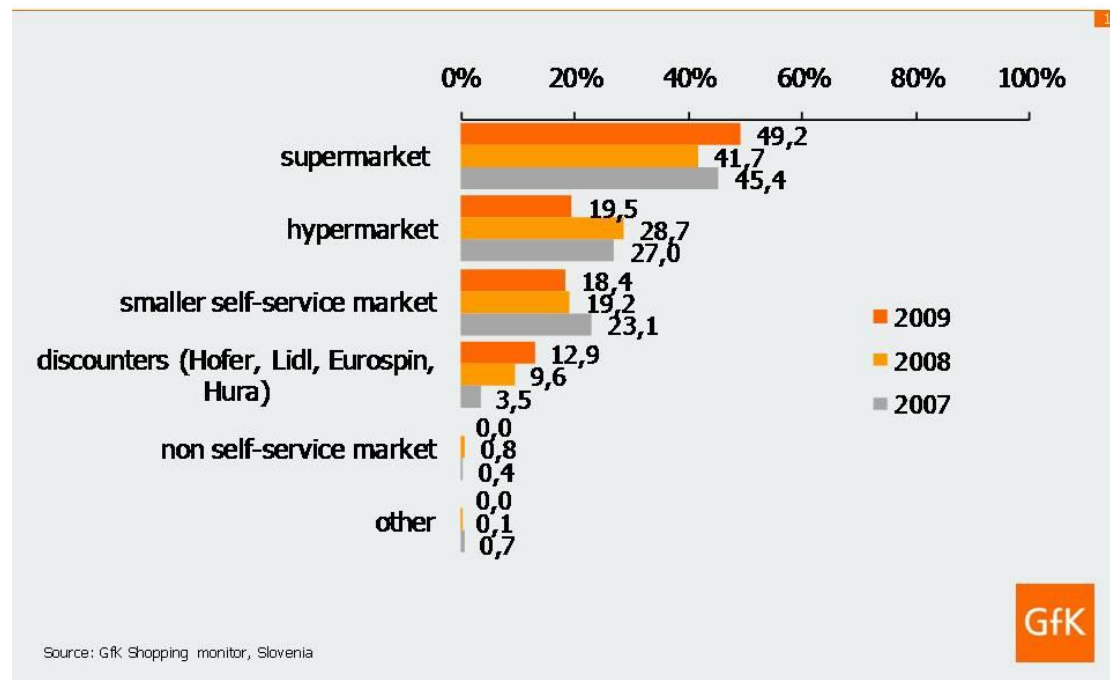


Shopping habits in Slovenia

The Slovenian market is noticing some major changes in customer's shopping habits. The media is reporting changed trends over the last year, claiming that customers are more interested in buying cheaper retail brands and shopping in discount stores. Besides there being an increase in the number of customers with lower purchasing power, the recession is also affecting shopping habits as a result of increased caution and pessimistic expectations. What are the trends in customers shopping habits in Slovenia?

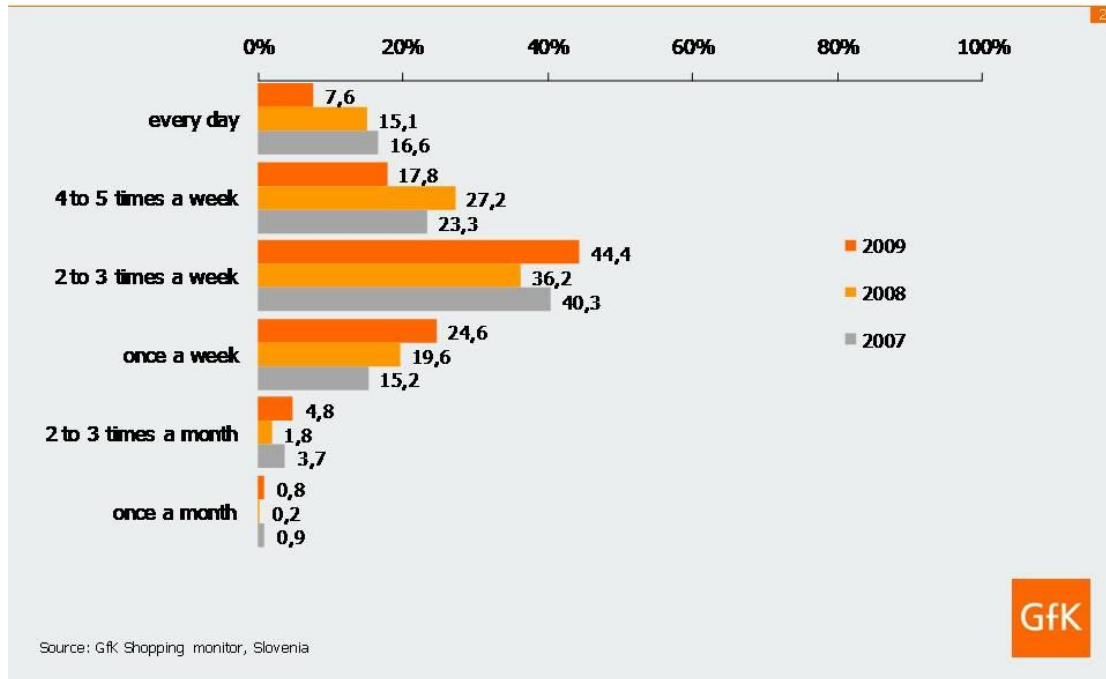
GfK Slovenia has been conducting a shopping monitor for several years so that we have a comprehensive amount of interesting and useful data about the retail sector in Slovenia. In order to monitor any changes in customers shopping habits we have compared results for the period from 2007 to 2009. These results bring to our attention two main changes in shopping habits which reflect consumer behaviour.

Where do you spend most of your money for your everyday purchases?



Shopping in supermarkets and hypermarkets is a global trend which continues regardless of recession, and this is also verified by the data for Slovenia. Within the market, it has been possible to identify a slight shift of venue selection for hypermarkets, where we are noticing more frequent visits to supermarkets but, in particular, there is an expansion of the discounters. On the other hand, consumers who have been affected by the crisis are not holding back on products in terms of quantity but have mainly reacted through their choice of products, reaching more often for value-for-money product segments, e.g. shopping in discount stores or buying store brands.

How often do you buy everyday products?



Looking at 2008 and 2007, the frequency of store visits has also decreased and this is also reflected in a limiting of consumption of other products, e.g. less frequent visits means less fuel consumption. Data for 2009 reveals that, in comparison with the years 2007 and 2008, consumers are also minimising the number of visits they make to stores, the majority of them to 2 or 3 times a week or even once a week. These results could suggest more planned and controlled purchase decisions so that in this way they spend less and have better control over their spending on everyday products.

It is clear that customer purchasing behaviour is becoming more rational and more focused on their "real" needs. Are increased rationality and expedience not just the result of recession but also something that is becoming the customer's way of life? Further study of customer behaviour will provide answers regarding the longevity of this phenomenon and for all the other questions which will definitely arise in the fast changing environment we are facing today.

Contact:

Anze Primozic
Senior researcher
Custom Research

GfK Slovenia
Verovskova 55a
1000 Ljubljana
Slovenia

Tel. +386 1 4720 328

Fax +386 1 4720 334

anze.primozic@gfk.com

www.gfk.si