

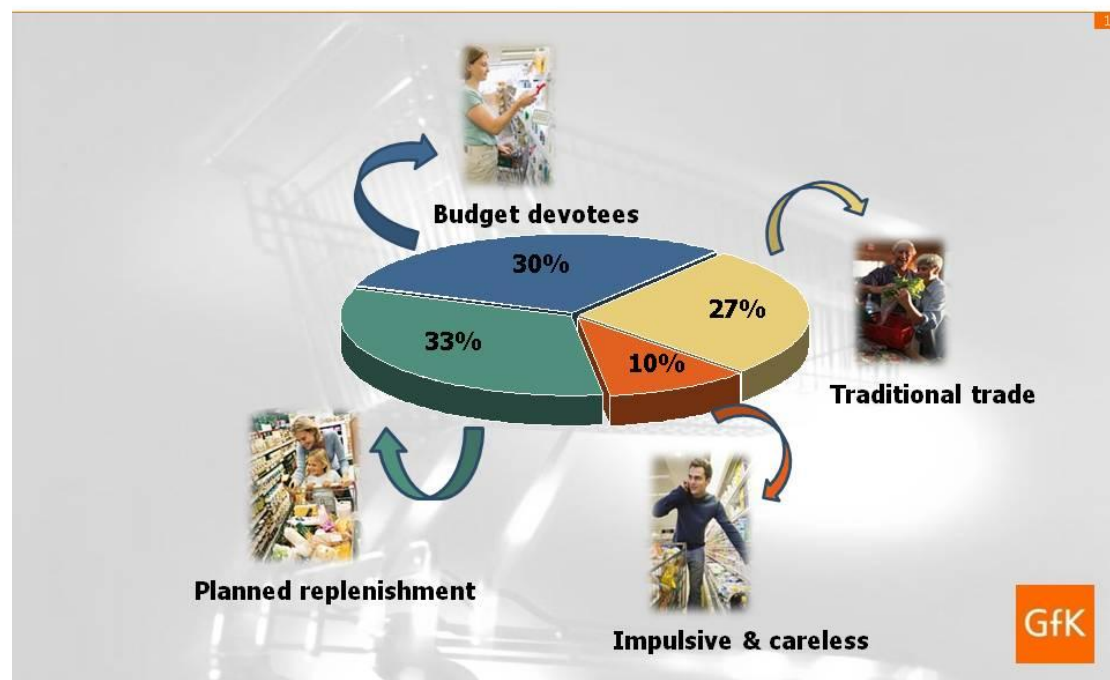
Serbia

Who are the shoppers in Serbia?

In the Shopping Monitor 2009 survey, special attention was paid to the analysis of shopper segmentation. The aim of the research was to follow certain selected patterns of popular shopping behaviours, such as shopping habits, customer satisfaction with shopping conditions, consumer preferences and awareness of retail chains.

When it comes to the Serbian market, there are four types of consumer segment: "**Planned replenishment**", "**Budget devotees**", "**Traditional trade**" and "**Impulsive & careless**". The Planned replenishment segment is the biggest (33%), followed by the Budget devotees with 30% and Traditional trade with 27%. The Impulsive & careless constitute the smallest segment at 10% of Serbian shoppers.

Shopper Segmentation Proportions of the various segments



The typical **Budget devotee** is very price sensitive. They behave rationally while shopping, adhering to a shopping list which was carefully prepared within the family at least one day before shopping. They usually go shopping with family members and buy a lot of products at once in order to build up stocks. They do not like to try new products. Additional services are important to them and they are interested in collecting points, loyalty schemes/cards and price discounts.

The representatives of the **Traditional trade** group are usually people over 60 years of age who come from single households. They mostly shop in small, "friendly" local stores. Pleasant personnel, acceptable price levels and the freshness and quality of the products are the things which are of importance to them. A typical member of this segment does not find it important to collect points, have loyalty schemes/cards or to pay with a payment card. Their usual time for shopping is in the morning.

The members of the **Impulsive & careless** segment do not really care about the amount of money they spend on shopping, they buy things in a hurry. Their behaviour is anything but rational, usually buying more goods than they really need. For the most part, the segment comprises men from urban areas, with a high level of education and a high income, so it is to be expected that the payment card is their preferred choice of payment. Price discounts and other promotional discounts are not considered important.

The members of the largest segment, **Planned replenishment**, usually go shopping with their entire family. They use previously compiled shopping lists as a guideline, but they also buy some items impulsively. Whilst doing their shopping they try to find the best price/quality ratio. The representatives of this segment usually spend more money per single shop than the average consumer (but less than the "impulsive & careless" shopper). They pay attention to assortment range and the external appearance of the store.

In terms of where most of the FMCG budget is spent, the situation varies from segment to segment. **Budget devotees** usually go shopping in supermarkets, because they perceive them to be the place with the most reasonable prices. **Traditional trade** segment shoppers shop at mini-markets and L&T, because they need a "warmer" atmosphere. The **Impulsive and careless** spend most of their money at the supermarket (with the most frequently visited chain being Mercator), because there they can find everything they need and so do not have to waste too much time on shopping. And, finally, the **Planned replenishment** group are most often to be found in various Cash & Carry markets, such as Univerexport and Tempo.

Segmentation

Comparative overview of selected aspects

	Main retail type (where most of FMCG budget is spent)*	Main retail chain (where most of FMCG budget is spent)*	Average amount of money spent on large shopping trip	Average amount of money spent on regular/usual shopping trip
Segment 1 Budget devotees Size : 30%	SUPERMARKET + L&T -	Mercator - L&T -		-
Segment 2 Traditional trade Size : 27%	HYPERMARKET - SUPERMARKET - MINI MARKET + L&T + CASH & CARRY -	L&T + Univer Export - Maxi - Mercator -	-	
Segment 3 Impulsive & careless Size : 10%	HIPERMARKET + SUPERMARKET -	Mercator +	+	+
Segment 4 Planned replenishment Size : 33%	MINI MARKET - L&T - CASH & CARRY +	Tempo + Univer Export + L&T -	+	

*Compared to all segments average:
+ statistically higher than average
- statistically lower than average



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