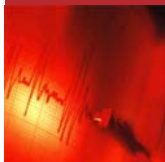


GfK ConsumerScan

Observing and understanding the consumer
Business Information Services for Consumer Goods



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Growth from Knowledge

Since the official launch of the ConsumerScan survey on the Bulgarian market we provide tracking information and special analyses to the international companies, local producers, advertising agencies etc.

We in GfK believe that as a provider of business data the most important aspect of our work is to consult and thus to support the marketing activities into the daily work of our clients.

GfK Consumer Tracking is not just about observing and understanding. The ability to foretell the future has always been a sought-after business asset, though there are no crystal balls at GfK: we base our forecasts on hard, reliable facts gleaned from experience. Consumer Tracking observes changes as they happen, evaluates the current situation and develops what-if scenarios. Understanding why people make purchasing decisions is an important part of any business strategy, but so is forecasting the future.



[change]

At the beginning of our work we launched the ConsumerScan survey based on **1000** households sample size.

We organized all steps of the tracking measure of Fast Moving Consumer Goods, Consumer Durable, Print Media issues as a stable, efficient, high quality panel research.

To be of more beneficial service to the international companies, local producers, advertising agencies and print media publishers we increase the sample size up to **2000** households.

Knowledge breeds Success

The following are the main services we provide:

Brand and Market Tracking:

How is your brand developing over time, and how is the retail sector as a whole changing?

Consumer Dynamics:

How, when and why do consumers change their buying behaviour?

Data Integration:

By combining consumer research data from a variety of internal and external sources, we can help you to identify the links between cause and effect.

Information Technology:

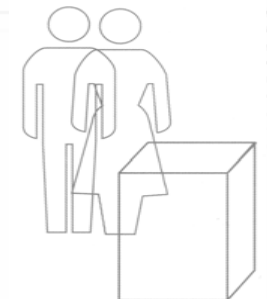
We use innovative datagathering and data delivery technology, and state-of-the-art software applications, for easier access to information.

[strength]

Acting on Information

Continuous monitoring on market size, brand/producer shares and buying patterns of FMCGs, answering the following questions:

- What is the market volume of a FMCG market?
- How big is your market share?
- What is the trend of the market size / share?
- What is your position in certain region?
- How important are the various channels of distribution?
- What is the price structure in the market?
- Who are your competitors and customers?
- Who are the heavy buyers and do you reach them?
- How loyal are customers to your brands?
- Do your customers switch to other brands and why?
- What are the most important product characteristics for your customers?
- What are the motives and attitudes of your customers?



GfK Business Solutions

GfK ConsumerScan, the series of large-scale household represents high-quality, flexible market research tool of proven effectiveness. More than 75,000 households across Europe provide daily reports on their consumer goods purchases, in fact, you'd be hard pressed to find a more representative service. In addition, special panels are used to record the buying habits of particular categories of products by specific target groups. ConsumerScan provides information on purchaser attributes, purchase behavior, penetration, share of category requirement, brand loyalty, and parallel consumption, to name but a few.

Standard Tracking Reporting systems

Monthly/Bi-monthly:

- Market size (volume & value)
- Purchase rates
- Brand shares (volume & value)
- Splits by qualities/varieties
- Average price

Four monthly breaks by:

- Outlet types (Supermarkets, Named key-accounts, Big/small food retailers, Wholesalers, Street-vendors, etc.)
- Regions

Yearly/Half-yearly:

- Socio-demographics by brands

Presentations:

- Half-yearly/Yearly

In-Depth Special Analyses

Launch Analyses:

- Trial & Repeat Buying
- Parfitt & Collins
- Buyer Migration

Brand Health Analyses:

- Brand/Retailer Health Check
- First Choice Buyers

Positioning Analyses:

- Brand Duplication
- Heavy Buying
- Brand Positioning

Switching/Migration Analyses:

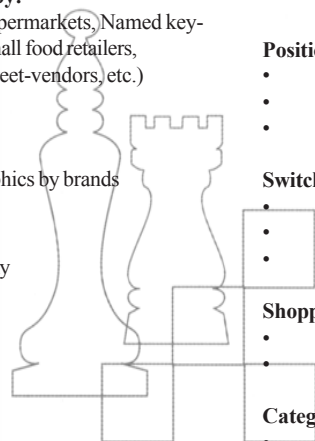
- Brand Switching
- Gain & Loss
- Buyer Migration

Shopping Analyses:

- Buying Frequency
- Weight of Purchase

Category Management:

- CatManGuide



[innovation]

GfK ConsumerScan World-Wide

A total of 75,000 households in 25 European countries report their purchases to GfK and its EuroPanel partners. The following countries are covered:

Austria, Azerbaijan, Belgium, Bulgaria, Czech Republic, Denmark, France, Germany, Great Britain, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Spain, Sweden, Switzerland, Turkey, Ukraine, Yugoslavia.



The common dominator

Numbers, statistics, decisions: inter-country comparisons can be a time consuming process if you do them on your own — which is where GfK comes in. We work closely with representatives in most European countries to provide a one-stop shop for all your needs. In America, we work with the NPD Group, one of the leading US organisations of its kind. Your contact at GfK will be responsible for coordinating research and collating the information and services from each country, so that you always have up-to-date international research data that gives you the answers you need.

Over and above the area covered by EuroPanel, GfK's best-practice teams have created a Consumer Tracking Board to provide you with tailor-made international solution packages. These provide added understanding of consumer behaviour throughout Europe, Our skill-centre specialists regard market research as much more than simply juggling figures. They work constantly to ensure that your needs are being met and to closely monitor the markets and consumers that you are particularly interested in. We want you to have complete confidence in our performance.

[world-wide]

GfK Bulgaria ConsumerScan

GfK Bulgaria is a full-service Market Research Institute. The company was set up in 1994 as a subsidiary of GfK Group. The personnel of GfK Bulgaria is represented by high qualified experts in marketing researches, sociology, psychology, statistics and computer science. High tech technologies at European standard are used for implementing and carrying out the researches.

GfK ConsumerScan is one of the pioneers of continuous market research: we have been offering this service to our clients since 1957. Our consumer panels and international centres of excellence provide you with the information you need for strategic planning and decision-making.

Bulgarian ConsumerScan was launched in the middle of 1998 as a part of operation of ConsumerScan in Central & Eastern Europe. It is operated on a nationwide sample of households.

[history]

The panel research sample is selected according to geographical and socio-demographic criteria and represents permanent representative sample according to:

- Regions
- Type & Size of Community
- Household size
- Occupation of head of household
- Size of community
- Number of children in household

Self-completion diaries, filled in daily, weekly collected via post guarantee precise and accurate information.

EAN brands measuring provides a faster and more accurate and reliable information of household purchases. This quantum leap in data measurement technology allows us to observe and analyse consumer behaviour in even more details having the brands into the different Stock Keeping Units (SKU's)



FMCG Category Measured

Washing & Cleaning Products

- Detergents (Heavy & Light Duty)
- Fabric Conditioners & Water Softeners
- Hand Dishwashing Liquids
- All purpose cleaners
- WC Blocks & Cleaners

Toiletries

- Toothpaste
- Toilet Soap
- Hair Maintaining Products
- Hair Colorants
- Body Deodorants
- Sanitary Protection
- Facial Care
- Body Care Products
- Shaving Products
- After Shaving Products

Hot Beverages

- Ground and Bean Coffee
- Instant Coffee
- Tea (black, fruit based, herbal)
- Cocoa & Chocolate Drinks

Cold Beverages

- Syrups
- Fruit Juices
- Ice Tea
- Powder Soft Drinks
- Carbonated Soft Drinks
- Mineral Water
- Beer
- Sparkling Wine

Dairy Products

- Normal yogurt
- Fruit yogurt
- Milky Desserts
- White & yellow cheese
- Processed Cheese
- Cream
- Fresh Milk & UHT
- Flavored Milk
- UHT
- Butter

Other Food Categories

- Margarine
- Edible Oil
- Dry Pasta Products
- Concentrates
- Chocolate tablets & bars
- Pralines
- Cookies & Wafers
- Snacks, Chips & Croissants
- Mayonnaise
- Salad Dressings
- Mustard, Ketchup
- Tomato Puree
- Lutenitsa, Kiopolu
- Take-in-home Ice Cream
- Pudding Powder

PrintMedia*SCOPE

- Daily Newspapers
- Weekly Newspaper
- Magazines

Household Consumer Durables Ownership

- Audio & Video Machinery
- Fabric Care Machinery
- Cooking Machinery
- Communication Equipment
- Household Machinery Equipment

ConsumerSCOPE

[the markets]