



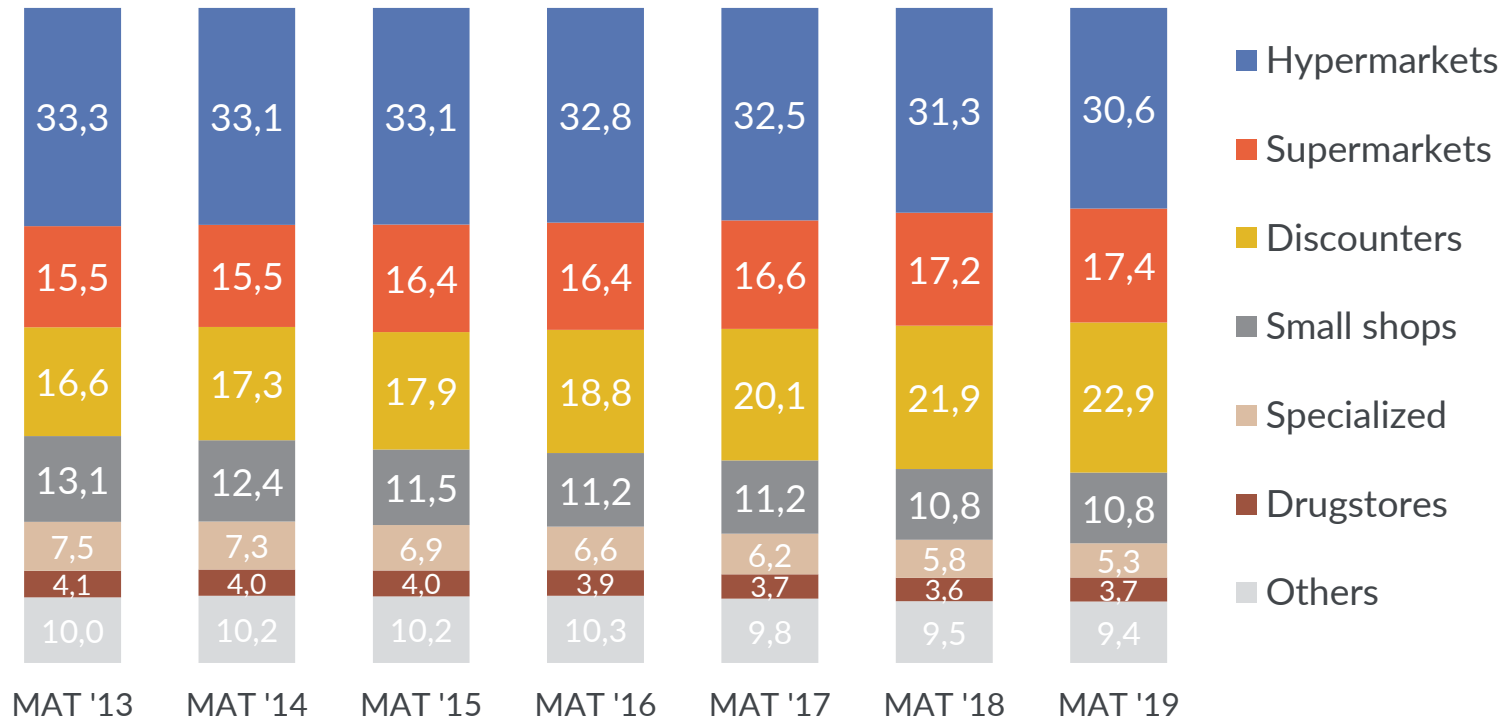
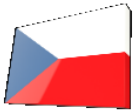
Od pultu k mobilu, a co dál? Vývoj nákupních zvyklostí zákazníka

Ladislav Csengeri, Consumer Panel & Services Director CZ&SK, GfK

13.November 2019, Praha

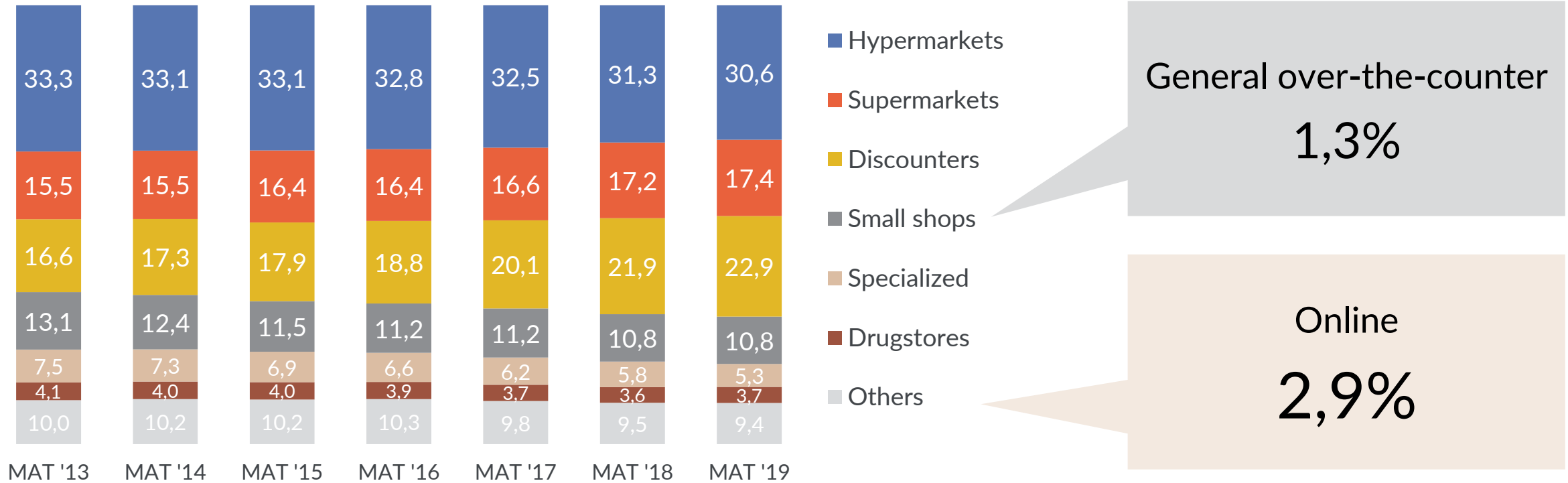
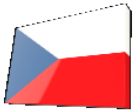
More modern and convenient formats

...in the form of discounters



More modern and convenient formats

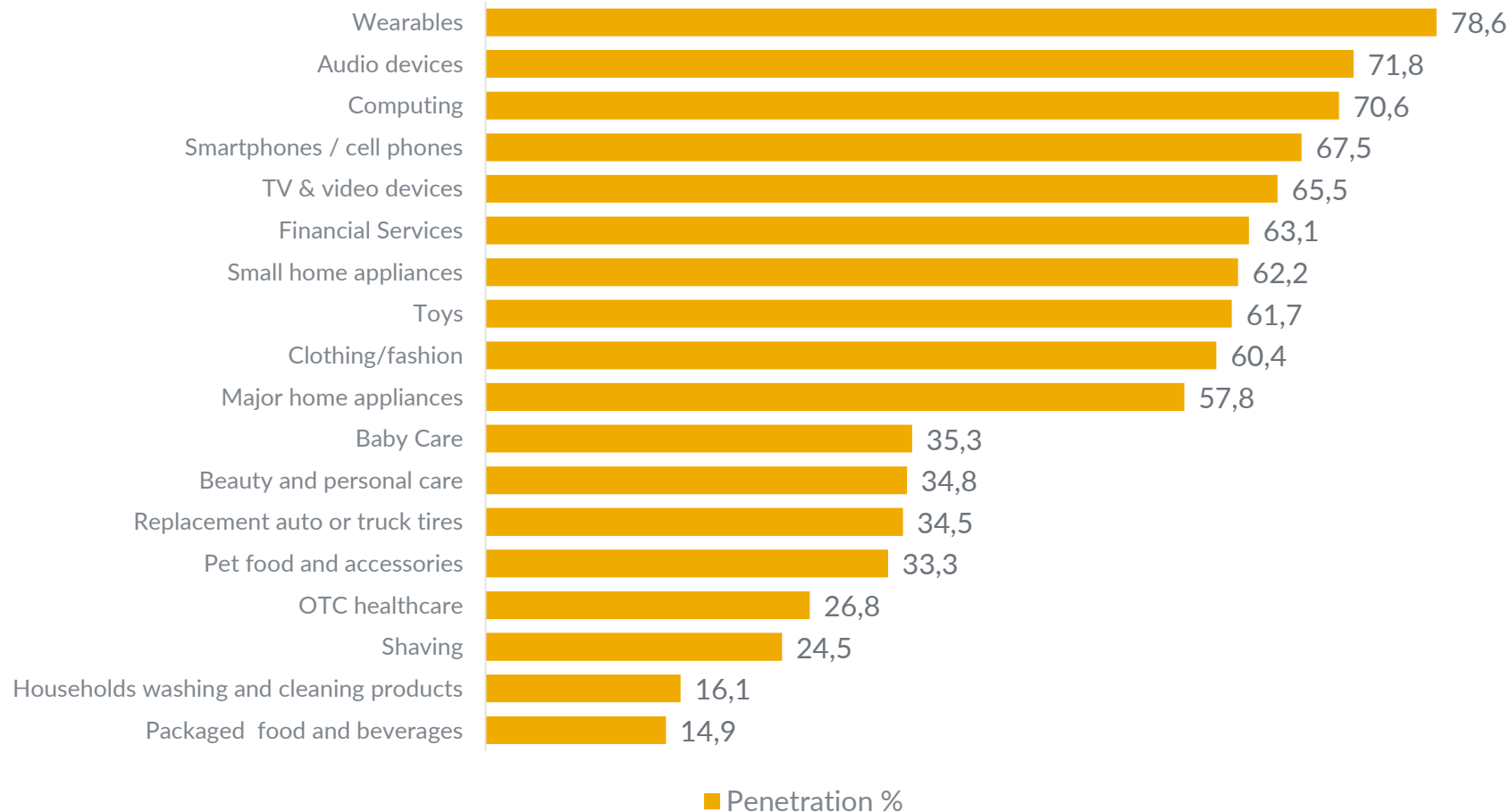
...in the form of discounters



The background of the slide features a long-exposure photograph of a city at night, with light trails from cars on a highway in the foreground. Overlaid on this are several diagonal streams of glowing blue and white binary code (0s and 1s) that sweep across the frame from the bottom left towards the top right, creating a sense of digital flow and connectivity.

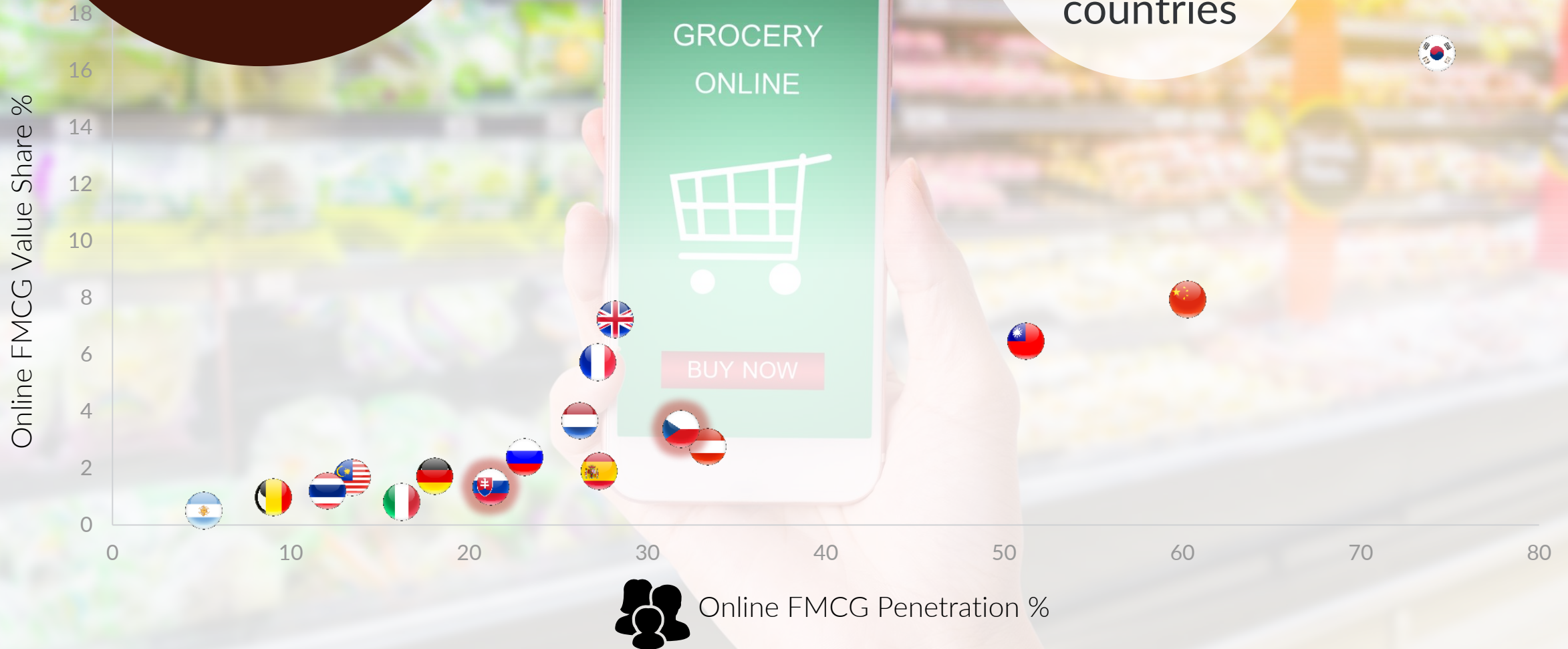
Digitalization & Connected

What do we buy online?



Asia leads
FMCG
e-commerce

CZ
penetration
high
amongst EU
countries



Online purchases of FMCG



Penetration
30%



Frequency
10x



Market Share
2,9%



Repeat Rate
68%

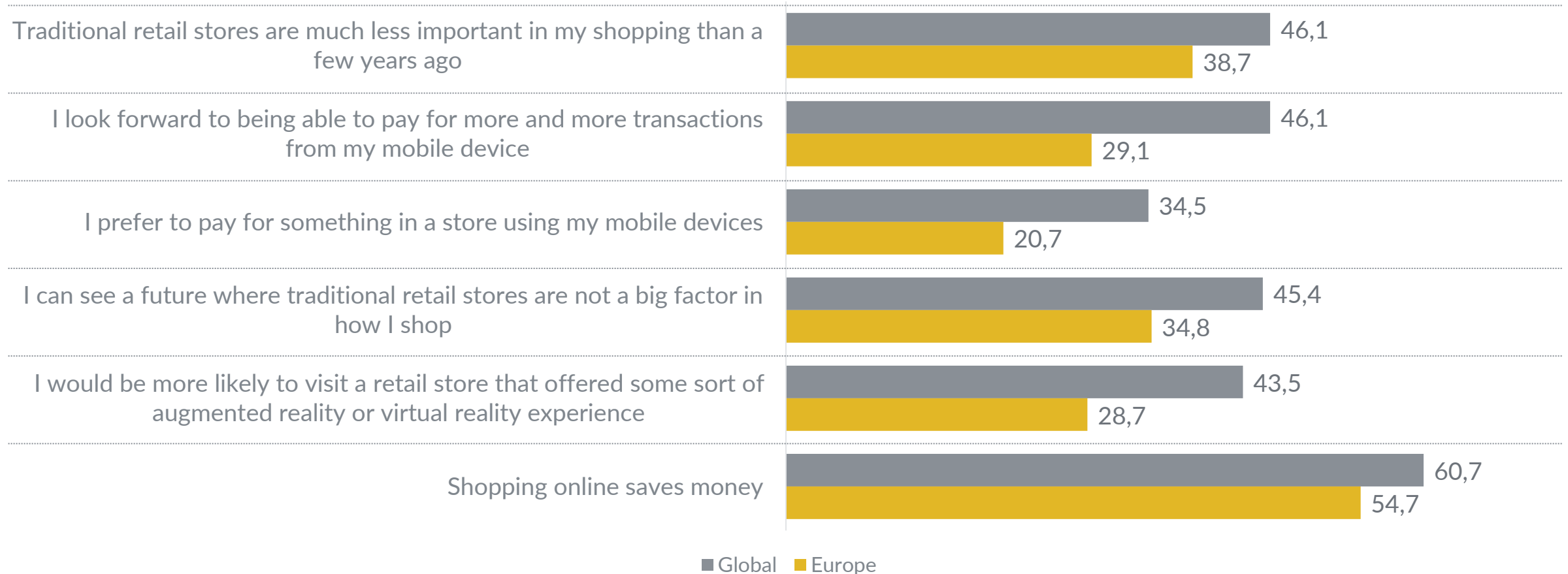


Value per Trip
832 Kč



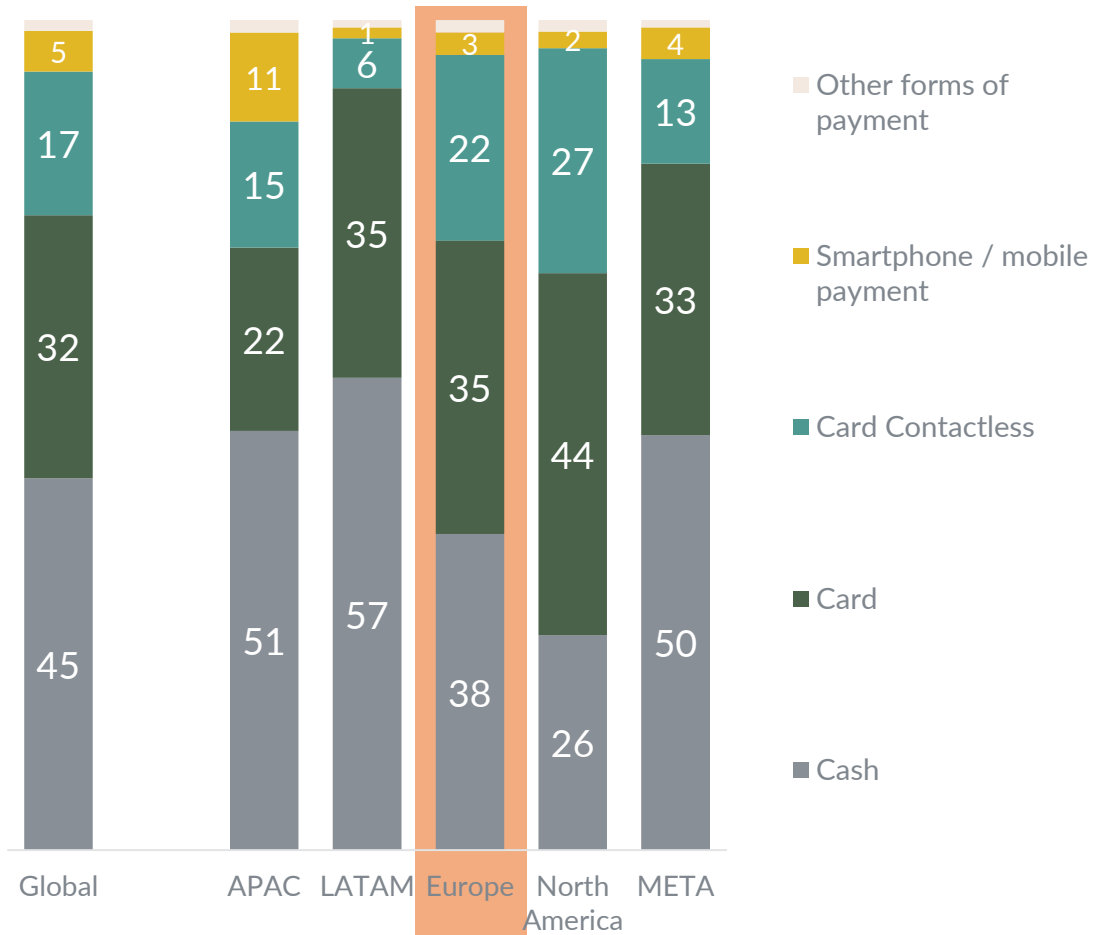
Loyalty
8%

Europeans are more traditional than global shoppers...

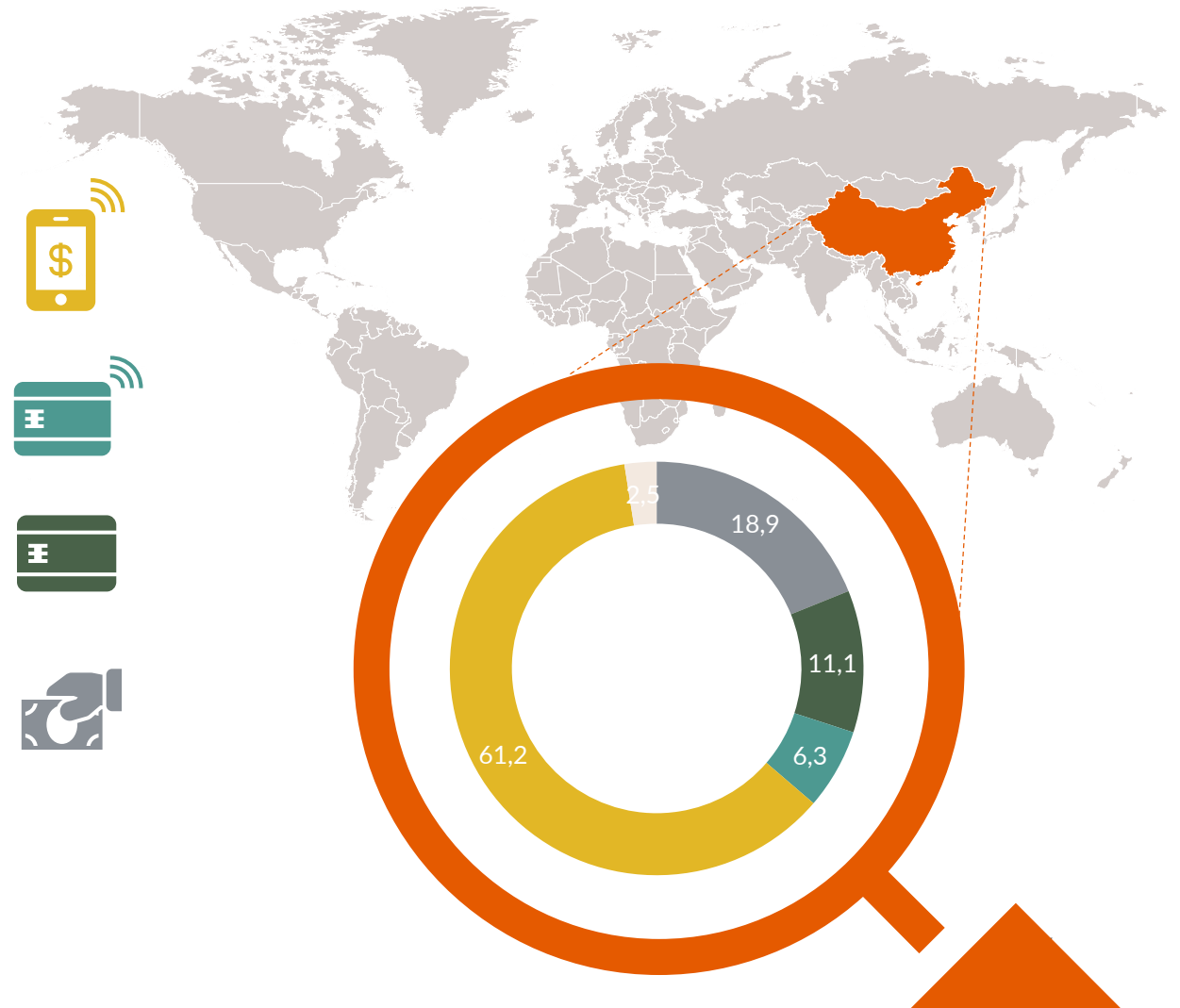


We prefer to pay with cards for our shopping

Payment forms (packaged grocery and beverages)



Source: GfK FutureBuy 2018



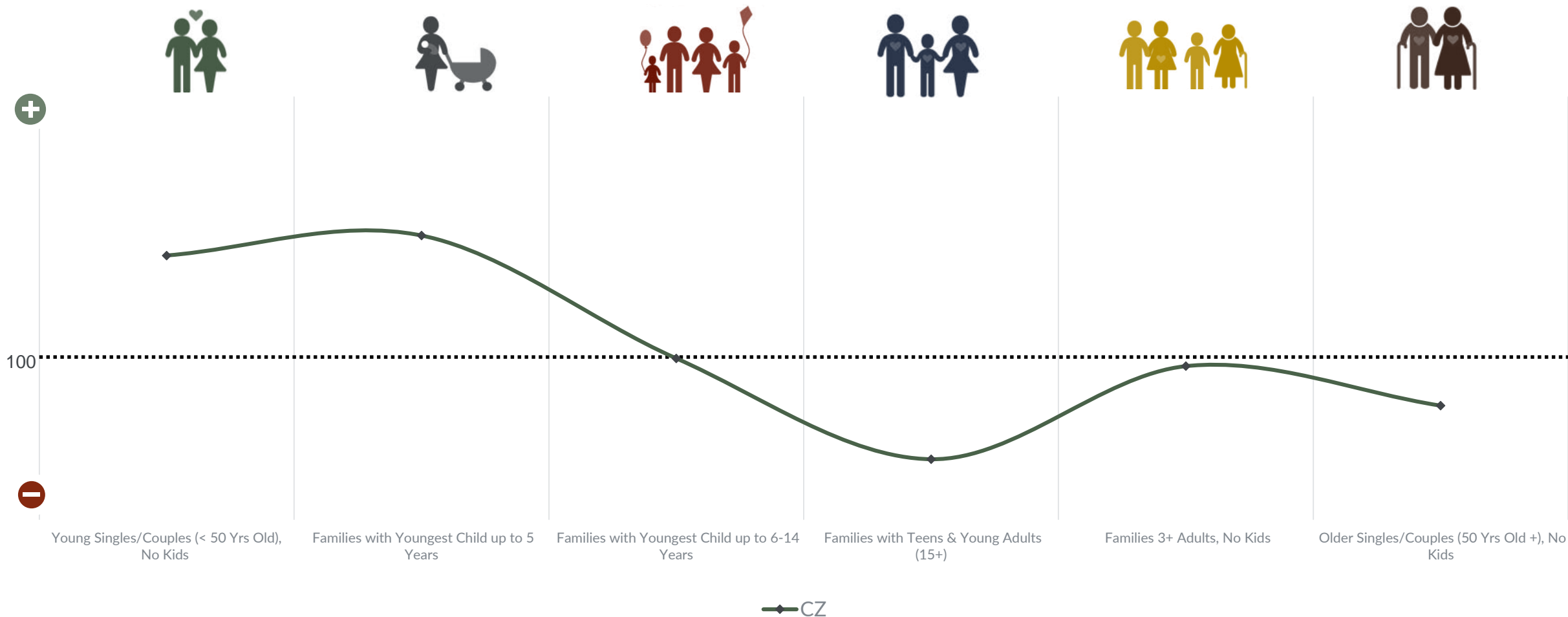
BEGGARS IN CHINA GO CASHLESS



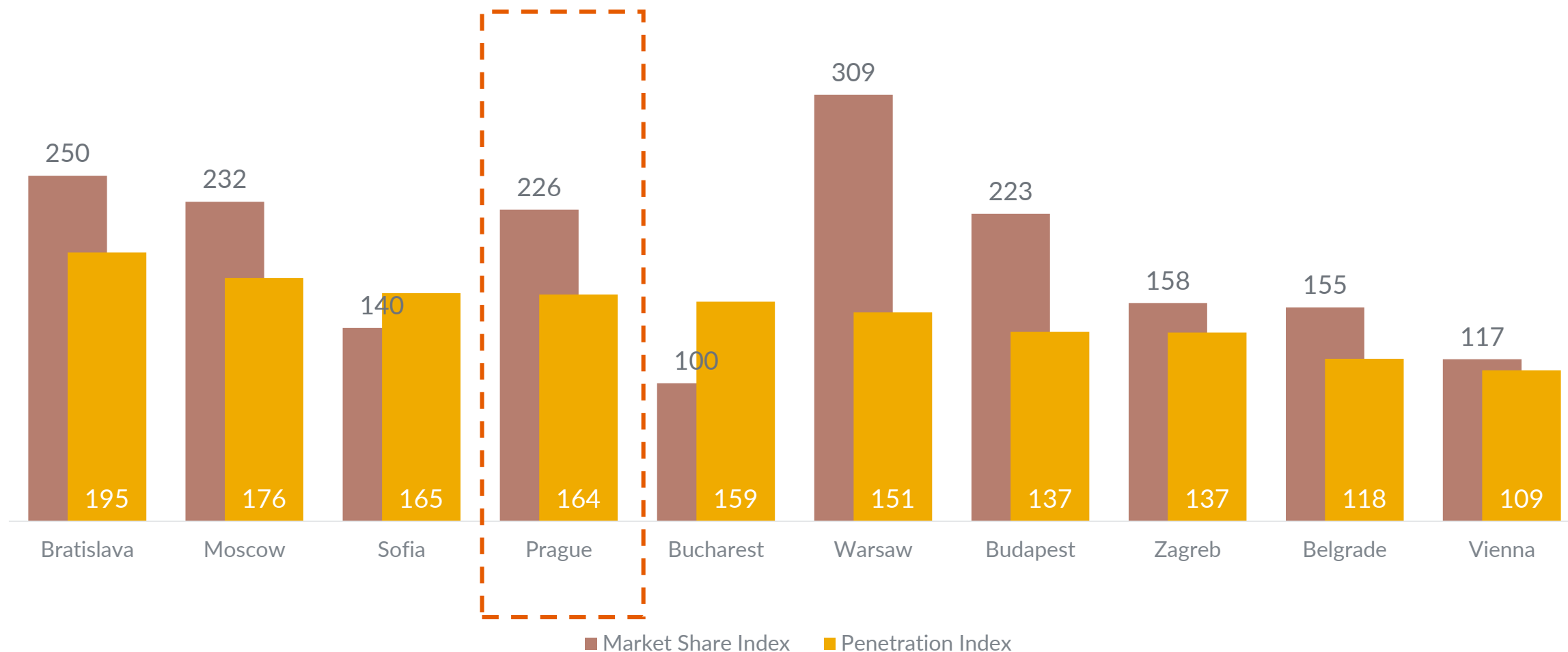
...and if we don't buy online, it's because



FMCG online typical for younger shoppers



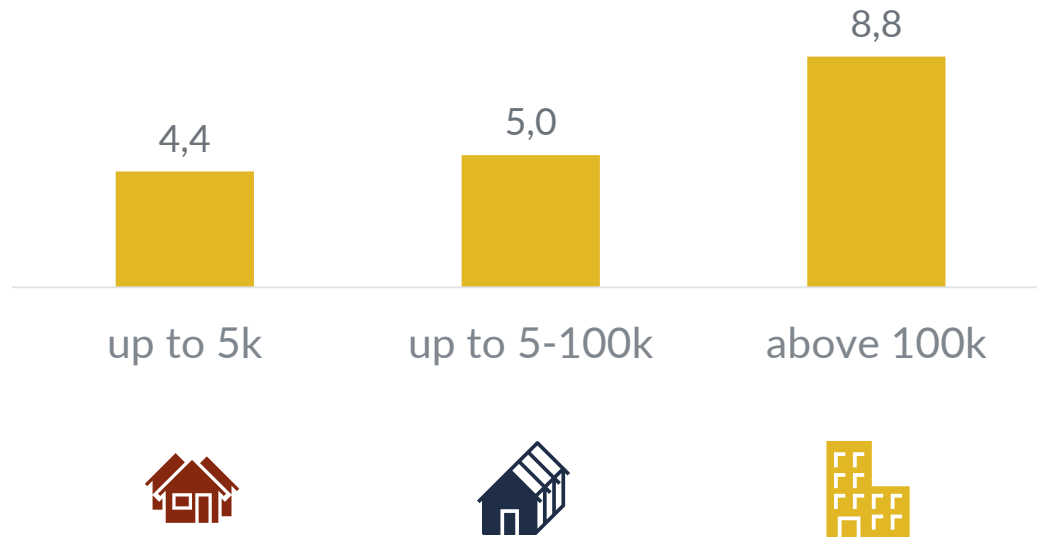
Big cities including capitals are driving the FMCG online shopping



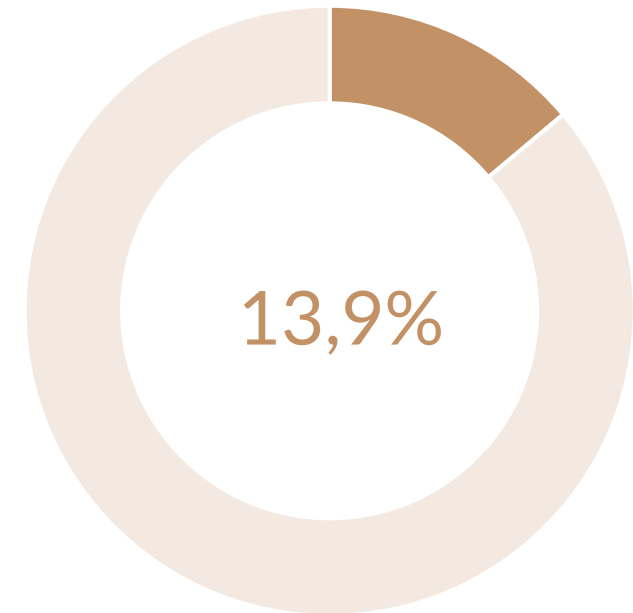
For certain target groups, online has become a substantial shopping channel



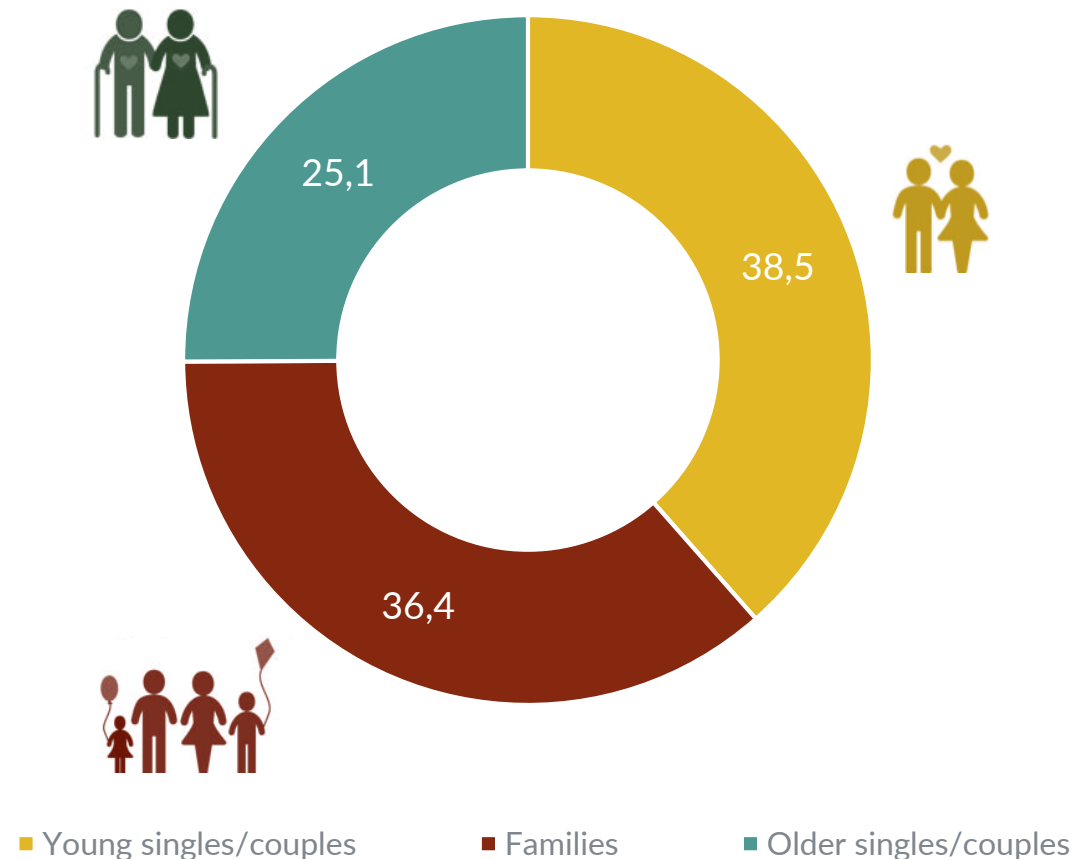
Share of Online within Young S/C



Young S/C in big cities who shop FMCG online



In the last 5 years, all types of shoppers contributed to online sales growth, regardless of age



Contribution to growth of online FMCG sales by target groups MATJune2019 vs MATJune2015

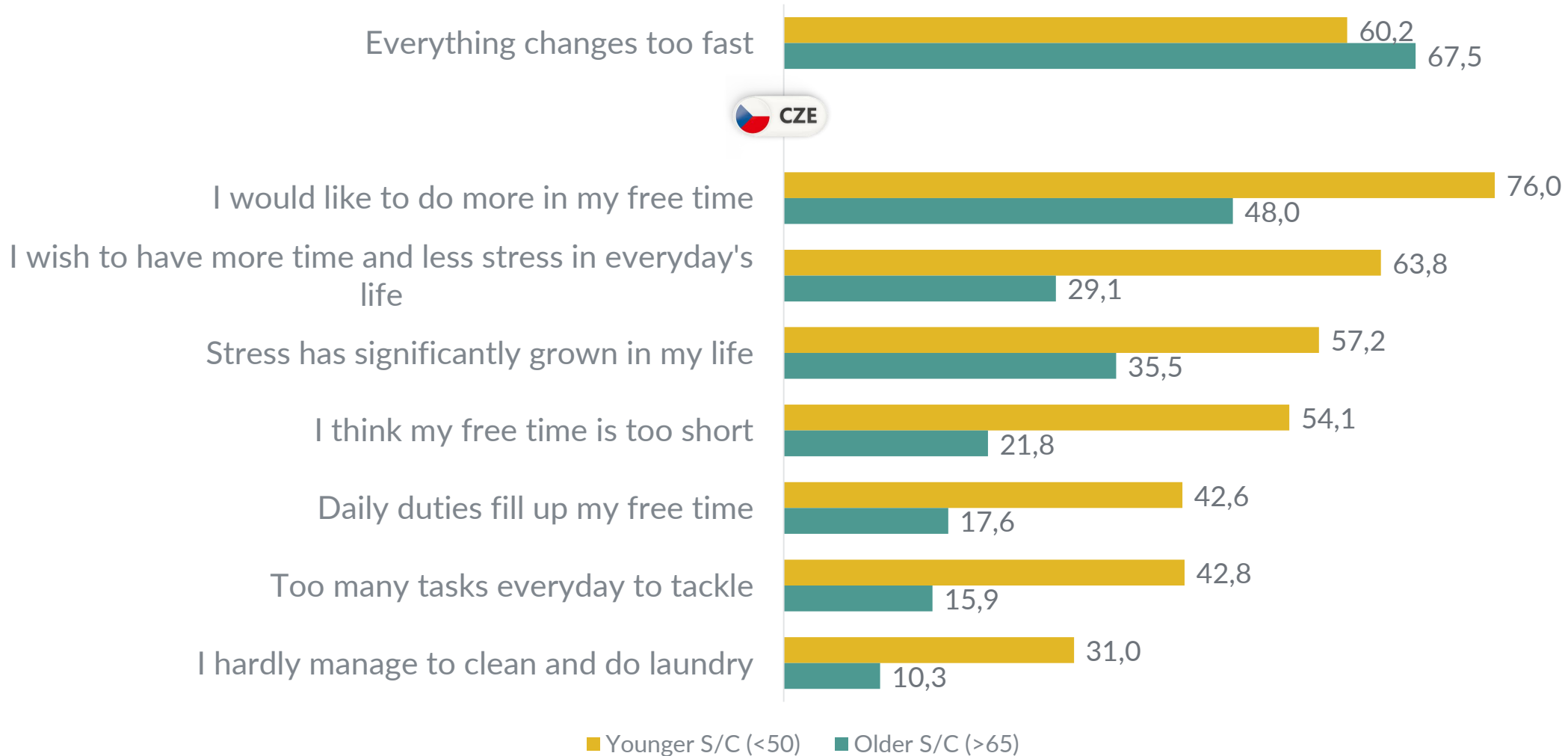


A woman with blonde hair is reclining on a plush, ornate sofa. She is wearing a dark blue dress with a teal polka-dot skirt, white socks with red and blue stripes, and white high-heeled sandals. She is looking thoughtfully to the side with her hand near her chin. The sofa has a gold-colored patterned fabric and a dark wood frame.

Convenience & Time

Role of time

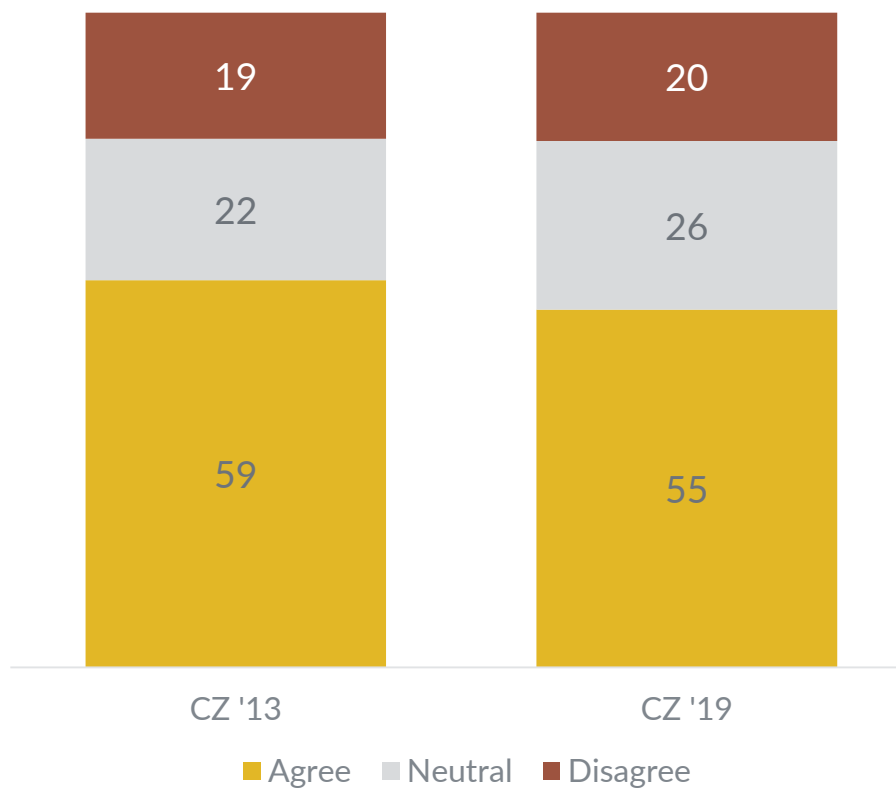
Time and its perception determines almost all aspects of our lives



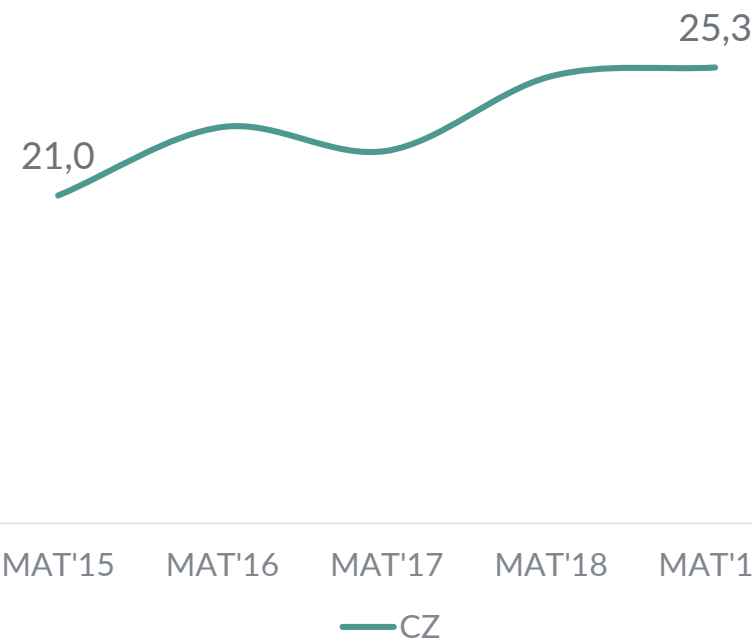
... and our shopping behaviour



I shop around to get better deals



Willing to pay somewhat more if saving time when shopping

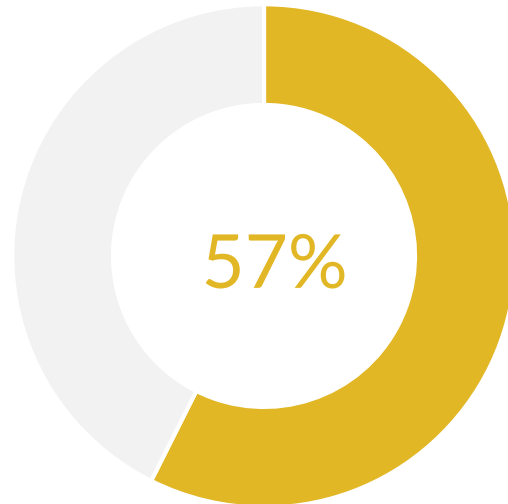


... and our shopping behaviour

More than half in both countries are either planning upfront or making quick decisions at POS

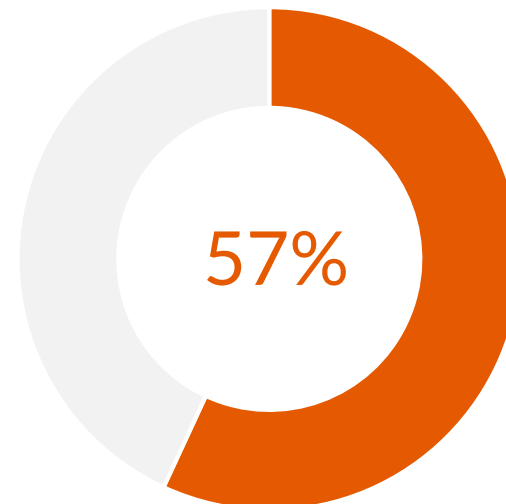


Plan shopping upfront to
save time



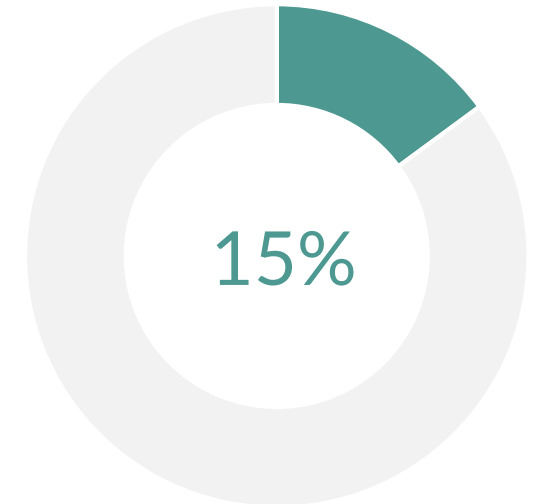
Make quick decisions
@POS

Young S/C, Families with kids up to 14yo



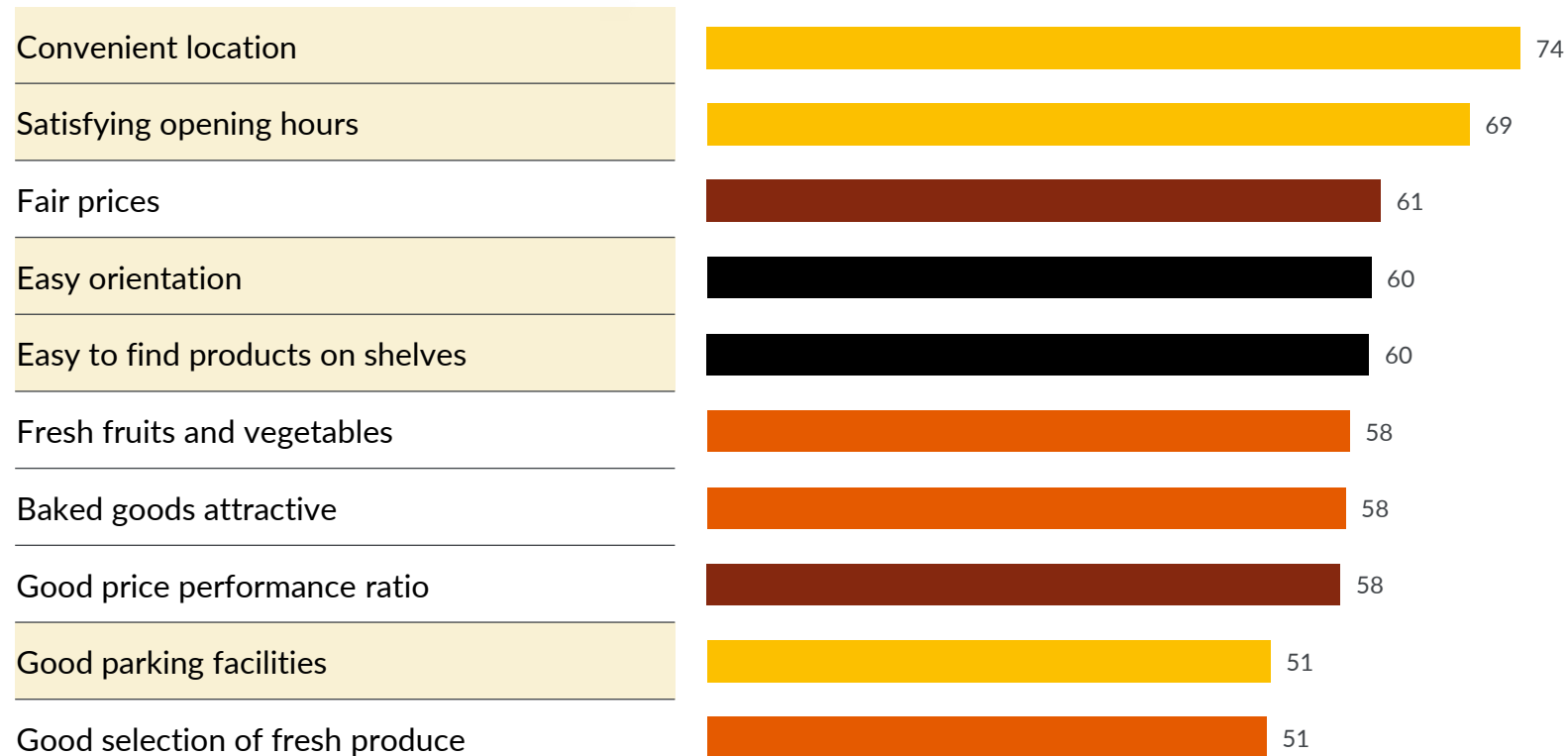
Always under time pressure
when shopping

Young S/C, Families with kids up to 14yo




Criteria for choosing a shopping place

5 out of TOP10 criteria are related to convenience



- Atmosphere
- Assortment
- Services
- Orientation
- Price positioning
- Availability & Range
- Private labels
- Social responsibility

A photograph of a person's torso and arms in a market setting. They are wearing a maroon cardigan over a white t-shirt and brown trousers with a colorful polka-dot belt. They are holding a bunch of green asparagus in their left hand and a small white receipt or card in their right hand. The background is filled with various fresh vegetables like tomatoes, eggplants, and leafy greens, slightly out of focus.

Shoppers' concerns when buying FMCG

Besides country of origin, shoppers tend to look at nutritional information.






TOP INFORMATION PEOPLE LOOK AT WHEN BUYING FOOD



Fat content	53%
Sugar content	50%
Preservatives	42%
Contains palm oil	34%
Calories / nutritional value	29%
Salt content	28%
Quality guarantee	21%
Vitamin content	18%
Fibre content	16%
Organic/bio quality or stamp	15%

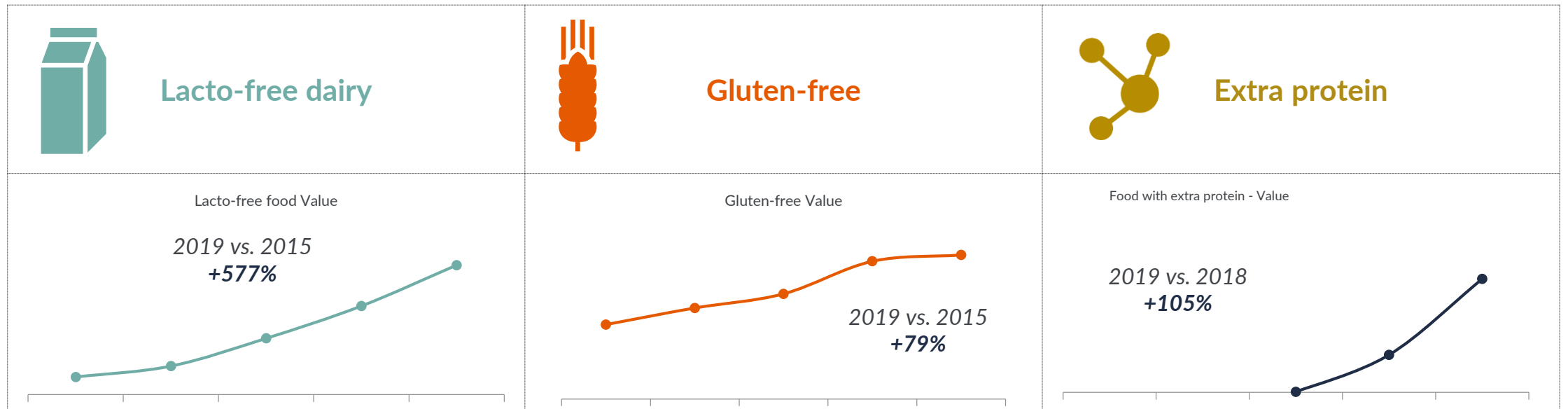
More health issues and intolerances within the last 5 years



 Lactose Intolerancies Alergies	 Gluten Intolerancies Alergies	 Diabetes
+39%	+137%	+21%

Number of households with at least one member in the household (comparing 2019 vs 2015)

...and actual purchases are confirming the trends
within the last 5 years



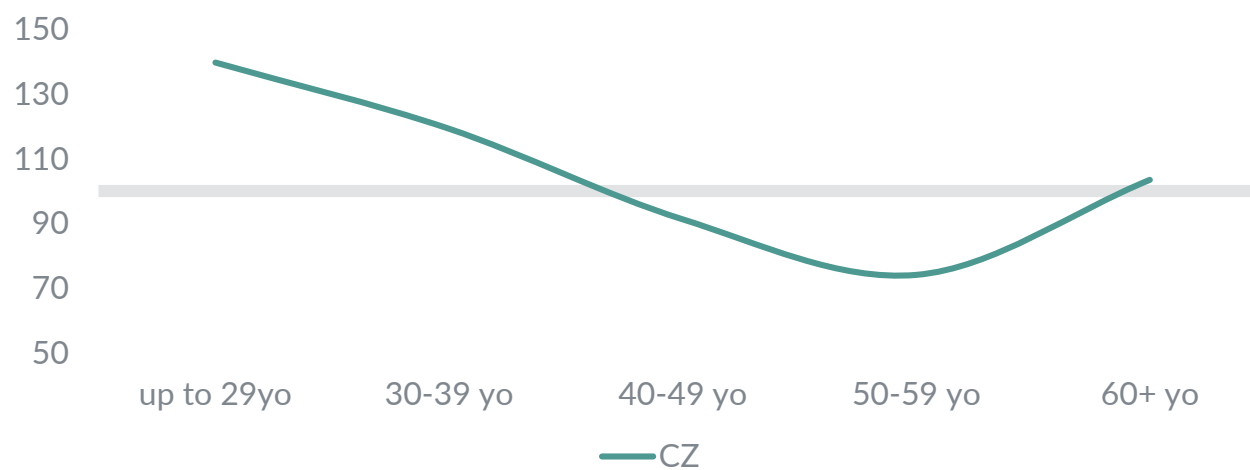


Smartphone vs. Wallet

It's worse to lose my smartphone than my wallet



Agree Neutral Disagree



A hand holds a tablet from which a glowing bar chart and line graph emerge. The chart features blue and orange bars, with a white line graph and a large white arrow pointing upwards and to the right. The background is dark with golden particles.

Thank you

GfK. Growth from Knowledge