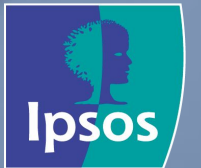


CONSUMER BAROMETER COVID-19

Wave 1 report
Georgia

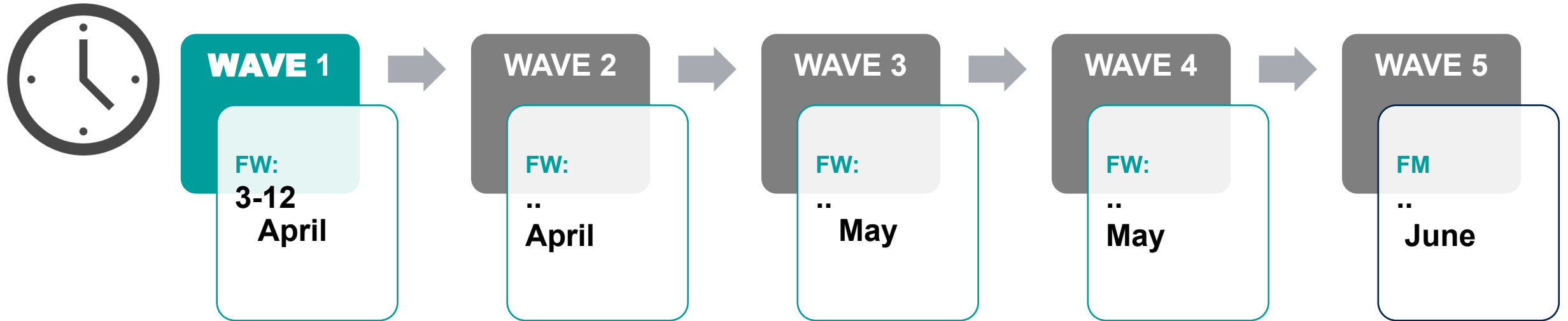
Ipsos

GAME CHANGERS



STUDY DESIGN

- ❑ Method: CATI
- ❑ TA: 18-55 y.o. (quoted gender, age, Tbilisi / other city)
- ❑ Sample size: 500 per wave
- ❑ Periodicity: once per 2 weeks



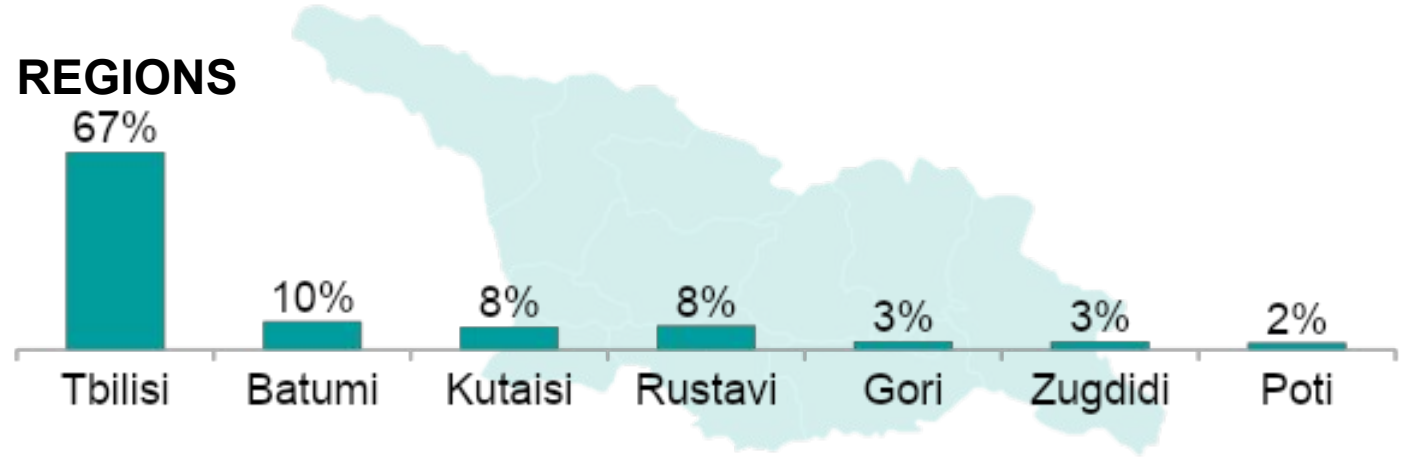
RESPONDENTS PROFILE (1/2)

Consumer Barometer COVID-19. Wave 1

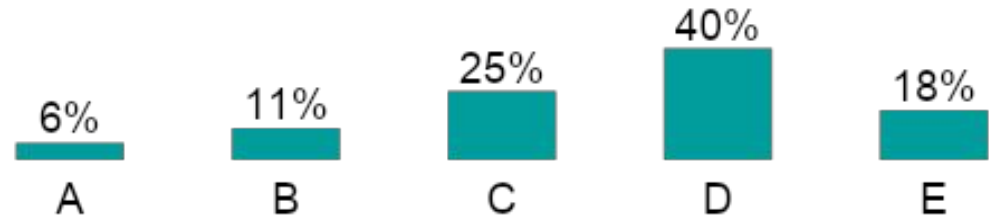
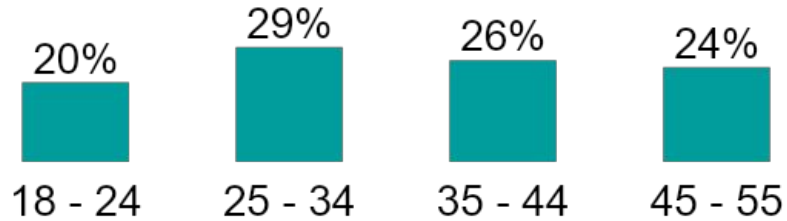
GENDER



REGIONS



AGE

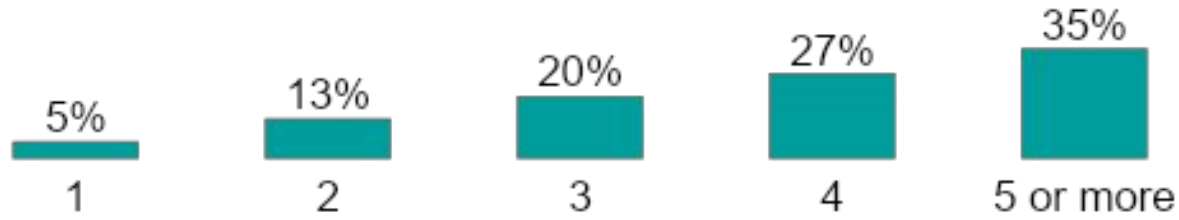


can afford a car or even more can afford large appliances large appliances purchase is a problem not enough for clothes not enough for food

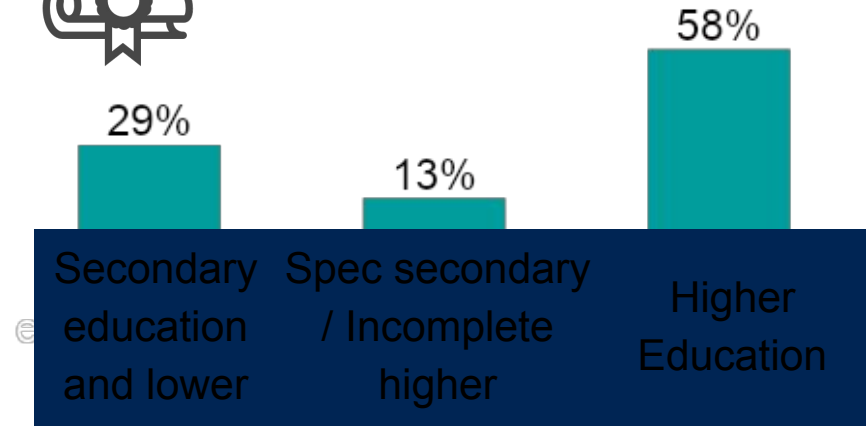
RESPONDENTS PROFILE (2/2)

Consumer Barometer COVID-19. Wave 1

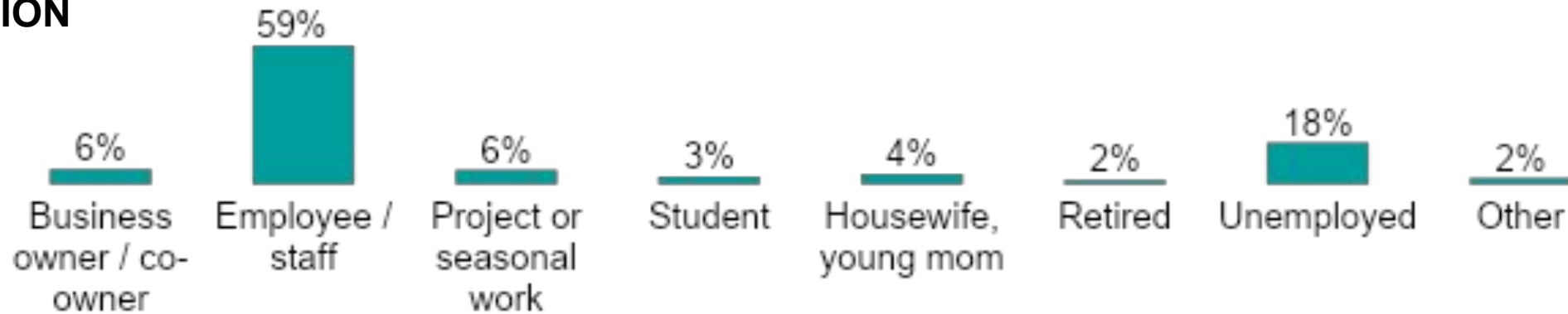
HOUSEHOLD SIZE



EDUCATION



OCCUPATION



COVID BEHAVIOUR

- Level of concern and protective methods used
- Support to GOV preventive strategy
- Changed mobility and transport methods
- Changed work conditions



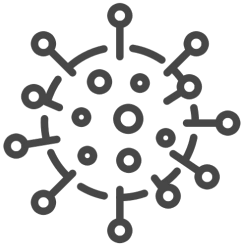
1

COVID-19 LEVEL OF ANXIETY

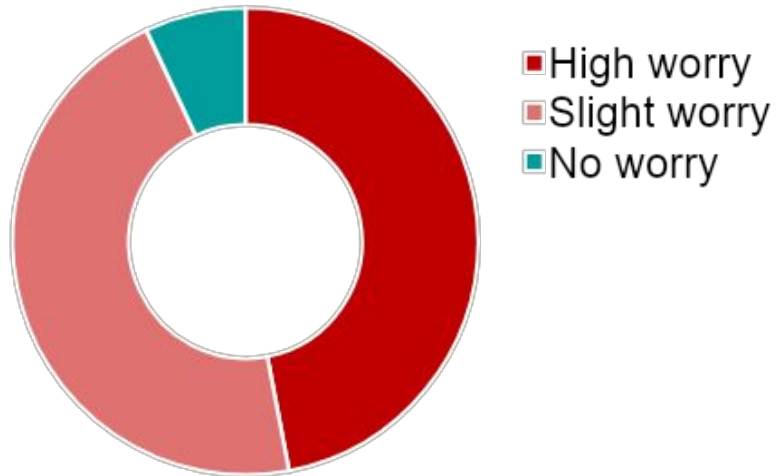
Majority of respondents worry about COVID-19 spread through the country.
96% restricted their mobility (more than 1/3 on full isolation).

COVID-19 LEVEL OF ANXIETY

How worried are you about the spread of COVID-19 /
Coronavirus in Georgia?



93% feel worry related to COVID-19



MOBILITY RESTRICTIONS

How have you personally behaved during the last 7 days?



35% don't leave home at all



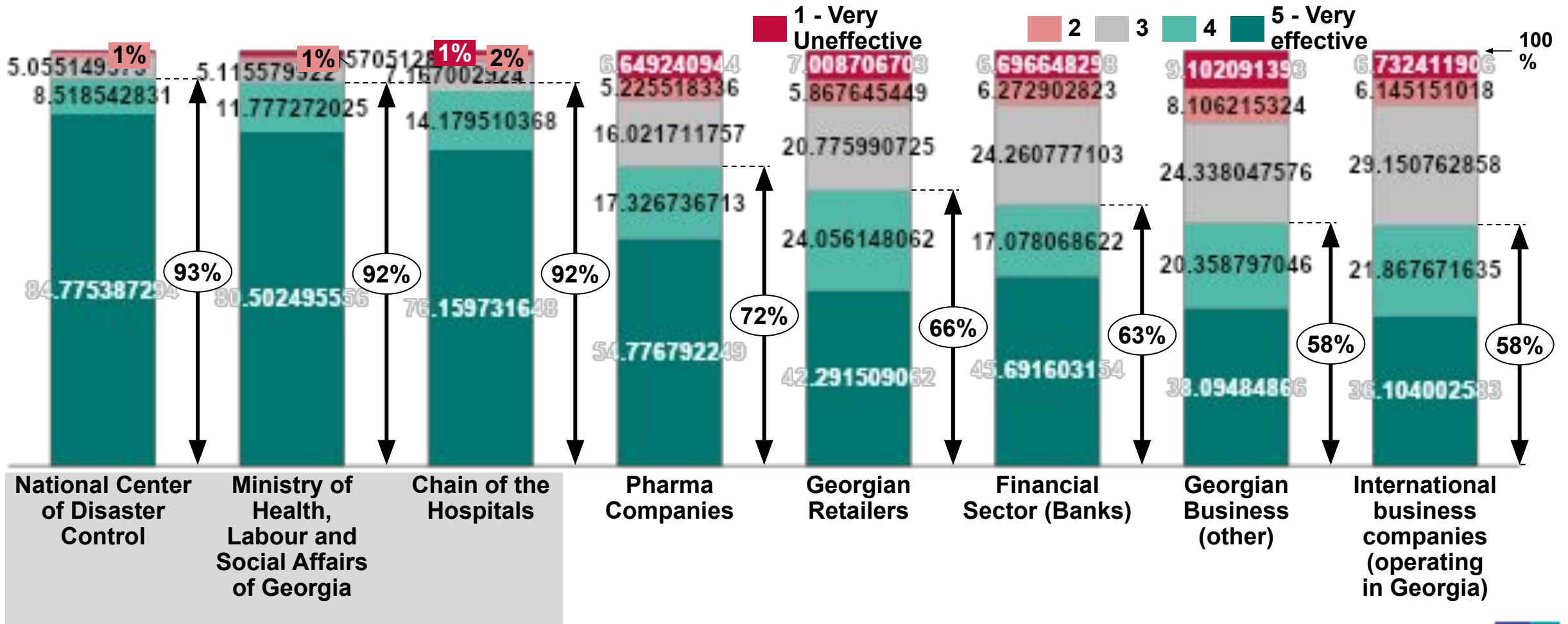
61% leave home if only necessity



4% as before, not restricting mobility

ATTITUDE TOWARDS AUTHORITIES

Business is perceived more neutrally than state institutions in appraisals for effectiveness.

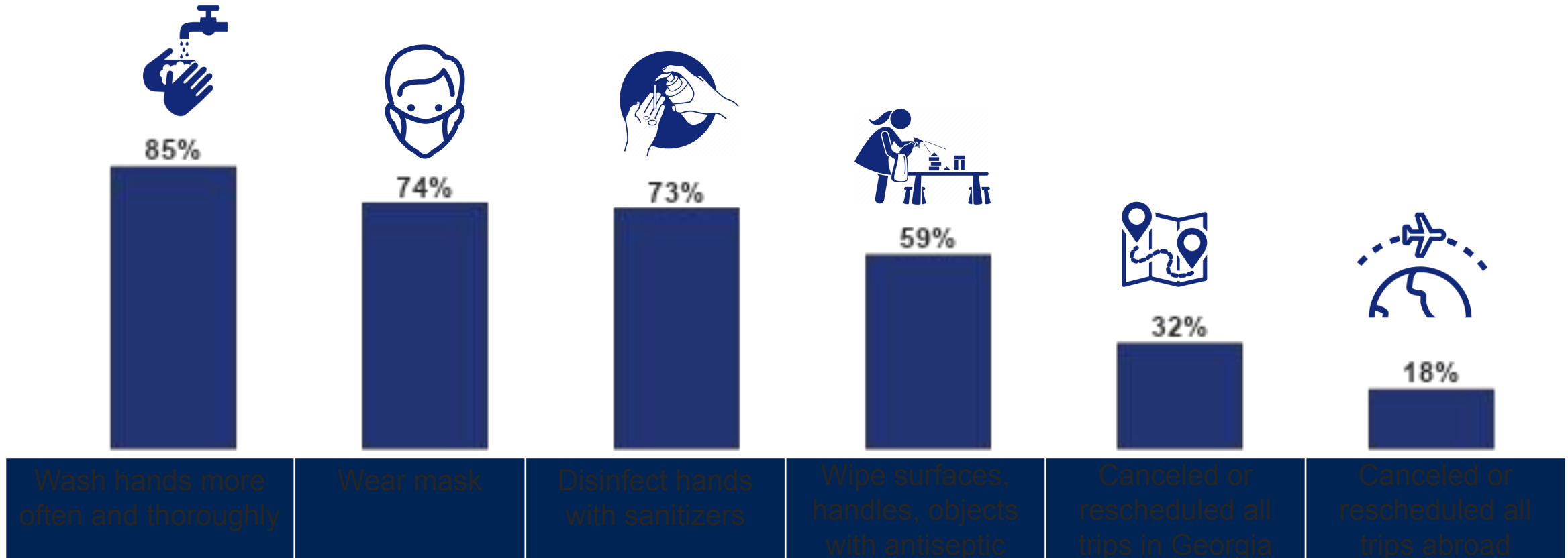


COVID-19 PROTECTIVE MEASURES

85% started to wash hands more often and thoroughly to prevent COVID-19 spread. $\frac{3}{4}$ of respondents report wearing mask or using hand sanitizers.

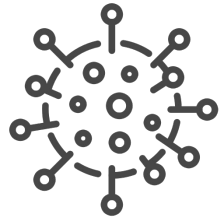
PERSONAL MEASURES TAKEN

Which measures have you personally taken in the last 7 days?



COVID-19 IMPACT ON WORK

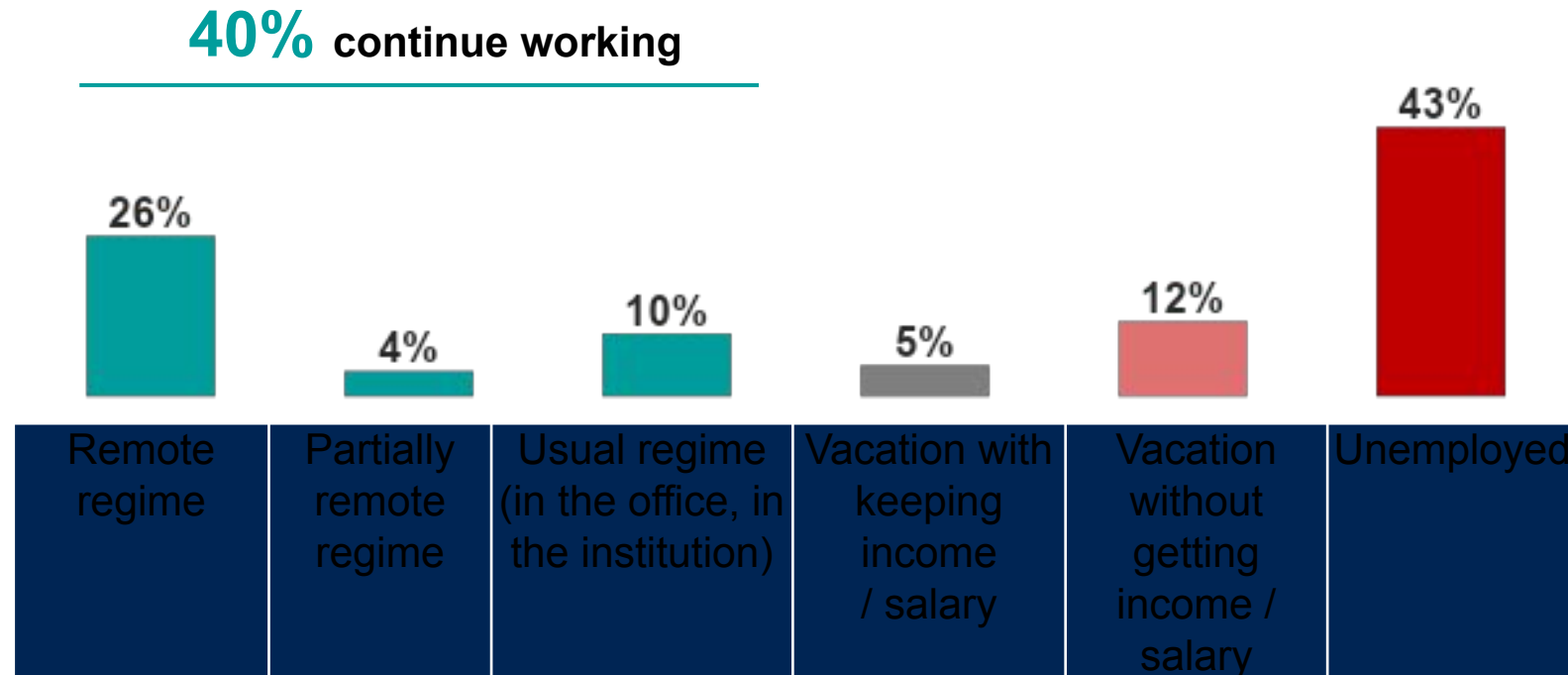
40% continue to work (mostly in remote regime). 12% are on vacation without getting income and salary and 43% report themselves as unemployed now.



55%
are having no
income now

WORKING CONDITIONS

How have you worked in the last 7 days?

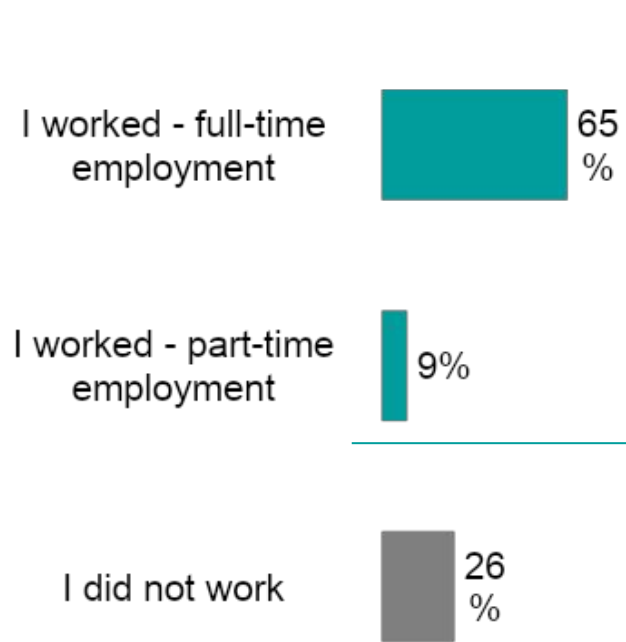


COVID-19 IMPACT ON WORK REGIME

26% of previously employed people lost their job because of quarantine and else 16% are on vacation without getting income/ salary.

OCCUPATION BEFORE QUARANTINE

What was your occupation before quarantine?

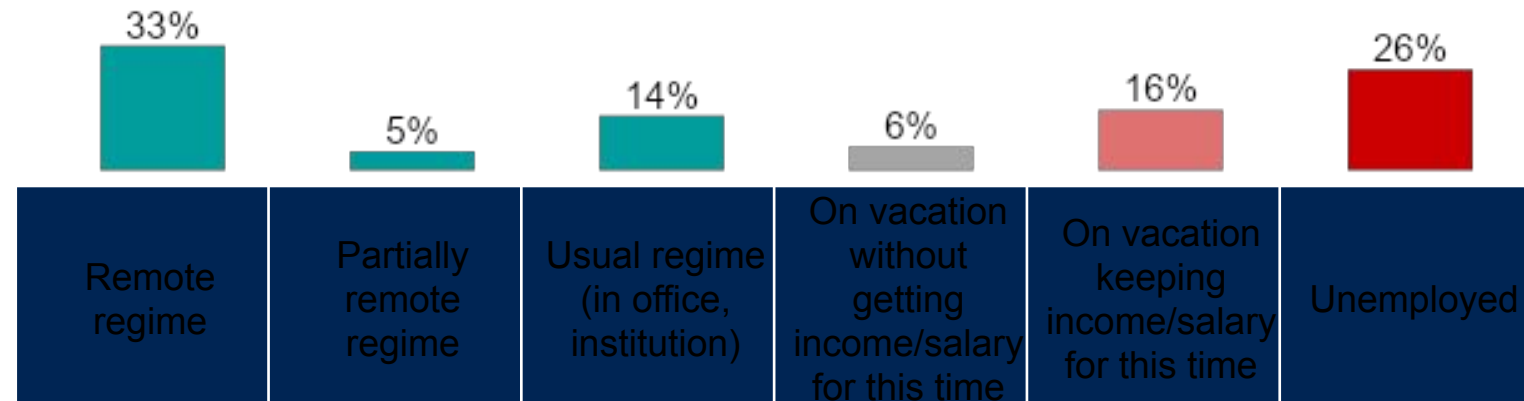


WORK IN LAST 7 DAYS

How have you worked in the last 7 days?

74% were employed before quarantine

and 26% of them lost their job

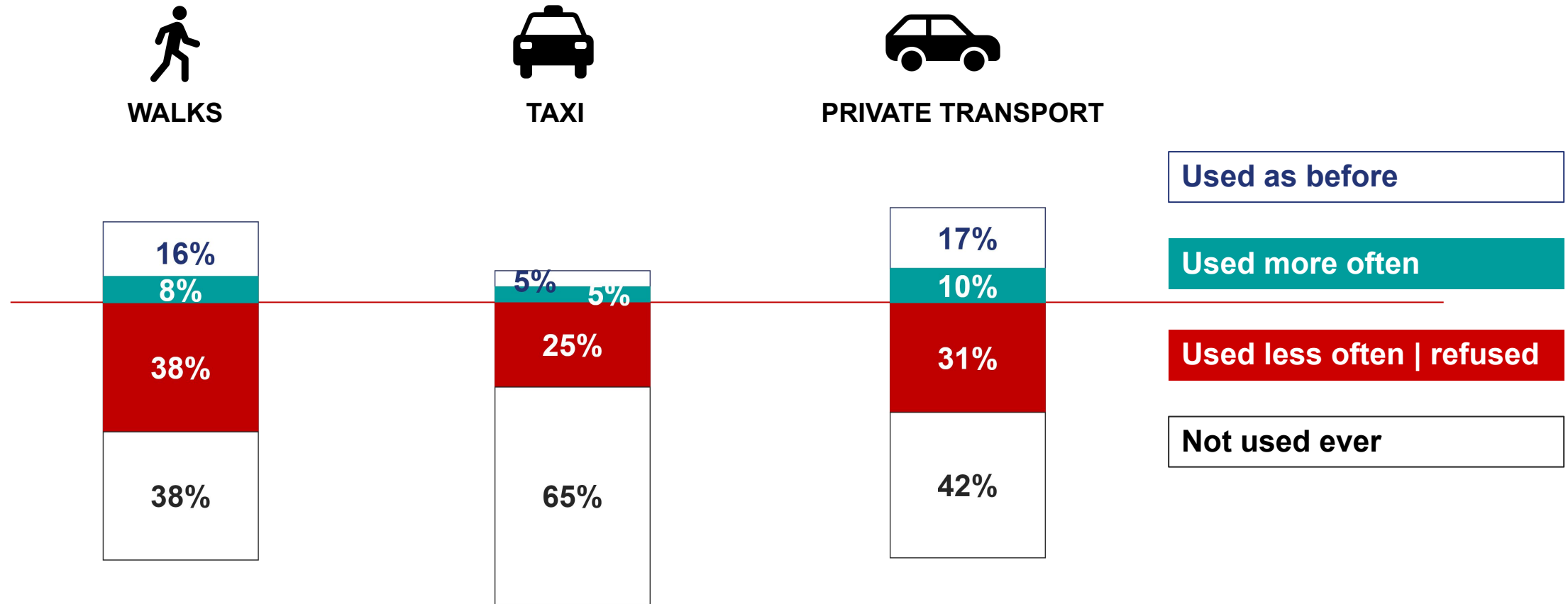


COVID-19 IMPACT ON TRANSPORTATION

Mobility restriction is reflected by decreased usage of all means of transportation. Due to general drop in mobility – people also report less walking.

TRANSPORTATION IN RECENT 7 DAYS

How COVID-19 / Coronavirus affected your movement and transportation in city in the last 7 days?

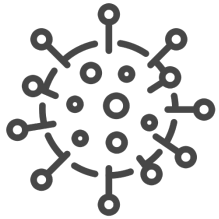


PERSONAL BUDGET RESERVE FOR COVID-19 QUARANTINE

Only 22% can afford quarantine for more than a month. 29% will run out of their savings after two weeks of quarantine (by the end of April).

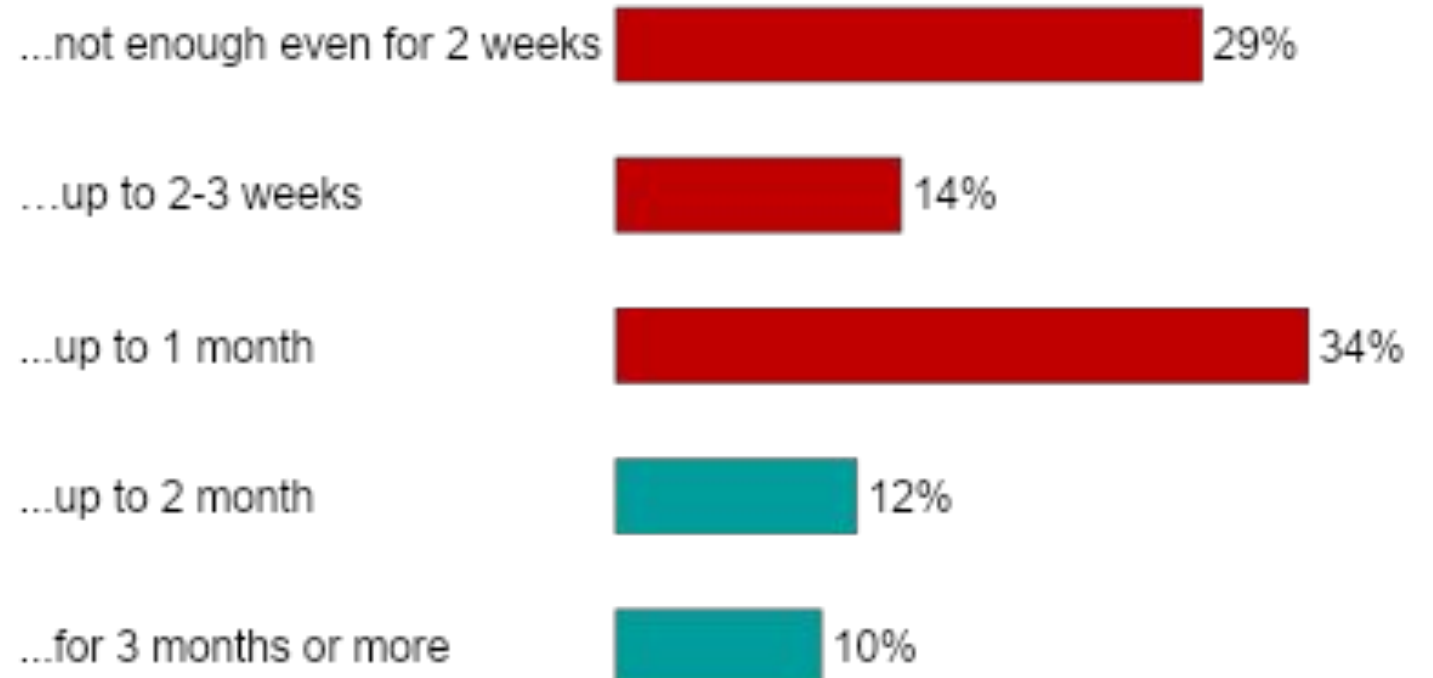
MY SAVINGS ARE ENOUGH TO STAY AT QUARANTINE...

Which statement is best to describe is the most relevant to you?



29%
can not afford
EVEN 2 WEEKS

77%
can not afford quarantine
**FOR MORE THAN 1
MONTH**



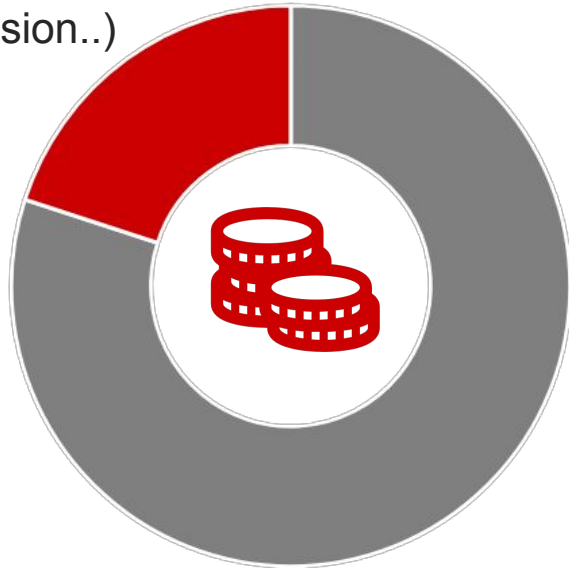
COVID-19 IMPACT ON PERSONAL INCOME

20% of respondents declare that they are being delayed regular payments. 56% report that their income decreased.

DELAYS IN RECEIVING PERSONAL INCOME

20%

experience delays in receiving their income (salary, pension..)

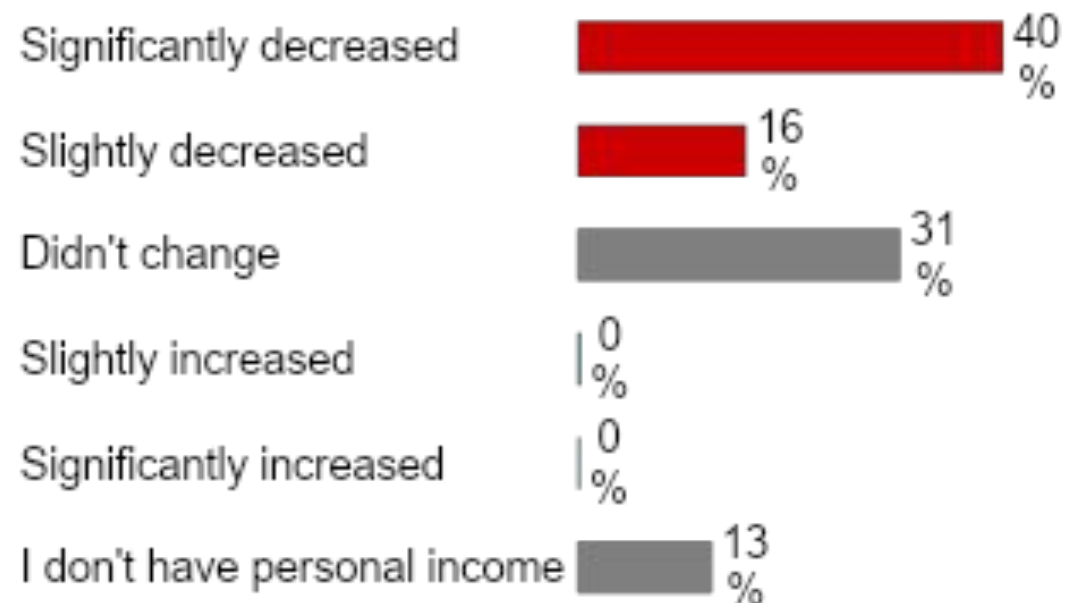


Are your regular payments (salaries, pensions, benefits, etc.) delayed now?

CHANGES IN PERSONAL INCOME

56% declare decrease

of personal income as a result of quarantine and other anti-COVID-19 restrictions.



How your personal income has changed after the government imposed quarantine and other restrictions to avoid COVID-19?

CONSUMER CONFIDENCE

- Current state of national economy
- Expectation how economy will change in 6M
- Current financial situation
- Expectation how financial situation will change in 6M



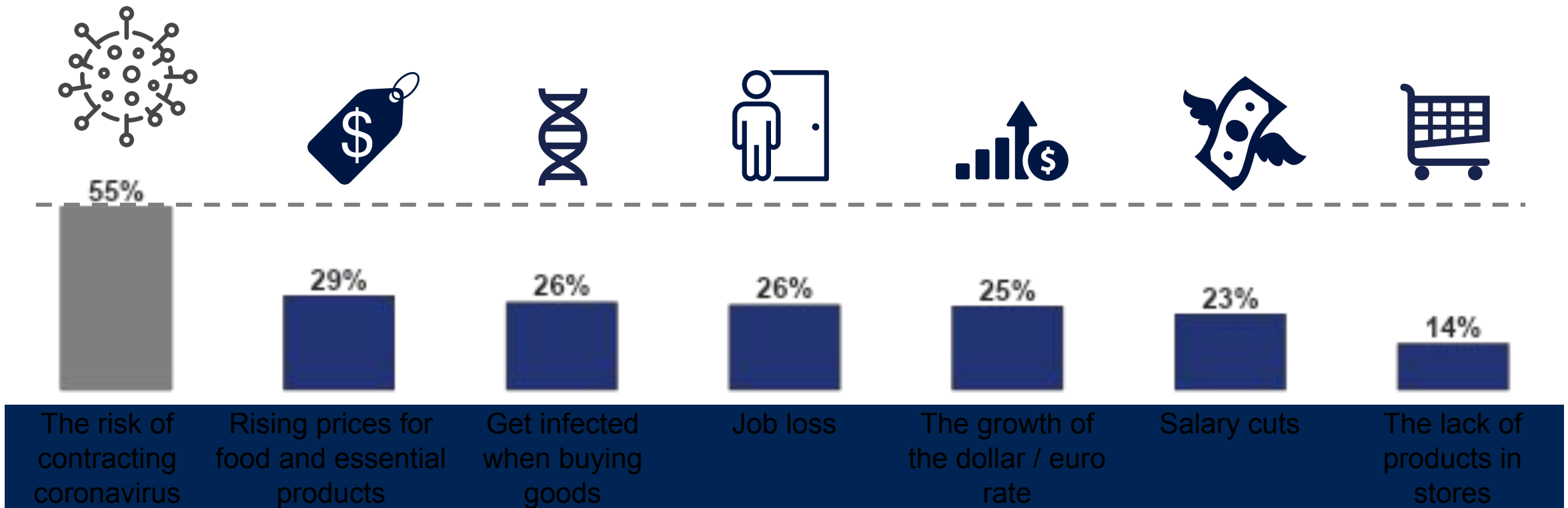
2

TOP SCORES RELATED TO COVID-19

The risk of getting infected scares people much more than possible financial difficulties.

TOP NOWADAYS SCARES

Which of the following scares you the most nowadays?

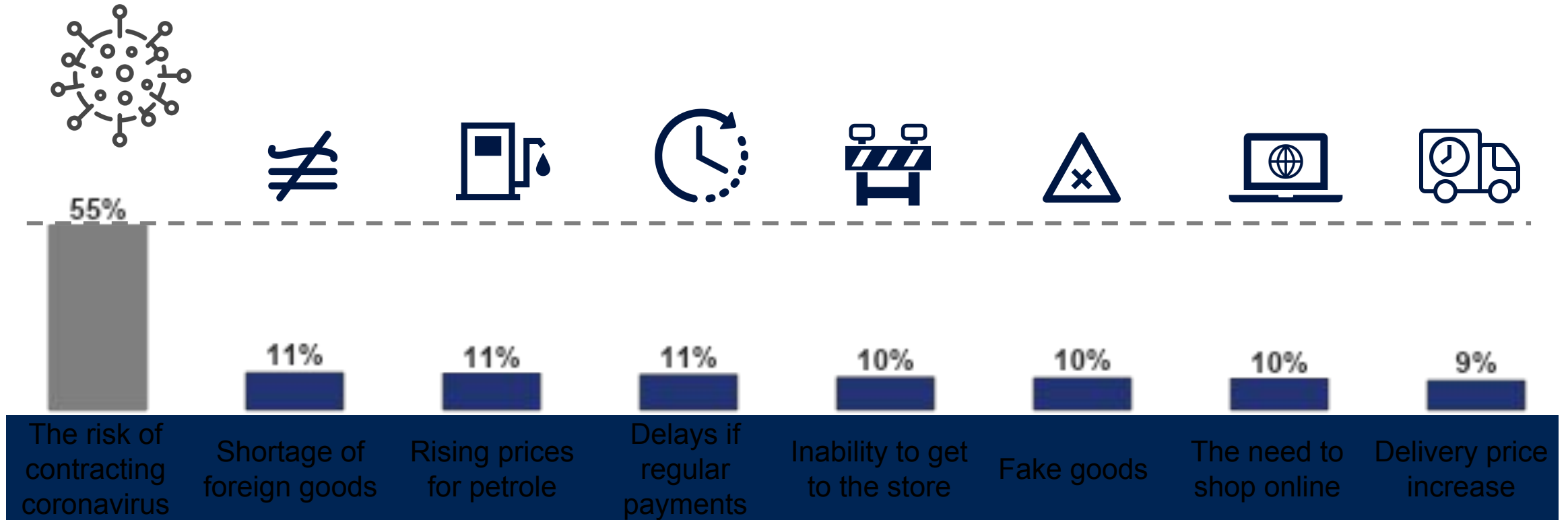


LESS POPULAR SCARES RELATED TO COVID-19

Respondents are less scared of delivery price increase.

LESS POPULAR SCARES

Which of the following scares you the most nowadays?



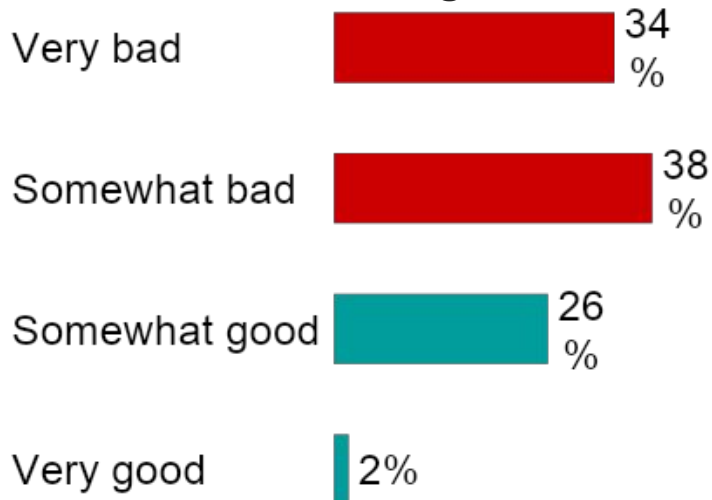
PERCEPTION OF ECONOMICAL SITUATION IN GEORGIA

Most people describe current national economical situation as bad and expect it will be even worse in next 6 months.

EVALUATION OF CURRENT ECONOMIC SITUATION in GEORGIA

Thinking about our economic situation, how would you describe the current economic situation in Georgia? It is...?

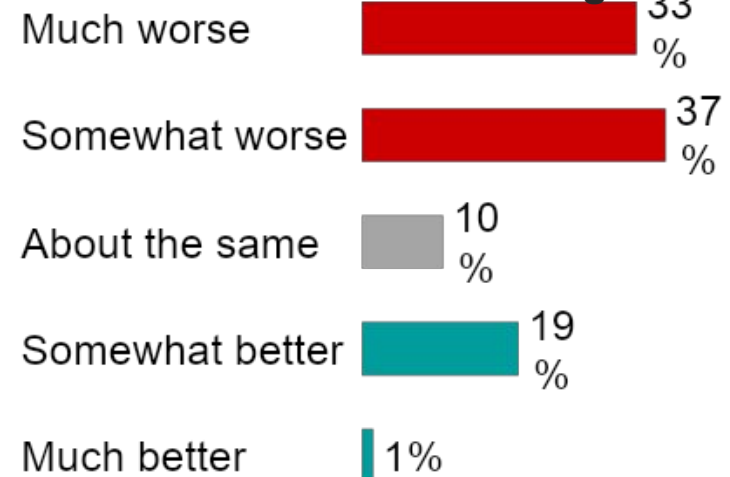
72% Report bad current economical situation in Georgia



ANTICIPATIONS ON COUNTRY ECONOMIC SITUATION IN NEXT 6 MONTHS

Think about the next 6 months, do you expect that the economic situation in Georgia compared to the current situation will be ...?

70% expect worsening of the country's economic situation in the coming 6 months



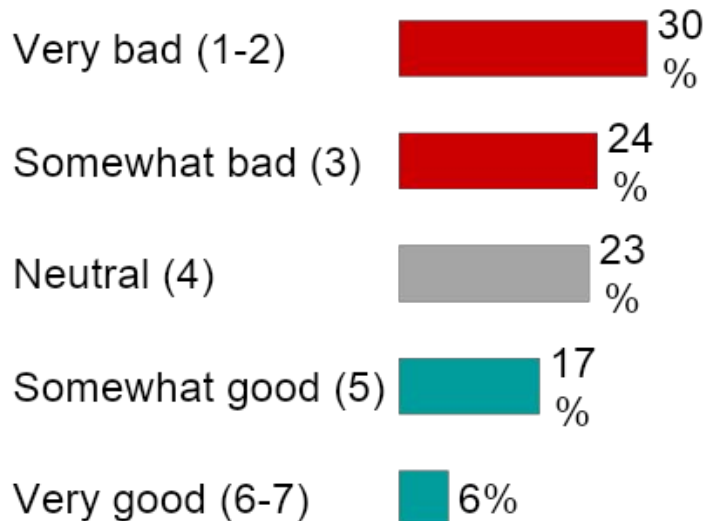
PERCEPTION OF PERSONAL FINANCIAL SITUATION

Positive expectations in personal financial situation are coherent to anticipations for national economics. Negative outlooks for country's economics are more intense than those for personal finance.

CURRENT PERSONAL FINANCIAL SITUATION

Rate your current financial situation from 1 to 7, where 7 means your personal financial situation is very strong today and 1 means it is very weak.

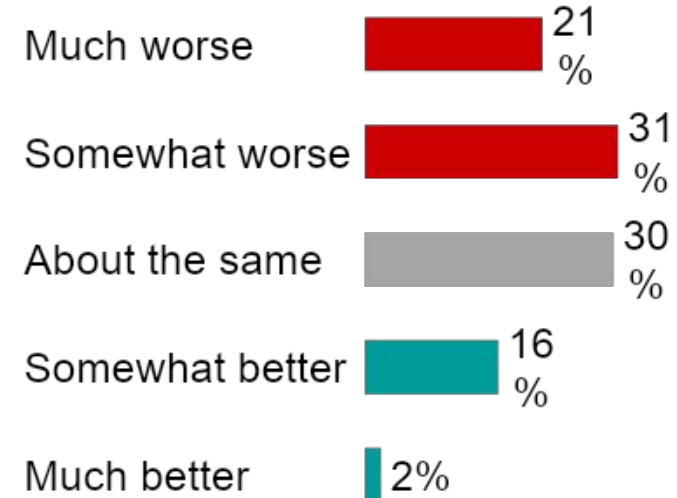
54% Report bad personal financial situation



6-MONTHS OUTLOOK ON PERSONAL FINANCE

Looking ahead six months from now, do you expect your personal financial situation will be ... than it is now?

52% Expect worsening of personal financial situation



PERCEPTION OF PERSONAL FINANCIAL SITUATION. PROFILING (1/2)

Will worsen (much or slightly)

PESSIMISTS 52%

60% not satisfied with personal financial situation

Will stay about the same

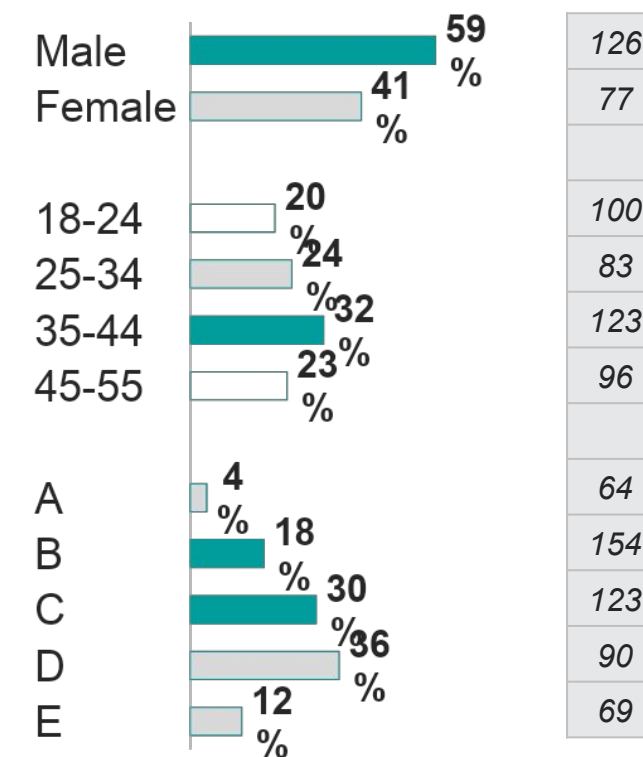
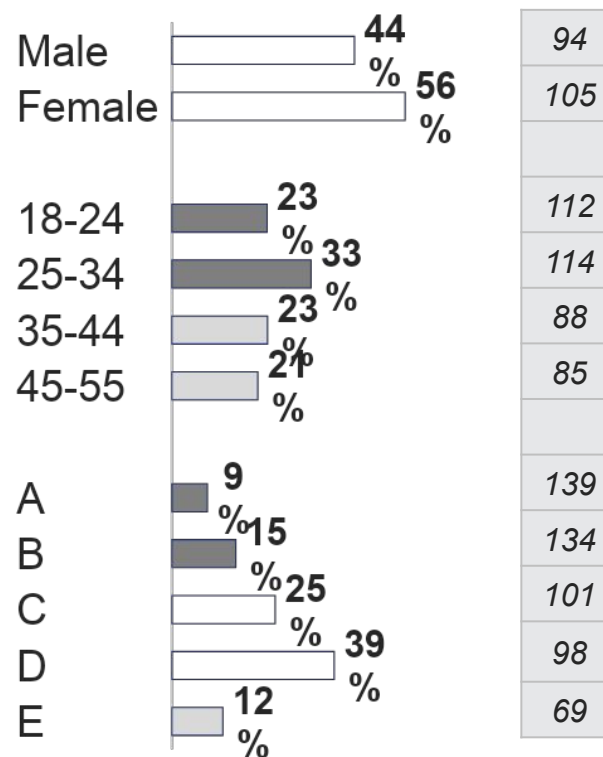
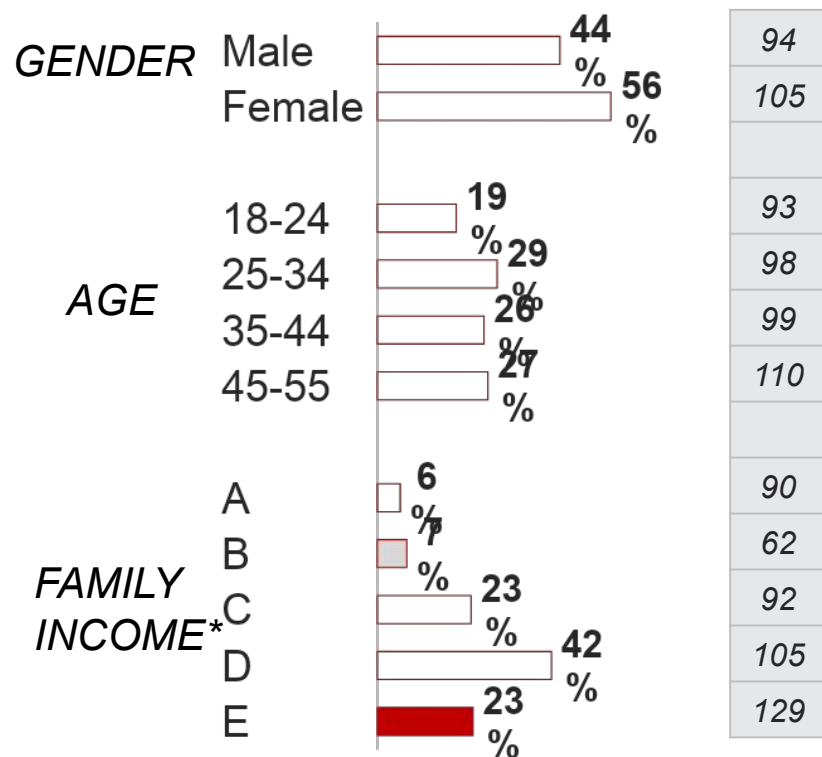
NEUTRALS 30%

43% not satisfied with personal financial situation

Will improve (much or slightly)

OPTIMISTS 18%

52% not satisfied with personal financial situation



INCOME*: A – can afford a car or even more, B – can afford LA, C – LA is a problem, D – not enough for clothes, E – not enough for food

Affinity >110 means group is bigger among TA vs Total respondents.
Affinity <90 means group is smaller among TA vs Total respondents.



PERCEPTION OF PERSONAL FINANCIAL SITUATION. PROFILING (2/2)

Will worsen (much or slightly)

Will stay about the same

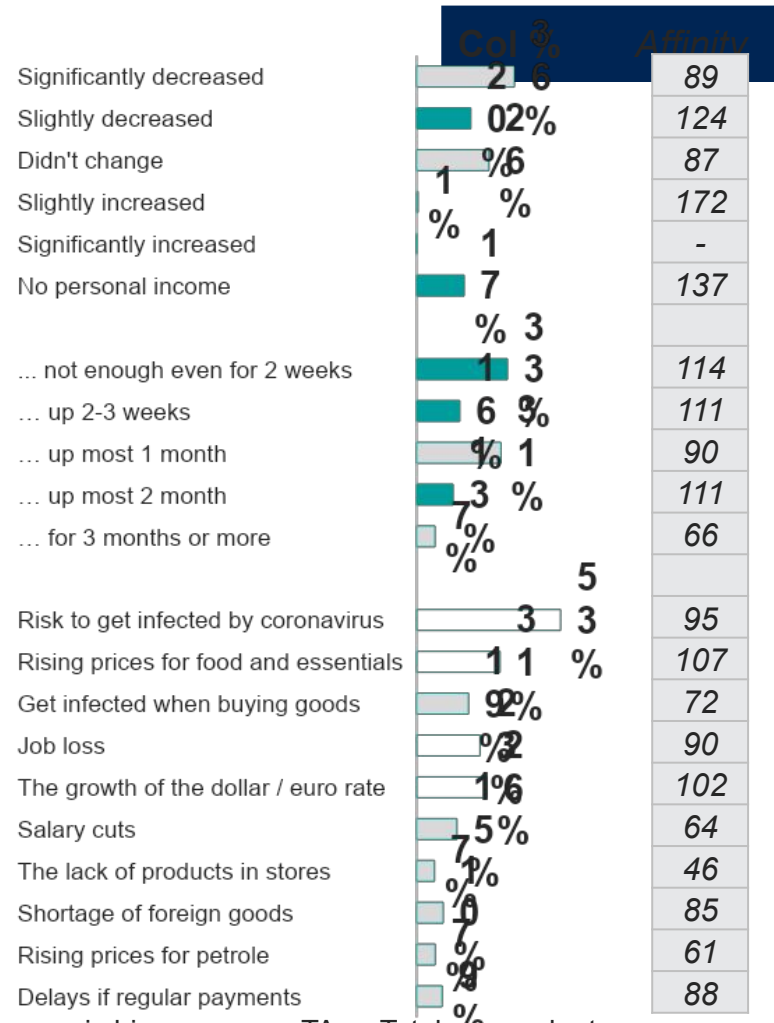
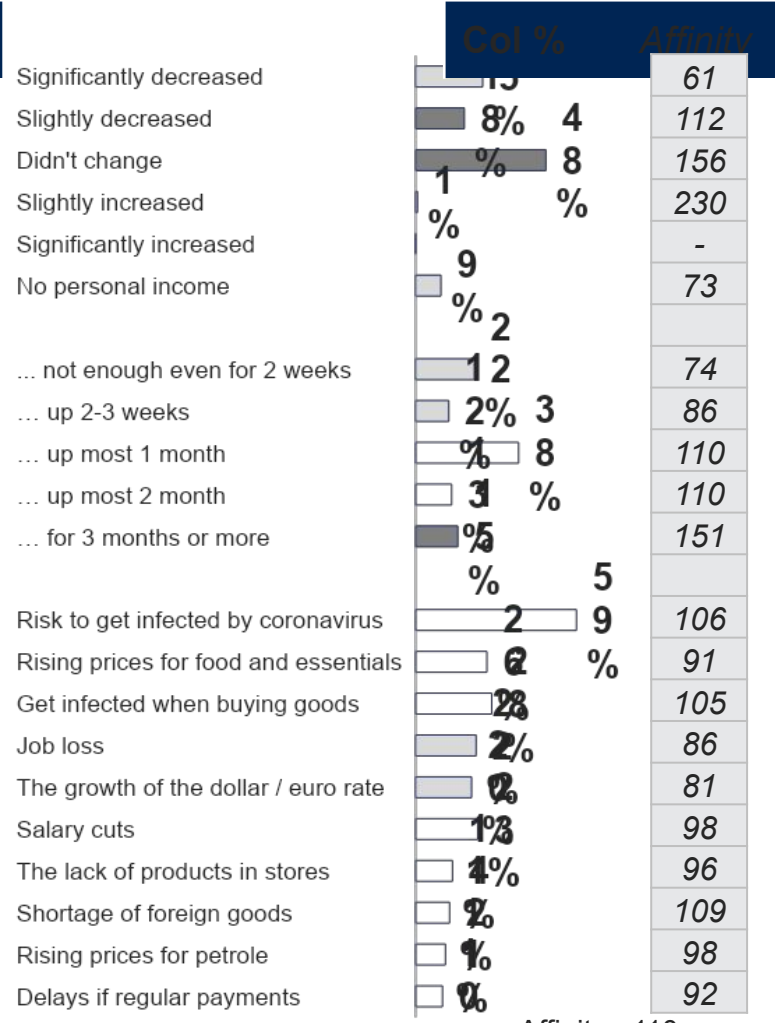
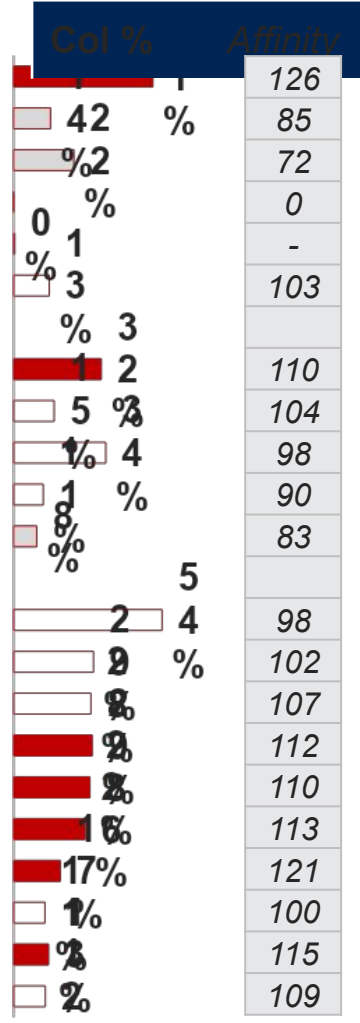
Will improve (much or slightly)

PESSIMISTS 52%

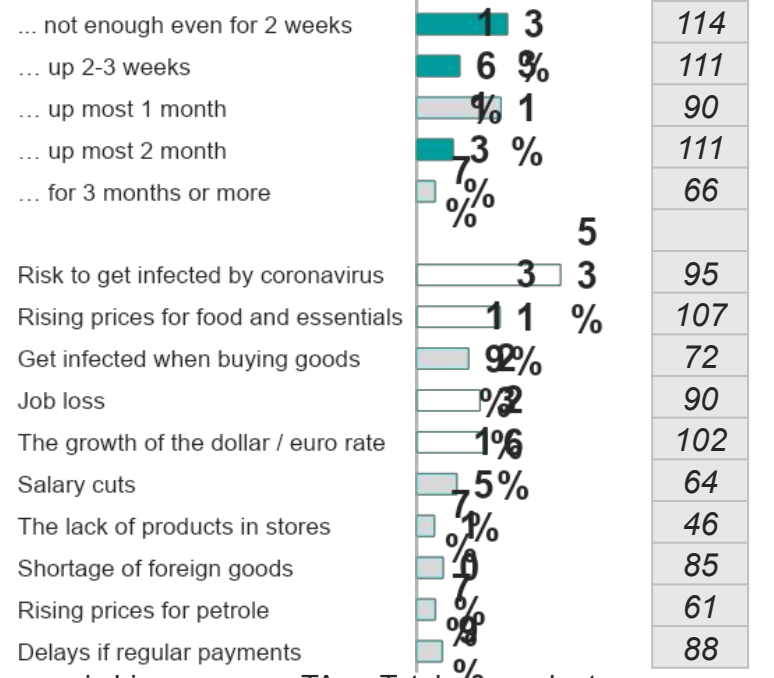
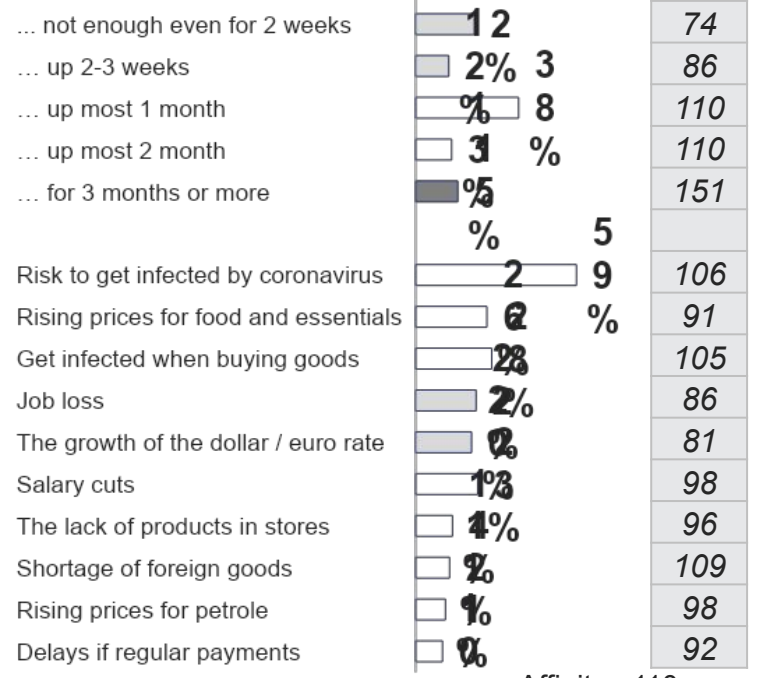
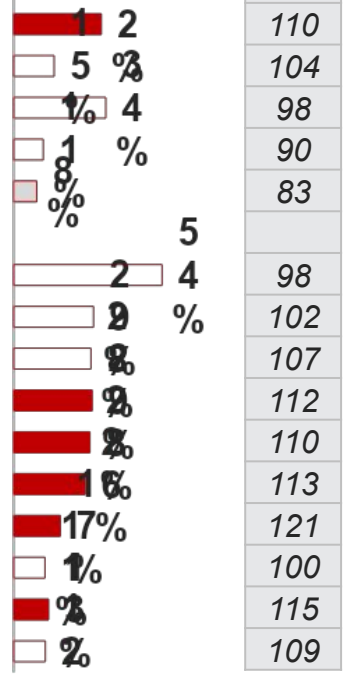
NEUTRALS 30%

OPTIMISTS 18%

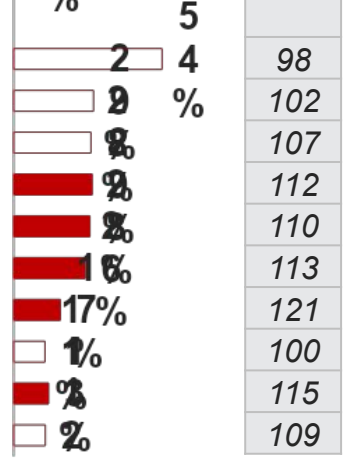
CHANGES IN PERSONAL INCOME



MY SAVINGS ARE ENOUGH TO STAY AT QUARANTINE



TOP-10 SCARES



Affinity >110 means group is bigger among TA vs Total respondents.
Affinity <90 means group is smaller among TA vs Total respondents.



CONFIDENCE TYPOLOGY

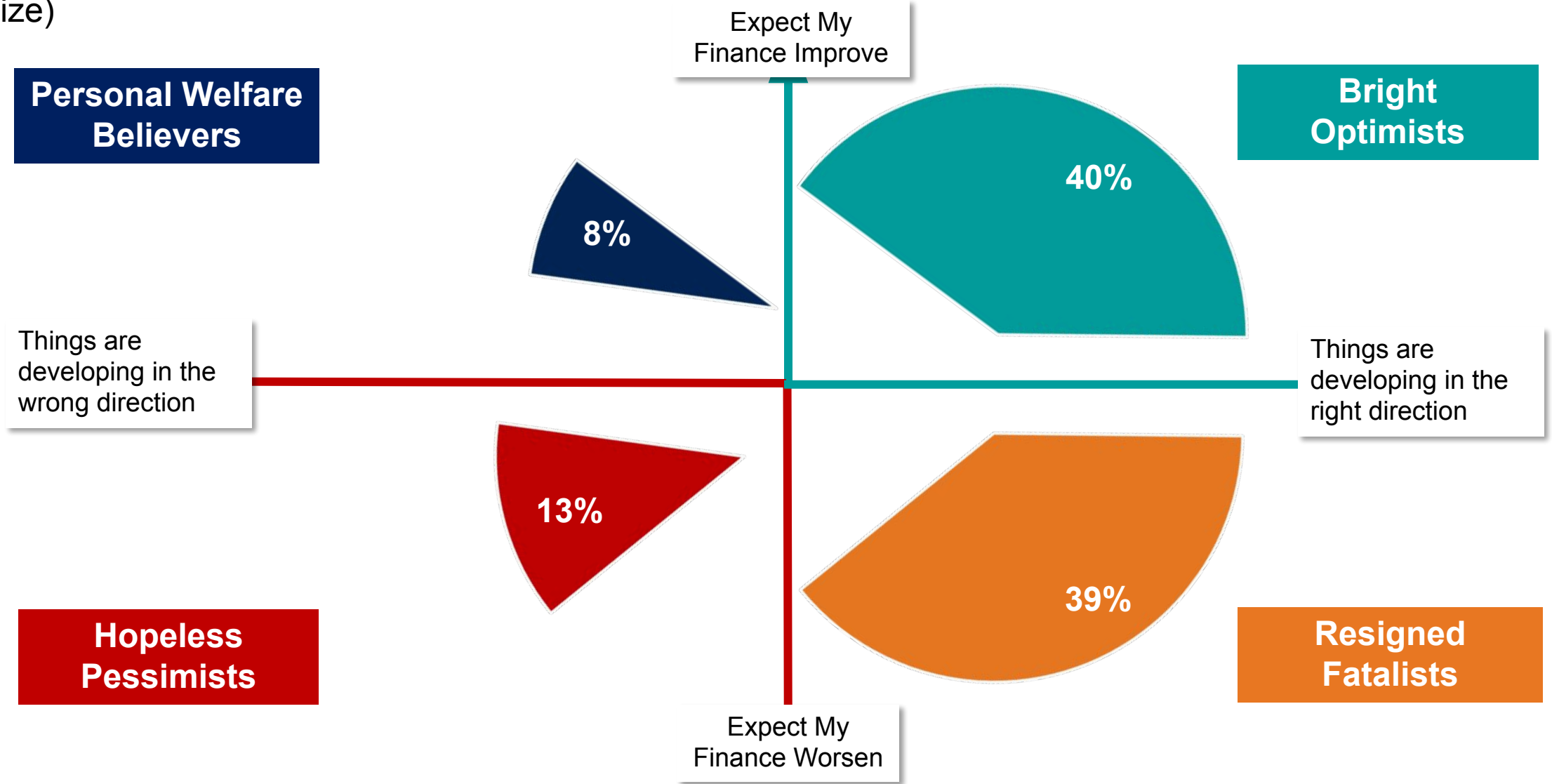
- Social-demographic profile of the segments
- Worries about COVID19

2



CITIZEN CONFIDENCE TYPOLOGY

Bright Optimists and Resigned Fatalists are two major groups among Georgians (of practically the same size)



CITIZEN CONFIDENCE TYPOLOGY

The younger and richer people are, the more confident they are

Bright Optimists

are mostly youth 18-24 with a good current financial situation

Resigned Fatalists

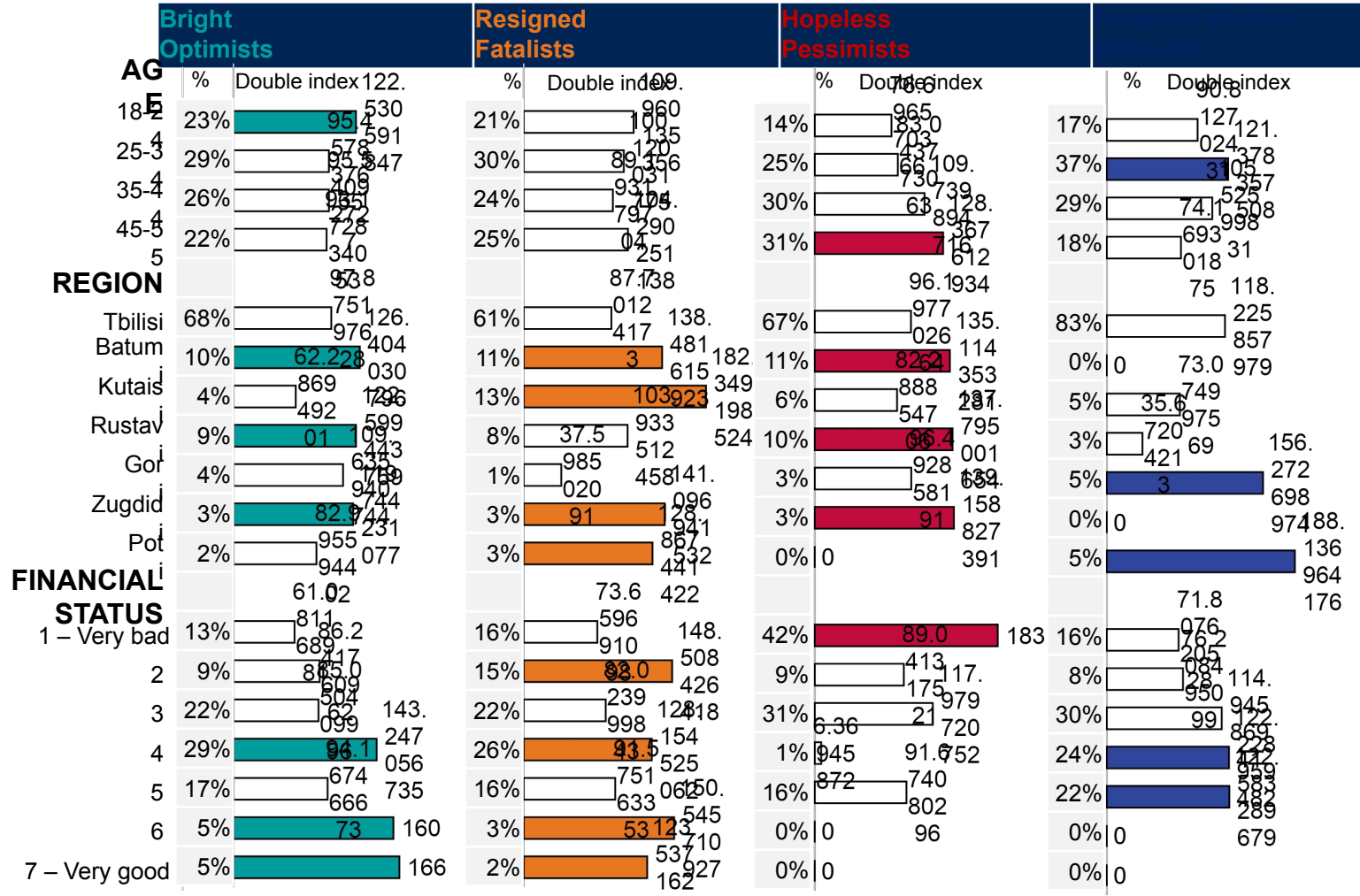
equally distributed between all age groups and have different financial situations

Hopeless Pessimists

are more older people aged 45-55 with a bad current financial situation

Personal Welfare Believers

are youth aged 25-34 with a good current financial situation

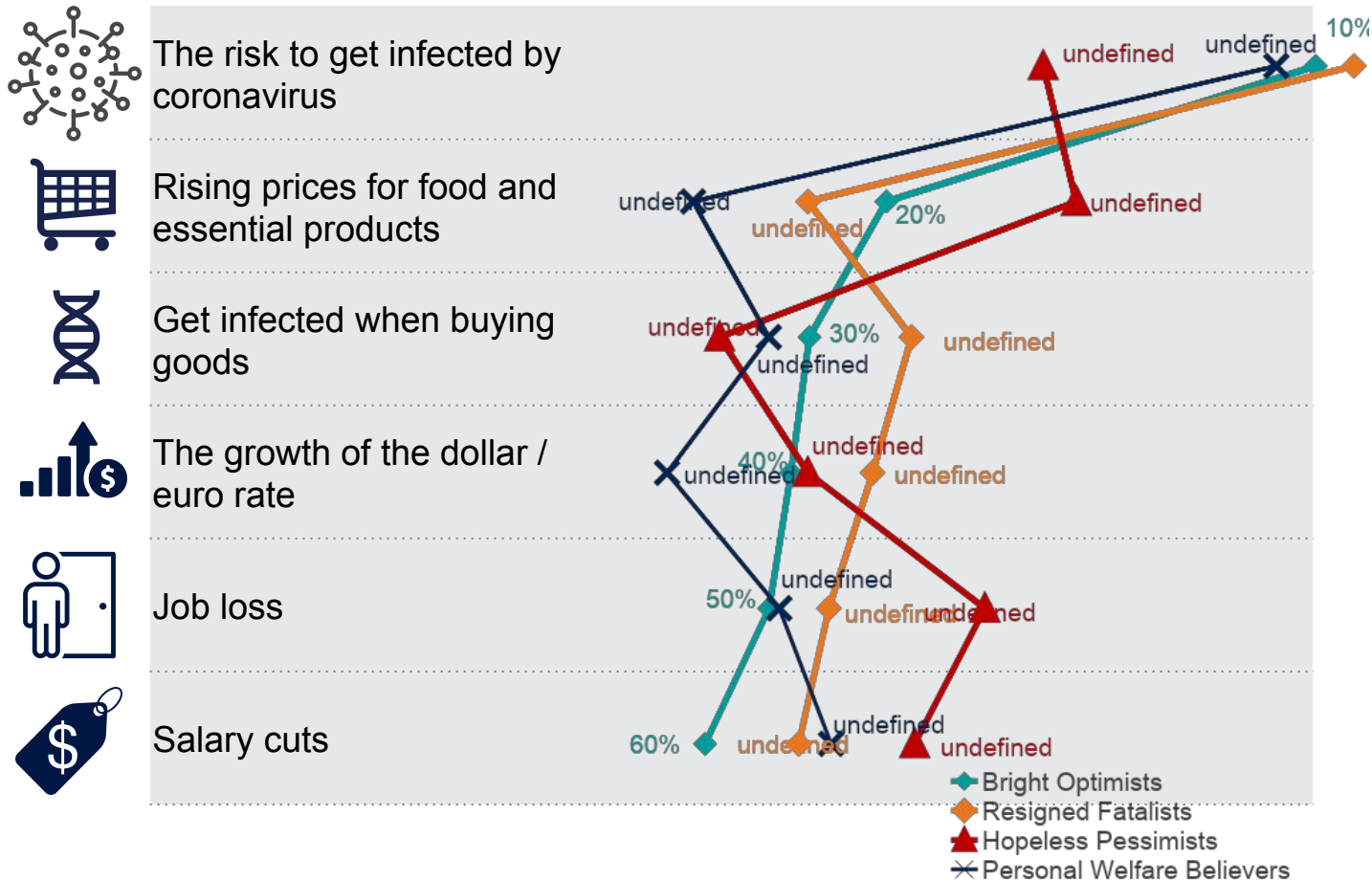


%
 Double index - a measure of the distinctiveness of a segment
 Double index more than 120 means distinction of a segment from total



TOP FEARS RELATED TO COVID-19

Coronavirus is the main fear by a wide margin for all segments except Hopeless Pessimists.



Hopeless Pessimists afraid of financial issues equally with COVID19. These fears are caused by the negative events they have already faced - more than other segments:

- 59%** Their income significantly decreased after quarantine /restrictions
- 27%** Their regular payments are delaying now
- 16%** Of them are on unpaid leave

**BE
SURE.
MOVE
FASTER.**

GAME CHANGERS



**THANK
YOU**

GAME CHANGERS

