

OPINION MONITORING: MAY—JUNE 2022

VCIOM-Sputnik daily survey results. The survey method is stratified dual-frame sample consisting of telephone interviews. The sample is based on a complete list of landline and mobile phone numbers operating in Russia and involves 1,600 persons aged 18 and older. The data were weighted for the probability of selection and reflect social and demographic characteristics. The margin of error at a 95% confidence level does not exceed 2.5%. In addition to sampling error, minor changes in question wording and different circumstances arising during the fieldwork can introduce bias into the survey.

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SOCIAL AND ECONOMIC PROBLEMS**TO SAVE OR TO SPEND?****IMPORT SUBSTITUTION: FEARS AND HOPES****TO SAVE OR TO SPEND?**

May 21, 2022

The share of supporters of the saving patterns has been relatively stable over the past year, and significant changes in savings behavior are recorded only in comparison with 2020. In May 2022, two-thirds of Russians answered that now it is better to spend as little as possible, trying to save as much as possible for the future (63% of respondents share this opinion, in May 2021 – 62%, in May 2020 – 81%). A quarter of respondents consider it reasonable to spend their salary or pension as soon as possible (24%, May 2021 – 26%, May 2020 – 12%). Thus, the Index of Savings Behavior amounted to 66 points, which is generally in line with the May values of previous years – except for 2020, when it reached its maximum of 78 points. The respondents are even more pessimistic regarding lending. Currently, most of our compatriots are not considering the possibility of obtaining bank loans (such an opinion was stated by 81% of respondents in May 2022, and by 70% – in May 2021). 6% consider the current time favorable for taking loans, while at the beginning of 2022 this share was twice as high (January 2022 – 12%). The Credit Confidence Index reached 20 points in May. Last year, this indicator was in the range of 25–28 points and showed a slight decrease in early 2022 (24 points in January 2022), subsequently reaching its minimum in March–April (18 points). Russians can hardly call the current time favorable for making large purchases: according to 70% of the respondents, now is not the right time to buy anything expensive (+16 points compared to May 2021). 13% are convinced of the opposite and consider the current time to be good for large purchases; last May this share was two times higher (26% in May 2021). For the past three months, the Consumer Confidence Index has been at an unprecedentedly low level – in May 2022 it amounted to 27 points, and in March–April 2022 it averaged at 26 points. Closest values to the described above were recorded during the pandemic in May 2020, when this index levelled at 31 points, and 66% of respondents called this time bad for purchasing valuable things.

Fig. 1. Bank Deposit Confidence Index for bank deposits¹ (2015–2022)

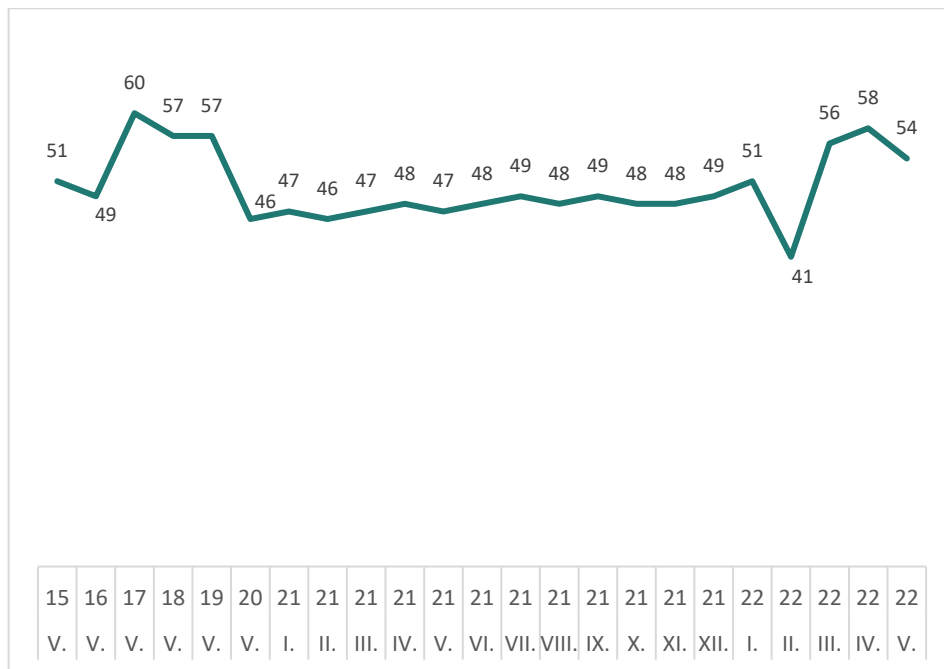
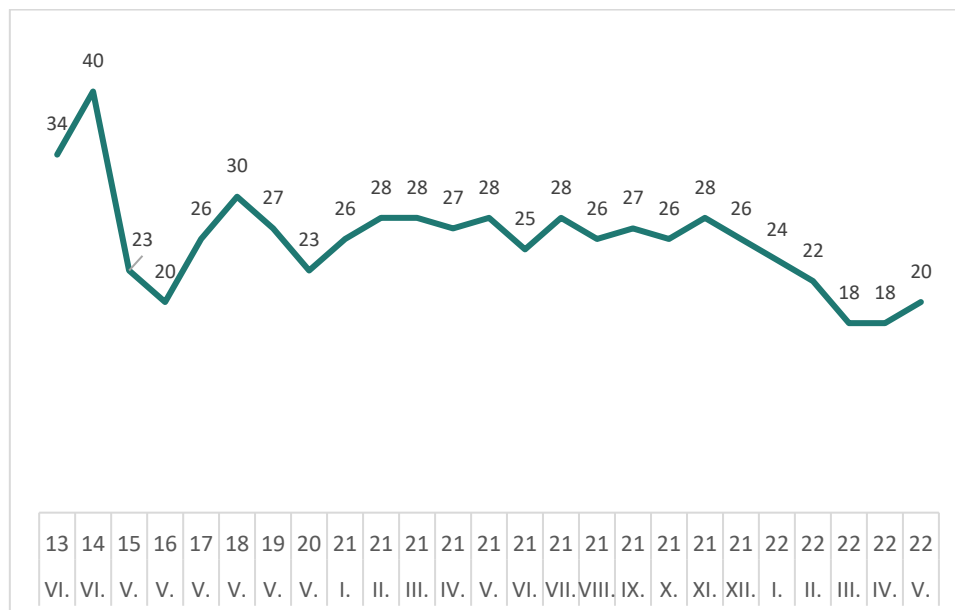


Fig. 2. Credit Confidence Index² (2013–2022)



¹ The Bank Deposit Confidence Index shows how favorable the current time is for Russians to make deposits. The index is built on the basis of the question “Do you think now is the best time to make deposits in banks, or to withdraw money from banks?”. The answer “Now it’s better to put extra money in the bank” is assigned a coefficient of 0.9, the answer “Now, if there is money in the bank, it’s better to take it away” – 0.1, “Don’t know” – 0.5. The index is measured in points and can range from 10 to 90. The higher the index value, the more favorable the Russians consider the current moment for making a bank deposit.

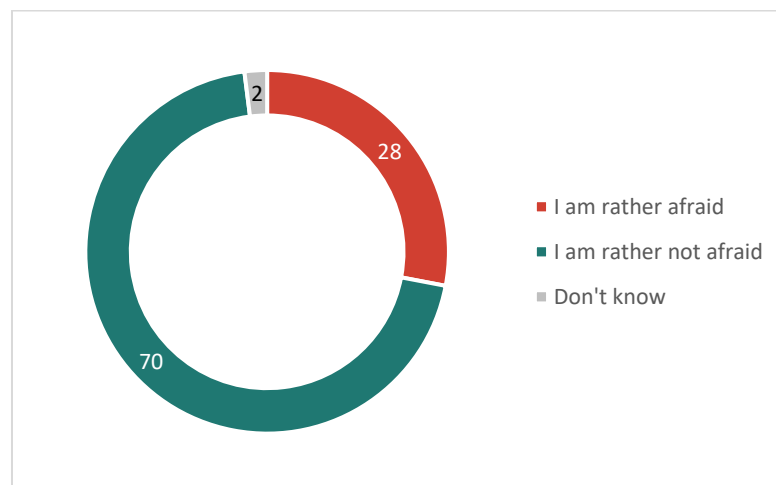
² The Credit Confidence Index shows how favorable the Russians consider the current time for lending. The index is built on the basis of the question: “Do you think now is a good time to take loans, or not?”. The answer “Rather good” is assigned a coefficient of 0.9, the answer “Rather bad” – 0.1, “Don’t know” – 0.5. The index is measured in points and can range from 10 to 90. The higher the index value, the more favorable the Russians consider the current moment for taking a loan.

IMPORT SUBSTITUTION: FEARS AND HOPES³

May 24, 2022

70% of Russians are not afraid of the emergence of a mass shortage of goods, 28% express some concern about this. Most of the surveyed respondents believe that Russian companies will be able to replace foreign manufacturers who have recently left the market (69%); at the same time, 27% of the respondents believe that this is not the case. The overwhelming majority of Russians believe that Russian manufacturers will soon be able to replace foreign firms in the segments of food production (94%), hygiene products (91%), household chemicals (90%), building and finishing materials (86%). Slightly less often, they express an opinion about the possibility of import substitution in the production of medicines (69% vs. 24% of the respondents who believe this to be untrue), in the aviation industry (66% vs. 22%), and in the manufacture of industrial equipment (63% vs. 29%). Approximately half of the citizens believe that domestic manufacturers will be able to replace foreign medical equipment (55%), a third of respondents are sure that this is rather impossible (34%). Half of the respondents (54%) also expressed the opinion that it is possible to successfully replace foreign brands in the production of household appliances and electronics, 37% believe that Russian companies will most likely not be able to replace goods in this category. Regarding the substitution of cars and auto parts, opinions are distributed almost equally: 50% of respondents believe that Russian companies will be able to replace foreign goods of this type, 40% express the opposite opinion. When choosing products of Russian or foreign manufacturers, given that the price is equal, most survey participants are more likely to choose a domestic product (67%), 18% are more likely to choose imported goods. In the issue of quality, the Russian manufacturer also wins according to 56%; every fifth respondent considers imported products to be of better quality (22%).

Fig. 3. People differently assess the likelihood of economic problems in the country. Are you personally afraid or not afraid of a massive shortage of goods in Russia? (closed-ended question, one answer, %)



³ The All-Russian telephone survey was commissioned within a project for Expert Institute for Social Research (EISR).

Fig. 4. In your opinion, Russian companies may or may not be able to replace foreign companies that have recently left the domestic market? (closed-ended question, one answer, %)

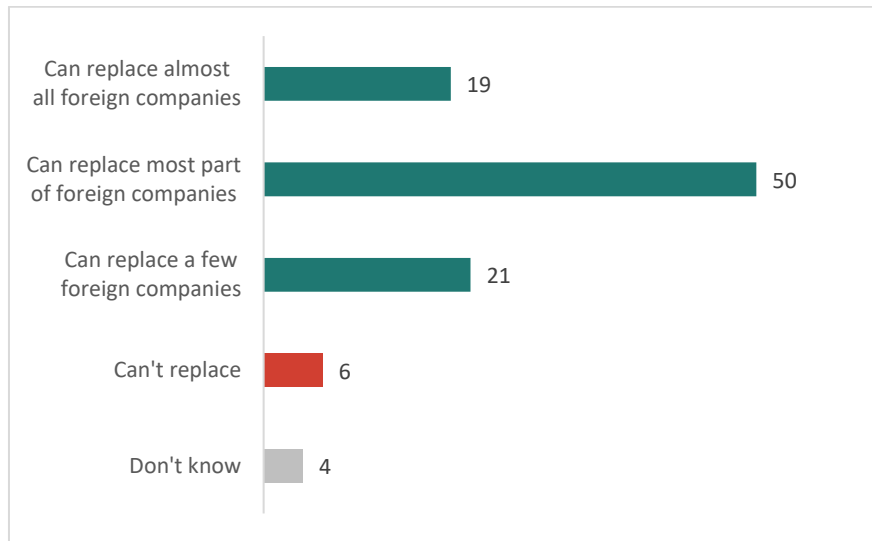
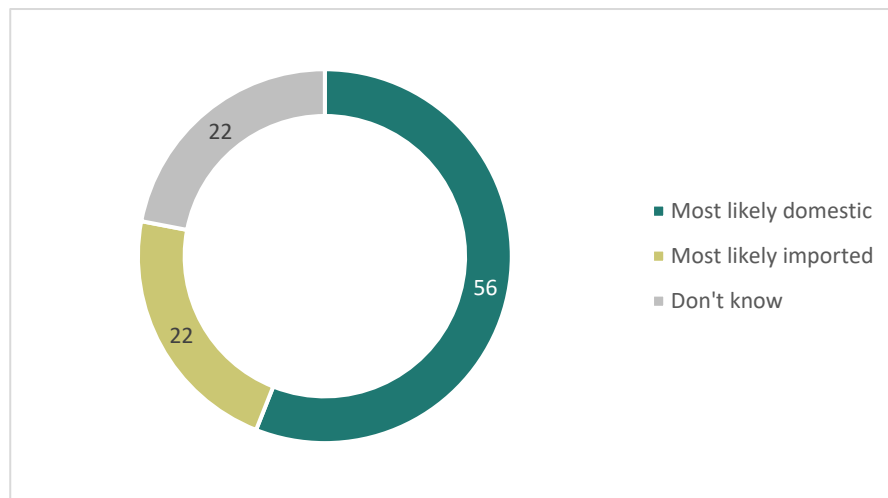


Fig. 5. In your opinion, which products are of higher quality: domestic or imported? (closed-ended question, one answer, %)



LIFESTYLE**"CANCELING" RUSSIA AND HOW TO COUNTER IT****BOOK CULTURE — 2022****KIDS IN SUMMER: AT HOME OR IN A CAMP?****“CANCELING” RUSSIA AND HOW TO COUNTER IT**

May 28, 2022

More than a third of Russians believe that such a trend will harm Russian culture to some extent (37%), this opinion is more often expressed by young people aged 18–24 years old (49%). A third of Russians believe that the “cancellation” will not affect Russian culture — “nothing will change” (33%), and 23% believe that such a situation will benefit national culture. Every second Russian is concerned about attempts made by Western countries to remove Russian culture from public space (53%). Women express this concern more often (57%); this also applies to pensioners (58%) and those who prefer TV over the Internet (61%). 43% of citizens do not express concern about the “cancellation” of culture abroad, while a quarter of respondents are not worried about the current situation at all (25%). Russians more often express the position that their rights in the cultural sphere must be protected: first, it is necessary to attract attention to the protection of Russian culture in the media (30%) and among Western opinion leaders (20%), and second, to create associations in defense of Russian culture (16%), conduct information campaigns (14%). To a lesser extent, our compatriots see petitions (9%) and filing lawsuits with the courts (12%) as effective countermeasures. According to the respondents, it is possible to change the policy of cultural “cancellation” with the help of public response and public discussion of the problem by Western society. Three quarters of the respondents believe that it is not necessary to introduce similar measures in response and “cancel” Western culture in Russia (73%). This opinion is more prevalent among respondents with higher education (80%) and residents of Moscow and St. Petersburg (80%). Every fifth respondent (22%) believes that it is necessary to impose sanctions against Western culture.

Fig. 1. Are you worried or not worried about the attempts of Western countries to exclude, cancel Russian culture, remove it from public space? (closed-ended question, one answer, %)

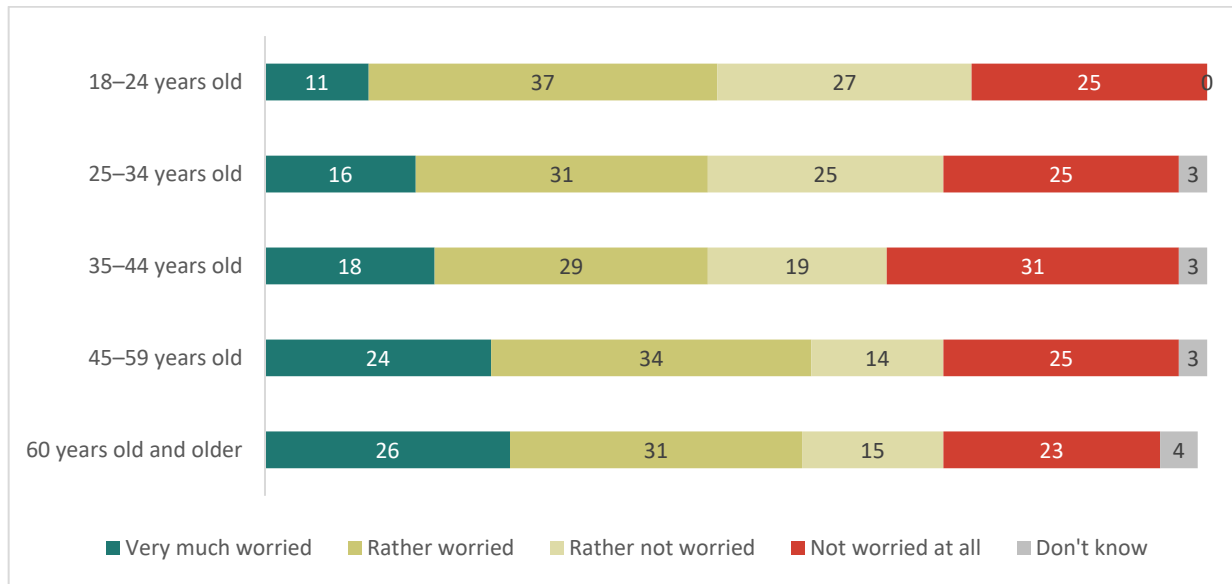
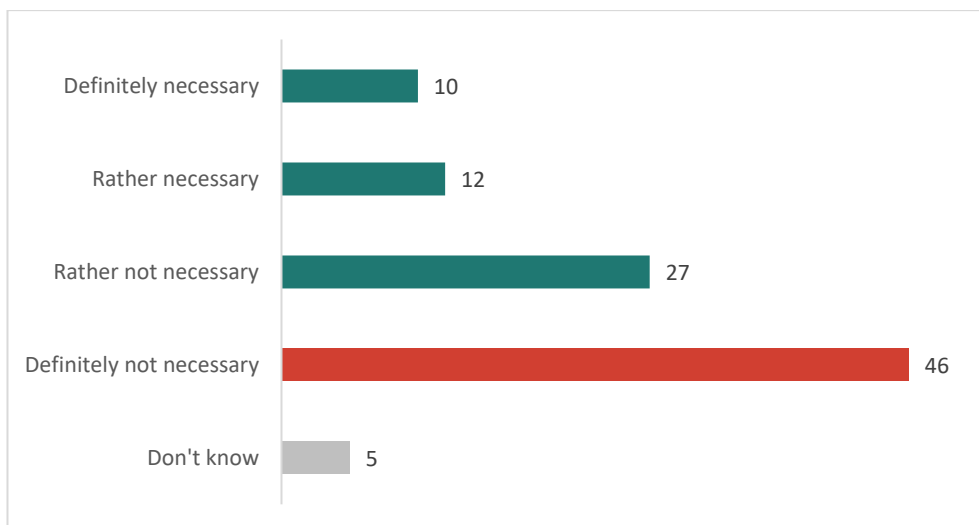


Fig. 2. In your opinion, in response to the attempts of Western countries to “cancel” Russian culture, is it necessary or not necessary to pursue a similar policy of “cancelling” Western culture in our country? (closed-ended question, one answer, %)



BOOK CULTURE – 2022

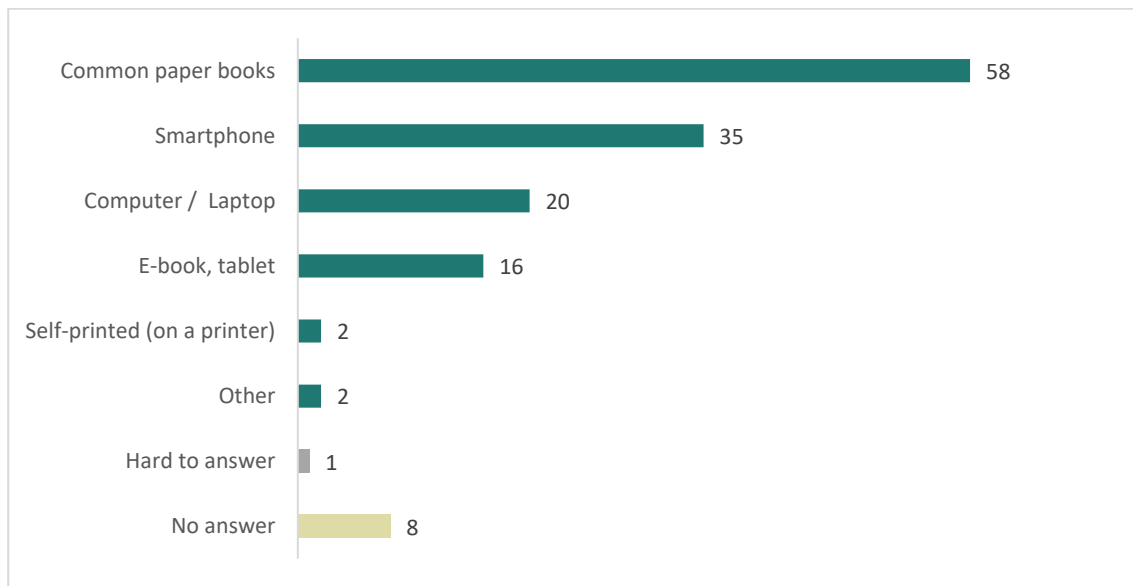
May 11–12, 2022

92% of respondents today say they read books. The share of non-readers is the highest among the respondents aged 25–34 years old (13%). Reading books correlates with the level of education: among those with higher education 4% do not read books, while among respondents with secondary education 13% fall into this group, and among respondents with incomplete secondary education this proportion goes up to 27%. Watching TV daily also appears to leave less time for reading, with daily TV viewers having lower reading activity (90%) than those who watch TV several times a week or less frequently

(95%). However, these differences are minor, it is almost impossible to isolate the socio-demographic group of “leading book readers”: neither living area, nor generation or consumer status determine the reader's profile. In many ways, this is a consequence of the globalization of the information space; reading practices have changed. Despite the prevalence of electronic formats, printed books do not lose their popularity, which is also confirmed by the survey data – 58% of the respondents reported that they read paper books this spring. Next comes the smartphone – every third respondent (35%) read from the smartphone screen. Another 20% read from a computer screen. E-books are popular with 16% of our compatriots. In total, 71% read books from screens. At the same time, people usually do not have a single way of reading; rather, the survey reveals the habit of combining several convenient options. The reading strategy “paper book and smartphone” remains the most popular in all age groups, except for the older one, where “paper book and computer” dominates over all others. Analysis shows that there is no reason to believe that digital books will replace paper ones any time soon.

The modern reader considers all genres of literature but prefers fiction (61% of the respondents). The top 5 also include special professional literature (33%), popular science books (31%), philosophical literature, and cooking books (12% each). The differentiation of genre and thematic preferences is especially pronounced by gender, age, and education, and to a lesser extent, by consumer status and area of living. Interestingly, genre preferences are associated with television viewing. Regular TV viewers are more likely to read fiction (64%) and cooking books (16%), while those who do not watch TV are more likely to choose professional literature (40%), non-fiction (36%), or philosophical literature (19%), that is, literature focused on self-development and learning. While the ways of reading books change, the time of reading remains unchanged – most respondents read at times of leisure (67%). No more than 10% devote time to books at work or study, 8% like to read in transport. Reading in transport is noticeably more common practice in Moscow and St. Petersburg (25% of respondents living in these cities chose this option), which is easily explained by the duration and intensity of trips. This behavior is more prevalent among those who use for reading their smartphones (14%). Leisure reading is more popular among pensioners (78%) and those who read paper (77%) or e-books (76%). E-book readers are noticeably more likely to use reading for self-development (80%). This indicates that the e-book does not compete with the smartphone reading – these types of behavior refer to different audiences and different use cases.

Fig. 3. In what medium did you read books this spring, starting from March 1st? You can pick up to 2 answers (closed-ended question, two answers, %)



KIDS IN SUMMER: AT HOME OR IN A CAMP?

June 7, 2022

Organization of children's leisure is an urgent issue for any parent. Summer shifts in children's camps have already begun, and this year every fifth parent sent or plans to send a child to a camp (19% among those with children or grandchildren aged 6–18). Of these, 15% are planning their children's trips to the camps in the coming months, which is almost three times higher compared to 2020 (6%), while 4% have already sent their kids there. 76% do not plan such a trip for their children, which is 12 percentage points less than two years earlier (in 2020 – 88%). Generally, the demand for camp holidays remains rather stable: every fifth parent reported that they sent at least one of their children there in the last two or three years (19%, 2020 – 22%), while the remaining 80% said they didn't (in 2020 – 78%). The recovery in demand for recreation in the children's camps is associated with an improvement in the epidemiological situation in the country. The risk of contracting coronavirus no longer tops the rating of parental fears: in 2020, half of Russians believed that when organizing outdoor children's holidays, they should be wary of the COVID-19 epidemic (47%), and today only 7% of the respondents named this concern. According to the results of the survey, this summer, parents will be primarily concerned about the quality of nutrition in children's camps and the risk of food poisoning (15%), the same proportion of the respondents named the protection of the camp and the safety of recreation (15%). According to every tenth respondent, parents may be concerned about the risk of spreading viruses and infections among vacationers (10%). Russians think that parents will worry about the lack of discipline and control over their children (9%), the irresponsibility of counselors (7%), and about the life and health of their children in general (7%).

Fig. 4. Are you planning to send your child (grandchild) / children, or at least one of your children, to a summer camp this year (except for camps organized on the territory of the schools where he / she / they study)? (closed-ended question, one answer, % of those who have children / grandchildren aged 6–18 years old)

