

OPINION MONITORING: MAY—JUNE 2023

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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POLITICS

NATIONAL GOALS OF RUSSIA: RESULTS OF 2023

NATIONAL GOALS OF RUSSIA: RESULTS OF 2023

November 22–24, 2023

According to the survey results, the priority goal of the state, even in conditions of historically low unemployment, remains the promotion of employment; the people's rating of the national goals' importance was again topped by the position “decent and effective work and successful entrepreneurship” (average importance index¹ 84.0 points out of 100, +2.4 points compared to June 2021). Next, with a minimal margin from the leader, comes a comfortable and safe living environment (83.5 points). In November 2023, the distance between the assessments of the two specified development goals reached its minimum since the beginning of measurements. The average calculated index for two more strategic goals, “opportunities for self-realization and development of talents” and “preservation of the population, health and well-being of people” amounted to 82.0 and 80.8 points, respectively. The implementation of digital transformation programs is still seen by Russians as the least important development goal (76.7 points).

Public assessments of the importance of certain issues within the national goals framework also remain unchanged. According to the results of the survey held in November 2023, the top 5 most significant issues included:

- increase in population income, including pensions (estimated importance index equals to 94.8 points);
- improving the quality of general education (93.8 points);
- identification, support and development of talents and abilities in children and youth (91.6 points);
- maintaining stability of the country's economic growth rate (90.9 points);
- reduction poverty (90.4 points).

Over the past two months, the issues of state housing policy implemented within the framework of the national goal of “a comfortable and safe living environment” have gained greater relevance. These issues are the opportunity to improve one's living conditions (importance index reached 75.2 points, +2.8 points compared to the previous survey) and the availability of purchasing new housing using mortgage loan funds (63.1 points, +1.6 points compared to the previous survey).

Although “decent and effective work and successful entrepreneurship” remains the most significant goal for Russians, the growth in assessments of importance in its individual components has slowed, and for some of them has even shown a decline compared to September 2023. In particular, the survey reveals a decrease in the importance of export of Russian goods (–2.2 points) and of the number of small and medium-sized enterprises (–0.9 points).

¹ The importance index for each goal is calculated based on the following formula: % of answers received to the question “How important is it for you and your family?” multiplied by the corresponding weight: “very important” — 1, “rather important” — 0.75, “rather not important” — 0.25, “not at all important” — 0, “don't know” — 0.5. The index ranges from 0 to 100 points. The higher it is, the higher the importance of a particular indicator. The use of indices is intended to simplify the perception and tracking of indicators over time.

The performance indicators for achieving national goals are somewhat lower than the indicators of their importance. In other words, the effectiveness of the state's work on them does not yet fully correspond to public expectations. Most successfully, according to the respondents, the state manages to work on digital transformation; the average index of positive changes² for this goal was 50.1 points out of a maximum of 100 (June 2023 — 49.5 points). Second place is retained by opportunities for self-realization and talent development (42.6 points), and third place — by a comfortable and safe living environment (36.1 points). Despite the importance of measures to promote employment, the average index of positive changes for the national goal “decent and effective work and successful entrepreneurship” was 30.3 points, while the preservation of the population, health and well-being of people again ranked fifth (28.7 points).

² Complex indicator: the sum of the resulting indices for each issue within the framework of five goals, divided by the number of indicators being assessed. The index of positive changes for each issue is calculated using the following formula: the resulting % of responses is multiplied by the corresponding weight: “yes, I noticed” — 1, “no, I didn't notice” — 0, “I don't know” — 0.5. The index ranges from 0 to 100 points. The higher it is, the higher the assessment of positive changes in a particular indicator.

SOCIAL AND ECONOMIC PROBLEMS

HELPING THE DISADVANTAGED: EXPECTATION AND REALITY

BANKS AND DEPOSITS

SOCIAL ELEVATORS IN RUSSIA

HELPING THE DISADVANTAGED: EXPECTATION AND REALITY

November 5, 2023

Over the past 15 years, Russians have become less likely to believe that their relatives and friends should help those in need (socially vulnerable groups or those who find themselves in difficult life situations). Although, in the view of the respondents, it is the family and friends who remain the ones who primarily care about such people today.

Russians expect assistance to socially vulnerable groups primarily from the state (73%). In total, every second believes that such people should be helped by their relatives and friends (38%) or their acquaintances / all the people around them (12%), just as often (49%) Russians place responsibility on the organized third sector: charitable foundations (35%), associations of people with experience in solving similar problems (15%), initiative civil groups (13%), religious organizations (12%). The commercial (or second) sector, represented by large companies and businessmen, was named by more than a quarter of respondents (28%).

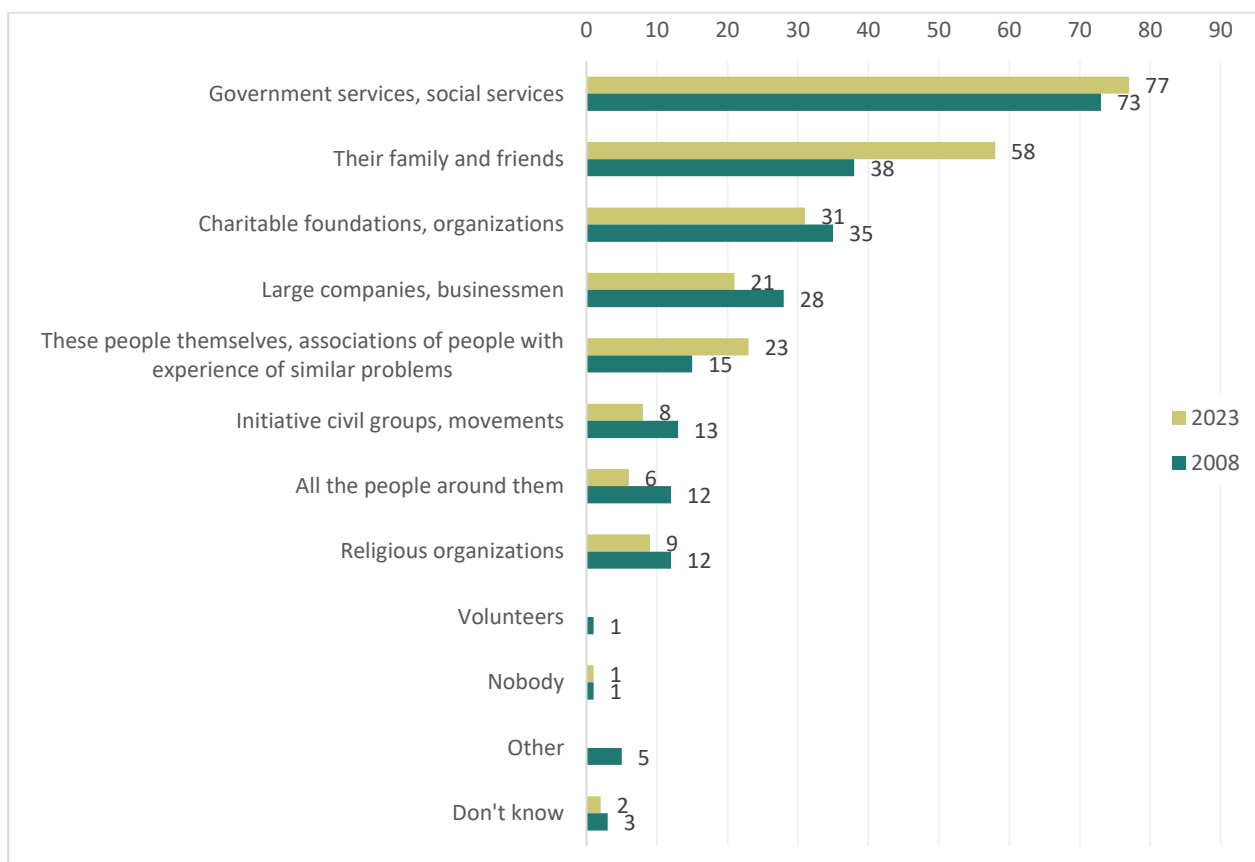
In fact, according to respondents, aid is distributed somewhat differently. Socially vulnerable citizens are more often helped by people from their social circle (56%) — family and friends (49%), acquaintances (7%). An equally involved group (53% in total) is the organized third sector — charitable foundations (35%), associations of people with similar life experiences (20%), initiative civil groups (15%), religious organizations (10%), etc. Government services from which Russians most often expect assistance to socially vulnerable citizens were named by every second person (48%). Finally, respondents are least likely to note the involvement of business in caring for the elderly, disabled, large families, etc. (8% versus 28% who expect help from them); Among those who place responsibility on business, only 14% believe that it helps the socially vulnerable.

Over the past 15 years, the views of the Russian citizens on helping socially vulnerable groups of the population have changed. Russians are less likely to expect support from their family and friends (58% in 2008 versus 38% in 2023) and from associations of people with similar experiences (23% versus 15%); At the same time, public demand for corporate social responsibility of business increased (21% versus 28%), as well as assistance from initiative civil groups (8% versus 13%).

Regarding the actual situation, over the period under review, Russians began to more often note the involvement of almost all represented actors in caring for socially vulnerable groups (with the exception of relatives and friends; -14 percentage points since 2008). In particular, the respondents note positive changes in the assistance of government services (+12 percentage points over 15 years), charitable foundations (+27 percentage points), initiative civil groups (+13 percentage points) and

religious organizations (+5 percentage points). In addition, today only 3% note the absence of any help, whereas 15 years ago the answer “nobody helps” came from every ninth person (11%).

Fig. 1. Who, in your opinion, should primarily help people who are commonly called “socially vulnerable” – the elderly, lonely old people, disabled people, large families, single mothers, orphans, hopelessly ill people? (closed-ended question, up to five answers, % of all respondents)



BANKS AND DEPOSITS

November 10, 2023

According to VCIOM survey data, since 2009, the level of trust of Russians in banks has doubled and reached its maximum. Today, almost half of respondents answered that they have trusted and trust banks today (46% in 2023; 31% in 2013; 24% in 2009), another 6% said that they began to trust banks more over the last three years. At the same time, the share of Russians who do not trust banks in principle decreased (22%; 31% in 2017; 33% in 2009), as well as the share of those who began to treat banks with less confidence in the last three years (14%; 24% in 2017; 21% in 2009). At the same time, Russians with a good financial situation trusted and trust banks twice as often as citizens with a poor financial situation (61% versus 30%).

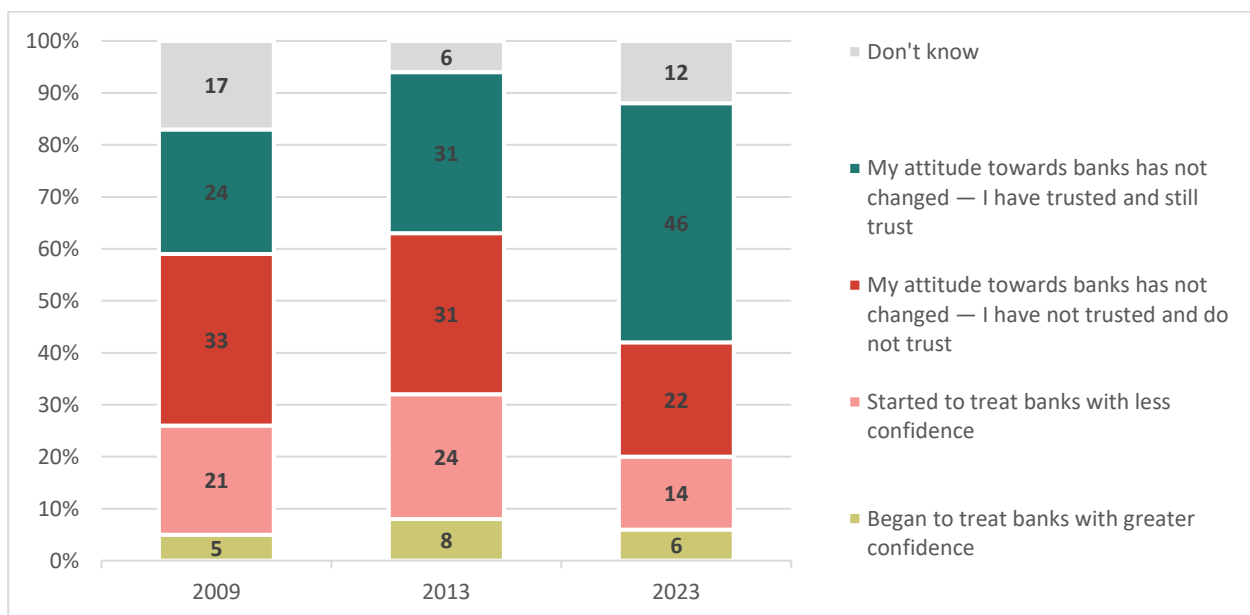
Almost every third Russian (30%) has bank deposits, this is the maximum in ten years (2013 – 28%, 2017 – 25%). However, most Russians do not have deposits (68%), and since 2017 this share has decreased by 6 percentage points (2017 – 74%).

The massive loss of deposits by citizens of the USSR in 1991 left its mark on the attitude towards the banking system. Every third investor today still feels fear for the safety of their savings (35%), but this group is smaller than in 2013 (38%) and 2017 (42%). Six out of ten Russians with deposits noted

that they are not afraid of losing money in their accounts (60%, 57% in 2013 and 2017). Women are more likely to worry about the safety of their deposits (39% versus 30% among men), as well as investors aged 25-34 (50%) and investors with a poor financial situation (47% versus 20% in the group with a good one).

Investors who are afraid of losing money in their accounts most often do nothing to avoid such a scenario (38%); anxiety does not affect their actions. Every tenth person noted that they choose a reliable bank to protect their deposits (10%). Specific financial protection mechanisms include storing money in several banks (9%), investing in real estate (6%), as well as metals, cryptocurrencies, stocks, and foreign currencies (6%), deposit insurance (5%), and storing amounts in accounts not exceeding the insured amount (5%). Some Russians rely on themselves in this matter — they keep accumulated cash at home (6%), monitor accounts (4%) and news (2%), withdraw funds (3%) and do not communicate with scammers (4%).

Fig. 2. How has your attitude towards banks changed over the past three years? (closed-ended question, one answer, % of all respondents)



SOCIAL ELEVATORS IN RUSSIA

November 13, 2023

Nowadays, the top 3 most “working” social elevators in the opinion of Russians are the following: sports (88%, + 5 percentage points compared to 2020), science and education (84%, +7 percentage points compared to 2020), military service (83%). Russians consider these elevators to be “working” for the last five years. Their acknowledgement, apparently, is determined not only by the cultural and historical characteristics of Russian society, but also by understandable, transparent mechanisms of “rise” and social mobility. This is either competition and objective achievements, as in sports, or length of training, recognized merit, as in science, or a clear hierarchy, as in the army.

There are elevators that work better or worse from year to year. For example, culture: in 2018 it was named among the effective elevators by 69% of respondents, and in the pandemic year of 2020

this share decreased (64%). Epidemiological restrictions on mass events have significantly hit show business. Today this area has been completely rehabilitated in the eyes of our fellow citizens (71%).

In 2020, Russians gave lower ratings to another social elevator — public organizations (2018 — 80%, 2020 — 73%, 2023 — 79%).

Some elevators begin to “go slower” over time, for example, the Russian Orthodox Church (61%, –6 percentage points compared to 2018). And others, on the contrary, are “accelerating”, primarily business (80%, +12 percentage points compared to 2018 and 2020). The increasing appreciation of business as a social elevator reflects the importance of entrepreneurship for Russian society. Today it is increasingly seen as an area of opportunity for achieving high social status.

Other social elevators gaining points include state and municipal administration (59%, +9 percentage points compared to 2020) and politics (54%, +7 percentage points compared to 2018 and 2020).

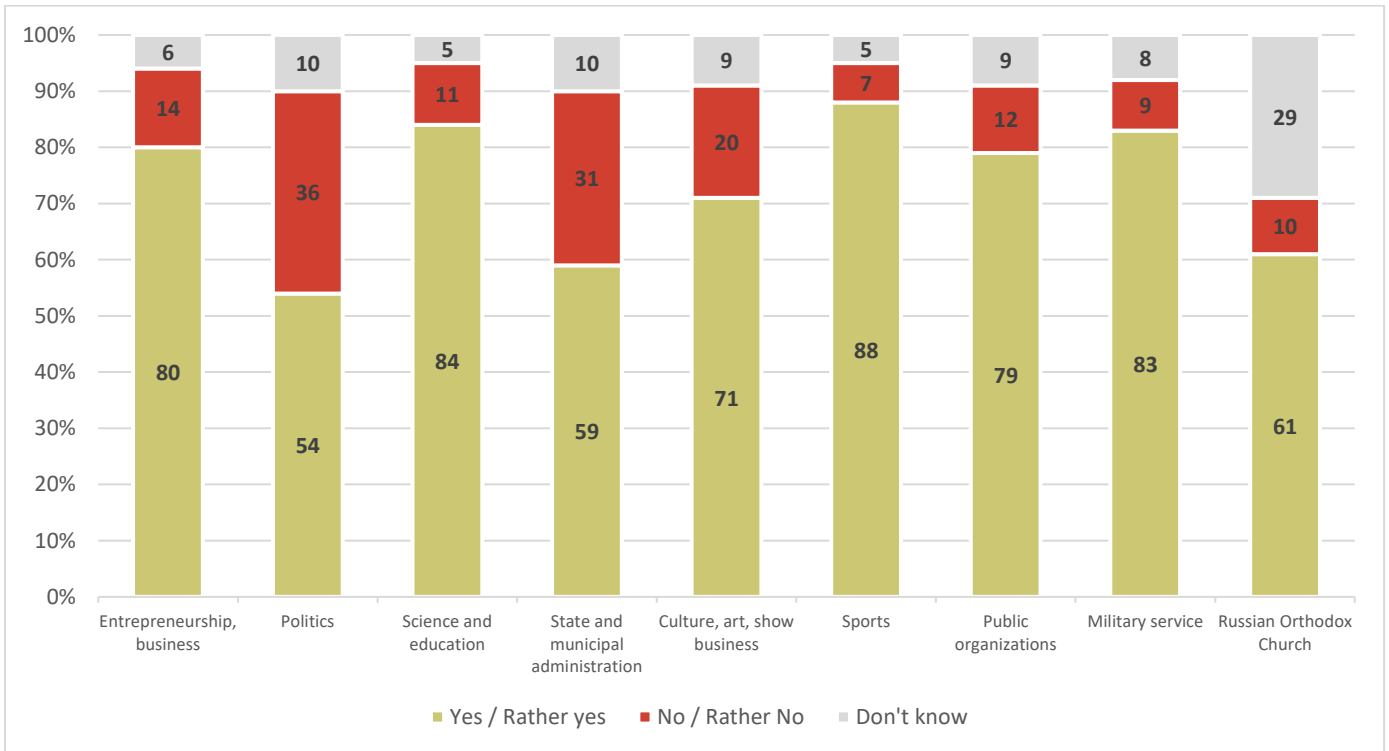
Representatives of younger age groups believe to a greater extent in the possibility of achieving a high social status through their efforts and talents with the help of social elevators. They most often noted all the listed elevators, especially business (91% in the group of aged 18-24 years old, 88% in the group of aged 25-34 years old versus 81% among all Russians) and show business (87% in the group of aged 18-24 years old, 80% in the group of aged 25-34 years old versus 71% among all Russians). This can be explained by the fact that today's young people are the Internet generation. For many modern businessmen, bloggers, and artists, the Internet has become a channel that has helped them promote themselves, their products, or services.

The higher the level of education, the more often citizens do not believe in the possibilities of social elevators. 41% of those with higher or incomplete higher education “do not believe” in politics (versus 20% among citizens with incomplete secondary education). The same applies to culture (22% versus 7%), church (11% versus 5%), state and municipal government (37% versus 13%), and public organizations (11% versus 6%).

Confidence in one's financial situation reinforces faith in the possibilities of social elevators. Russians with a good level of income are convinced that thanks to their talents they can succeed in business (89% versus 64% among citizens with poor financial standing), politics (69% versus 34%), science (90% versus 72%), state and municipal management (72% versus 42%), show business (80% versus 57%), etc.

Residents of Moscow and St. Petersburg are less inclined than other Russians to believe in the possibilities of social elevators in our country. For example, they are less likely to consider business (74% versus 81% among all Russians), politics (45% versus 53%), state and municipal administration (48% versus 59%), culture and show business (63% versus 71%), public organizations (69% versus 80%), and military service (69% versus 83%) to be a “working” elevator. Apparently, such differences are explained by the high competition that is observed in both capitals in all areas of life, including work, education, and career. High levels of competition can create barriers to social mobility and cause skepticism or mistrust of the social elevator system.

Fig. 3. In your opinion, in our country can a person, thanks only to his own abilities, succeed and achieve a high position in the following areas? (closed-ended question, one answer for each option, % of all respondents)



LIFESTYLE

ENERGY SAVING: MONITORING

NEW YEAR CELEBRATION: PRICE OF THE EVENT

ENERGY SAVING: MONITORING

November 17, 2023

According to a November VCIOM survey, six out of ten Russians save electricity (58%, in 2013 — 60%), and do this in a variety of ways. Conventionally, three following strategies for saving energy can be distinguished:

- optimization of electricity use (turning off lights where they are not needed, using motion sensors, turning on fewer lamps — 30%, +5 percentage points compared to 2013), including through a system of flexible tariffs (3%);

- use of energy-saving technologies (light bulbs — 18% (–10 percentage points compared to 2013), other appliances — 5%);

- rational use of electrical appliances (reasonable consumption (11%, +7 percentage points compared to 2013), turning off at night or when leaving home — 9% (+6 percentage points compared to 2013); savings on electric heating, turning off the TV, refusing to watch in the background, as well as refusing to use certain electrical appliances — 2% each). Over the past ten years, Russians have begun to use this strategy more often than others in saving energy.

Every third Russian admitted that (s)he does not take any measures to save electricity (35%, in 2013 — 36%). This behavior is more typical of men (39% versus 31% of women), young people under 35 years of age (18-24 years old — 55%, 25-34 years old — 49%), citizens with a good financial situation (44%), active Internet users (42%). On the contrary, electricity consumption monitoring is more prevalent among women (63% versus 54% of men), citizens over 45 years of age (45-59 years old — 64%, over 60 years old — 70%), with higher or incomplete higher education (64%), with poor financial situation (67%), as well as among active TV viewers (64%) and those who prefer both TV and the Internet to receive information (63%).

Most Russians who make efforts to save electricity note that this allows them to reduce the cost of paying for this utility service (65%). 22% do not feel any savings. Over ten years, the situation has changed little; in 2013, these shares reached 64% and 25%, respectively.

However, the motives for saving changed more significantly. Ten years ago, the financial motive was decisive (56%), while today it is mentioned by 37%, that is, one and a half times less often. At the same time, the share of those for whom saving electricity is a family habit has increased (37%, +6 percentage points compared to 2013), which may indicate the formation of traditions of energy saving. Also, the percentage of Russians monitoring their electricity consumption for the benefit of the planet has doubled (2013 — 9%, 2023 — 17%).

Russians give several justifications for refusing to save electricity. And the most popular of them is economic (no sense, the electricity is accessible, cheap — 29% of those who do not save; low level of

consumption — 12%; enough money to pay — 11%). The second justification is the established level of required electricity consumption (10%) and the habit of reasonable consumption, which makes saving unnecessary (8%). Another aspect is the lack of interest in the topic; today 4% in this group say that they have not thought about why they do not save electricity.

NEW YEAR CELEBRATION: PRICE OF THE EVENT

December 8, 2023

The average planned expenses of Russians for three holiday items (New Year's menu (food), presents, and leisure) have increased over the past year by 16,399 rubles.

Presents to family and friends will have the greatest impact on the family budget: Russians plan to please their family by purchasing an average of 21,846 rubles (+6,662 rubles compared to 2022). New Year's leisure activities — visiting cultural and entertainment events, tourist trips, etc. — will cost an average of 20,467 rubles (+6,090 rubles compared to 2022). However, for now it remains the most unplanned expenses: only every second person was able to name a specific amount during the December survey (47% versus 71—73% for other categories of spending), another 30% answered that they do not plan to spend money on entertainment, and 23% found it difficult to answer.

For the second year in a row, the New Year's menu remains a relatively less expensive item of expenditure — 11,754 rubles (+3,648 rubles compared to 2022). Previously (in 2005—2021), Russians planned to spend approximately the same amount for the festive dinner, entertainment, and presents, whereas today emotions and pleasant memories are a priority.

In total, the average planned costs for celebrating the New Year reached a historical maximum and amounted to 54,067 rubles.

Spending on New Year's celebrations falls more on men's shoulders — 71,434 rubles (versus 40,243 rubles among women). On average, men are willing to spend more than 30 thousand rubles (30,368 rubles) on New Year's presents, that is, twice as much as women (15,516 rubles).

The most spending group was young people aged 18-24 (72,648 rubles), the most thrifty were representatives of the older generation aged 60 years old and older (30,451 rubles). At the same time, every second person in the oldest age cohort does not intend to spend money on New Year's entertainment (49%), and those who did plan such expenses (28% among 60+ years old) are ready to spend approximately 10 thousand rubles (9,917 rubles). Russian parents (aged 35-44 years old) will not be able to save on entertainment; their leisure expenses will average 25,424 rubles (versus 20,467 rubles for the sample as a whole).

Russians who assess their financial situation as good or very good expect to spend an average of 73,803 rubles, 42% of this amount will be spent on presents for family and friends (31,280 rubles).

Fig. 1. Approximately how much money do you plan to spend during the New Year celebrations on...? (open-ended question, one answer, average amount of expenses in rubles according to the answers of those who plan corresponding expenses)

