MARKET ASSESSMENT AND MONITORING

PRELIMINARY FINDINGS OF RETAILER AND CUSTOMER SURVEYS

UNHCR

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Methodology

CUSTOMER SURVEY

PURPOSE OF THE STUDY: To provide a customer's perspective to the exercise on the functionality of marketplaces, observations on the prices.

SAMPLE: 191 respondents - 108 refugees from Ukraine and 83 RM citizens

SAMPLING TECHNIQUE: proportional stratified probabilistic sample

RESPONDENTS: retail customers aged 18+

GEOGRAPHY: Right and Left Banks

METHOD: Face-to-face TAPI (Tablet Assisted Personal Interview) method for the Right Bank data collection; CATI (Computer Assisted Telephone Interview) method of Left Bank data collection

MARGIN OF ERROR: +-11 at 95% confidence level

The data presented for the Customer Survey has been weighted by geographical criterion.

Methodology

RETAILER SURVEY

PURPOSE OF THE STUDY: To gain a better understanding on how the different markets operate, to assess the commodity prices, accessibility to the market and the market capacities to response increasing demand.

SAMPLE: 46 retailers (markets, open markets, supermarkets, non-food items shops)

RESPONDENTS: Trader representative responsible for the purchase or has a role in decision-making

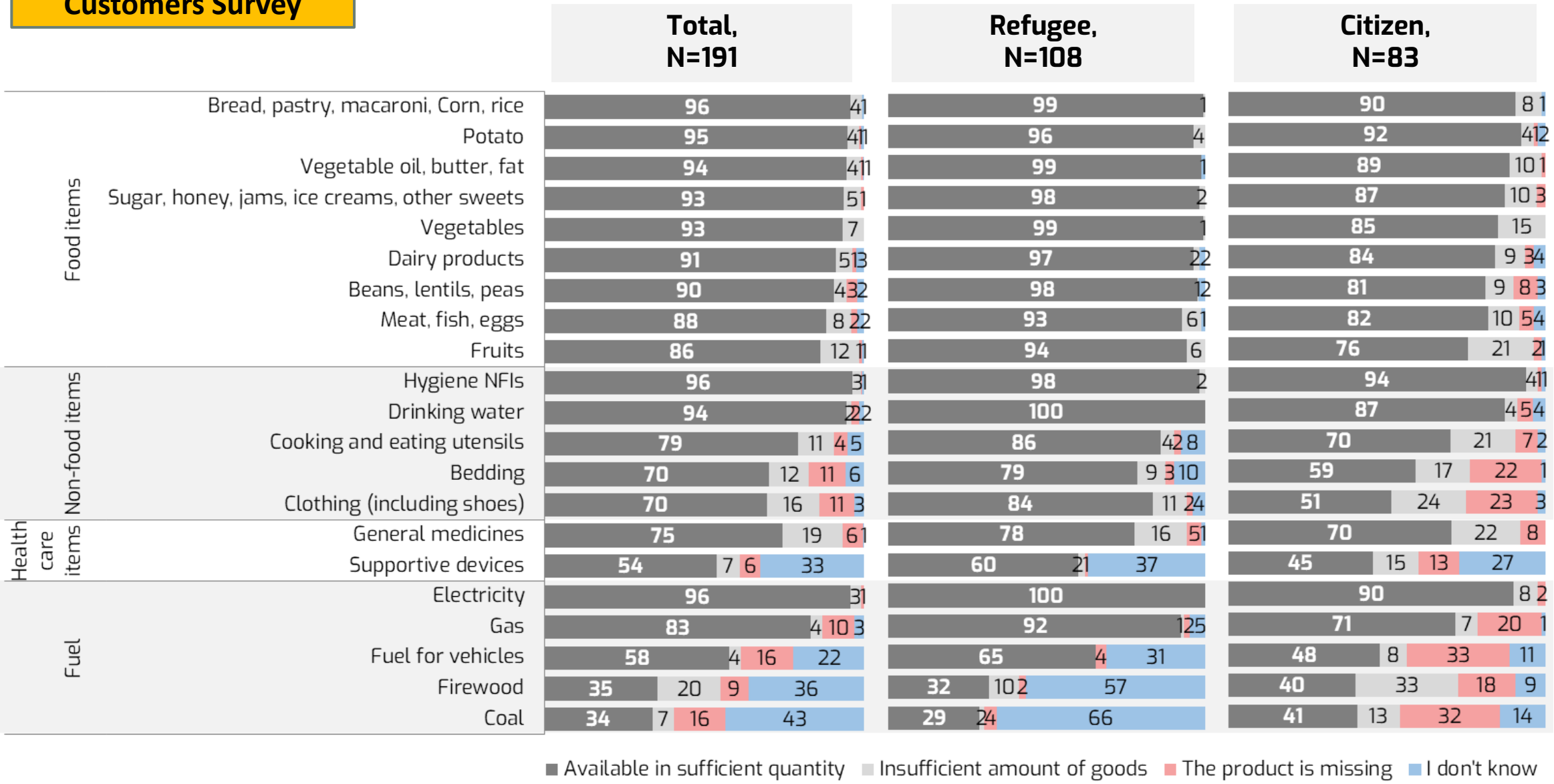
GEOGRAPHY: National (Right Bank of r.Nistru)

METHOD: Face-to-face TAPI (Tablet Assisted Personal Interview) method

Availability of products and product prices

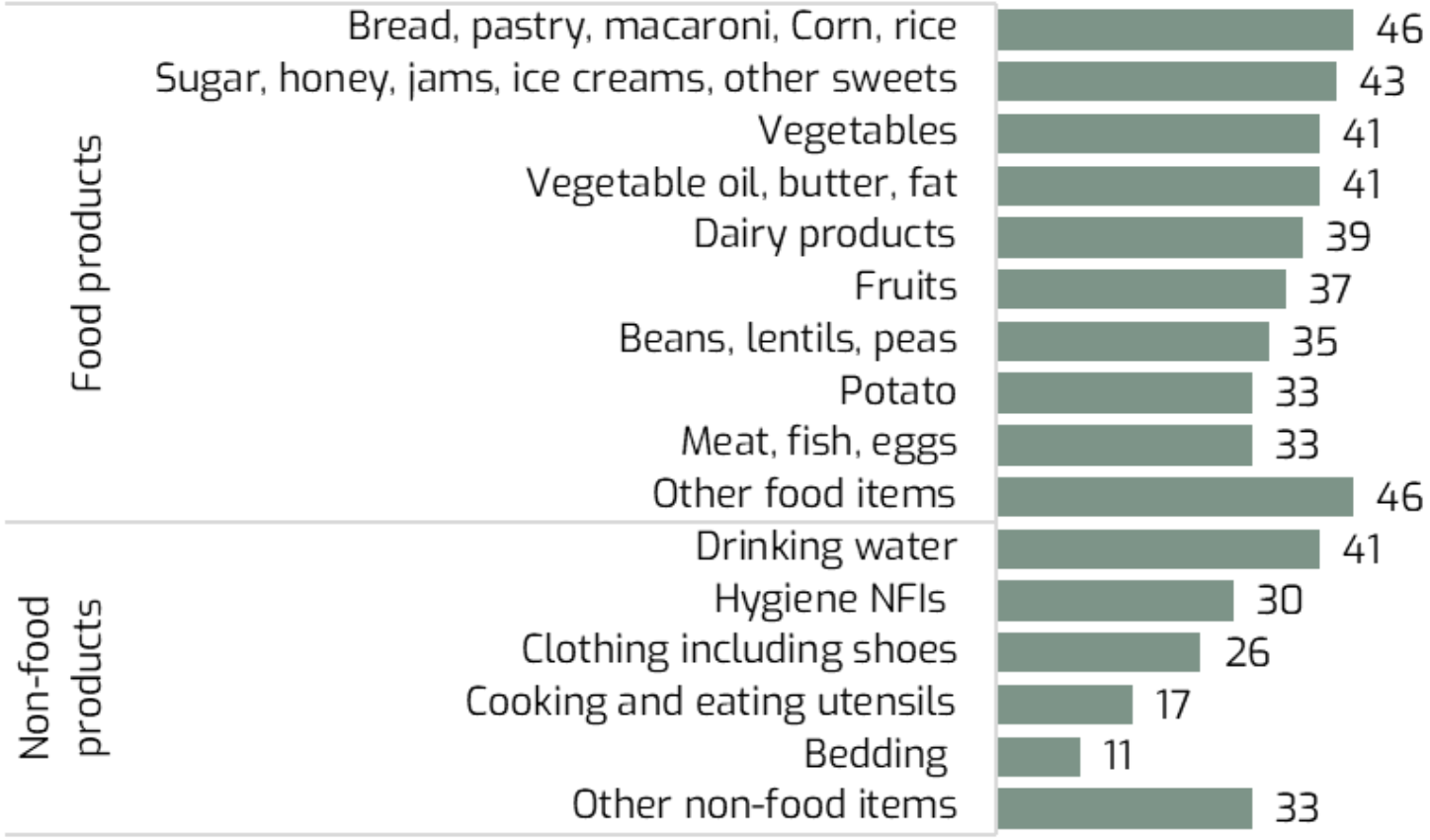
Q2.1. Please indicate the current level of availability in stores and markets in your community/region for each of the following. (one answer per row), %

Customers Survey



Q2.1. In your shop, what do you normally sell? (multiple answer), N=46, %

Retailer Survey

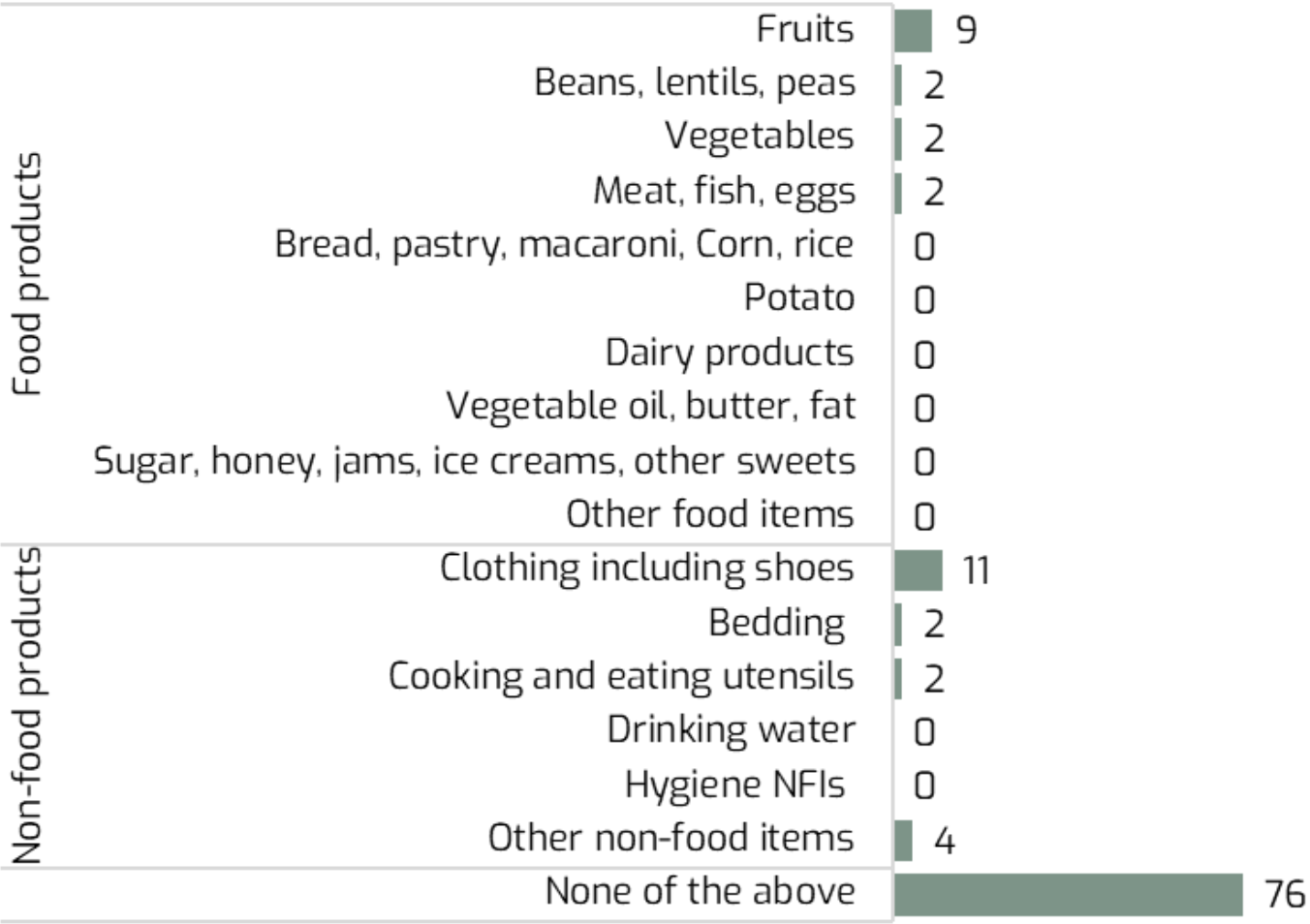


The top foods sold in most of the surveyed stores are: bakery products, pasta, rice, etc. (46%), sweets (43%), vegetables (41%) and vegetable oil, butter (41%).

As for non-food products that are usually sold in the shops in the sample, the top-3 are: drinking water (41%), hygiene products (30%), clothing and footwear (26%).

Q2.2. Are there any products that are currently scarce in your shop? (multiple answer) N=46, %

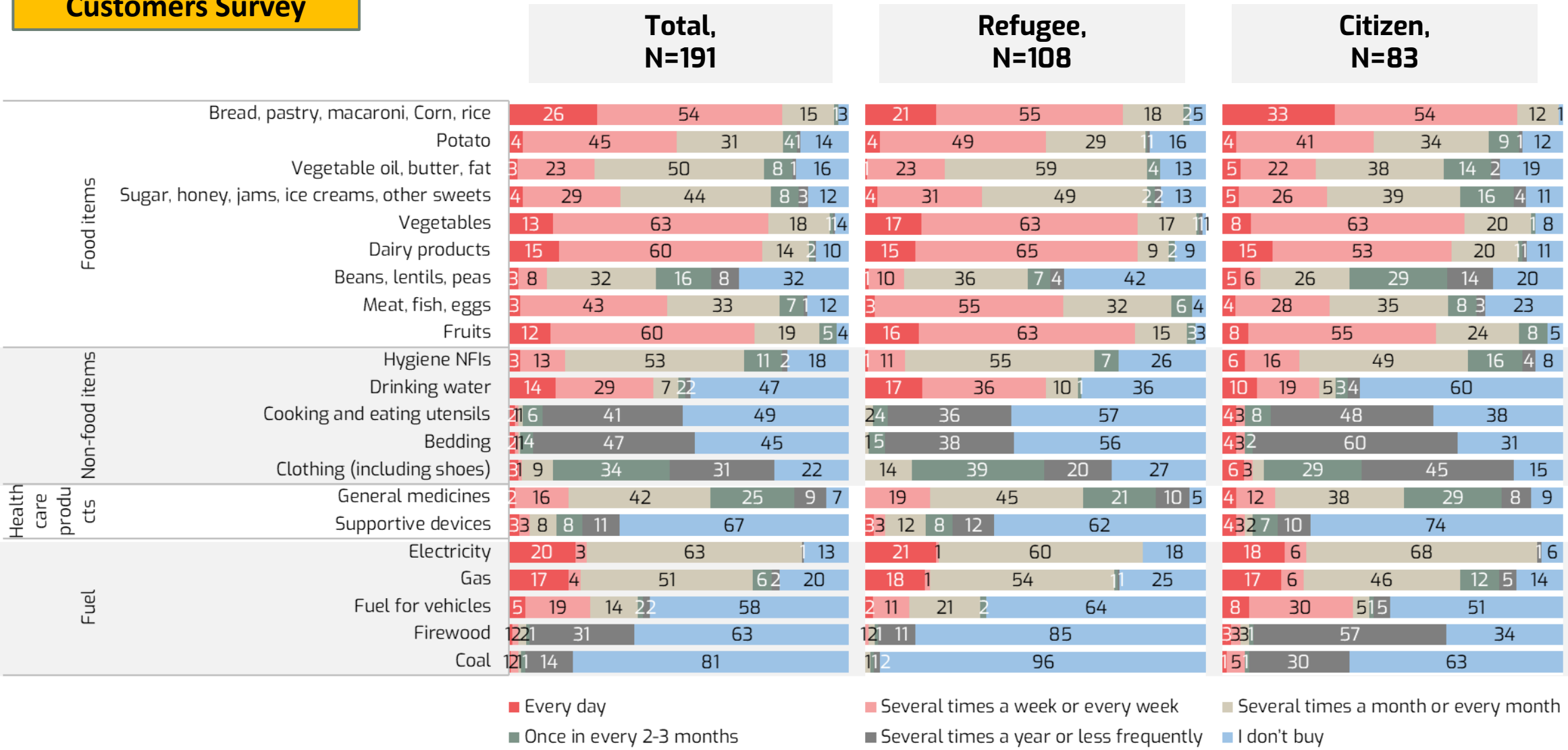
Retailer Survey



The majority of the retailers included in the survey do not have a shortage of any of the products on the list proposed (76%).

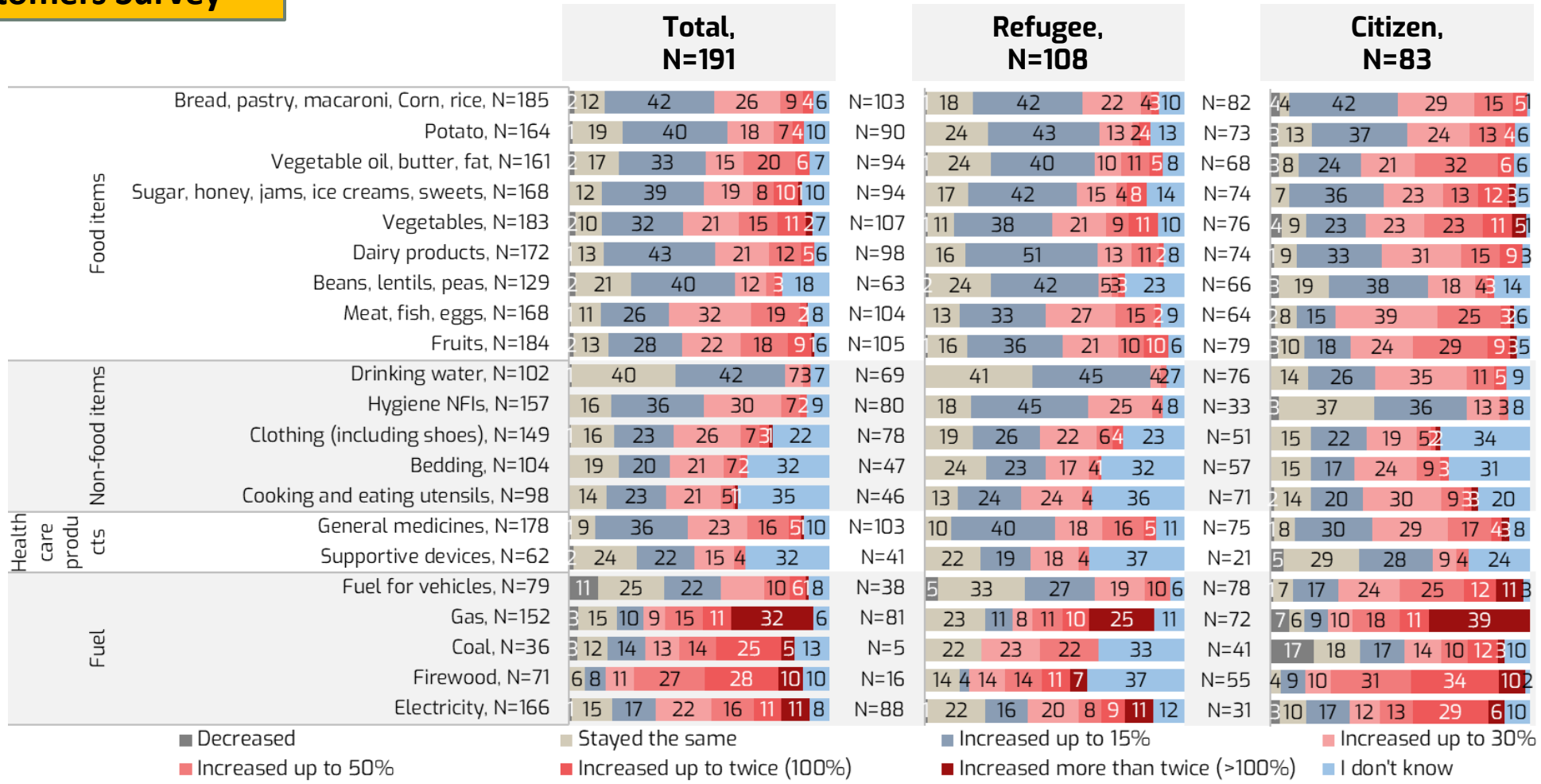
Q2.2. How regularly are you buying these items? (one answer per row), %

Customers Survey



Q2.3. How has the current price changed for the items you buy compared to the same period last year? (one answer per row), %

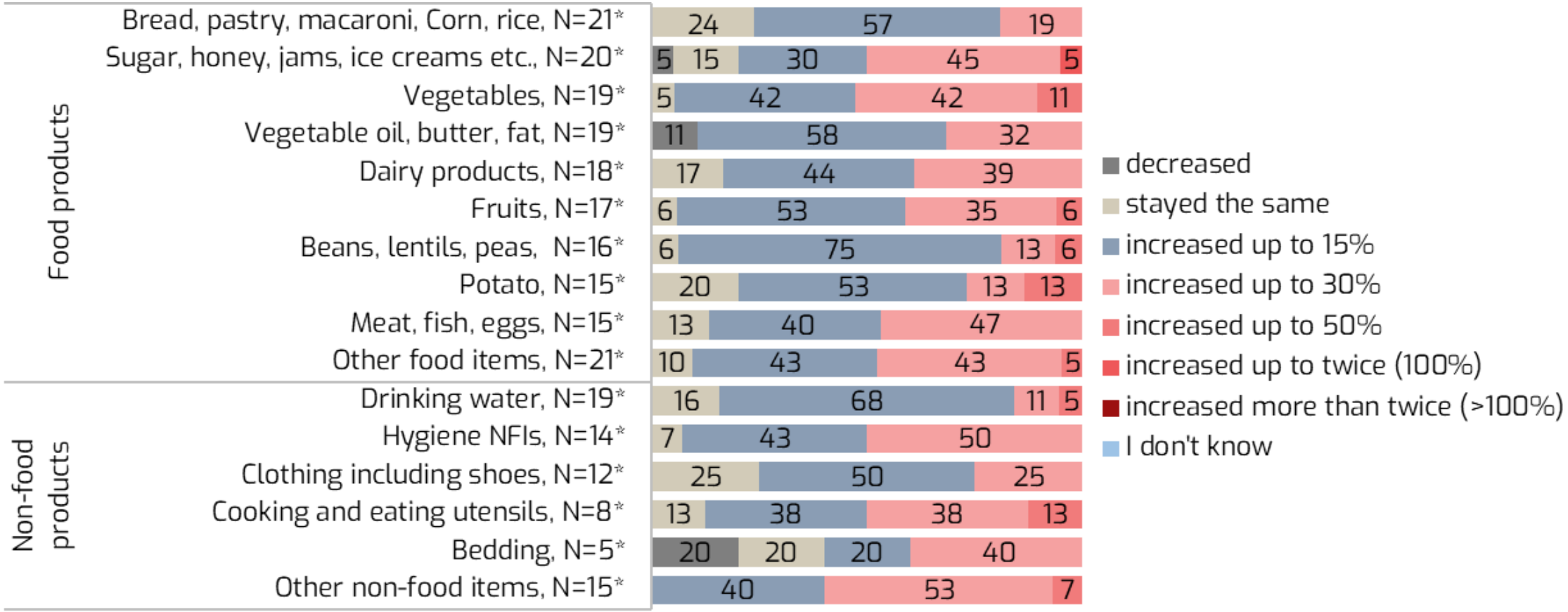
Customers Survey



Surveyed customers indicated that, for the majority of the items analysed, the prices have increased compared to the same period last year.

Q2.5. What is the current retail price level change for….(one answer per row), %

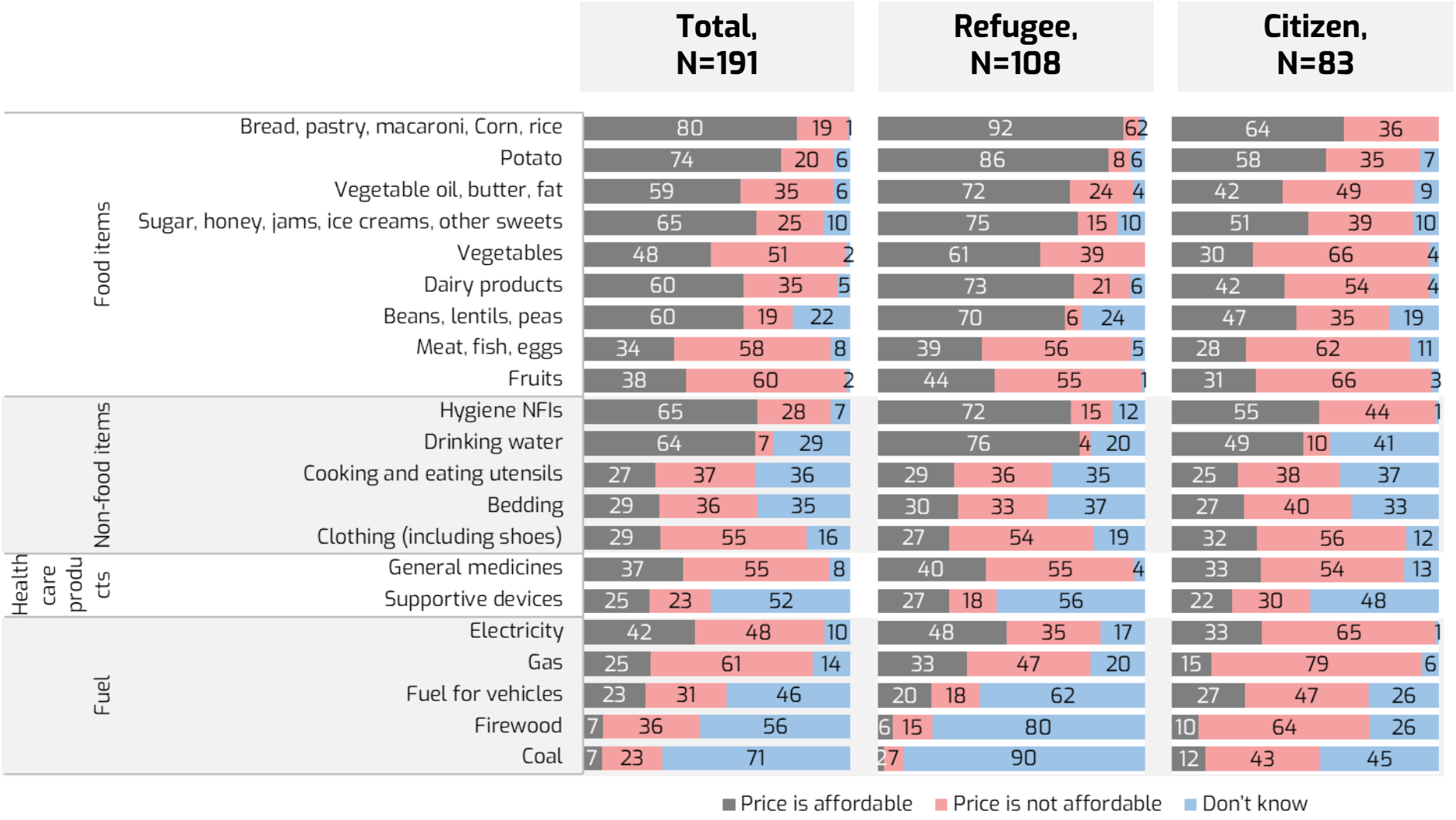
Retailer Survey



In most cases, interviewed retailers mentioned that prices for the products they sell have increased by up to 15%.

Q2.4. Please assess the how affordable are the items? (one answer per row), %

Customers Survey



In general, the majority of interviewed customers find the price of food items to be affordable. However, when it comes to food such as meat, fish, eggs, fruits, and vegetables, at least half of respondents said the price is not affordable.

Q2.5.1. What is the current price for the following items? Please evaluate the cheapest available products of this type. (Food items) (one answer per row), MDL

Customers Survey

Products	Median		
	Total, N=191	Refugee, N=108	Citizen, N=83
Food items			
Bread, 1 unit	7	7	7
Macaroni, 1 kg	23	25	23
Corn, 1 kg	15	15	15
Rice, 1 kg	26	25	26
Buckwheat, 1 kg	30	32	28
Wheat flour, 1 kg	16	15	18
Beans, 1 kg	30	30	30
Peas, 1 kg	17	18	16
Cucumbers, 1 kg	40	40	40
Cabbage, 1 kg	20	20	20
Carrots, 1 kg	18	20	16
Tomatoes, 1 kg	40	45	40
Onions, 1 kg	22	23	21
Apples, 1 kg	13	13	14
Bananas, 1 kg	36	36	38
Oranges, 1 kg	35	35	35
Beef, 1 kg	130	140	114
Chicken, 1 kg	80	80	85
Fish, 1 kg	75	78	70
Eggs, 10 units	27	28	25
Milk, 1 l	18	20	18
Cheese, 1 kg	158	180	145
Sunflower oil, 1 l	35	35	35
Butter, 200 g	40	40	40
Sugar, 1 kg	24	24	24

For most of the food items, the surveyed customers mentioned similar prices. However, notable differences were observed for more expensive items within the range. Specifically, when it came to 1 kg of cheese, refugees stated a minimum price of 180, whereas Moldovan citizens reported it to be around 145.

Q2.5.2. What is the current price for the following items? Please evaluate the cheapest available products of this type. (Non-food items) (one answer per row), MDL

Customers Survey

Products	Median		
	Total, N=191	Refugee, N=108	Citizen, N=83
Non-food items			
Drinking water, 1.5 l	12	12	13
Toilet paper, 1 unit	7	7	7
Toothbrush, 1 unit	25	24	30
Toothpaste, 1 unit	42	36	50
Laundry Soap, 1 kg price	50	50	50
Liquid dish detergent, 500 ml	30	30	32
Sanitary napkins, 10 units	32	30	35
Soap, 500 ml price	40	42	38
Jeans, 1 unit	462	450	500
Shirt, 1 unit	300	280	380
Sweater, 1 unit	380	300	400
Socks, 1 pair	20	20	20
Underwear, 1 unit	55	50	60
Jacket, 1 unit	700	700	800
Winter coat, 1 unit	1500	1400	1700
Boots, 1 pair	1000	800	1000
Sneakers, 1 pair	500	550	500
Bedlinens, 1 set	500	500	500
Pillow, 1 unit	200	200	200
Blanket, 1 unit	400	400	380
Cup, 1 unit	25	25	25
Plate, 1 unit	28	28	25
Spoon, 1 unit	16	15	18
Cooking knife, 1 unit	40	50	35
Frying pan, 1 unit	300	300	350
Pot, 1 unit	350	300	400
Antiinflamatory medicine, 1 pack	80	80	80
Alcohol solution, 500 ml	30	30	30
Eyeglasses, 1 unit	500	500	450

In general, Moldovan citizens tend to indicate higher minimum prices for non-food items compared to refugees.

Q2.5.3. What is the current price for the following items? Please evaluate the cheapest available products of this type. (Fuel) (one answer per row), MDL

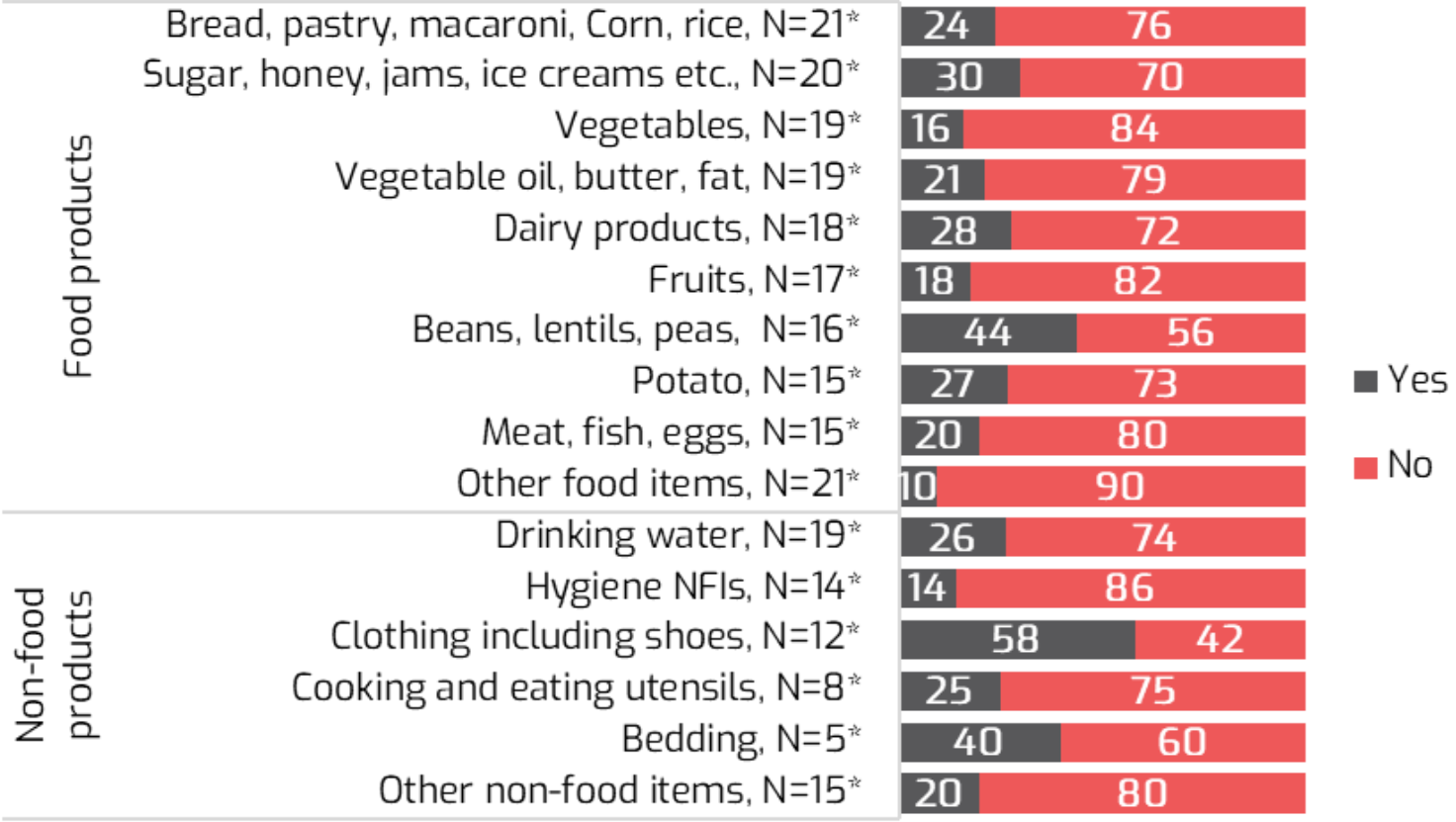
Customers Survey

Products	Median		
	Total, N=191	Refugee, N=108	Citizen, N=83
Fuel			
Gasoline, 1 l	25	25	24
Diesel, 1 l	20	25	20
Gas, 1 m3	28	29	28
Coal, 1 kg	20	120	12
Firewood, 1 m3	1400	1200	1400
Electricity, 1 kW	3	3	3

In general, Moldovan citizens tend to indicate higher minimum prices for non-food items compared to refugees.

Q2.6.1. If we ask you what the price will be in a week from now, would you get it right for...(one answer per row), %

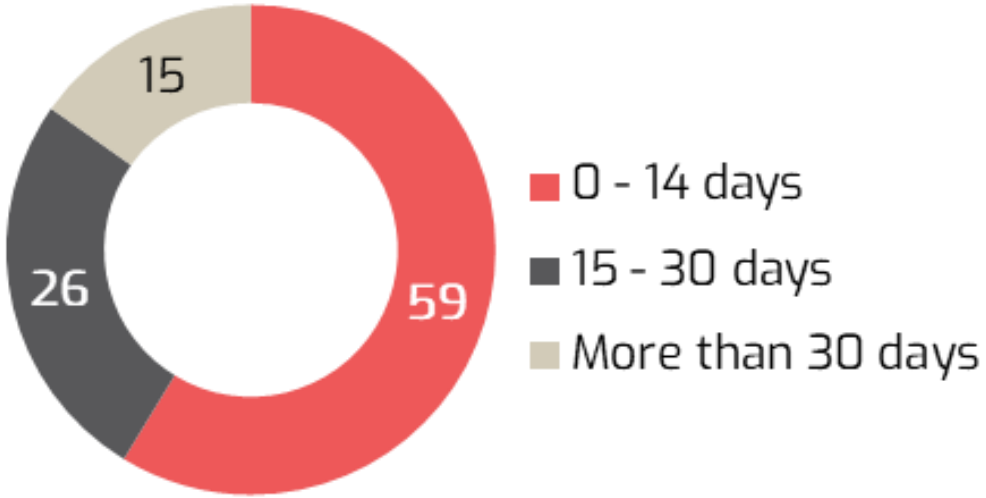
Retailer Survey



More than half of interviewed retailers that sell clothing and footwear say they can estimate what the price of these items will be in a week's time. However, a large proportion of sellers of the selected items cannot accurately estimate their price in a week's time, especially for fruit.

Q4.1. Considering your customers' current demand, for how many days would your current stocks last?, (one answer), N=46, %

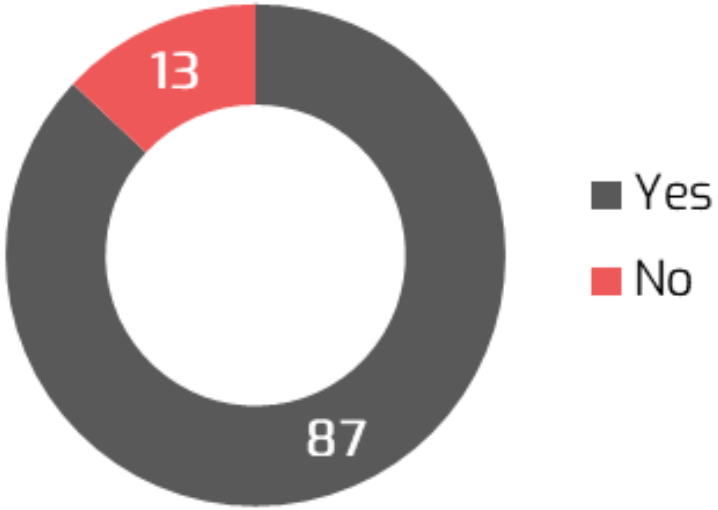
Retailer Survey



More than half of retailers mention that considering the customers' current demand, the current stocks would last for up to 14 days (59%).

Q4.2. If you place an order today, do you expect to receive your products within a week?, (one answer), N=46, %

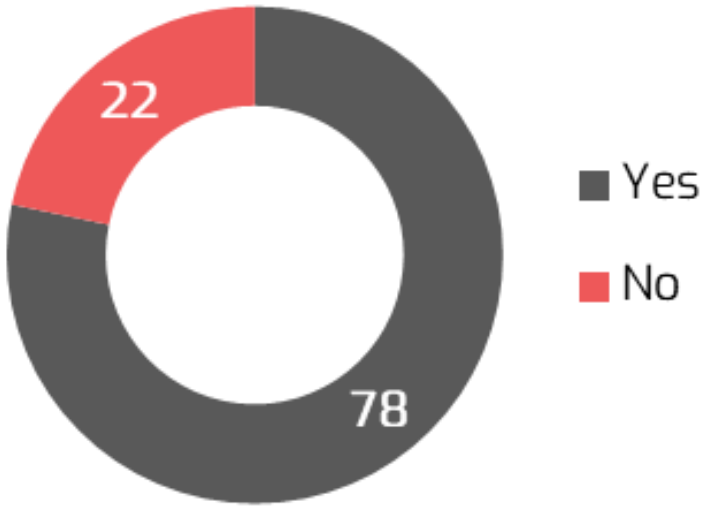
Retailer Survey



87% of retailer respondents indicate that they would expect to receive the products within a week when placing an order.

Q4.3. Are most of your suppliers geographically located in the same place?, (one answer), N=46, %

Retailer Survey

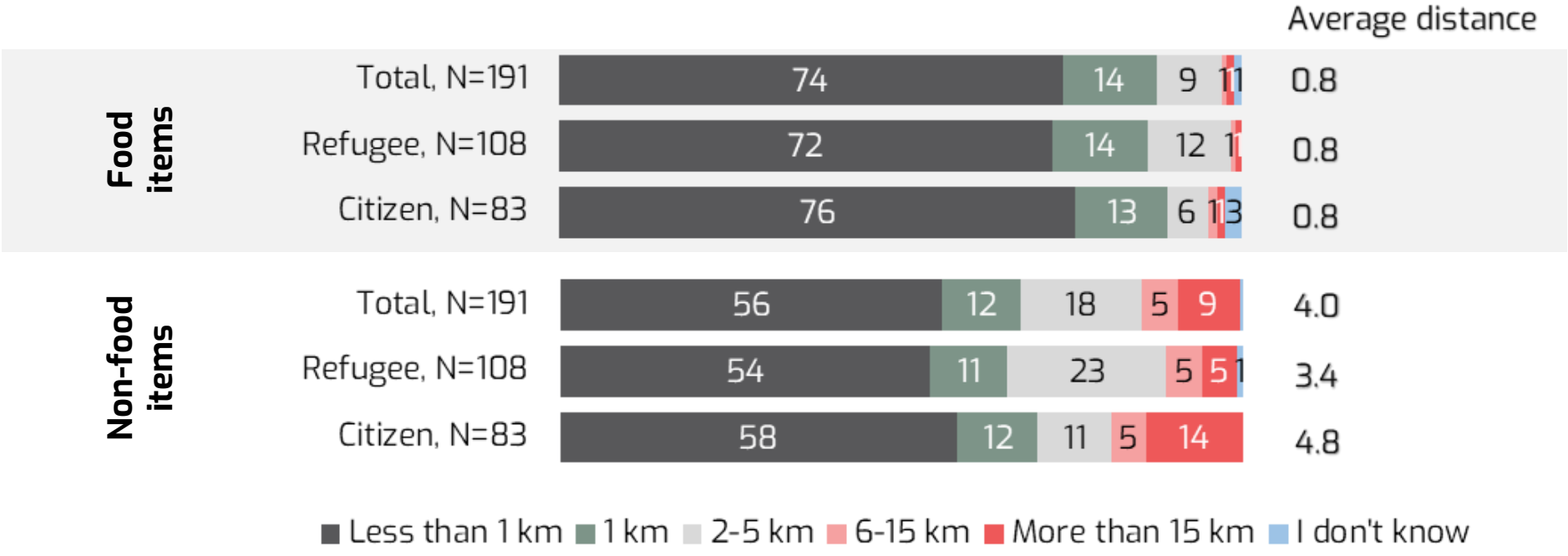


78% of interviewed retailers specify that the majority of suppliers are located geographically in the same place.

Accessibility of markets, products and services

Q3.1. How far away is the nearest market where you normally buy food items is located? / Q3.4. How far away is the nearest market where you normally buy non-food items is located? (one answer), %

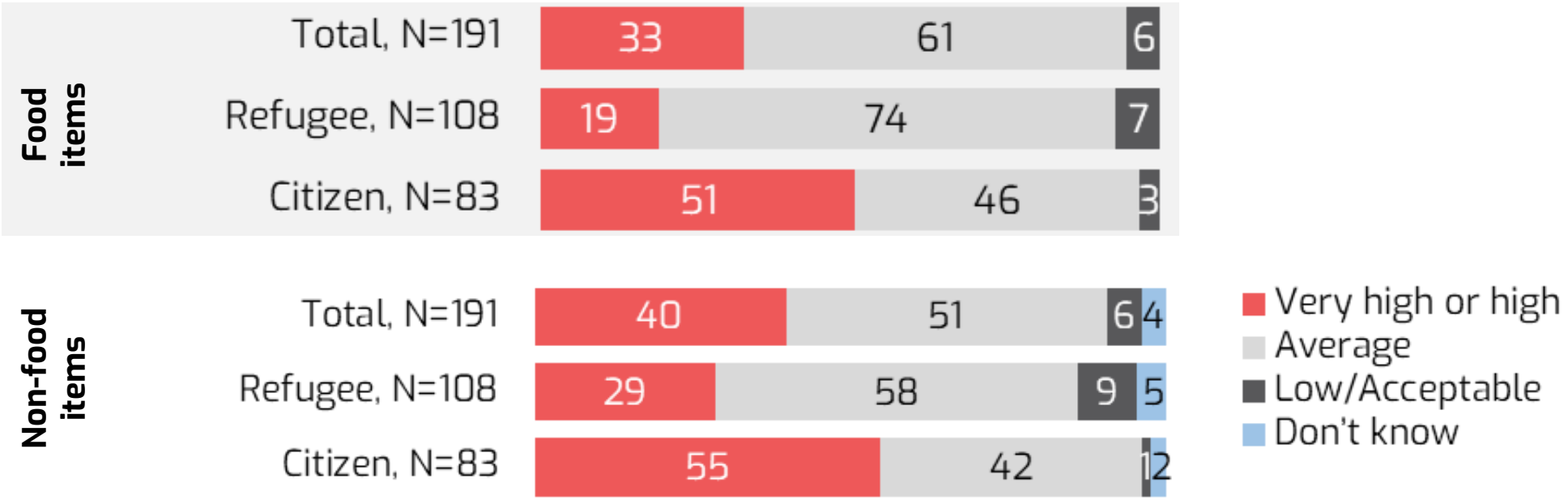
Customers Survey



74% of customer respondents mentioned that the nearest market where they usually bought food items was located less than 1 km away. 56% said the same about their usual market for non-food items.

Q3.2. Please assess the level of prices for food items in this market / Q3.5. Please assess the level of prices for non-food items in this market. (one answer), %

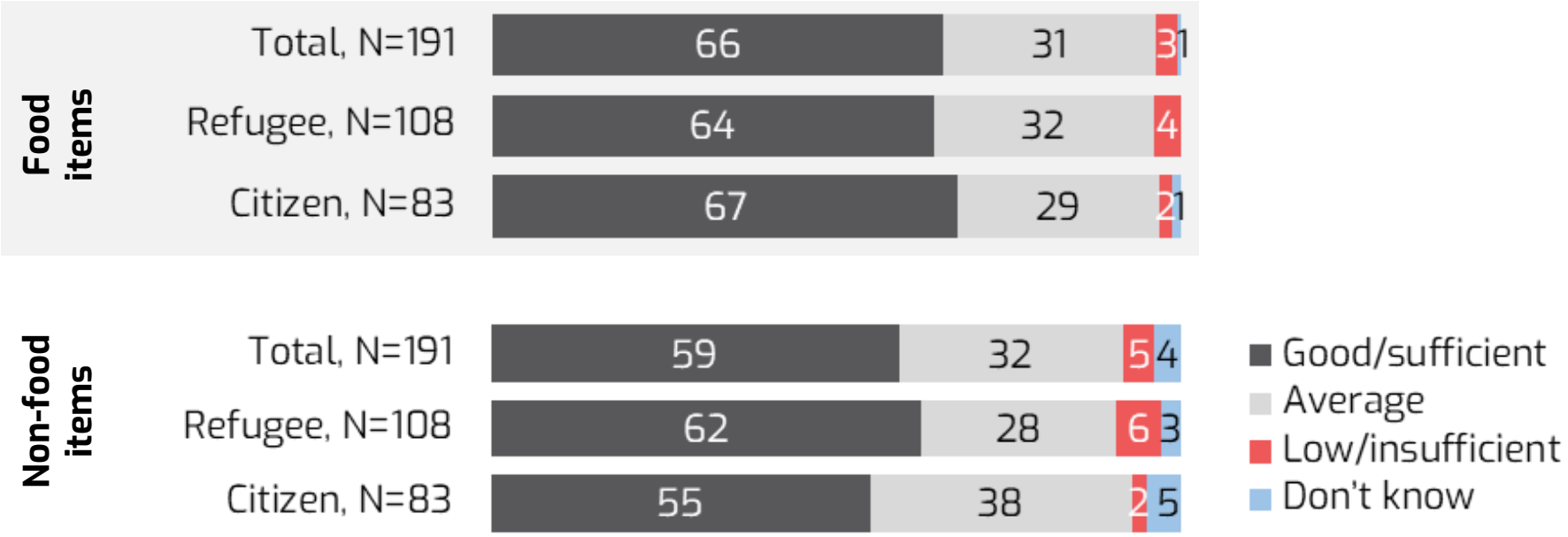
Customers Survey



61% of customers assessed the price level for food items in their usual market as average. 51% mentioned the same about non-food items.

Q3.3. Please assess the level of assortment/diversity of food items in this market / Q3.6. Please assess the level of assortment/diversity of non-food items in this market. (one answer), %

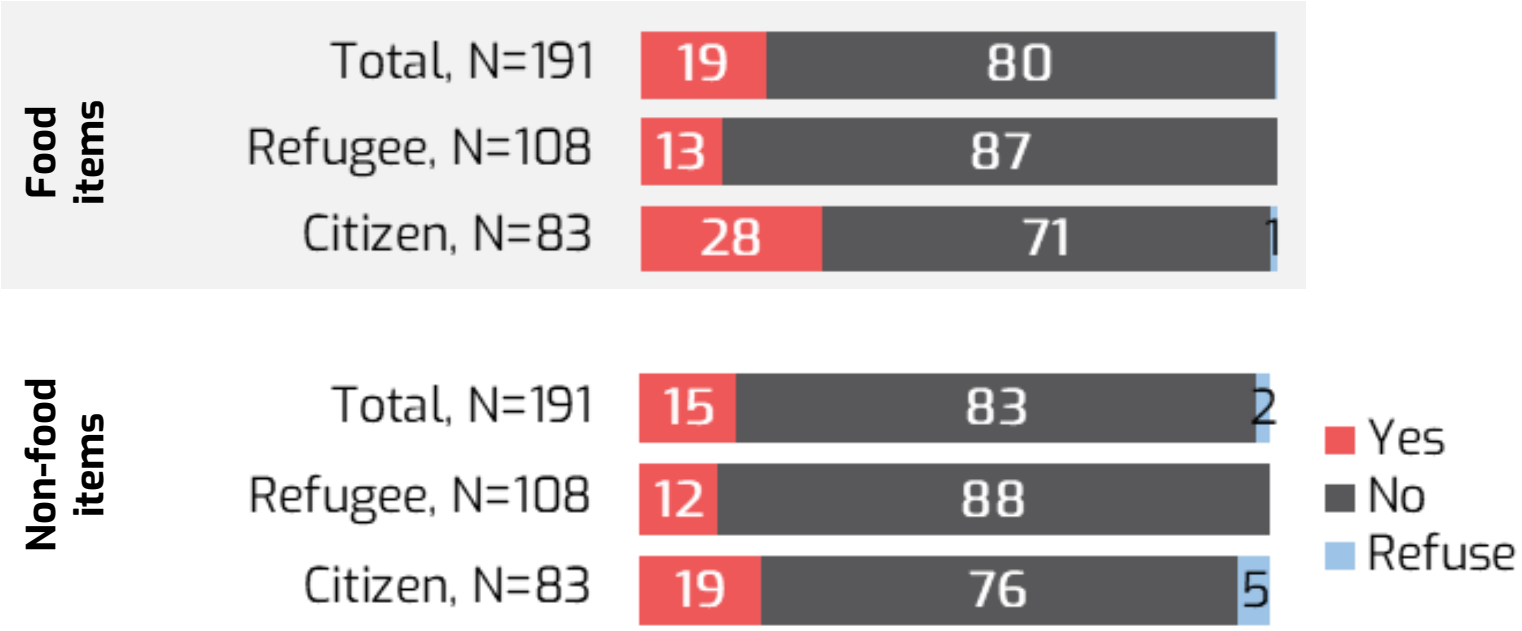
Customers Survey



Most customer respondents believe that the level of diversity of food and non-food items at the nearest market where they typically buy is good or sufficient.

Q3.7. In the past 3 months, has there been a time when you or members your household could not access any food item that are usually part of your diet by this time of the year? / 3.9. In the past 3 months, has there been a time when you or members your household could not access essential non-food items that you are usually buying during this time of the year? (one answer), %

Customers Survey

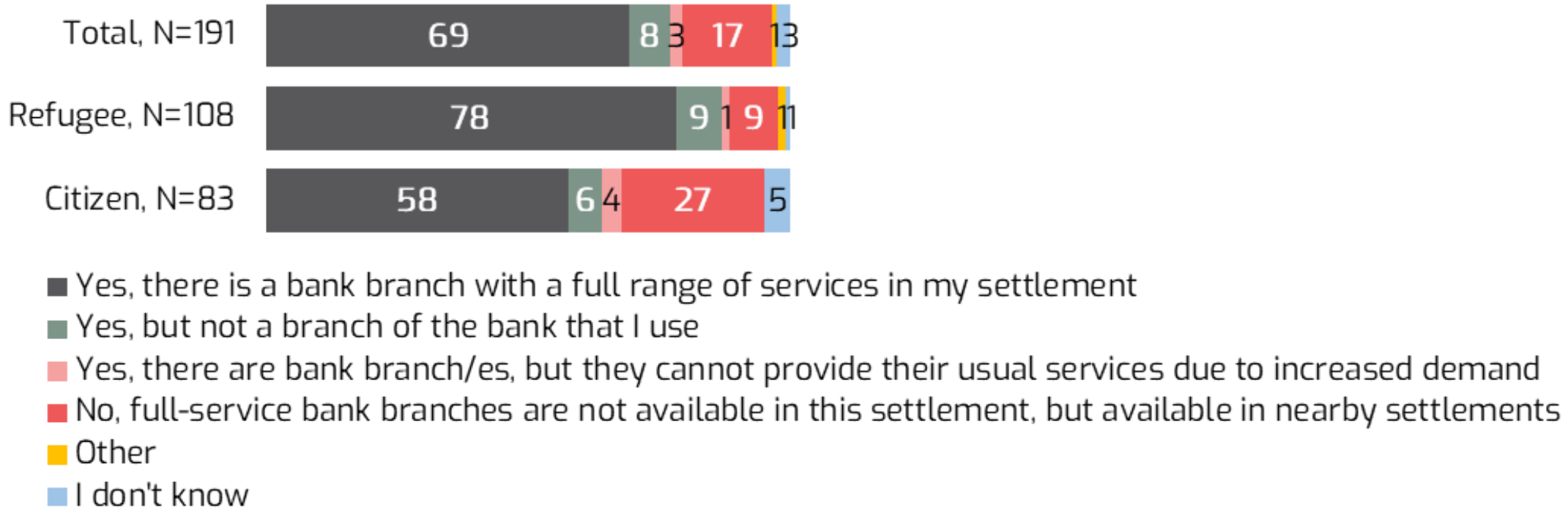


Most surveyed customers did not encounter any instances where they were unable to access any food or non-food items that are typically part of their diet.

Availability of financial service providers

Q5.1. Are there bank branches in your locality and are they currently open? (one answer), %

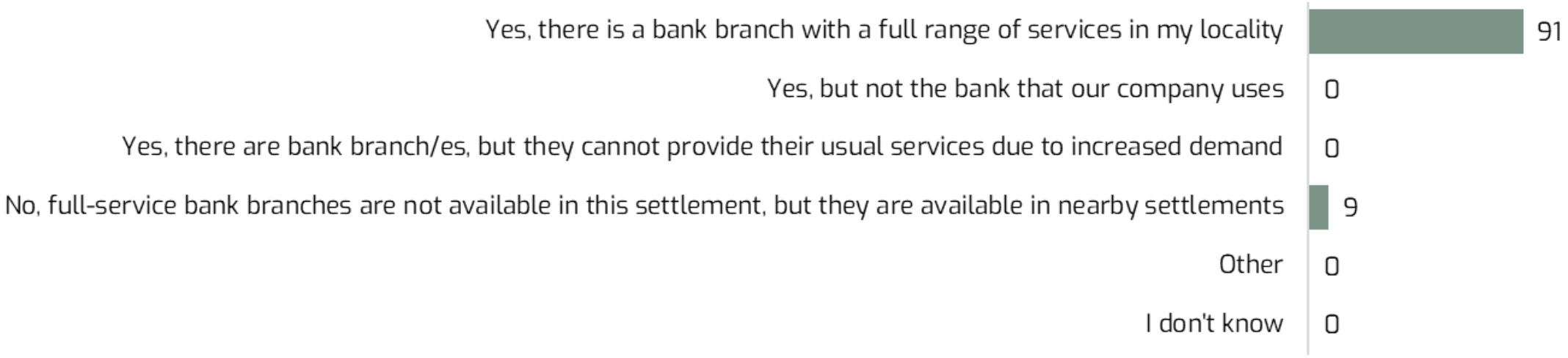
Customers Survey



The majority of customers (69%) said there are bank branches with a full range of services in their settlement.

Q6.1. Are there bank branches in your locality and are they currently open? (one answer), N=46, %

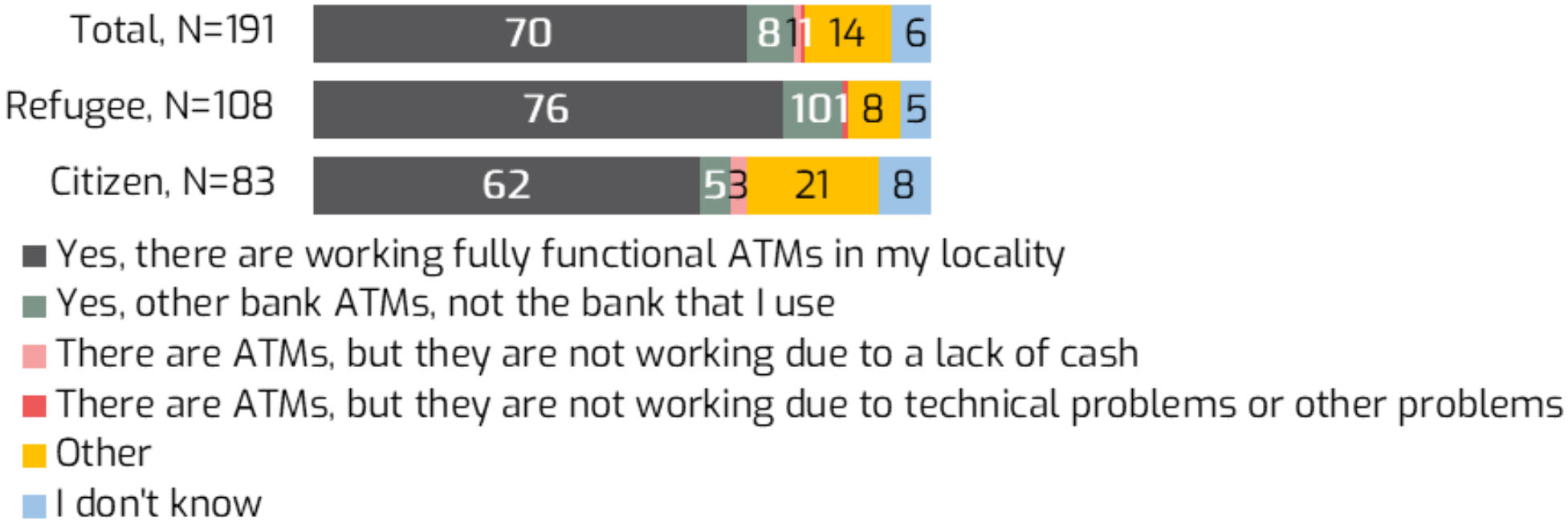
Retailer Survey



91% of the retailers mention that there is a bank branch with a full range of services in their locality.

Q5.2. Are there any ATMs in your locality and are they working? (one answer), %

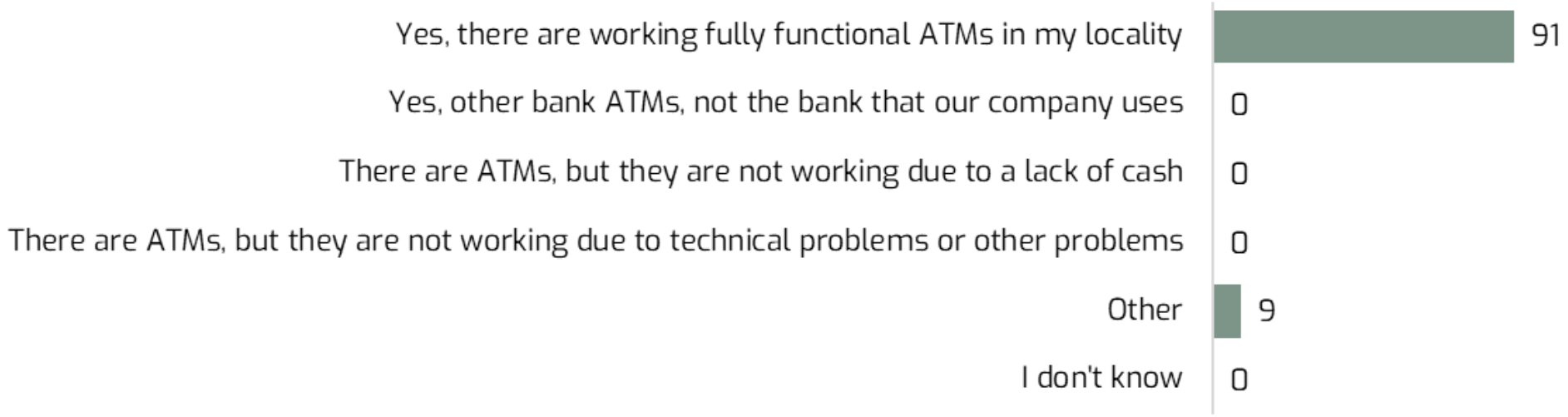
Customers Survey



Most surveyed customers (70%) have working fully functional ATMs in their localities. One in ten refugees (10%) mentioned the ATMs are from another bank.

Q6.2. Are there any ATMs in your locality and are they working? (one answer), N=46, %

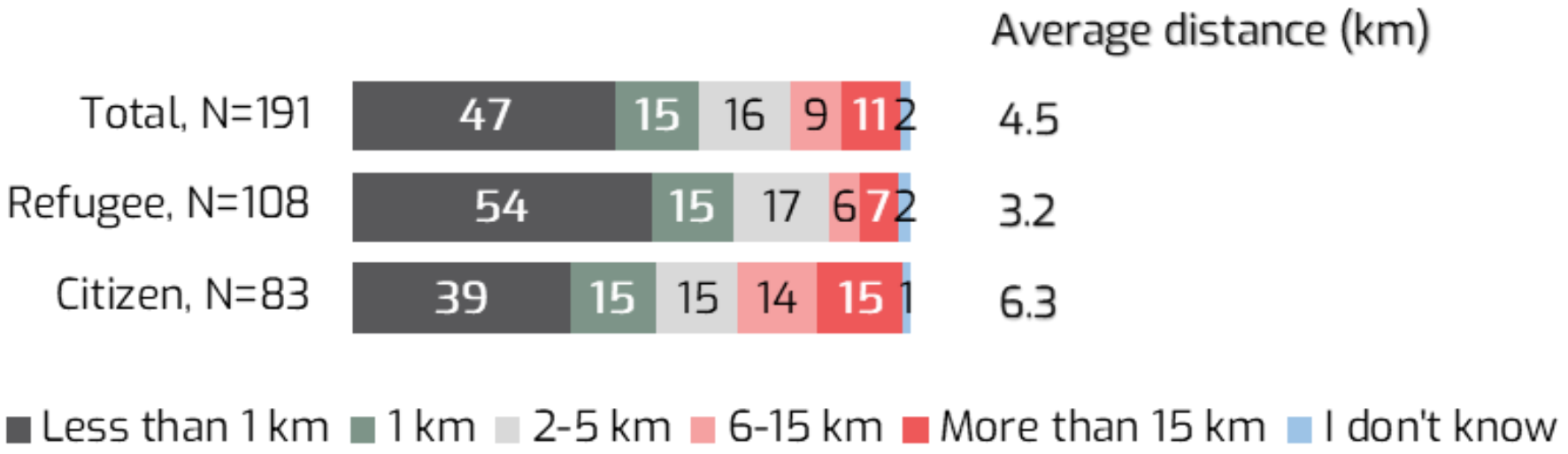
Retailer Survey



Nine out of ten retailers state that there are installed ATMs in their locality that are working and are fully functional (91%).

Q5.3. How far away is the nearest bank located? (one answer), %

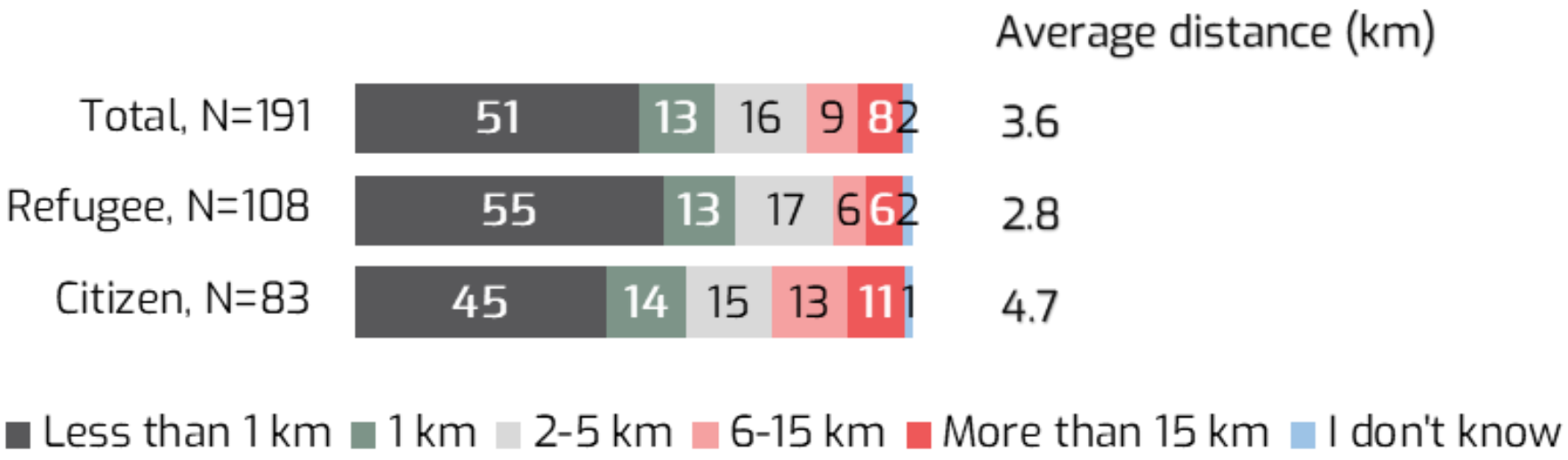
Customers Survey



For almost half of the surveyed customers (47%), the nearest located bank is less than 1 km away. The average distance to the nearest located bank among respondents is 4,5 km.

Q5.4. How far away is the nearest ATM located? (one answer), %

Customers Survey



For roughly half of the customers (51%), the nearest located ATM is less than 1 km away. The average distance to the nearest located ATM among respondents is 3,6 km.

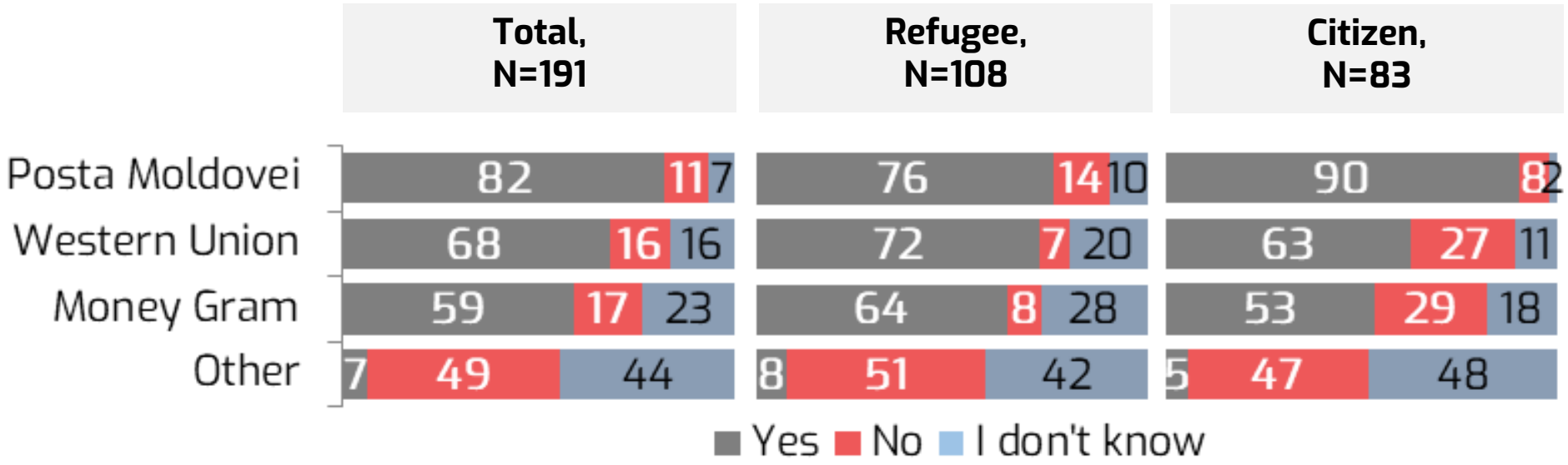
Q6.3 – Q6.4. How far away is the nearest bank located? How far away is the nearest ATM located? (one answer per row), N=46, %

Retailer Survey

Roughly three out of four surveyed retailers mention that the nearest bank and ATM is located in less than 1 km.

Q5.5. Are other financial services available in your locality (national and international financial transfers)? (one answer per row), %

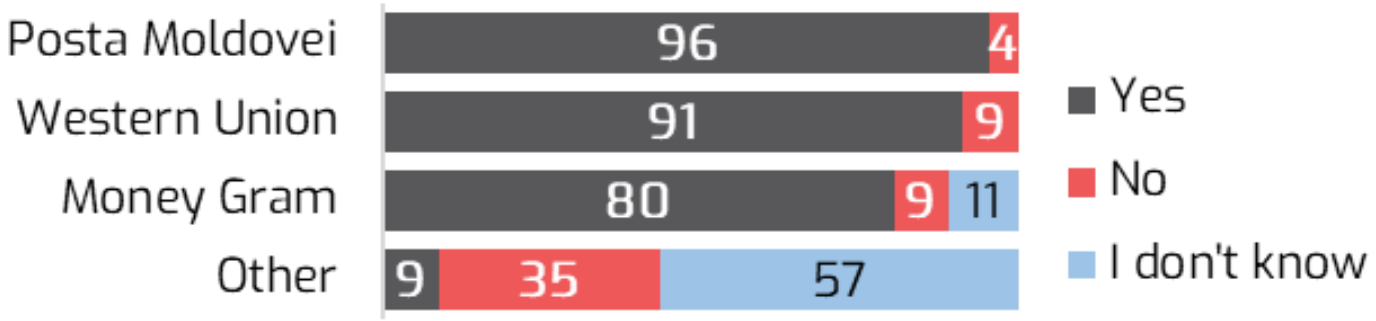
Customers Survey



Posta Moldovei is available in the localities of the majority of customers, with a prevalence of 82%. Western Union is available in 68% of the localities, while Money Gram is available in 59% of them.

Q6.5. Are other financial services available in your locality (national and international financial transfers? (one answer per row), N=46, %

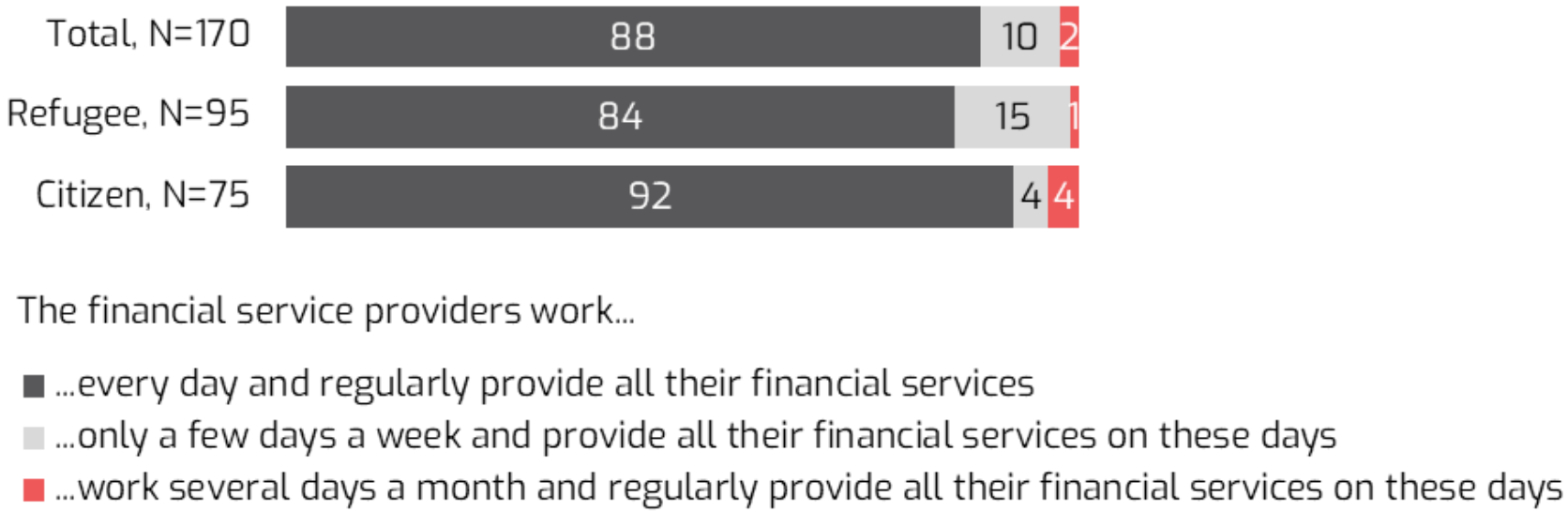
Retailer Survey



The majority of surveyed retailers said that all of the financial services mentioned are available in their locality.

Q5.6. The financial service providers work...(one answer), % among respondents that indicated having financial service providers in their locality

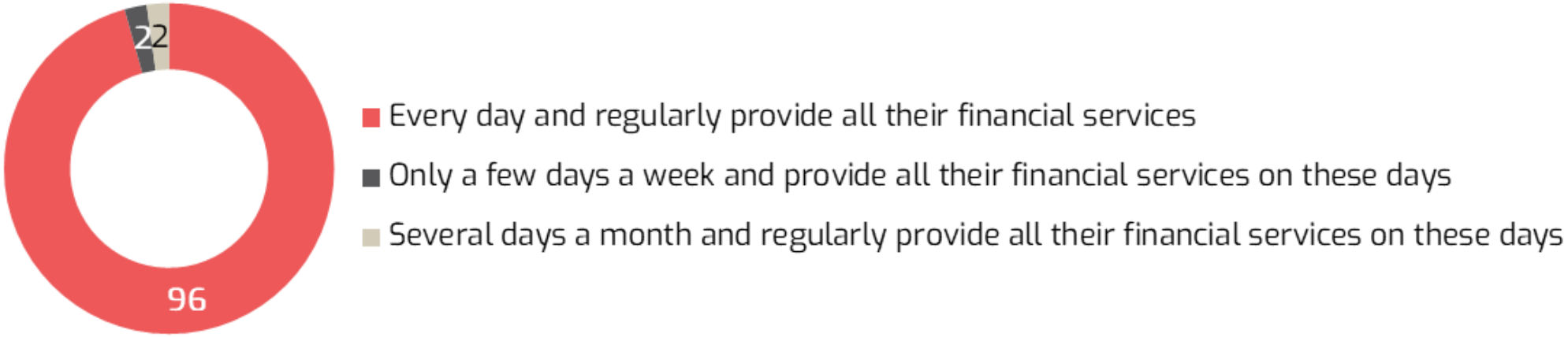
Customers Survey



Most interviewed customers (88%) said that the financial service providers work every day and regularly provide all their financial services.

Q6.6. The financial service providers work....(one answer), N=46, %

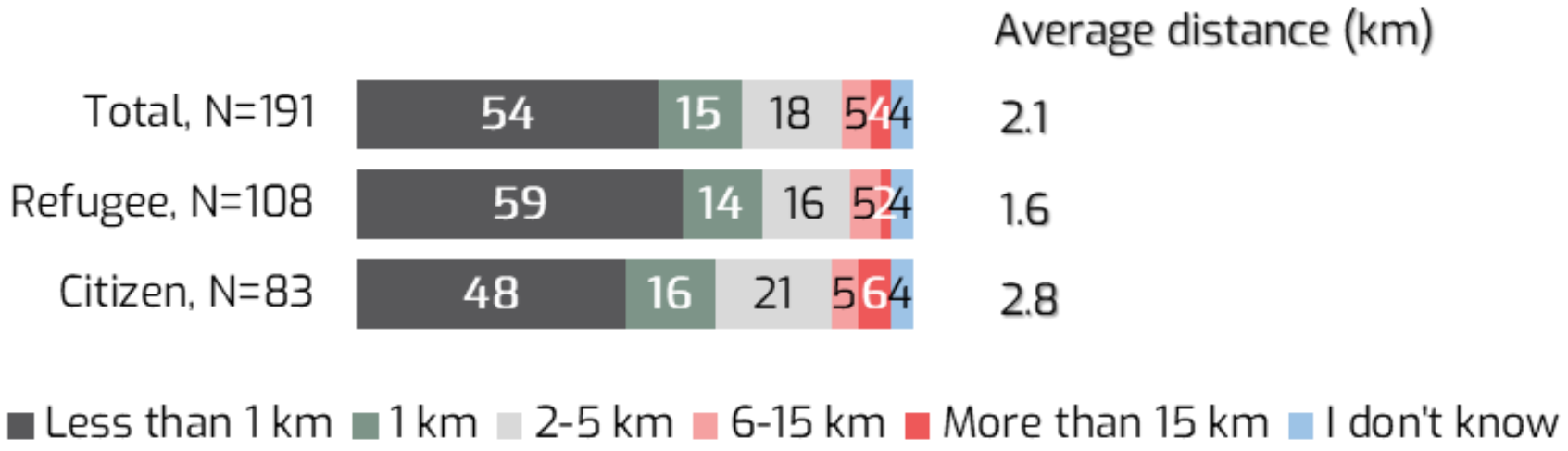
Retailer Survey



Similarly, most retailers mention that the financial service providers work every day and regularly provide al their financial services.

Q5.7. How far away is the nearest financial service provider located? (one answer), %

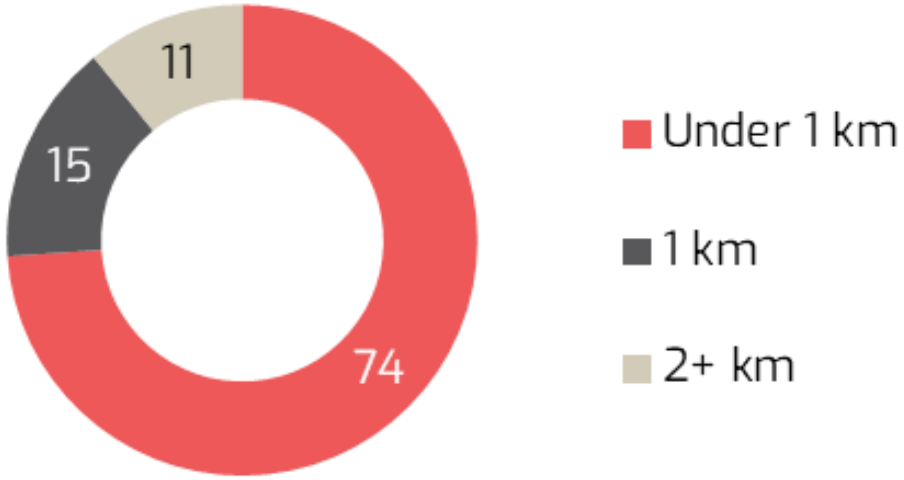
Customers Survey



For over half of the customer respondents (54%), the nearest financial service provider is located less than 1 km away.

Q6.7. How far away is the nearest financial service provider located? (one answer), N=46, %

Retailer Survey

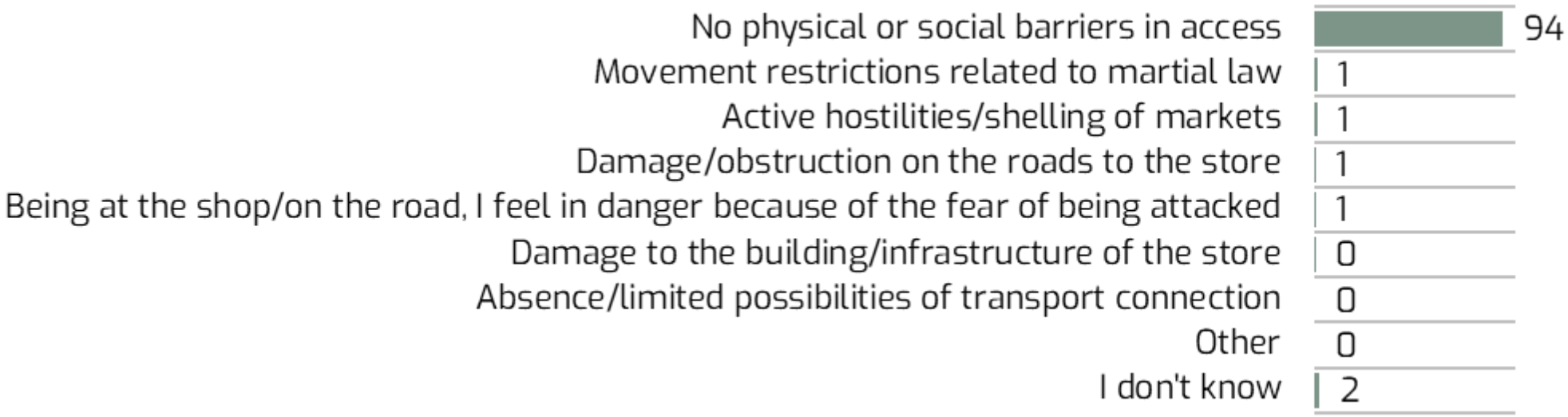


Three quarters of surveyed retailers say that the nearest financial service provider is located in less than 1 km (74%).

Difficulties and expectations

Q2.6. In the last 30 days, did households in this region face any of the following barriers to consistently accessing marketplaces? (one answer), N=191, %

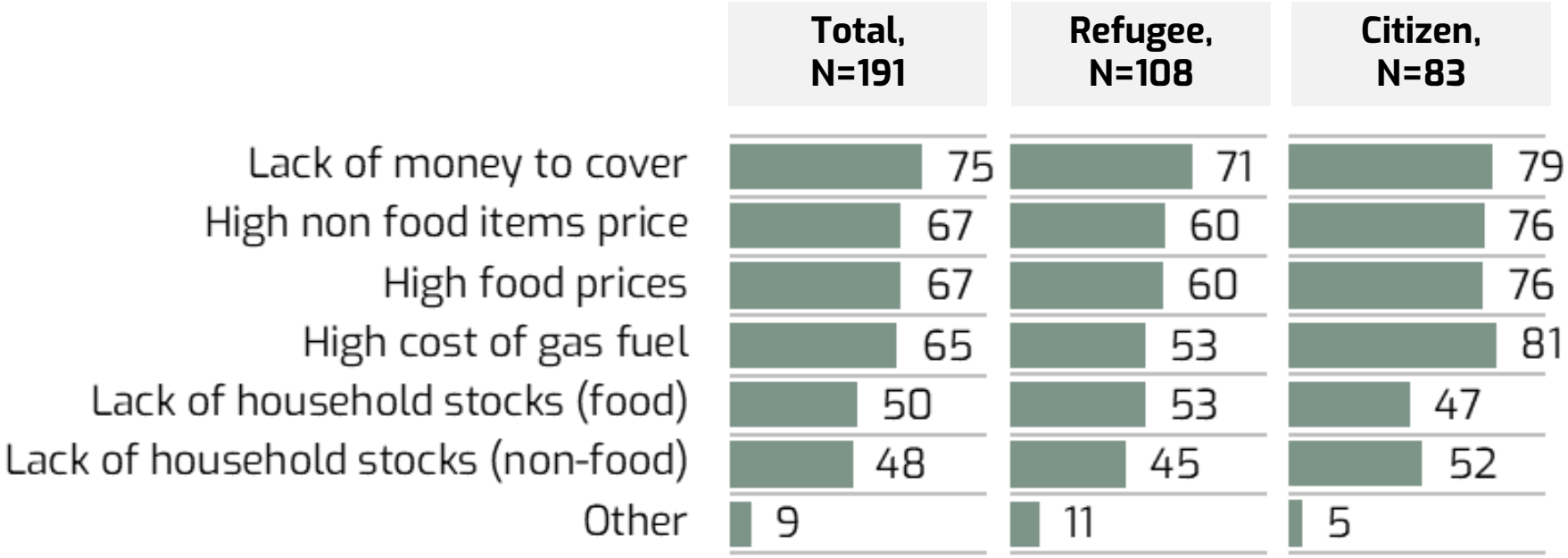
Customers Survey



Overall, no physical or social barriers in accessing marketplaces were mentioned by surveyed customers (94%).

Q4.1. What are the main problems with accessing essential food and non-food items you have faced during the same period of the year? (multiple answer), %

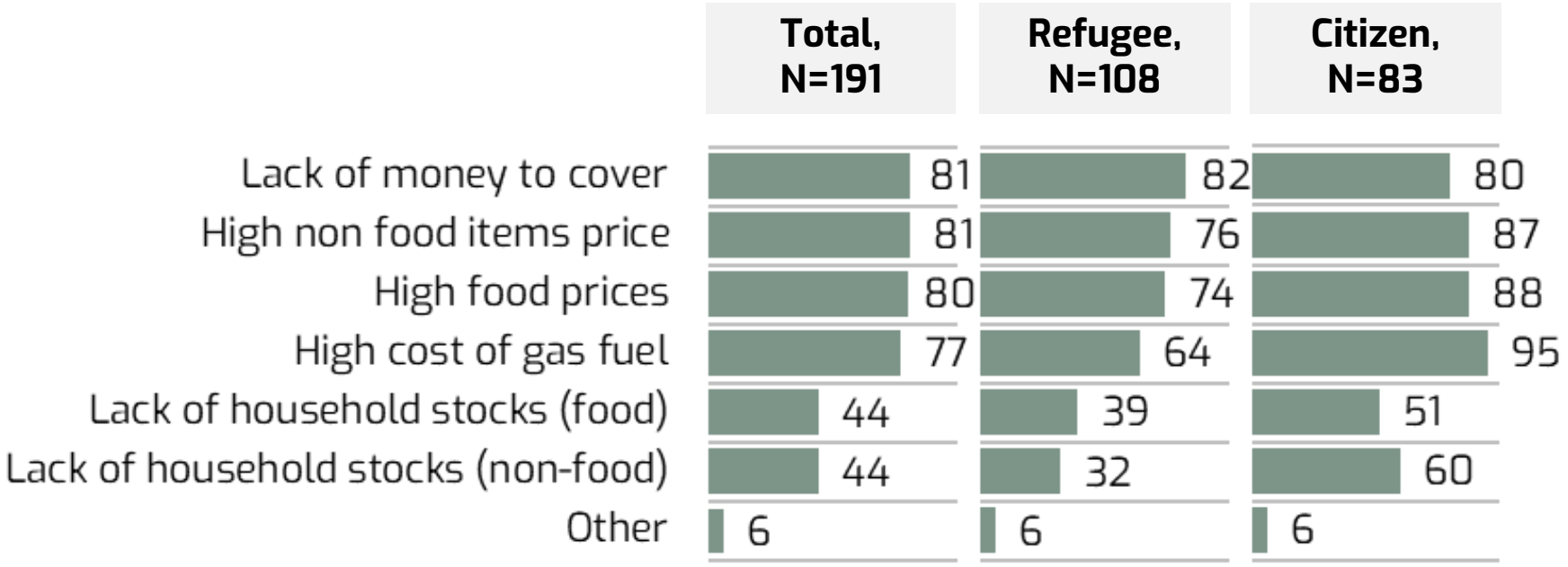
Customers Survey



The top four difficulties most frequently encountered by customer respondents in accessing essential food and non-food items in the past were as follows: lack of money to cover the essential needs (75%), high prices for non-food items (67%), high prices for food items (67%), and the high cost of gas fuel (65%).

Q4.2. What are the main problems with accessing essential food and non-food items you have faced currently? (multiple answer), %

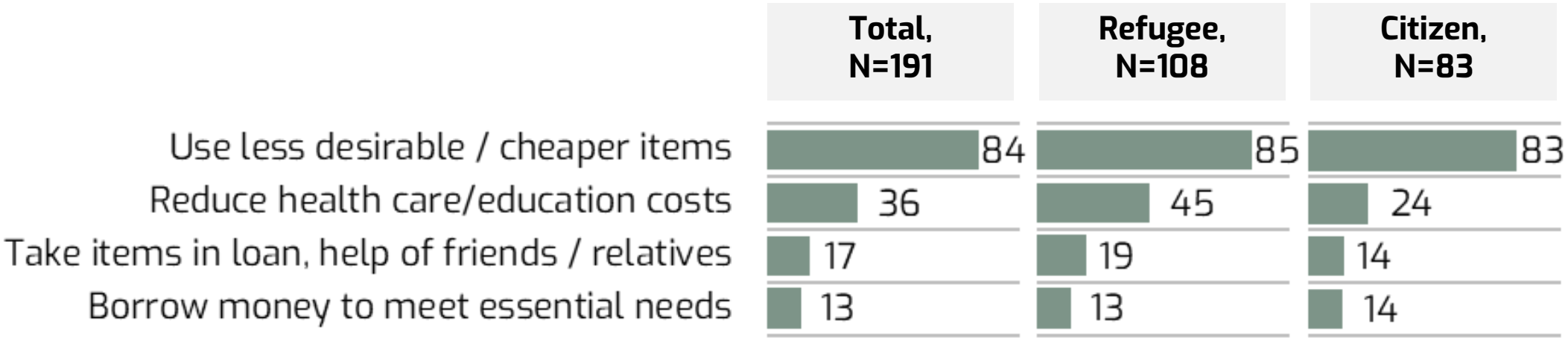
Customers Survey



Currently, the top main problems customer respondents are facing in accessing essential food and non-food items are the same as last year, with an increase in their prevalence.

Q4.3. How do you cope with these problems? (multiple answer), %

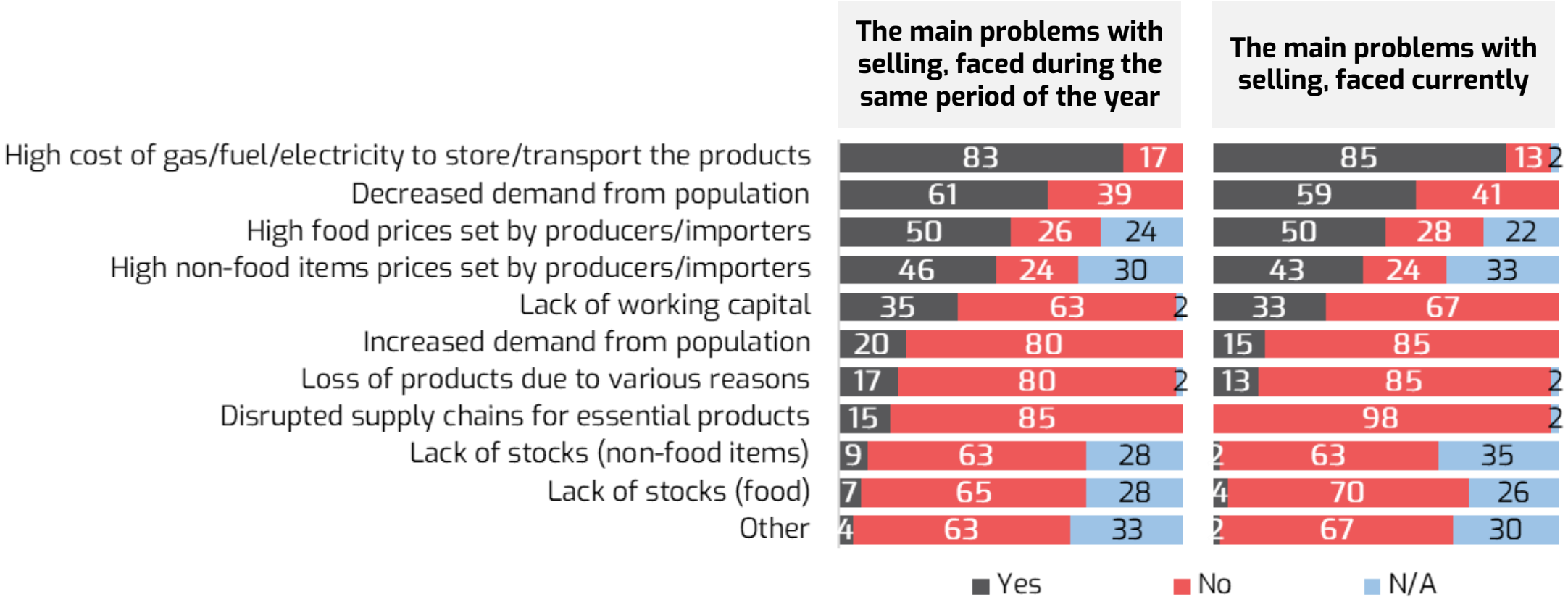
Customers Survey



To cope with the aforementioned problems, the majority of surveyed customers (84%) resort to using less desirable or cheaper items. Additionally, nearly half of the refugees (45%) stated that they also reduce costs related to health care and education.

Q5.1. What are the main problems with selling the products that you have faced during the same period of the year?/ Q5.2. What are the main problems with selling the products that you have faced currently? (one answer per row), N=46, %

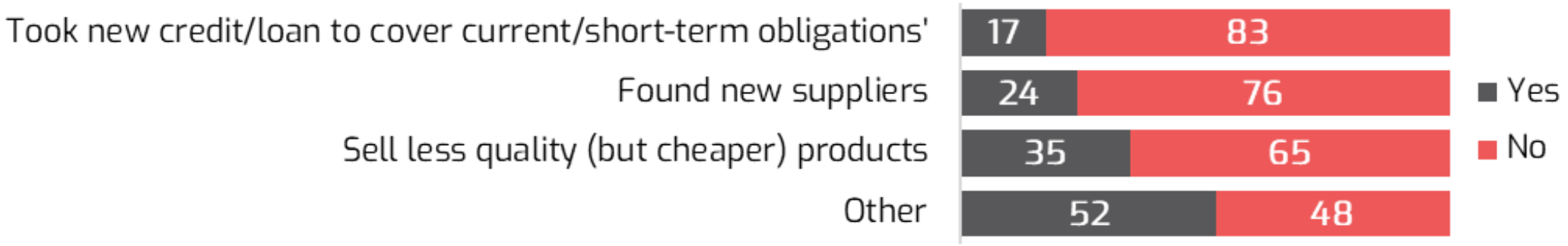
Retailer Survey



The majority of interviewed retailers think that the main problems with selling that were faced during the same period of the year are the high cost of gas, electricity and transportation of the products (83%). 85% of the retailers say that they are also currently facing the same problem.

Q5.3. How do you cope with these problems? (one answer per row), N=46, %

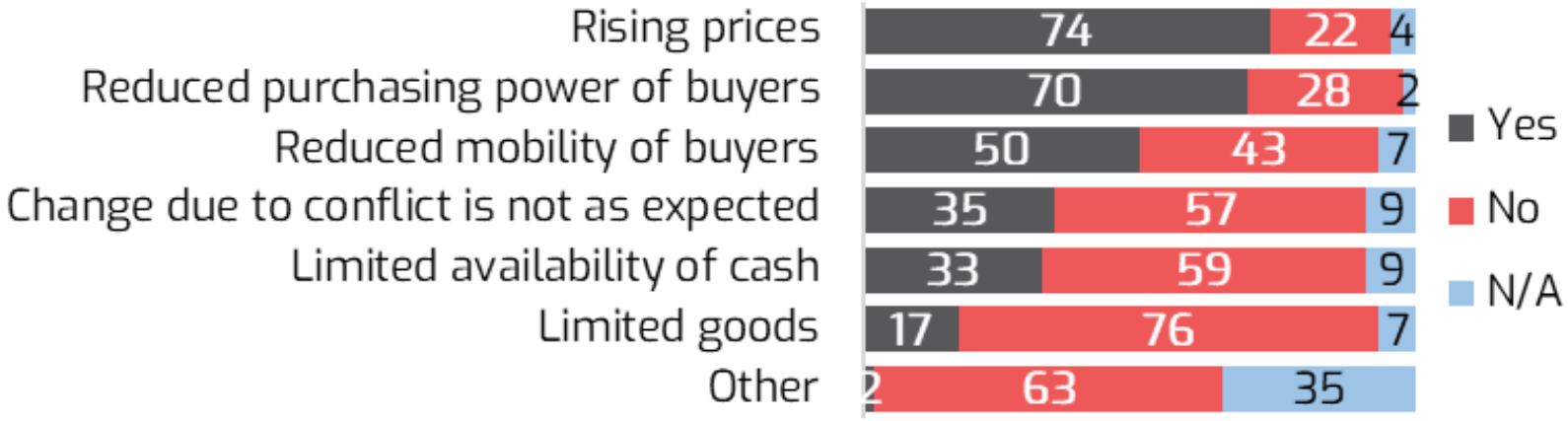
Retailer Survey



More than a third of the retailer respondents say that they have to sell less quality but cheaper products to cope with the problems mentioned previously (35%).

Q5.4. Do you expect any changes in the work of your company in the near future due to the conflict in Ukraine? (one answer per row), N=46, %

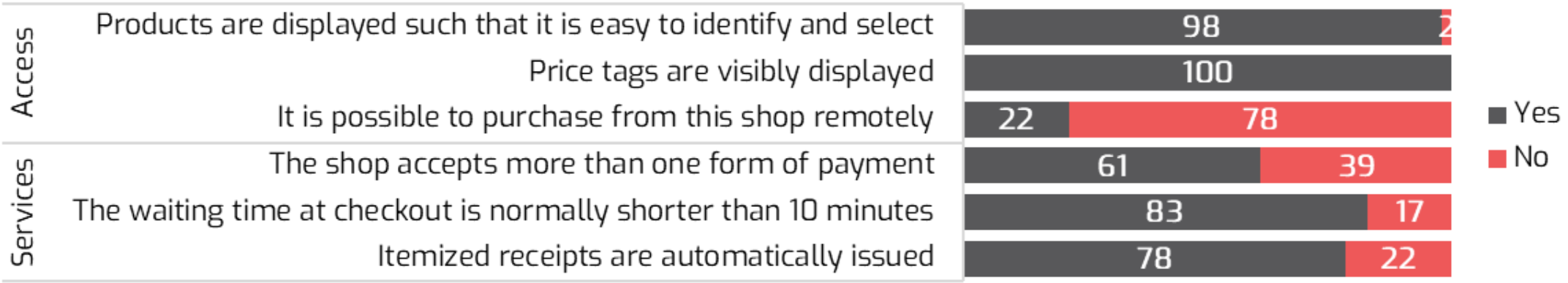
Retailer Survey



74% of surveyed retailers expect a rise in prices in the near future due to the conflict in Ukraine and 70% expect a reduced purchasing power of buyers, while 50% - reduced mobility of buyers.

Q4.5 – Q4.6. Which of the following applies to this shop?, (one answer per row), N=46, %

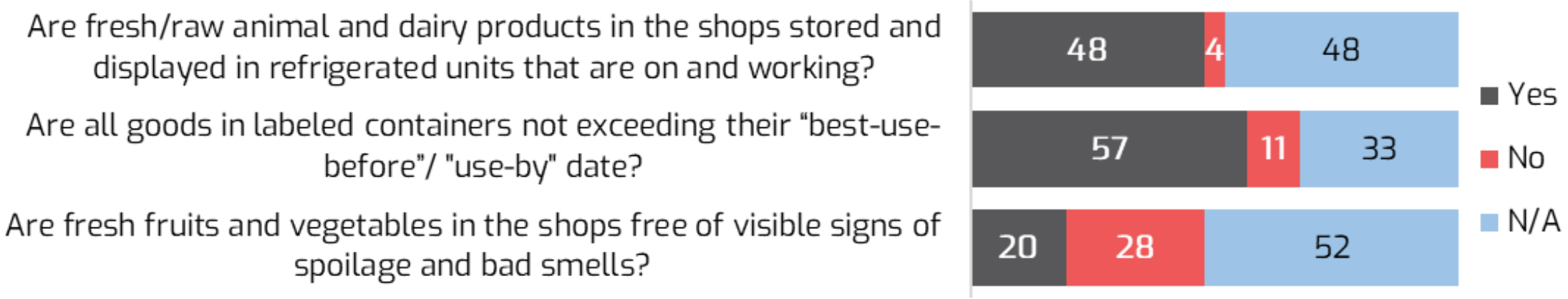
Retailer Survey



Almost all of the retailer respondents mention the products in the store are displayed such that it is easy to identify and select the needed product and the price tags are visible. On the other hand, 78% say that it is not possible to purchase from the shop remotely.
Regarding the services, 61% of the retailers say that the store accepts more than one form of payment, while 39% - that the store accepts only one payment method.

Q4.7 – Q4.9. Quality assessment, (one answer per row), N=46, %

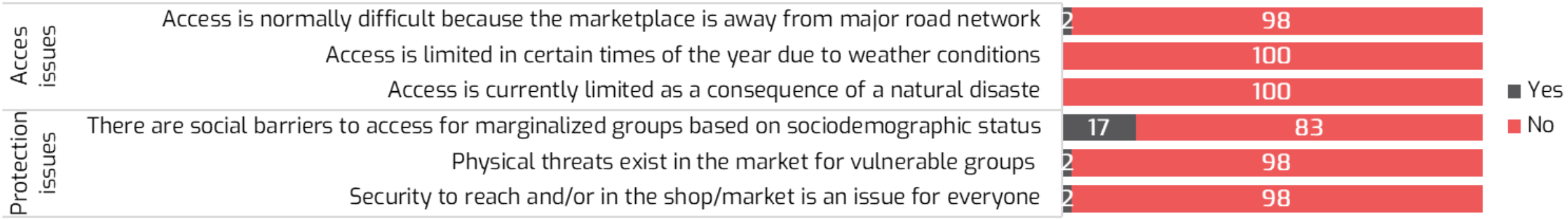
Retailer Survey



In nearly half of the stores that entered the study, fresh/raw animal and dairy products in the shops are stored and displayed in refrigerated units that are on and working.
More than half of the store representatives, who participated in the research, mention that all goods in labelled containers do not exceed their "best-use-before"/ "use-by" date.
Every fifth respondent mentions that fresh fruits and vegetables in the shops are free of visible signs of spoilage and bad smells.

Q4.10. – Q4.11. Access assessment (one answer per row), N=46, %

Retailer Survey



Most retailers state that there are no issues regarding the access to the stores. At the same time, 17% consider that there are social barriers to access for marginalized groups based on sociodemographic status.

Thank you!

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