



Yakov and Partners × Romir

The new Russian society: consumer spending and brands

September 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 6.

Changes in prices and spending

01

Respondents have been cutting back on non-essential spending and intend to do so in the future

Most respondents spent the past year in the savings mode and intend to be even more frugal in the next six months. Most often they cut non-essential spending, such as luxury goods, international travel, entertainment, and home appliances. But there's one category of non-essential expenses that is sacred, namely, pet goods. None of the respondents are willing to reduce spending on their pets' wellbeing, regardless of the age group, income level, or place of residence

Every year, Russian citizens gear up to save more, but their intentions fail to materialize every time. Although each year 21% to 26% of our respondents intend to reduce spending on luxury goods and international travel, and another 7% to 8% plan to quit smoking and stop spending money on tobacco, the share of those who buy those products and services remained virtually unchanged over the past year

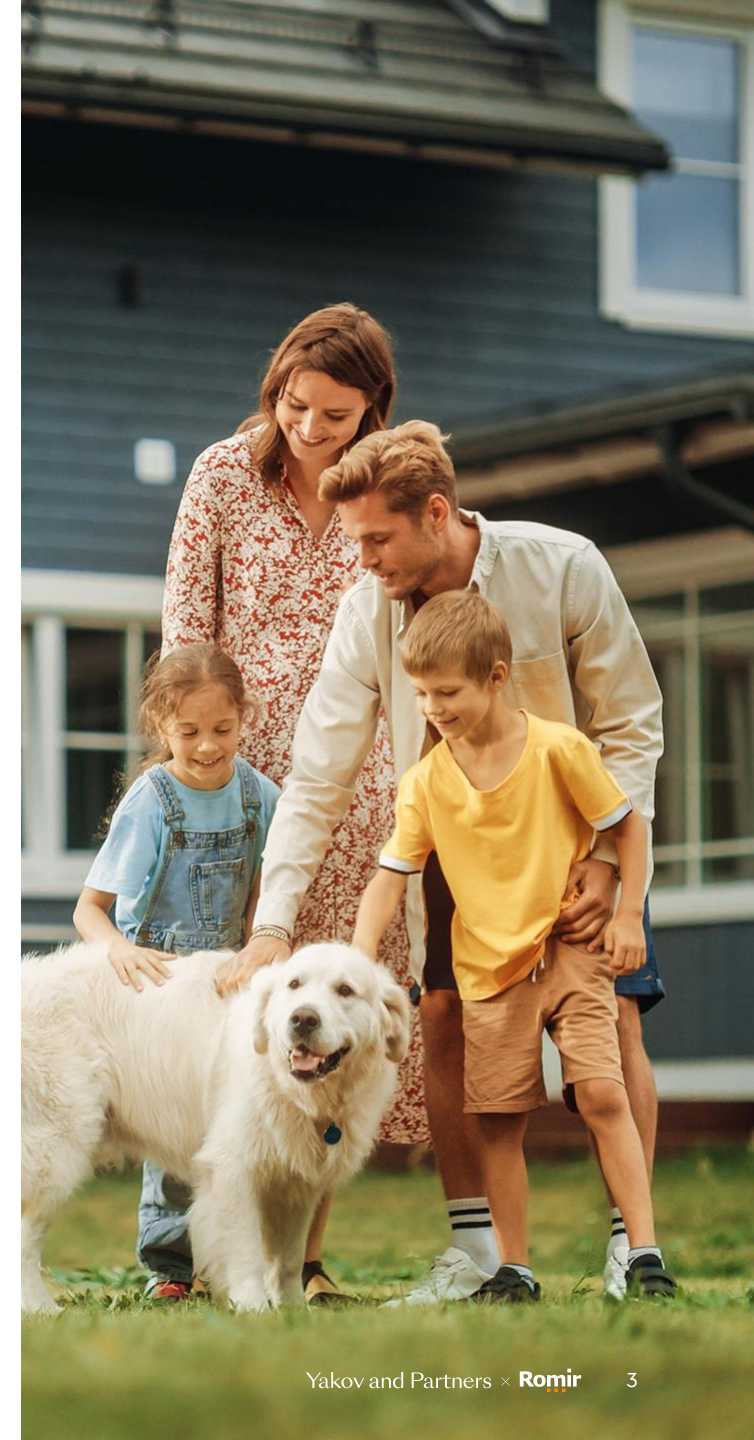
This inconsistency between the intentions and actions is evidenced by the data published by INFOLine, the Russian Union of Travel Industry, and the Federal Security Service, showing that spending on dining out and travel only increased over the past year

Global surveys reveal that the intention to reduce spending on dining out and luxury goods is shared by consumers across multiple countries

Zoomers seem to be the least frugal, senior generation the most; yet respondents across all generations are willing to splurge on their pets.

Respondents in all income groups reported dialing back spending on luxury goods





Respondents in all age groups, especially those aged above 38, expect essential spending on utilities and medicinal drugs to climb further







Respondents are willing to save up on anything but their pets

▲ XX Increased ▼ XX Decreased ○ XX No changes

"In what way has your spending changed over the past year?"¹, p.p.²

Categories	Spending	
	Past year	Next 6 months
 Eating in	▲ +25	▲ +13
Dining out	▼ -14	▼ -18
Tobacco goods and smoking accessories	▼ -2	▼ -9
 Clothing	▲ +2	▼ -2
Footwear	▲ +4	▼ -2
Luxury goods	▼ -32	▼ -30
 Children's goods	▼ -3	▼ -6
Pet goods	▲ +13	▲ +2
Cosmetics, perfumes, and personal care	○ 0	▼ -5
Medicinal drugs	▲ +23	▲ +11
Homeware	▲ +5	▼ -2
Home care products	▲ +12	▲ +2
 Real estate	▼ -16	▼ -13

Categories	Spending	
	Past year	Next 6 months
 Home appliances	▼ -18	▼ -18
Electronics	▼ -6	▼ -20
Healthcare services	▲ +13	▲ +5
 Beauty services	▼ -6	▼ -11
Leisure and entertainment	▼ -18	▼ -17
Education	▼ -11	▼ -11
Insurance	▼ -5	▼ -9
Internet and mobile services	▲ +22	▲ +9
Utilities	▲ +43	▲ +26
 Transport	▲ +8	▲ +2
Personal vehicles	▲ +8	○ -1
 Domestic travel	▼ -13	▼ -12
International travel	▼ -32	▼ -27

Respondents plan to cut non-essential spending:

- The share of the respondents who cut back on eating out was 14 p.p. higher than that of those who increased or maintained spending in this category. Even more respondents intend to reduce those expenses in the next 6 months as the gap reaches 18 p.p.
- Luxury goods, international travel, entertainment, and home appliances top the list of categories where respondents economize the most

Respondents expect that essential spending such as eating at home, utilities, internet and mobile services, healthcare services, and medicinal drugs will increase

The only category of non-essential spending where respondents are not ready to cut corners is pet goods

1. The metric was calculated by subtracting the share of those who chose options 3 and 4 ("My spending has decreased (will decrease) / I (will) no longer buy this item") from the share of those who chose options 1 and 2 ("My spending has increased (will increase) / My spending remains (will remain) the same")
 2. Percentage points

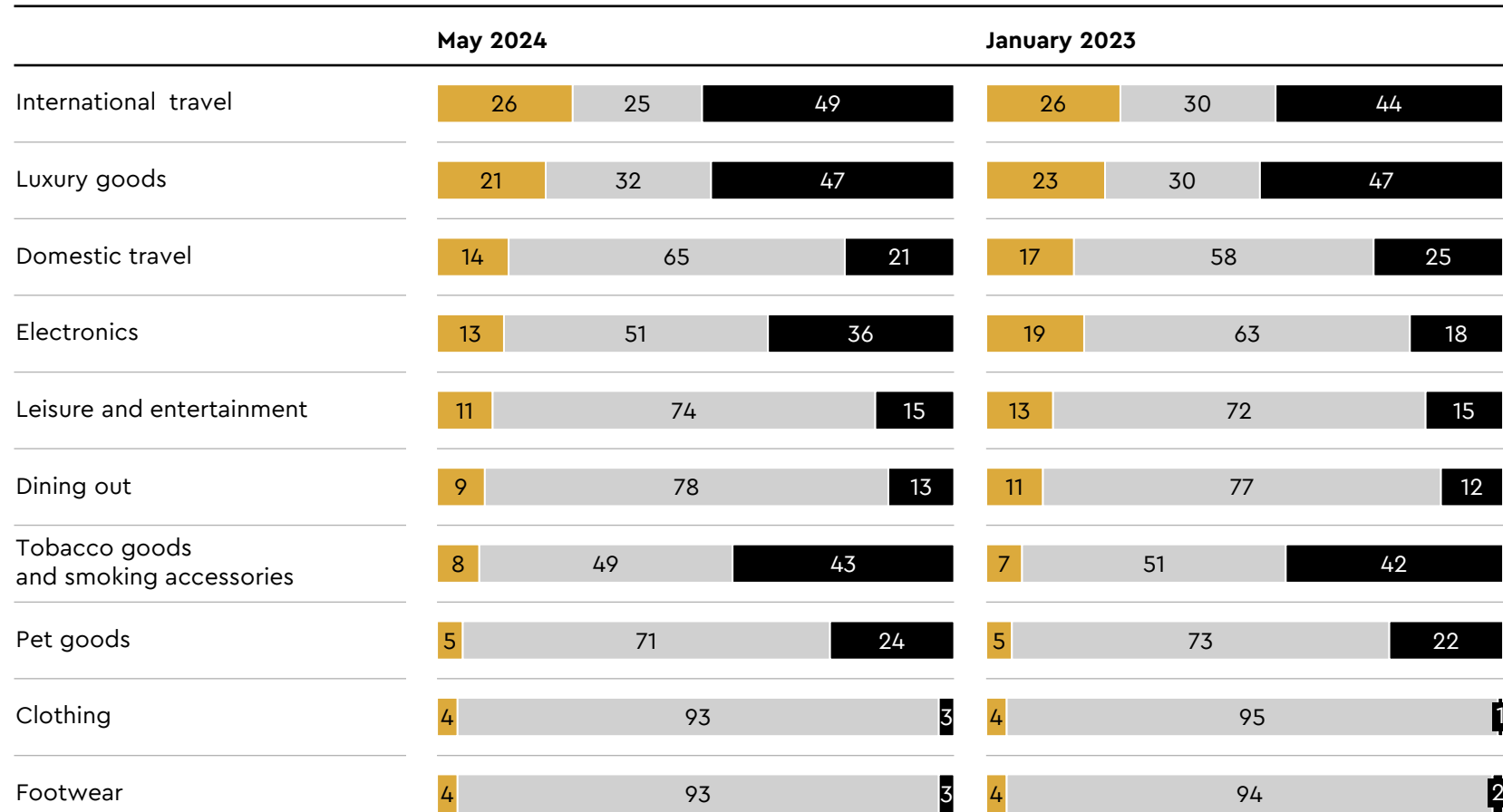
Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, January 2023 and May 2024

Question: "In what way has your spending in the following categories changed over the past year? In what way do you expect your spending to change over the next 6 months?"

Every year consumers gear up to cut back on spending, yet fail every time

■ No longer buy
 ■ Keep buying
 ■ Never did

"In what way has your spending in the following categories changed over the past year?"¹, %



1. The metric was calculated as follows: the share of those who stopped buying goods or services in the respective category; the share of those who increased/decreased or maintained their spending in the category; and the share of those who never bought those goods or services

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, January 2023 and May 2024

Question: "In what way has your spending in the following categories changed over the past year?"







Every year respondents report plans to tighten their belts. The proportions of those willing to cut spending in different categories are as follows:

- 26% are ready to cut back on international travel
- 21–23% luxury goods
- 11–13% leisure and entertainment
- 9–11% dining out
- 7–8% tobacco (respondents plan to quit smoking or reduce tobacco spending)

And yet the next year the share of those who keep buying or have only recently stopped buying items in the respective categories remains virtually unchanged (53% for luxury goods, 85% for leisure and entertainment)

The opposite trend is observed for domestic travel: despite the intentions to dial back spending in this category, the number of those who keep buying respective services has only increased

Respondents fail to follow through on their savings intentions, especially when it comes to travel and dining out

Responses by category	Spending, May 2024 ¹	Facts speaking to the opposite
Dining out 	 -14 p. p.	"In 2023, the turnover of public dining facilities in Russia grew by 14% in comparable prices" ("Consumer markets", INFOLine)
Domestic travel 	 -13 p. p.	With a total of 78 million trips and a 20% increase vs. the previous year, 2023 marked a new record for domestic tourism. Such are the findings presented in the preliminary report of the Russian Union of Travel Industry (RUTI). Previous years, however, had seen even bigger boosts in tourism; according to RUTI statistics, 2015 and 2021 each marked a 30% increase
International travel 	 -32 p. p.	According to the Federal Security Service, in 2023 Russian citizens made 10.6% more trips to neighboring countries and 27.6% more trips to more distant countries

Last year, many respondents said that they actively worked to reduce their spending on dining out; the share of those who reported dialing back on such expenses exceeded that of those who intended to increase or maintain their spending on restaurants by 14 p.p. The same was said about travelling (-13 p. p. and -32 p. p. for domestic and foreign trips, respectively). Statistics, however, refute those assertions

This inconsistency between the intentions and actions may arise from the difference between expected and actual income levels ("There's no predicting the future, so we'd better be frugal"). Yet people tend to indulge when they have some money to spare

The intention to economize, however, is in itself detrimental to the potential growth of consumer spending

1. The metric was calculated by subtracting the share of those who chose options 3 and 4 ("My spending has decreased / I no longer buy this item") from the share of those who chose options 1 and 2 ("My spending has increased / My spending remains the same")

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, January 2023 and May 2024

Question: "In what way has your spending in the following categories changed over the past year?"

Respondents from different countries share the intention to economize on luxury goods and dining out¹

	Россия	China	India	Brazil	Germany	UK	US
Intentions to increase spending in the coming months	Internet and mobile services	Beauty services	Internet and mobile services	Personal vehicles	Insurance	Insurance	Personal vehicles
	Personal vehicles	Clothing	Electronics	Beauty services	Beauty services	Personal vehicles	Insurance
	Clothing	Insurance	Personal vehicles	Travel	Personal vehicles	Travel	Travel
	Insurance	Личный транспорт	Insurance	Insurance	Travel	Electronics	Internet and mobile services
	Beauty services		Luxury goods	Electronics		Beauty services	Beauty services
Intentions to reduce spending in the coming months	Travel	Internet and mobile services			Restaurants	Internet and mobile services	
	Luxury goods	Restaurants	Clothing	Internet and mobile services	Clothing	Luxury goods	Electronics
	Restaurants	Electronics	Travel	Luxury goods	Internet and mobile services	Clothing	Clothing
	Electronics	Предметы роскоши	Restaurants	Restaurants	Luxury goods	Restaurants	Restaurants

Respondents across most countries, including Russia, China, Brazil, Germany, and the UK provide similar responses regarding restaurants and luxury goods and share the intention to cut spending in those categories

The US and the UK stand out among other countries, including Russia, as their residents plan to increase insurance and travel expenses

Respondents in Russia intend to cut back on travel spending; a comparable situation is observed only in India

Much like respondents in China, respondents from Russia intend to boost their spending on clothing and beauty, yet reduce their spending on electronics

1. For other countries: BCG CCI Global Consumer Sentiment Barometer, 2Q_2024, n = 6,090 (excluding Russia). Calculated based on the data on expected changes in spending over the coming months (specific timeframes vary by category). Comparison is based on 9 of the 11 categories within the survey scope (excluding "Snacks" and "Beverages")
For Russia: Question: "In what way do you expect your spending to change over the next 6 months?" (9 expense categories)

Zoomers seem to be the least frugal, senior generation the most

"In what way has your spending in the following categories changed over the past year?"¹, p. p.

 Top 3 categories

Categories <small>sorted by the nation-wide average)</small>	Generations ²			
	Z	Y	X	Senior generation
Eating in	11	20	28	34
Dining out	5	-7	-18	-29
Tobacco goods and smoking accessories	0	0	-3	1
Clothing	15	2	0	4
Footwear	14	2	4	8
Luxury goods	-16	-26	-38	-36
Children's goods	-5	5	-9	-4
Pet goods	16	6	17	26
Cosmetics, perfumes, and personal care	10	2	-3	-2
Medicinal drugs	16	16	26	39
Homeware	4	5	4	4
Home care products	14	8	12	21
Real estate	2	-13	-18	-26
Home appliances	-2	-14	-20	-23
Electronics	17	-3	-8	-15
Healthcare services	8	9	13	24
Beauty services	-1	-6	-7	-3
Leisure and entertainment	-4	-13	-21	-26
Education	-8	-10	-9	-27
Insurance	-11	-6	-3	-5
Internet and mobile services	21	19	22	32
Utilities	37	32	47	60
Transport	18	7	9	7
Personal vehicles	7	7	8	13
Domestic travel	-5	-14	-14	-7
International travel	3	-27	-35	-52

No generation reported cutting back on pet expenses

Most zoomers increased their spending on restaurants, electronics, and trips abroad; the proportions of those who either increased or maintained their spending in the above categories grew by 5 p.p., 17 p.p., and 3 p.p., respectively. At the same time education-related expenses dropped by 8 p.p. Respondents in all other age groups reported cutting back on dining out

Respondents aged above 38 felt the rising spending on medicinal drugs more than their younger counterparts

The older the respondents, the more likely they are to report cutting spending on dining out and increasing their spending on eating in

1. The metric was calculated by subtracting the share of those who chose options 3 and 4 ("My spending has decreased / I no longer buy this item") from the share of those who chose options 1 and 2 ("My spending has increased / My spending remains the same")
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)

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

Question: "In what way has your spending in the following categories changed over the past year?"

Respondents in all income groups dialed back spending on luxury goods over the past year

"In what way has your spending in the following categories changed over the past year?"¹, p. p.

 Top 3 categories

Categories <small>sorted by the nation-wide average)</small>	Income level ²		
	Low	Medium	High
Eating in	26	27	22
Dining out	-27	-13	3
Tobacco goods and smoking accessories	1	0	-6
Clothing	-8	4	6
Footwear	-3	5	8
Luxury goods	-23	-34	-25
Children's goods	0	-1	-5
Pet goods	16	15	14
Cosmetics, perfumes, and personal care	-2	0	6
Medicinal drugs	24	26	17
Homeware	0	7	7
Home care products	13	13	8
Real estate	-29	-14	-11
Home appliances	-29	-16	-13
Electronics	-11	-2	-9
Healthcare services	9	16	9
Beauty services	-14	-5	-3
Leisure and entertainment	-31	-15	-12
Education	-6	-10	-10
Insurance	-4	-3	-2
Internet and mobile services	25	24	19
Utilities	47	46	31
Transport	6	10	5
Personal vehicles	4	11	3
Domestic travel	-24	-11	-7
International travel	-26	-34	-20

Respondents across all income groups postponed purchases of durable goods (home appliances and real estate) and reduced non-essential spending. The proportions of those who increased or maintained spending dropped by 23–34 p.p. in the luxury goods category, 3–14 p.p. in the beauty category, and 12–31 p.p. in entertainment. It seems that conspicuous consumption is going out of style

High-income respondents more often reported increasing spending on dining out, clothing, and footwear (respective differences of 3 p.p., 6 p.p., and 8 p.p.)

1. The metric was calculated by subtracting the share of those who chose options 3 and 4 ("My spending has decreased / I no longer buy this item") from the share of those who chose options 1 and 2 ("My spending has increased / My spending remains the same")
2. Low income – RUB 20,000 or less per family member; medium income – RUB 20,001–80,000; high income – RUB 80,001 or more

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

Question: "In what way has your spending in the following categories changed over the past year?"

Respondents expect their spending on utilities, medicinal drugs, and food to climb

"In what way do you expect your spending to change over the next 6 months"¹, p. p.

 Top 3 categories

Categories <small>sorted by the nation-wide average)</small>	Income level ²			
	Z	Y	X	Senior generation
Eating in	4	8	14	27
Dining out	-14	-14	-20	-25
Tobacco goods and smoking accessories	-13	-10	-9	-6
Clothing	1	-2	-3	1
Footwear	-3	-3	-2	1
Luxury goods	-11	-26	-33	-41
Children's goods	2	0	-10	-17
Pet goods	3	-3	3	15
Cosmetics, perfumes, and personal care	-1	-5	-6	-2
Medicinal drugs	4	3	13	31
Homeware	-3	-4	-2	3
Home care products	-6	-1	3	11
Real estate	-6	-10	-15	-18
Home appliances	-7	-15	-19	-23
Electronics	-13	-17	-20	-29
Healthcare services	8	2	6	15
Beauty services	-6	-12	-12	-6
Leisure and entertainment	-13	-13	-19	-23
Education	-4	-8	-12	-28
Insurance	-9	-10	-8	-6
Internet and mobile services	5	5	10	19
Utilities	10	16	31	45
Transport	0	-1	3	4
Personal vehicles	-4	-3	-2	12
Domestic travel	-3	-14	-11	-13
International travel	-12	-23	-28	-43

Respondents across all generations intend to cut back on dining out, but the senior generation seems to be the most categorical about such expenses; participants in this age group are 25 p.p. more likely to have plans to reduce such spending. At the same time, all generations intend to cook and eat at home more often; the proportion of those who plan to increase spending on eating in rose by 4–27 p.p.

Respondents expect further spending hikes on medicines (+3 to 4 p.p. among the younger generations and +31 p.p. among senior citizens) and utilities (+10 p.p. among the younger generations and +45 p.p. among senior citizens). Respondents in all generations share the intention to dial back non-essential spending, especially international travel (-12 p.p. among generation Z and -43 p.p. among the senior generation)

1. The metric was calculated by subtracting the share of those who chose options 3 and 4 ("My spending has decreased / I no longer buy this item") from the share of those who chose options 1 and 2 ("My spending has increased / My spending remains the same")
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)

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

Question: "In what way do you expect your spending to change over the next 6 months?"

Sections 7 and 8.

Brand substitution and favorite brand

01

All present and correct: almost half of our respondents did not notice any changes in the mix of brands in their shopping basket

Zoomers were the most likely to report changes to the assortment of brands in their consumer basket

All in all, respondents tend to be satisfied with the replacements for their favorite foreign brands; the proportion of those who are happy with the substitutes outnumbers those who are dissatisfied across all categories. The level of satisfaction is the highest in food and non-alcoholic beverages, and the lowest in the transport category

Satisfaction with the new brand mix increases along with income levels

Respondents from million-plus cities are somewhat less happy with the brand assortment and quality of substitutes than residents of other populated areas

02

Russian consumers favor domestic FMCG brands, relying on Russian-made food products and beverages

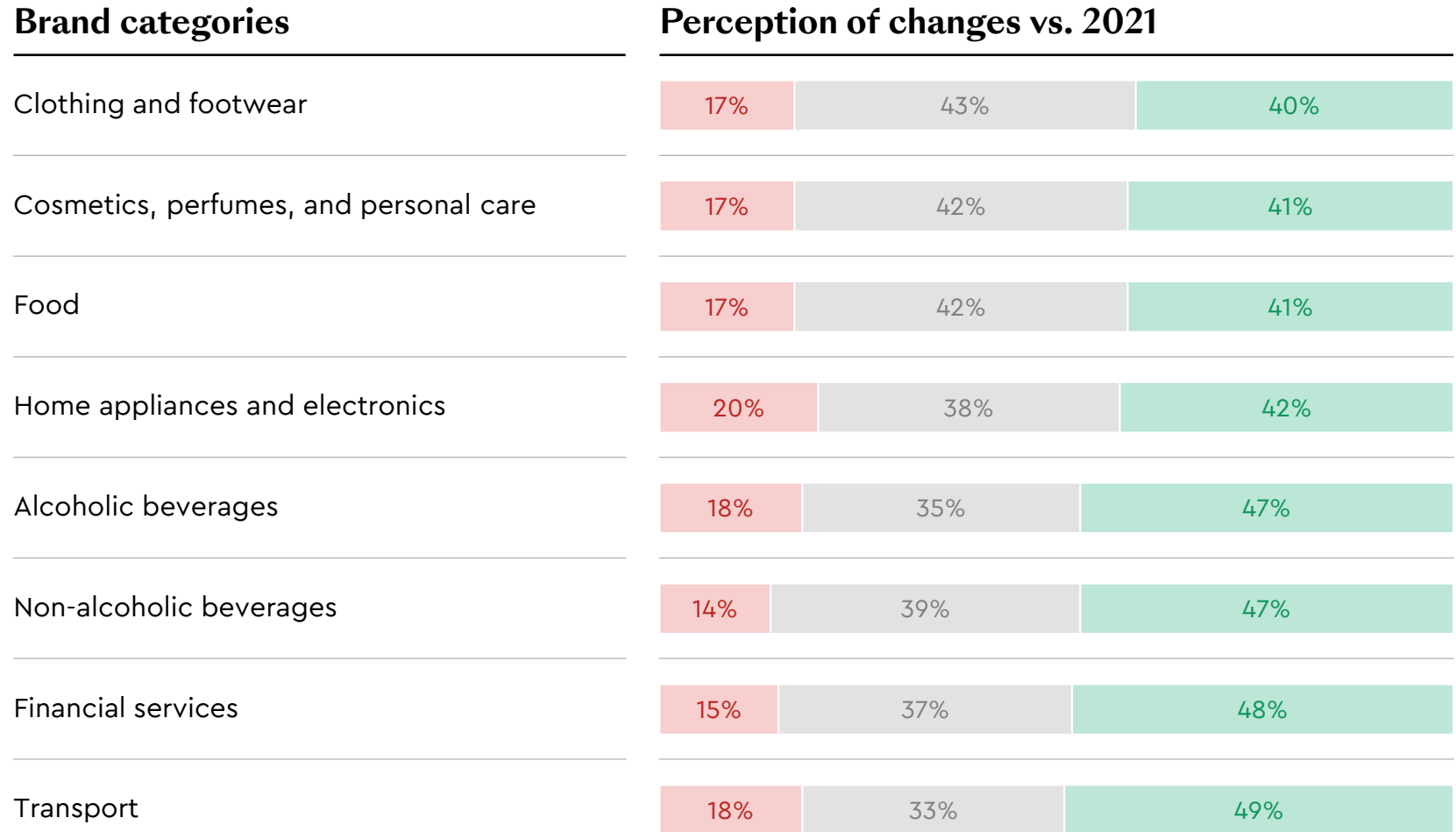
The most successful contenders for consumer affection in the food and beverage categories are Chernogolovka, Dobry, Prostokvashino, Miratorg, and Makfa

As to clothing, home appliances, electronics, and cosmetics, respondents still have a soft spot for foreign brands (Adidas, Samsung, L'Oréal), even those that exited the Russian market

Sber and Toyota are well ahead of their competitors in the banking and automotive segments

Almost half of our respondents did not notice any changes in the mix of brands in their shopping basket

Major changes Minor changes No changes



Among our respondents, 40% to 49% did not notice any changes to the mix of brands in their shopping basket; another 33% to 43% consider those changes minor



Most respondents reported changes in the brand mix in such categories as clothing and footwear (60%), cosmetics, perfumes, and personal care (59%), food (59%), and home appliances and electronics (58%)

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

Question: "In terms of brand mix in each category, to what extent has your consumer basket changed compared to 2021?" (On a scale of 1 to 3, where 1 = "No changes", 3 = "Major changes")

Among our respondents, zoomers were the most likely to report changes to the brand mix in their consumer basket

Perception of changes since 2021¹

Brand categories 	Generations ² 			
	Z	Y	X	Senior generation
Clothing and footwear	69%	59%	60%	55%
Cosmetics, perfumes, and personal care	63%	59%	60%	56%
Food	67%	60%	58%	54%
Home appliances and electronics	62%	57%	59%	56%
Alcoholic beverages	53%	53%	54%	46%
Non-alcoholic beverages	68%	55%	53%	46%
Financial services	57%	53%	53%	45%
Transport	52%	51%	52%	42%

Zoomers seem to have perceived changes more intensely than others, most frequently reporting changes in such categories as clothing and footwear, non-alcoholic beverages, food, cosmetics, perfumes, and personal care (63% to 69%)

In contrast, senior respondents were the least likely to have noticed any changes in the brand mix in their consumer basket, particularly in the transport category (42%)

1. This metric was calculated as the share of the respondents who chose options 2 ("Minor changes") and 3 ("Major changes")

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)

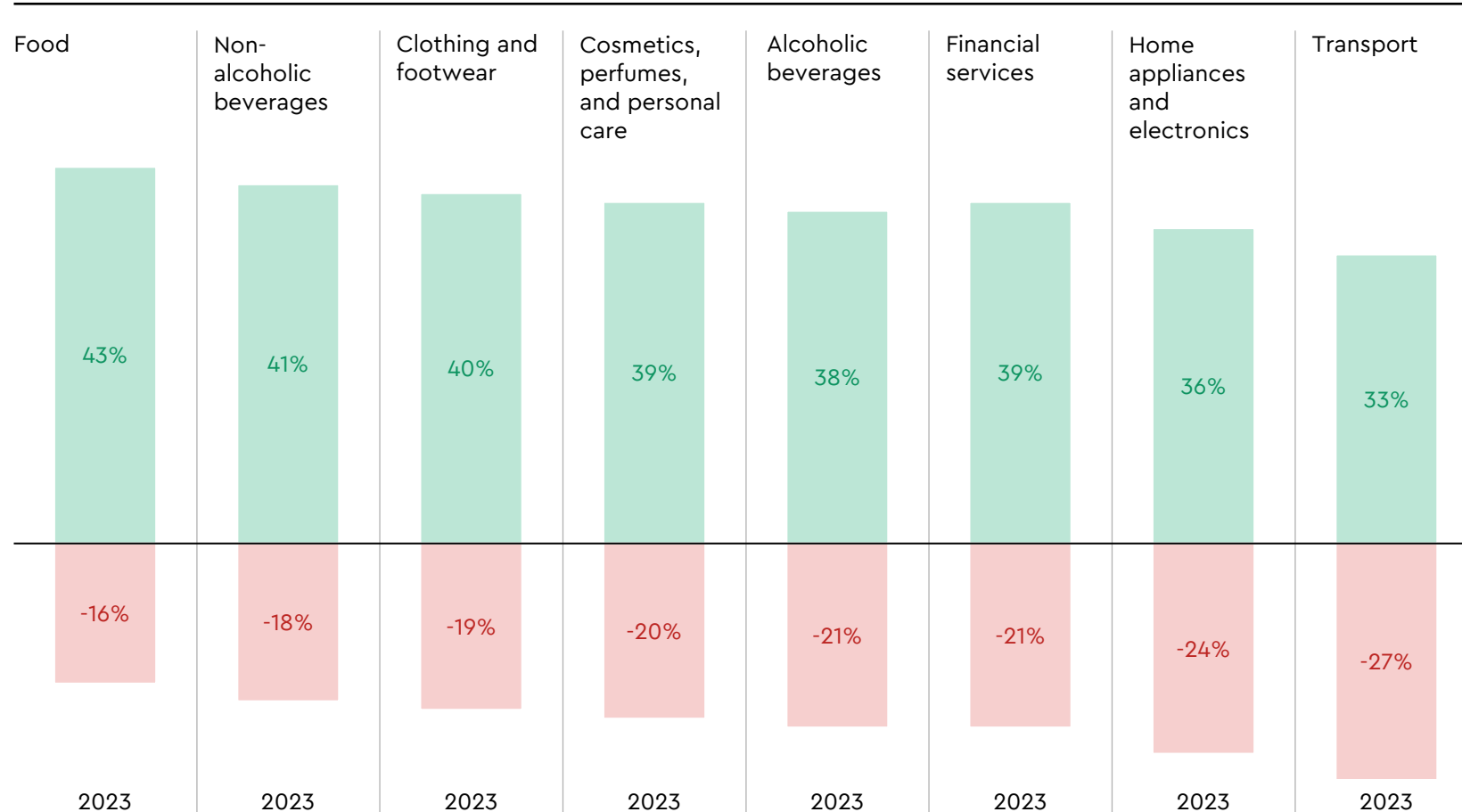
Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, May 2024

Question: "In terms of brand mix in each category, to what extent has your consumer basket changed compared to 2021?"
(On a scale of 1 to 3, where 1 = "No changes", 3 = "Major changes")

Russian citizens are the least satisfied with brand substitution in the transport category

■ Share of the respondents who chose options 1 and 2, where 1 = "Not satisfied at all", %
 ■ Share of the respondents who chose options 4 and 5, where 5 = "Completely satisfied", %

Categories of goods and services



Our respondents are the most satisfied with brand substitution in the segments of food and non-alcoholic beverages

Those respondents who are satisfied with brand substitution outnumber those who are not across all categories

Respondents are the least satisfied with brands and quality of goods in such categories as home appliances and electronics and transport (the gap between those satisfied and dissatisfied calculated at a respective 12 p.p. and 6 p.p.)



Satisfaction with brand substitution seems to vary very slightly across categories regardless of respondents' age, gender, or income level, although those aged above 38 are somewhat more likely to feel satisfied with brand substitution

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

Question: "To what extent are you satisfied with the new brand mix and quality of individual goods available in this category?"
(On a scale of 1 to 5, where 1 = "Not satisfied at all", 5 = "Completely satisfied")

Satisfaction with the new brand mix increases along with income levels

Satisfaction with the new brand mix and quality of individual goods, p. p.¹

Brand categories 	Income level ² 		
	Low	Medium	High
Food	14	31	33
Non-alcoholic beverages	13	26	33
Clothing and footwear	11	24	26
Cosmetics, perfumes, and personal care	8	22	21
Financial services	6	20	28
Alcoholic beverages	7	21	23
Home appliances and electronics	3	14	19
Transport	-4	7	9

1. The metric was calculated by subtracting the share of those who chose options 1 and 2 from the share of those who chose options 4 and 5

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

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

Question: "To what extent are you satisfied with the new brand mix and quality of individual goods available in this category?"

(On a scale of 1 to 5, where 1 = "Not satisfied at all", 5 = "Completely satisfied")


Although we expected high-income respondents to show the strongest dissatisfaction with the exit of foreign brands, the gap between satisfied and dissatisfied respondents across all brand categories in this income bracket was more than double that in the low-income bracket. In all likelihood the more affluent respondents have found either alternative delivery channels or replacements for the runaway brands


High-income respondents are the most satisfied with the current brand mix in the food and non-alcoholic beverages categories (the proportion of those who are satisfied is 33 p. p. higher than that of those who feel discontented)

Consumers in the low income bracket are the most likely to be unhappy with the new brand mix, especially in transport, where the proportion of dissatisfied respondents is 4 p. p. higher than that of those who are happy

Respondents from big cities are the least happy with the changes to the brand assortment

Satisfaction with the new brand mix and quality of individual goods¹, p. p.

Geostrata 

Brand categories 	Moscow + St. Pete	Million-plus cities	Smaller cities and towns
Food	27	26	28
Non-alcoholic beverages	24	20	24
Clothing and footwear	17	21	22
Cosmetics, perfumes, and personal care	18	17	20
Financial services	18	17	18
Alcoholic beverages	21	16	18
Home appliances and electronics	8	12	13
Transport	4	5	7

Residents of million-plus cities are somewhat less satisfied with the new brand mix and quality of substitutes than respondents in other populated areas. Residents of smaller cities and towns tend to be the most satisfied with the quality of substitutes

In the transport category, however, the strongest dissatisfaction was evident among respondents from Moscow and St. Petersburg

The biggest gap in brand replacement satisfaction was revealed in the clothing/footwear and electronics categories (5 p. p.). In both categories respondents from Moscow and St. Petersburg showed the strongest dissatisfaction with brand substitution

1. The metric was calculated by subtracting the share of those who chose options 1 and 2 from the share of those who chose options 4 and 5

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

Question: "To what extent are you satisfied with the new brand mix and quality of individual goods available in this category?"
(On a scale of 1 to 5, where 1 = "Not satisfied at all", 5 = "Completely satisfied")

Domestic food and beverage brands are the most successful contenders for consumer affection



Brands that respondents would like to return

X,X% Share of the respondents who chose the brand

Food

1	Prostokvashino	4,0%
2	Miratorg	3,7%
3	Makfa	2,6%
4	Cherkizovo	
5	DANONE	
6	Papa Mozhet	
7	No opinion	
8	Vyazanka	
9	Ermolino	
10	Nestlé	

Non-alcoholic beverages

1	Chernogolovka	14,7%
2	Dobry	11,0%
3	Coca-Cola	7,1%
4	Cola ¹	
5	Pepsi	
6	Fanta	
7	Sady Pridonya	
8	Sprite	
9	Svyatoy Istochnik	
10	RICH	

Alcoholic beverages

1	Martini	5,7%
2	Baltica	4,4%
3	No opinion	2,9%
4	Abrau-Durso	
5	Whisky ¹	
6	Hennessy	
7	Beer ¹	
8	Wine ¹	
9	Brandy ¹	
10	Jack Daniel's	

Of all foreign brands, only Martini and Coca-Cola remained in the top three in their respective categories of alcoholic and non-alcoholic beverages

Just as last year, the top three in the food category consists solely of Russian brands; however, Krasnaya Tsena and Papa Mozhet have been ousted by Prostokvashino and Makfa

Chernogolovka and Dobry made it to the list of favorite brands in record time, leaving behind Coca-Cola and Pepsi


There are no such pronounced preferences in the alcoholic beverages segment. Many respondents picked their favorite type of product rather than a specific brand, while "No opinion" rounds out the top three answers


1. Many respondents indicated their favorite type of product rather than a specific brand

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, January 2023 and May 2024

"Please indicate your favorite brands in the following categories of products and services (top 1, top 2, top 3)";
"Which brand in this category would you most like to return to the Russian market?"

Respondents have a clear preference for foreign clothing, electronics, and cosmetics brands

 Brands that respondents would like to return

 January 2023 survey results

X,X% Share of the respondents who chose the brand

Clothing and footwear

1	Adidas	1	Adidas	9,8%
2	Zara	2	Nike	8,4%
3	Nike	3	Zara	7,0%
4	O'STIN			
5	H&M			
6	Gloria Jeans			
7	Puma			
8	Kari			
9	No opinion			
10	Reebok			

Home appliances and electronics

1	Samsung	1	Samsung	27,9%
2	Apple	2	Apple	9,6%
3	Xiaomi	3	Bosch	6,6%
4	LG			
5	Bosch			
6	SONY			
7	HONOR			
8	ASUS			
9	HUAWEI			
10	LENOVO			

Cosmetics

1	L'Oréal	4,9%
2	Nivea	4,7%
3	Chanel	3,9%
4	Dior	
5	Chistaya Liniya	
6	L'Etoile	
7	No opinion	
8	Avon	
9	Cherny Zhemchug	
10	Gillette	

Despite the departure of foreign brands, respondents still have a soft spot for them. The clothing and electronics/home appliances categories have the most brands that respondents would like to come back

Just as last year, Germany's Adidas tops the ranking (9.8%), while Spain's Zara and the American Nike remained in the top three

Korea's Samsung and LG and China's Xiaomi, HONOR, HUAWEI, and LENOVO are the most popular brands of electronics and home appliances (Samsung was chosen by nearly every third respondent, or 27.9%)

The cosmetics category is also dominated by foreign brands, yet preferences are far less polarized. Although L'Oréal holds the top spot, it is only 2.1 p. p. ahead of Chistaya Liniya, which is ranked fifth. The seventh most popular answer was "No opinion"

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, January 2023 and May 2024

"Please indicate your favorite brands in the following categories of products and services (top 1, top 2, top 3)";
"Which brand in this category would you most like to return to the Russian market?"

Sber and Toyota are head and shoulders above competition in their respective categories



Brands that respondents would like to return



January 2023 survey results

X,X% Share of the respondents who chose the brand

Automobiles

1	Toyota	1	Toyota	12,8%
2	BMW	2	Mercedes	8,6%
3	LADA	3	BMW	7,7%
4	Mercedes			
5	KIA			
6	Hyundai			
7	NISSAN			
8	VOLKSWAGEN			
9	AUDI			
10	RENAULT			

Financial services

1	Sber	30,3%
2	T-Bank	12,6%
3 - 4	Alfa-Bank, VTB	12,2%
5	Gazprombank	2,5%
6	No opinion	
7	Sovcombank	
8	Otkritie	
9	Rosbank	
10	Raiffeisenbank	

Respondents still have a strong preference for Japanese and German cars. There has been some minor reshuffling on the leaderboard, with Mercedes dropping to the fourth spot and LADA climbing up to the top three

Every third respondent (30.3%) named Sber as their favorite brand. T-Bank, Alfa-Bank, and VTB were chosen by almost the same number of respondents (12.2% and 12.6%); they are far ahead of Gazprombank (2.5%), which comes next in the ranking. Among foreign brands, only Raiffeisenbank managed to retain its position in the top ten (1.1%)

Source: Russian consumer pulse check, a joint survey by Yakov and Partners and Romir Holding, January 2023 and May 2024

"Please indicate your favorite brands in the following categories of products and services (top 1, top 2, top 3)";
"Which brand in this category would you most like to return to the Russian market?"

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The new Russian society: consumer pulse survey

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