

CAF

CENTRAL ASIA FASHION

SPRING-2024

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Almaty, Kazakhstan

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33 МЕЖДУНАРОДНАЯ ВЫСТАВКА МОДЫ INTERNATIONAL FASHION EXHIBITION

Создавая новые возможности

Spring-2024



Glocalization of Central Asia Hope Index and Demographics

At the business conference of the 33rd International Fashion Exhibition Central Asia Fashion, leading experts in the field of sociological and marketing research in Kazakhstan and fashion industry designers-manufacturers discussed the topic of world globalization in the local space of Central Asia, called «glocalization».



Participants in the panel discussion of the CAF business conference (from left to right):
Evgeniy Skuratov, Natalia Ospanova, Svetlana Chernenko, Aigul Kasymova, Zalkar Askarali Uulu

The panel discussion speakers discussed in detail the following issues: dynamic changes in the «hope index», lifestyle, values and life strategies of the residents of Kazakhstan, as well as the demographic situation in the countries of Central Asia and the global trend towards globality and locality.

During a lively discussion, respectable business conference experts discussed new digital transformations of business, cross-border trade opportunities, non-cash payments by the population, and also made basic forecasts for changes in material and economic well-being in the near future. Experts agreed that now, more than ever, the most favorable conditions for the growth and development of business in Central Asia have arisen, while the most prepared and «flexible» players have received a real opportunity to scale and announce their business at the international level.

«Hope Index»

Speaker of the business conference, Research Director of the Center of Information, Sociological and Marketing Research BISAM Central Asia, Andrey Skuratov, presented the audience with analytical data on the dynamic changes in the «hope index». As stated by the expert, despite the fact that Kazakhstan, according to the survey results, was lost among 41 world countries in the international ranking in terms of the «hope and well-being index», the Kazakh people themselves have not lost their optimism. According to the presented analytical data, this happened to a greater extent due to the values that the country's residents are accustomed to relying on.



Speaker of the CAF business conference: Research Director of the Center of Business, Information, Sociological and Marketing Research «BISAM Central Asia» Andrey Skuratov (Kazakhstan, Almaty)

«At the end of each year, as part of a global survey by Gallup International Association, we measure the economic indicators of the country's material well-being, identify a «hope index» and explore social and political issues. First, let me explain what the «hope index» is. In the data presented, the definition is optimists; these are those who, when asked: do you think 2024 will be better, worse, or the same as the previous year, answered positively, that is, better. Pessimists are those who, on the contrary, answered negatively, that is, it will be worse, and neutrals are those who answered that the current year 2024 will be equally similar to the past year. The «hope index» is defined as the difference between the proportion of those who responded 'better' and those who responded 'worse' among the countries participating in the survey. The main thing I would like to note is that, at the end of last year, the «hope index» came out with a positive value, +13 positions, and this is significant progress, considering that at the end of the previous year it had a negative value. This means that in the coming year there are more optimists in the world as a whole and they are in the vanguard.

Индекс надежды. ТОП-5



14-я строчка для Казахстана неплохой результат. Как правило, рейтинг оптимистов возглавляют развивающиеся страны, в то время как среди пессимистов чаще больше стран с развитой экономикой и демократическими институтами.

| ТОП-5 ОПТИМИСТОВ (по значению Индекса надежды) | ТОП-5 ПЕССИМИСТОВ (по значению Индекса надежды) |
|---|--|
| САУДОВСКАЯ АРАВИЯ: +82 | БОСНИЯ И ГЕРЦЕГОВИНА: -45 |
| ИНДОНЕЗИЯ: +61 | ИТАЛИЯ: -22 |
| КОСОВО: +52 | СЕРБИЯ: -21 |
| АФГАНИСТАН/ИНДИЯ: +47 | БОЛГАРИЯ: -20 |
| АЛБАНИЯ: +46 | ПОРТУГАЛИЯ: -15 |

Казахстан: +28 (14-я позиция)

Вопрос: Как Вы считаете, 2024 год будет лучше, хуже или таким же, как 2023-й? (41 страна в 2023 году)

Slide from Andrey Skuratov's presentation. World «Hope Index» and place in Kazakhstan

Compared to last year, among the ranking of the presented top-5 optimistic and pessimistic countries, Kazakhstan added +28 positions in terms of the hope index and now occupies 14th place in the overall ranking. However, these data can be interpreted in two ways. We see that the «top optimists» rating is made up of countries such as Kosovo, Afghanistan, India, Albania, which always experience social and economic problems in terms of the development of civil society institutions. At the same time, Indonesia and Saudi Arabia, presented in the ranking,

appeared at the top of the list as an exception. From this point of view, the 14th position of Kazakhstan is very good. But, on the other hand, of course, this is definitely negative - and this is not very good.



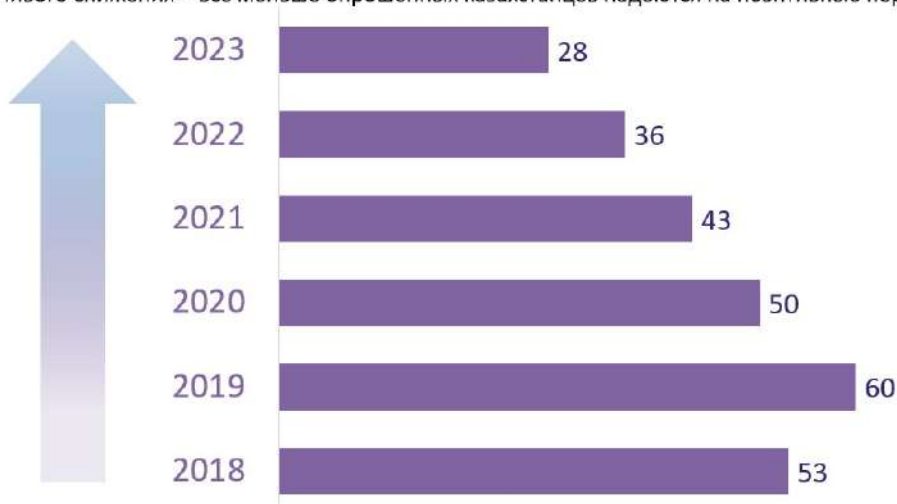
Participants in the panel discussion of the CAF business conference (from left to right):
Evgeniy Skuratov, Natalia Ospanova, Svetlana Chernenko

A drop in the level of hope in general may indicate that our population has become more demanding about their standard of living, and this directly affects consumption. Kazakhstanis took off their 'rose-colored glasses' and began to clearly understand what needs to be done in terms of economic development, first of all, so that their level of hope increases».

Динамика индекса надежды в Казахстане

BISAM
CENTRAL ASIA

Вопреки мировому тренду, к 2024 году показатель Индекса продолжает демонстрировать тенденцию устойчивого снижения – всё меньше опрошенных казахстанцев надеются на позитивные перемены.



Slide from Andrey Skuratov's presentation. Dynamics of the «hope index» in Kazakhstan

Lifestyle, values and life strategies of Kazakhstanis

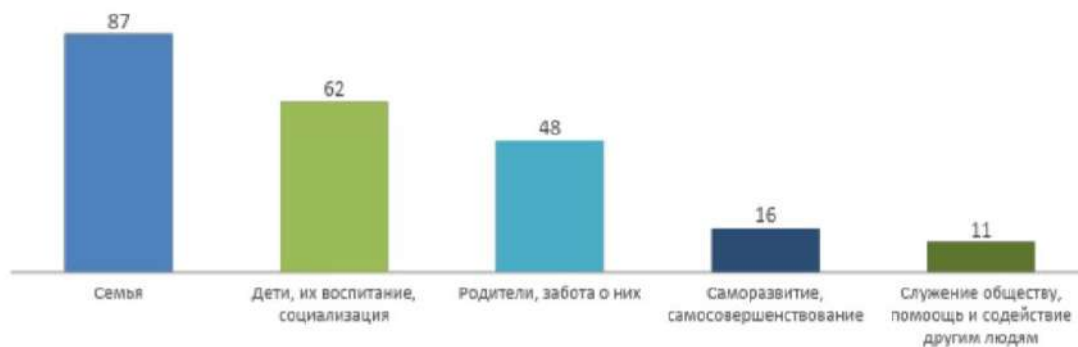
Speaking about the downward trend in the «hope index» of Kazakhstanis, speaker Andrey Skuratov spoke about what underlies the value orientation of the country's residents.

«The main backbone, which forms the foundation of the values of Kazakhstanis, is focused on the institution of family: children, their upbringing, socialization, parents, caring for them, the family as a whole. The main guidelines of Kazakhstanis are determined by their future role and place in society, the creation of a comfortable living environment, so all this, of course, affects the consumption structure. I would like to note that Kazakhstanis have a fairly good level of aspirations within the framework of individual activity that are among the top-5 main values: self-development, self-improvement, serving society and helping other people...».

Образ жизни, ценности и жизненные стратегии

Что лежит в основе ценностной ориентации казахстанцев?

Ценностные ориентиры центрированы на институте семьи и семейных ценностях, определяются будущей ролью и местом в обществе, создание комфортной жизненной среды.

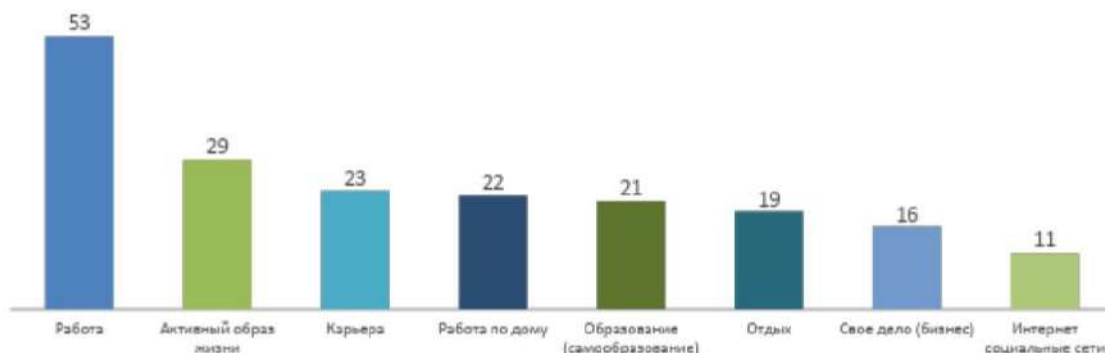


Slide from Andrey Skuratov's presentation. Lifestyle, values and life strategies of Kazakhstanis

The BISAM Central Asia expert analyst also told the audience in what order Kazakhstanis prioritize their tasks on a daily basis. Work comes first, followed by an active lifestyle, career, housework, education and self-development. At the same time, social networks in the list of priority daily tasks of the average Kazakh citizen are only in eighth place in terms of importance.

Образ жизни, ценности и жизненные стратегии

Ценности и устремления в рамках индивидуальной активности – как опрошенные казахстанцы выстраивают приоритетность ежедневных задач.



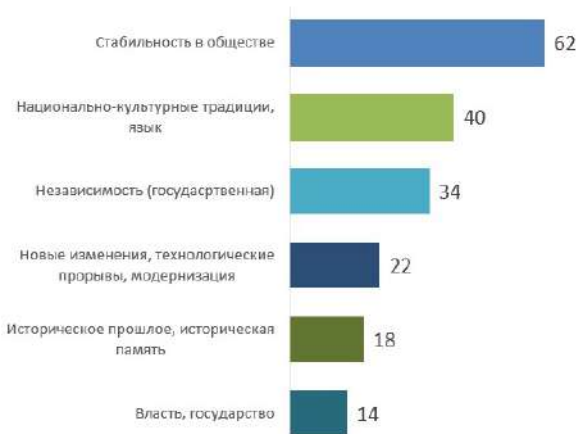
Slide from Andrey Skuratov's presentation. Lifestyle, values and life strategies of Kazakhstanis

«I would like to note that regarding the context of the «phenomenon of consumer patriotism» and its development in Kazakhstan, a very strong demand is observed among our respondents (and this is more than 3,500 people throughout Kazakhstan aged 18-65 years), for national and cultural traditions, language, state independence, historical past and memory. All this is one of the strongest national symbols of freedom. This means that we see a fairly big future for the development of local, domestic brands, which are designed, among other things, to emphasize our individuality and independence», - summed up speaker Andrey Skuratov.

Concluding his speech, business conference speaker Andrey Skuratov told event visitors about forecasts for changes in the material well-being of Kazakhstanis.

«We asked our Kazakh respondents: if you think about the economic prospects for you and your family, what will your and your family's situation be in 2-3 years? As a result, it turned out that the majority of our compatriots clearly see the medium-term horizon. In general, Kazakhstan looks more optimistic than other developing countries. But such developed countries as Japan, France, Italy, Great Britain and others are less pessimistic in their

Среди опрошенных казахстанцев очень силен запрос на язык и национально-культурные ценности, политический суверенитет как один из сильнейших национальных символов свободы



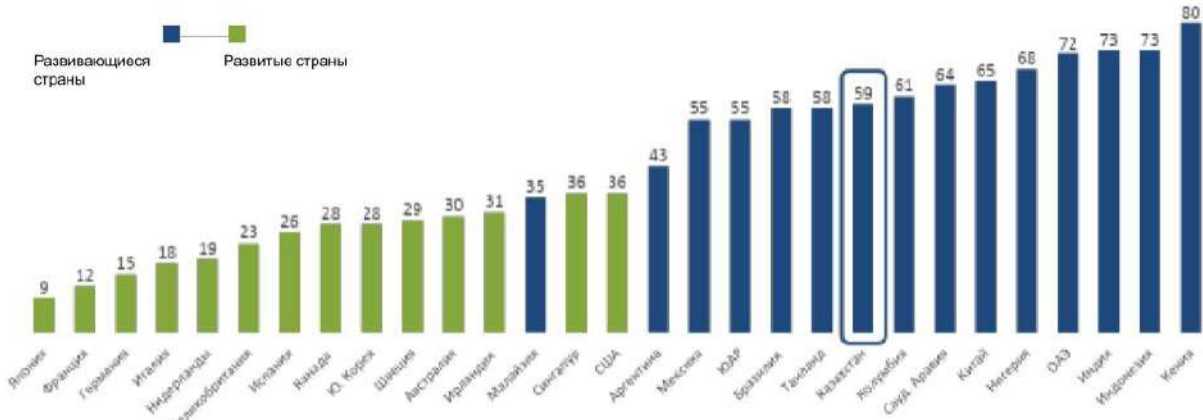
Slide from Andrey Skuratov's presentation. Language, national and cultural values of Kazakhstanis

forecasts. In general, the share of those who hope for economic prosperity in their countries has increased slightly over the past couple of years, while the share of pessimists has decreased. But it still remains quite high - 39%. I would like to note that we record a very large share of those who say that the coming year is designated as a year of economic difficulties, or those who believe that it will be the same, essentially, in terms of stability».

Прогнозы изменения материального благополучия

Более половины опрошенных верят в позитивные экономические перспективы для себя и своих близких.

На фоне прочих развивающихся стран Казахстан по данному показателю выглядит более оптимистичней остальных



Вопрос: Если подумать об экономических перспективах для Вас и Вашей семьи, как Вы думаете, каким будет Ваше положение и положение Вашей семьи через 2-3 года?

Slide from Andrey Skuratov's presentation. Forecasts for changes in the material well-being of Kazakhstanis

Is the population in Central Asia aging or getting younger?

Discussing the topic «Glocalization of Central Asia» during the panel discussion, experts at the CAF business conference paid special attention to the changes in demographic situation. Three countries underwent professional analytical analysis: Kazakhstan, Uzbekistan and Kyrgyzstan. Director of the Alvin Market group of research companies and president of the «Kazakhstan Association of Professional Public Opinion and Market Researchers» (KAPPOMR), Natalia Ospanova, presented the audience with unique analytical data that made it possible to answer the questions: is the population aging or getting younger, as well as make short- and long-term population forecasts for Central Asian countries.

«The Central Asian region is a region that is steadily growing in population. At the same time, Kazakhstan, Uzbekistan and Kyrgyzstan are the three fastest growing countries», - Natalia Ospanova shared the results of the analytics. «They have a fairly high birth rate and, accordingly, the fastest growing labor force. According to the UN forecast, by 2050 the population of Central Asia will exceed 100 million people».



CAF business conference expert: Natalia Ospanova, Director of the Alvin Market group of research companies and president of the Kazakhstan Association of Professional Public Opinion and Market Researchers (KAPPOMR)

The business conference expert said that today Central Asia is one of the youngest regions in the world in terms of average age. Thus, the average age of the average Central Asian resident is 28 years.

«It is also important that the countries of Central Asia as a whole are characterized by one of the highest levels of external migration. Accordingly, when calculated demographically, it shows a negative increase. Migration rates are highest in Uzbekistan, where more than 55 residents leave the country every day, according to this year's World Population Review. In general, Uzbekistan is the leader in the flow of migrants traveling abroad. Kyrgyzstan is in second place in terms of migration processes, where the country's adult, working-age population mainly migrates in search of work. As for Kazakhstan, over the past few years, migration processes in the country are still active, although in the opposite direction: entry into the country.



Slide from Natalia Ospanova's presentation. Gender and age pyramid of the Kazakhstan population

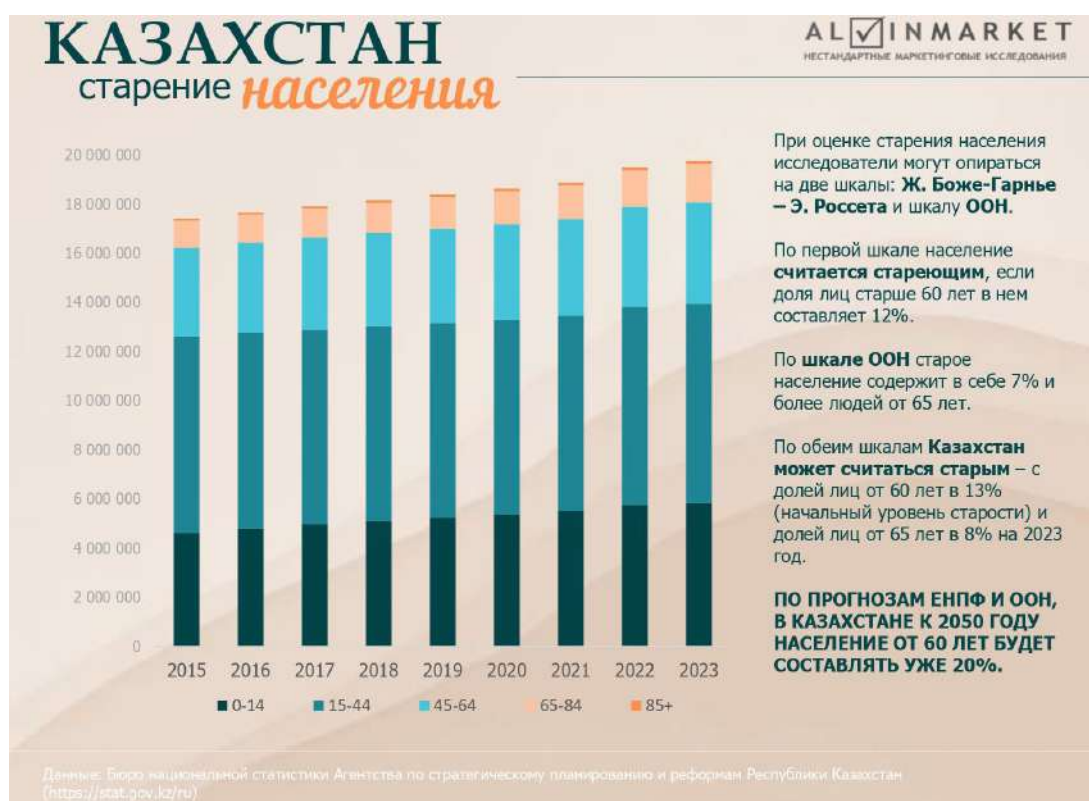
All three countries: Kazakhstan, Uzbekistan and Kyrgyzstan, despite some shocks and changes in the age and gender structure, belong to the progressive type of age structures. This is indicated by the triangle-shaped age pyramid: a large number of children are born, while the proportion of the older generation remains low. This

means that our pyramid is built in such a way that a large number of children are born, and the older generation is quite small in percentage terms relative to the total population».

Based on data presented by expert Natalia Ospanova, the number of people in the three Central Asian countries, according to analytical forecasts, will continue to grow over the next few decades. According to analysts' forecasts, a gradual slowdown in growth will only be observed by 2060. The slowdown trend, after a sharp increase, will be most noticeable for Uzbekistan. In general, from a demographic point of view, at the moment, the situation in the Central Asian region, according to the expert, is objectively considered favorable and conducive to economic growth.

«In the research, we refer to UN figures and forecasts, which we were interested in looking at and making an identical comparison with our neighboring countries. The slide clearly shows the gender and age pyramid as it is structured in Kazakhstan: the country's birth rate was low and migration processes intensified in the nineties and two thousand. But we see certain advantages in the future: life expectancy is to increase in Kazakhstan. In particular, for men, according to UN forecasts, by 2050 the figure will increase to 78 years, and women will live up to 84 years on average. If we look at the figures for Uzbekistan, the average life expectancy for men in this country is 71.7 years, and for women it is 75.8 years, which is noticeably lower than the indicators in Kazakhstan. But everything is learned by comparison, so if you look at the figures for Uzbekistan, the average life expectancy there is now even lower: for men it is 68 years, and for women it is 76.4 years».

Discussing the age characteristics of the three Central Asian countries, expert Natalia Ospanova noted that in general the population of Central Asia remains relatively young by demographic standards. However, if we talk only about Kazakhstan, then the country is already at the initial stage of aging, relative to our neighbors.



Slide from Natalia Ospanova's presentation. Aging population of Kazakhstan

«The population is aging mostly from above, that is, due to increasing life expectancy. On the slide we reflected what the forecast for population changes in Kazakhstan will be by 2070. There is a gradual attenuation of population growth, but I note that this is a forecast that will be possible if current development trends continue...

On the question of why Kazakhstan belongs to the category of aging countries at the initial stage. According to the UN scale, in Kazakhstan there are already about 12% of the population who are aged 60+. And according to the UN classification, 7% of the population at this age means that the country is at the initial stage of aging. Moreover, according to forecasts in Kazakhstan by 2050, the share of the population aged 60+ will already be 20%, which means that the natural demographic process of aging will only increase».

At the same time, the speaker of the business conference emphasized that the process of demographic aging is quite natural and is now most clearly manifested in well-developed countries.

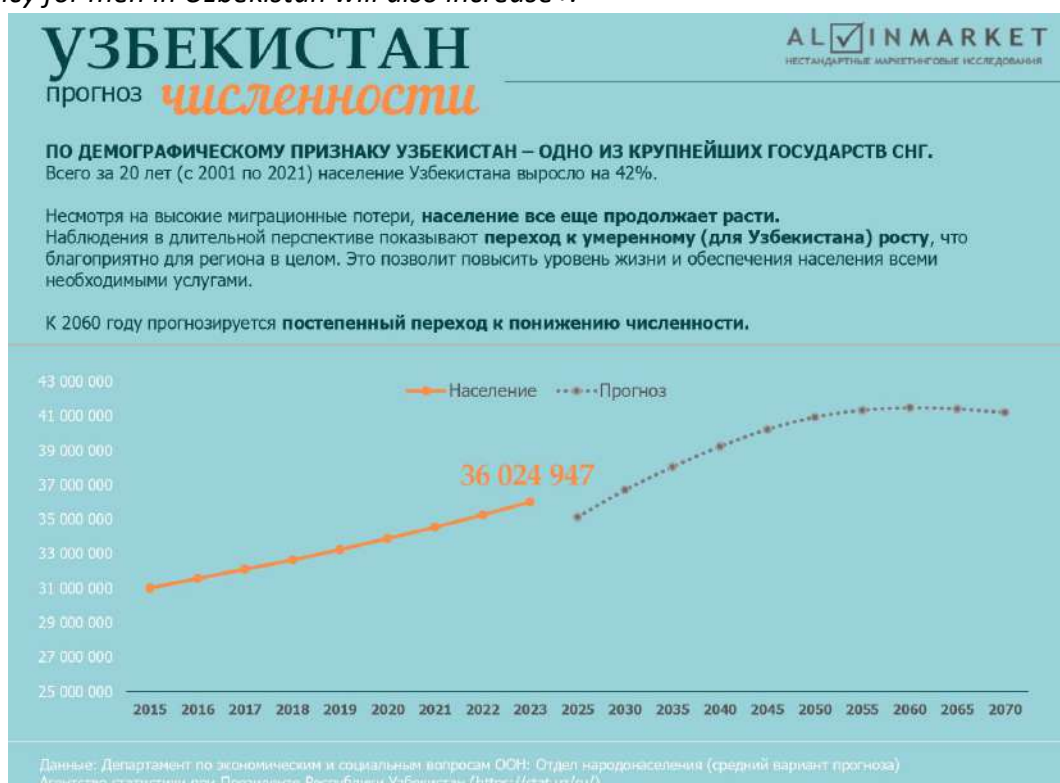
Summing up the demographic analysis of the Central Asian region, expert Natalia Ospanova emphasized the importance of such forecasts for business.

«I think these demographics are very important to consider when we make business or brand forecasts. Entrepreneurs must clearly understand what age audience they can count on next, how the country's population and its structure will change.



Slide from Natalia Ospanova's presentation. Kazakhstan population forecast

If you look at how the population dynamics in Kazakhstan will change and what it will be, you can see that over the past 10-15 years we have a stable situation in terms of fertility and mortality. It is a pleasant fact that there has been a decrease in infant mortality in Kazakhstan, as well as in all age groups in general. If we talk about the causes of mortality, then, basically, these are diseases more related to the blood circulatory system and respiratory organs. We also see that the difference between life expectancy for urban and rural residents is decreasing. However, if we turn to similar data from our neighbors from Uzbekistan and Kyrgyzstan, the picture will be completely different. For example, we see that Uzbekistan is now returning to its previous level of reproduction, and life expectancy for men in Uzbekistan will also increase».



Slide from Natalia Ospanova's presentation. Uzbekistan population forecast

In her speech, the expert noted that in terms of demographics, Uzbekistan is one of the largest countries in the CIS and the entire Central Asian region. Therefore, it always attracts a lot of attention in terms of new brands or investments. Even when the business characteristics of Kazakhstan are compared with Uzbekistan, Uzbekistan is

often a priority precisely due to its population. Despite the fact that there are quite active migration processes in Uzbekistan, it still continues to grow in number and belongs to fairly young states. At the same time, it is clear that Uzbekistan will gradually achieve moderate growth.



Slide from Natalia Ospanova's presentation. Kyrgyzstan population forecast

«Our neighbor Kyrgyzstan has its own demographic picture, different from the previous ones. In terms of average statistical age, the country is in a period of youth, so we are seeing a certain increase in the birth rate. It is still accepted there that there are three or four children in a family. And this, accordingly, affects the increase in the population as a whole. Migration processes are also observed there and the working-age population is leaving the country, which generally affects the average age of the population. However, as can be seen from the scale, Kyrgyzstan will also reach its slowdown in population growth only by 2060.

We see that the way of life in the country is gradually changing. Accordingly, various benefits become available, infrastructure develops, and all this affects the growth in the life expectancy of the population as a whole».



Speakers of the panel discussion «Glocalization of Central Asia» (from left to right):
Evgeniy Skuratov, Natalia Ospanova, Svetlana Chernenko, Milena Ershova, Aigul Kasymova, Zalkar Askarali Uulu

Summing up the demographic analysis of the Central Asian countries and summarizing the forecast of population size and gender and age pyramid, moderator of the panel discussion, Milena Ershova, figuratively called the three countries a large Central Asian family, in which Kazakhstan is the older «brother», Uzbekistan is little younger and the youngest and most beloved is Kyrgyzstan.

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