



NOBLETMEDIA CIS



Survey on lifestyle and financial views of middle and upper-middle class

in Ukraine, Azerbaijan, Belarus, Georgia, Moldova and Uzbekistan

Prepared for Noblet Media CIS by Info Sapiens research agency



About **NOBLETMEDIA CIS**

Noblet Media CIS is a Public Relations, Communications and Marketing Company founded in 2004. Today the company operates in eight countries – Ukraine, Georgia, Armenia, Moldova, Azerbaijan, Belarus, Kazakhstan and Uzbekistan – with headquarters in Kyiv and Tbilisi. Noblet Media is Edelman affiliate, the world's biggest independent communications and marketing company. Noblet Media provides a full range of professional PR and marketing services using expertise from both within and outside the European Union's Eastern Partnership countries.

About



Info Sapiens research agency specializes in public opinion surveys (social, political and marketing), behavioral measurements and in analyzing data from secondary sources. Info Sapiens was established in September 2018 due to the global closure of custom research business by GfK company. Almost all Info Sapiens employees are former GfK Ukraine employees. Within 2019-2020 Info Sapiens conducted more than 500 research projects for more than 200 clients. According to the Ukrainian Marketing Association as of 2019, we are the largest Ukrainian research company, following the 5 representatives of the international companies. Info Sapiens complies with all research standards of ICC/ESOMAR and is listed in ESOMAR Directory.

SURVEY METHODOLOGY



Goal: to study social, financial and economic views, consumer behavior and media usage of middle and upper-middle class



Geography: Ukraine, Azerbaijan, Belarus, Georgia, Moldova, Uzbekistan



Sample: 200 interviews in each country



Target audience: urban citizens, 18-45 y.o., members of households with income higher than average



Duration of interview: 15 minutes



Method: online interviews in Ukraine, CAPI (computer assisted face-to-face interviews) in Ukraine, Azerbaijan, Belarus, Georgia, Moldova, Uzbekistan



Fieldwork: April 8-30, 2020 (anti-virus measures were taken during personal interviews)

SURVEY AUDIENCE



The share of middle and upper-middle class* among urban population aged 18-45 in each country



*We did not apply any approach of class analysis as it was not the survey objective

**Sum of answers:

We have enough money for food, clothes, footwear and other purchases. but we need to save or borrow money for purchasing expensive things.

We have enough money for food, clothes, shoes, and expensive purchases, but we need to save or borrow money for purchases like a car or an apartment.

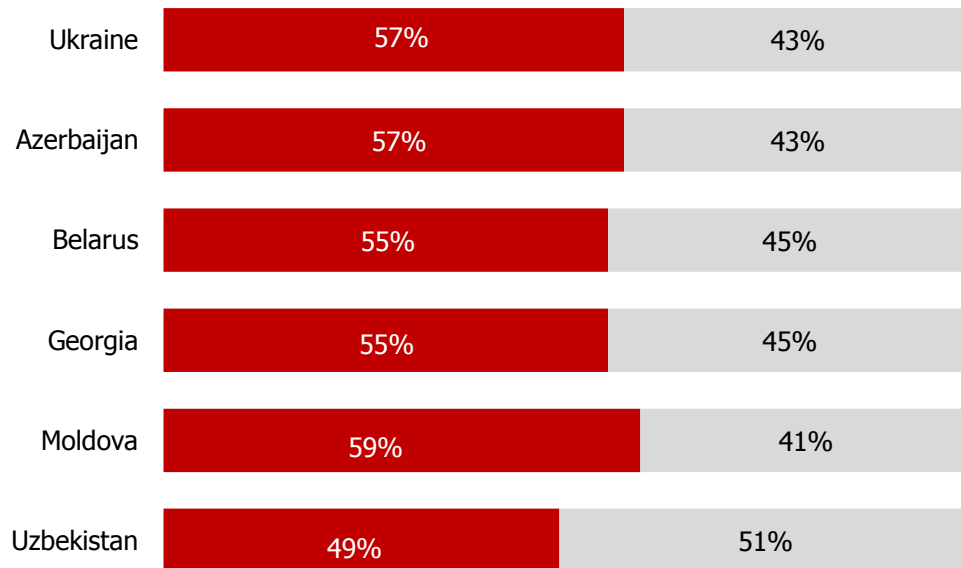
I can buy anything at any time.

***Sum of answers:

We have to save on food

We have enough money for food, but have to borrow or save for clothes, footwear

We have enough money for food and necessary clothes and footwear, but must borrow or save for such purchases as vacuum cleaner



■ Middle and upper-middle class **

■ Low income ***

SURVEY AUDIENCE



Middle and upper-middle class* is made up of...

- The most active consumers who make important decisions about large purchases / investments;
- Usually well educated and well-informed people who hold key / managerial positions in companies / organizations;
- Opinion leaders for another part of population as the most active, well-informed and respectable stratum of society

Middle and upper-middle class set the tone for economic life of country





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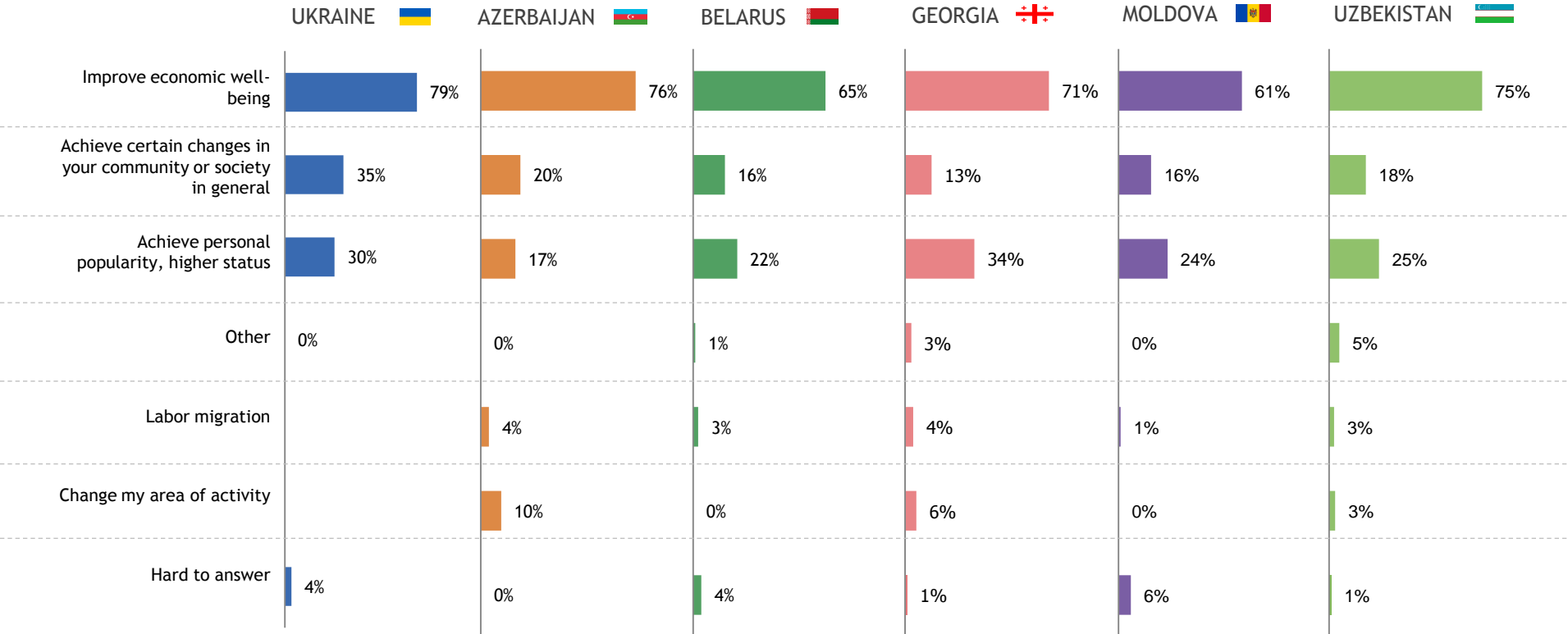


Personal Goals



Citizens of all countries are mostly focused on improving economic well-being, Ukrainians tend to think about changes in their community or society and Georgians - about achieving higher status more often

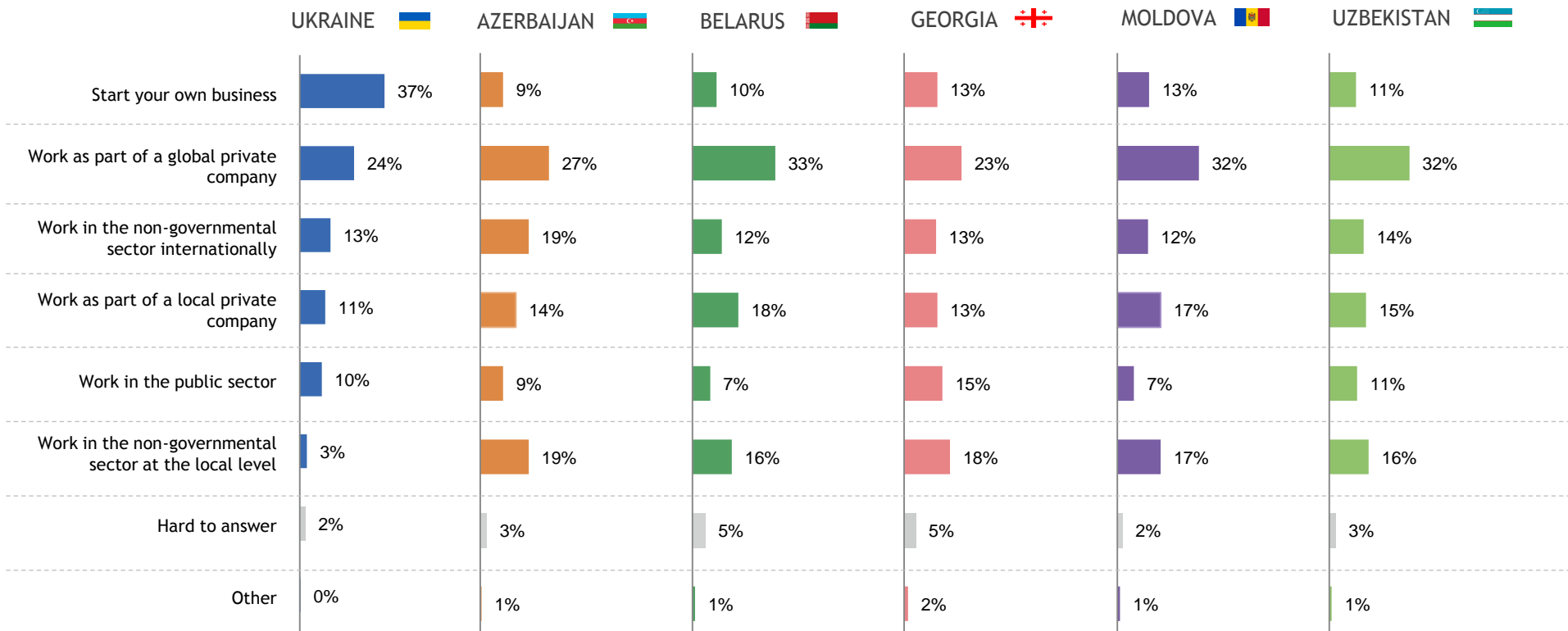
YOUR PRIORITY OBJECTIVES IN YOUR AREA OF ACTIVITY FOR THE NEXT 10 YEARS:





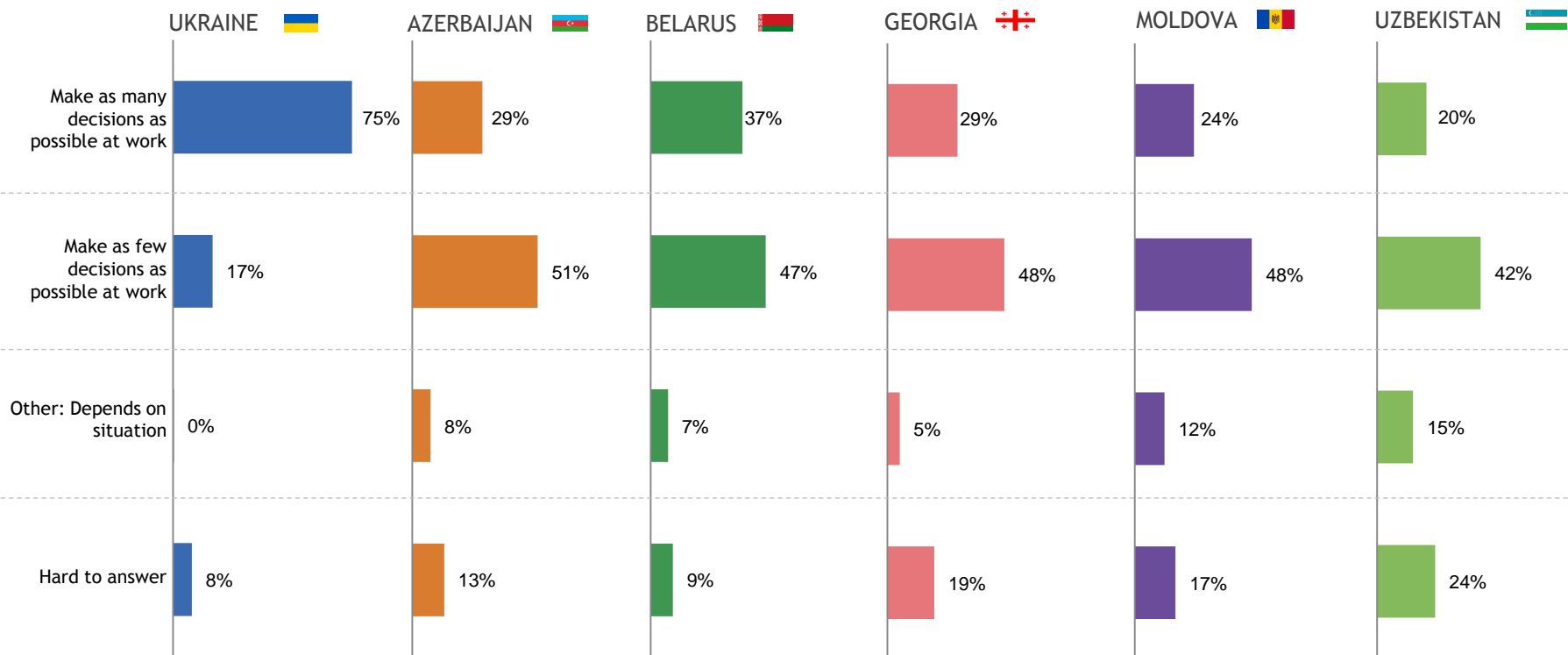
Starting own business is the dream job for relative majority of Ukrainians while citizens of other countries mostly perceive working in a global company as the dream job

WHAT IS YOUR DREAM JOB?



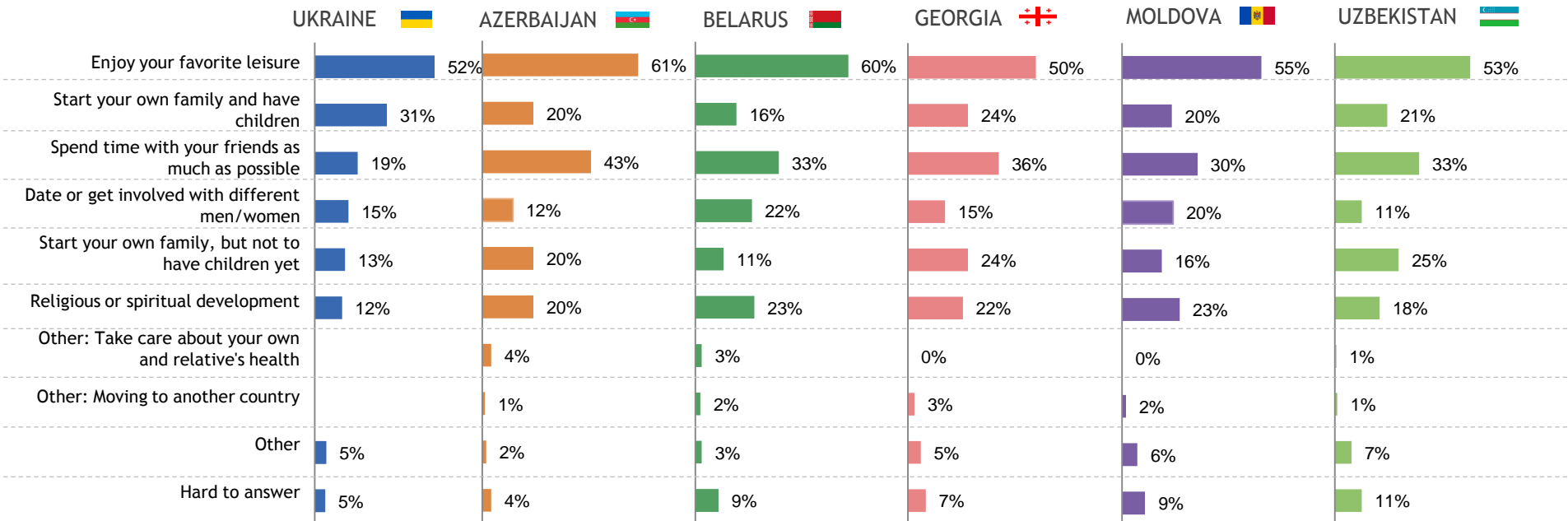


WHAT DO YOU SEE YOUR ROLE AT WORK?





YOUR VIEW OF YOUR PERSONAL LIFE IN THE NEXT 10 YEARS: CHOOSE NO MORE THAN 2 ANSWERS.

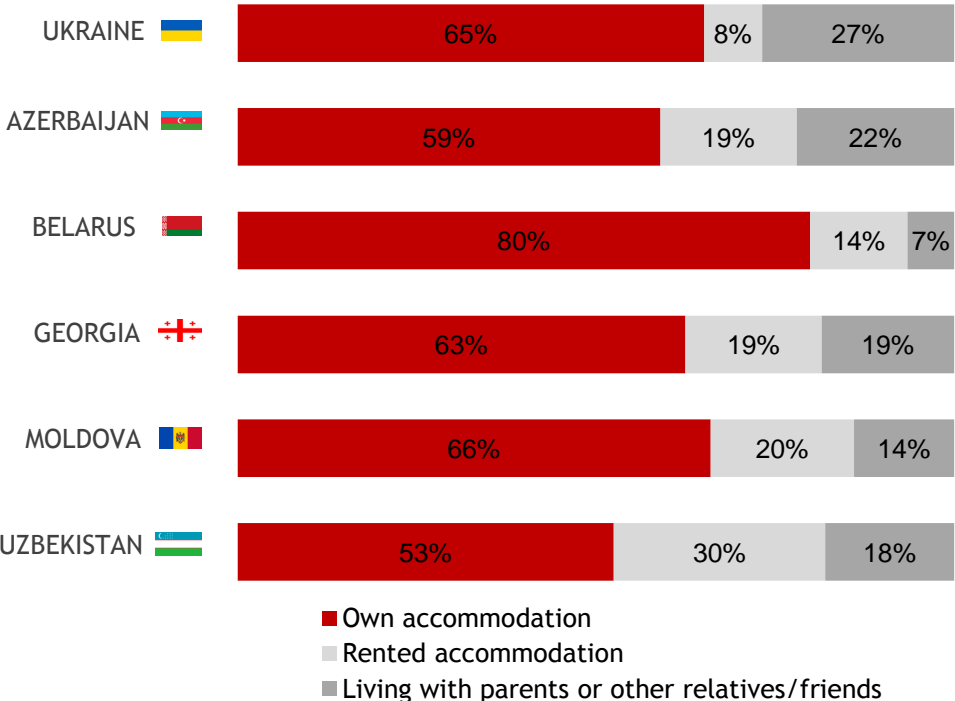


A photograph of a family in a kitchen. A man in a grey t-shirt and a woman in a black top and patterned skirt are standing at a counter. The kitchen has wooden cabinets and a white refrigerator. A table in the foreground is set with a meal. The text 'Family Welfare and Expenses' is overlaid in white on a semi-transparent dark grey background.

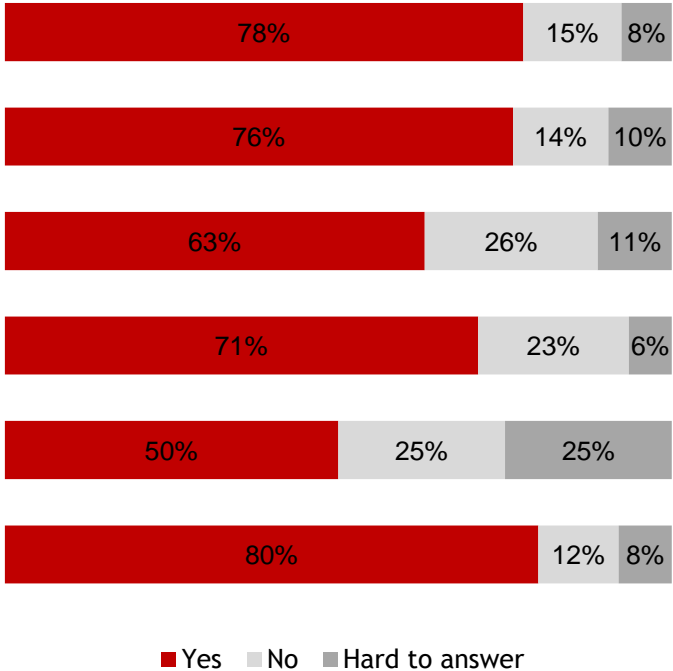
Family Welfare and Expenses

Ukrainians live with parents or other people most often. Moldovans who live with parents or other people least often would like to live separately

WHERE DO YOU LIVE?



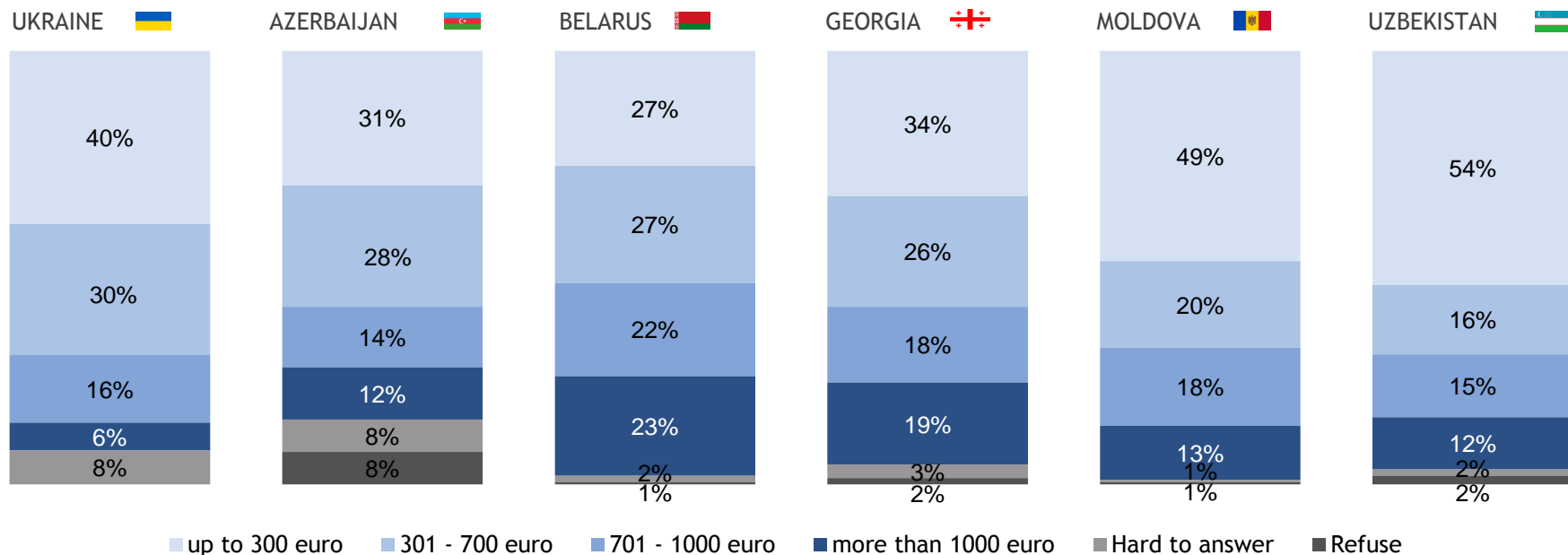
DO YOU PLAN TO LIVE SEPARATELY?
(among those, who live with parents or other people)





More Belarusians have personal income more than EUR 1000 possibly because of the highest share of persons aged 36-45 while Moldovans and Uzbeks most often have income less than EUR 300 possibly because of the youngest respondents (see slide 35)

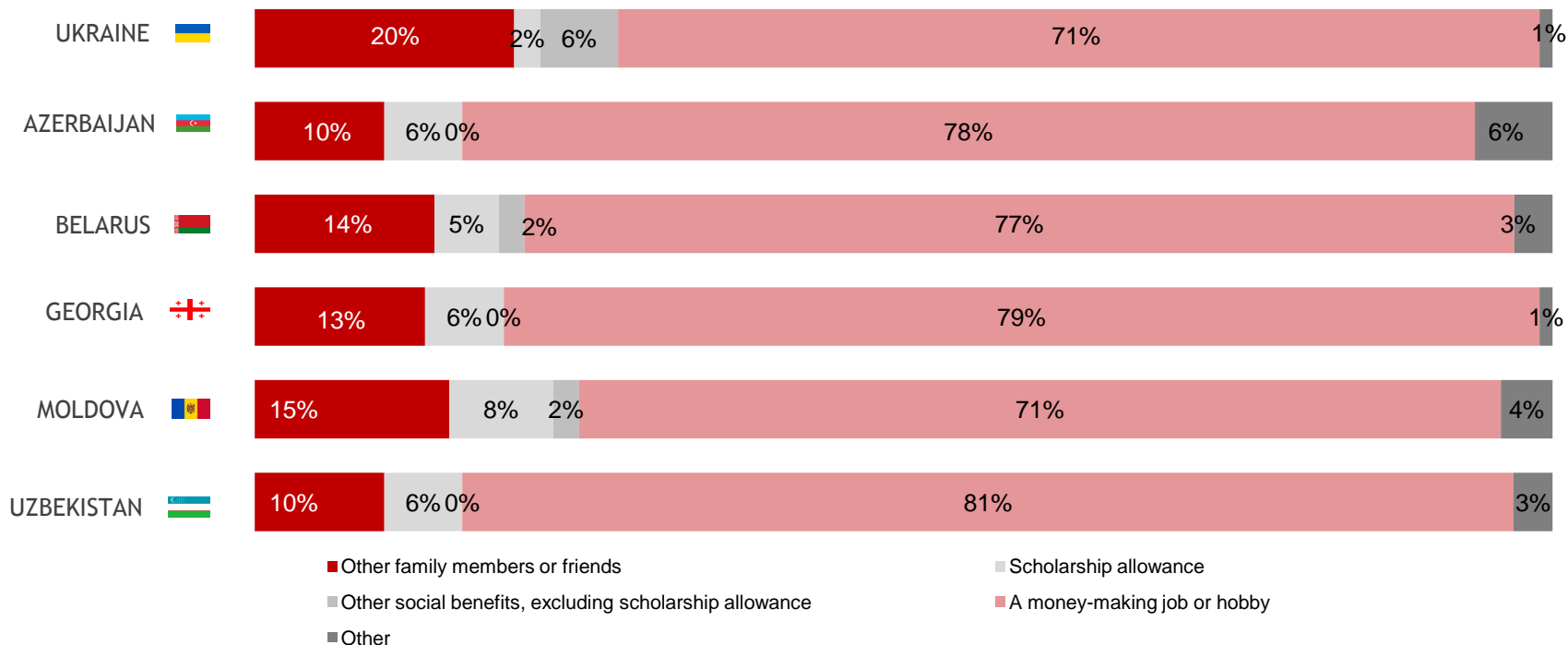
SPECIFY THE AMOUNT OF PERSONAL INCOME PER MONTH (THE AMOUNT OF MONEY YOU RECEIVE REGARDLESS OF THE SOURCE):





Ukrainians have the largest share of personal budget which comes from family or friends

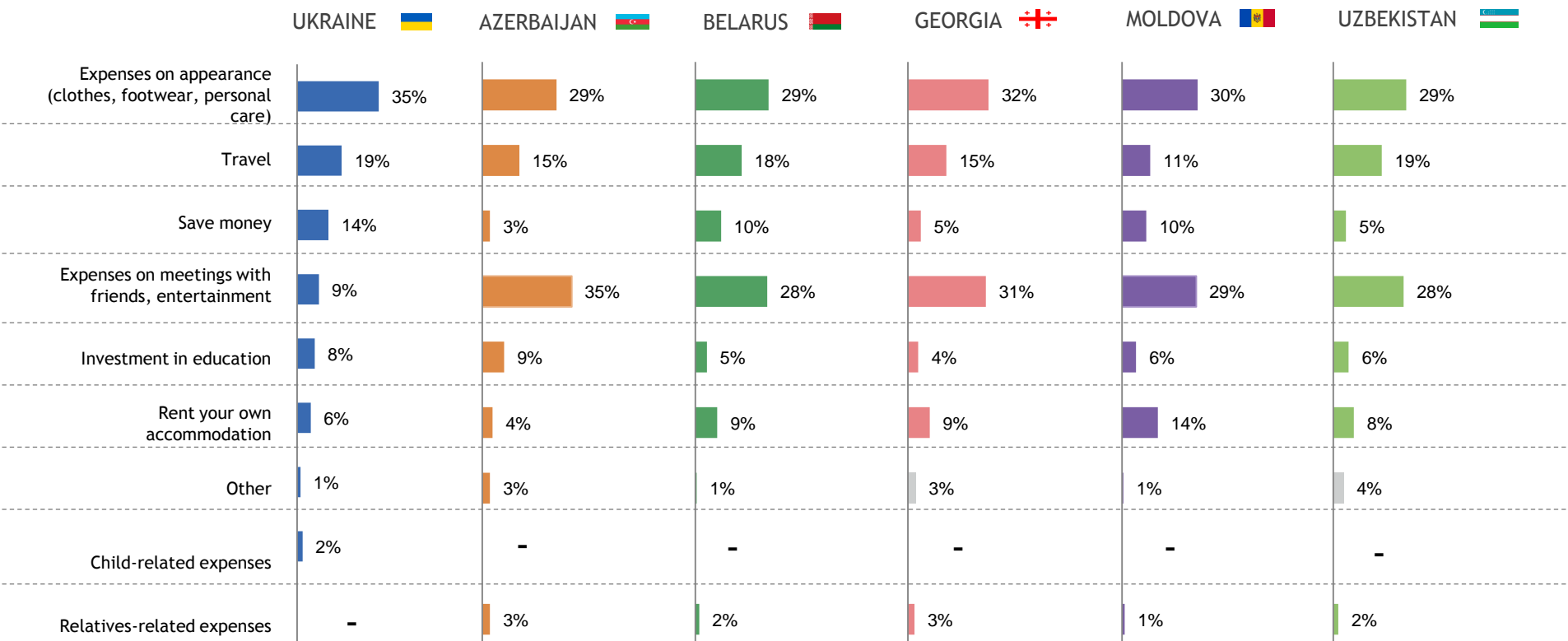
SPECIFY YOUR SOURCES OF BUDGET (mean score for each source)





Ukrainians least often spend personal budget on meetings with friends and entertainment while for a relative majority of the citizens of other countries it is a primary item of expenses

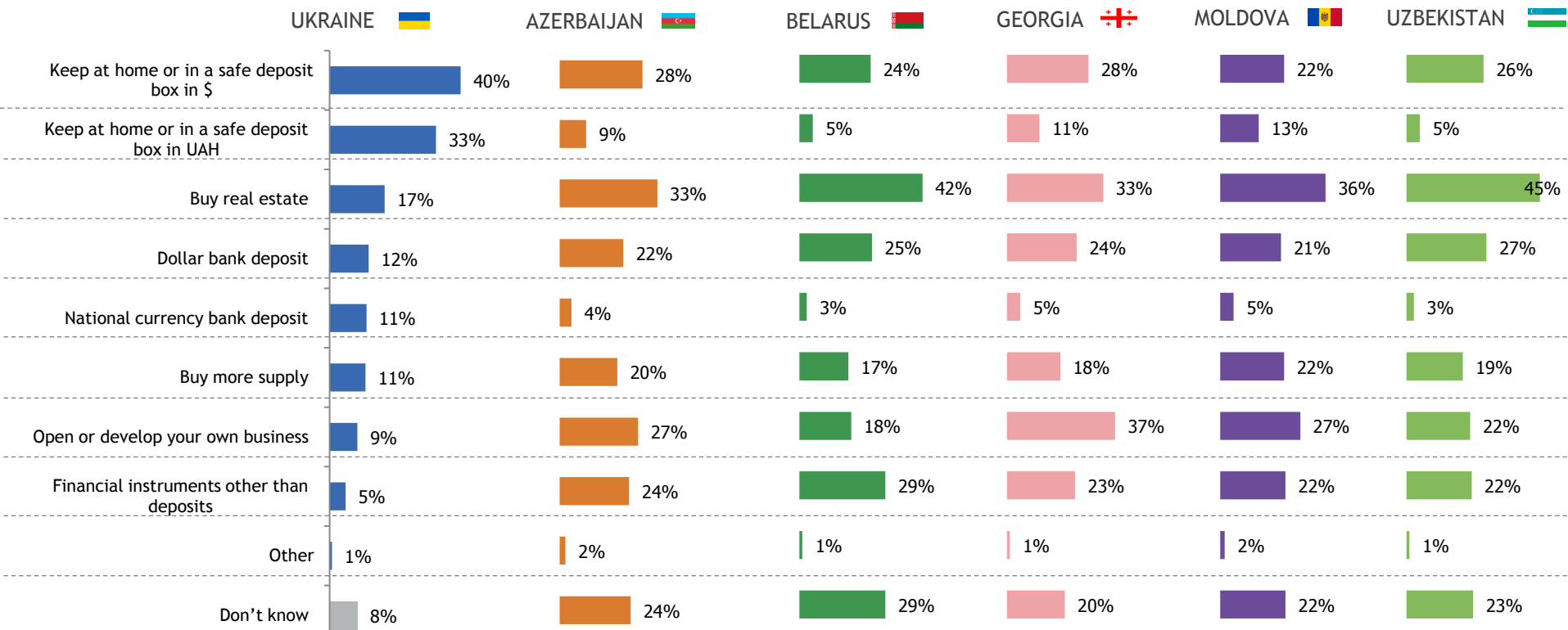
WHAT IS YOUR PRIORITY ITEM OF EXPENDITURE, NOT INCLUDING FOOD AND UTILITY COSTS





Real estate is the best way to manage savings in all countries except for Ukraine where relative majority prefers to keep cash in dollars or national currency

IN YOUR OPINION, WHAT ARE THE BEST WAYS TO MANAGE SAVINGS NOW?

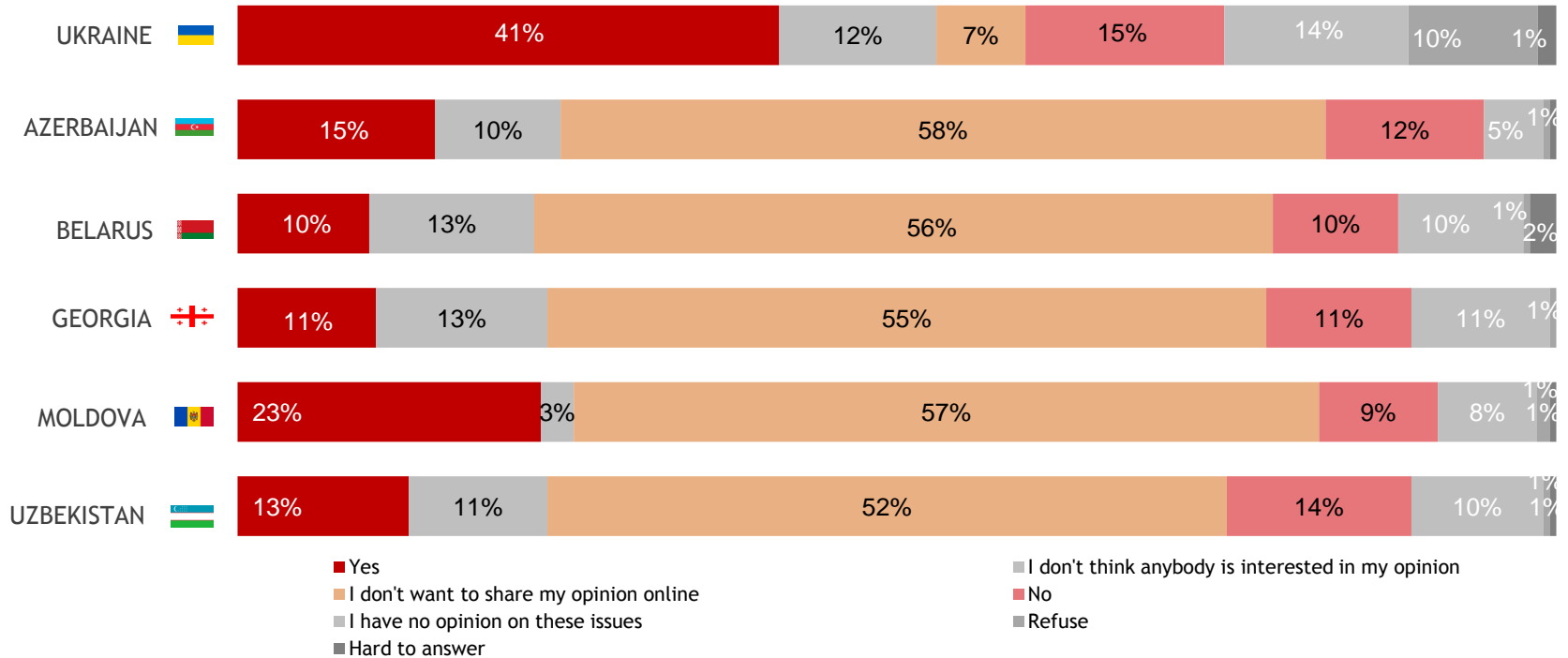


A silhouette of a person stands on a mountain peak, arms outstretched in a 'V' shape, pointing upwards. The person is set against a dramatic sky filled with thick, white clouds. The lighting is warm, suggesting a sunrise or sunset, with a golden glow on the right side of the frame. The overall mood is one of triumph and freedom.

Freedom of Speech

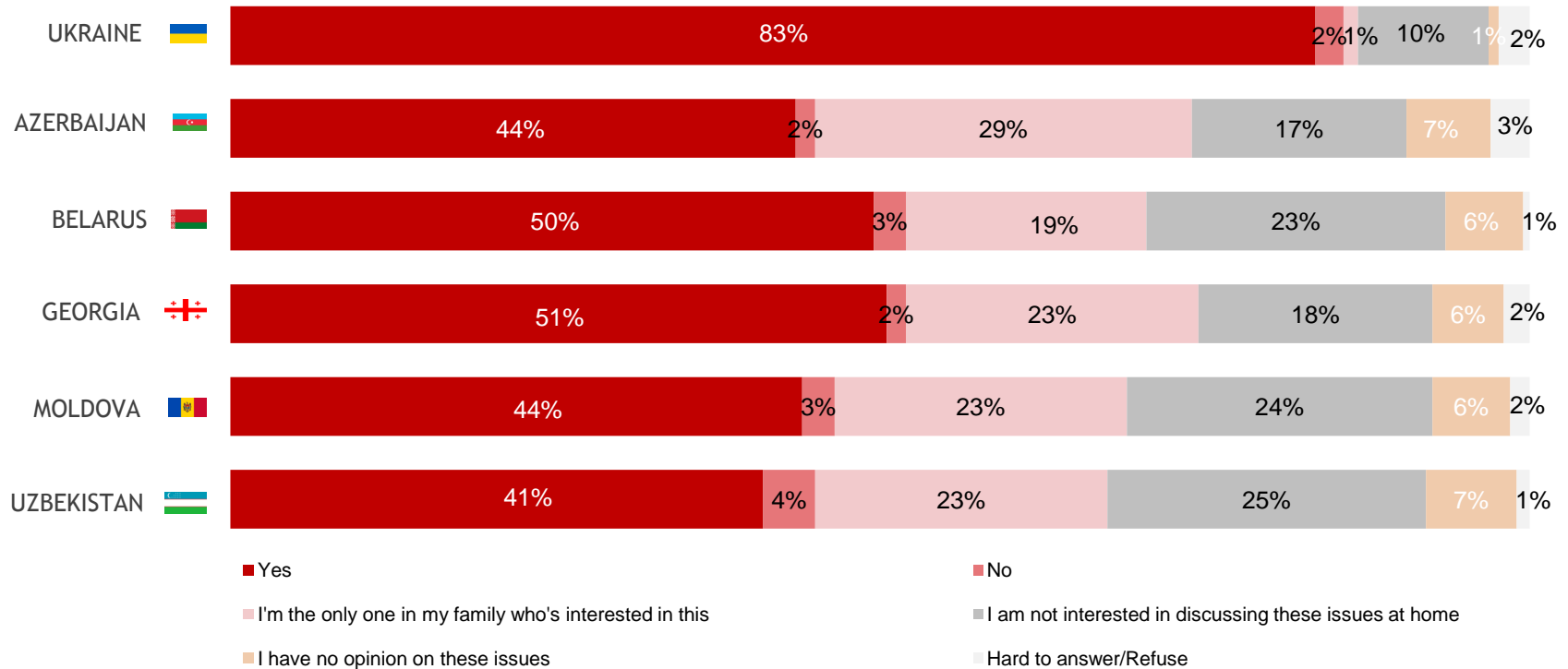


CAN YOU PUBLISH YOUR OPINION ON THE ECONOMIC AND SOCIAL ISSUE ONLINE FREELY?



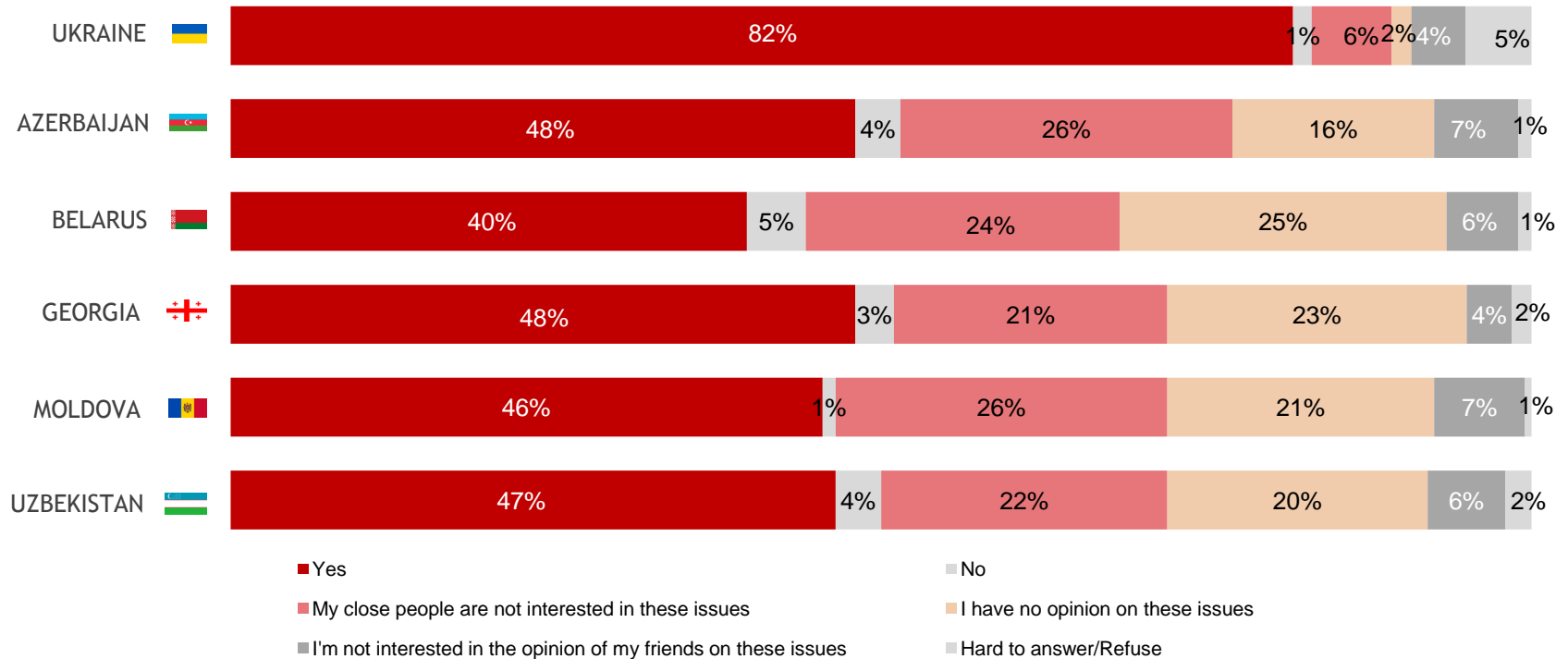


DO YOU HAVE A VOICE IN YOUR FAMILY WHEN DISCUSSING SOCIAL AND ECONOMIC, AND POLITICAL ISSUES RELATING TO THE FUTURE OF THE COUNTRY?



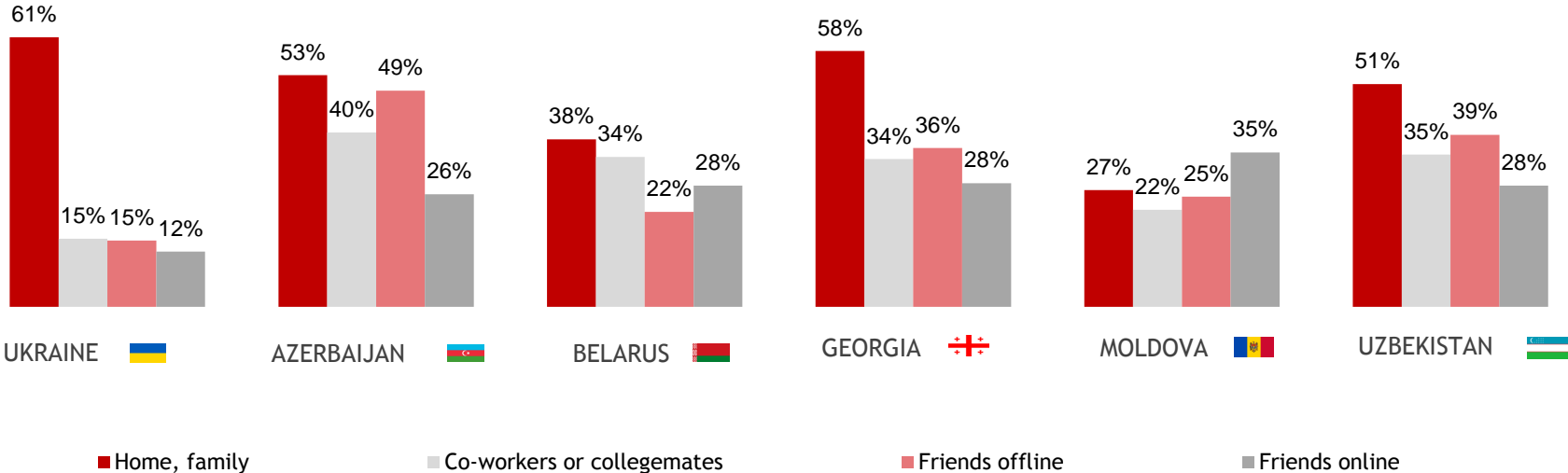


DO YOU HAVE A VOICE WITH YOUR FRIENDS AND PEERS WHEN DISCUSSING SOCIAL, POLITICAL, AND ECONOMIC ISSUES RELATING TO THE FUTURE OF THE COUNTRY?



Family has the greatest impact on the opinion of the citizens in all countries except for Moldovans whose opinion is mostly influenced by friends online

WHO HAS THE GREATEST IMPACT ON YOUR OPINION? CHOOSE NO MORE THAN 2 ANSWERS.



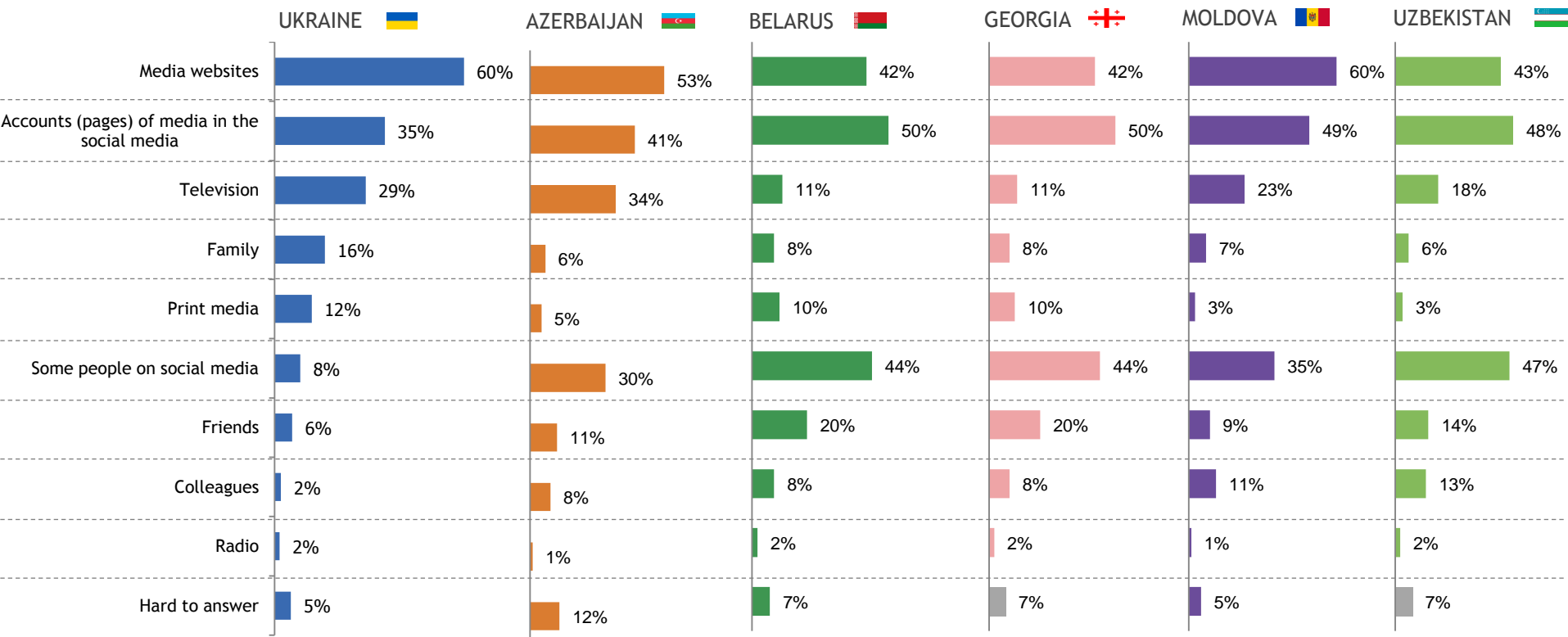
A man with a beard and a headset is sitting at a desk in a call center, working on a laptop. He is looking at the screen with a focused expression. The desk is cluttered with various items, including a water bottle, a coffee cup, and some papers. In the background, there are other computer monitors and office equipment. The overall atmosphere is professional and busy.

Sources of Information



Ukrainians, Azerbaijanians and Moldovans mostly use media websites while Belarusians, Georgians and Uzbeks - social media as their primary source of information

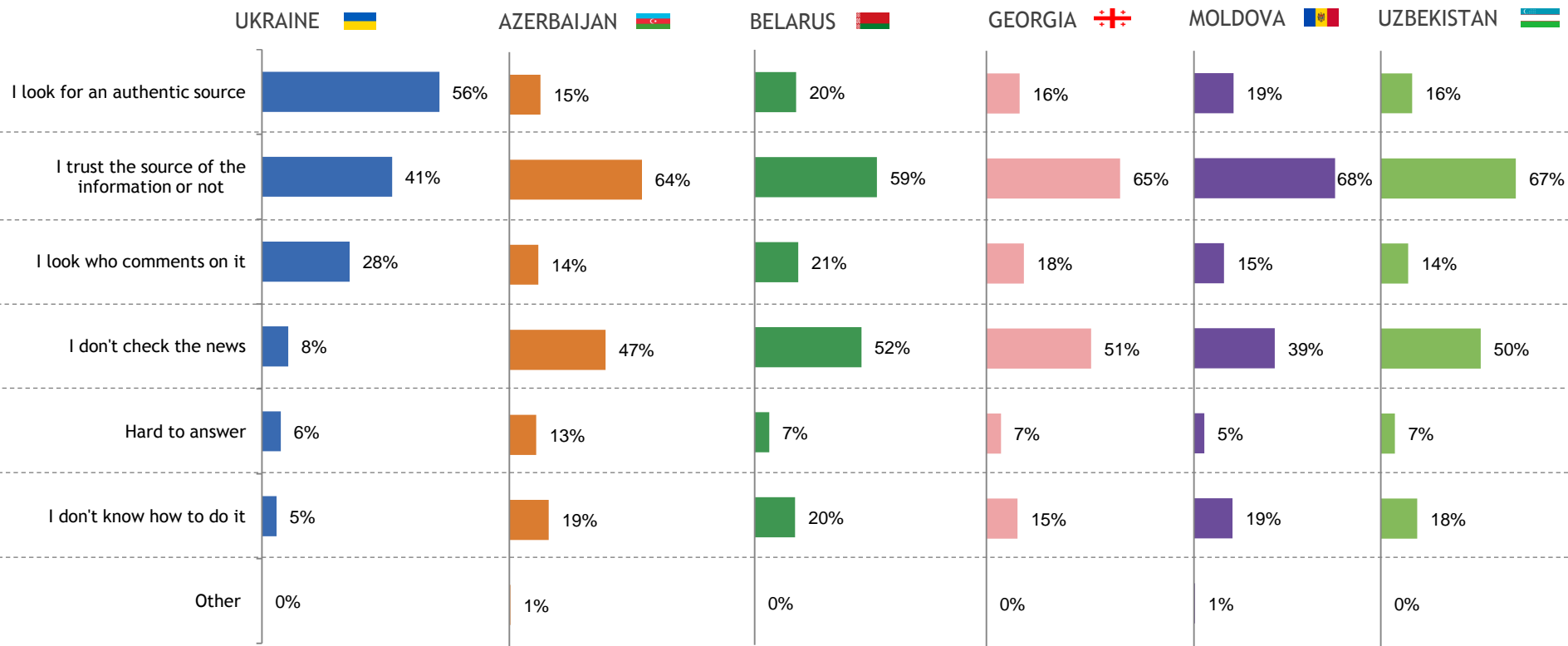
WHERE DO YOU MOSTLY GET THE NEWS ABOUT WHAT'S HAPPENING IN THE COUNTRY AND ABROAD?





Ukrainians look for authentic sources of the news most often while citizens of other countries mostly don't check the news in trusted sources or don't check them at all

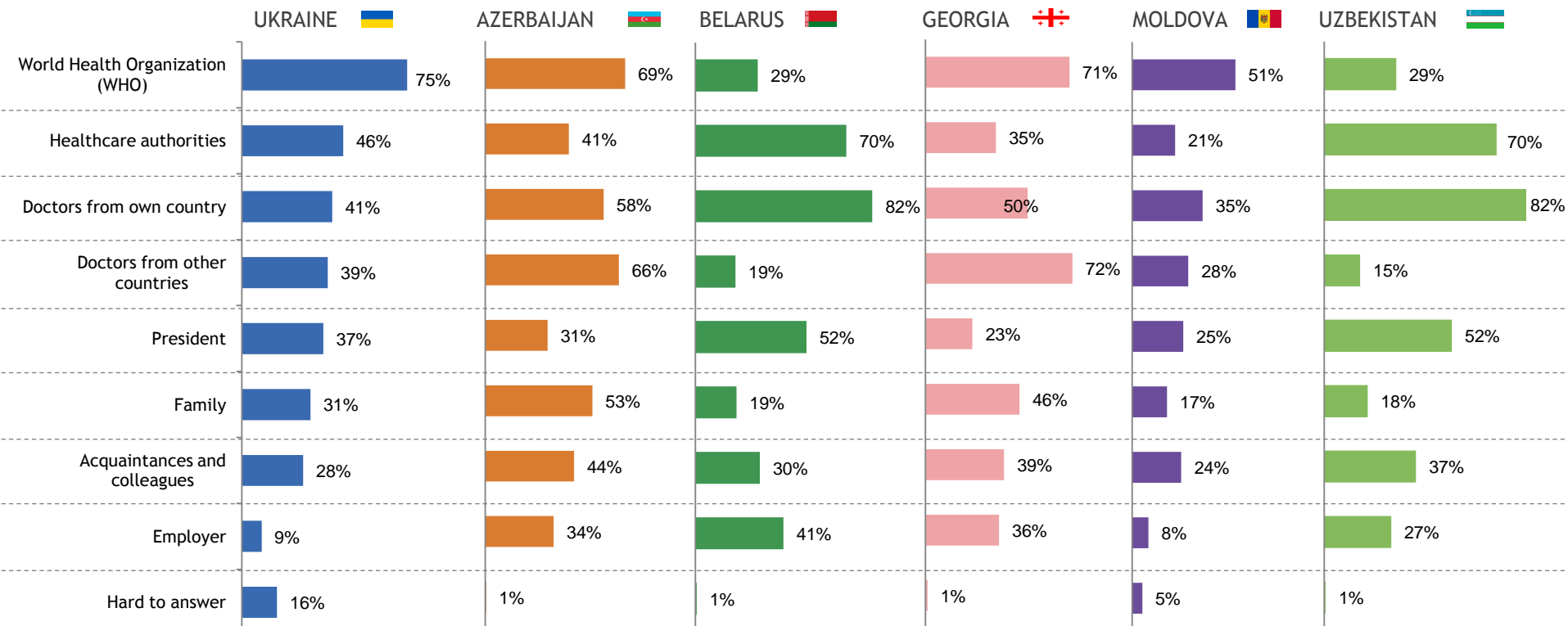
HOW DO YOU IDENTIFY THE REAL OR FAKE NEWS?





WHO is the primary source of information about COVID-19 pandemic in Ukraine and Moldova while in Azerbaijan and Georgia is it of equal importance with doctors from other countries. Local doctors is the primary source of information for Belarusians and Uzbeks

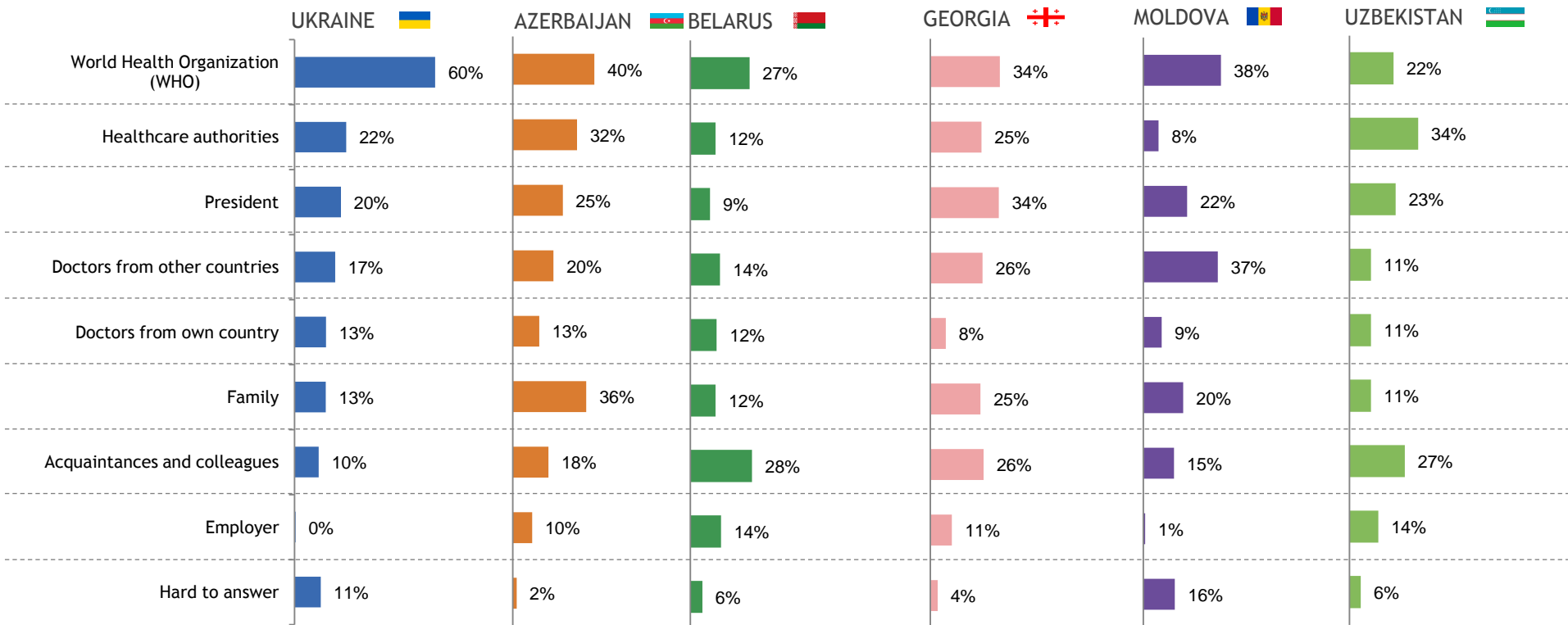
FROM WHICH SOURCES DO YOU GET INFORMATION ABOUT THE CORONAVIRUS PANDEMIC?





WHO is the most trusted source of information on COVID-19 for all countries except for Belarus and Uzbekistan

AND WHICH OF THESE SOURCES DO YOU TRUST THE MOST?

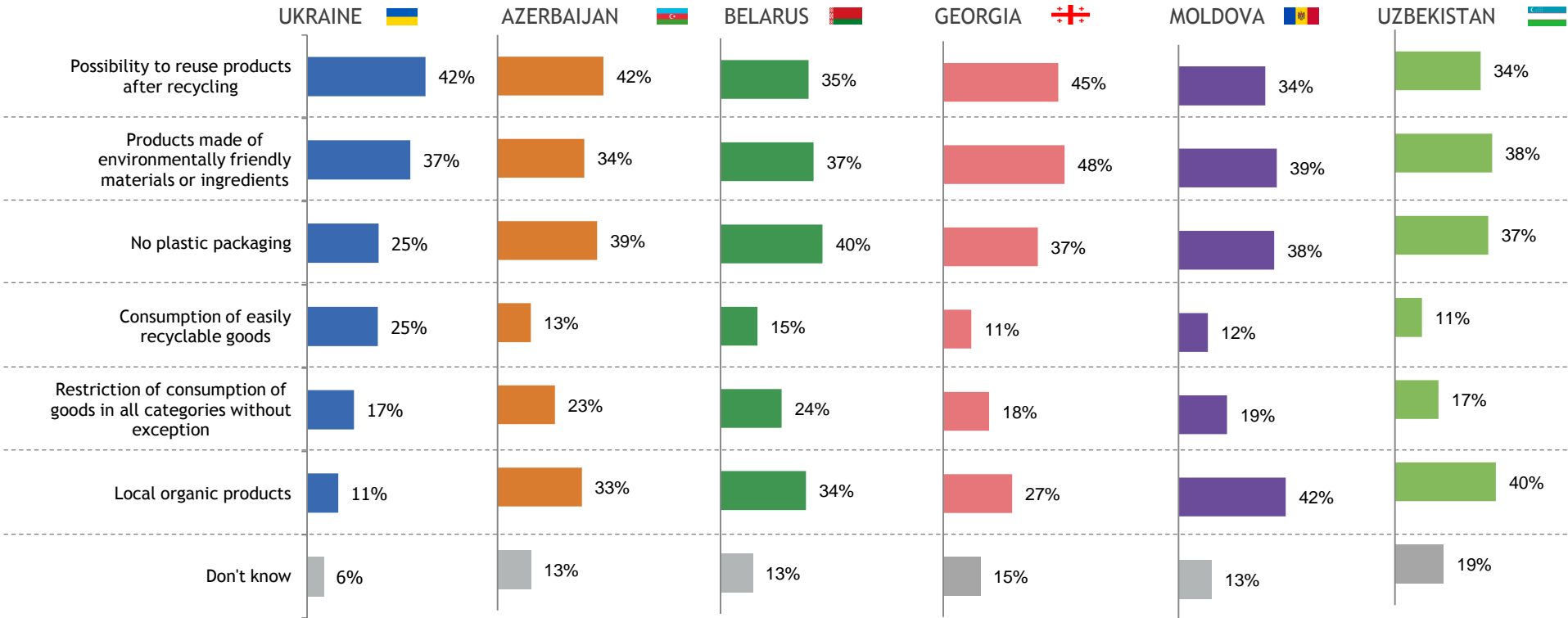


A close-up photograph of a person's hands counting stacks of US dollar bills. The person is wearing a dark blue blazer. The background is dark and out of focus. A thick red horizontal bar is positioned at the top left of the image, partially overlapping the white text area.

Conscious Consumption

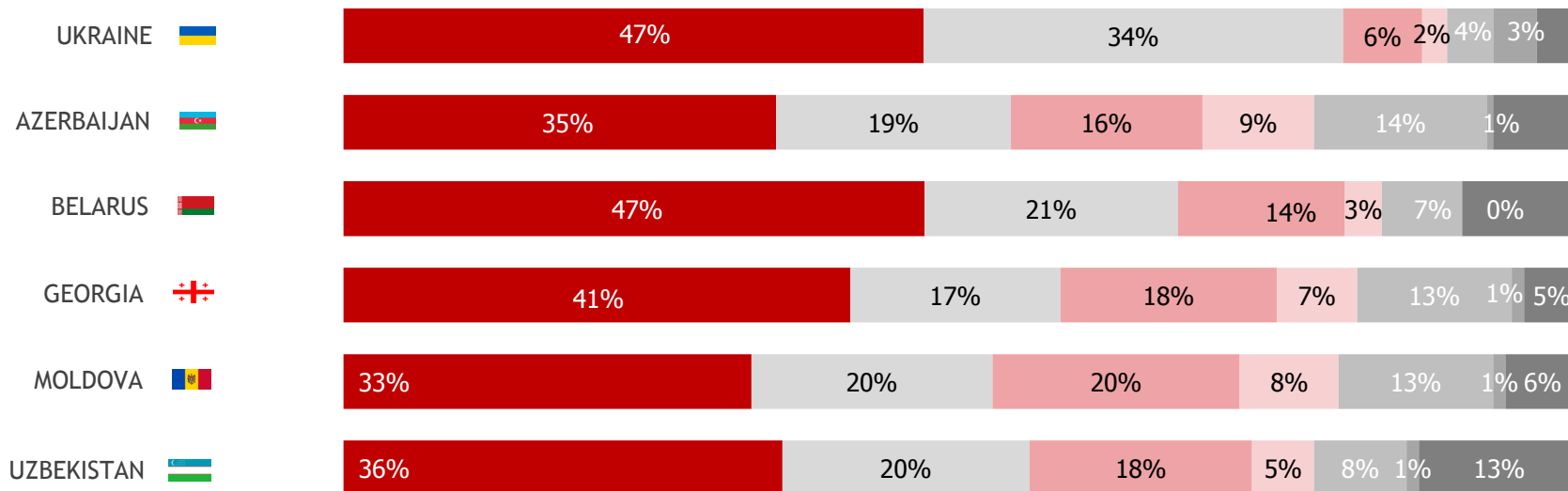
Conscious consumption mostly means a possibility to reuse products after recycling and usage of environmentally friendly ingredients for Ukrainians. For the citizens of other countries it also often means non-use of plastic packaging and usage of products of local organic origin

WHAT DOES CONSCIOUS CONSUMPTION MEAN FOR YOU?

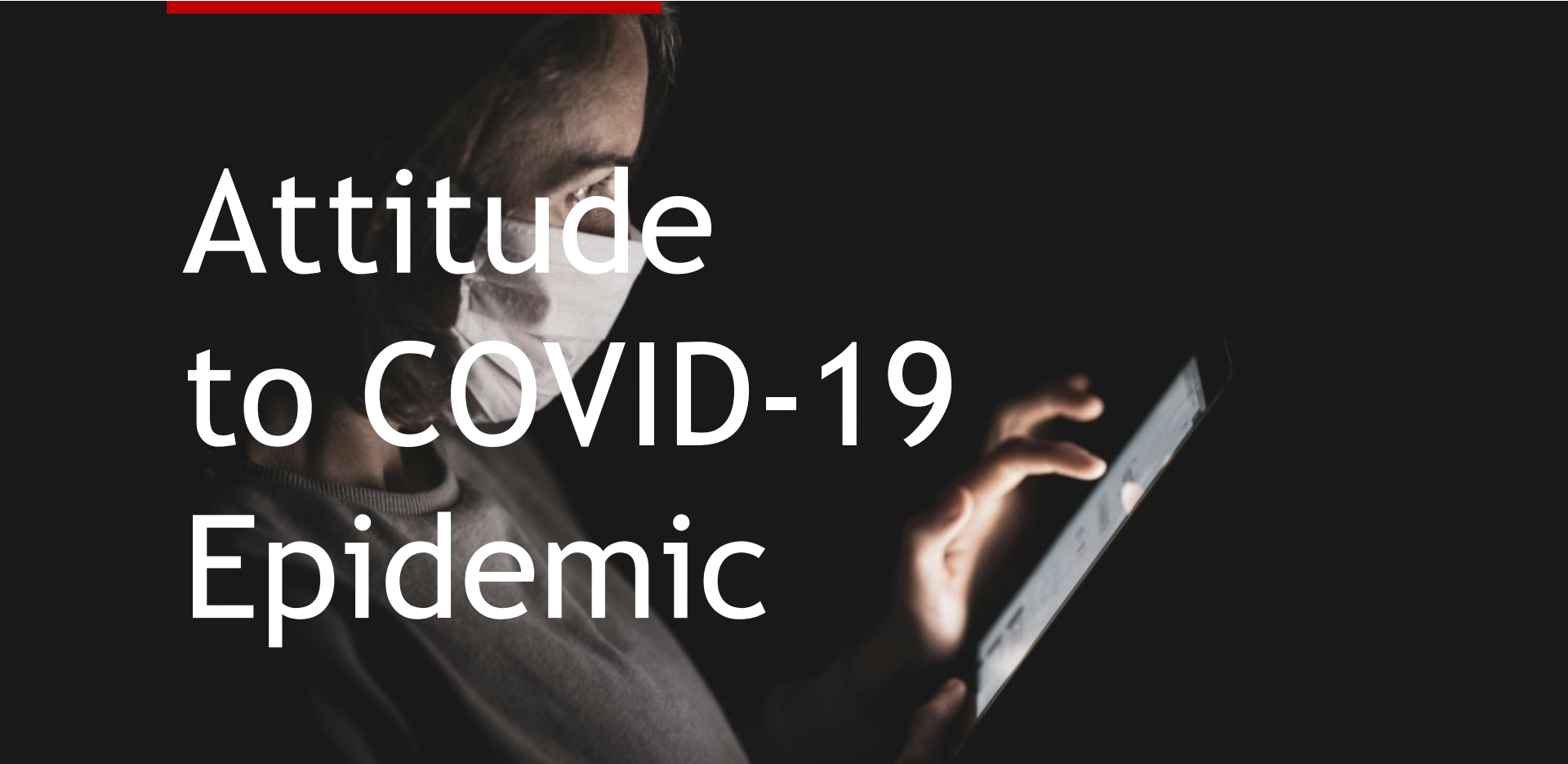




DO YOU AIM AT CONSCIOUS CONSUMPTION?



- Yes
- Rather yes
- Rather no
- No
- I would like to, but I cannot afford it yet
- I would like to, but there is a limited selection of goods where I live
- Hard to answer

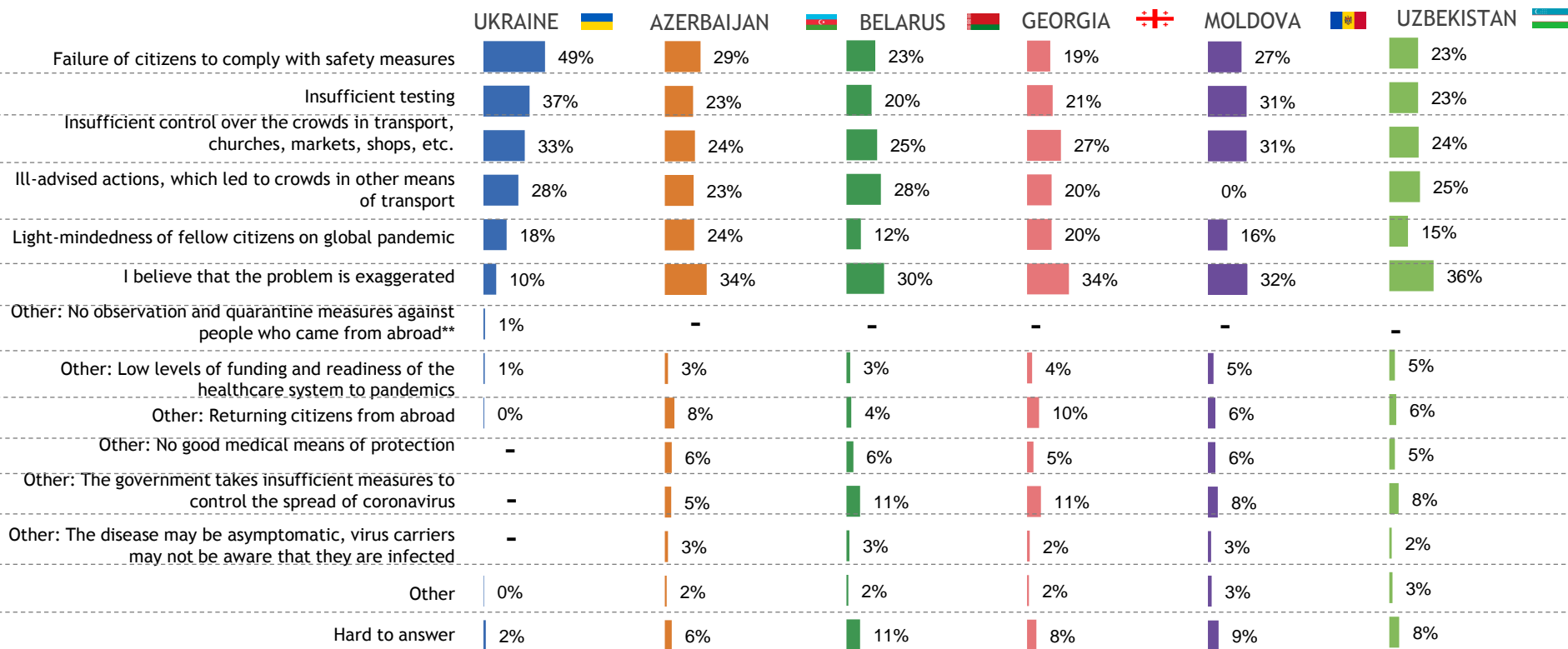
A person wearing a white face mask is shown in profile, looking at a tablet device. The scene is dimly lit, with the light from the tablet illuminating the person's face and hand. A thick red horizontal bar is positioned at the top of the image, partially overlapping the person's head.

Attitude to COVID-19 Epidemic



Ukrainians mostly blame the spread of COVID-19 on other citizens carelessness while relative majority of citizens of other countries believe that the problem is exaggerated

WHAT FACTORS HAVE THE GREATEST IMPACT ON SPREAD OF CORONAVIRUS IN YOUR COUNTRY? CHOOSE NO MORE THAN 2 ANSWERS.

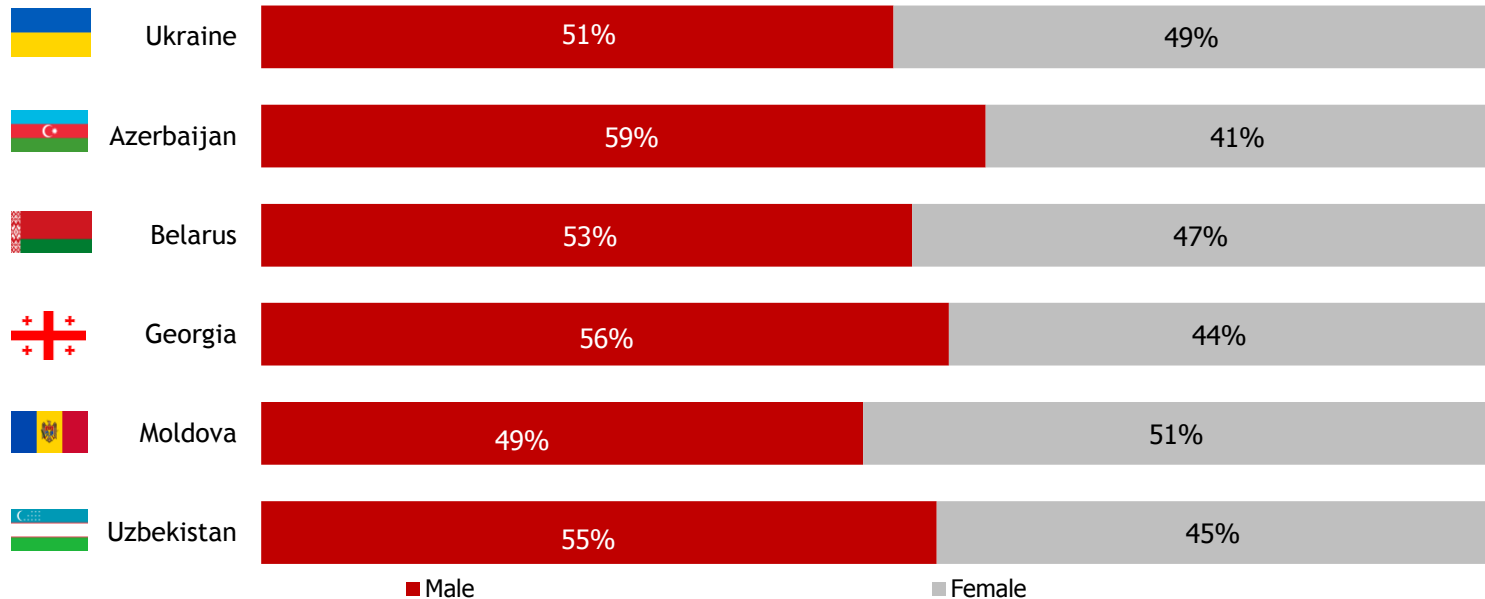


A photograph of a busy city street at night, likely in London, with a large crowd of people walking. The street is illuminated by streetlights and building lights. A sign for 'Superdry' is visible in the background. The text 'Socio-demographic Block' is overlaid in large white letters on the image.

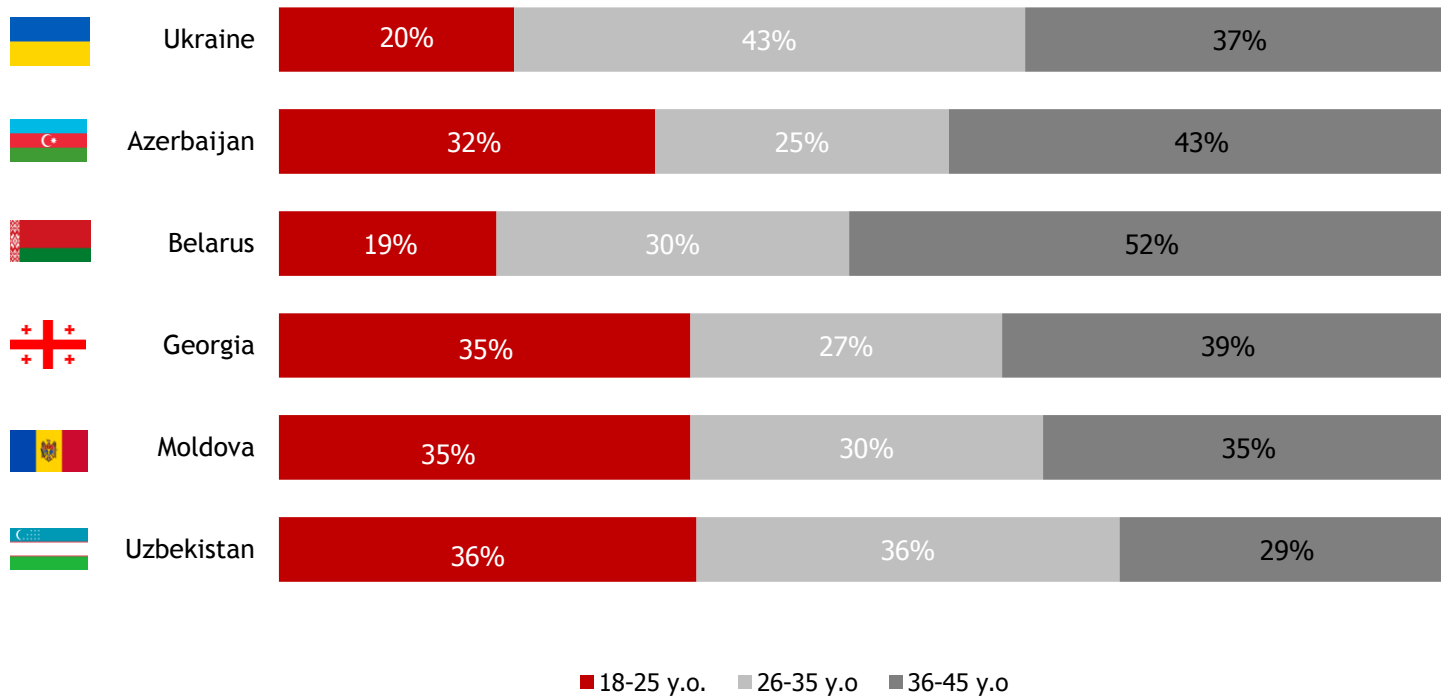
Socio-demographic Block



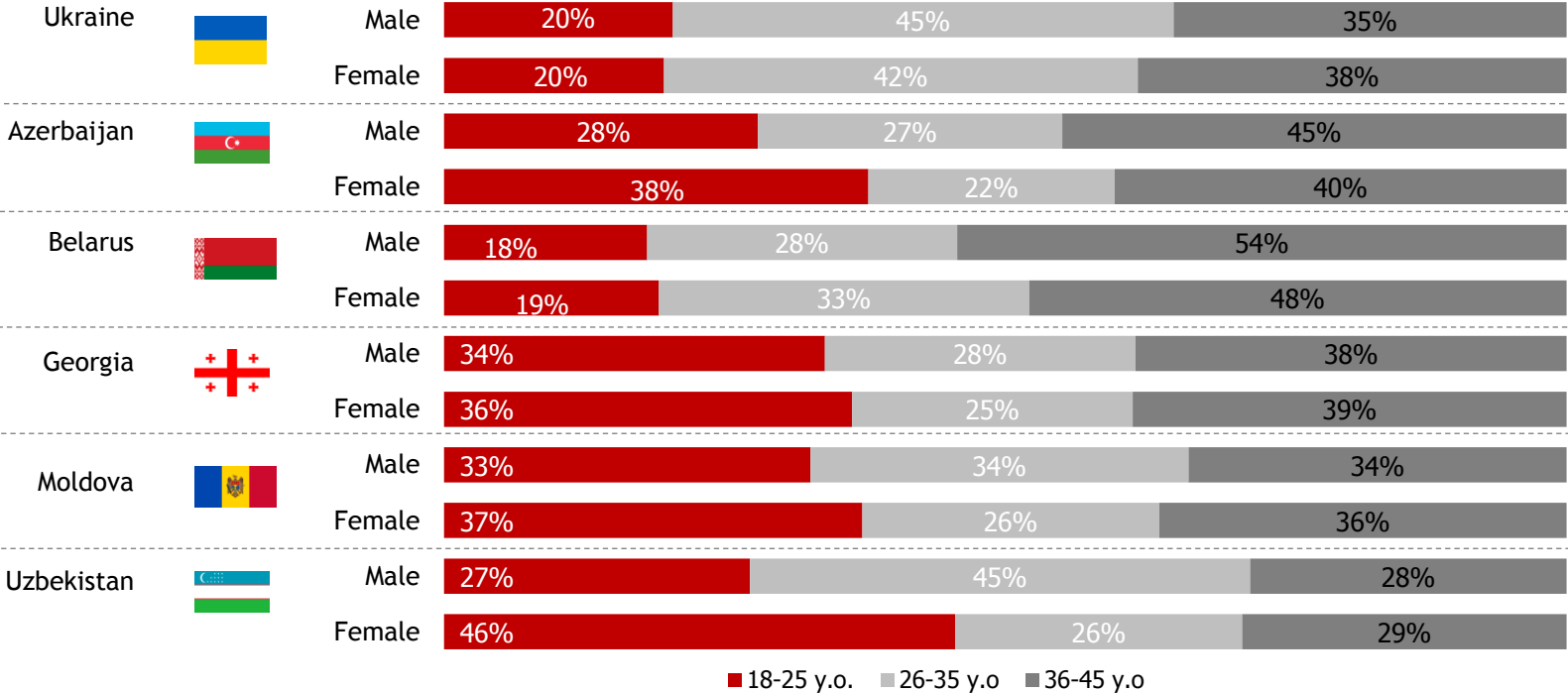
Gender distribution of the respondents is almost equal in all countries except for Azerbaijan, Georgia and Uzbekistan where men prevail



The oldest respondents are in Belarus and the youngest - in Uzbekistan

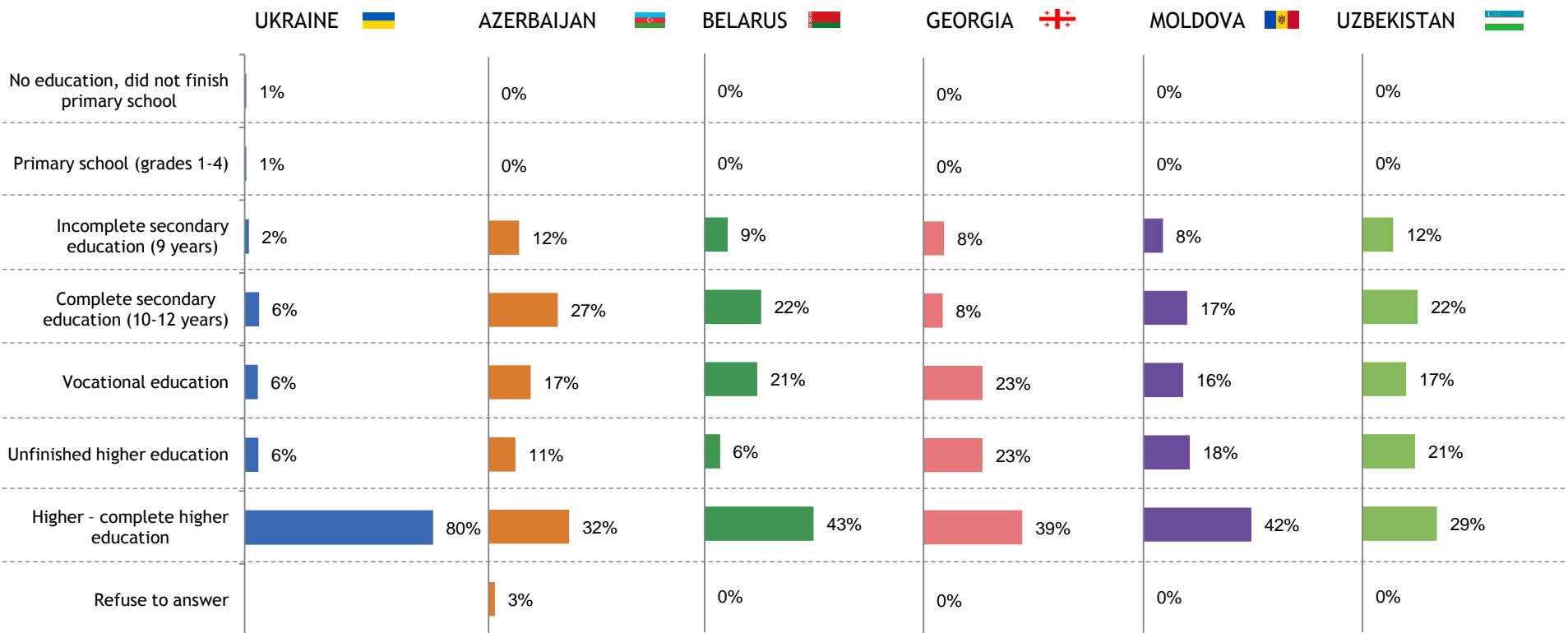


The largest age difference between men and women are in Azerbaijan and Uzbekistan possibly because these countries have the strongest concept of a man as breadwinner and it often anticipates that husband should be much older than wife





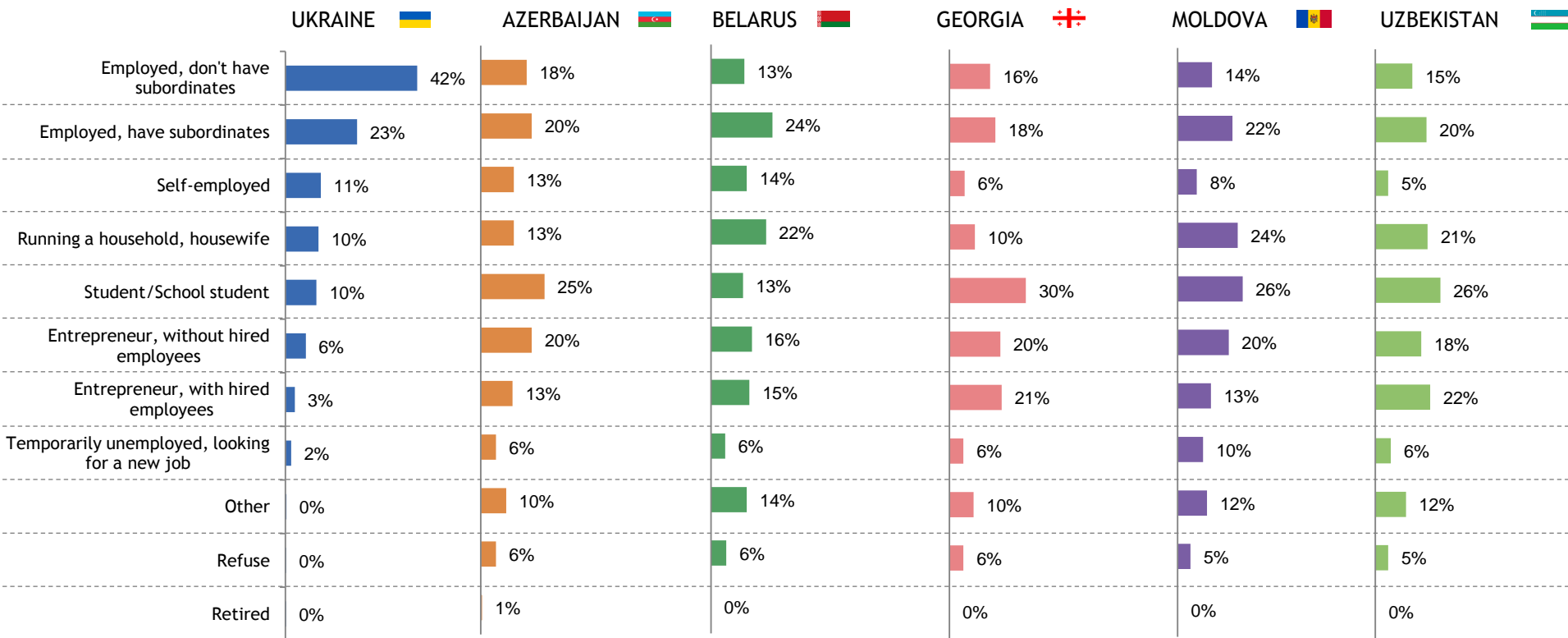
WHAT IS THE LEVEL OF YOUR EDUCATION?





The highest share of entrepreneurs was surveyed in Georgia and the lowest - in Ukraine

WHAT IS YOUR MAIN OCCUPATION?





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Interested?
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