

New reality

**2020, March – December
Research proposal**

Prepared by Ipsos, March 2020

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GAME CHANGERS





Research overview and methodology description

Background



Consumption behavior
monitoring
has been conducted
since November 2008



Periodicity

2008 – Nov, Dec
2009 – monthly
2010 – quarterly
2011 – none
2012 – semiannual
2013 – none
2014 – quarterly
2015 – monthly
2016 – monthly
2017 – quarterly
2018 – quarterly
2019 – quarterly
2020 - monthly

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Questions of interest



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Geography, target audience and methodology



1000 interviews per wave

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Interview flow

Screening

Opinion about financial crisis

- Awareness of events, their importance for people
- Economic crisis: awareness and involvement (do people care or not?)
- How crisis affected respondents and their colleagues, relatives, friends
- Change of financial behavior

Behavior patterns

- Durable products
- Other goods and services
- FMCG (Food and Non-food products)
- Pharmaceuticals

Demographics

Timing and cost

TIMING

	FW	Report (Eng. version)
March	March 9-13	March 24
April	April 6-10	April 20
May	May 12-16	May 25
June	June 8-12	June 22
September	September 7-11	September 21
December	November 30 – December 4	December 14

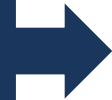
DATA SUBMISSION FORMAT

Power Point report in Russian and English

Excel tables including wave dynamics, subgroup analysis
(by gender, age, region, income)

Durable goods list

- Small equipment for kitchen
- Small HH appliances for personal care
- Large HH appliances
- Large audio-video appl./electr. (excl. TV-set)
- Small audio-video appliances/electronics
- TV-set
- Mobile phone/smartphone
- Tablet
- Computer appliances
- Furniture
- Real estate
- Car



BEHAVIOR PATTERNS

- rejected the purchase (completely or partly) or put it off
- began to buy/bought less expensive brands/options
- sold already existent
- nothing has changed
- invested in purchase/purchased for the future, earlier than planned
- began to buy/bought more expensive brands/options

Other goods and services list

- Petrol
- Traveling
- Sports, hobby
- Eating out
- Repairs (DIY)
- Outings (theatre, exhibitions, etc.)
- FTTB Internet
- Mobile communications and internet
- Cinema

BEHAVIOR PATTERNS

- rejected to spend/use/buy (completely)
- began to spend less money, cut expenses, began to save money
- nothing has changed
- began to spend more money

FMCG Food list

- Milk
- Dairy products
- Kefir, ryazhenka
- Sour-cream
- Cottage cheese
- Yogurts, milk desserts
- Baby dairy food
- Baby food (not dairy)
- Cheese
- Chips
- Crisp bread
- Savory snacks
- Coffee
- Tea
- Cacao
- Chocolate bars
- Chocolate tablets
- Chocolate in boxes
- Loose / bulk chocolate candies
- Confectionery (non-chocolate)
- Pastries
- Ice cream
- Chewing gum
- Chewing marmalade
- Caramel, sweet candy
- Beer
- Wine/champagne/vermouth
- Vodka
- Strong alcoholic drinks
- Carbonated drinks
- Juices, nectars
- Bottled water
- Kvass
- Ice tea
- Energy drinks
- Grocery
- Breakfast cereals
- Seasonings in packets
- Bouillon cubes
- Meat
- Fish
- Sausages
- Frozen semi-cooked products
- Mayonnaise
- Ketchup
- Soy sauce
- Other sauces
- Instant lunches
- Porridges

BEHAVIOR PATTERNS

- began to buy less than usually
- began to buy less often
- began to buy less expensive brands
- began to buy at places with cheaper prices
- nothing has changed
- bought for the future, in store (more than usually)
- began to buy more than usually
- began to buy more often
- began to buy more expensive brands
- began to buy at places with high prices

FMCG Non-food list

- Shampoo
- Hair care
- Hair styling
- Toothpaste&mouthcare
- Tooth brush
- Soap
- Liquid soap
- Soap in bars
- Shower gel
- Deodorants
- Body care
- Detergent powder
- Home cleansers
- Large accessories for home cleaning
- Small accessories for home cleaning
- Hand cream
- Face care
- Make-up products
- Female hygiene products
- Toilet paper
- Condoms
- Baby care
- Baby diapers
- Pharmaceuticals
- Cigarettes
- Contact lenses
- Perfume
- Pet (cat/dog) food
- Razors (males/females)
- Blades (males/females)

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Pharmaceuticals

- Nasal drugs (drops, sprays, etc.)
- Anti-cough drugs
- Anti-cold drugs, antipyretic drugs
- Anti-virus drugs
- Anti-sore throat drugs
- Antispasmodics, Anti-abdominal pain drugs
- Analgesics, anesthetics
- Vitamins
- Depressants, sedatives drugs
- Antibiotics
- Drugs against indigestion and digestive problems
 - Antacids, anti-heartburn drugs
 - Antiulcer drugs
 - Enzyme drugs
 - Hepatoprotectors, drugs for the treatment of liver
- Antihistamines, anti-allergic drugs
- Eye drops and ointments
- Dermatological cosmetics



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Deliverables example

Category (1)

Consumption behavior patterns

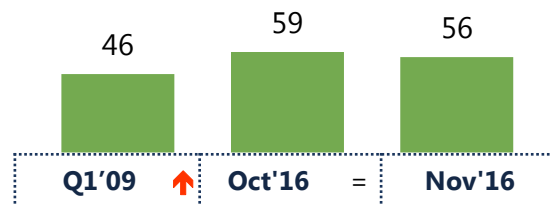
	Nov'16	Q1'09	Oct'16	
	%	+/-%	+/-%	
	20	-7↓	-9↓	Put off or gave up the idea of purchasing
	39	+19↑	+5	Began to buy less expensive brands
	4	+4	0	Sold
	6	-4↓	+2	Stored up
	37	-7↓	+2	No change
	2	n/a	-1	Increased expenses

21 5 Significantly **higher/lower** than average category

+9↑ -7↓ Significantly **higher/lower** than in other period

Dynamics (total)

Began to save money on (p. 1-3), %



November'16

Began to save money on (p. 1-3), %

Mos (a)	SPb (b)	Reg (c)
58	48	58
<15 th. (d)	15-30 th. (e)	>30 th. (f)*
70 ef	55	50

ab Significantly **higher** than in column marked with this letter

*Income per capita, rub.

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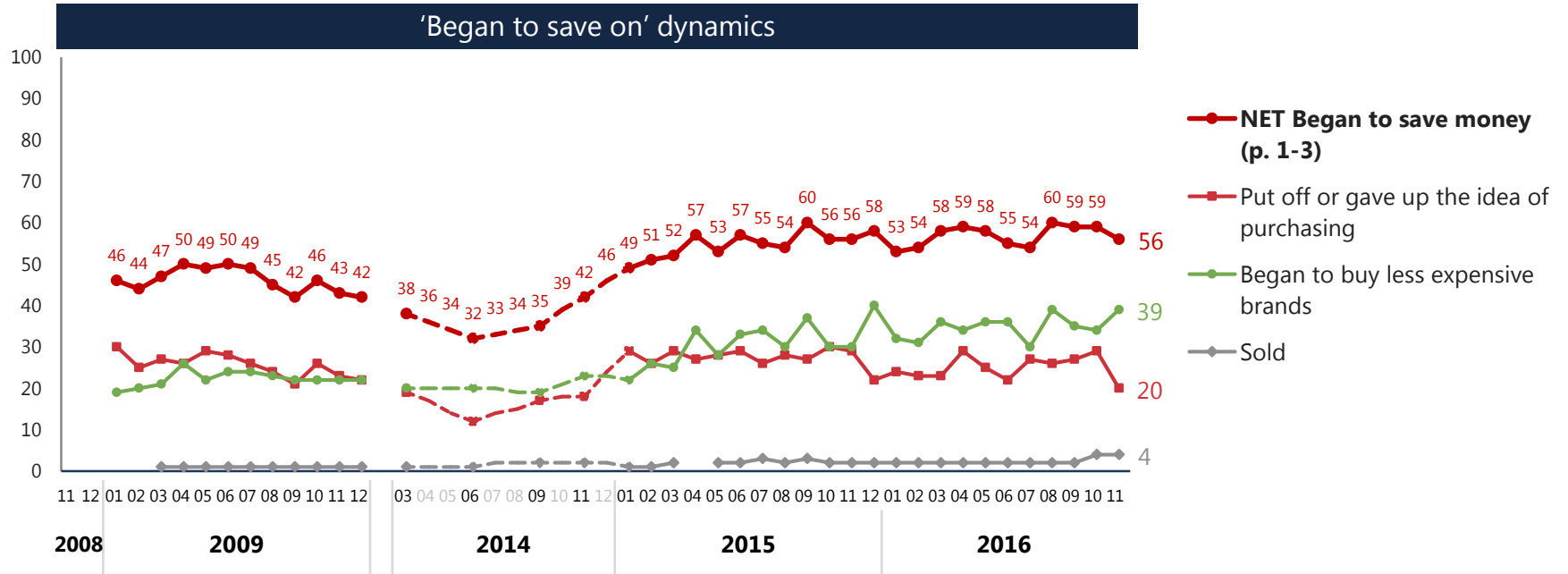


Q: Thinking of the last month, did you change the purchases of the following categories? MULTIPLE ANSWER

#: base – category purchasers

Category (2)

Consumption behavior patterns



Q: Thinking of the last month, did you change the purchases of the following categories? MULTIPLE ANSWER

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Category (3)

Consumption behavior patterns

November 2016: Consumption behavior patterns by subgroups, %

	TOTAL	Gender		Age			Income per capita			Region		
		Male	Female	18-25	26-35	36-45	<15 th.	15-30 th.	>30 th.	Moscow	SPb	Regions
	T	A	b	c	d	e	f	g	h	i	j	k
Began to save on (p. 1-3)	56	52	60	67 de	53	51	70 ghT	55	50	58	48	58
Put off or gave up the idea of purchasing	20	15	25 a	24	18	19	29	18	17	23	14	20
Began to buy less expensive brands	39	39	39	45	37	35	44	42	33	37	38	40
Sold	4	6	2	6	2	6	3	6	2	4	4	4
Stored up	6	7	5	6	5	8	3	8	6	5	10	5
No change	37	40	34	28	40	41	28	38	42	36	40	37
Increased expenses	2	3	2	1	3	3	0	2	4	4	2	2
Base (category purchasers)	320	149	171	87	131	102	69**	125	126	132	52**	136

T Significantly **higher** vs. TOTAL
t Significantly **lower** vs. TOTAL

ab Significantly **higher** than in column marked with this letter

** Please, consider small base

Q: Thinking of the last month, did you change the purchases of the following categories? MULTIPLE ANSWER

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**YOU ACT BETTER
WHEN YOU ARE SURE**

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