

MAY 2022

# READING THE TRUTH ABOUT BETWEEN RUSSIAN SENTIMENT THE DATA



kivvit

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# OVERVIEW & KEY THEMES

*As Russia has grown more isolated from the rest of the world due to social media shutdowns, communication cutoffs, and global companies withdrawing operations, we need to work harder to understand what the Russian people think and believe.*

At Kivvit, we uncovered public sentiment through our data-driven analysis of social media conversation, audience engagement with news coverage, and understanding spheres of influence. Given the lack of access to the Russian people and their inability to express themselves honestly via digital channels, we navigated these issues based on various sources of the most credible data available to draw conclusions. **We've identified 5 key themes.**

## 01 PUTIN'S PROPAGANDA IS WORKING

- ➔ **Rising pro-Putin sentiments are consistent with growing anti-US views (72%), as well as the share of Russians believing the country is on the right track (69%).<sup>1</sup>**
- ➔ **81% of Russians say they personally support the actions of the Armed Forces of Russia in Ukraine.<sup>1</sup>**

**Russian journalists and Russia experts elevate the government's attempt to cast Western corporations' penalization of the Russian population as "Russophobic" propaganda, used to support claims of the war being a proxy fight with the West.**

WILL VERNON • BBC MOSCOW BUREAU SR. PRODUCER

- ➔ **A recent state-owned poll,<sup>2</sup> consistent with findings from an independent poll weeks earlier,<sup>2</sup> signals widespread approval for Putin among Russians (79.9% in the state-owned, 83% in the independent). This is higher than support for the broader government, and consistent with Army support.**

## 02 RUSSIAN COMFORT WITH DISCOMFORT

- ➔ **Despite 67% believing Western sanctions affect the broad population, 69% say they haven't created serious personal problems. 53% are unbothered by sanctions, while 46% are bothered. The highest incidence of 'bother' occurs among those in Moscow and anti-Putin individuals.<sup>1</sup>**
- ➔ **When asked how Russians think their financial situation will change in the next 12 months, 70% said "it will worsen up," jumping from a staggering 14% in October 2021.<sup>1</sup>**

**In focus groups, Russians will complain that their lives are getting harder, while at the same time praising Putin for standing up to the US.**

DAVE LAWLEY • AXIOS WORLD EDITOR

<sup>1</sup>Levada: levada.ru/en (April 2022) // <sup>2</sup>VCIOM (April 2022) // <sup>3</sup>Kivvit Analysis (April 28, 2022) // <sup>4</sup>Bloomberg (April 2022)

### 03 SEARCH BEHAVIOR SHOWS RUSSIANS' MOST PROACTIVE INTEREST

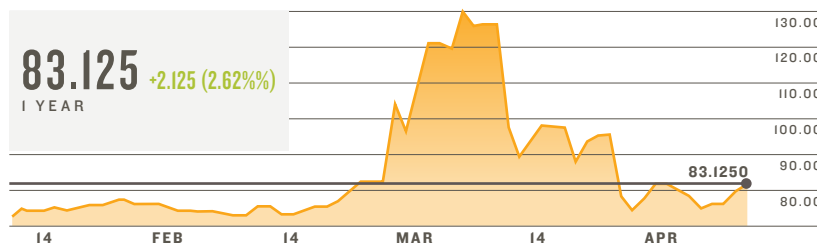
- Searches across the board are down significantly, with already-declining searches about **Putin down 19%**. The same is true of searches for economic indicators as the economy steadies.<sup>3</sup>
- Most notable is the growing number of searches about **Putin's health**. His gripping of the table during a recent meeting sparked concerns about Parkinson's. These concerns rank high among newly trending searches in Russia the last seven days.
- Updates about the war, including Putin agreeing to a ceasefire at a steel plant, and Putin's meeting with the UN Secretary General make up a significant number of the other "breakthrough searches."<sup>3</sup>
- Other notable searches include the **death of a Ukrainian social media influencer** and **Russia cutting gas supply to Poland**.<sup>3</sup>



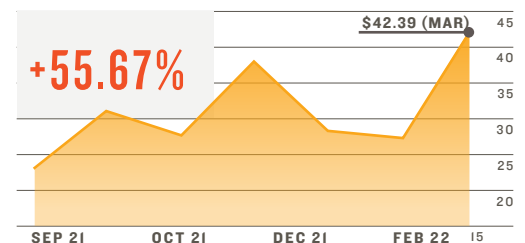
### 04 BRAIN DRAIN & A LOOMING RECESSION SIGNAL DARKER DAYS TO COME

- The International Institute of Finance estimates the economy will suffer for years to come from a "brain drain."

US DOLLAR / RUSSIAN RUBLE FX SPOT RATE  
RUB=:EXCHANGE



RUSSIAN GAS PRICES  
US DOLLARS / MILLION METRIC BRITISH THERMAL UNIT



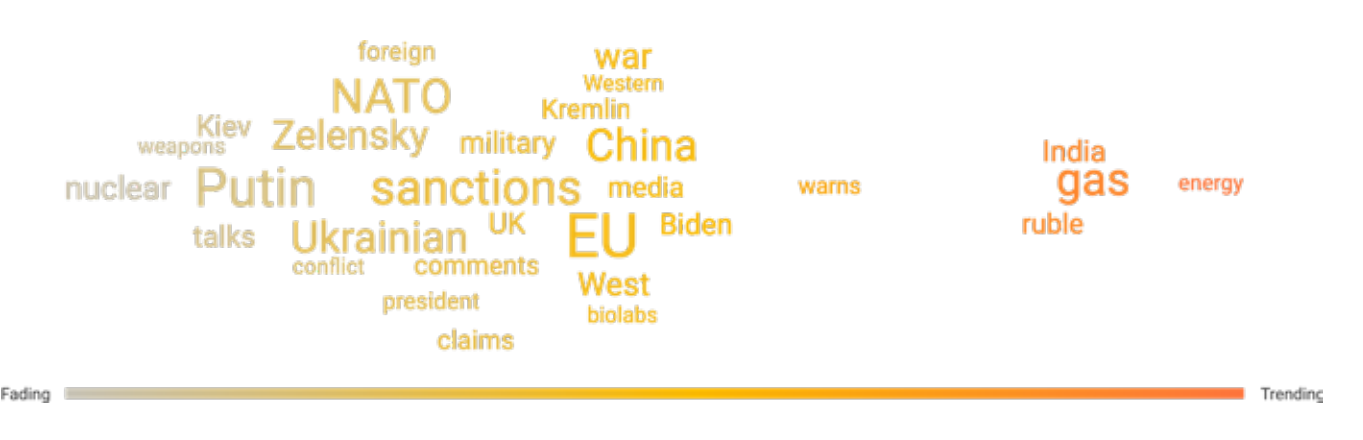
- A "brain drain" is the exodus of educated, middle class Russians with the financial means to leave the country. This is exacerbated by the fact that the US and EU have placed export controls on technology, including microelectronics, which will hinder technological development in Russia for years.<sup>4</sup>

“Many of the new emigres are tech industry professionals who can work remotely...**The only way we can protest is to leave the country, take our skills and money with us.** Almost everyone in our circle has made a similar decision.”

BBC • REPORTING

05 PUTIN’S ART OF DISTRACTION

Kivvit analyzed 996 high engagement headlines from Russia Today since the February 24th invasion to understand trending themes in the Russian government’s propaganda and key points in communication.



- ➔ Coverage shows increased mentions of engagement with India, framing the nation as a partner to Russia rather than the West (similar to commentary on China).
- ➔ Gas and energy continue as popular themes, positioning Russia’s energy capacity as a weakness for Western Europe and indicating Europeans remain reliant on Russians.
- ➔ Messaging about the value of the Ruble has increased, amplifying the currency’s recent rebound in financial markets.

DATE	HEADLINE (LINK)	SPREAD VELOCITY (0-1)*
03.31.2022	Russia offers SWIFT alternative for dollarless trade with India — report	0.96
04.07.2022	Ruble stronger than before Ukraine crisis	0.95
03.30.2022	All Russian exports could soon be in rubles	0.93
03.30.2022	Russian gas flow through the Yamal-Europe pipeline falls to zero — report	0.92
04.11.2022	EU fails to agree Russian energy ban	0.91
04.02.2022	UK won’t get Russian gas — Moscow	0.90
03.30.2022	US sends Russia sanctions czar to India	0.90
04.04.2022	Baltic state may agree to pay for Russian gas in rubles	0.89
03.29.2022	Russia will not give away gas for free — Kremlin	0.89
03.30.2022	Transition to ruble for gas payments will be gradual — Kremlin	0.89

\*Spread Velocity: Represented as a percentile among the entire set of articles, velocity is a proprietary metric that calculates an article rate of spread on major social media outlets.

*Kivvit assessed the latest content from Western Russia experts, mining for opinions from local Russian sources and collecting contextualized analysis of recent events on Russian public opinion.*

- **Experts remain skeptical** of the impact Western sanctions will have on the war.
- Experts suggest the **adverse impacts sanctions are having on Russian life**, combined with relentless propaganda from Russian leadership that aims to cast doubt on any version of events other than their own, may be hardening anti-West opinions among the general population, blaming the West for their hardship.

**AXIOS**

April 2022 • Dave Lawlwer, author of Axios World

### Inside Wartime Russia, Putin Isn't Losing

**On the ground:** Russian shoppers can no longer buy many Western products or use certain payment methods, and many goods they can buy are now more expensive thanks to the sanctions. But they don't blame Putin, says Yana, a journalist in Moscow who asked that we not use her last name.

- "Oh, what is this West doing to us?" she recalls a cashier saying when she visited a town outside the city. "The sanctions just reassured people that the West is evil."
- "For the majority, it's not about Ukraine. It's about Russia and the West fighting inside Ukraine," Volkov says. In focus groups, Russians will complain that their lives are getting harder, while at the same time praising Putin for standing up to the U.S., he says.

**PUCK**

April 2022 • Julia Ioffe

### Life and Death and in Between in Kyiv

**"To what extent do you make a distinction between the Russian people and the Russian government?** I would probably be the last person to tell people not to conflate the politicians and the people, but now it truly is impossible [to separate the two]. We see the level of support for Putin. We can see who brought him to power, who made him the way he is. So yes, I think the Russian people bear a responsibility for this murderer.

**Do you think Russians want to believe it, maybe so they can sleep better at night?** The classic tactic of Russian propaganda isn't to advance their version of events, but to undermine people's trust in any version, to advance the idea that the truth is unknowable, that everything is so complicated and everyone around you is lying so much that the truth will never come out anyway. This way, they're not advancing their own version but are instead destroying the truth."



**ian bremer** ✓ @ianbremmer · Apr 6

there is no credible level of us/eu/g7 economic sanction that will make putin end the war in ukraine

the rest of the world will mostly maintain existing ties

russia's decoupling from the west will be permanent



83



117



714





# CONCLUSION

*In Russian there are **two words for truth**, “pravda,” which means truth that appears on the surface and “istina,” meaning certain, unshakeable truth.*

Given the indicators we have found, it is fair to say that Putin’s messaging appears to be ringing true, or pravda, for a majority of Russians. We also know the deeper, istina: there is much more to learn, for the world and for the Russian people navigating their growing information desert.

**METHODOLOGY:** Kivvit analyzed the most credible available public data of Russian sentiment, including polling, news coverage, and expert commentary to draw conclusions and identify trends. Kivvit also analyzed Google Searches from users based in Russia around six topics: Putin, Ruble, Emigration, Employment, Inflation, and Sanctions. Each category includes various queries (including Russian language) determined by Google’s taxonomy.





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