



Yakov and Partners × Romir

The new Russian society: cities and child birth rates

June 2024

Consumer pulse survey profile



Yakov and Partners × Romir

In May **2024**, Yakov and Partners consultancy and Romir Research Holding conducted an extensive opinion poll based on Romir's proprietary Longitudinal System¹ to **investigate Russian consumer sentiments and changing habits in the context of the past turbulent 2023**

Based on the poll, we made an in-depth analysis **by generation, income, and geostrata**

~2 700

respondents across Russia with widely different sociodemographics:

- Region
- Age (and generation)
- Level of income
- Gender
- Education
- Type of employment
- Marital status
- Family members

9

sections with questions structured by **key consumer "lenses"**:

- Well-being drivers
- Employment
- Family
- Small towns
- Loans and savings
- Changes in prices and spending
- Brand substitution
- Favorite brand
- Artificial intelligence

1. A social research tool based on continuous collection of behavioral data from a representative population sample which allows to build a model of society in its dynamic development taking into account all the relevant criteria and segmentation by socio-demographic characteristics, lifestyle, values, and other criteria

Section 3.

Family

01

16% of the respondents are considering having a child, with 7% planning to do so within a year

Respondents with no children (18%) and an only child (17%) seem to be the most inclined to have a baby. The share of those willing to have a child declines to 11% among the respondents with two children, yet rises again among those who have three or more (14%)

Generation Y members (20 to 37 y.o.) seem to be the most inclined to have a baby (27%), while generation X (38 to 58 y.o.) are the least willing to do so (8%)

The desire to have children grows along with income, with the biggest increase (from 16% to 23%) observed among people with a monthly income exceeding RUB 80,000+ per person

Residents of smaller towns with a population below 100,000 seem to be the most inclined to have children (22%)

Residents of the Far Eastern Federal District seem to be the most inclined to have children (24%), while those in the Siberian FD are the least so (13%)

02

Financial resources are the main factor guiding the decision on having children among all the respondents regardless of their age, income, or place of residence

The most important factors behind such a decision are finance (47%), affordable and high-quality healthcare (22%), and desire to have children (22%). Government support for families came in only fifth on the list (15%)

Factors guiding the decision regarding having children are practically the same among women and men

18 and 19-year-olds mentioned the quality of education (25%) and a possibility to combine a career and family life (25%) among the top 3 factors

Residents in million-plus cities (excluding Moscow and St. Petersburg) ranked child safety as the second most important factor (23%)

Residents in the least child-focused federal districts attach importance to their partner's willingness to have children (14%), government's support (13%), and child safety (16%)

03

The most efficient measures that could encourage the respondents to have children are better maternity leave policies, better healthcare, and larger maternity capital; campaigns promoting large families bring up the rear

Women named improved maternity leave policies (52%) and better healthcare (49%) as the main measures that could motivate them to have a baby, while men emphasized the importance of accessible kindergartens and larger maternity capital (31% each). Campaigns promoting large families seem to be the least efficient measure (18%)

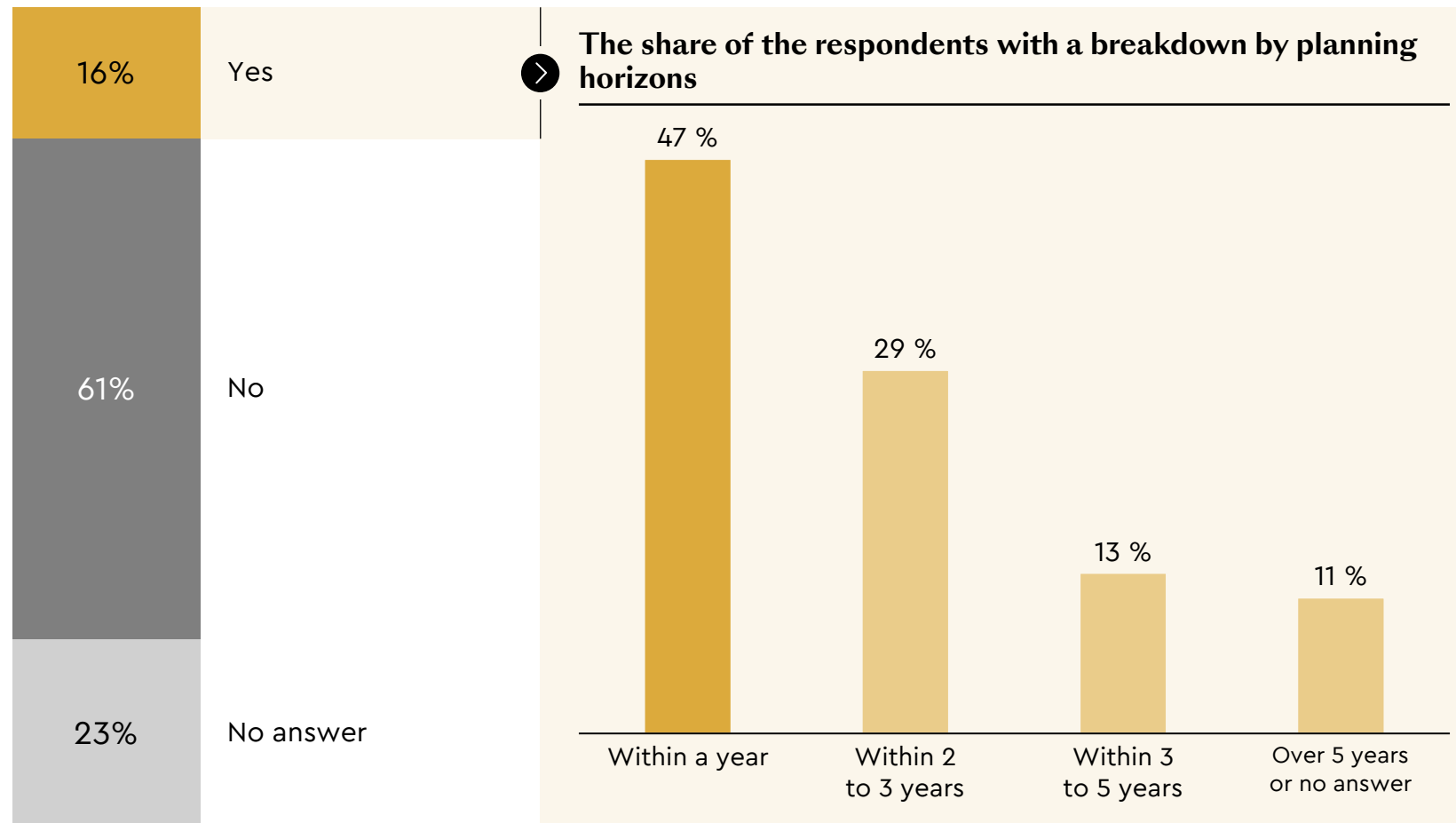
Maternity leave policies, quality healthcare and maternity capital are important for respondents across all age groups. Respondents aged between 20 and 37 also mentioned accessible childcare facilities and hobby clubs among the top 3 factors (24%), while 18 to 19-year-olds emphasized the importance of better family mortgage policies (35%)

High-income respondents attribute importance to accessibility of childcare facilities and hobby clubs (36%); affordable recreation for children rounds out the top 3 factors (31%)

Respondents in the least child-focused federal districts value accessibility of childcare facilities and hobby clubs (32%) and better family mortgage policies (23%)

16% of the respondents contemplate having a child, with 7% planning to do so within one year

"Are you planning to have a baby in the foreseeable future?" %



Almost half of the respondents who contemplate having a baby plan to do so within one year

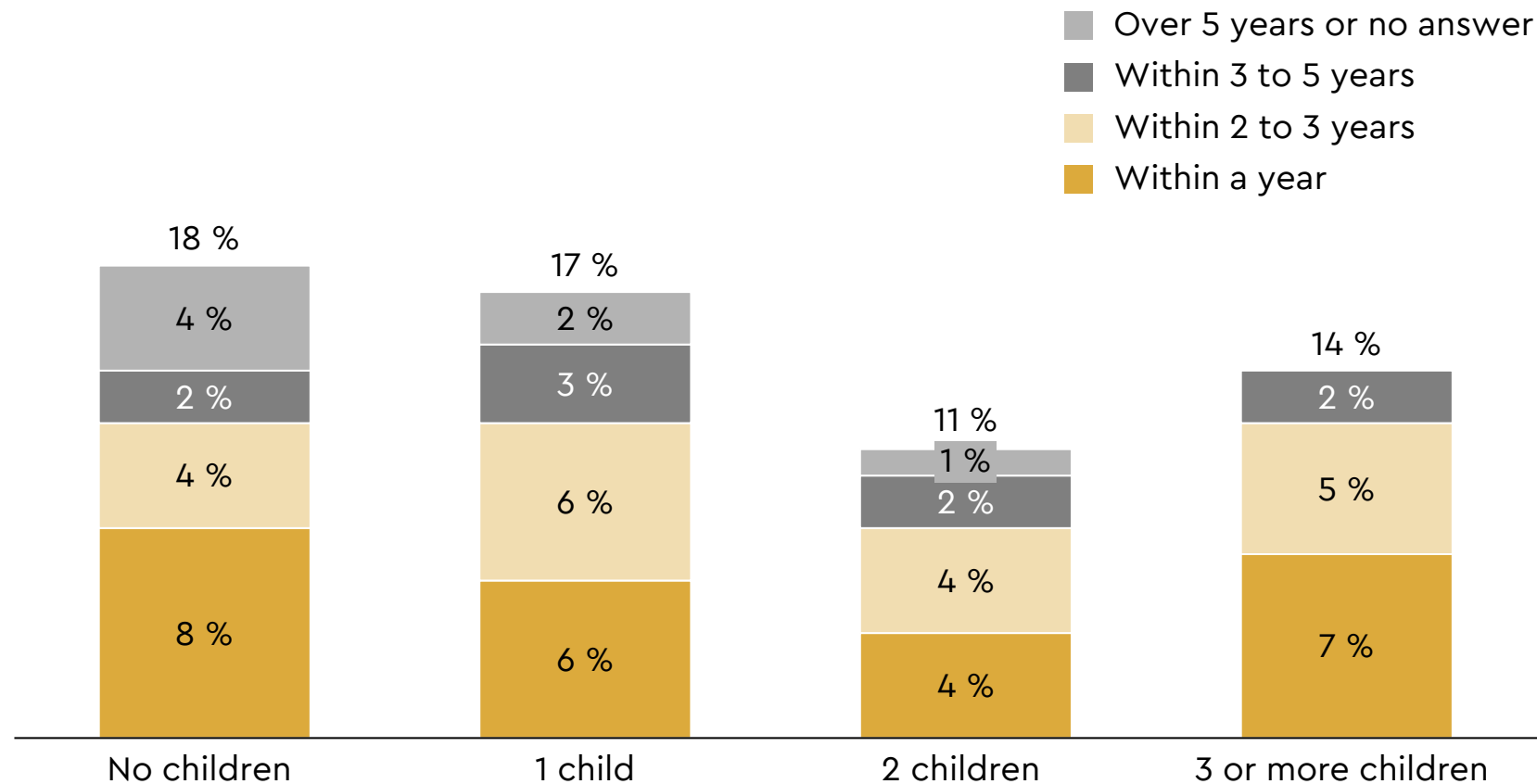
Question: "Are you planning to have a baby in the foreseeable future?"

Question: "When are you planning to have a baby?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Childless respondents are the most inclined to have a baby (18%), followed by respondents with 1 child (17%)

The share of the respondents planning to have a baby with a breakdown by the number of children they already have, %



The share of those willing to have a baby drops to **11%** among the respondents with 2 children, yet increases again among those who have 3 or more children (**14%**)

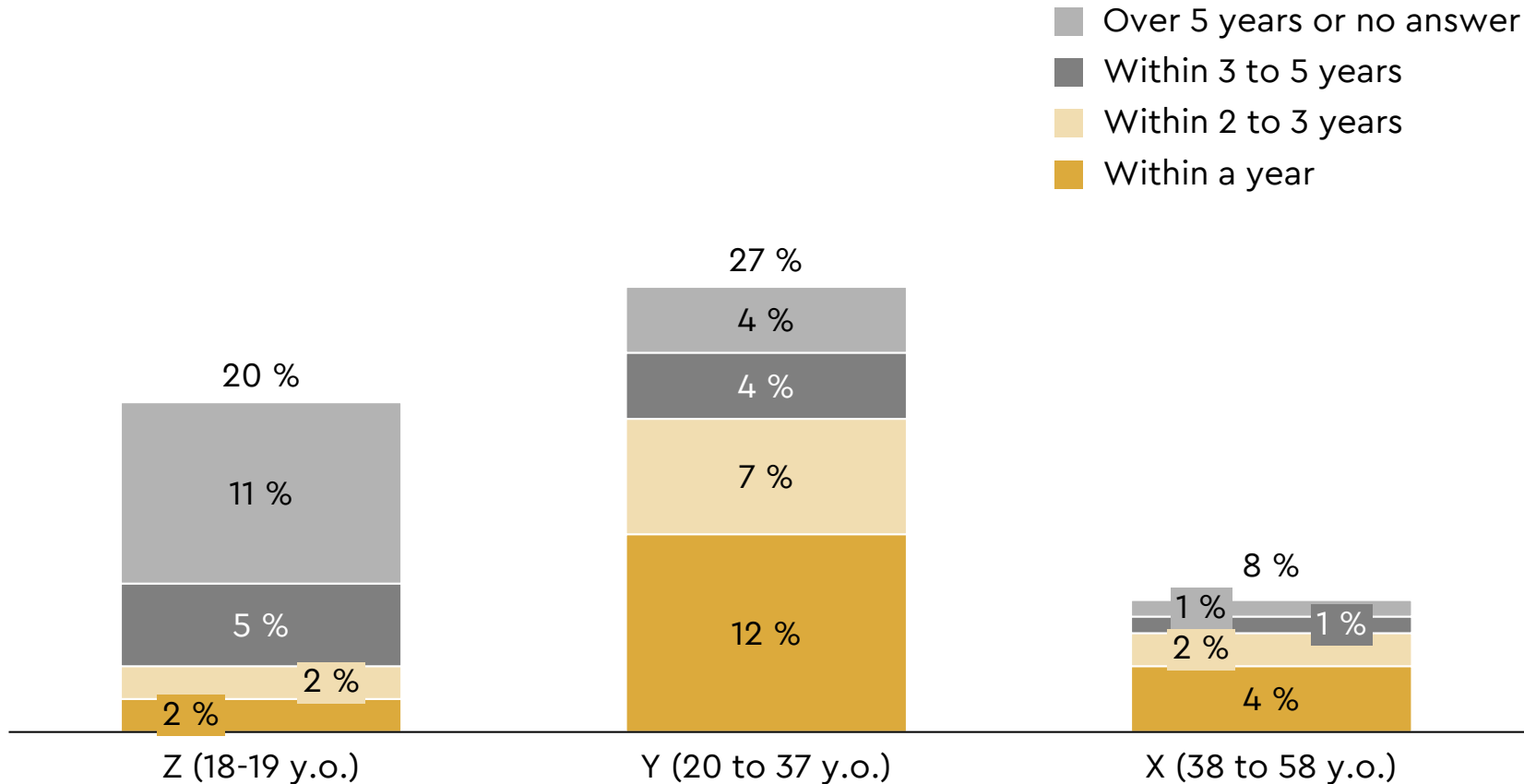
The majority of the respondents contemplating having a baby are planning to do so within one year regardless of the number of children they already have

Question: "Are you planning to have a baby in the foreseeable future?"
Question: "When are you planning to have a baby?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Respondents aged between 20 and 37 seem to be the most inclined to have a baby, while 38- to 58-year-olds are the least inclined to do so

The share of the respondents planning to have a baby by generation¹, %



19% of generation Y members are planning to have a baby in the next 3 years

18 to 19-year-olds tend to put off plans to have children until later in the future

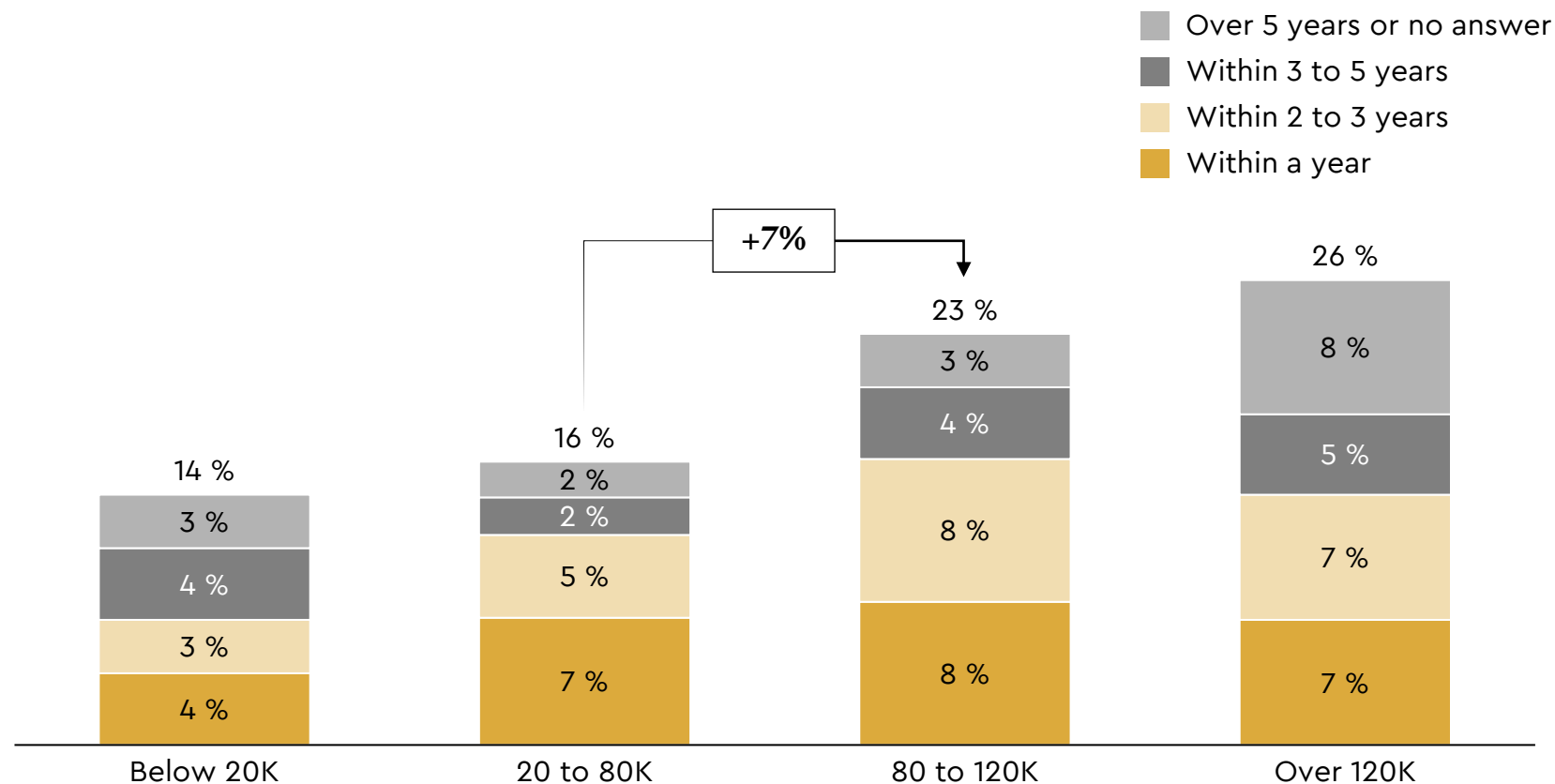
1. Generation Z (Zoomers) – 0–19 y.o. (18–19 y.o. in the poll); Y – 20–37 y.o.; X – 38–58 y.o.; senior generation – 59–78 y.o. up to 64 y.o. in the poll)

Question: «Are you planning to have a baby in the foreseeable future?»

Question: "When are you planning to have a baby?"

The desire to have children grows along with income, with the biggest increase observed among people with a monthly income of RUB 80,000+ per person

The share of the respondents planning to have a baby by monthly income per family member, %



The most significant increase in the desire to have children – **from 16% to 23%** – is observed along with transition from monthly incomes of 20-80K rubles (**85%** of Russian citizens¹ as of 2023) to 80–120K rubles

26% of the better-off respondents enjoying an income of over RUB 120K feel inclined to have a baby

Respondents with a monthly income of 20K to 80K rubles feel the most inclined to have a baby as soon as within a year (**49%**); other income groups are considering more distant time intervals

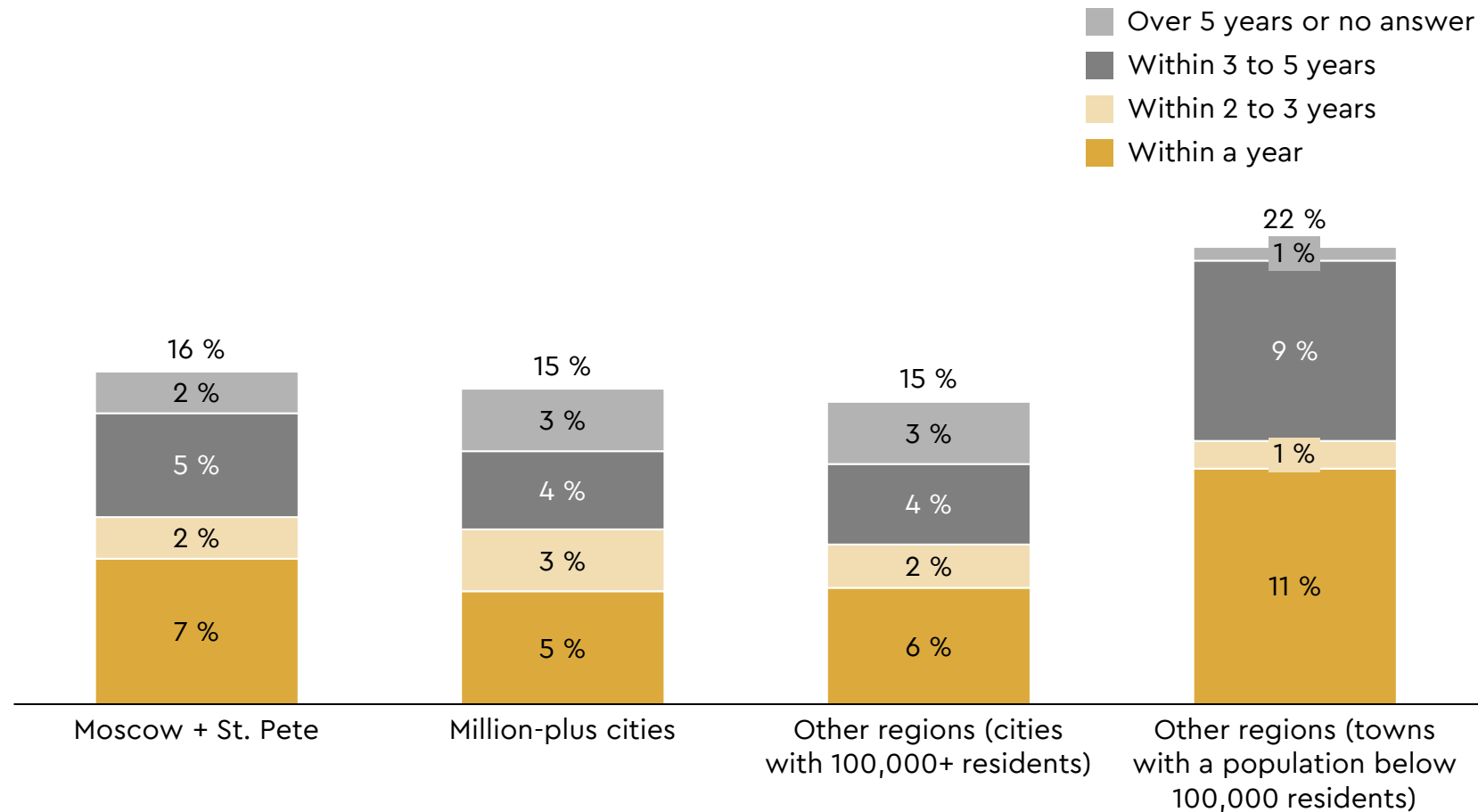
1. Per capita income in 2023 (Rosstat data)

Question: "Are you planning to have a baby in the foreseeable future?"

Question: "When are you planning to have a baby?"

Residents of smaller towns with a population below 100,000 seem to be the most inclined to have children

The share of the respondents planning to have a baby by region, %



More than half (**52%**) of residents of smaller towns with a population below 100,000 people are planning to have a baby within a year

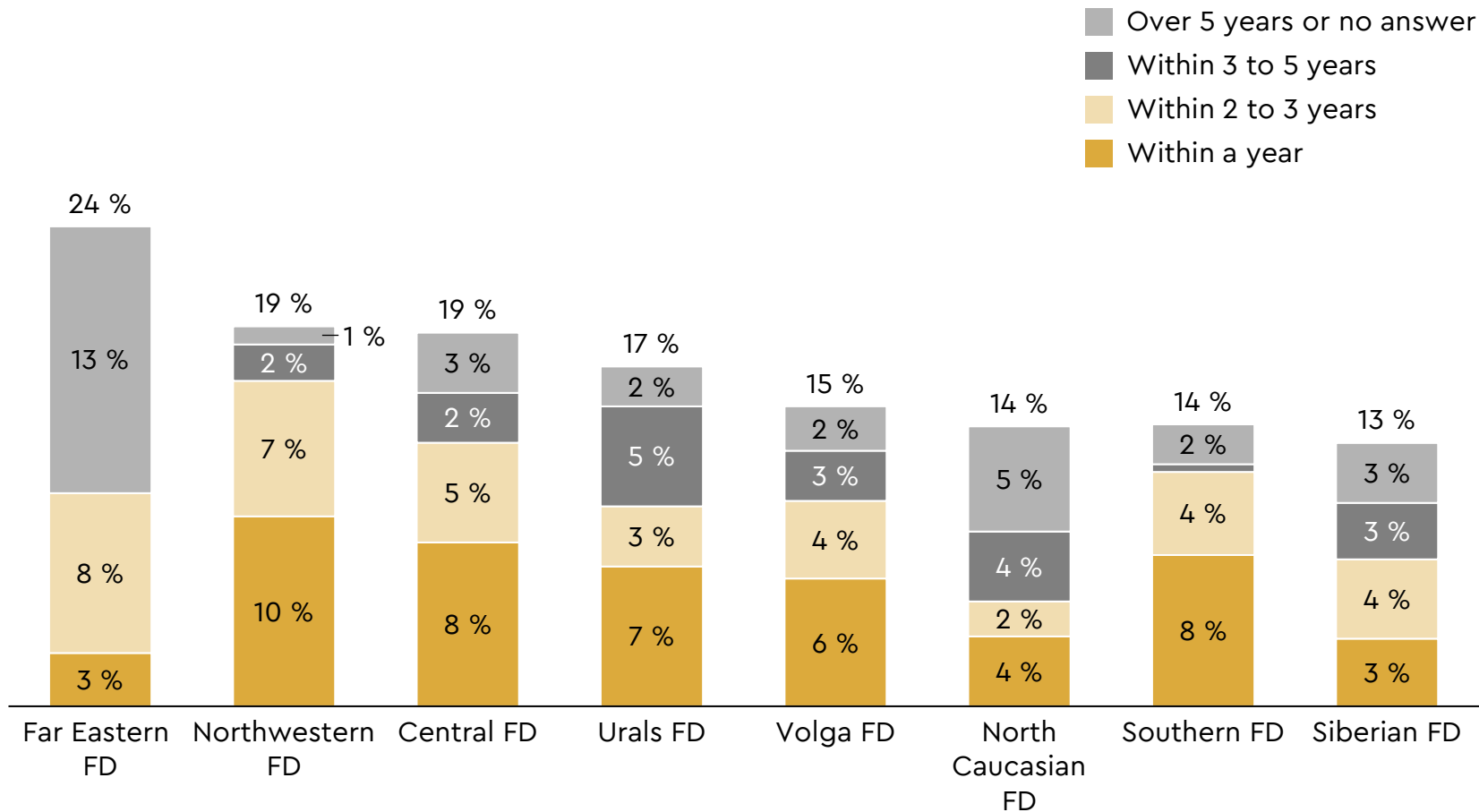
The share of those willing to have a baby in larger cities is approximately the same, with little or no difference between Moscow, St. Petersburg, other million-plus cities, and medium-size cities

Question: "Are you planning to have a baby in the foreseeable future?"
Question: "When are you planning to have a baby?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Residents of the Far Eastern Federal District seem to be the most inclined to have children, while those in the Siberian FD are the least so

The share of the respondents planning to have a baby by federal district, %



Respondents in the Far East are the most inclined to have children, but considering a more distant perspective, with only 3% of the respondents planning to have a baby within the next 12 months

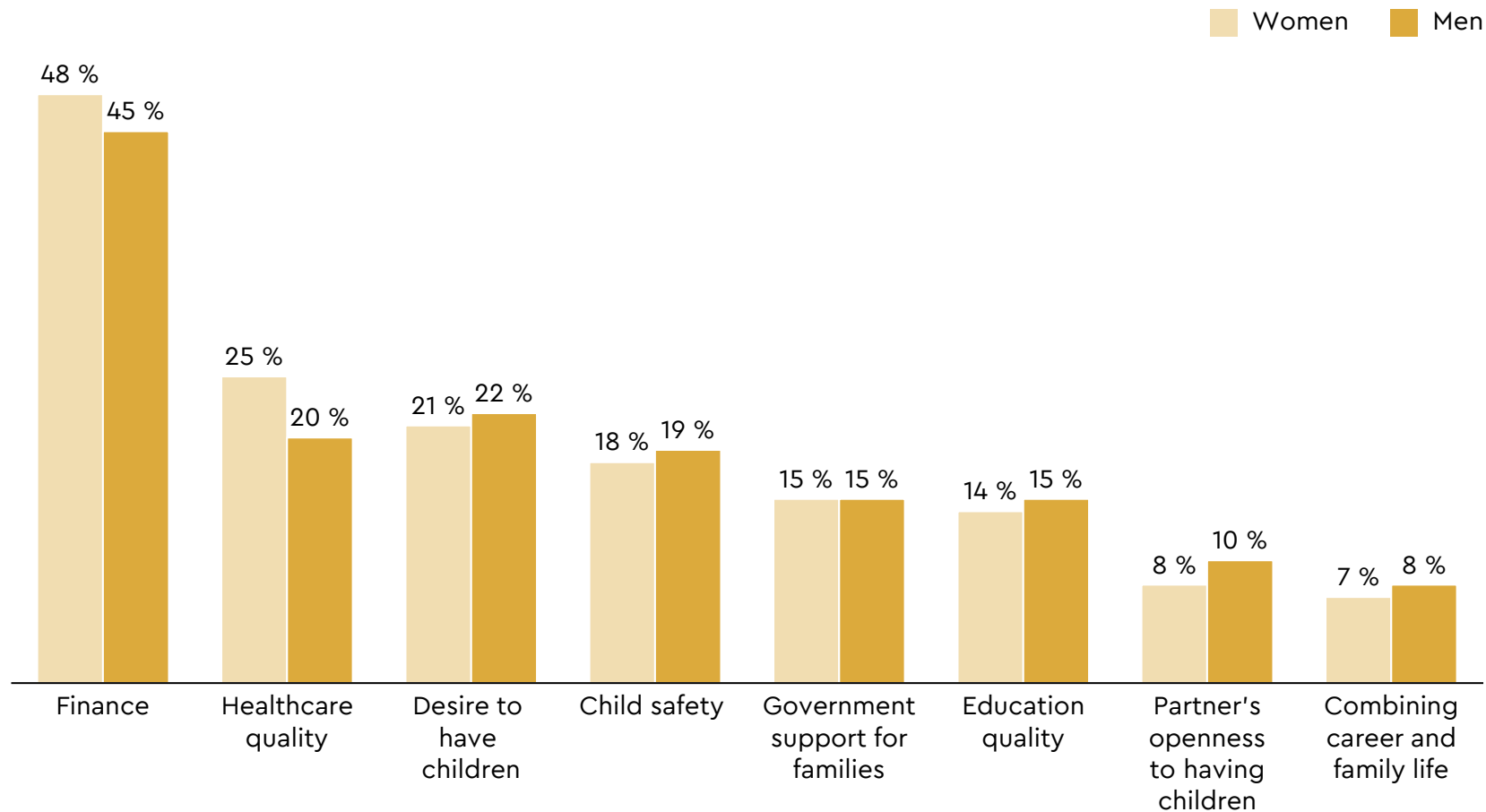
Residents of the Northwestern, Central, and Urals districts are considering having a baby within a year or two, which could probably be explained by stronger job security and prospects

Question: "Are you planning to have a baby in the foreseeable future?"
Question: "When are you planning to have a baby?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Financial security is the key factor guiding the decision to have a baby for all respondents

Top factors guiding the decision to have a baby, %



Question: "Which factors play a decisive role in your decision to have children?"
Multiple choice with a maximum of 3 options

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Top 3 factors influencing the decision to have a baby include finance (**47%**), accessible and high-quality healthcare (**22%**), and a wish to have children (**22%**)


Government support for families did not make it to the top factors guiding decision-making in this area (**15%**)


Combining career and family life is the least important factor as it was selected by only **8%** of the respondents

Men and women mostly mentioned the same factors influencing the decision to have a baby

18 to 19-year-olds put a lot of store by the quality of education and combining career and family life

Factors influencing the decision to have children, the share of the respondents by generation, %



Factors (sorted by the nation-wide average) 	Generations ¹		
	Z (18-19 y.o.)	Y (20 to 37 y.o.)	X (38 to 58 y.o.)
Financial capabilities to provide for the child's needs	75%	59%	43%
Affordable and high-quality healthcare	38%	28%	21%
Desire to have children	24%	24%	22%
Child safety	19%	24%	17%
Government support for families, including allowances, benefits, etc.	19%	20%	13%
Education quality and resources for child development	25%	19%	13%
Partner's openness to having children	6%	11%	10%
Combining career and family life	25%	11%	6%

75% of Zoomers pointed out financial resources as the key factor guiding their decision on having children. This indicator drops to **59%** among those aged between 20 and 37, and to **43%** among those aged between 38 and 58. However, financial capabilities remain the most important consideration for respondents of all ages

Members of generation Z also emphasized the importance of high-quality healthcare and education and possibility of combining career and family life (**25% each**)

1. Generation Z (Zoomers) – 0–19 y.o. (18–19 y.o. in the poll); Y – 20–37 y.o.; X – 38–58 y.o.; senior generation – 59–78 y.o. up to 64 y.o. in the poll)

Question: "Which factors play a decisive role in your decision to have children?"

Multiple choice with a maximum of 3 options

Residents of million-plus cities (except Moscow and St. Petersburg) named child safety among the top factors

Factors influencing the decision to have children, the share of the respondents by geostrata, %

Factors (sorted by the nation-wide average)	Geostrata ¹			
	Top 3 factors		Other regions	
	Moscow + St. Pete	Million-plus cities	(cities with 100,000+ residents)	(towns with a population below 100,000 residents)
Financial capabilities to provide for the child's needs	44%	48%	47%	43%
Affordable and high-quality healthcare	23%	21%	23%	22%
Desire to have children	20%	21%	22%	21%
Child safety	19%	23%	18%	14%
Government support for families, including allowances, benefits, etc.	17%	15%	16%	14%
Education quality and resources for child development	14%	15%	15%	13%
Partner's openness to having children	10%	10%	10%	9%
Combining career and family life	7%	8%	7%	7%

Question: "Which factors play a decisive role in your decision to have children?"
Multiple choice with a maximum of 3 options

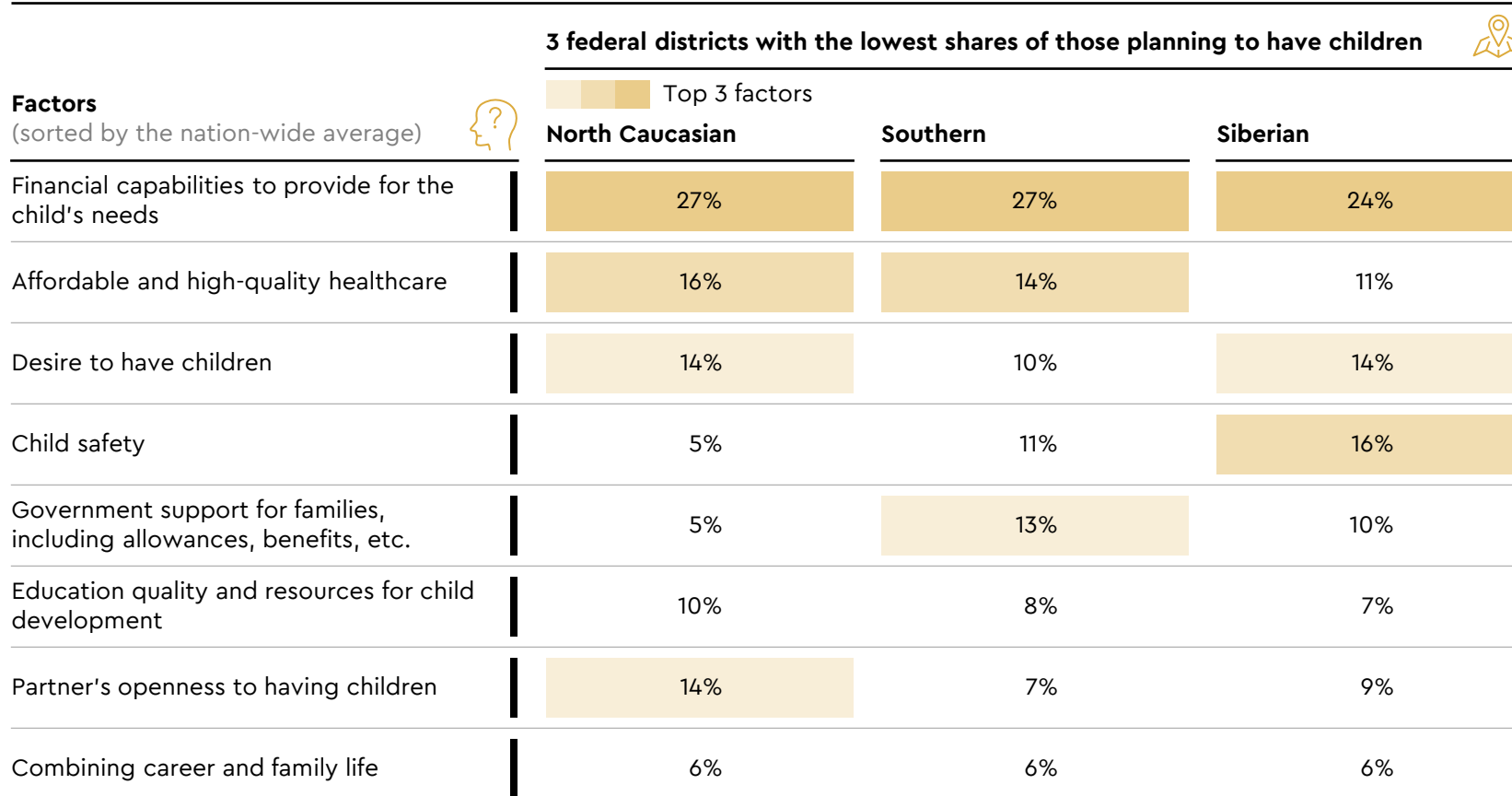
Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

For residents of million-plus cities (except Moscow and St. Petersburg) child safety comes in as the second most important consideration (**23%**)

Government support didn't make it to the top 3 factors in any region; interestingly, residents of smaller towns mentioned it even less often than those in large cities

In the least child-oriented regions, respondents prioritize their partner's willingness to have children, government support, and child safety

Factors influencing the decision to have children, the share of the respondents by federal district, %



In those regions where respondents are the least inclined to have children, even financial capabilities scored 24% to 27% of the responses, which is twice as low as the national average

Respondents in the Southern FD included government support for families into the top 3 factors influencing their decision to have children **(13%)**

In the Siberian FD, child safety came in second on the list of important factors **(16%)**

Respondents in the North Caucasian FD attach a lot of importance to their partner's willingness to have children **(14%)**

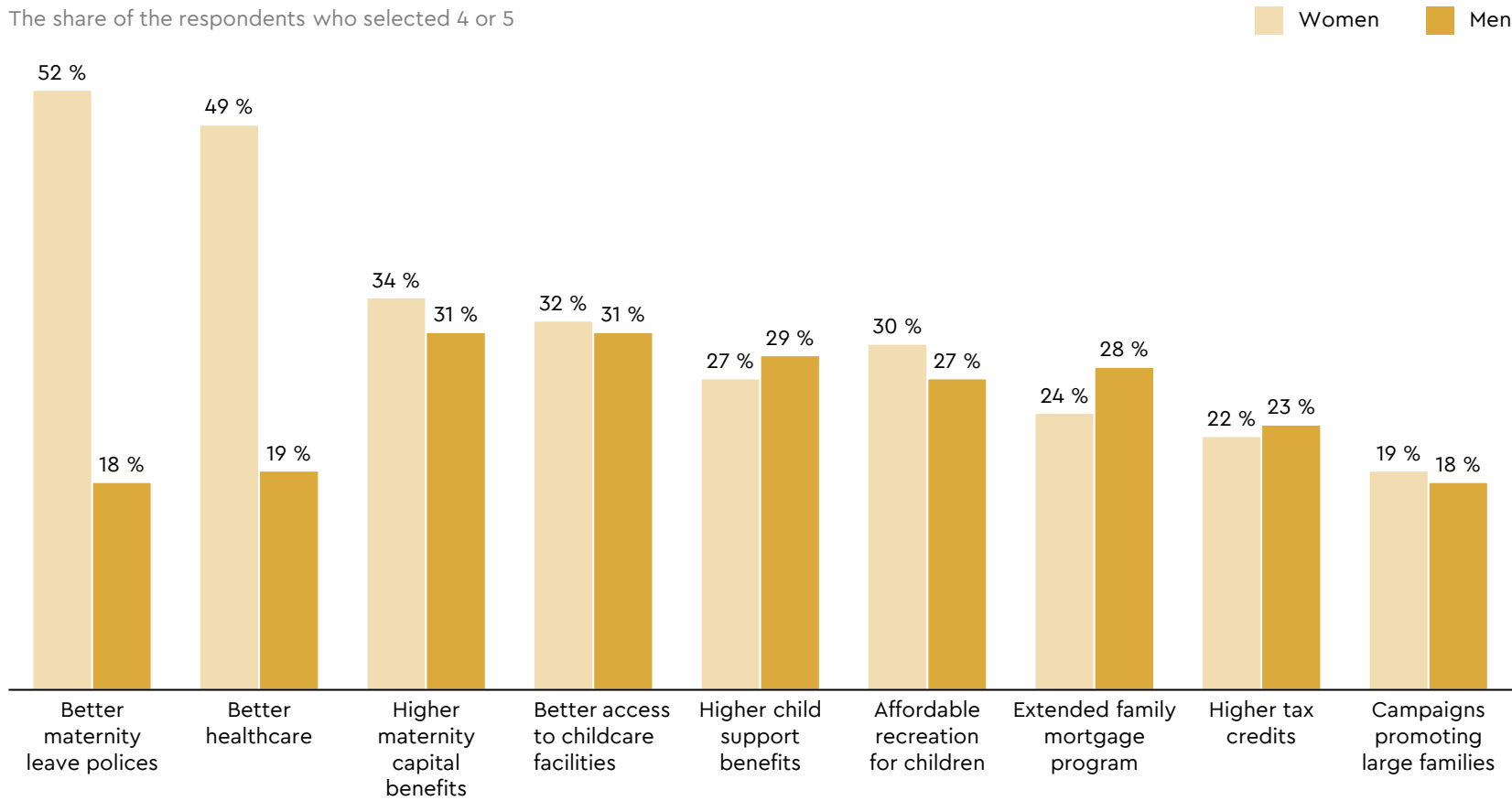
Question: "Which factors play a decisive role in your decision to have children?"
Multiple choice with a maximum of 3 options

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Top measures that could encourage people to have children are better healthcare and maternity leave benefits, as well as larger maternity capital

"To what extent could the existing and proposed state support measures motivate you to have a baby?"

The share of the respondents who selected 4 or 5



While women named improved maternity leave policies (**52%**) and better healthcare (**49%**) as the main measures that could motivate them to have a baby, men emphasized the importance of accessible childcare facilities (both infant schools and kindergartens) and larger maternity capital (**31% each**)

Campaigns promoting large families bring up the rear (**18%**)

Question: "To what extent could the existing and proposed state support measures motivate you to have a baby (on a scale of 1 to 5, where 1 stands for "It has no bearing on my decision" and 5 stands for "I feel ready to have a baby thanks to this measure")?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Maternity leave policies, healthcare, and maternity capital are important for all age groups

"To what extent could the existing and proposed state support measures motivate you to have a baby?"

The share of the respondents who selected 4 or 5

Factors (sorted by the nation-wide average)	Generations ¹		
	Z (18-19 y.o.)	Y (20 to 37 y.o.)	X (38 to 58 y.o.)
Better maternity leave polices	37%	25%	41%
Better healthcare	38%	24%	41%
Higher maternity capital benefits	35%	23%	41%
Better access to childcare facilities and hobby clubs	35%	24%	39%
Higher child support benefits	30%	20%	36%
Affordable recreation for children	30%	21%	35%
Extended family mortgage program	35%	17%	33%
Higher tax credits	23%	16%	30%
Campaigns promoting large families	22%	13%	22%

1. Generation Z (Zoomers) – 0–19 y.o. (18–19 y.o. in the poll); Y – 20–37 y.o.; X – 38–58 y.o.; senior generation – 59–78 y.o. up to 64 y.o. in the poll)

Question: "To what extent could the existing and proposed state support measures motivate you to have a baby

(on a scale of 1 to 5, where 1 stands for "It has no bearing on my decision" and 5 stands for "I feel ready to have a baby thanks to this measure")?

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Better maternity leave polices, better healthcare, and higher maternity capital are the top 3 most important factors for respondents across all age groups

The respondents aged 20 to 37 also included more accessible childcare and hobby clubs into the list of top factors

18 to 19-year-olds emphasized the importance of better family mortgage policies: this measure could encourage as many as **35%** of the respondents to start a family

Better-off respondents are more concerned about availability of childcare facilities and hobby clubs, as well as affordability of recreation for children

"To what extent could the existing and proposed state support measures motivate you to have a baby?"

The share of the respondents who selected 4 or 5

Factors (sorted by the nation-wide average)	Income level ¹		
	Low	Medium	High
Better maternity leave policies	26%	30%	34%
Better healthcare	23%	29%	34%
Higher maternity capital benefits	25%	28%	31%
Better access to childcare facilities and hobby clubs	22%	27%	36%
Higher child support benefits	22%	24%	30%
Affordable recreation for children	20%	25%	31%
Extended family mortgage program	17%	22%	27%
Higher tax credits	16%	20%	26%
Campaigns promoting large families	11%	15%	22%

1. Low income – RUB 20,000 or less per family member; medium income – RUB 20,001–80,000; high income – RUB 80,001 or higher

Question: "To what extent could the existing and proposed state support measures motivate you to have a baby (on a scale of 1 to 5, where 1 stands for "It has no bearing on my decision" and 5 stands for "I feel ready to have a baby thanks to this measure")?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024


High-income respondents attribute the most importance to accessible childcare facilities and hobby clubs **(36%)**

Affordable recreation for children also made it to the top 3 most important factors for high-income individuals **(31%)**

Respondents in the least child-oriented regions value accessible family mortgage and childcare facilities

"To what extent could the existing and proposed state support measures motivate you to have a baby?"

The share of the respondents who selected 4 or 5

Factors (sorted by the nation-wide average)	3 federal districts with the lowest shares of those planning to have children 		
	North Caucasian	Southern	Siberian
Better maternity leave polices	33%	32%	22%
Better healthcare	31%	33%	22%
Higher maternity capital benefits	27%	31%	24%
Better access to childcare facilities and hobby clubs	29%	32%	23%
Higher child support benefits	25%	30%	16%
Affordable recreation for children	22%	28%	18%
Extended family mortgage program	20%	24%	23%
Higher tax credits	18%	22%	14%
Campaigns promoting large families	14%	17%	11%

Respondents in the Southern (**32%**), North Caucasian (**29%**), and Siberian (**23%**) Federal Districts attribute a lot of importance to accessible childcare facilities and hobby clubs

Respondents in the Siberian FD also emphasized the importance of better family mortgage policies: this measure could encourage as many as **23%** of the respondents to have children

Question: "To what extent could the existing and proposed state support measures motivate you to have a baby (on a scale of 1 to 5, where 1 stands for "It has no bearing on my decision" and 5 stands for "I feel ready to have a baby thanks to this measure")?"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024



Section 4. Small towns

01

Respondents could be enticed to relocate to a small town (up to 100,000 residents) in search of a comfortable urban environment, high salaries, and quality housing

Top 3 factors guiding the decision to relocate are comfortable urban environment (**42%**), high salaries (**41%**), and good quality housing (**40%**)

Up to 48% of the youngest¹ respondents would be willing to live in a small town, yet name all the factors on the list (from comfortable urban environment to proximity to cultural facilities) as important

Senior generation seems to be the least mobile, yet would consider moving to a small town if it offers a comfortable living environment (32% of the respondents) and good quality housing (30%)

High-income respondents² would consider relocation in order to live in an own house (**38%**)

37% of Moscow and St. Petersburg residents would also consider this move in order to live in an own house

1. Generation Z (Zoomers) – 0–19 y.o. (18–19 y.o. in the poll); Y – 20–37 y.o.; X – 38–58 y.o.; senior generation – 59–78 y.o. up to 64 y.o. in the poll)

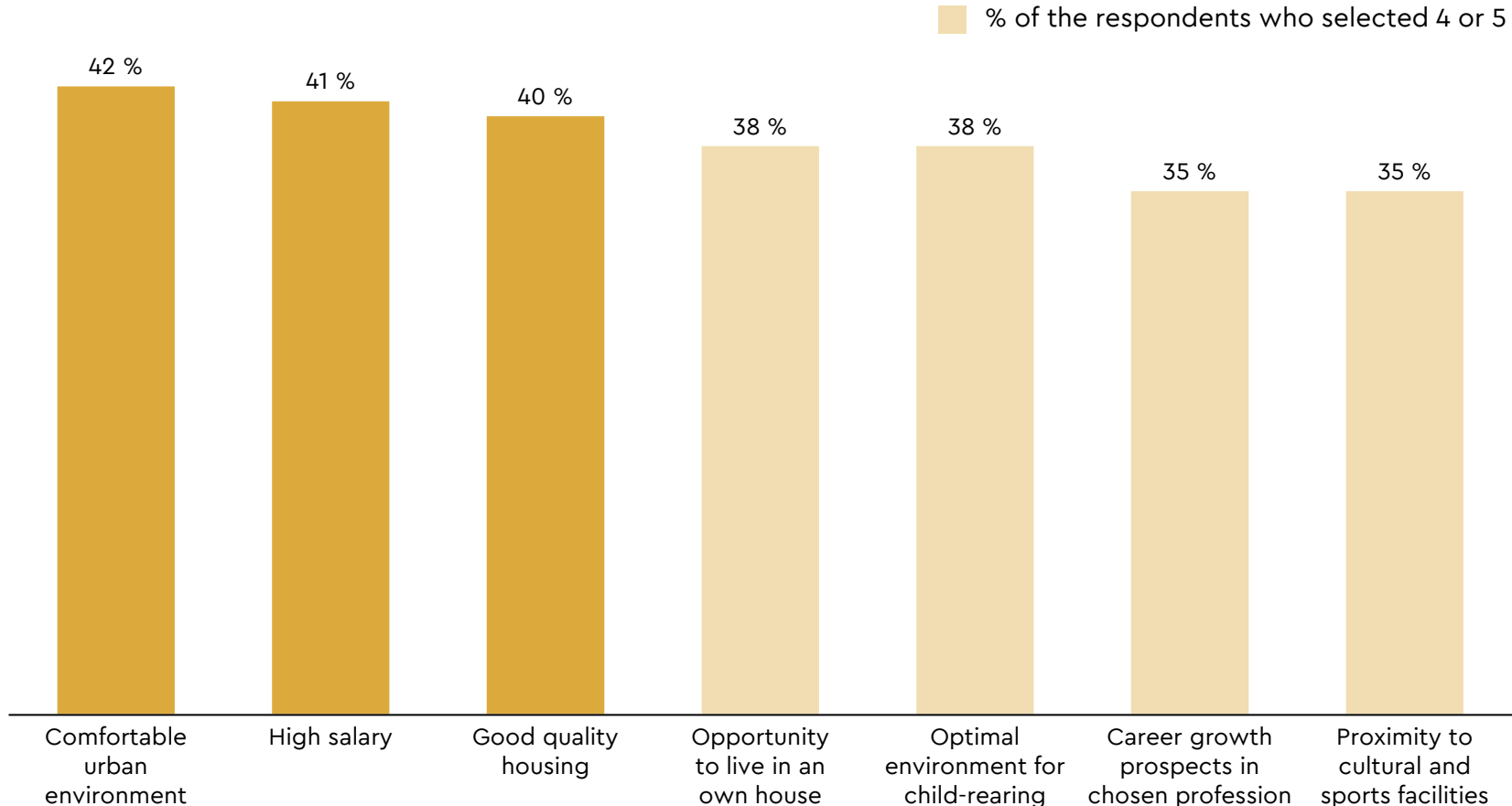
2. Low income – RUB 20,000 or less per family member; medium income – RUB 20,001–80,000; high income – RUB 80,001 or higher

Question: "Please rate the factors that could motivate you to relocate to a small town in Russia (up to 100,000 residents)

on a scale of 1 to 5, where 1 stands for "It could have no bearing on my decision" and 5 stands for "I would be ready to relocate to a small town"

Comfortable urban environment, high salaries, and good quality housing could encourage citizens to relocate to smaller towns

"Please rate the factors that could motivate you to relocate to a small town¹ in Russia"



Comfortable urban environment, high salaries, and good quality housing could entice up to 42% of the respondents to relocate to a small town

1. A small town is defined as having a population of up to 100,000 residents

Question: "Please rate the factors that could motivate you to relocate to a small town in Russia (up to 100,000 residents) on a scale of 1 to 5, where 1 stands for "It could have no bearing on my decision" and 5 stands for "I would be ready to relocate to a small town")"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Almost 50% of the younger respondents are ready to move to a small town

"Please rate the factors that could motivate you to relocate to a small town¹ in Russia"

The share of the respondents who selected 4 or 5

Factors (sorted by the nation-wide average)	Generation ²			
	Z	Y	X	Senior generation
Comfortable urban environment	48%	43%	43%	32%
High salary	48%	43%	43%	23%
Good quality housing	48%	41%	42%	30%
Opportunity to live in an own house	44%	39%	39%	26%
Optimal environment for child-rearing	43%	39%	40%	21%
Career growth prospects in chosen profession	48%	38%	36%	16%
Proximity to cultural and sports facilities	41%	36%	37%	19%



Up to **48%** of the respondents aged 18-19 would consider living in a small town if it could provide a comfortable environment, opportunities to earn a high income, good quality housing, and career prospects (**48%** of those surveyed), as well as proximity to cultural and sports facilities (**41%**). This could be attributed to the fact that members of the younger generation haven't quite made up their minds regarding what really matters for them

Senior generation is reluctant to relocate, yet would be ready to consider a small town providing it offers a comfortable living environment (**32%** of the respondents) and quality housing (**30%**)

1. A small town is defined as having a population of up to 100,000 residents

2. Generation Z (Zoomers) – 0–19 y.o. (18–19 y.o. in the poll); Y – 20–37 y.o.; X – 38–58 y.o.; senior generation – 59–78 y.o. up to 64 y.o. in the poll)

Question: "Please rate the factors that could motivate you to relocate to a small town in Russia (up to 100,000 residents)

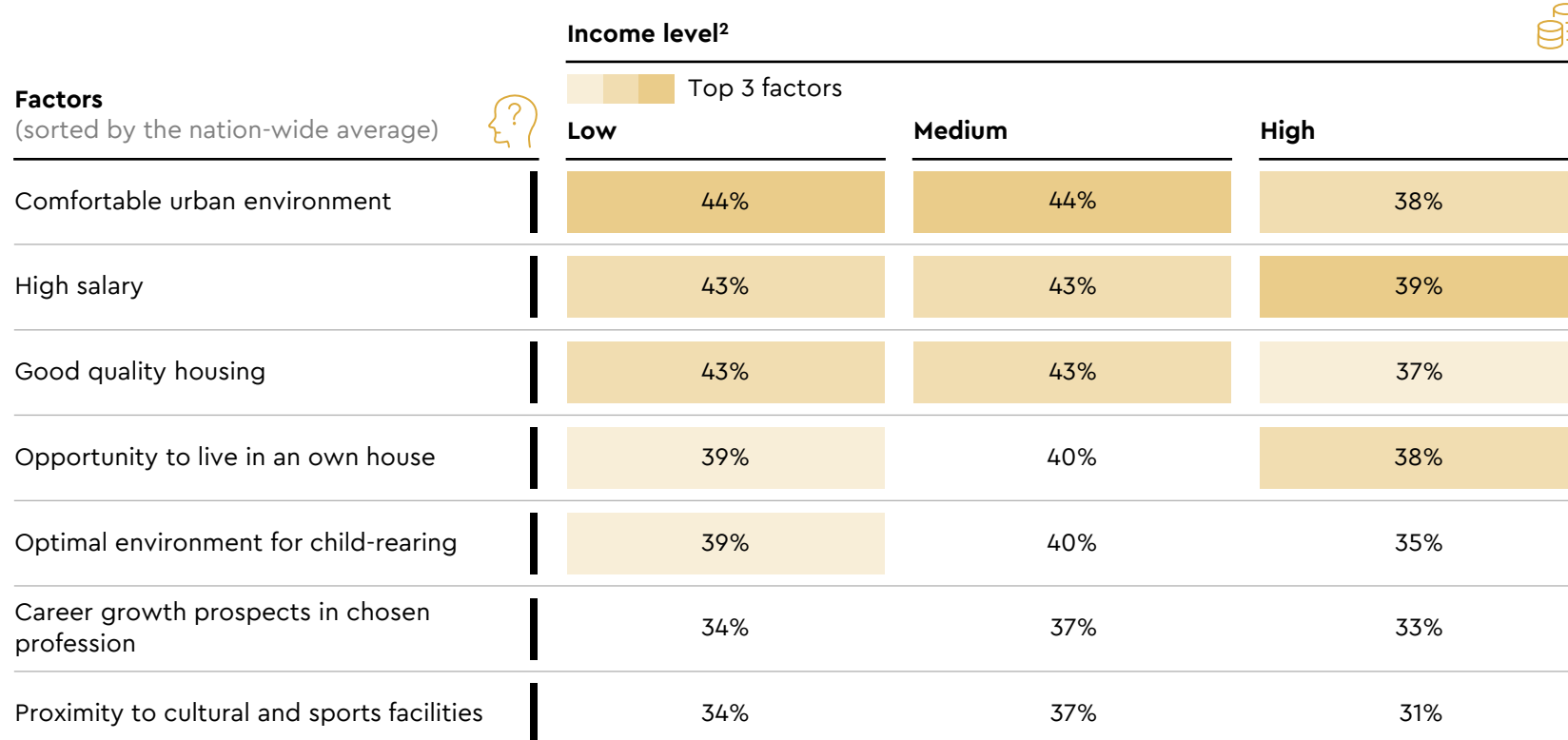
on a scale of 1 to 5, where 1 stands for "It could have no bearing on my decision" and 5 stands for "I would be ready to relocate to a small town"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

When considering relocation to a small town, Russian citizens with high income levels attach a lot of importance to living in an own house

"Please rate the factors that could motivate you to relocate to a small town¹ in Russia"

The share of the respondents who selected 4 or 5



High-income individuals value an opportunity to live in an own house **(38%)**

1. A small town is defined as having a population of up to 100,000 residents

2. Low income – RUB 20,000 or less per family member; medium income – RUB 20,001–80,000; high income – RUB 80,001 or higher

Question: "Please rate the factors that could motivate you to relocate to a small town in Russia (up to 100,000 residents)


on a scale of 1 to 5, where 1 stands for "It could have no bearing on my decision" and 5 stands for "I would be ready to relocate to a small town"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024


37% of Moscow and St. Petersburg residents would relocate to a small town in order to live in an own house

"Please rate the factors that could motivate you to relocate to a small town¹ in Russia"

The share of the respondents who selected 4 or 5

Geostrata 

Top 3 factors

Factors (sorted by the nation-wide average) 	Moscow + St. Pete	Million-plus cities	Other regions (cities with 100,000+ residents)
Comfortable urban environment	40%	40%	44%
High salary	39%	40%	43%
Good quality housing	36%	39%	43%
Opportunity to live in an own house	37%	35%	40%
Optimal environment for child-rearing	35%	36%	40%
Career growth prospects in chosen profession	33%	34%	36%
Proximity to cultural and sports facilities	33%	34%	36%

Up to **40%** of our respondents from Moscow and St. Petersburg would be ready to move to a small town

Top factors that could drive our respondents to relocate are a comfortable urban environment, high incomes, and an opportunity to live in an own house, with minor differences across the shares of respondents from different cities

1. A small town is defined as having a population of up to 100,000 residents

Question: "Please rate the factors that could motivate you to relocate to a small town in Russia (up to 100,000 residents) on a scale of 1 to 5, where 1 stands for "It could have no bearing on my decision" and 5 stands for "I would be ready to relocate to a small town"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

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The new Russian society: consumer pulse survey

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