



Press release

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Loyalty of Slovak consumers toward retail chains has increased

Bratislava – 29 July 2009 – Slovak consumers' loyalty to retail chains has increased in Q1 2009, a different trend to their counterparts in the Czech Republic. Despite the fact that overall purchasing intensity is down and Slovak shoppers have started to keep an eye on their expenditures much more than in the past, they still remained loyal to 'their' traditional retail chains and carried out larger purchases under one roof. These are some of the findings of the most recent analysis carried out by the household panels of GfK Slovakia and GfK Czech . This research tool enables continuous monitoring of all purchases of packaged FMCG goods in all types of stores. The analysis also found that retail business in both countries differs to a great extent.

Slovaks didn't change their shopping habits very much and continued to focus on larger purchases conducted at a lower frequency. In the past 10 years, Slovak consumers are gradually diverting from smaller retail formats and according to the current trend, they tend to spend most of their food and standard consumer-goods expenditures in modern retail formats, i.e. in **hypermarkets** and **discounts**, although traditional formats such as supermarkets and small stores continue to play an important role.

In the neighbouring Czech Republic, a different phenomenon has started to emerge – people tend to visit several stores during the month, where they carry out smaller and more frequent purchases in order to look for the best deal. However, the Slovak market differs from the Czech one as Slovak consumers don't have such a good choice when it comes to retail chains and therefore they can't apply this policy to the same extent as their Czech counterparts.

Besides the impact of the crisis, in the past months, Slovak retailers had to cope with a drain of shoppers abroad due to the strong euro. Therefore they intensified their marketing communication and re-considered their loyalty schemes. In general, they strived not to lose their customers and to maintain their purchasing habits. For example, COOP Jednota has been



running its own loyalty program for a considerable time, while Billa is currently re-evaluating its own scheme and Tesco has just launched a trial version of its program in selected towns across eastern Slovakia.

On the contrary, in Q1 2009 the neighbouring Czech Republic saw a one-off decrease in loyalty to all major retail chains in a year-on-year comparison. Even the most successful players in the Czech market gained less than one fifth of the total volume of relevant expenditures of their customers. Czech retailers are therefore trying to attract buyers to make bigger shopping in their chains. Still, loyalty to Czech and Slovak retail chains fails to reach the levels of more developed European countries.

Loyalty is the most important factor influencing retail success as it significantly drives retailers' market share. The analysis also disclosed that Slovak and Czech retailers still have opportunities for further development of knowledge and tools in the field of CRM and loyalty management. This topic will also be the highlight of the ***Retail in Detail - Loyalty over Gold*** conference taking place on **30 September 2009 in Prague** where this unique analysis of (dis)loyalty of consumers in the Slovak and Czech retail market shall be presented.

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GfK Slovakia

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