

GfK Roper Reports

International study of values
and lifestyles

GfK UKRAINE
2009





GfK Roper Reports

General information

GfK Roper Reports: General information

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Consumers differ too much – some of them believe that family life is the most important, others – recreation, and the rest share an opinion that it's work which is the most significant. Every consumer has personal lifestyle, values and consumer preferences.

Within the segments with a similar socio-demographic structure one can find out people with very differing value orientations and consumer behaviour. Understanding of these basic values is the pillar for successful marketing activity.

IF YOU WANT:

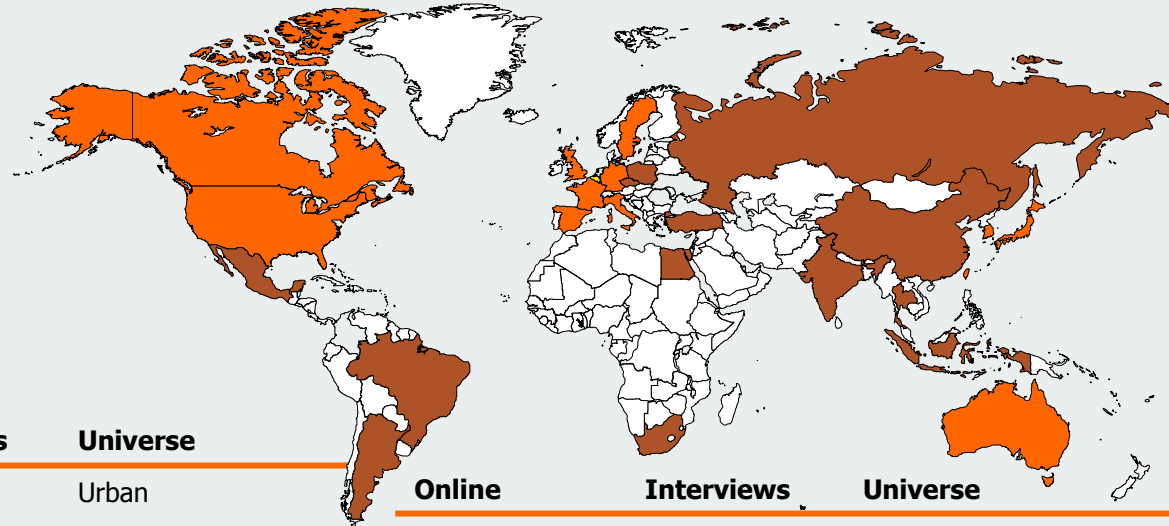
- To better understand a Ukrainian consumer comparing to the European Union, Russian and the whole world consumers
- To learn value orientations of consumers and their preferences in terms of consumption
- To define the optimum communication strategy with your consumer

THEN THIS RESEARCH IS FOR YOU!

RRW 2009 Core Study Methodology: 30,000+ Interviews with Consumers Age 15+ in 25 Countries

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- In-person (urban population)
- Online (regular Internet users)



In-person	Interviews	Universe	Online	Interviews	Universe
Czech Republic	1000	Urban	Canada	1500	National – Regular Internet users
Poland	1000	Urban	France	1500	National – Regular Internet users
Russia	1500	Urban	Germany	1500	National – Regular Internet users
South Africa	1000	Urban	Italy	1500	National – Regular Internet users
Turkey	1000	Urban	Spain	1500	National – Regular Internet users
Argentina	1000	Urban - SES exclusion	Sweden	1500	National – Regular Internet users
Brazil	1500	Urban - SES exclusion	UK	1500	National – Regular Internet users
China	1500	Urban - SES exclusion	USA	1500	National – Regular Internet users
Egypt	1250	Urban - SES exclusion	Australia	1500	National – Regular Internet users
India	1500	Urban - SES exclusion	Japan	1500	National – Regular Internet users
Indonesia	1250	Urban - SES exclusion	South Korea	1500	National – Regular Internet users
Mexico	1000	Urban - SES exclusion	Taiwan	2000	Urban – Regular Internet users
Thailand	1000	Urban - SES exclusion			

Roper Reports Worldwide in Ukraine

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**Ukraine was covered in 2007 and 2009:
Fieldwork was conducted in Jan-Feb 2007 and in Jan-Feb 2009
The second wave report: May 2009**



Sample size: 1,000 respondents
Interview duration: 1-hour+
2007
Respondents' age: 13+
Coverage: cities 500 000 +
(Kyiv, Kharkiv, Dnepropetrovsk, Odesa, Donetsk, Zaporizhzhya, Lviv, Kryvyy Rih, Mykolayiv).
2008
Respondents' age : 15+
Coverage: urban population of Ukraine

Understanding of trends

Questions answered by GfK Roper Reports

*In - d e p t h
understanding of
consumers, their
values, lifestyle
and behaviour*

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1. Value Orientations

What values are the most important for consumers? What changes in value orientations occur?

2. Consumer Segmentation

What consumer segments are there in Ukraine? What is their size? Who are they? What are their values and lifestyle? Consumption?

3. Leisure Time and Lifestyle

How do the Ukrainians spend their free time? Structure? Changes? What are their interests?

4. Consumer Behaviour

What things do consumers consider while choosing products? What is their attitude to different product categories? Usage?

5. As well as ...

Attitude to social problems, economy, politics, ecology, etc.

GfK Roper Reports: Could be applied at all stages of marketing activity

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IDENTIFICATION OF STRATEGIC TARGET GROUPS

BRAND POSITIONING

INCREASING CONSUMER LOYALTY

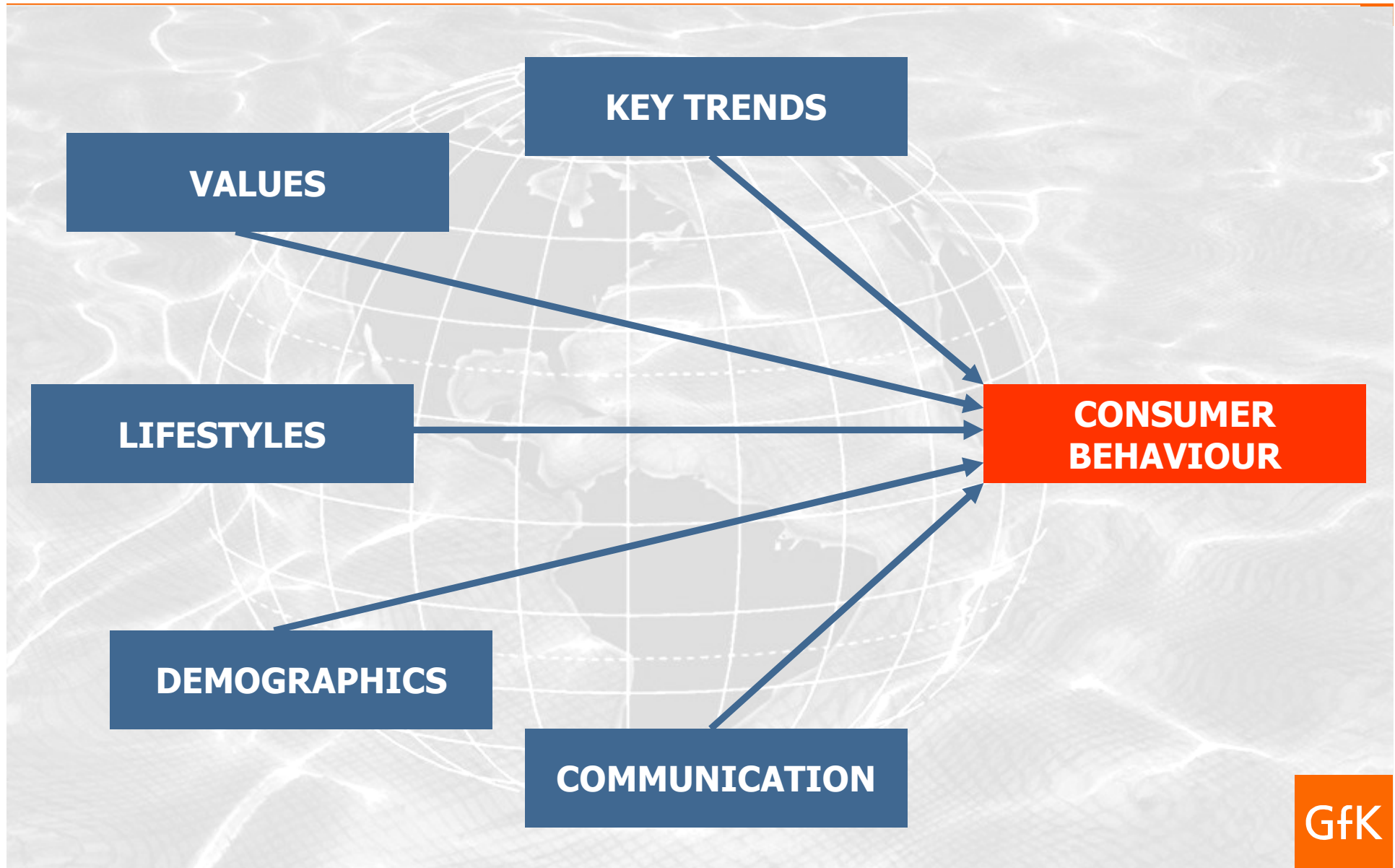
**DEVELOPMENT OF THE CONCEPT AND
PACKAGE FOR A NEW PRODUCT**

**DEVELOPMENT AND OPTIMIZATION OF
COMMUNICATION**



How do values determine consumer behaviour?

GfK Roper Reports: values, lifestyle, demographics... and their influence on consumer behaviour



How values define the dimensions/value types

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Achievement



Wealth
Status
Power
Ambition
Self-interest
Looking good

Tradition



Tradition
Traditional gender roles
Respecting ancestors
Faith
Cultural purity

Survival



Thrift
Modesty
Working hard
Simplicity

Nurturing



Stable relationships
Helpfulness
Protecting family
Friendship

Hedonism



Excitement
Being youthful
Having fun
Enjoying life

Social-Rational



Social responsibility
Social tolerance
Equality
Open-mindedness
Learning
Knowledge

Self-Direction



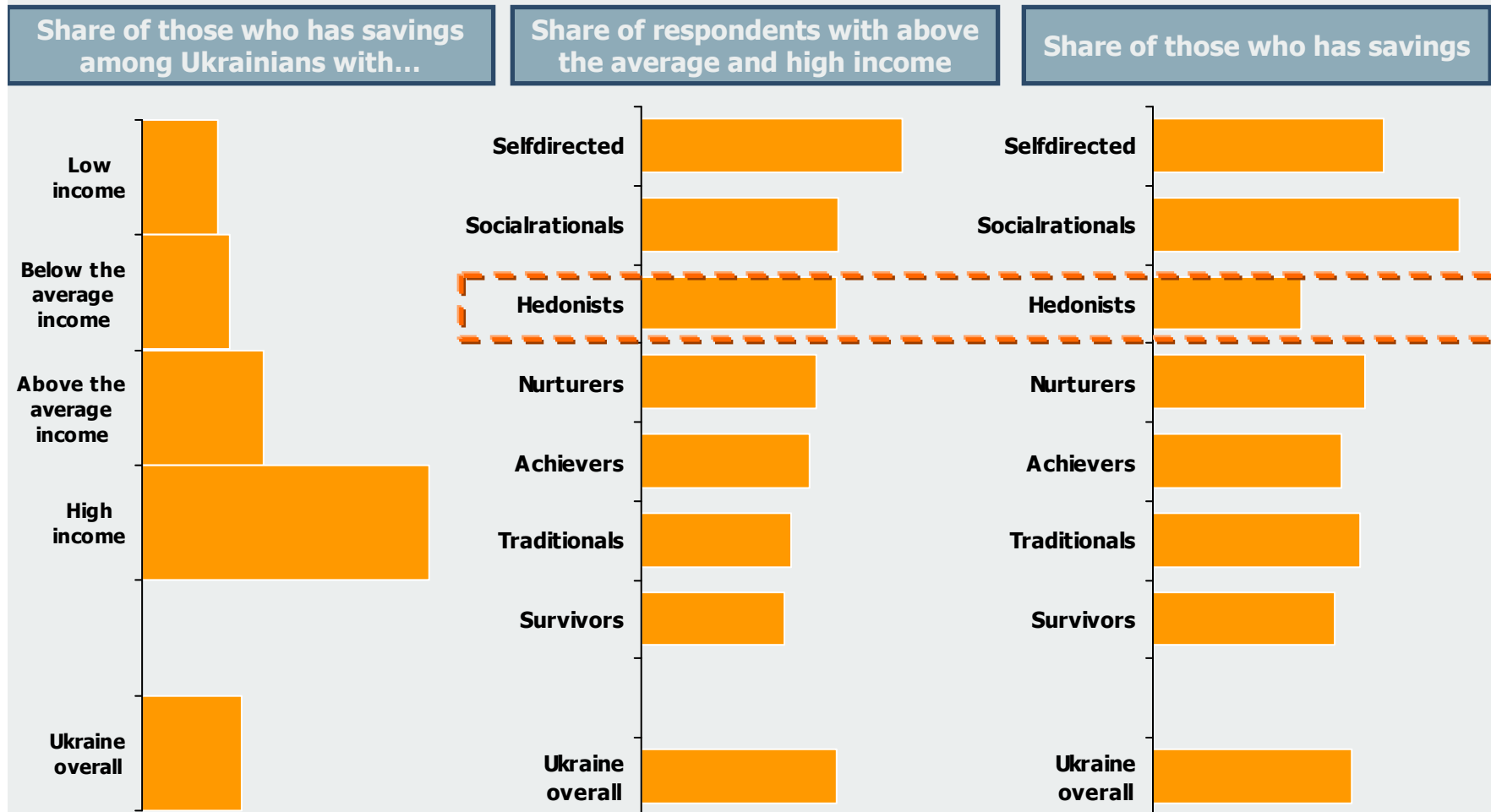
Freedom
Self-reliance
Authenticity

Creating the value space



Hedonists constitute one of the most attractive target audiences for producers of different goods as they save less and spend most of all

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Therefore we'll illustrate the impact of values on consumer behaviour on the Hedonist's example

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Hedonists



THEIR KEY VALUES:

- Sharp impressions
- To feel themselves young
- Entertainments (to have a good time)
- Life of pleasure (to live life to the full)

WHAT CONSUMER BEHAVIOUR IS DETERMINED BY THESE VALUES?

While choosing goods, Hedonists* are most of all ready to pay more for better brands

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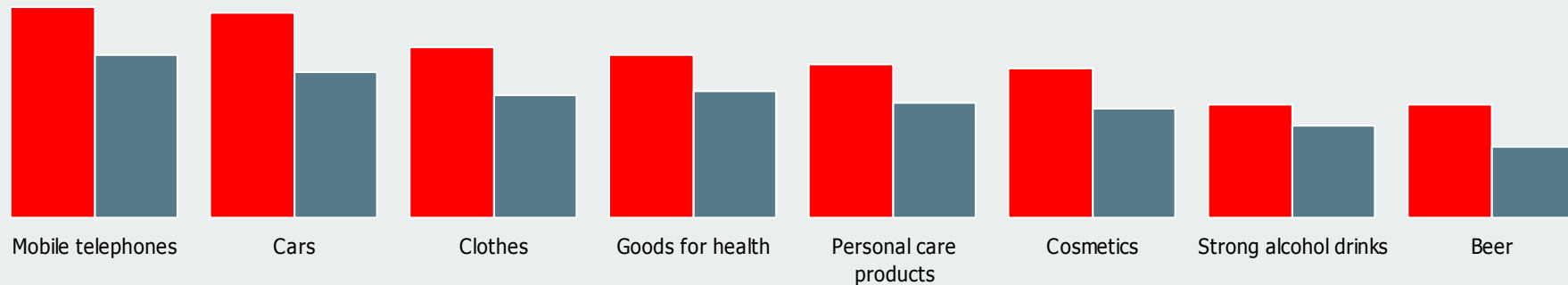


41% of Hedonists prefer to buy prestigious brands

(much higher than, on average, for other segments)

“Some brands of this category ... differ from the others or are even better; so, they are worth paying more”

(the share of those who agree with this statement)



■ Hedonists 15-34 ■ Others 15-34 y.o.

* - Since the representatives of this segment are younger than those from other segments, all comparisons in this part are made on the basis of the same age group (15-34 y.o.)

Hedonists more than other value types are inclined to eating out...

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77%, at least from time to time, have a bite or have a drink in the bar/café*



Moreover, **27%** visit cafes/ restaurants to indulge themselves and to bring themselves pleasure*



49%, at least from time to time, have their meal on the go (while walking or working at the table, or driving/sitting in a car)*

* - the indices are much higher than the mean values of other value types

...and consume different drinks

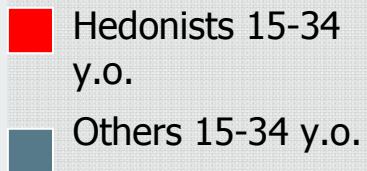
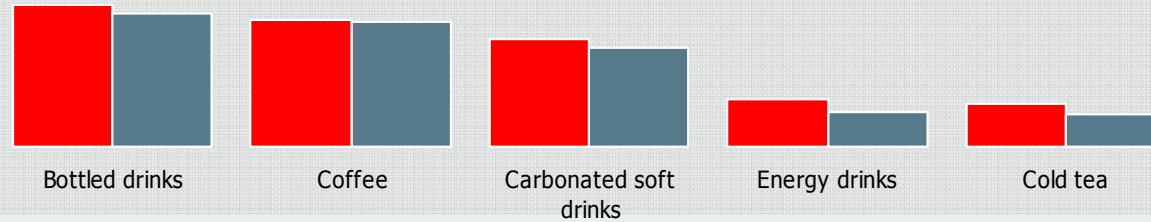
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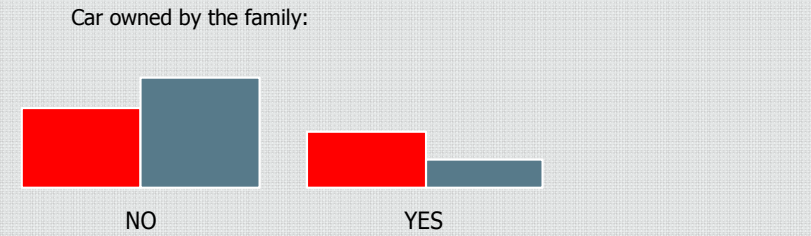
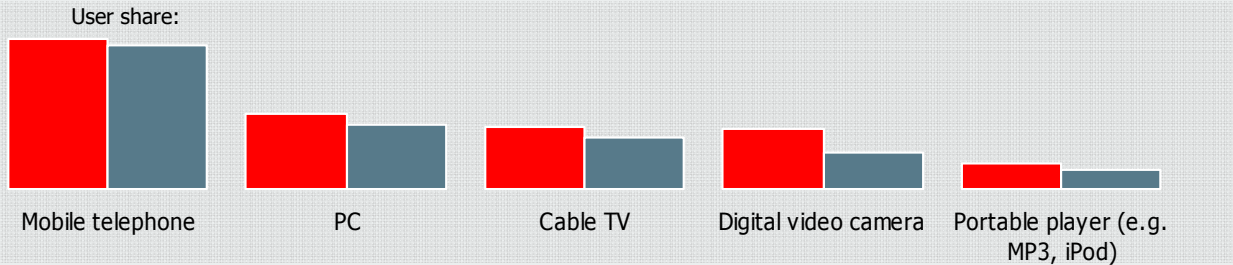
User share:



User share:



Hedonists more actively than other value types use expensive durables



■ Hedonists 15-34 y.o.
■ Others 15-34 y.o.

Hedonists are the most likely to use Internet-based information sources, as well as to trust them

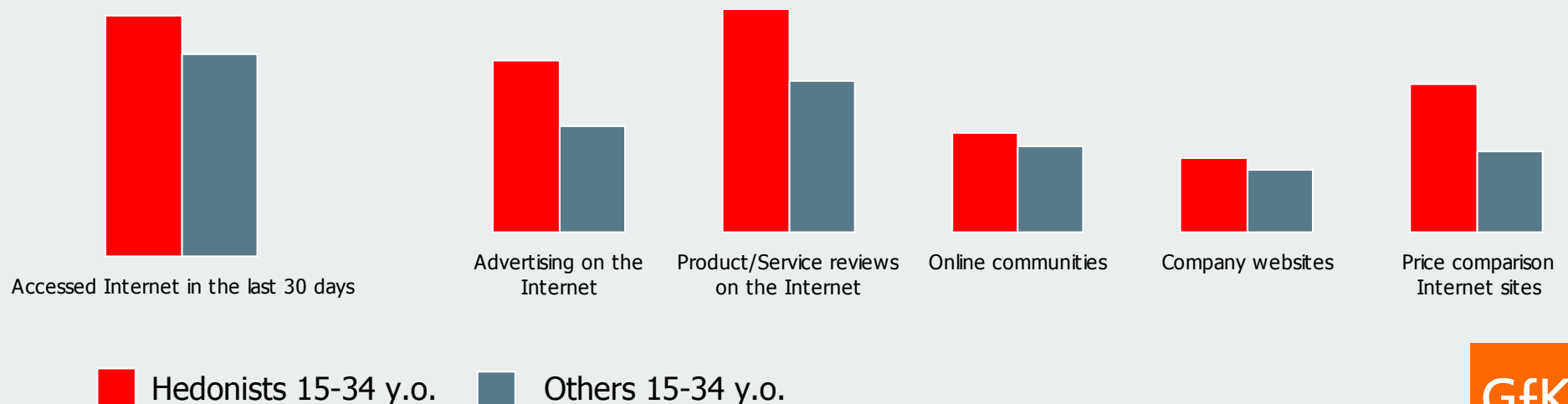
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27% of Hedonists trust online information sources

(much higher than, on average, for other segments)

“Which information sources on products and services you consider to be trustworthy?”

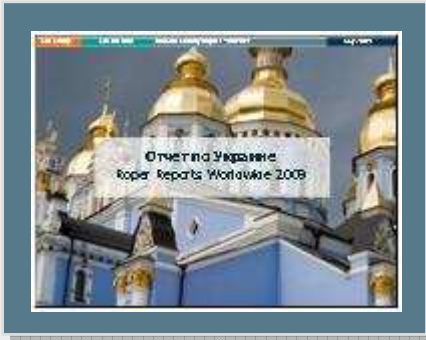




Opportunities of the analysis

GfK Roper Reports. Opportunities of the analysis

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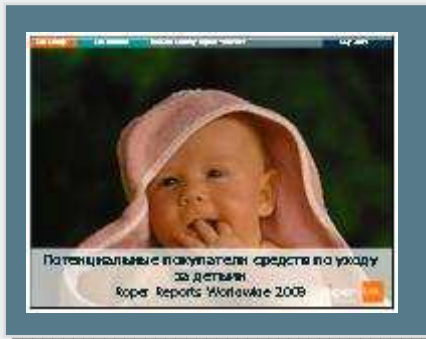
RRW 2009: UKRAINE COUNTRY OVERVIEW REPORT

Report structure – see Slide 17-18

Cost – 50 000 UAH (without VAT) or 6 500 EUR for non-residents

Timing – full report on Ukraine will be ready on June 20, 2009.

You can also subscribe for RRW 2010 (the survey will take place if we have enough subscriptions)



REPORTS ON SPECIFIC TARGET GROUPS

Cost – 1) in case of purchasing General report on Ukraine – 18 000 UAH (without VAT) or 2 300 EUR for non-residents

2) without purchasing General report on Ukraine – 35 000 UAH (without VAT) or 4 500 EUR for non-residents

Timing: 10 workdays after signing the project confirmation



USAGE IN INDIVIDUAL AD-HOC PROJECTS

To deeper understand consumers of your brand / category, the block of value questions can be added to an individual Ad-hoc study (for further segmentation by value orientation)

Levels of the analysis in RRW 2009: Ukraine Country Overview Report

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Global



Global – core 25 countries

Effective Sample size: 35,000

Regional/National



Europe

France, Germany, Italy, Spain, Sweden, UK, Czech Republic, Poland,

Effective Sample size: 7,496

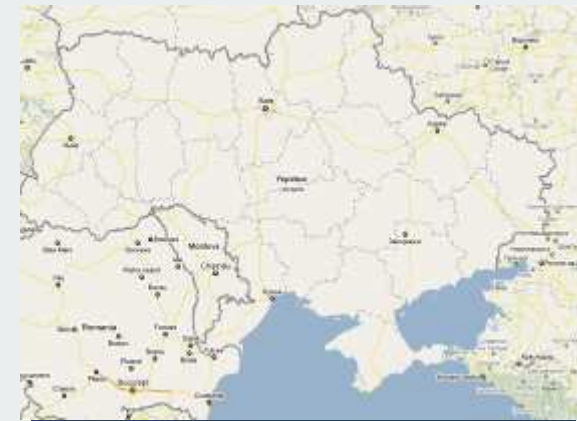
Russia

Effective Sample size: 1,509

Ukraine

Effective Sample size: 999

Local



Regions of Ukraine: East, West, North, Centre, South, Kyiv

Report structure in Ukraine

(Report includes the data on Ukraine, Russia, Europe and the globe)

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1. Personal values and attitudes to life

- Key values
- Segmentation based on value orientations
- Satisfaction with different life aspects

2. Social mood and reaction to crisis

- Public and personal problems which disturb people most
- Crisis events and reactions
- Changes in value orientations and buying behaviour
- Cut backs and economy strategies

3. Consumer leisure & lifestyles

- Time use and leisure activities

4. Consumption and consumer behaviour

- Willingness to pay more for expensive brands (by different product categories)
- Behavioural patterns while choosing goods (e.g. focus on prestige, quality, brand, attitude to the process of choosing goods)

5. Using technology

- Consumption of technology products
- Perception and behavioural patterns when buying information sources

6. Advertisement perception

- Perception and trust in different information sources

7. Healthcare and green behaviour

- View of healthy lifestyle
- Attitudes towards environmental problems and green behavior

8. Summary: Ukrainians: who are they?

9. Ukrainian value types as strategic positioning tool – define and reach your target audience

Communication strategies

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!!! The communication strategies for all-Ukraine population and all the value types are developed within Ukraine Country Overview Report: what communication channels should be chosen and what to communicate for different marketing purposes.



Thank you for your attention!

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