TWO IN ONE:
AFFLUENTS
AS ACTIVE CONSUMERS
AND INSPIRED TRENDSETTERS

Data sources

Premier

Premier: upper middle class survey. Analyzing brands, goods and services, oriented to high income consumers.

- Russian cities 1 mln+
- Sample - 2 500 respondents per year
- 18-65 years old, income: Moscow - over 70 thousand rub. p/month; St Petersburg – over 60 thousand rub. p/month; other cities – over 50 thousand rub. p/month
- High socio-economic status (based on SEL)

Read more

RusIndex

RusIndex is a quarterly all-Russia survey of goods and services consumption and media audience.

- Russia's cities with 100,000 + population.
- Sample ~25 000 respondents per year

- Read more

Ipsos

How we define affluents

In the Premier survey

- **High level of income**
  (enough money for buying large appliance and up)
- **Higher education**
- **Owns certain property**
  (car, country house, etc.)
- **Enough money for active living and extra services**
  (visiting restaurants every week, flights, travelling abroad, active leisure in city of living – theatres,, galleries, concerts)

Ipsos

Affluents' portrait in Russia

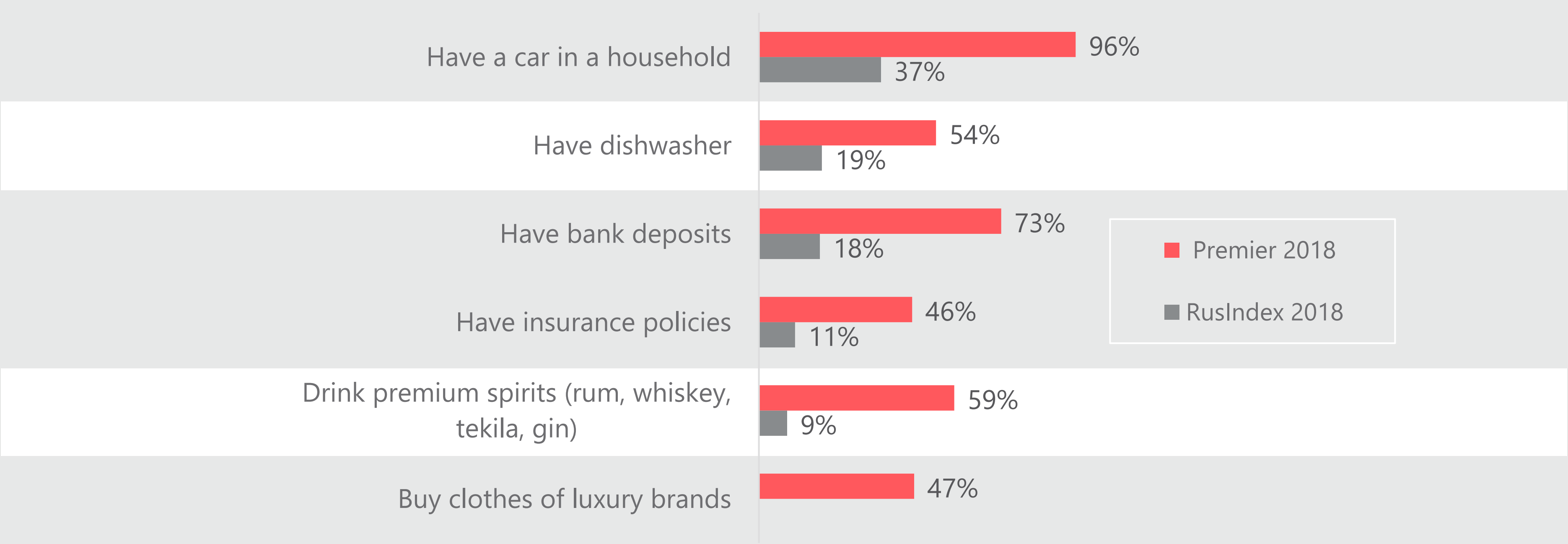
Audience of the Premier survey		Average residents of cities 1 million +, 18-65
95%	Work	73%
76%	Main income receiver	56%
99 624 rub.	Average personal income	38 637 rub.
17%	Individual entrepreneur	7%
35%	Mid level manager	12%
16%	Top manager	4%

Premier' 2018

RusIndex' 2018

Affluents' contribution to economy

significant purchasing power



Source: Ipsos. RusIndex: Russians aged 18-65, cities 1 mln+

Why are they important to us?

NOVATORS

«I buy new goods and products earlier than most of my familiars»

Premier 33% RusIndex* 9%

OPINION LEADERS

Communicative group Word of Mouth: Opinion leadres

All* 17% High income** 21%

Ipsos

*RusIndex: Russians 18-65, cities 1 mln+

** RusIndex. High income = top 10% of population on persona income

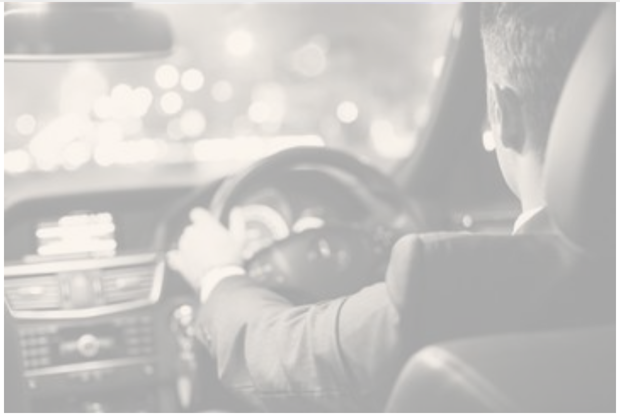
Key trends

Mixing brands and price segments

Expect from brands to be responsible in environmental and ethical issues

Prefer to spend money on experiences over things

Mixing brands and price segments



- Not-demonstrative luxury
- Personality is more valuable than things

Not crazy about luxury cars

68%

One car in a household

. . . 28%

Two ore more cars in a household

TOP-4 car brands
1. Toyota
2. Nissan
3. Ford
4. Volkswagen

Source: Premier'2018

Choose alternative ways of transportation – taxi, carsharing, etc.

«I have sold my car thousand years ago and drive around the city by taxi, subway or car sharing. I go to work on Yandex.Taxi business class. It is much cheaper than auto ownership».

Scooters, segways, gyroscooters, bicycles for rental, as a way to get to the subway station or to move around the city

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Make everyday purchases in mass market retail chains

Source: Premier 2017, 2018. Moscow

Mixing brands and price segments

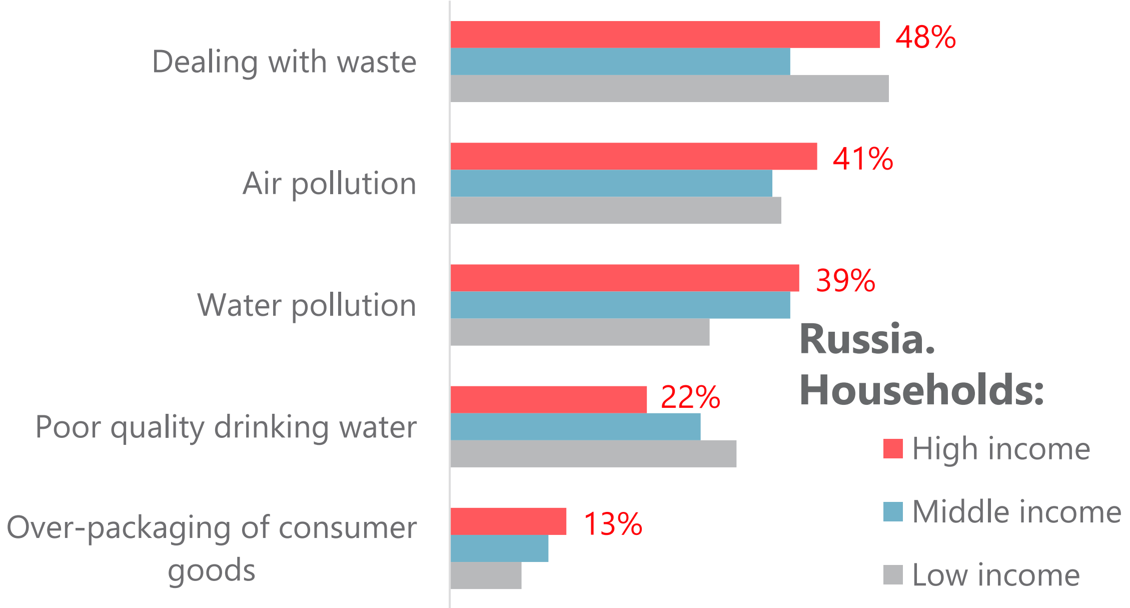
Denial of demonstrative behavior and even condemnation of demonstrativeness:

- The value of quality, naturalness and functionality of things comes to the fore
- Moving towards “affordable luxury” and “budget premium”
- In the center of attention – a person, not what he/she consumes

Expect from brands to be responsible in environmental and ethical issues

The most important environmental issues

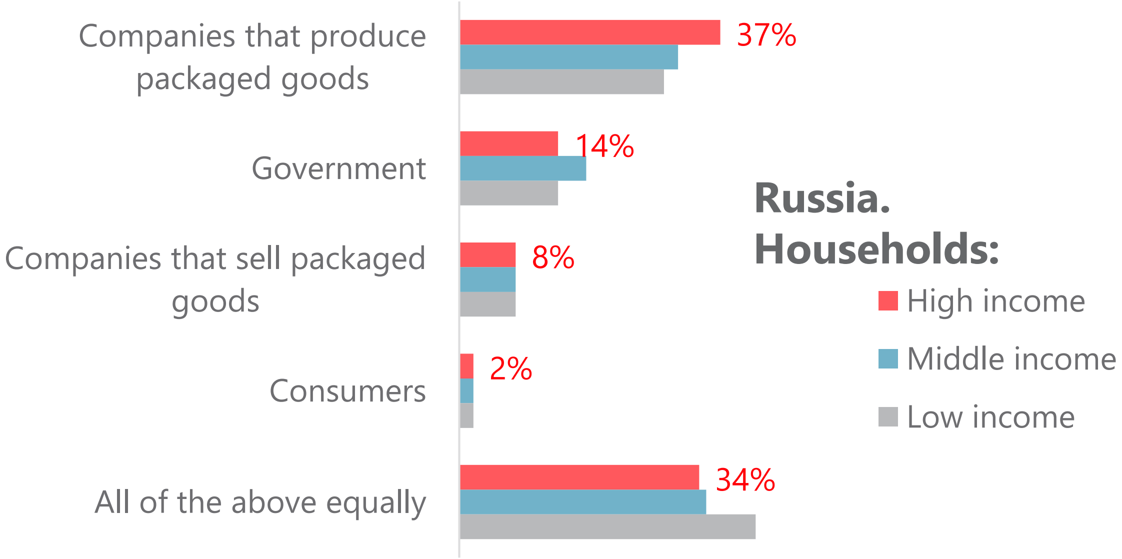
Global	Russia
34%	**46%**
35%	38%
25%	**37%**
13%	**26%**
15%	11%



Source: Ipsos. How does the world perceive our changing environment?
Base: 19,519 online adults aged 16-74. 27 countries. Feb 22 – March 8 2019

Non-Recyclable Product Waste

Global	Russia
20%	**34%**
14%	15%
9%	8%
9%	**2%**
39%	35%

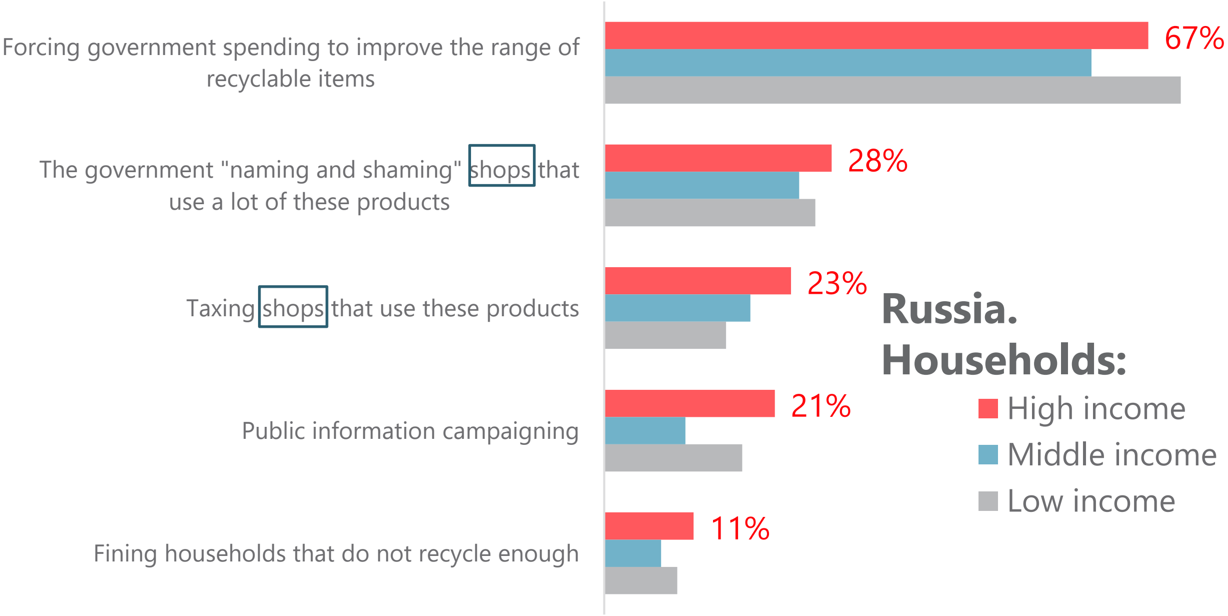


Source: Ipsos. [How does the world perceive our changing environment?]
Base: 19,519 online adults aged 16-74. 27 countries. Feb 22 – March 8 2019
Q: Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold?

Non-Recyclable Product Waste

Global	Russia
46%	**66%**
26%	27%
33%	**20%**
27%	**17%**
24%	**9%**

What kind of policy action should be taken?

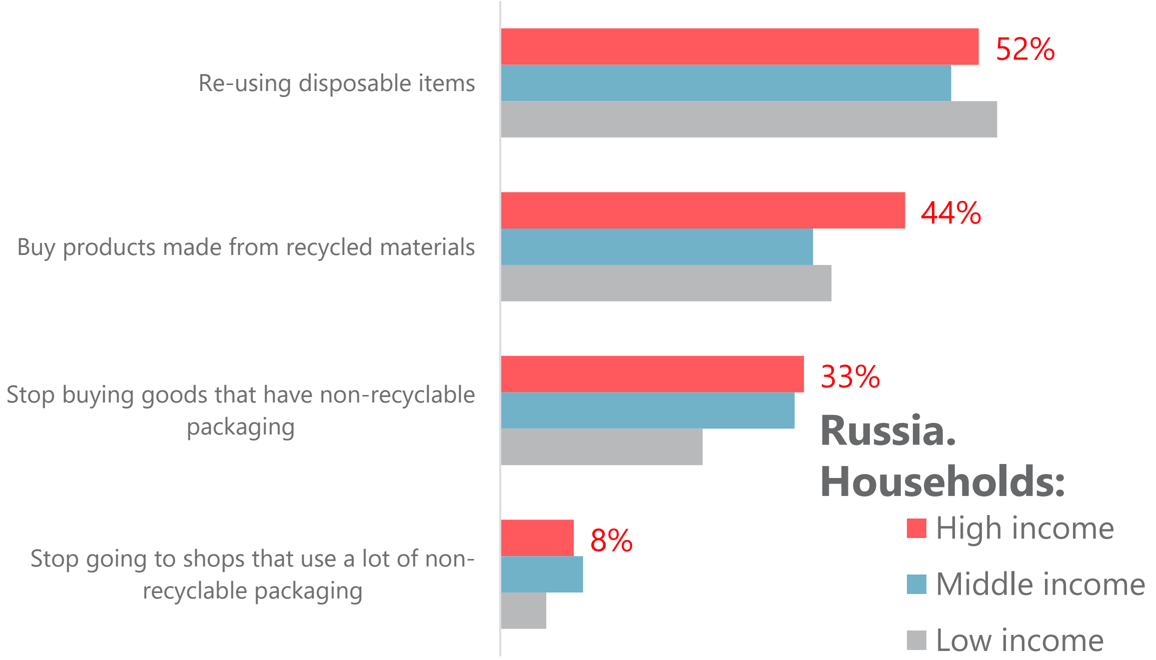


Source: Ipsos. [How does the world perceive our changing environment?]
Base: 19,519 online adults aged 16-74. 27 countries. Feb 22 – March 8 2019

Non-Recyclable Product Waste

Global	Russia
56%	51%
51%	**40%**
38%	**31%**
20%	**7%**

What personal actions are citizens taking?



Source: Ipsos. [How does the world perceive our changing environment?]
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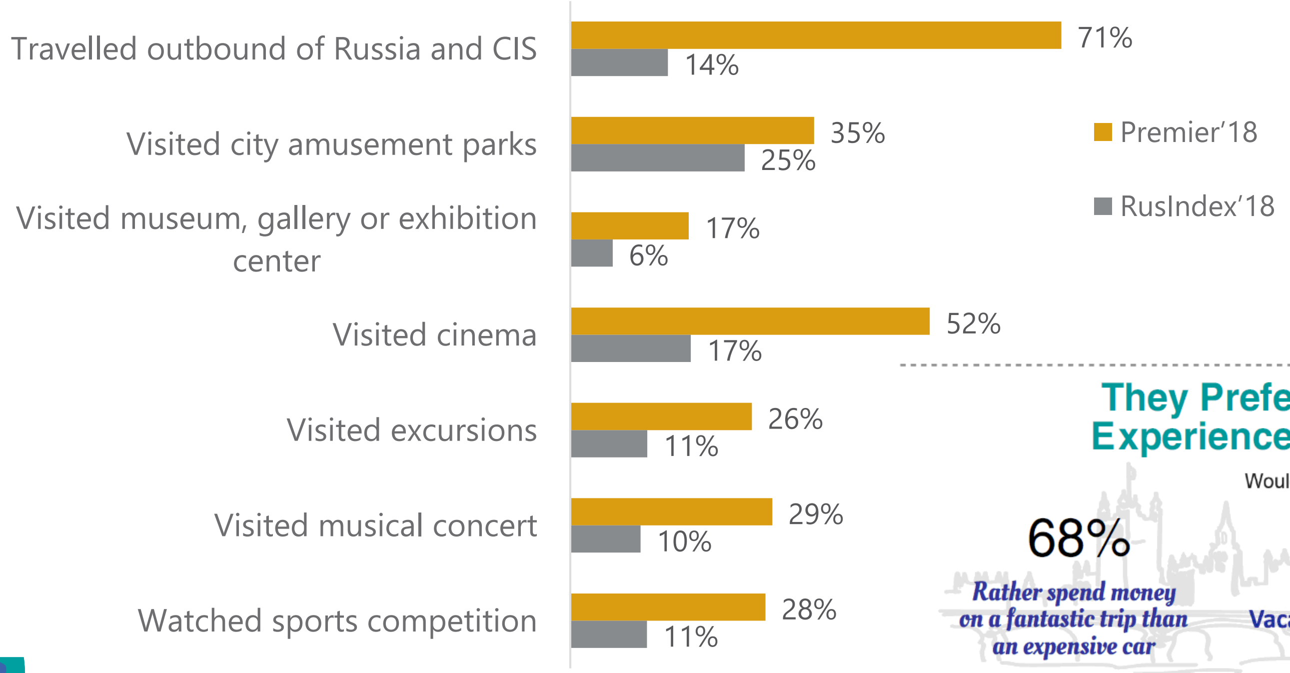
Expect from brands to be responsible in environmental and ethical issues

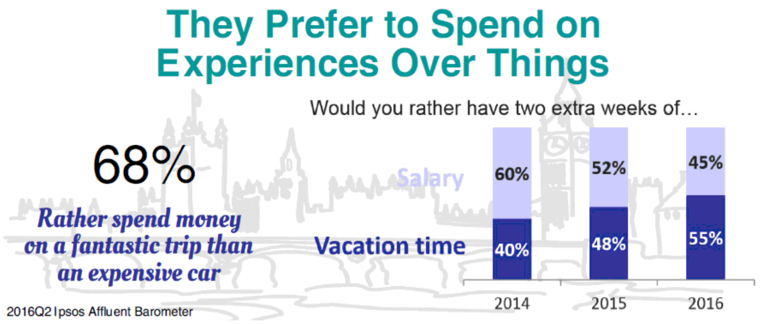
Ready to change themselves, but are waiting for proactivity in socially active behavior:

- primarily from manufacturers of goods and from services providers,
- secondly – from retailers
- and only in last place is the responsibility of the consumers themselves.

Prefer to spend money on experiences over things

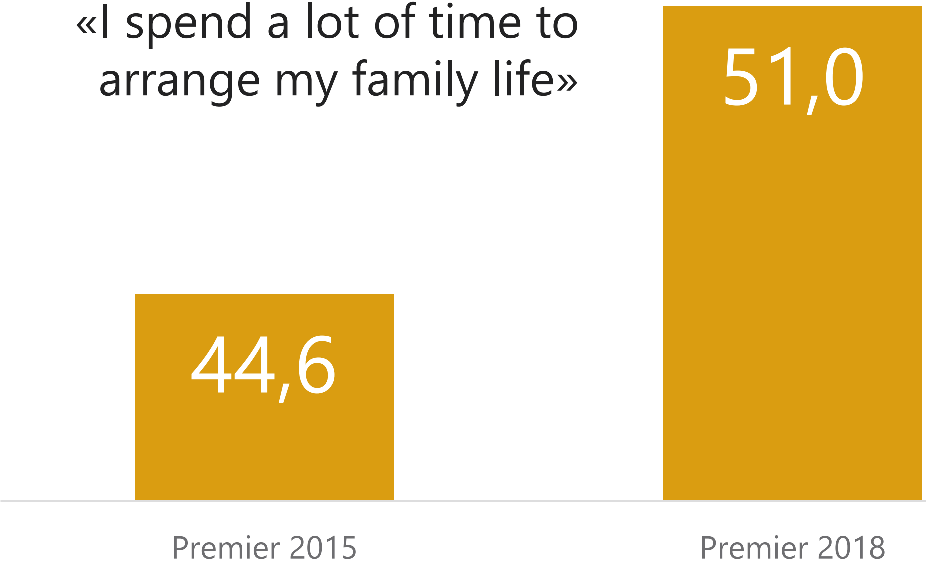
Prefer to spend money on experiences over things





Work-family balance

«I spend a lot of time to arrange my family life»



Prefer to spend money on experiences over things

What does the affluent consumer look for today?

- Comfort, service, style, design, convenience
- Humor, emotions, stories, legends, True Stories, the idea of freedom
- Communicating with family and friends, including offline
- Connecting goods with positive emotions and impressions, interactivity and extension of the experience after purchase

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Media consumption

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The Internet is the main media channel for the upper segment of the middle class.

97% of the Premier audience use Internet daily

Hours spent per day online

TOP most visited sites
Vkontakte.ru / Vk.com
Youtube.com
Facebook
Instagram

Active communicators
Social media
Blogs, micro blogs (LJ, Twitter, etc.)
Web messangers (ICQ, Skype, Viber, etc.)
Forums

Source: Premier' 2018

Comprehensive analysis of the target audience

Features Premier. Targeted marketing

Media preferences,
Attitude to ads

Family, work,
social environment

Personality,
motivation

Consumer
behavior

Lifestyle,
leisure activities

Financial behavior

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Search for effective communication channels

Solvable tasks

INTERNET	TELEVISION	RADIO	PRESS

ADDITIONAL COMMUNICATION CHANNELS

OUTDOOR
(train stations, airports, etc.)

INDOOR
(cinema, leisure places)

TRANSPORT
(subway, urban ground transportation)

New data of the Premier'2019 survey

Questions?

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GAME CHANGERS

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