



Яков и Партнёры × РОМИР

# The new Russian society: consumer pulse survey

June 2024

## Consumer pulse survey profile



# Яков и Партнёры × **РОМИР**

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**.

## ~2700

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

# Section 2.

## Labor market

### Labor market sentiments

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Russian citizens feel confident in the labor market and have no fear of redundancies

Only **3%** of the respondents were made redundant last year, and just **4%** expect forced redundancies next year

The majority of Russian citizens (**60%**) put in the same amount of hours at work as last year

Russian citizens are more active and mobile on the labor market than citizens of other countries<sup>1</sup>: **39%** of Russians do not see themselves at their current place of employment one year down the line, while the global average<sup>1</sup> stands at just **28%**.

### Labor market drivers

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The top three reasons for changing jobs include striving for a higher salary (**26%**), work satisfaction (**18%**), and flexible working arrangements (**15%**)

### Labor market changes

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**55%** of the respondents made no efforts to improve their professional competencies last year

**2/3** of Russian citizens have not observed any new opportunities for professional growth or development since 2019

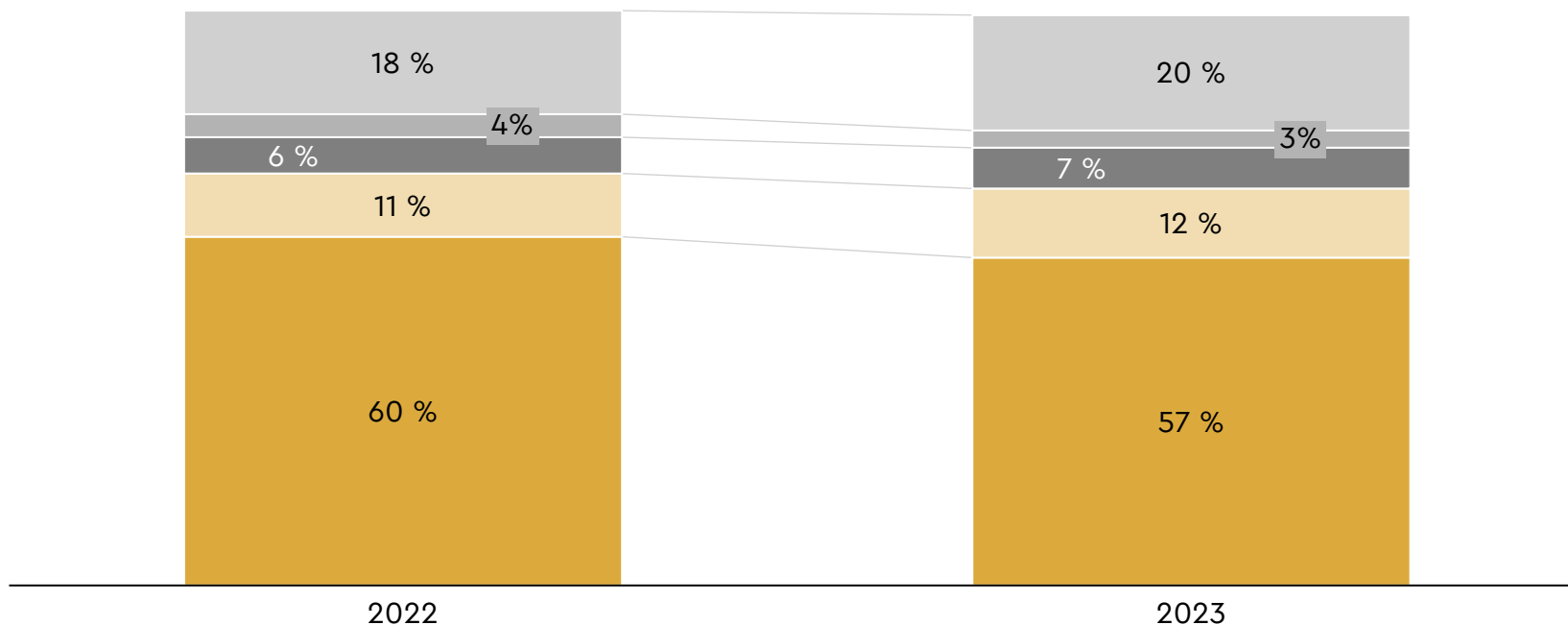
At the same time, **51%** of those who took pains to improve their skills also reported observing new opportunities in the labor market, while only **18%** of those who made no such efforts noticed the emergence of such opportunities

1. The sample included the USA, Canada, the UK, Germany, France, Germany, Japan, and India

# The respondents feel confident about their position on the labor market, regardless of age, income level, or place of residence

Employment changes that took place last year, share of the respondents, %

- Other options or No answer
- Changed jobs or In between jobs (redundancies)
- Voluntarily unemployed or Have my own business
- Changed jobs or In between jobs (voluntarily)
- Employed at the same place



The share of the respondents who changed jobs or are in between jobs following redundancies dropped from **4% to 3%**

Only **4%** of the respondents expect forced redundancies next year; **12%** of the respondents plan to change jobs of their own volition

The majority of Russian citizens feel confident about their position on the labor market, regardless of generation, income level, or place of residence.

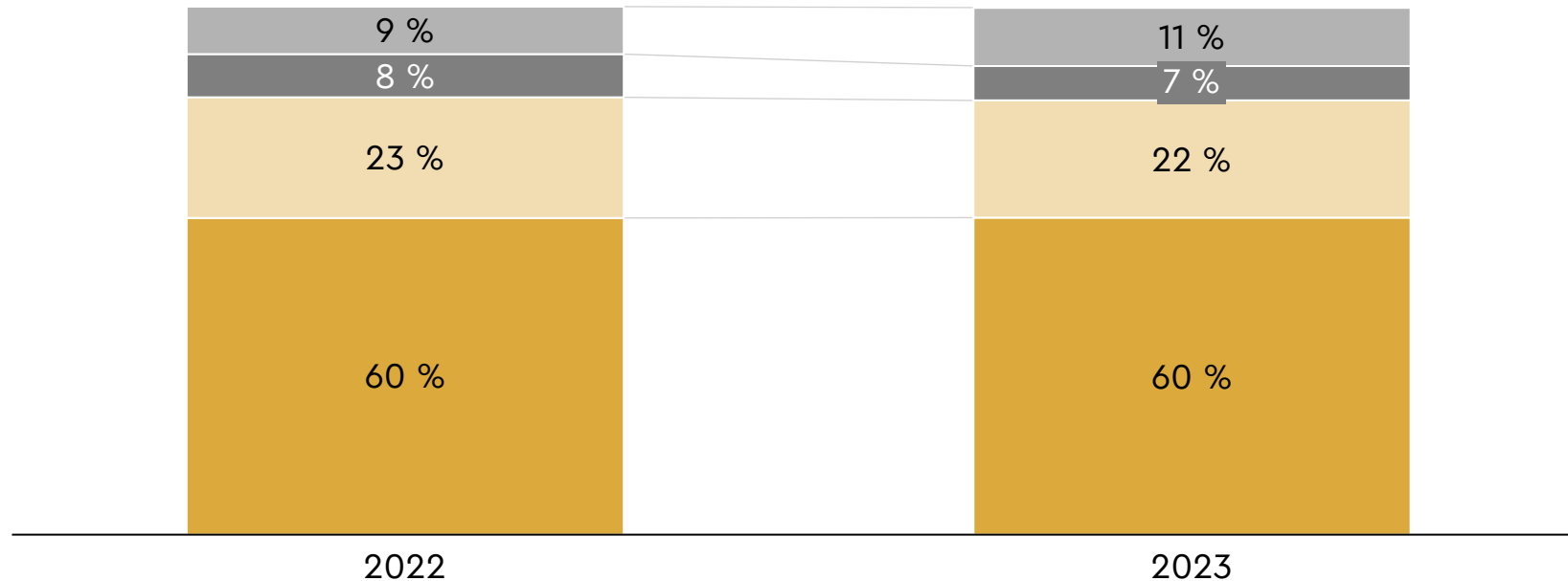
Question: "Did your employment situation change in any way during last year?"

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

# Most respondents keep putting in the same amount of hours at work

## Changes in working hours during last year, share of the respondents, %

- Other options or No answer
- Slight decrease or Marked decrease
- Slight increase or Marked increase
- No changes



The share of the respondents who indicated that they spent the same amount of time at work stands at **60%**, which is on a par with the previous year

Question: "Did your working hours change in any way during last year?"

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

# While half of Generation Z respondents said they had to work more, others keep putting in the same amount of hours

Changes in working hours during last year, share of the respondents, %

Options	Generations <sup>1</sup>			
	Z	Y	X	Senior generation
No changes	25%	54%	64%	<b>67%</b>
Slight increase or Marked increase	<b>50%</b>	24%	21%	16%
Slight decrease or Marked decrease	<b>25%</b>	7%	6%	8%
Other options or No answer	0%	<b>15%</b>	9%	9%

Just as in our previous survey, the results show that young people (Zoomers) started putting in significantly more hours, which reflects their joining the workforce and getting their first jobs

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)

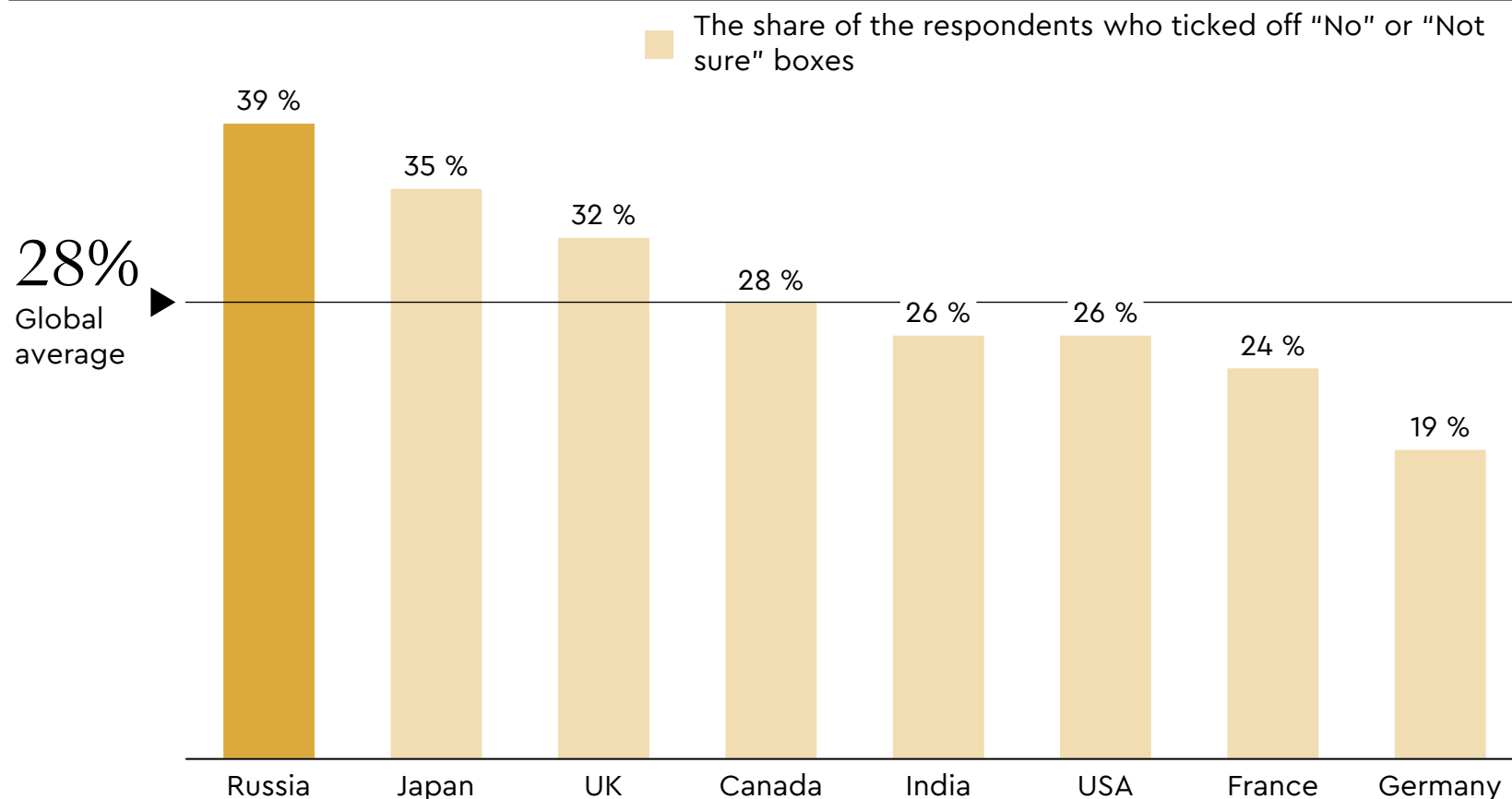
Question: "In what way did your working hours change last year?"

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

# Russian citizens are more active and mobile on the labor market than respondents in other countries

“Do you see yourself at your current place of employment one year down the line?”

Share of the respondents by country, %



The share of the respondents who do not see themselves in their current position one year down the line or are not sure about staying is markedly higher in Russia than across other nations in our sample

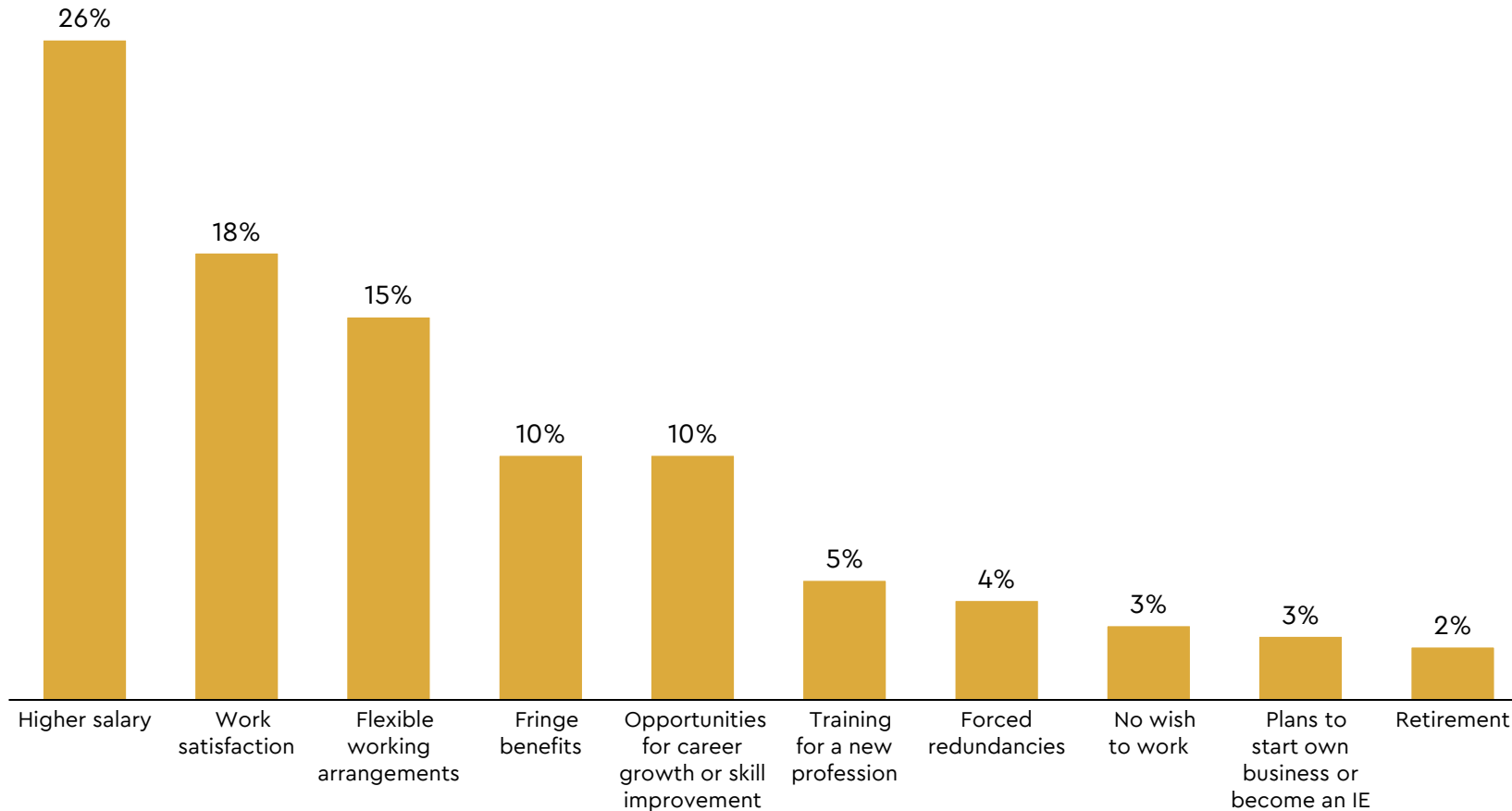
Since very few respondents in Russia expect redundancies in the foreseeable future, this indicator speaks to the fact that Russian citizens are much more mobile and actively looking into opportunities on the labor market

Question: “Do you see yourself at your current place of employment one year down the line?”

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

# Key reasons for changing jobs stem from respondents' wishes to earn more, realize their pull potential, or improve their employment conditions

Top 10 reasons for changing jobs in the coming year, share of the respondents, %



The top 5 reasons for changing jobs are connected to earning a higher income, self-fulfillment, or better working conditions

Only **3%** of the respondents feel no inclination to work

**3%** of the respondents want to start their own business or become an individual entrepreneur



Question: "Why do you expect to change jobs in the coming year?"

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



# Training for a new profession is the most popular reason for changing jobs among Zoomers; Generation Y members are the most driven to start their own business

Top 10 reasons for changing jobs in the coming year, share of the respondents by generation, %

Reason for changing jobs 	Generations <sup>1</sup> 			
	Z	Y	X	Senior generation
Higher salary	9%	<b>32%</b>	30%	7%
Work satisfaction	9%	<b>23%</b>	<b>23%</b>	7%
Flexible working arrangements	14%	15%	<b>18%</b>	4%
Fringe benefits	14%	6%	10%	<b>17%</b>
Better opportunities for career growth or skills improvement	<b>14%</b>	13%	10%	1%
Training for a new profession	<b>22%</b>	10%	11%	0%
Redundancy	1%	<b>6%</b>	2%	0%
No wish to work	0%	<b>5%</b>	4%	3%
Plans to start own business or become an IE	0%	<b>6%</b>	1%	2%
Retirement	0%	0%	0%	<b>33%</b>

Unlike other generations, the main reason for changing jobs among Zoomers is training for a new profession (**22%**)

Generation Y members are the most driven to launch their own business, with **6% planning to do so within one year**

They are followed by senior generation members, with 2% willing to start their own business or become an individual entrepreneur

The youngest generation is not yet ready to consider having their own business



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: "Why do you expect to change jobs in the coming year?"

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

# When changing jobs, high-income individuals more often than others strive for career growth and professional development

Top 10 reasons for changing jobs in the coming year, share of the respondents by income level, %

Reason for changing jobs 	Income level <sup>1</sup> 		
	Low	Medium	High
Higher salary	25%	24%	<b>35%</b>
Work satisfaction	15%	18%	<b>24%</b>
Flexible working arrangements	5%	<b>13%</b>	12%
Fringe benefits	9%	<b>13%</b>	3%
Better opportunities for career growth or skills improvement	8%	10%	<b>29%</b>
Training for a new profession	7%	10%	<b>12%</b>
Redundancy	3%	3%	<b>6%</b>
No wish to work	<b>5%</b>	3%	<b>5%</b>
Plans to start own business or become an IE	2%	5%	<b>6%</b>
Retirement	<b>3%</b>	2%	0%

Better career growth or skill improvement opportunities are one of the top reasons (**29%**) driving high-income individuals to change jobs

However, it did not even hit the top 3 reasons for changing jobs among low-income respondents

High-income respondents are three times as likely as low-income respondents to consider starting their own business, with **6% planning to do so within one year**

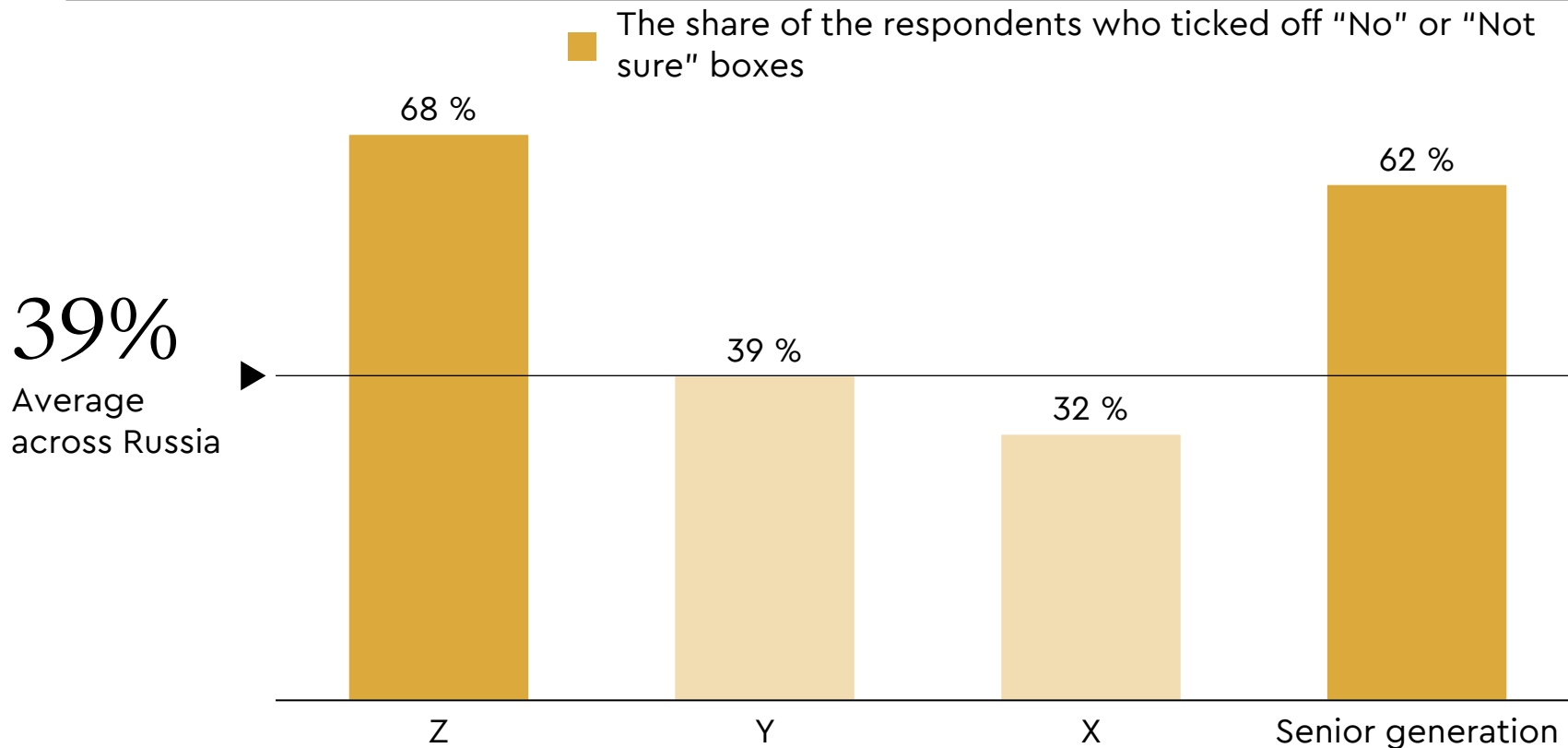
1. Low income – RUB 20,000 or less per family member; medium income – RUB 20,001–80,000; high income – RUB 80,001 or higher

Question: “Why do you expect to change jobs in the coming year?”

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

## Zoomers and senior respondents seem to be the most mobile on the labor market

“Do you see yourself at your current place of employment one year down the line?” Share of the respondents by generation, %



More than half of the respondents among Zoomers and senior generation do not see themselves in their current position one year down the line

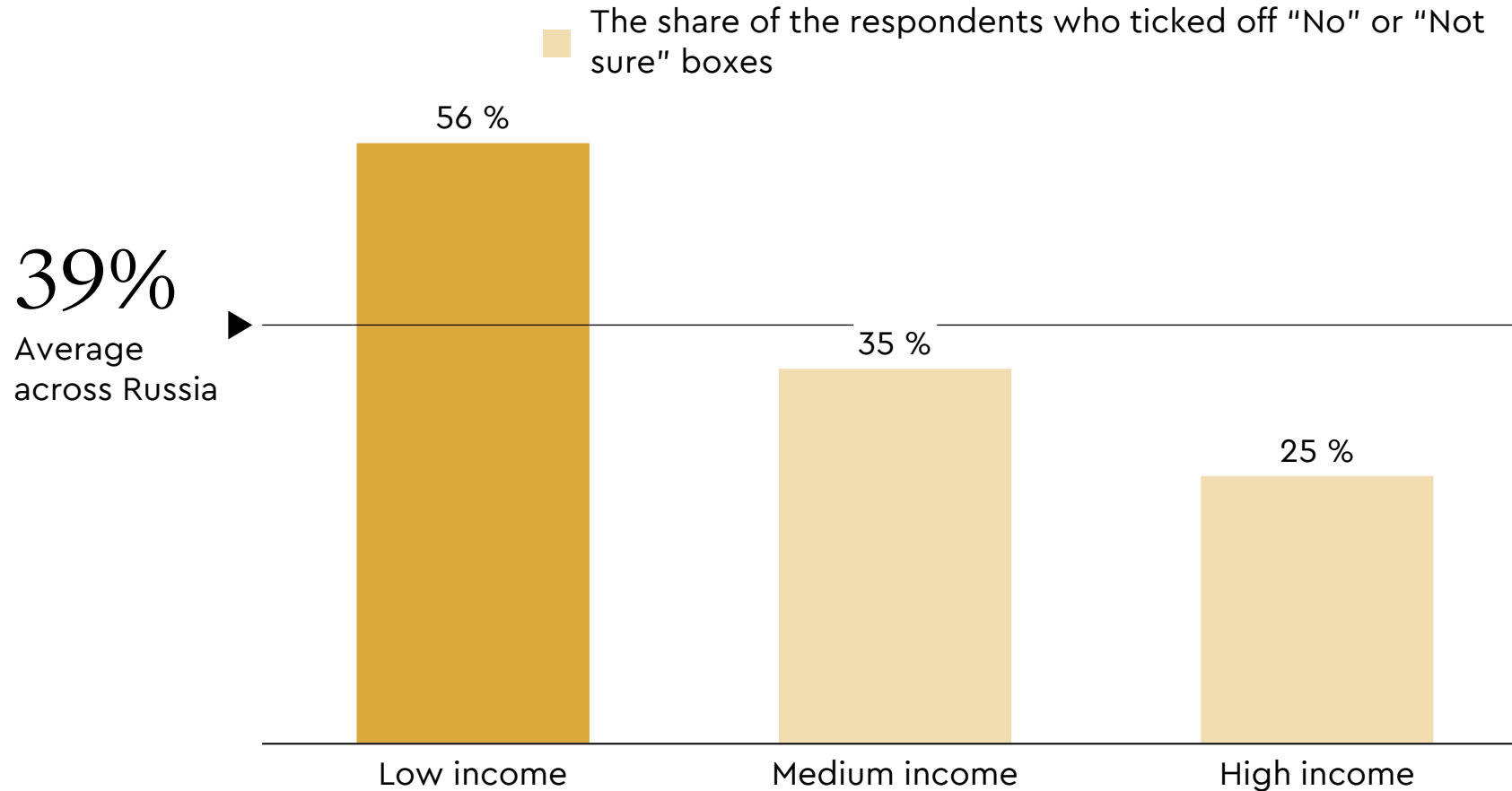
1. Generation Z (Zoomers) – 0–19 y.o. (18–19 y.o. in the poll); Y – 20–37 y.o.; X – 38–58 y.o.; senior generation – 59–78 y.o. (up to 64 y.o. in the poll)

Question: “Do you see yourself at your current place of employment one year down the line?”

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

# More than half of low-income respondents do not see themselves in their current position one year down the line

“Do you see yourself at your current place of employment one year down the line?” Share of the respondents by income, %<sup>1</sup>



The share of low-income respondents who do not see themselves staying at the same job for another year or are not sure about staying stands at **56%**, whereas the same indicator for high-income respondents stands at just **25%**

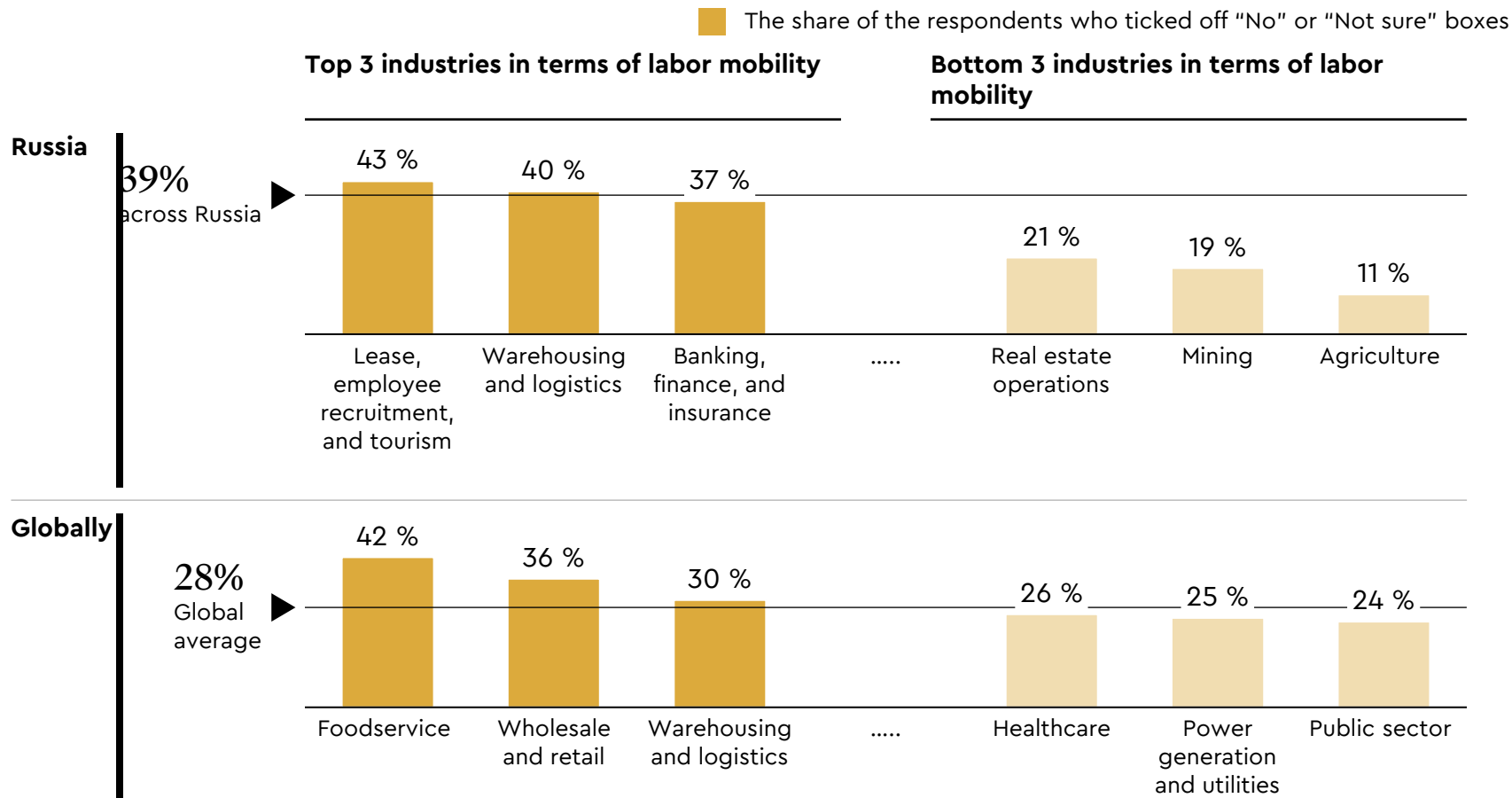
1. Low income – RUB 20,000 or less per family member; medium income – RUB 20,001–80,000; high income – RUB 80,001 or higher

Question: “Do you see yourself at your current place of employment one year down the line?”

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

# Labor mobility is the most marked in tourism and logistics, talent acquisition, and the banking sector, with up to 43% of the respondents ready to change jobs

“Do you see yourself at your current place of employment one year down the line?”  
Share of the respondents by industry, %



Unlike in Russia, in other countries<sup>1</sup>, the banking, insurance, and financial services sectors didn't make it to the top 3 industries with the highest employee churn rates

Although in most countries the public sector is characterized by the most stable employment and the lowest level of personnel mobility, the Russian public sector is ranked somewhere in the middle in terms of mobility

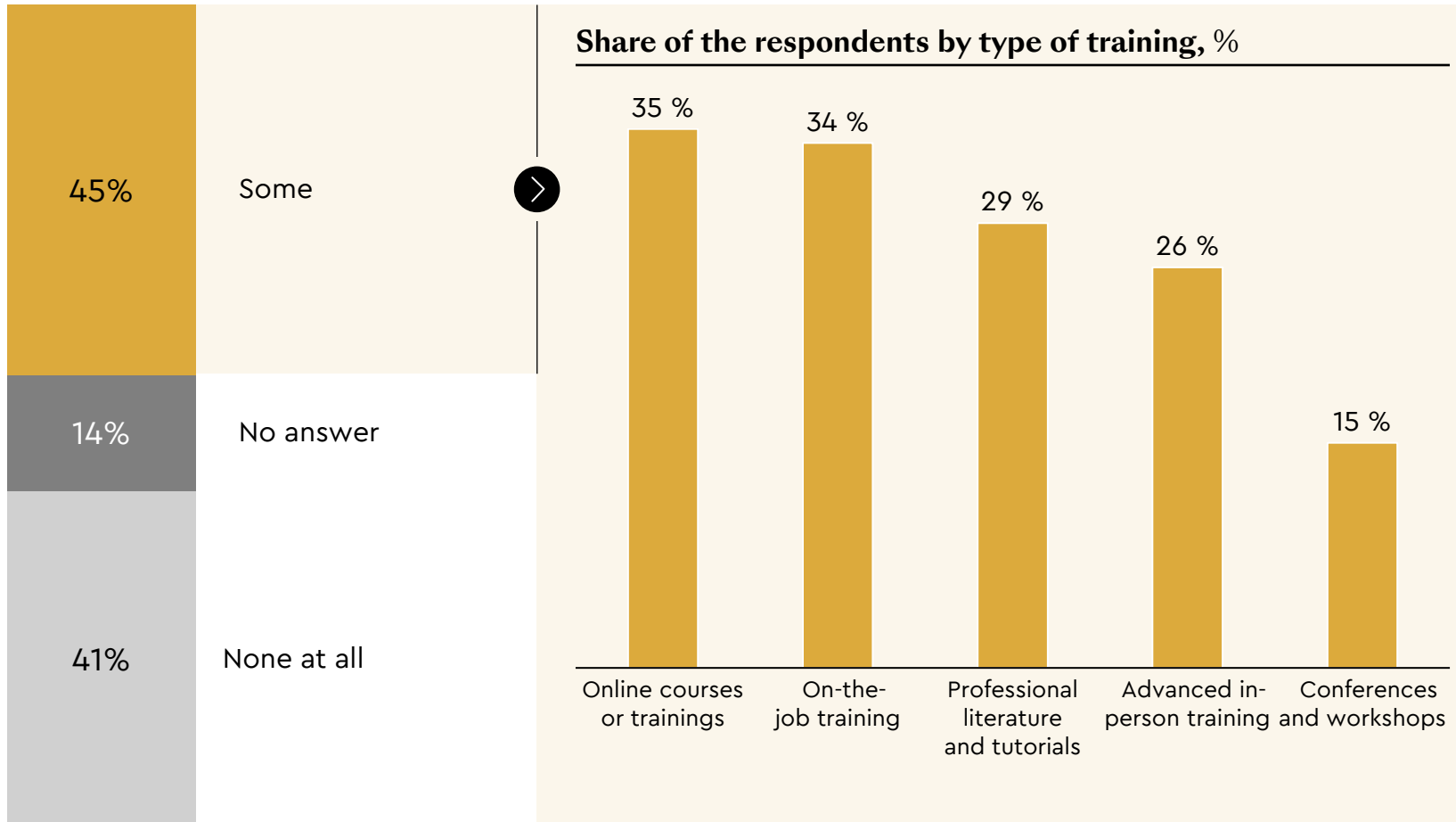
1. The sample included the USA, Canada, the UK, Germany, France, Germany, Japan, and India

Question: “Do you see yourself at your current place of employment one year down the line?”

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

# Most respondents invest no effort in upskilling

Did you make any efforts to develop and upgrade your professional competencies last year? Share of the respondents, %



Only **45%** of the respondents made a conscious effort to improve their professional competencies



Most Russian citizens prefer to upgrade their professional skills via online courses and trainings (**35%**) and on-the-job training (**34%**)

Question: "Did you make any efforts to improve your professional competences last year?"

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

# Members of the senior generation put the least effort into upskilling

Did you make any efforts to develop and upgrade your professional competencies last year? Share of the respondents, %

Types of training 	Generations <sup>1</sup> 			
	Z	Y	X	Senior generation
Online courses or trainings	<b>17%</b>	12%	12%	6%
On-the-job training	14%	<b>19%</b>	17%	6%
Professional literature and tutorials	12%	<b>15%</b>	11%	11%
Advanced in-person training	11%	14%	<b>15%</b>	7%
Conferences and workshops	<b>7%</b>	<b>7%</b>	5%	5%
No efforts or No answer	54%	52%	51%	<b>74%</b>

Unlike members of generations Y and X, who prefer to acquire new skills on the job, Zoomers took online courses and trainings **(17%)**

**74%** of senior respondents invested absolutely no effort in upgrading their professional skills

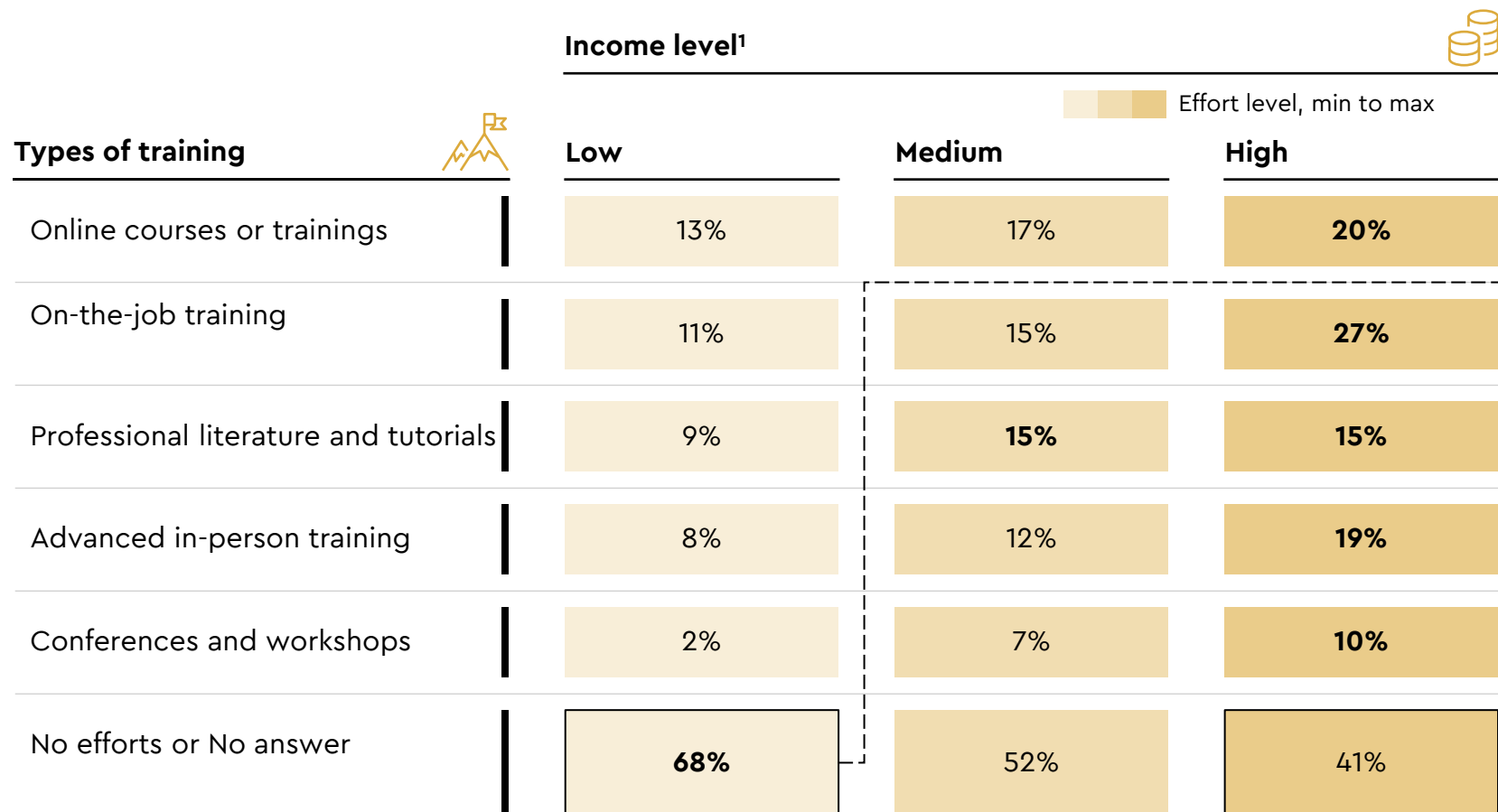
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Question: "Did you make any efforts to improve your professional competences last year?"

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

# High-income respondents is the only group of participants in which the majority invested time and effort into professional growth and development

Did you make any efforts to develop and upgrade your professional competencies last year? Share of the respondents, %



More than **2/3** of low-income respondents invested absolutely no effort into upgrading their skills last year

More than half of Russian citizens with a high income did some sort of training last year

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

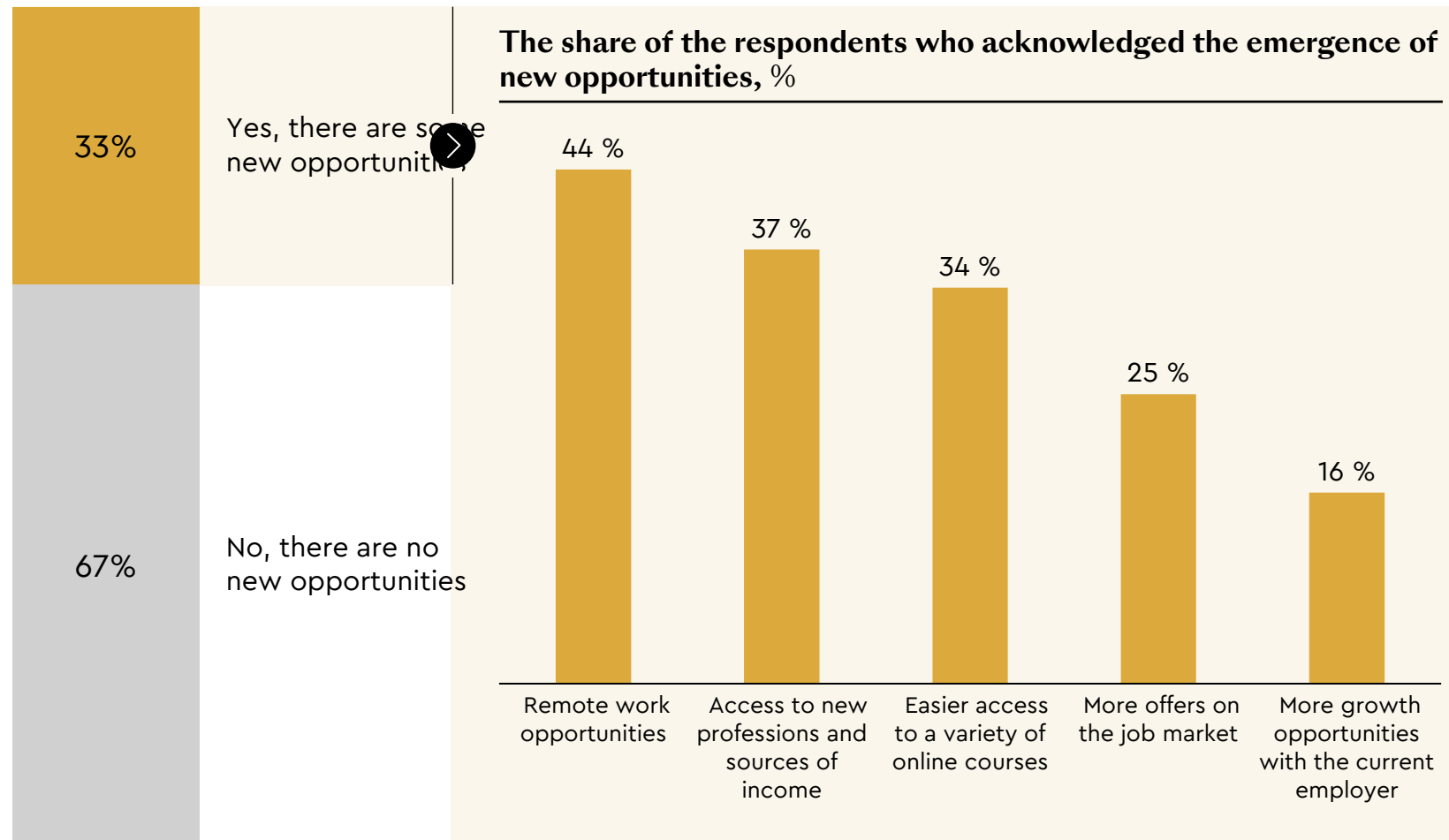
Question: "Did you make any efforts to improve your professional competencies last year?"

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



# Most Russian citizens observed no new opportunities for professional growth and development

What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)? Share of the respondents, %



Only 33% of the respondents acknowledged the emergence of new opportunities

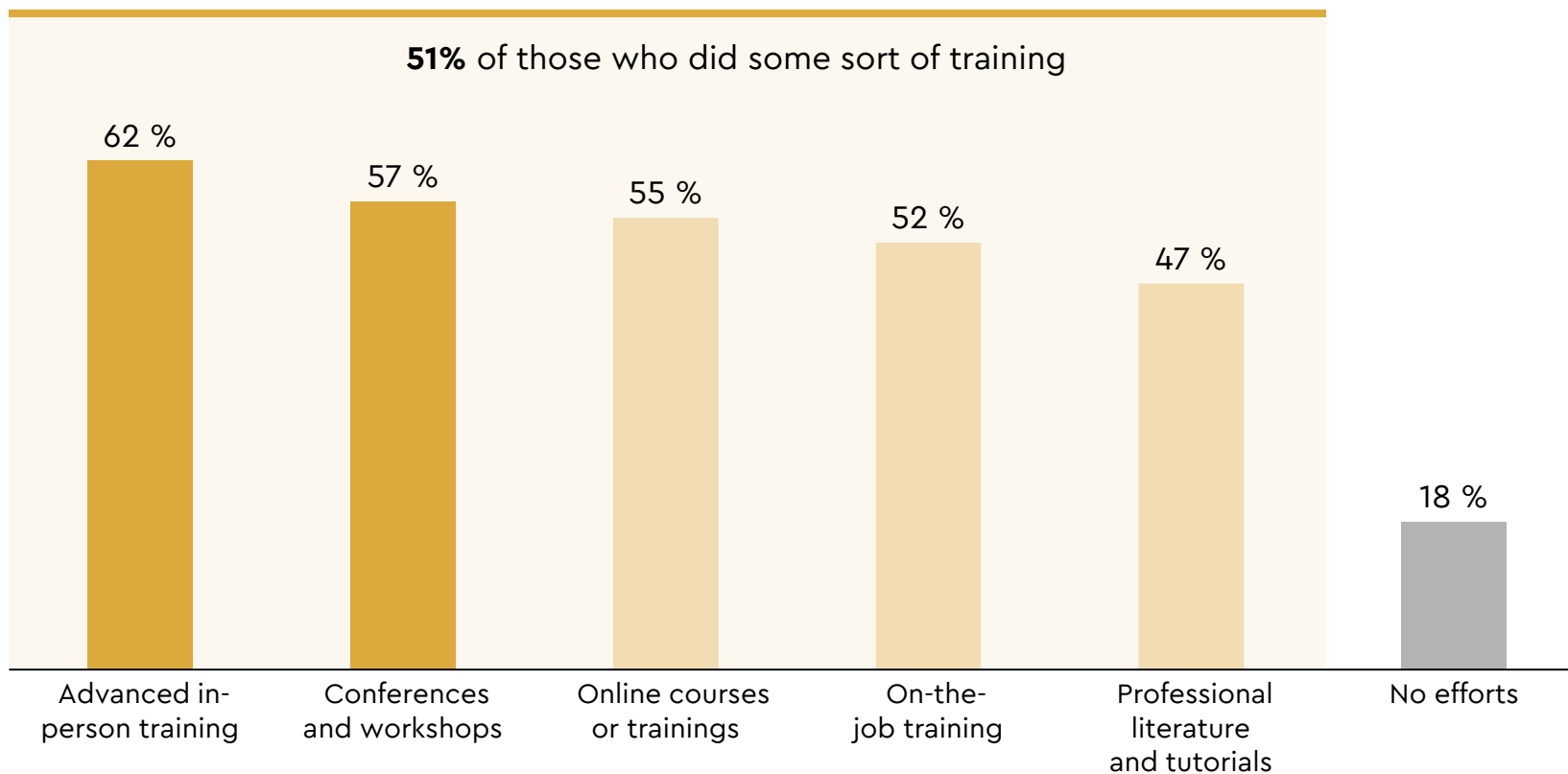
Most respondents mentioned the opportunities for remote work from anywhere (44%)

Question: What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)?

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

## However, the majority among those who took some pains to upgrade their skills and learn new ones, noticed the emergence of new opportunities on the labor market

The share of the respondents who acknowledged the emergence of new opportunities for professional growth and development since 2019 (breakdown by the type of training they took last year), %



Among the respondents who made some efforts to upskill, the share of those who observed new opportunities stands at **51%**, compared to only **18%** among those who invested no effort

The greatest numbers of new opportunities were observed by those respondents who underwent the most time- and effort-consuming types of training, e.g. attended full-time professional development courses (**62%**), as well as conferences and workshops (**57%**)

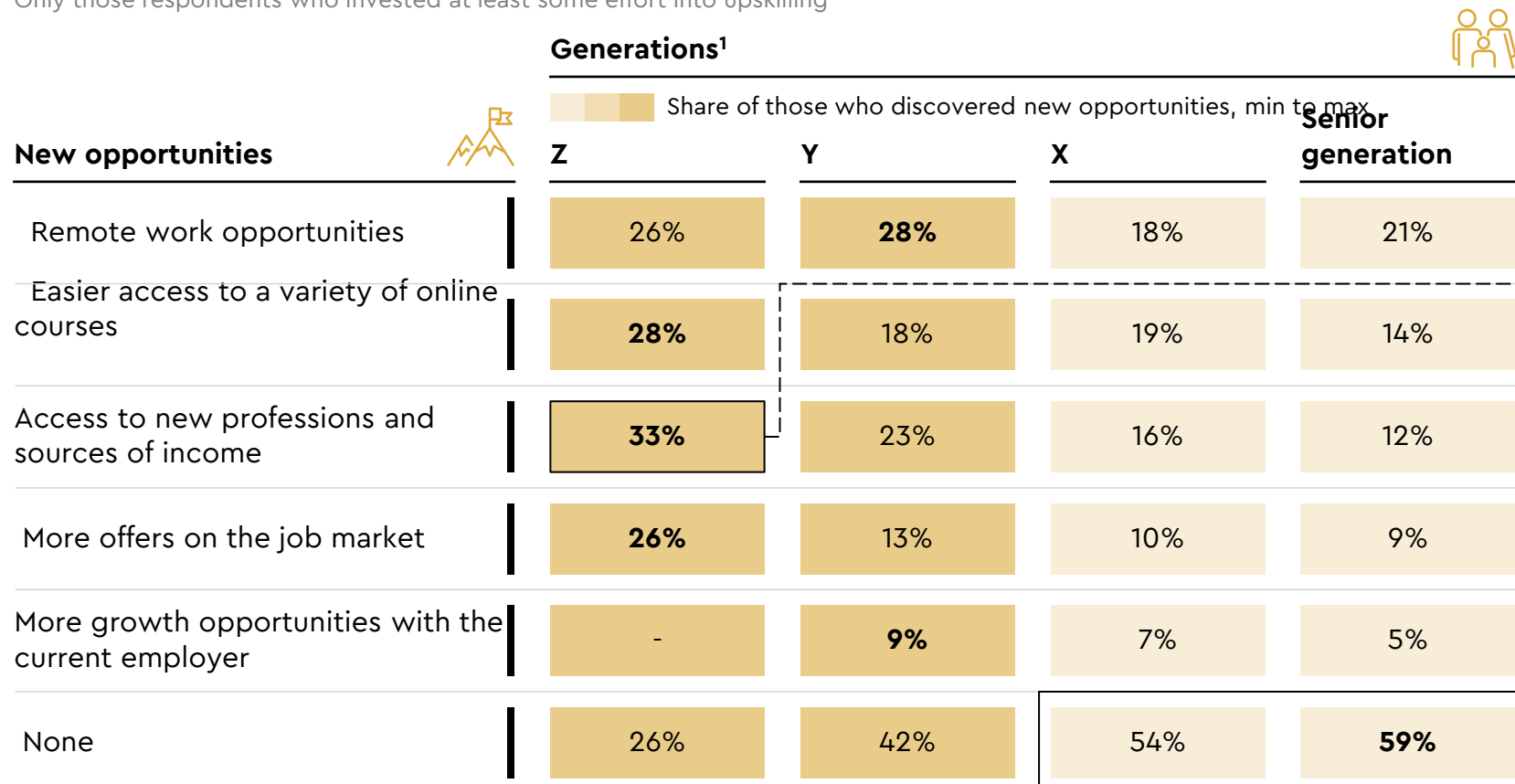
Question: What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)?  
Question: "Did you make any efforts to improve your professional competences last year?"

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

# Among those who took at least some training, members of the younger generations Y and Z report observing most new opportunities

What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)? Share of the respondents, %

Only those respondents who invested at least some effort into upskilling



Unlike other generations, Zoomers tend to observe the availability of new professions and sources of income (**33%**) rather than remote work opportunities (**26%**)

Unlike generations Y and Z, members of X generation and senior generation rarely observed any new opportunities even following their training

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: What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)?

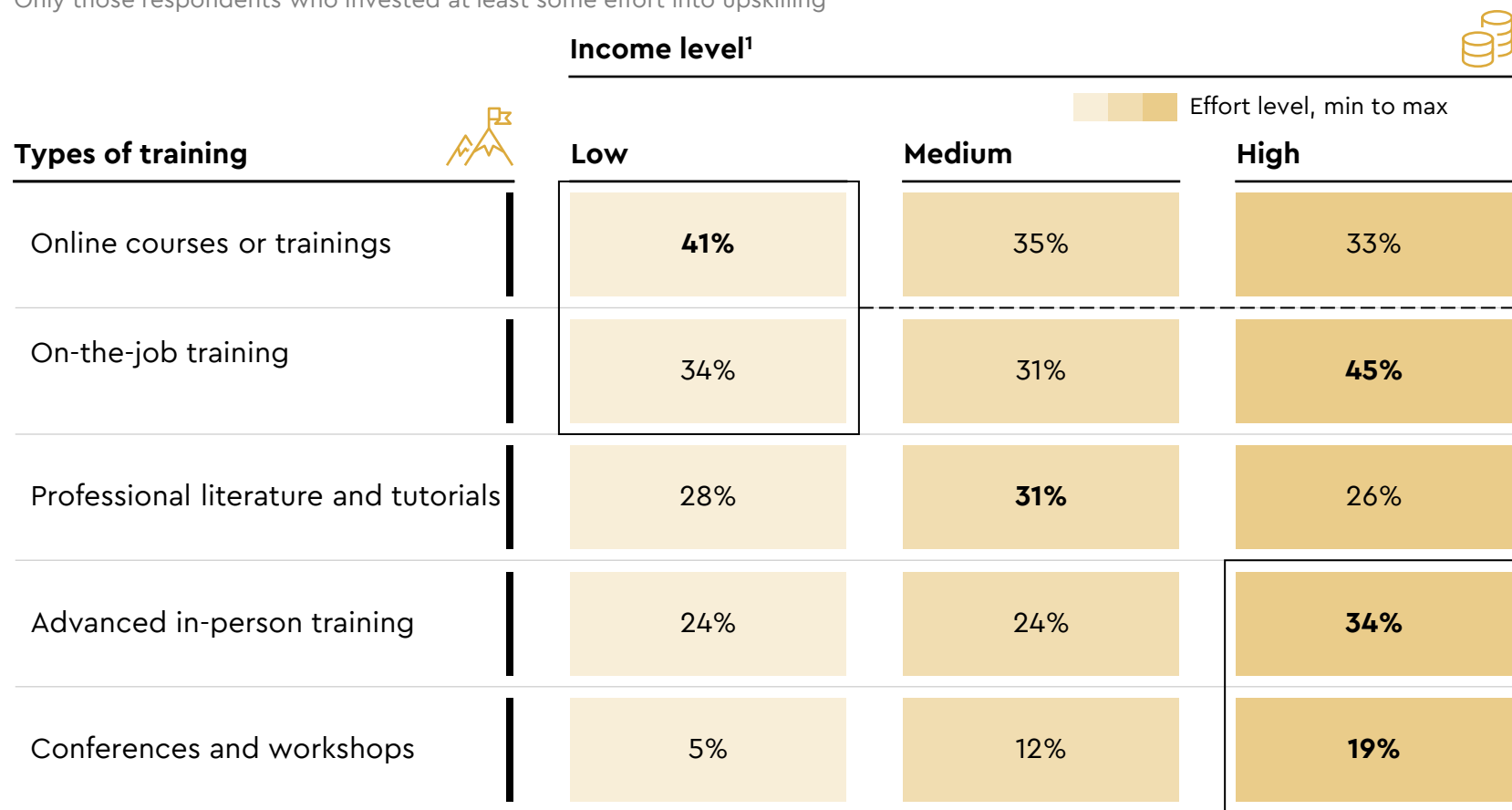
Question: "Did you make any efforts to improve your professional competences last year?"

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

# More often than others, high-income respondents undertook the most time- and effort-consuming types of training

Did you make any efforts to develop and upgrade your professional competencies last year? Share of the respondents, %

Only those respondents who invested at least some effort into upskilling



Most low-income respondents took online courses (**41%**) or on-the-job training (**34%**)

High-income respondents more often than others took advanced in-person training courses (**34%**) or attended conferences and workshops (**19%**)

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

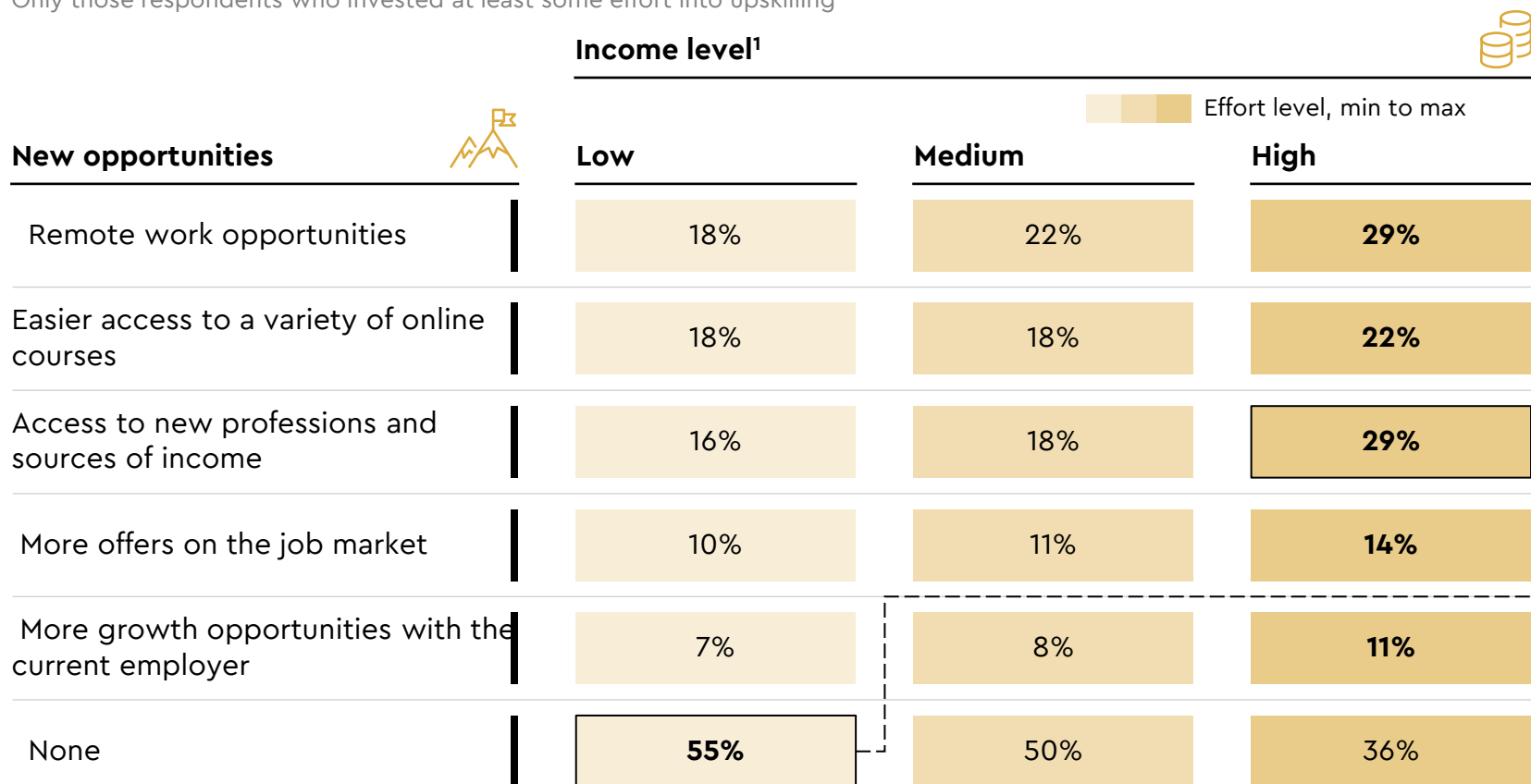
Question: "Did you make any efforts to improve your professional competencies last year?"

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

# High-income respondents reported observing the greatest number of new professional growth opportunities following their training

What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)? Share of the respondents, %

Only those respondents who invested at least some effort into upskilling



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: What new opportunities (if any) for professional growth and development have arisen since 2019 (before the COVID-19 pandemic)?

Question: "Did you make any efforts to improve your professional competences last year?"

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

Apart from the emergence of remote work opportunities (29%), high-income respondents also noticed the availability of new professions and ways of earning money (29%)

In contrast to medium- and high-income individuals, most low-income respondents did not observe any new opportunities even after completing their training

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