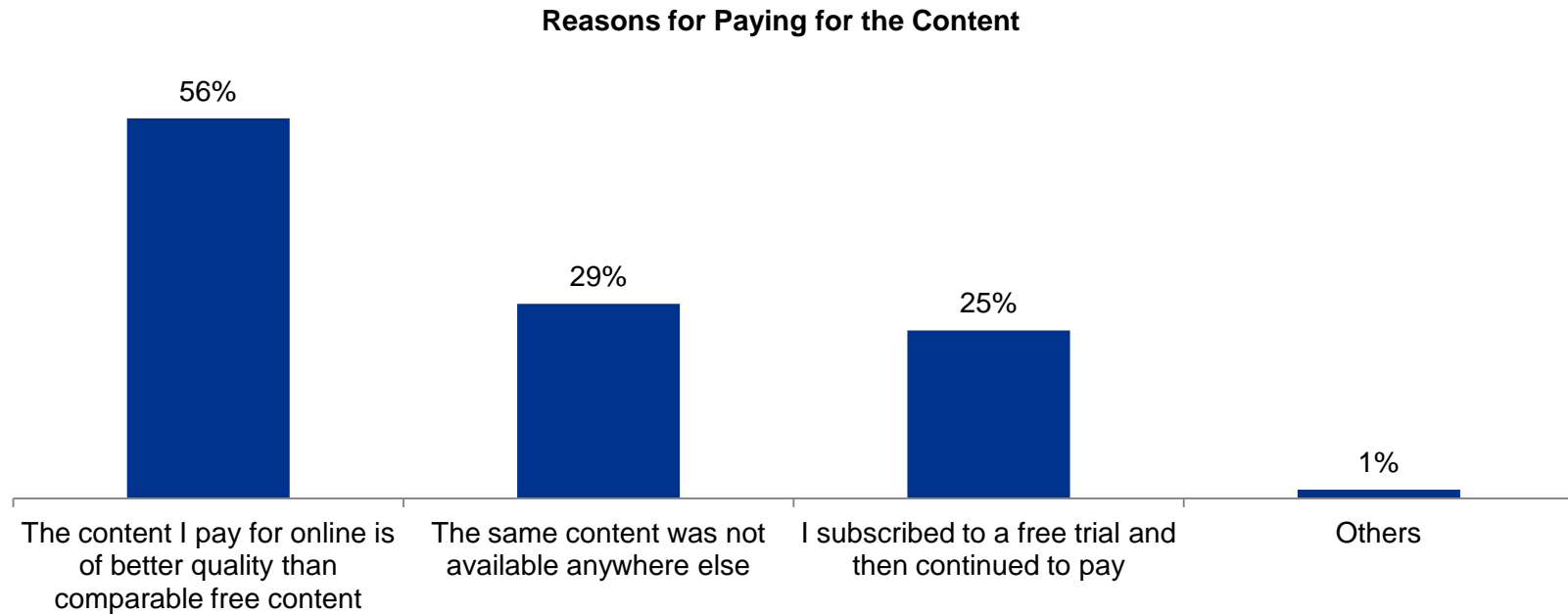
Q14. If an online or mobile content site you frequently visit begins charging for access to content, would you be willing to pay to gain access to the content?



Figures do not add up to 100% because multiple responses were allowed. Percentages might not add up to 100 due to rounding off.

Online Content | Payment Behavior (2/3)

Q13. What was your main reason for paying for the content?

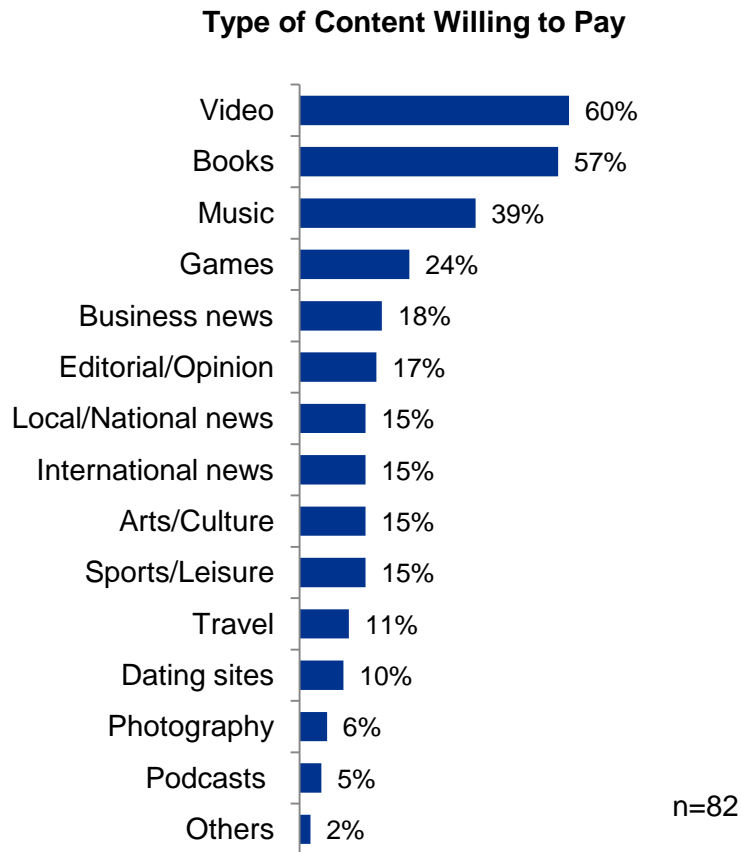


n=77

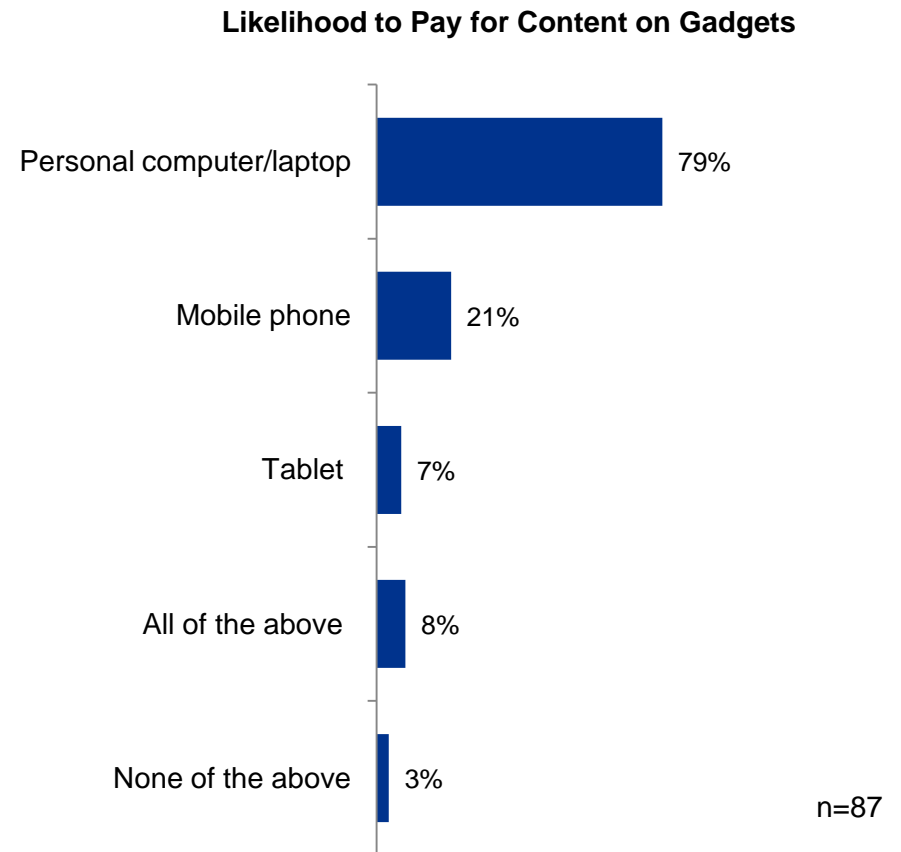
Figures do not add up to 100% because multiple responses were allowed

Online Content | Payment Behavior (3/3)

Q15. Please select the type of content for which you would be willing to pay, if an online or mobile content site you frequently visit begins charging for access to content



Q16. Would you be most likely to pay for content received on your mobile phone, tablet or your personal computer/laptop?



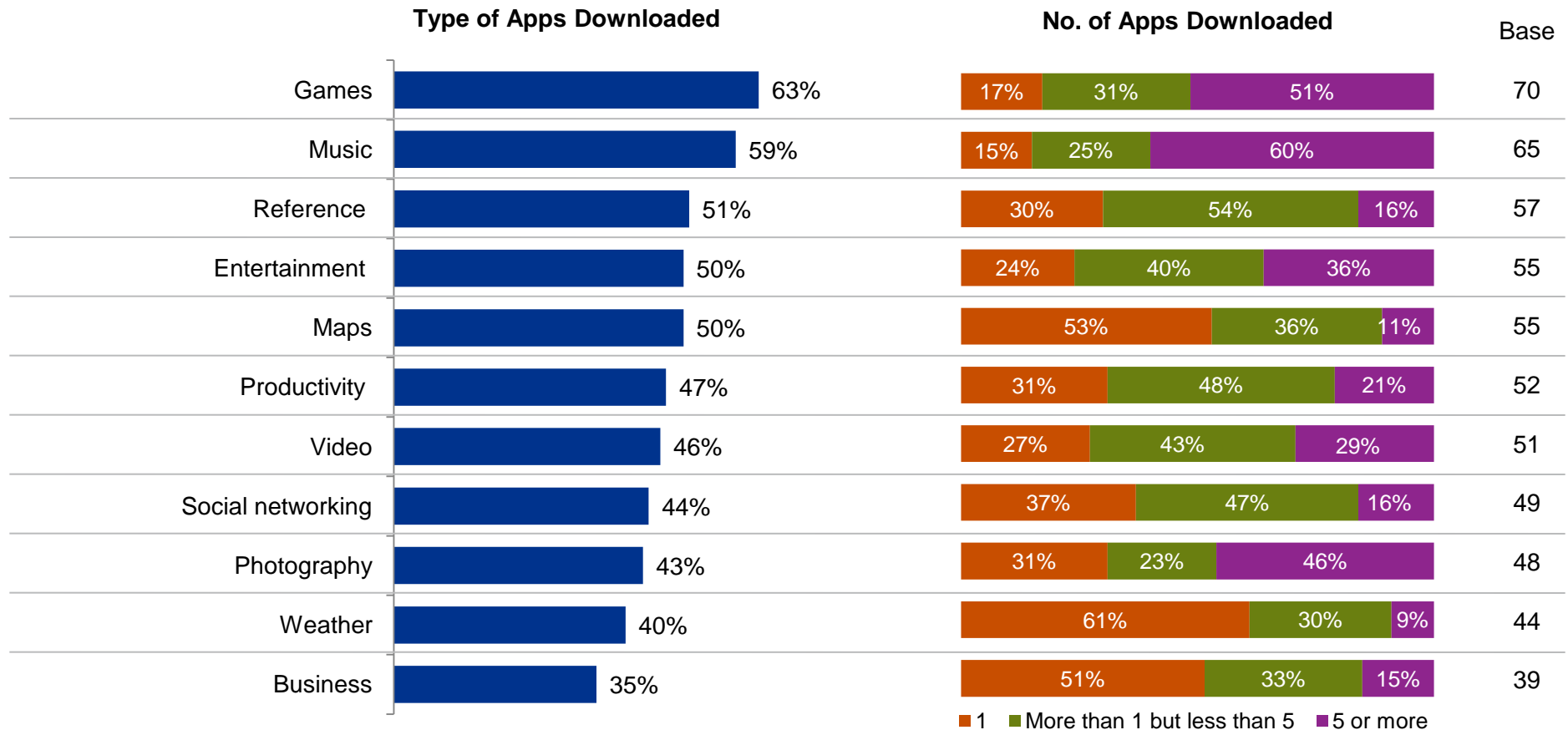
Figures do not add up to 100% because multiple responses were allowed

Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Types and Number of Apps Downloaded (1/2)

Q17. What types of apps have you downloaded to your tablet or Smartphone? Approximately how many apps have you downloaded?



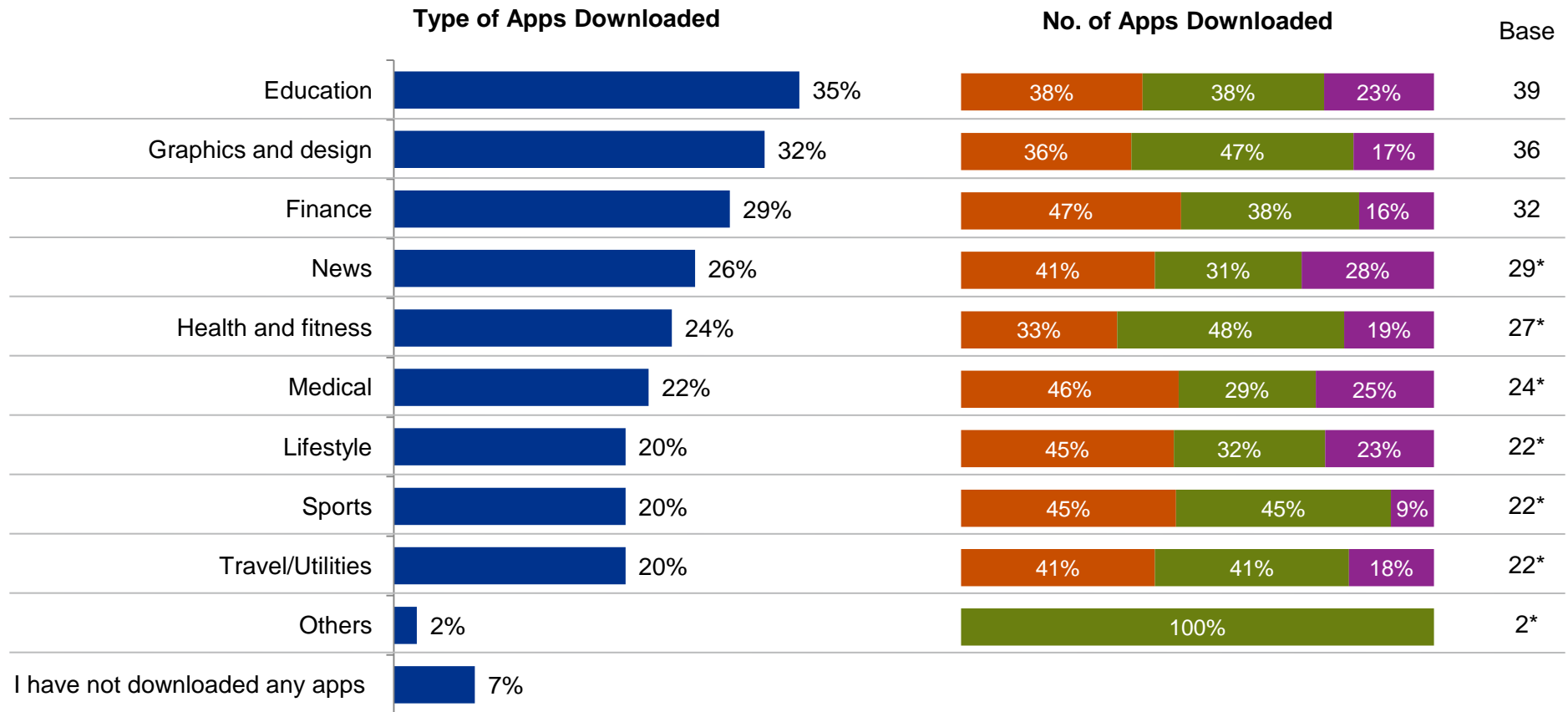
n=111

■ 1 ■ More than 1 but less than 5 ■ 5 or more

Figures do not add up to 100% because multiple responses were allowed
Percentages might not add up to 100 due to rounding off

Types and Number of Apps Downloaded (2/2)

Q17. What types of apps have you downloaded to your tablet or Smartphone? Approximately how many apps have you downloaded?



n=111

■ 1 ■ More than 1 but less than 5 ■ 5 or more

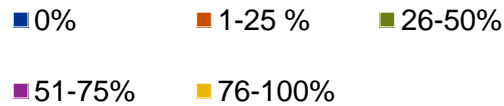
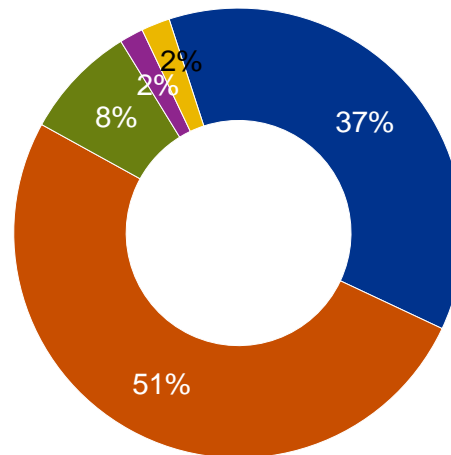
Figures do not add up to 100% because multiple responses were allowed
Percentages might not add up to 100 due to rounding off

*Low base – findings are directional in nature

Percentage of Paid Apps

Q18. What percentage of the apps you downloaded did you pay for?

Percentage of Paid Downloads



n=292

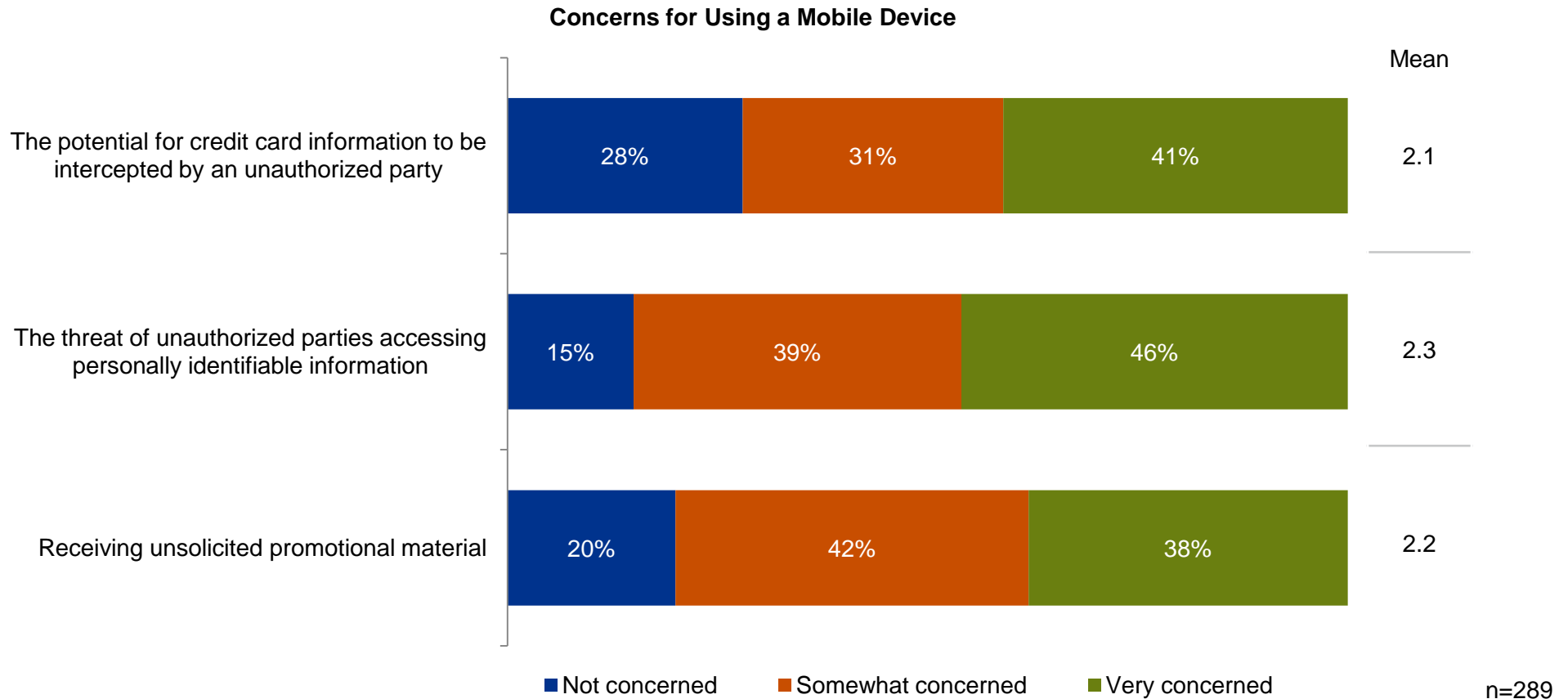
Percentages might not add up to 100 due to rounding off

Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Mobile Device Usage | Concerns

Q19. When using a mobile device, how concerned are you about each of the following? Please rate as Not concerned, Somewhat concerned or Very concerned.



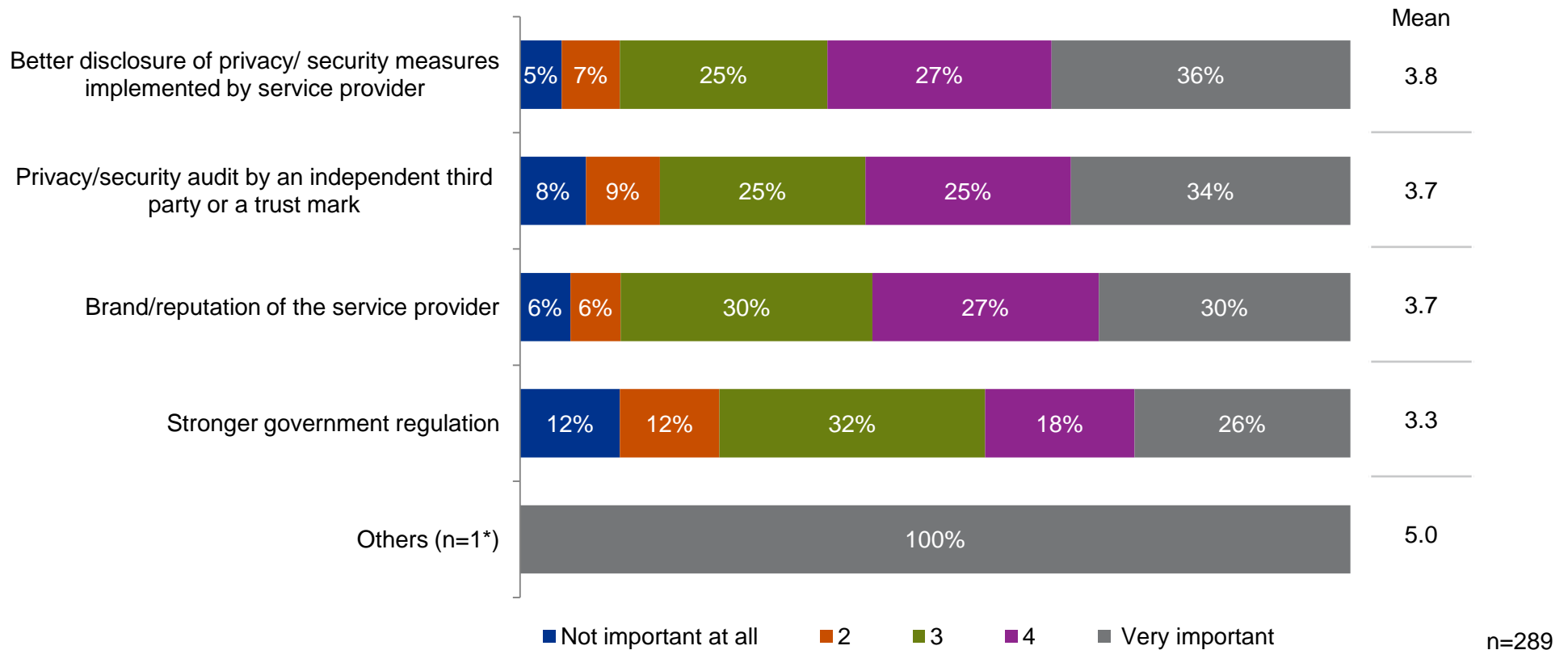
I have no data privacy/security concerns = Yes (4%) | No (96%) n=300

Percentages might not add up to 100 due to rounding off

Data Privacy and Security | Trust Gaining Factors

Q20. How important are each of the following in gaining your trust in relation to data privacy and security? Please rate each using a 1-5 scale where 1=not important at all and 5=very important.

Importance of Factors in Gaining Trust with Respect to Data Privacy & Security

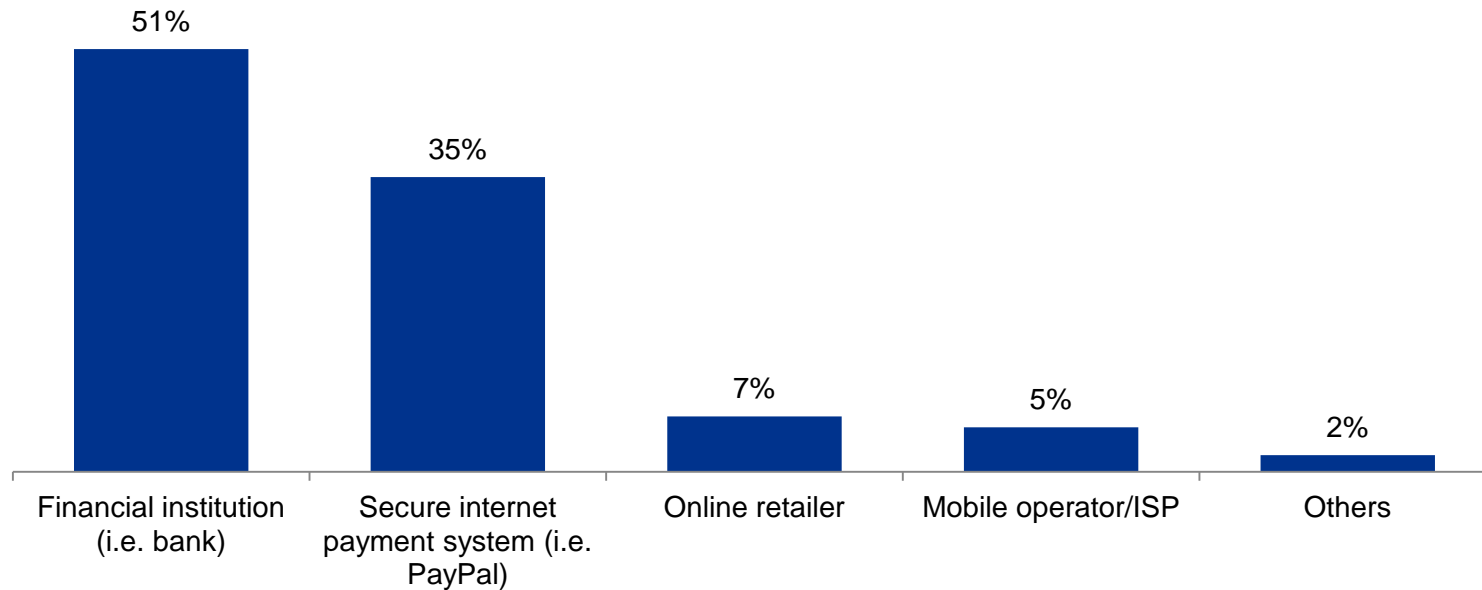


**Low base – findings are directional in nature
Percentages might not add up to 100 due to rounding off*

Online Purchase | Trusted Institutions

Q21. When making online purchases, who do you trust most to keep your personal and financial data secure?

Trusted Areas in Online Purchase



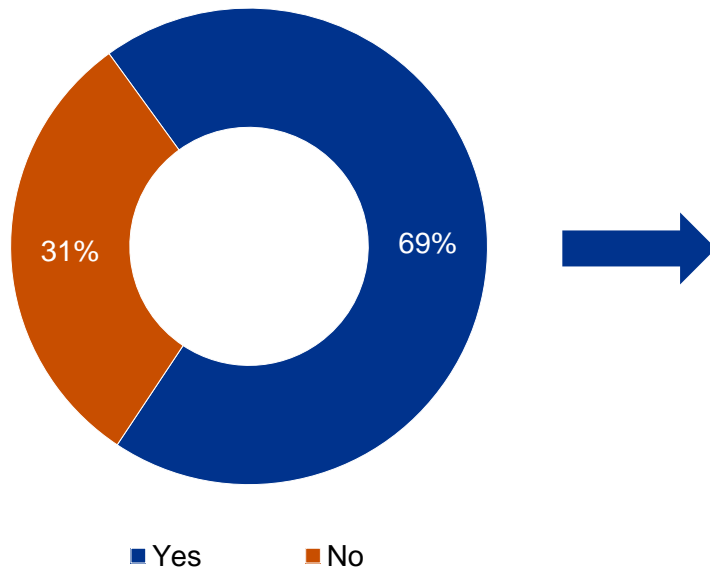
n=300

Percentages might not add up to 100 due to rounding off

Personal Information | Storage and Device Usage

Q22. Do you store your personal information such as emails, documents, photos and music on the web (for example, on social networking sites, photo management or sharing sites, web-based email providers)?

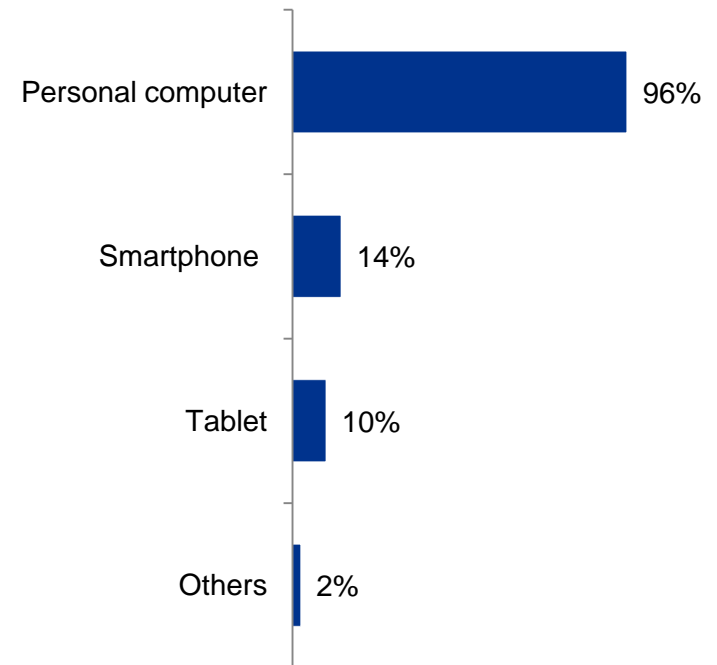
Personal Information Stored on Web



n=300

Q23. What device do you use the most frequently to access web-based services?

Device Used for Accessing Web-based Services

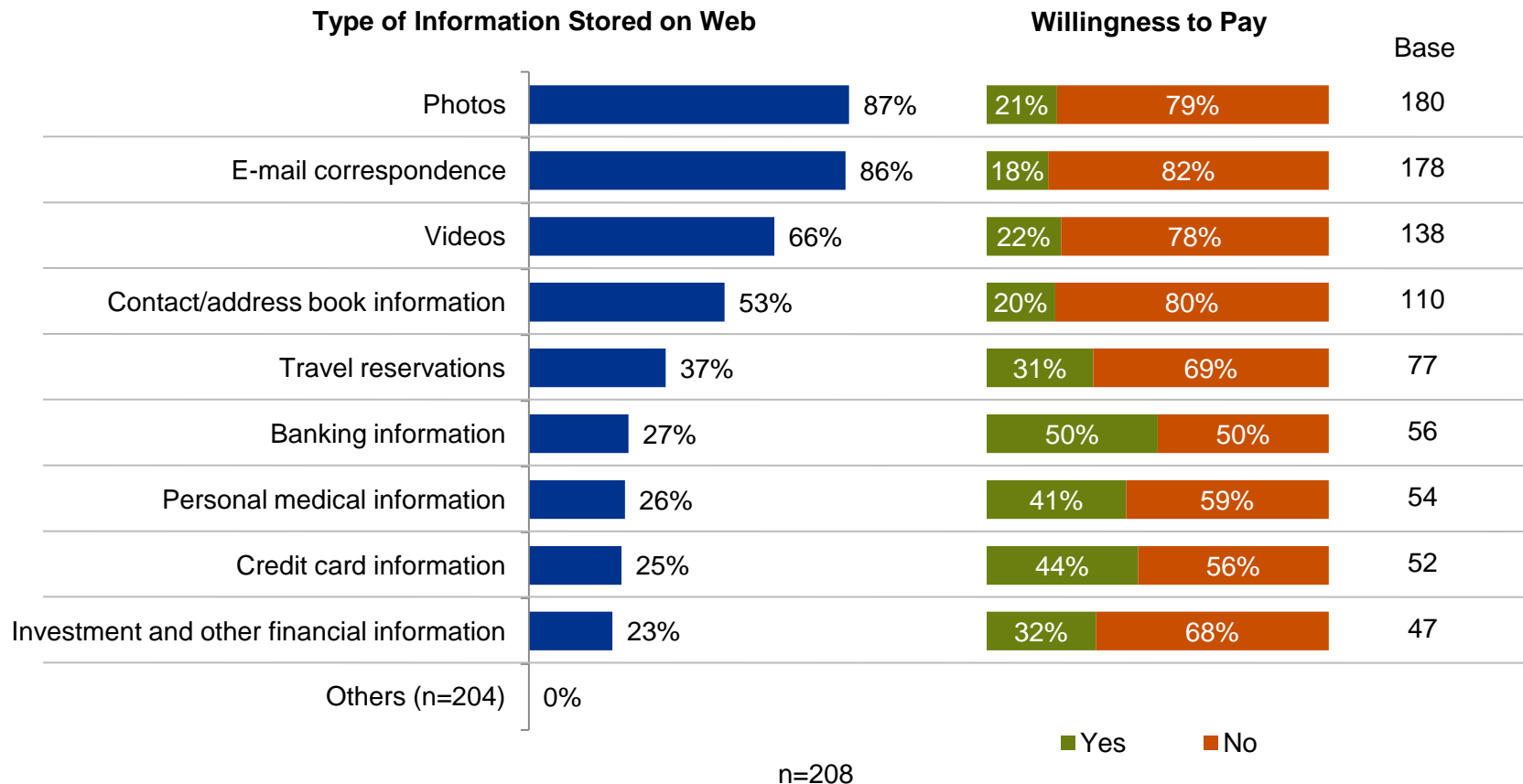


n=208

*Percentages might not add up to 100 due to rounding off
Figures do not add up to 100% because multiple responses were allowed*

Information Type Stored on the Web and Willingness to Pay

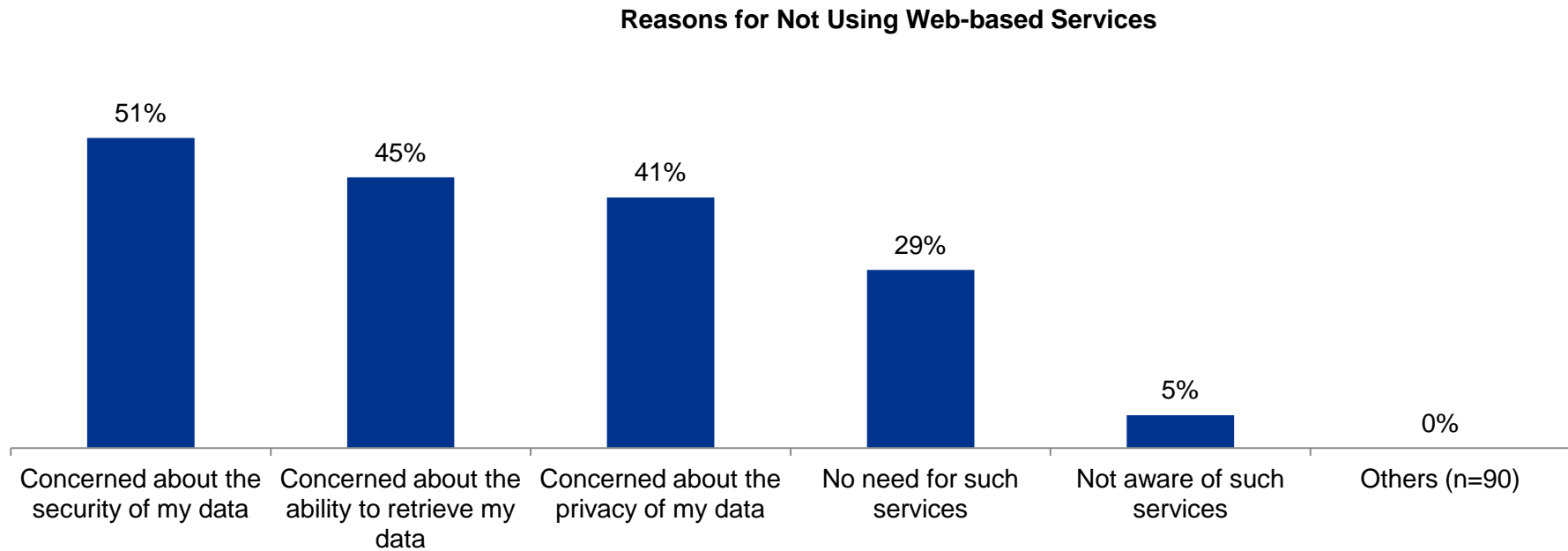
Q24. What type of information would you be prepared to store on the web (e.g. on the server of the service provider)? And would you be willing to pay for such a service?



*Figures do not add up to 100% because multiple responses were allowed
Percentages might not add up to 100 due to rounding off*

Reasons for Not Using Web-based Services

Q25. What is the main reason you do not use web-based services?



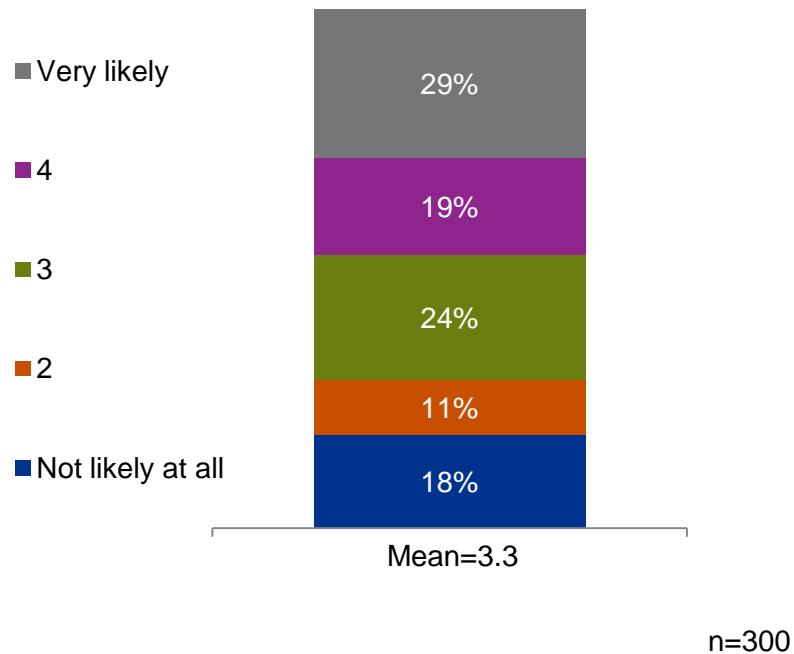
n=92

Figures do not add up to 100% because multiple responses were allowed

Personal Information | Likelihood of Storing on Web & Medical Information Access on Mobile Device

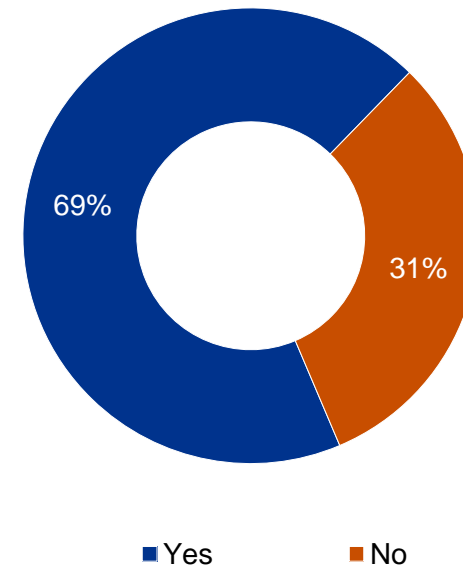
Q26. In the future, how likely would you be to store your personal information such as emails, documents, photos and music on the web - for example on social networking sites, photo management or sharing sites, web-based email providers?

Likelihood of Storing Personal Information on Web



Q27. Would you like to be able to access your personal medical information on your mobile device?

Preference for Medical Information on Mobile



n=300

Percentages might not add up to 100 due to rounding off

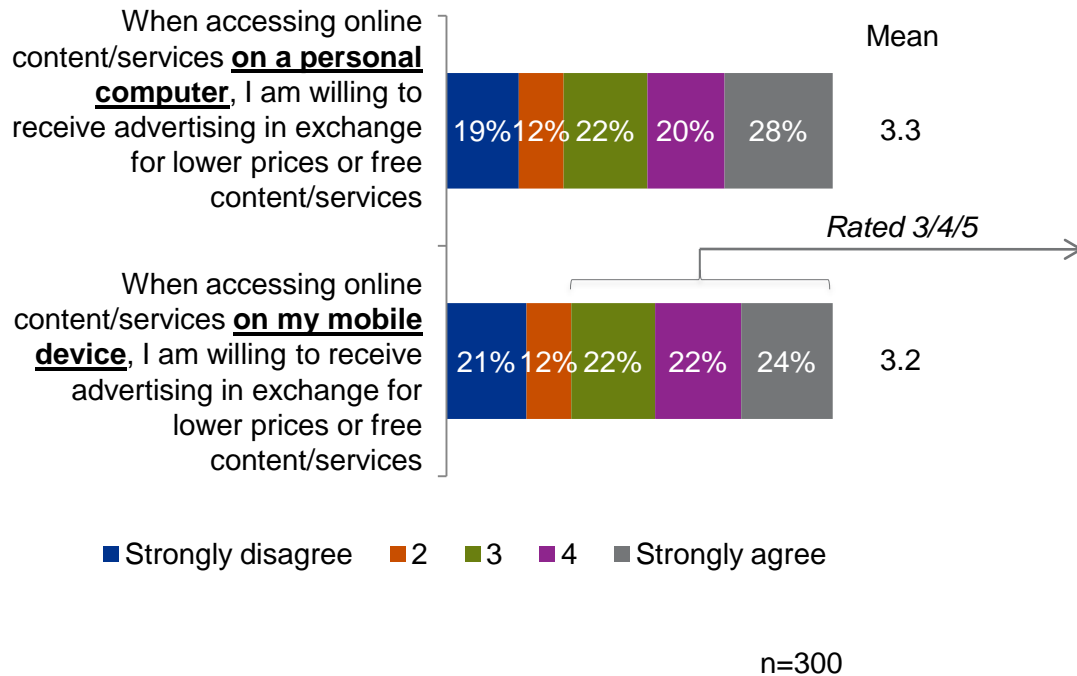
Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Advertising | Online and Mobile

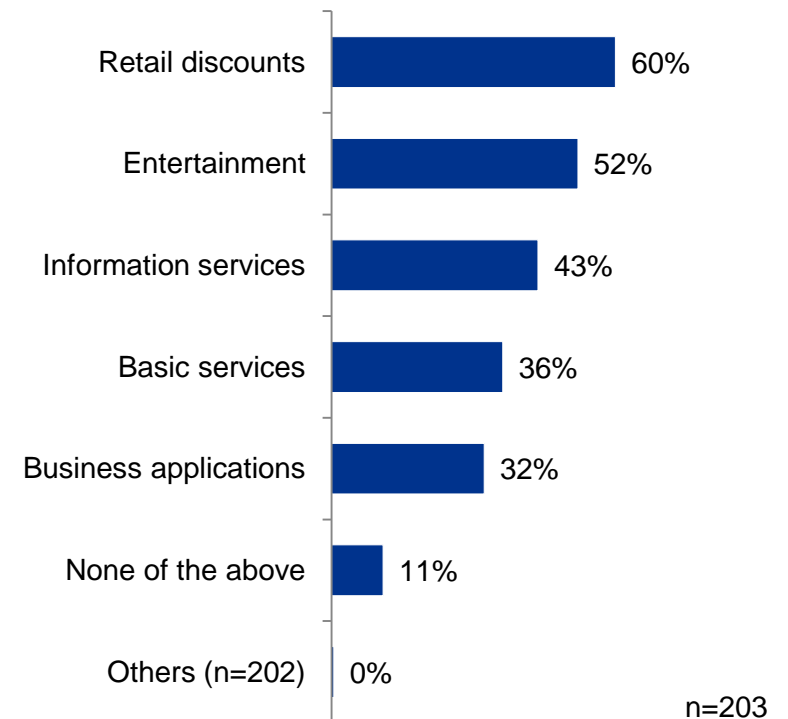
Q28. Please rate your level of agreement with the following statements on a scale of 1-5, where 1 means “strongly disagree” and 5 means “strongly agree”.

Personal Computer vs. Mobile Device



Q29. I would be willing to receive advertising on my mobile device for cheaper/free.

Willingness to Receive Advertising on Mobile Device

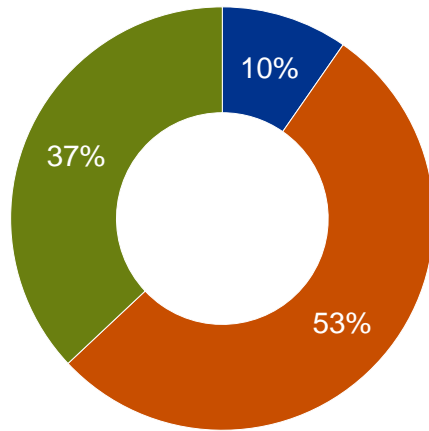


*Percentages might not add up to 100 due to rounding off
 Figures do not add up to 100% because multiple responses were allowed*

Advertising | Preference and Degree of Willingness to be Tracked

Q30. What advertising do you prefer to receive on your mobile device or personal computer?

Advertisement Preference on Mobile/Personal Computer

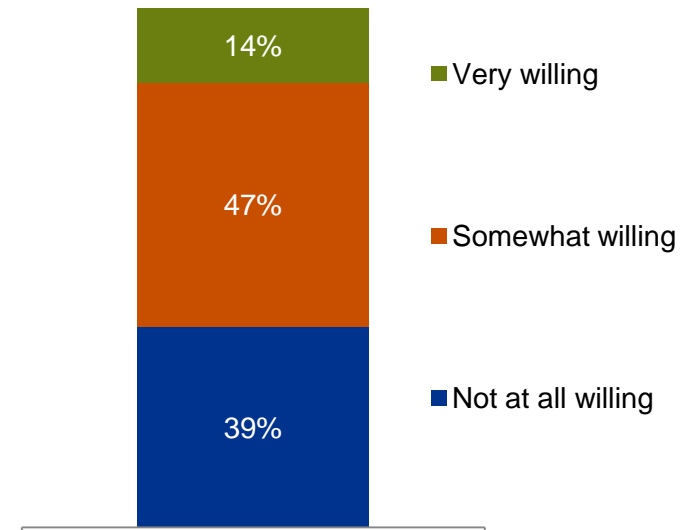


- Generic advertising
- Advertising tailored to your interest and activities
- I don't want to see any advertising

n=300

Q31. How willing are you to allow your online usage pattern and personal profile information to be tracked for advertisers if this results in lower costs or free contents?

Willingness to be Tracked for Advertising



- Very willing
- Somewhat willing
- Not at all willing

n=300

Percentages might not add up to 100 due to rounding off

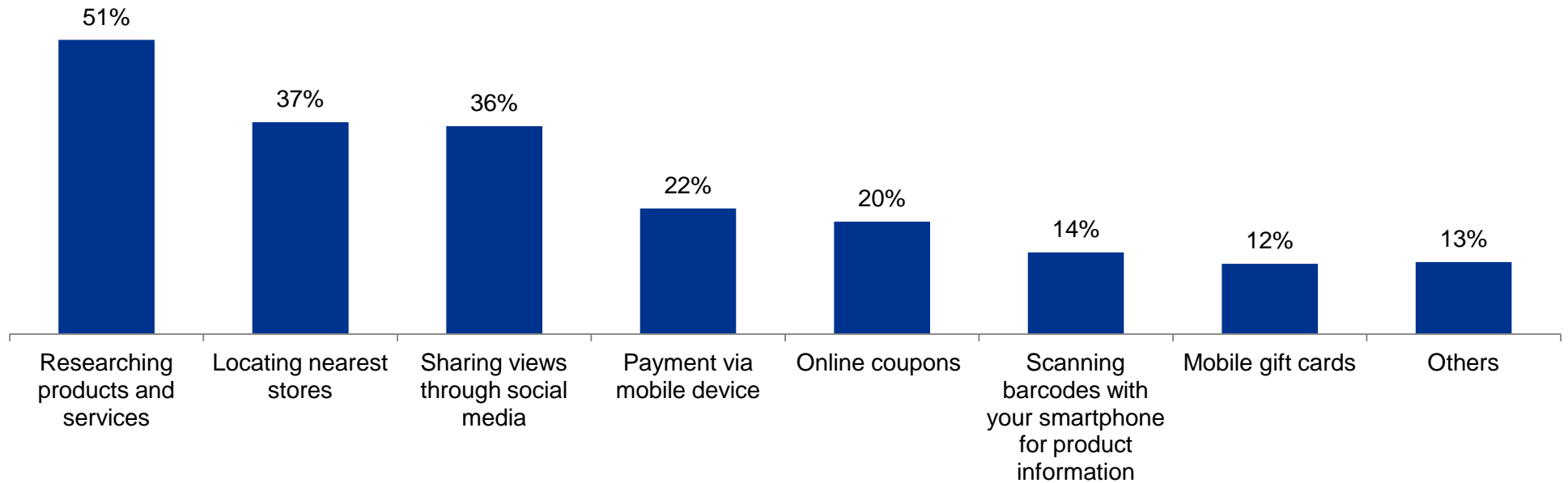
Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Retail Outlets | Services Used on Smartphone or Tablet

Q32. When shopping at retail outlets, which of the following services have you used on your smartphone or tablet?

Services Used on Smartphone/Tablet while Shopping at Retail Outlets

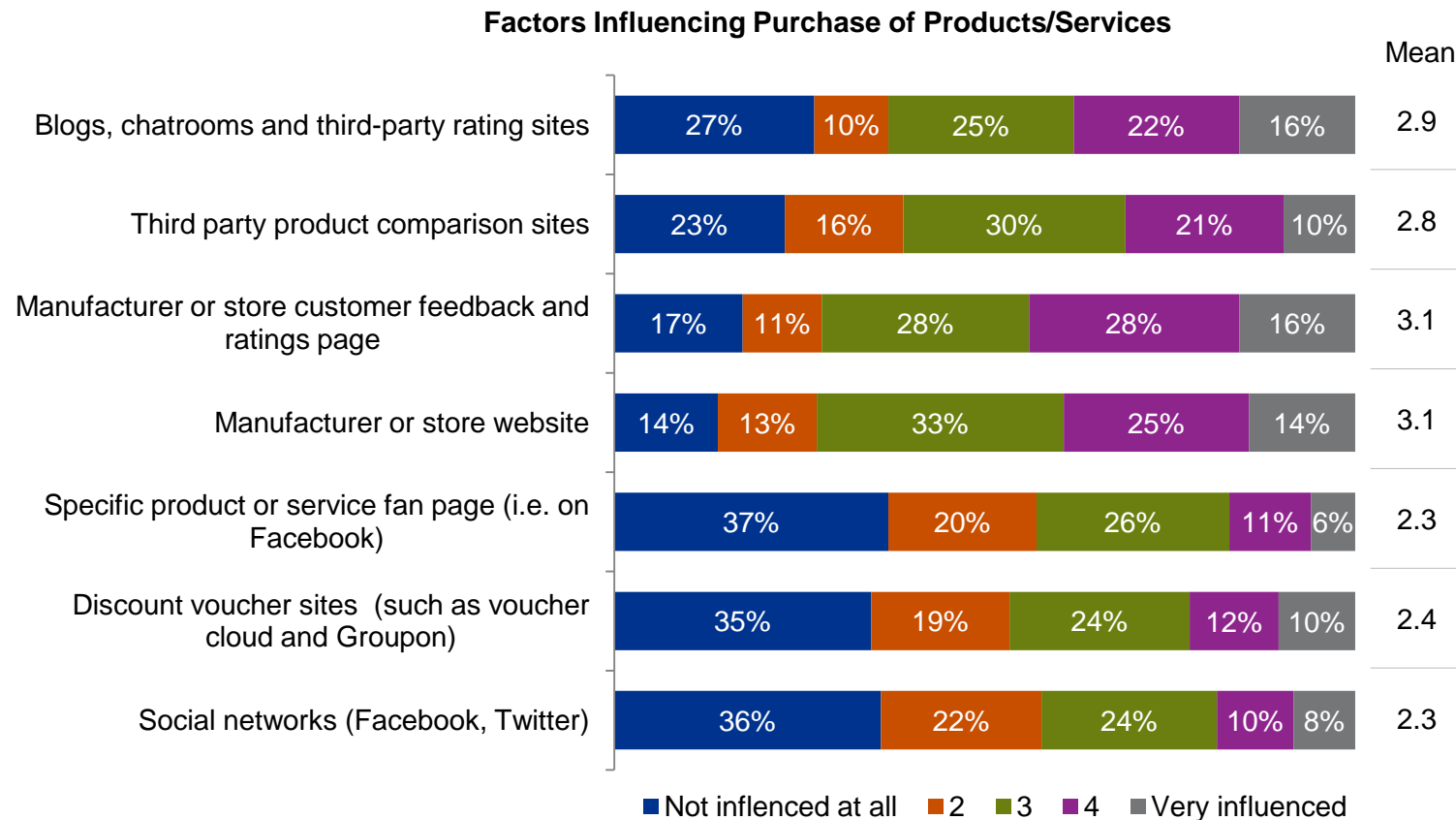


n=300

Figures do not add up to 100% because multiple responses were allowed

Factors Influencing Shopping Pattern of Products/Services

Q33. When buying products or services, how influenced are you by each of the following? Please rate on a 1-5 scale where 1=not influenced at all and 5=very influenced.



n=300

Percentages might not add up to 100 due to rounding off

Shopping Pattern | Online vs. Stores

Q34. How likely are you to buy each of the following online rather than in a store? Please rate on a scale of 1 – 4 where 1 is Not likely, 2 Somewhat likely, 3 Likely, 4 Very Likely.

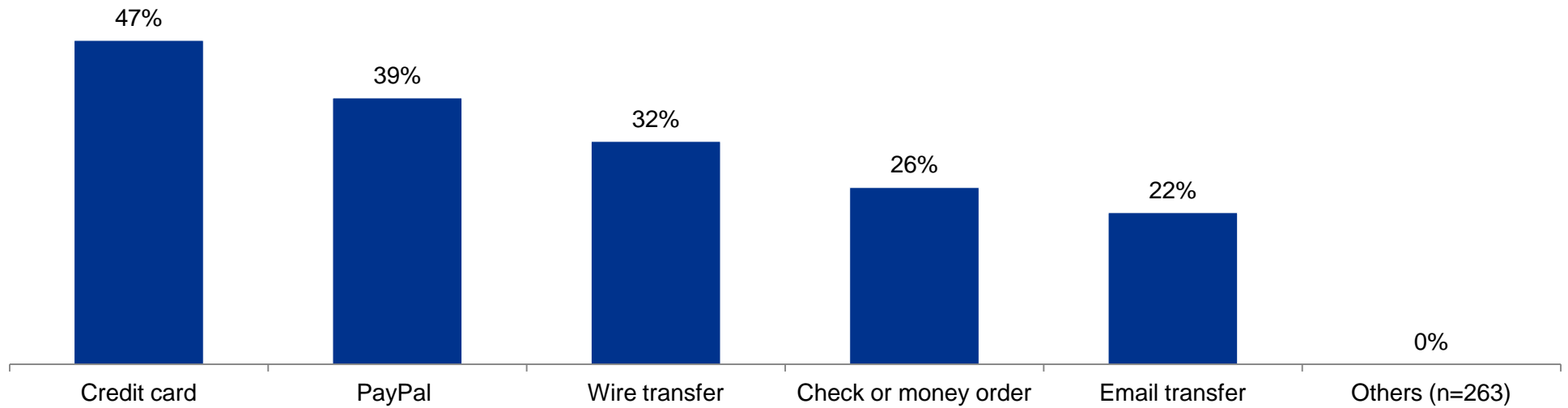


Percentages might not add up to 100 due to rounding off

Online Transactions | Preferred Method of Payment

Q35. When making purchases online, what is your preferred method of payment?

Preferred Method of Payment for Online Transactions



n=300

Figures do not add up to 100% because multiple responses were allowed

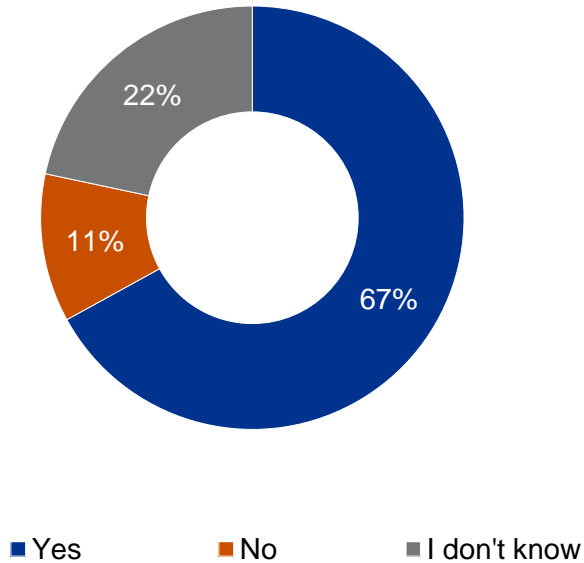
Contents

	Slide
1. Demographics	[02]
2. Staying Connected	[06]
3. TV and Movie Viewing Habits	[11]
4. Content	[15]
5. Apps	[21]
6. Security/Privacy	[25]
7. Online and Mobile Advertising	[33]
8. Shopping Preferences	[36]
9. Payments and Banking	[41]

Banking Through Mobile Devices

Q36. Does your current bank offer banking through mobile devices?

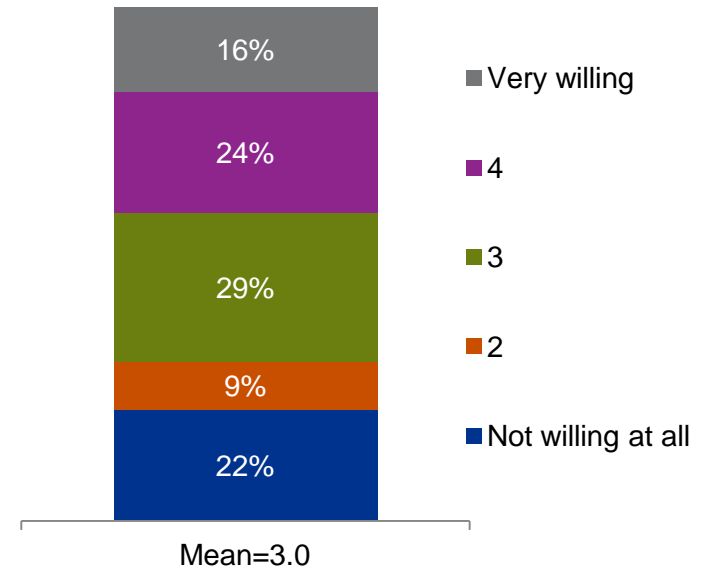
Current Bank Offering Mobile Banking



n=300

Q38. How willing would you be to use your mobile phone as a wallet? Please rate your preparedness level on a 1-5 scale where 1=Not willing at all and 5=Very willing.

Willingness to Use Mobile Phone as a Wallet

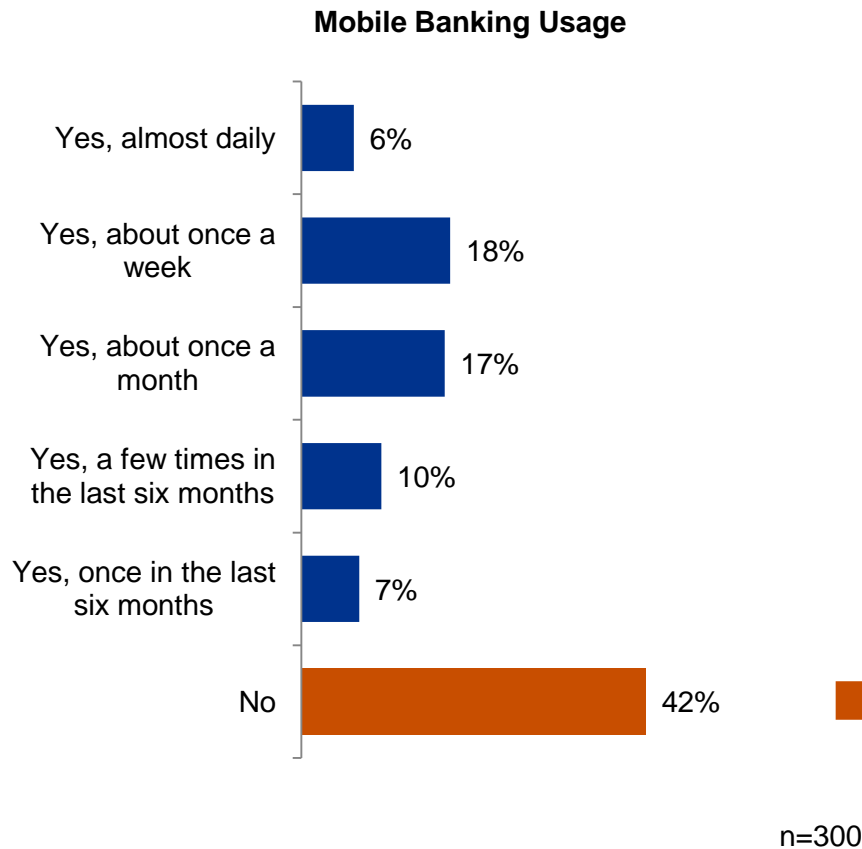


n=300

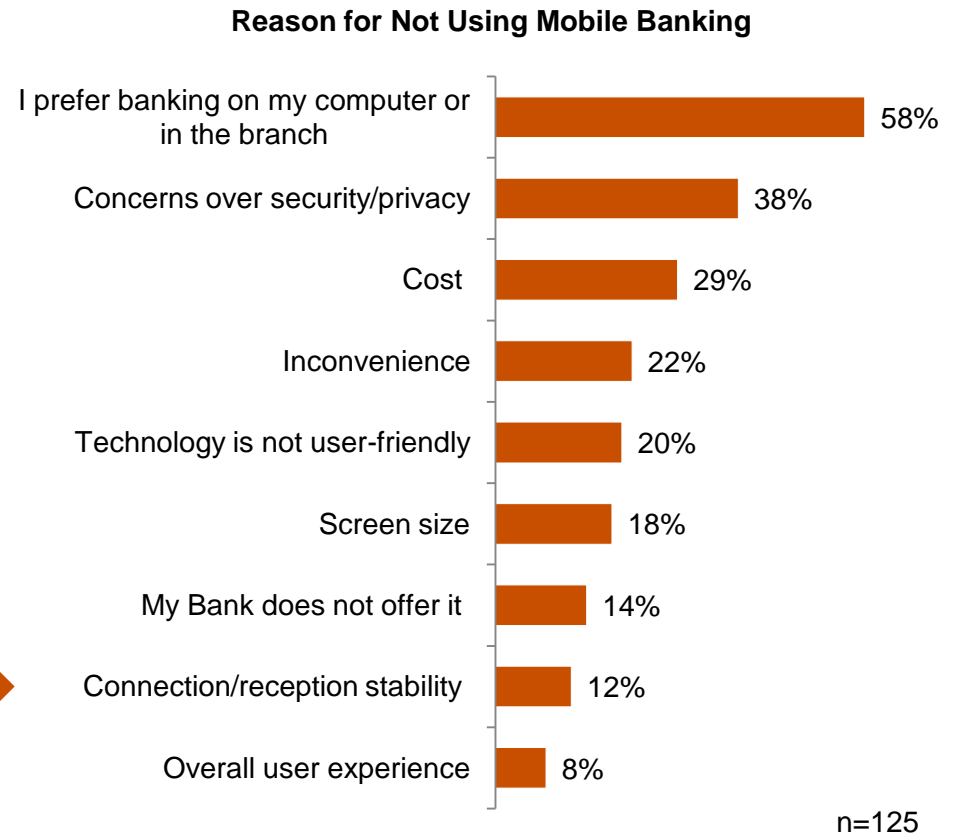
Percentages might not add up to 100 due to rounding off

Mobile Banking | Usage

Q37. Have you used mobile banking in the last six months?



Q39. What is the main reason you have not conducted any banking through a mobile device in the past six months?



Percentages might not add up to 100 due to rounding off
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Thank You



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