Growth
from
Knowledge

#BehaviorChange

Shocks, shifts, what sticks....

#BehaviorChange

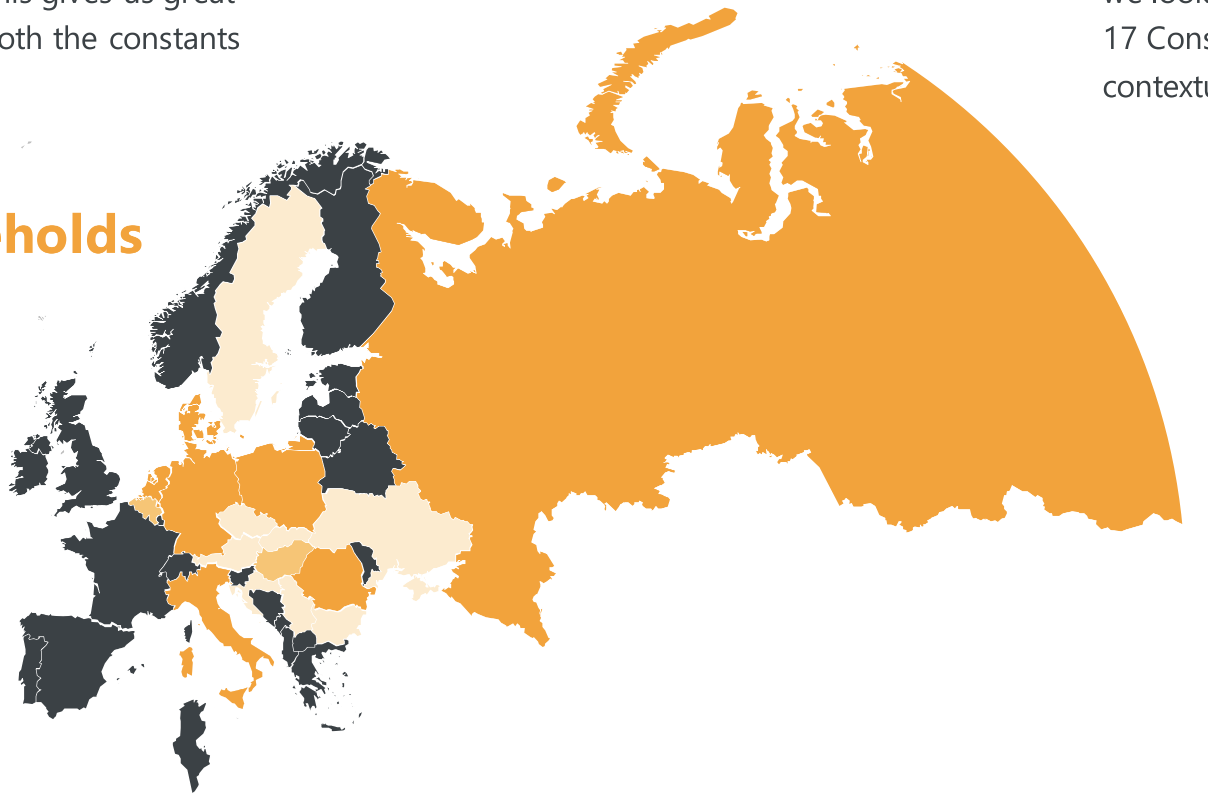
At GfK, we capture and assimilate behavioral data continuously. Be it the scanned FMCG household purchases via our Consumer Panel or the underlying motivations, needs and wants via our Why2Buy & ad hoc solutions. This gives us great prowess to bring foresight on both the constants of change and lasting shocks.

With our #BehaviorChange insights, we cater to the ever growing need to make sense of past year's impact and prepare our clients for the strategic business decisions that inevitably follow.

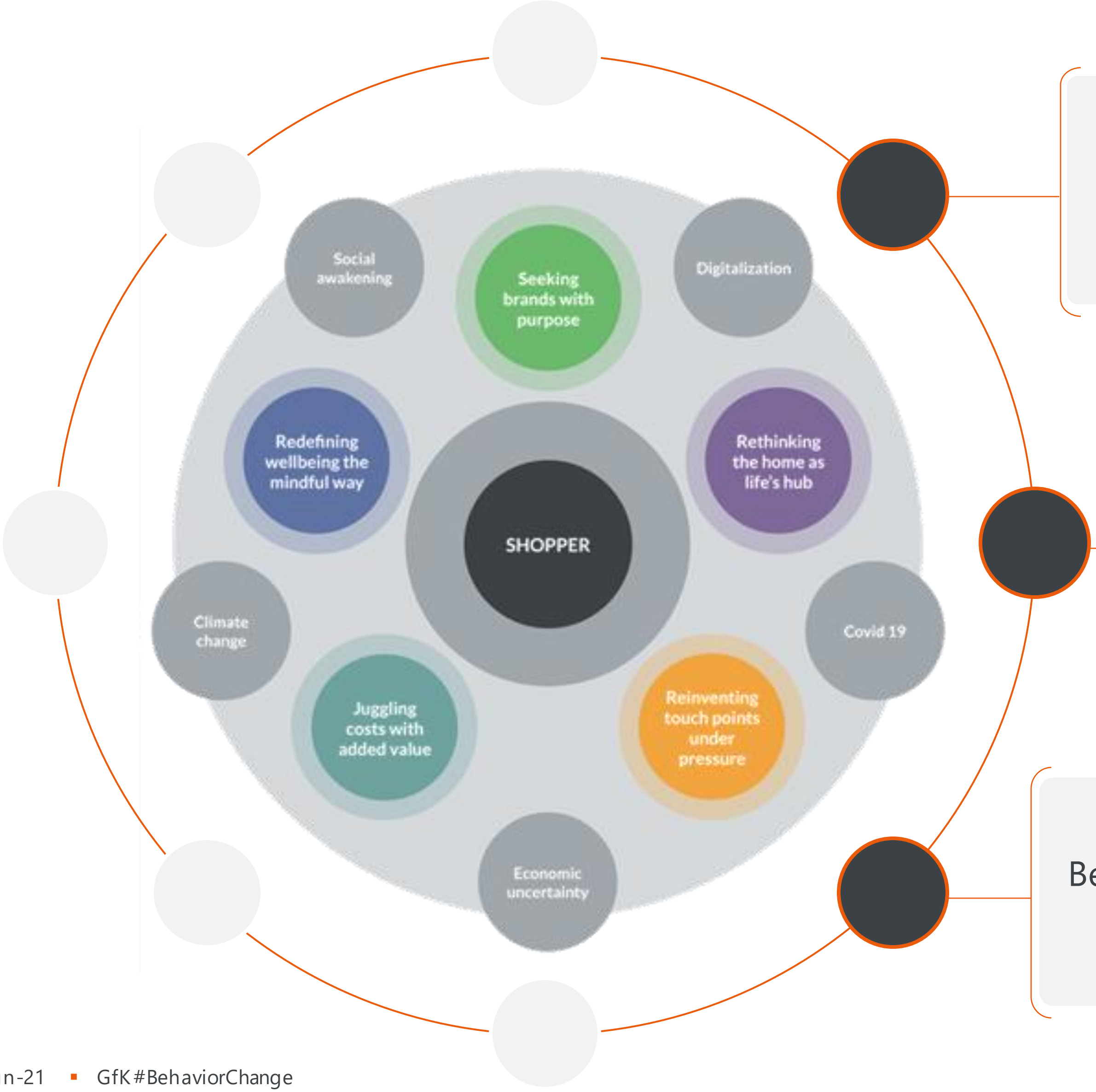
In 7 core countries, we've interviewed main shoppers about their behavior in the past year (May 2021) and their expectations for the next year in order to predict what will stick. In addition, we look into key purchasing KPIs from across our 17 Consumer Panel markets, to further contextualize our findings.

200 million households

EU-7 (+BE / HU); EU-17



#BehaviorChange



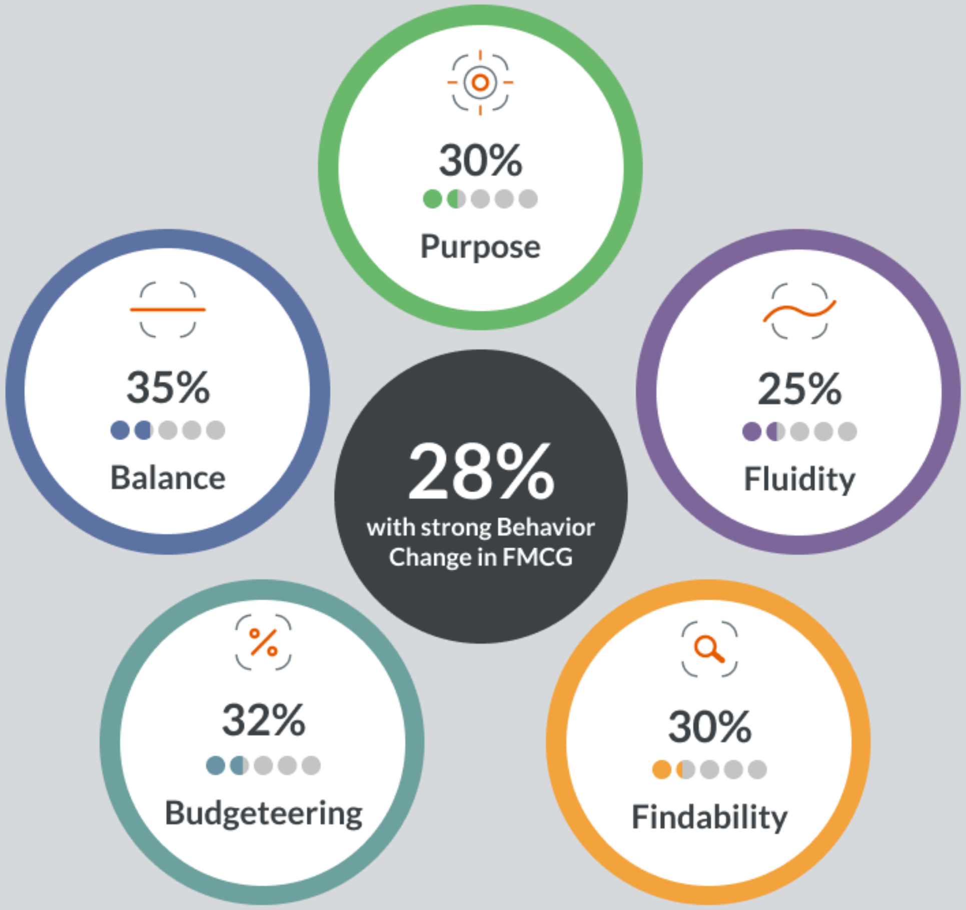
Paraphrasing Heraclitus, change is constant. But the pandemic has had a true shock effect on consumer and shopper behavior.

Since the home has become the new hub, Europeans are increasingly looking for balance and practicality. Meanwhile, they are also heavily weighing in cost, value and (environmental) impact. In addition, the COVID crisis has led them to shop in other places and at a faster pace, changing trusted routines.

Behavior change comes in shocks and shifts, but what sticks? Looking ahead, we see five major forces defining the FMCG landscape

#BehaviorChange

Over 1 in 4 Europeans significantly changed their behavior



Over 1 in 4 Europeans said to have strongly changed their FMCG related behavior last year. This is, with only a slight variation, equally so for behaviors relating to the 5 driving forces.

In a year dominated by the COVID-19 pandemic, up to 1 in 3 has made a significant change in their pursuit for health, balance and happiness.

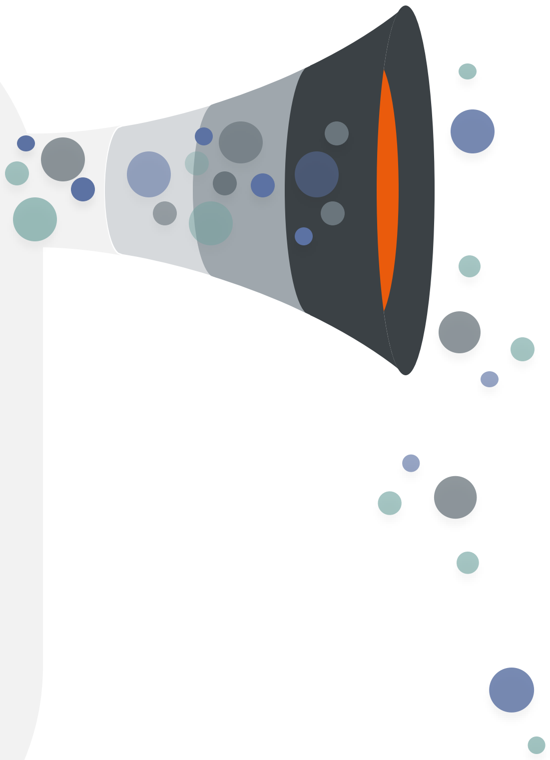
EU-7 How has last year changed behavior?

T2B in % - strong change

28%

General behavior change

Daily behavior in the last year: e.g. with regard to grocery shopping, health & wellbeing, meal preparation, work situation etc., how much has your behavior changed?



Balance — Taking care of health and wellbeing: different attention to mental and/or physical health, healthy nutrition and information, moderating ‘bad’ products. — 35 %

Budgeteering — Purchase decisions regarding price and quality: different attention to price, special offers, quality. Perception of what is really worth to spend on. — 32 %

Purpose — Social responsibility: consciousness about the environment, the local community, and/or social equity. Adjust what you consume and what you buy to reflect this. — 30 %

Findability — How you shop: the time it takes, how you go through the (online) store, going to different stores, how you choose the right products — 30 %

Fluidity — Why and what you shop: getting food & drinks in different ways than before, new needs because of working from home, shopping closer to home or at different times. — 25 %

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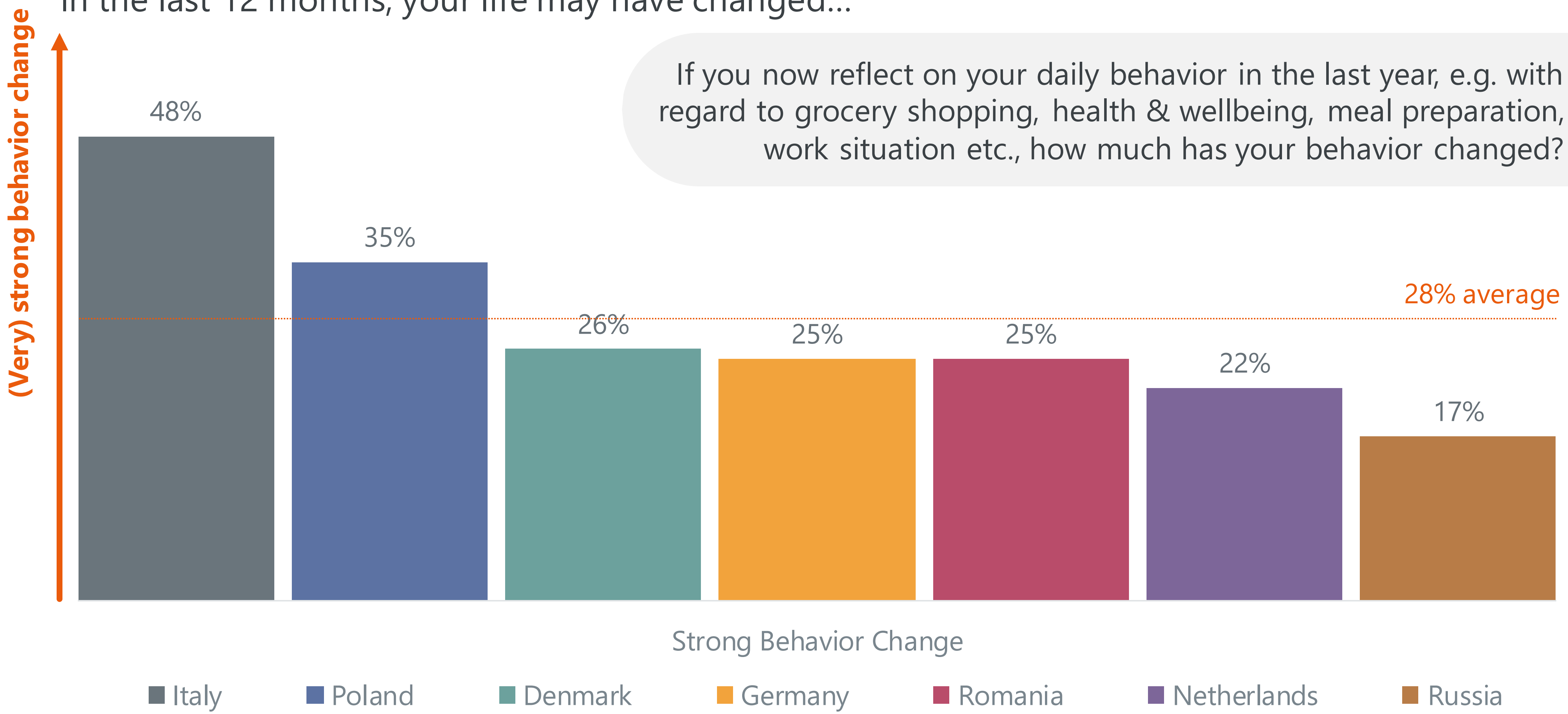
Strongest behavior change in Italy

In the last 12 months, your life may have changed…

If you now reflect on your daily behavior in the last year, e.g. with regard to grocery shopping, health & wellbeing, meal preparation, work situation etc., how much has your behavior changed?



Behavioral shocks & accelerations

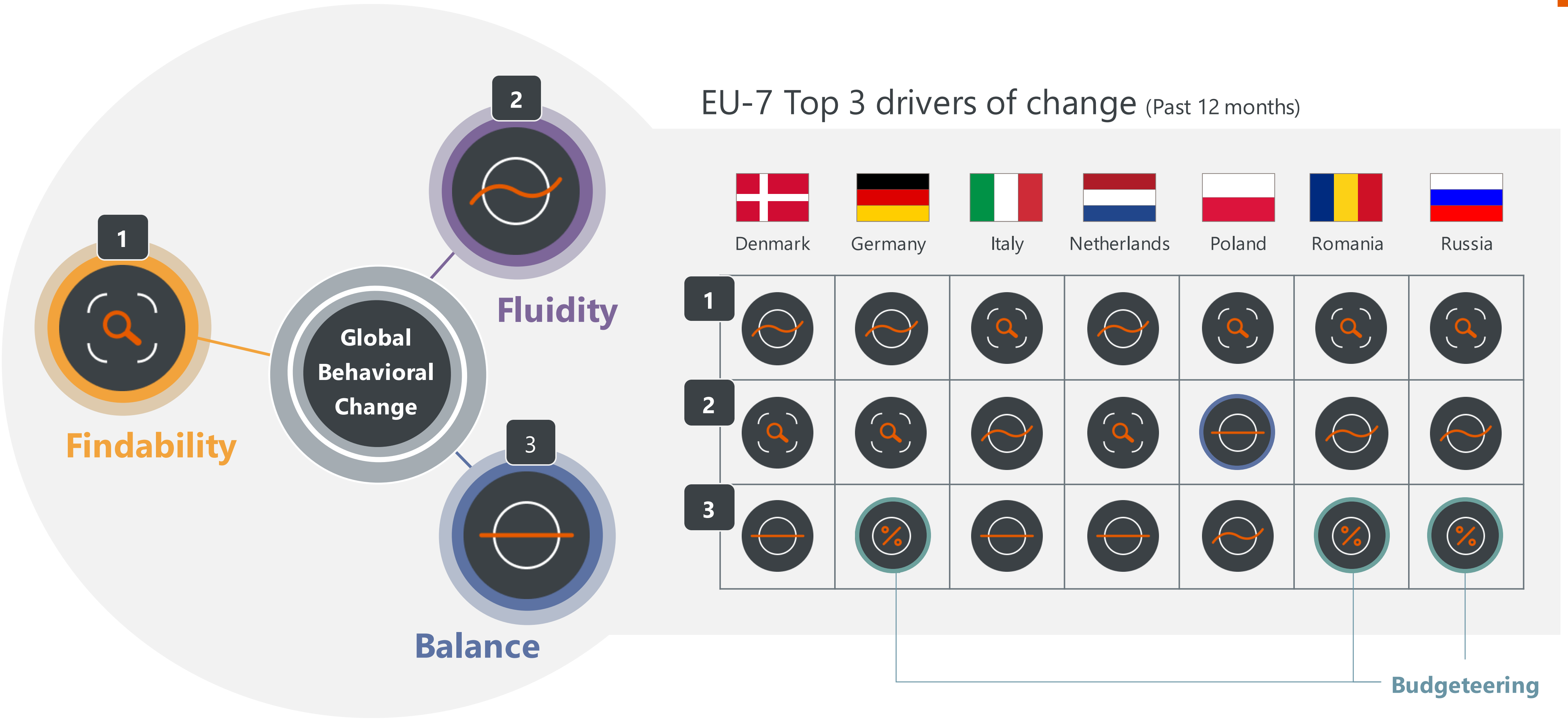
New routines have been shaped, many will linger

% of European with strong behavior change in shopping and consuming FMCG in 2020	% of European with strong behavior change on 5 major driving forces in 2020	Impact on experienced behavior change	Expectation for 2022
28% with strong Behavior Change in FMCG	25% Fluidity	Change level: **shock**	↘
	30% Findability	Change level: **shock**	↗
	30% Purpose	Change level: **acceleration**	↗
	35% Balance	Change level: **acceleration**	↗
	32% Budgeteering	Change level: **acceleration**	↗

Fluidity and Findability have had the most impact on last year's behavior change in FMCG. As these forces are heavily influenced by lockdown rules, they caused a true **shock.**

Purpose, Balance and Budgeteering are forces that are much more freedom-ridden. Although causing less shock effect, they invariably **accelerated** and reshaped throughout the crisis.

Consistent picture across Europe

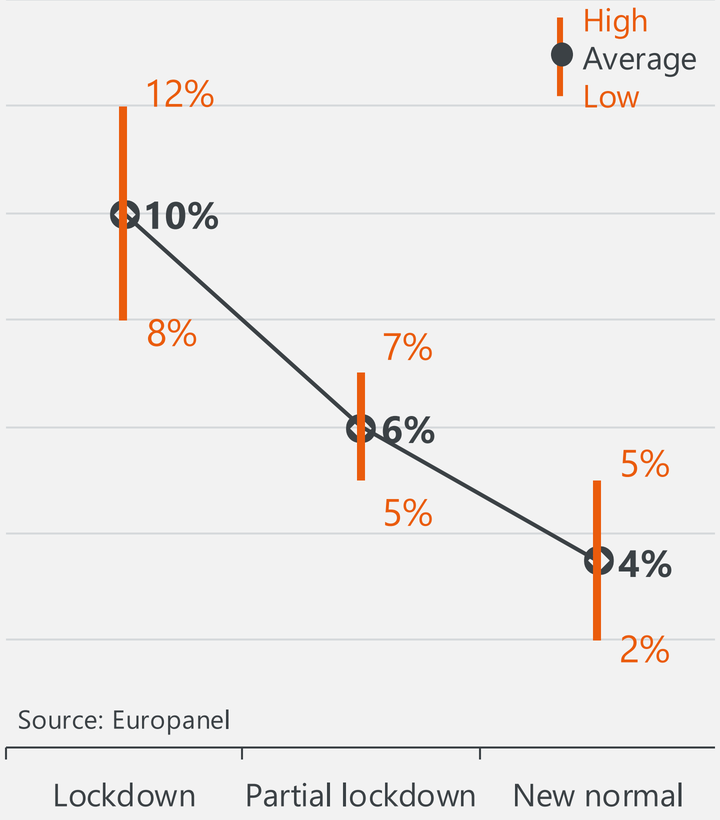


Ad hoc study EU-7 n =4.615 | Germany is integrated, but is not displayed. |Questions: Q6 In the last 12 months, your life may have changed. If you now reflect on your daily behavior in the last year, […] 1: "not at all" - 5: "very strongly"; Q7 Now please again reflect on the last 12 months: Has your behavior changed during this time when it comes to HOW you shop? […]; Q21 […] Has your behavior changed during this time when it comes to WHY and WHAT you shop? […]; Q37 […] Has your behavior changed during this time when it comes to taking care of health and wellbei ng? […]; Q58 […] Has your behavior changed during this time when it comes to taking care of others and the environment? […]; Q74 […] Has your behavior changed during this time when it comes to purchase decisions regarding price and quality? […]

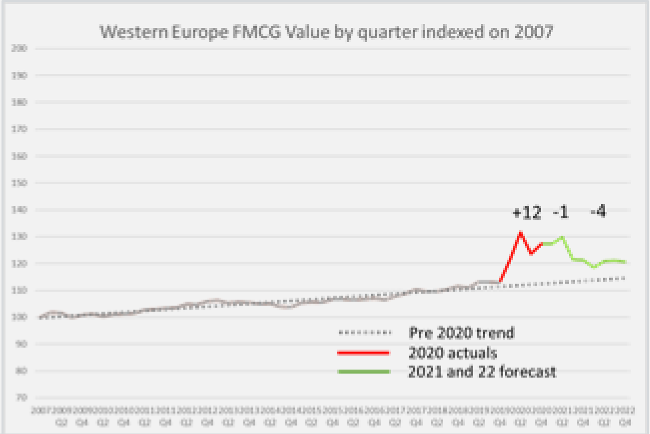
A third of lockdown growth expected to stick

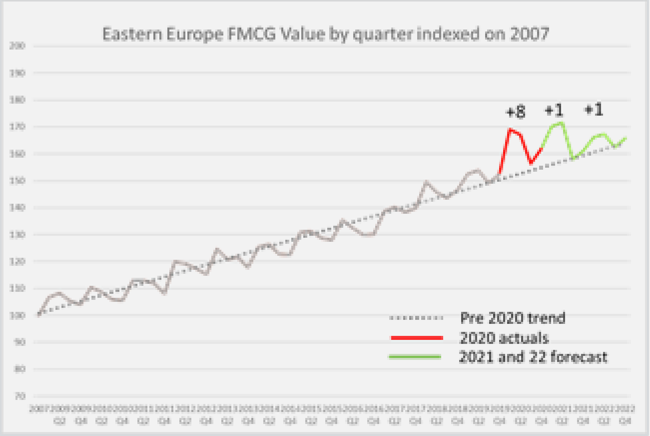
But over half of Europeans (possibly) financially affected by crisis

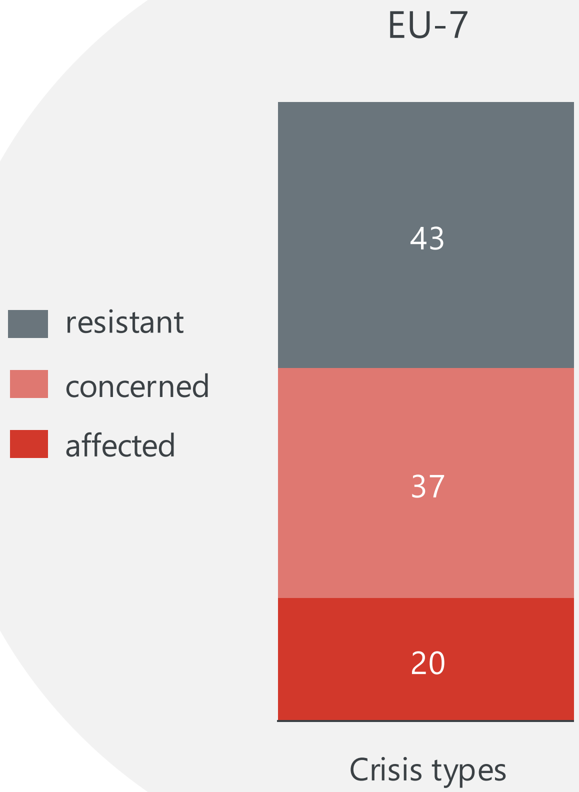
Global FMCG value effects compared with expectation



Source: Europanel







...What behaviors will stick?

Findability

COVID-19 has led shoppers onto a slippery path of **touch point reduction.** In the past year, we spend as little time in store as possible, preferably at as little places as possible. Many shoppers have stopped going to the store altogether, and moved their purchasing online. **The depression of in-store face time means findability is key to success.**

Findability: established behaviors 2021

Key behaviors
often/always

I made a shopping list	61%
I shopped as fast as possible	50%
I made use of new in-store technology	27%
I bought in specialized online shops	17%
I bought different products than usual	17%
I did my main groceries online	14%

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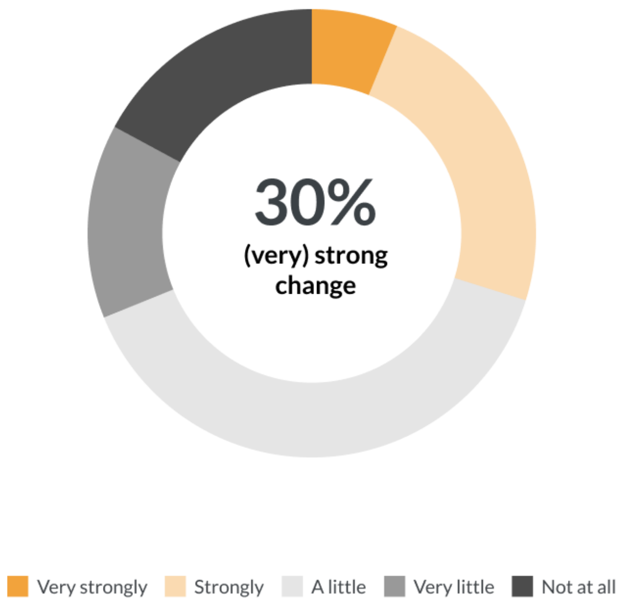
Findability: behavioral shocks

Drivers of behavior change

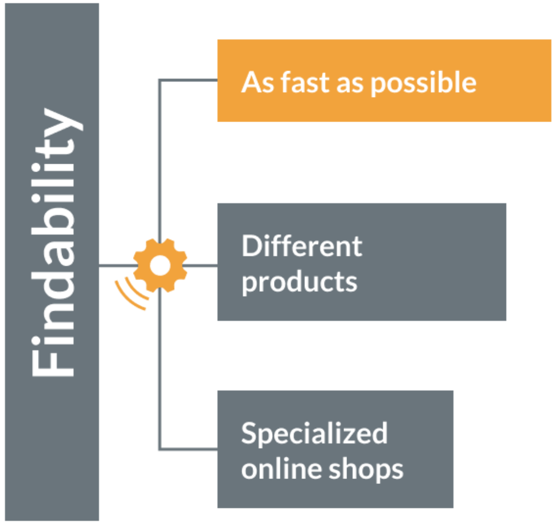
Findability
Touch points are under pressure.

How we shop has strongly changed in the past year: Speeding, changing the repertoire, and specialized online shopping have been the main shock behaviors.

Behavior Change
Past 12 months



EU-7
Top 3 change drivers



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Findability: what sticks in 2022

Expected behavior change

Findability
New routines, new routings

The main upcoming behavior is using technology in store, such as self-scanning. Making a shopping list is an established behavior that will continue to grow further. The shock shift to online will cease to grow further, as many new entrants will return to the physical store. Shopping at speed will persist.

In the next 12 months, I expect to...	EU-7 Net expectations*
Make use of new technology	+17%
Make a shopping list	+15%
Buy different products than usual	+11%
Shop as fast as possible	+1%
Shop in specialized online stores, like wine, petfood, beauty	-1%
Shop the main weekly groceries online	-5%

*expect to do (a lot) more -/- expect to do (a lot) less

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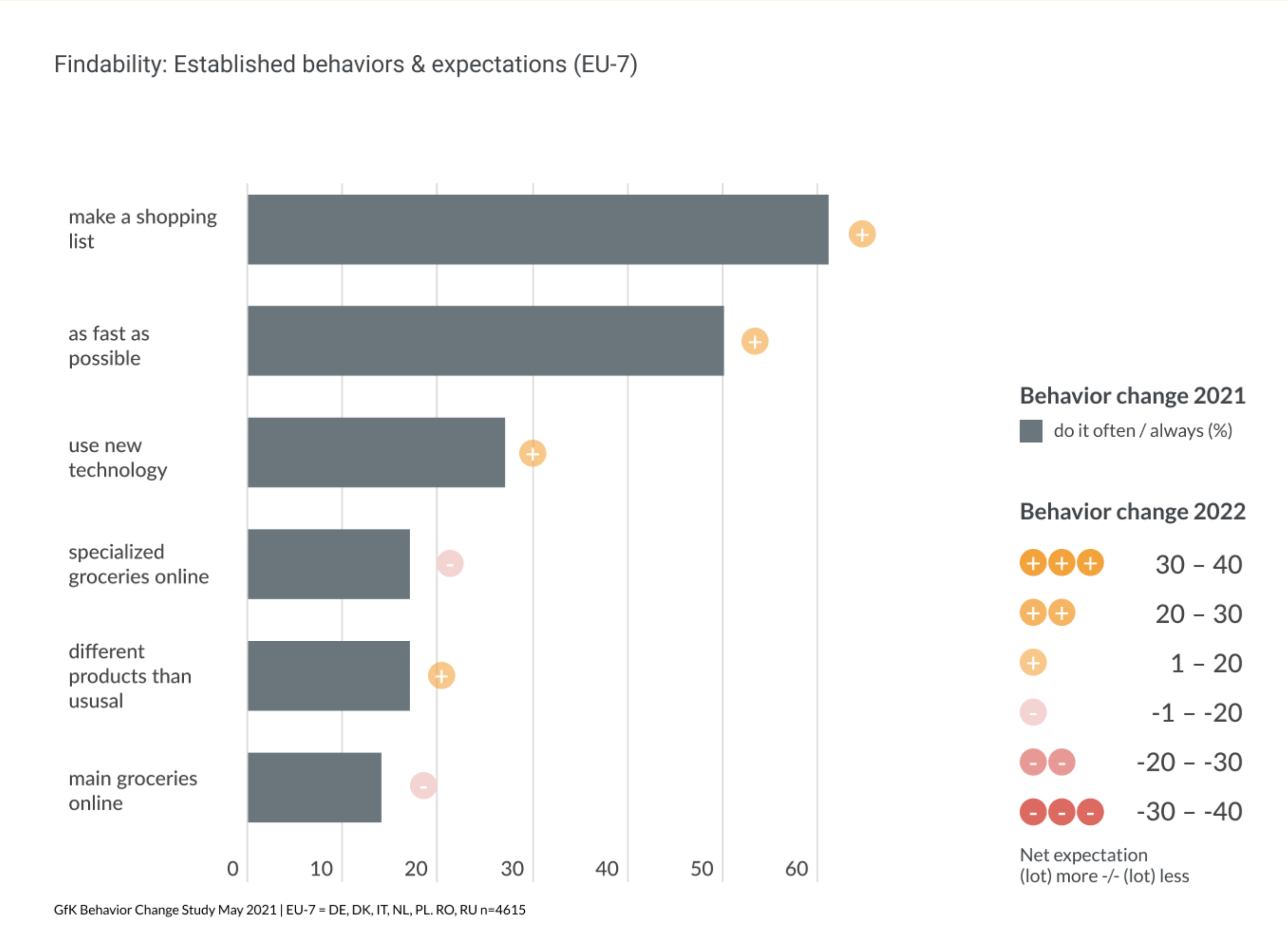
Findability: behaviors x stickiness

Key behaviors
Expected change



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Touch points under major pressure

Across Europe, over 3 billion trips less than usual

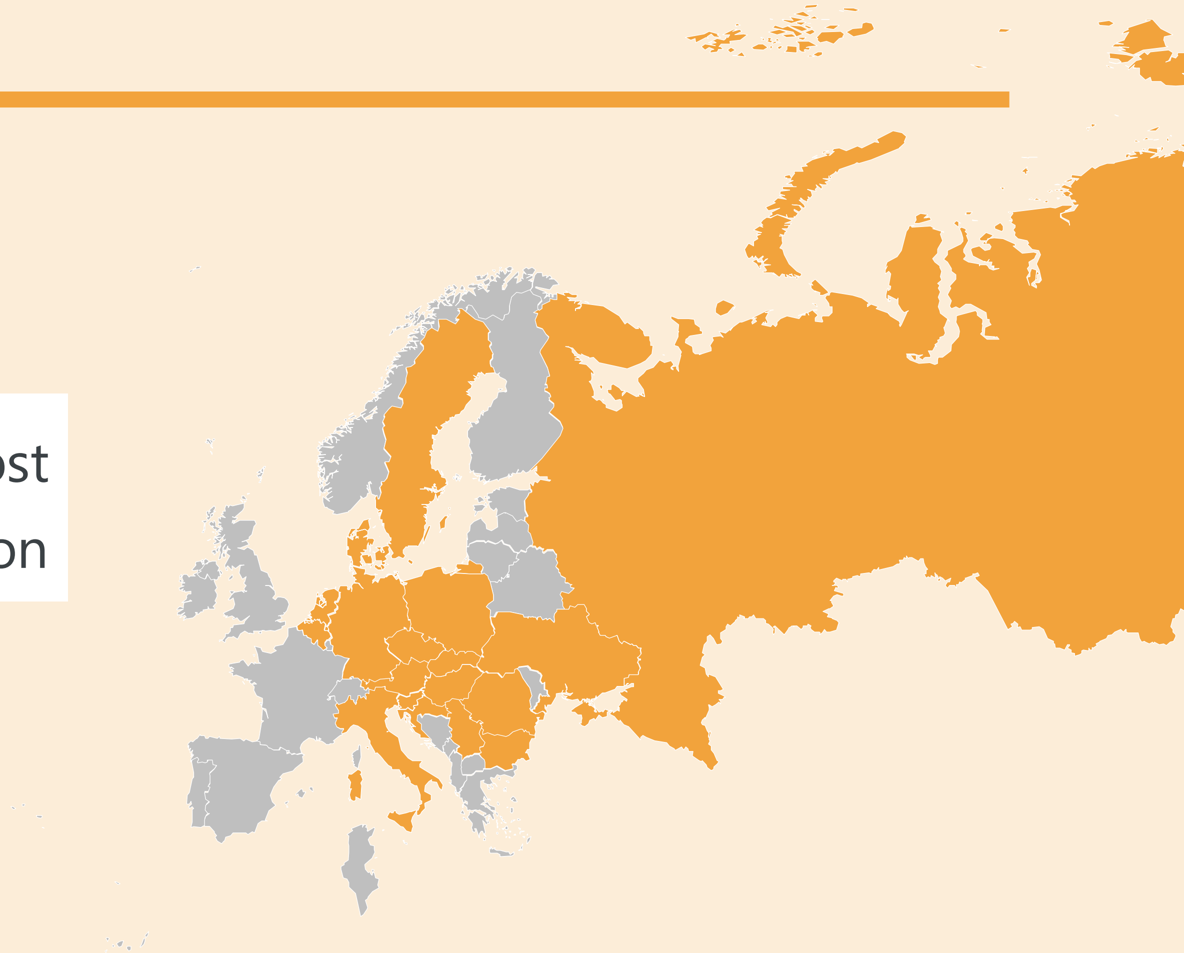
Total number of trips MAT Q1 2021 vs MAT Q1 2020 EU-17

Households

200 million

Ocassions lost

-3,4 billion

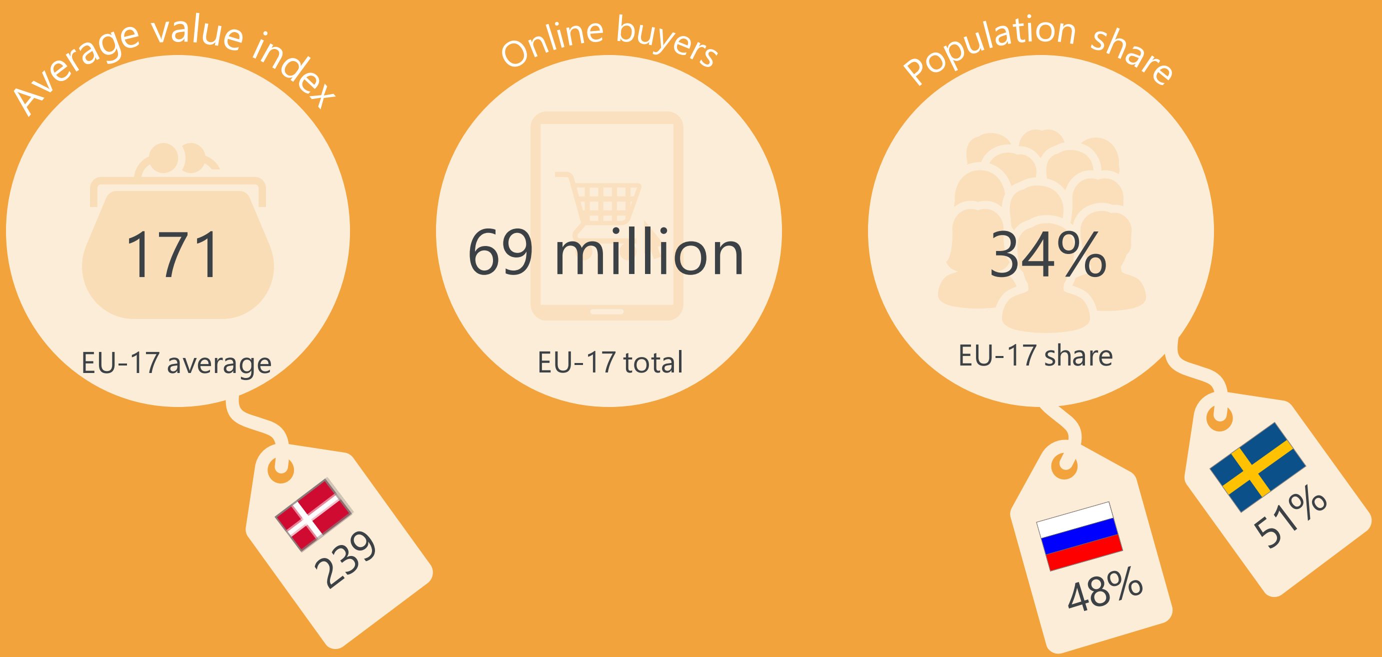


E-commerce growth accelerated

Easing lockdown regimes will stall growth at a new plateau

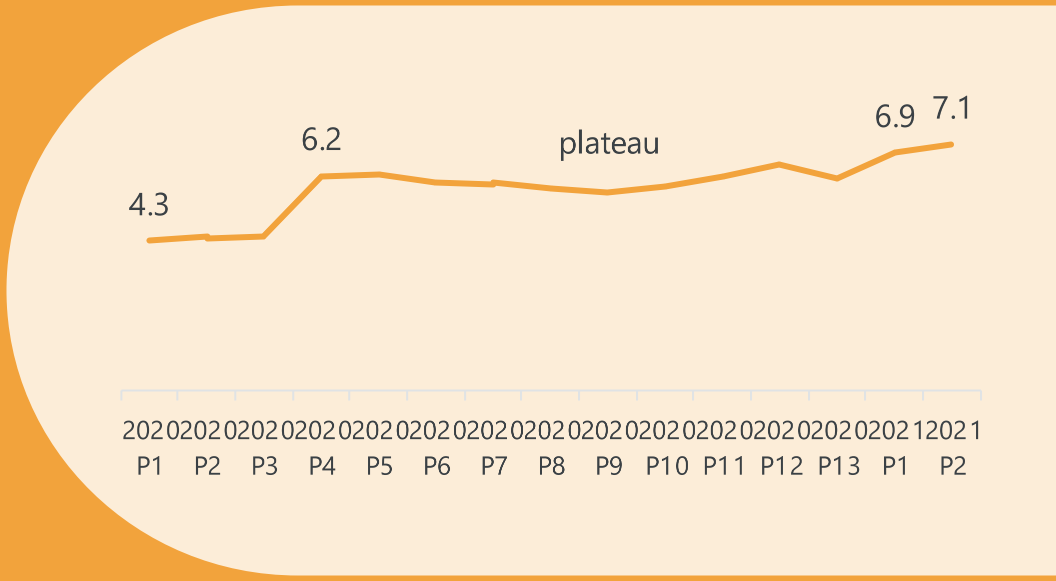
Lockdowns accelerated growth, but stabilization expected

E-com MAT Q1 2021 vs MAT Q1 2020 – EU-17



Lockdowns accelerated growth, but stabilization expected

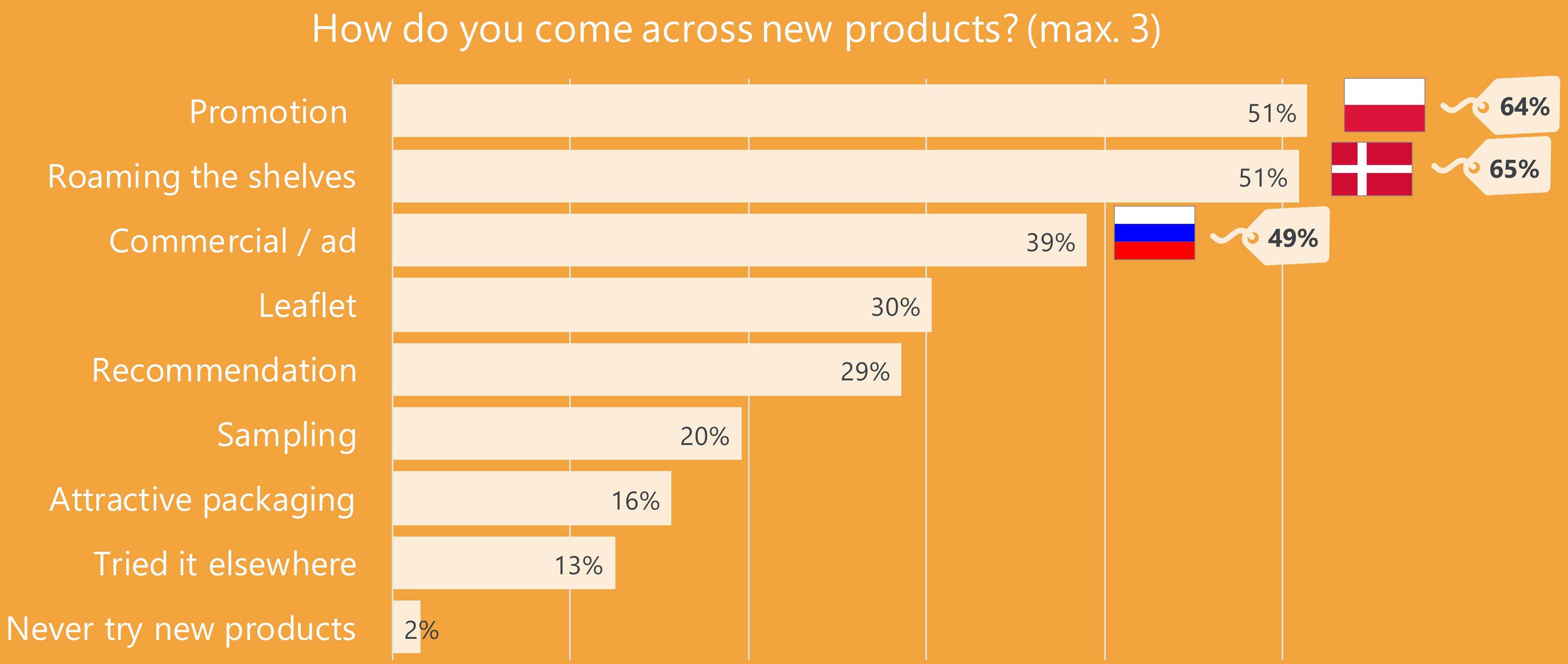
E-com value share by period 2020 – EU-6 Western Europe



Source: GfK Consumer Panels EU-17 | Europanel EU-6 (UK, FR, DE, ES, NL, IT)

Roaming the shelves is key for discovery

Hasty and planned shopping threatens product adoption



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Support omnichannel retail to stand out

Stand out

In-store touch points are under great stress. There is no time to waste. Make sure your **assortment heroes** are easy to spot and maximize their shelf space. Invest in **second placements** and activation for new products.

Prime pre-store

Up your game in **prestore marketing**. **Priming** your brand in shoppers' minds is ever more relevant in times of touch point depression. Focus on your strongest brand assets, with context-sensitive creativity.

Surprise

Online, shoppers hardly look beyond the first few results. **Occasion-based** secondary placement is vital for increased findability and discovery. Rethink the **sensorial wow-effect** in virtual buying: e.g. shared shopping, unboxing experiences.

Fluidity

Space and time have become more fluid. Home has become an office, school, store, restaurant and holiday destination at the same time. Working in the evenings, shopping during daytime or really late at night. An implosion of 9 to 5. **Fluid living** created new occasions and demands flexible solutions.

Fluidity: established behaviors 2021

Key behaviors
often/always

I had more meals at home

60%

At least one person worked from home more than before

38%

I snacked more than before

25%

I ordered more delivery / takeway meals than before

24%

I shopped at different time than before

29%

I shopped at different stores than before

16%

Different person(s) did the groceries

9%

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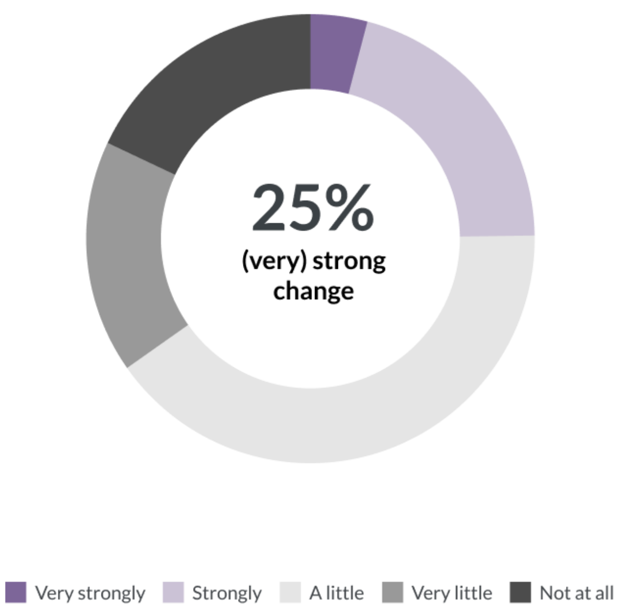
Fluidity: behavioral shocks

Drivers of behavior change

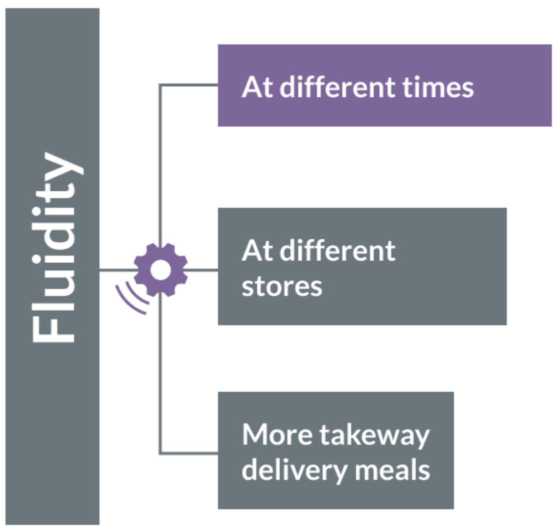
Fluidity
The home as the hub.

The stretch of our homes as schools, offices, restaurants and the consequent implosion of 9 to 5 living has been the most radical of all forces of change. Key shocks have especially been where and at what time we shop.

Behavior Change
Past 12 months



EU-7
Top 3 change drivers



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Fluidity: what sticks in 2022

Expected behavior change

Fluidity
The home as the hub.

In spite of the highly disruptive behaviors in the past year, fluid living and the shift in occasions will tone down. However, shopping at different stores, at different times will stick indeed!

In the next 12 months, I expect to…

	EU-7 Net expectations*
Shop at different times than used to	+4%
Shop at different stores than used to	+3%
Eat more meals at home	-6%
Order more takeaway / delivery meals	-10%
Different persons shop for groceries	-11%
Work in the home office more than before	-11%
Snack more than before	-21%

*expect to do (a lot) more -/- expect to do (a lot) less

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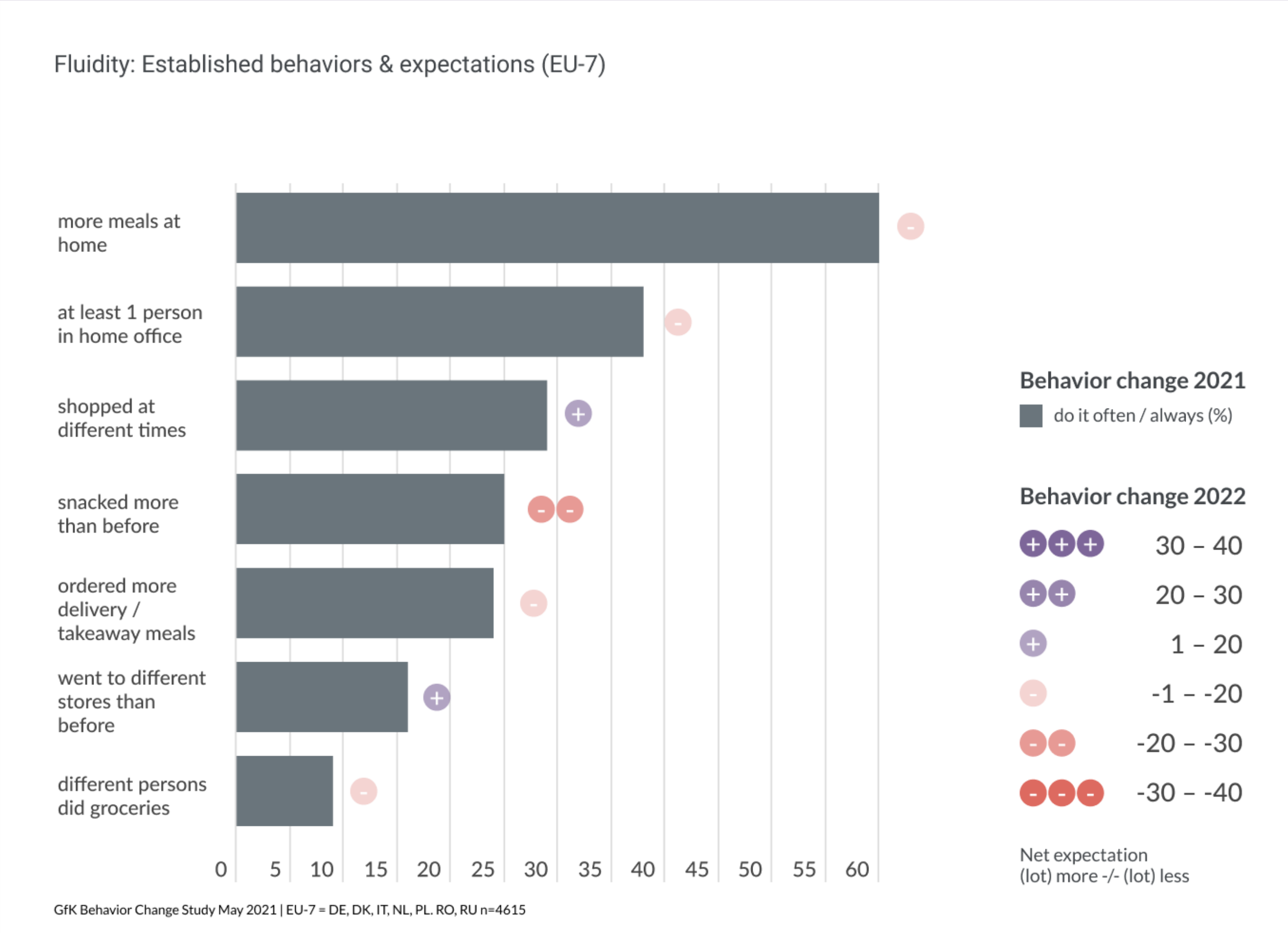
Fluidity: behaviors x stickiness

Key behaviors
Expected change

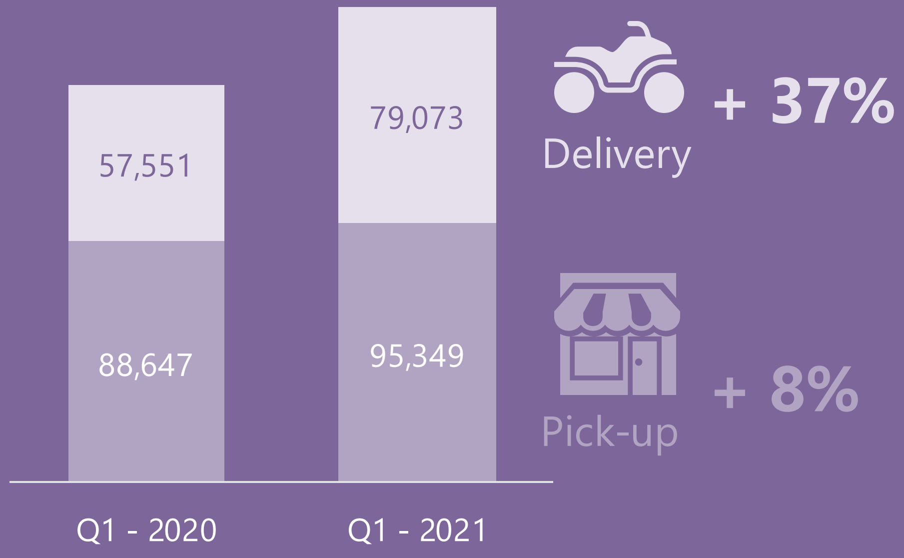


New habits create new opportunities

But back to 'normal' will mitigate the growth

Delivery occasions skyrocket

Occasions (x 1000 orders) NL



Source: GfK Pick-up & Delivery monitor NL 2021.vs. 2020

Major snacking categories salty snacks and chocolate have both gained share in total household spend on FMCG

Snacking

Salty snacks

+6% Share of wallet

Chocolate

+4% Share of wallet

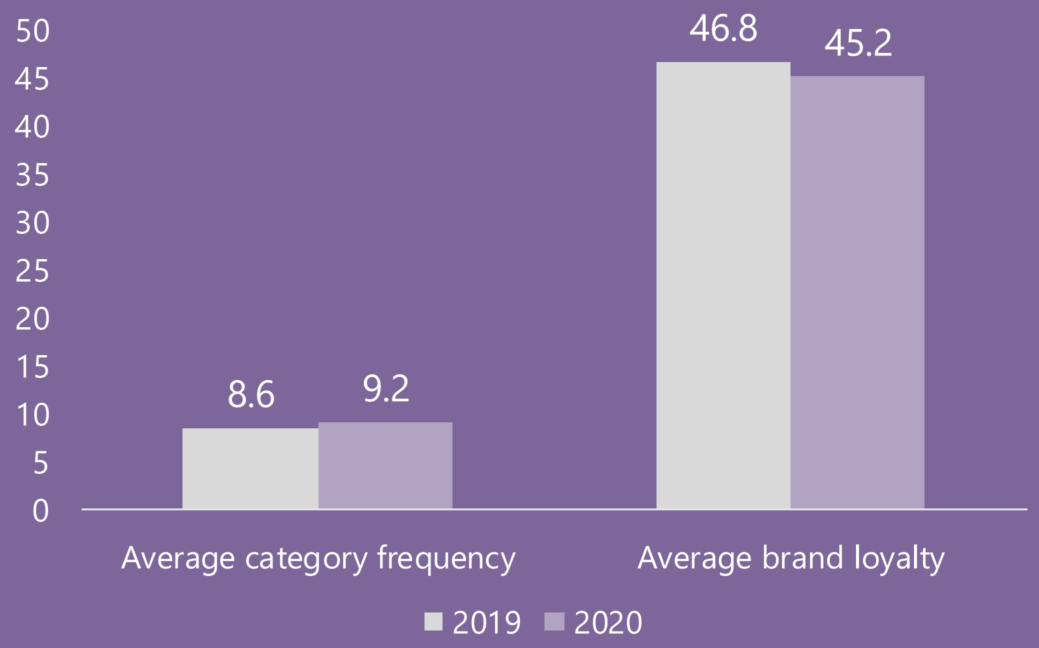
Source: GfK Consumer Panels EU-17 average MATQ1 21 vs MATQ1 20

Category incidence up, retailer choice down

Newcomer effect impacts brand loyalty

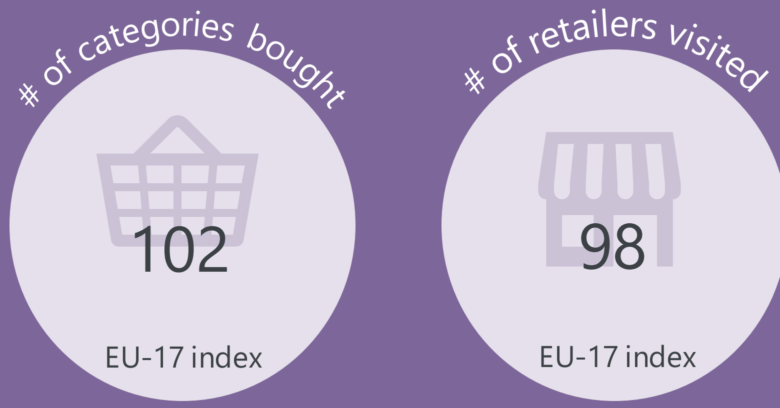
Category shopping frequency up, brand loyalty down

2020 vs 2019– Europanel BG20 3587 TOP 10 category brands DE, ES, IE, UK



More diverse shopping, concentrated at less retail banners

EU-17 FMCG data MATQ1 21 vs MATQ1 20



Source: Europanel BG20 data | GfK Consumer Panels EU-17 average MATQ1 21 vs MATQ1 20

Be ‘fluid’ in your market approach

Adapt

Shopping routines permanently changed due to increased fluidity. We see big baskets on weekdays, delivery and more (walking) occasions to convenience and specialty stores. Be sure your shopper **activation plans** evolve accordingly.

Portfolio Stretch

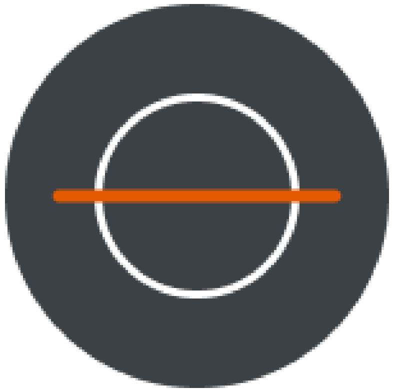
New occasions will partially stay. Whether it’s @home or stretch-you-legs lunch, coffee breaks, staycation essentials, or DIY beauty treatments, categories will be **stretched** beyond their traditional use.

Grab & Embrace

Newby shoppers have entered your competitive space. New, light category buyers are readily tempted to go for the brand leader. **Continuously recruiting** buyers should be your number one priority. Loyalty will follow.

Balance

The increasing **need to slow down** and take control has propelled new product categories and a restrenghtened focus on holistic health: both in body and mind. It's about **moderation and selfcare.** The trend towards a greater focus on natural, healthy beauty is coupled with a sense of post-pandemic, energetic, fresh **renovation of self.**



Balance: established behaviors 2021

Key behaviors
often/always

I paid special attention to my physical health
50%

I paid special attention to my mental wellbeing
49%

I moderated 'bad' food / drinks
43%

I paid special attention to labels / ingredients
41%

I took vitamins / supplements to improve my health
38%

I paid special attention to my look / appearance
35%

I used foods / drinks to improve my mood
29%

I searched for tips on healthy living and wellbeing
24%

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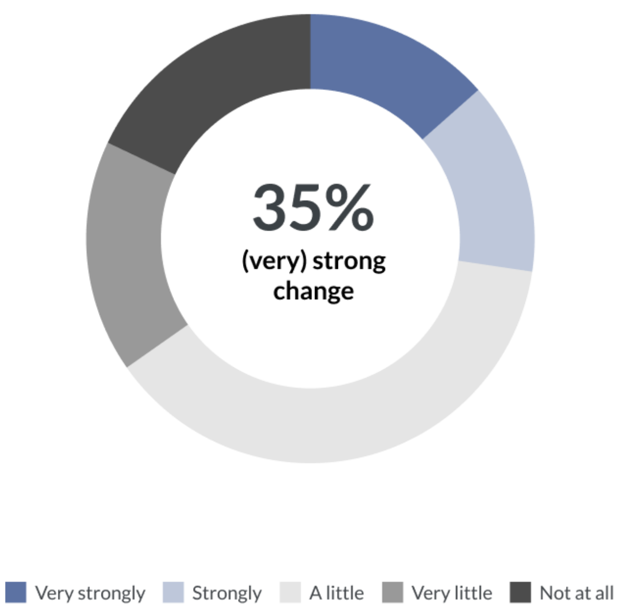
Balance: behavioral shocks

Drivers of behavior change

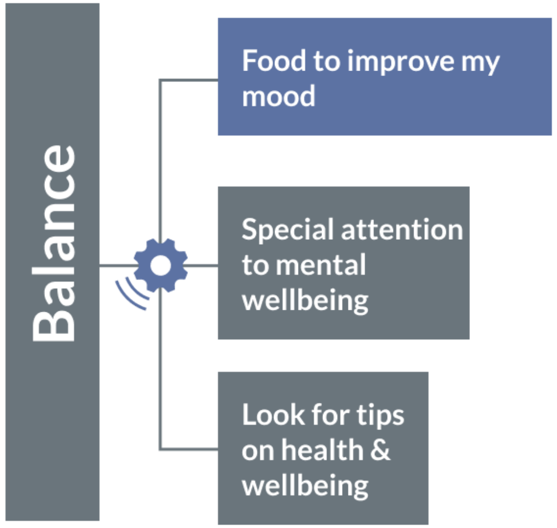
Balance
Wellbeing the mindful way

The area where the strongest behavior change is felt.This is especially driven by a renewed appreciation of food as an emotional stimulus, Secondly, mental aspects of wellbeing have come to the fore in these stressful times.

Behavior Change
Past 12 months



EU-7
Top 3 change drivers



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Balance: what sticks in 2022

Expected behavior change

Balance
Wellbeing the mindful way

Come the new normal, Europeans mostly want to regain control of their appearance via weight loss and moderation. Attention to mental wellbeing will also increase even further, as will our sense of control of our ingredient intake.

In the next 12 months, I expect to…	EU-7 Net expectations*
Pay special attention to my physical health	+47%
Moderate bad foods / drinks	+37%
Pay special attention to my look / appearance	+36%
Pay special attention to my mental wellbeing & happiness	+35%
Pay special attention to labels and ingredients	+34%
Take vitamins / supplements to improve my health	+19%
Seach for tips on healthy living and wellbeing	+15%
Use food / drinks to improve my mood	-4%

*expect to do (a lot) more -/- expect to do (a lot) less

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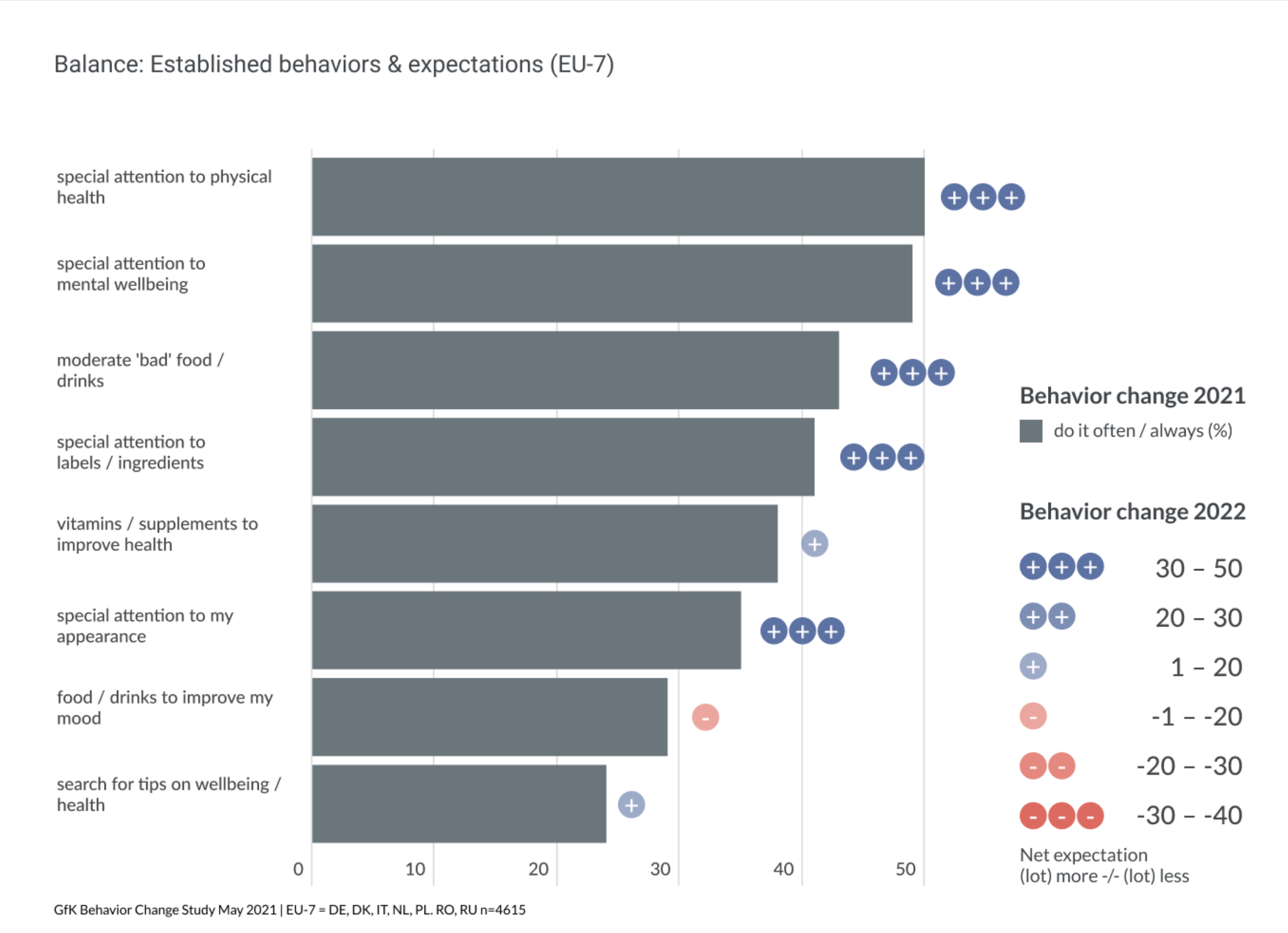
Balance: behaviors x stickiness

Key behaviors
Expected change



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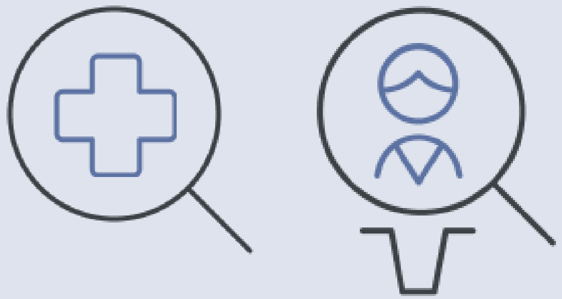
Desire to renovate the self

Post-cocooning, physical appearance prioritized

"(Up to 3) things you would like to do most"

- Take up a sport — 55%
- Lose weight — 46%
- Eat less meat — 36%
- Invest in a 'fresh' new look — 29%
- Practice mindfulness / yoga — 23%
- Drink less alcohol — 22%



Working on appearance is regaining grounds. 1 in 2 Europeans is looking to lose weight.

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Organic & “alternative” categories thrive

Europeans spend more of their FMCG budget on organic

Index MAT Q1 2021 vs MAT Q1 2020 – EU-17/EU-14

Penetration index
Non alcoholic beer
EU average
107

Absolute
share of wallet
9,2%

Share of wallet index
Organic FMCG
EU average
108

Source: GfK Consumer Panels EU-17

Anticipate on shoppers' desire to get fit

Portfolio reach

The traditional classification of "good for you" and "bad for you" is a thing of the past. It is **all about alternatives:** the healthier choice, the "I'm in the mood to cheat" choice, the "I deserve a treat' option, the veggie option…

Inform & facilitate

Consumers take more responsibility for their own wellbeing. Brands and retailers find new roles as facilitators. Cater to the expanding needs for on-pack information, natural, intuitive moderation and **preventative self-care**.

Think holistic

Explore how your products and service can help to **increase systemic health**. No longer just a 'thing' of an ageing population - the societal effects of the crisis have turned holistic health into an ageless pursuit. Fresh & bright post-crisis renovation of self.

Budgeteering

The years ahead will be marked by a need for **budget engineering** understood as **balancing budget, lifestyle demands and perceived quality**.
A large number of Europeans expect economic hardship while we are at the onset of serious price inflation. This will surely influence price sensitivity. Shoppers will choose to trade down on purely functional items, but will pay a premium when their lifestyle needs and values are reflected.

Budgeteering: established behaviors 2021

GfK

Key behaviors
often/always

Checked the prices of the grocery products I intended to buy	66%
Paid special attention to the quality of the products	63%
Tried to shop in stores with the best promotions	52%
Actively tried to keep the total amount of my shopping basket low	43%
Looked for products that have a special benefit for me: i.e. natural, with protein, limited edition, …	32%
Looked for private label / store brand alternatives	29%
Splurged on premium food, beverages and/or beauty products	28%

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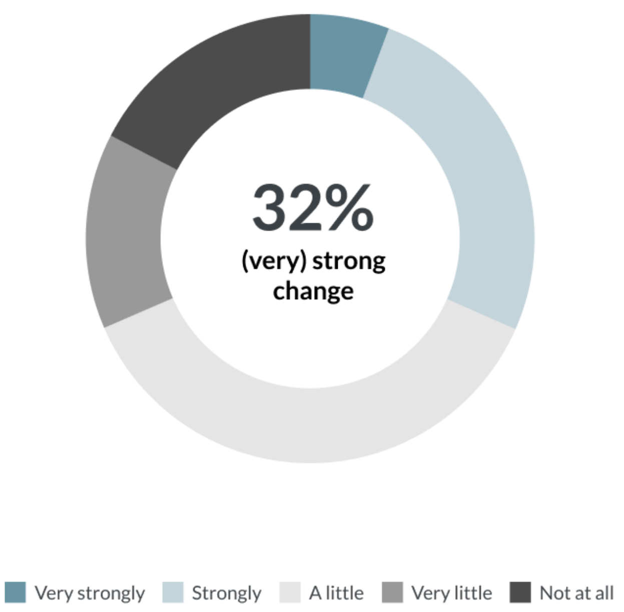
Budgeteering: behavioral shocks

Drivers of behavior change

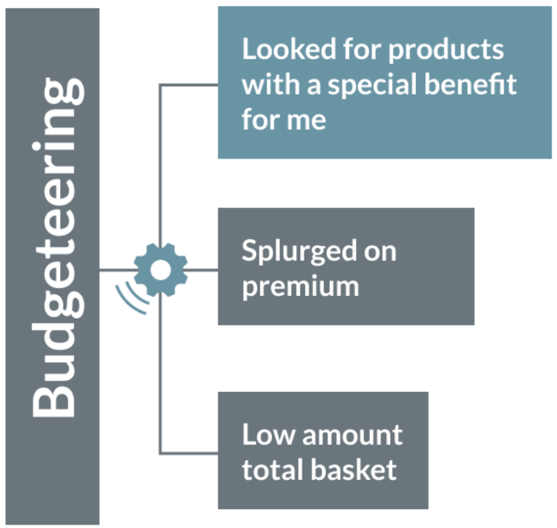
Budgeteering
Juggling cost and value.

1 in 3 Europeans have experienced a siginificant change in their budget-engineering behaviors. The rise in share of wallet of FMCG is reflected. Shoppers increasingly shifted to products with added lifestyle benefits, and willing to splurge.

Behavior Change
Past 12 months



EU-7
Top 3 change drivers



GfK ad hoc study Behavior Change EU-7 n=4615 May 2021

Budgeteering: what sticks in 2022

Expected behavior change

Budgeteering
Juggling cost and value.

The coming year, shoppers intend to pay extra attention to quality, emphasizing rising expectations. The willingness to splurge on premium does not cease, but there will be an increased price sensitivity. A solid price-quality ratio is key.

In the next 12 months, I expect to…	EU-7 Net expectations*
Pay special attention to quality	+32%
Check prices of the products I intend to buy	+27%
Try to shop in stores with the best promotions	+27%
Look for products with a special benefit for me	+21%
Keep amount of total shopping basket low	+20%
Look for private label – store brand alternatives	+15%
Splurge on premium food, beverage or beauty items	+8%

*expect to do (a lot) more -/- expect to do (a lot) less

GfK ad hoc study Behavior Change EU-7 n=4615 May 2021

Budgeteering: behaviors x stickiness

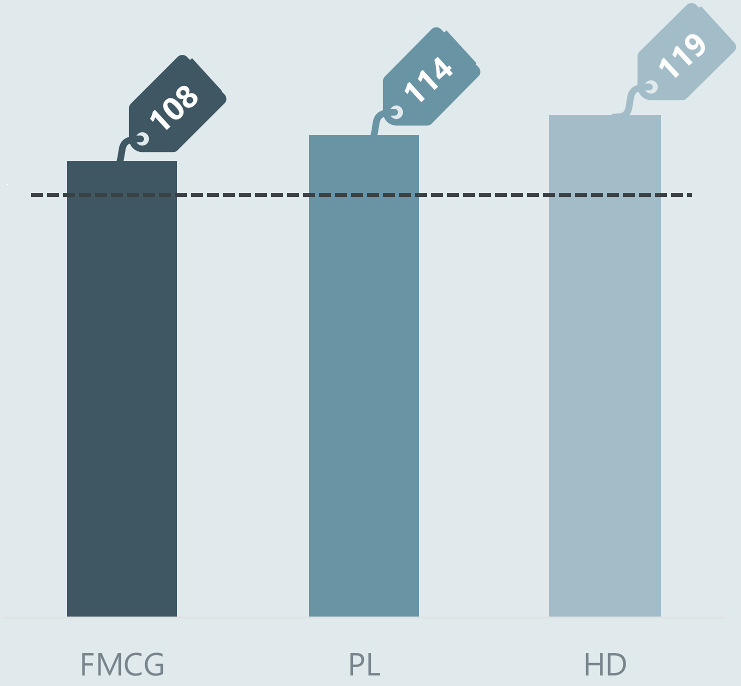
Key behaviors
Expected change

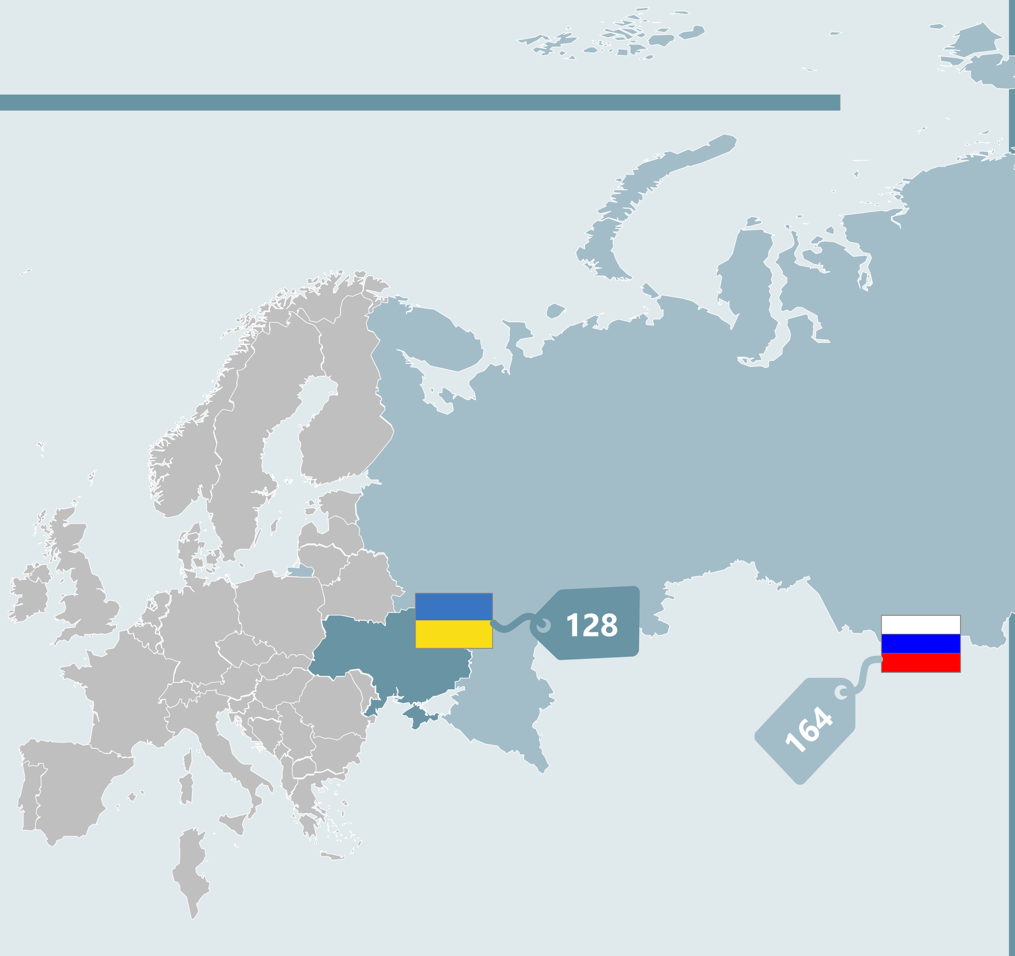
Growth paths differ in CEE and W-Europe

Private labels and Hard Discount gain grounds in CEE

Average value Index (MAT Q1 2021 vs MAT Q1 2020) – EU-17

EU-17

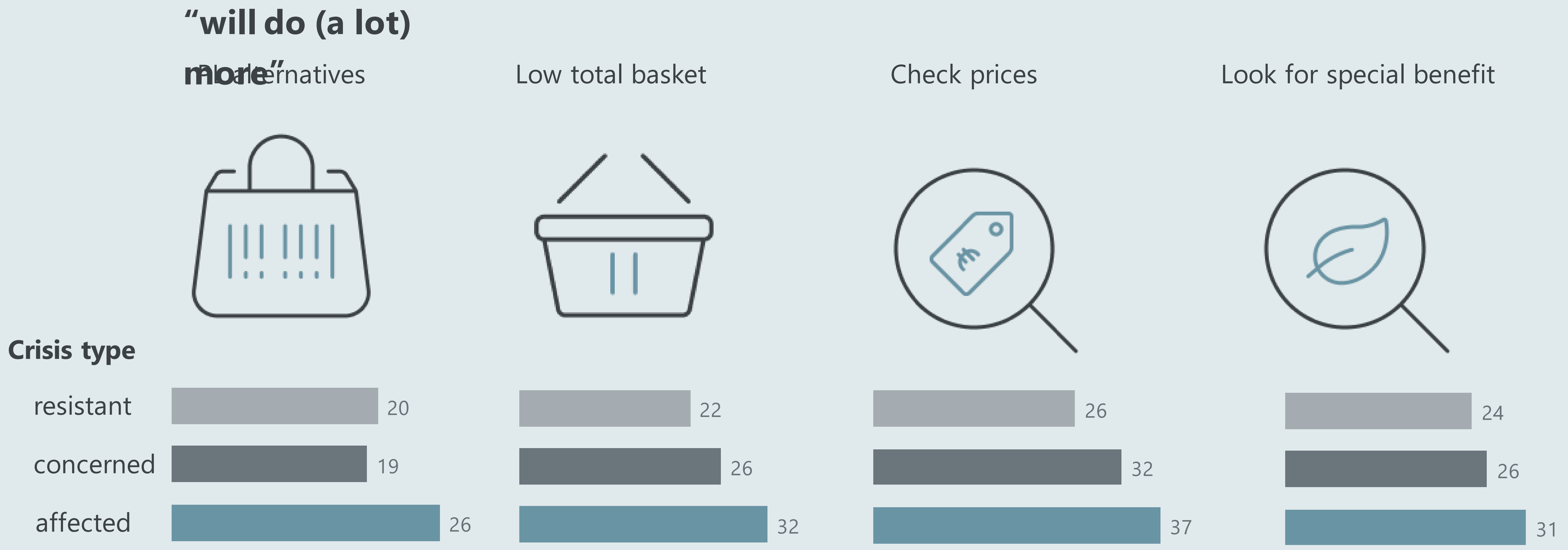




Source: GfK Consumer Panels EU-17

Economic concerns push budget sensitivity

But not at the expense of expectations on added value



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Polarization of needs

Communicate Benefits

Facilitate budget engineered shopping

Added value Private Label and Hard Discount offering

Despite budget pressure, shoppers are willing to pay a premium for products that reflect their needs. Be sure to communicate **benefits** rather than solely functional aspects. Store brands are geared up to fill the **added-value-for-money** gap.

Re-assess category management to reflect the need for budget-engineered shopping. Functional brands and added value brands need to be balanced. Total basket size will be under scrutiny, be sure to stimulate **big trips** while maintaining basket profitability

Hard Discounters face a challenge here, as added value is not a strong association. **Increasing the availability** of added-value propositions is a must to attract shoppers in times of one-stop (creative) shopping.

Purpose

Choice hierarchy is proving to be less defined by price, but all the more by the **reflection of values**. Shoppers increasingly look for brands and products that smoothly combine lifestyle demands with business for good. **Purposeful purchasing - at the expense of functional purchasing - is here to stay.**

Purpose: established behaviors 2021

GfK

Key behaviors
often/always

Switched to locally produced products	37%
Bought brands that care about animal welfare	37%
Bought brands that care about the environment	30%
Bought brands that promote social equality	23%
Look to others for inspiration how to make a difference	23%
Looked for information about the impact of brands I buy	22%
Stopped buying products because of the amount of packaging	20%

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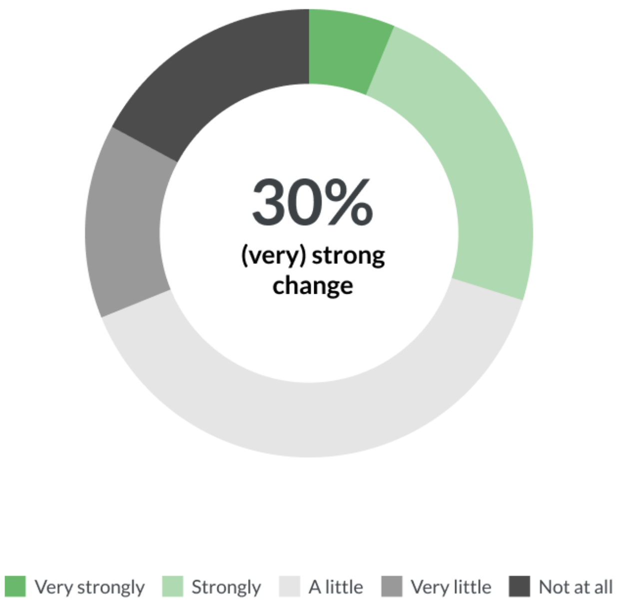
Purpose: behavioral shocks

Drivers of behavior change

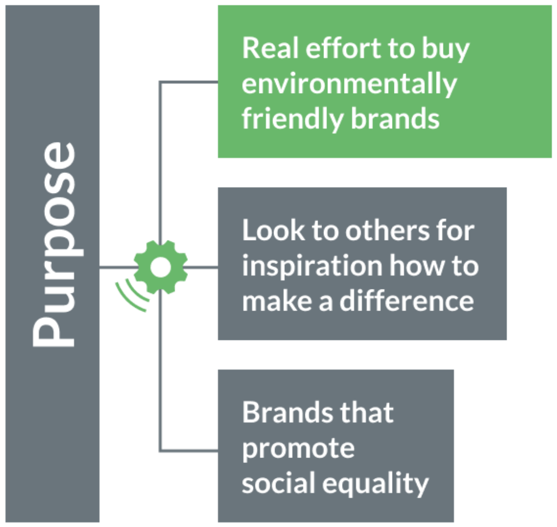
Purpose
Seeking brands with purpose

Nearly 1 in 3 Europeans have further altered their behavior towards more sustainable and equitable purchasing last year, representing a progressive shift. Both environmental and social purposes are key change drivers. Interestingly, so is the search for inspiration.

Behavior Change
Past 12 months



EU-7
Top 3 change drivers



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Purpose: what sticks in 2022

Expected behavior change

Purpose
Seeking brands with purpose

Most behaviors behind this future force for change will significantly increase in 2022. Buying local, eco- and animal-friendly top the chart.

In the next 12 months, I expect to…	EU-7 Net expectations*
Switch to locally produced products	+35%
Real effort to buy environmentally friendly brands	+33%
Real effort to buy brands that care about animal welfare	+31%
Look for information about the impact of brands	+26%
Stop buying products because of the amount of packaging	+25%
Real effort to buy brands that promote social equality	+24%
Look to others for inspiration how to make a real difference	+22%

*expect to do (a lot) more -/- expect to do (a lot) less

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Purpose: behaviors x stickiness

Key behaviors
Expected change

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Eco-activism keeps rising

Delicate balance between caring & doing: trust remains an issue

19% Knows
Can name a brand that is eco-friendly

25% Trusts
Trusts company claims about their environmental practices

24% Does
1 in 4 Europeans is an eco-active in FMCG

38%

16% 2019
20% 2020
40% 2025

By 2025, 40% of global population will be eco-active!

"Main responsible to act when it comes to protecting the environment"

40% manufacturers

20% consumers

WCWD 2020 EU-10 / Conaumer Life 2020

Acting green resistant to economic uncertainty

1 in 3 intends to “green up”

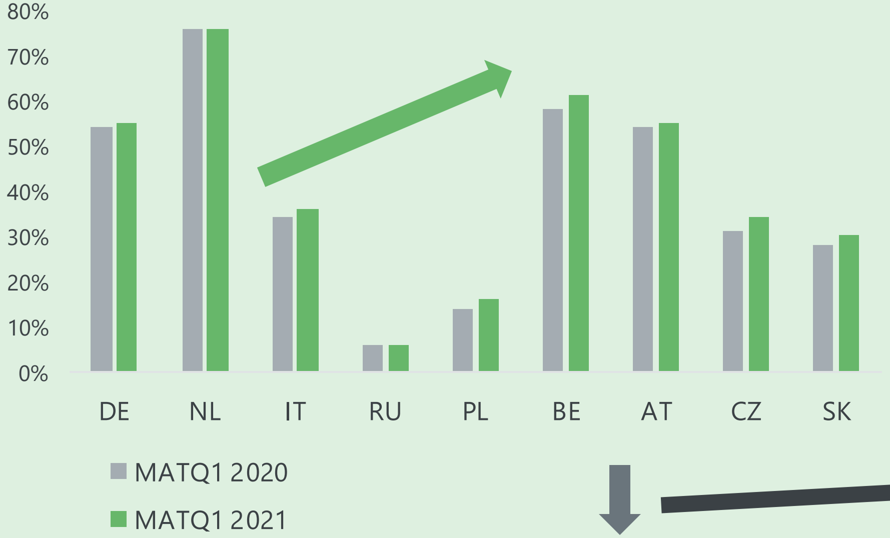
“will do (a lot) more”

Buy eco-friendly brands

Eco-active buying swings both ways

Safety needs interfered, convenience and moderation accelerated

The need for hygiene & food safety drives the value shares of **prepacked fruit & vegetables** up



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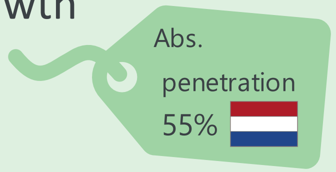
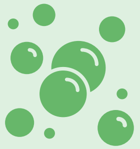
Meat replacers penetration growth

EU-14 average MATQ1 21 v MATQ1 20

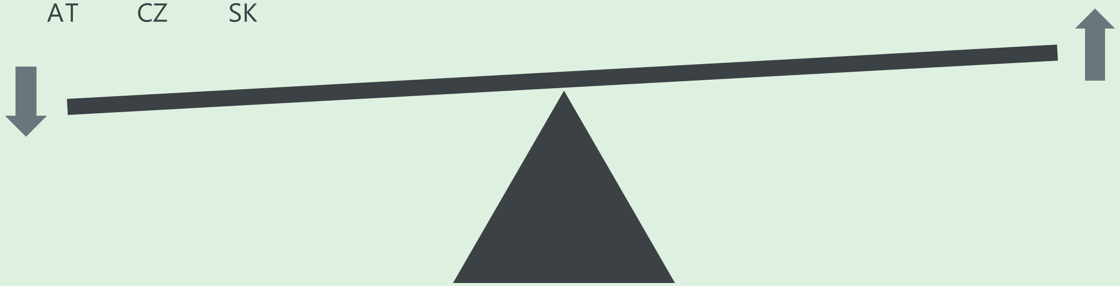




-100 liters per year

Average volume loss in bottled water per buyer

If active user of Sodastream(like) machines in Germany



Evidence: purpose brands drive growth

And do so with much less promotion pressure

Brand type	Revenues rate of change	Promo share revenues rate of change	
Sustainable Brands	+19%	-11% (Promo share rev.: 10%)	Brands with a commitment to sustainability that goes beyond the actual product e.g. own initiatives
Purpose Brands	+23%	-11%	Brands with a sustainable focus combined with shoppers' lifestyle demands
Hybrid Brands	+12%	-4%	Product Brands that have an additional benefit for the shopper and/or an initial focus on sustainability
Product brands	+9%	-3% (Promo share rev.: 26%)	Mainly major traditional brands with traditional strengths such as quality and shopper trust
Private Labels	+9%	+/-0%	
Total FMCG*	+ 10%	-3%	

Source: GfK Consumer Panel Germany | Brand types - hierarchy of needs | YTD November 2020, * excluding shares of fresh goods, generic brands

Purpose is a sociocultural value

Glamourous green

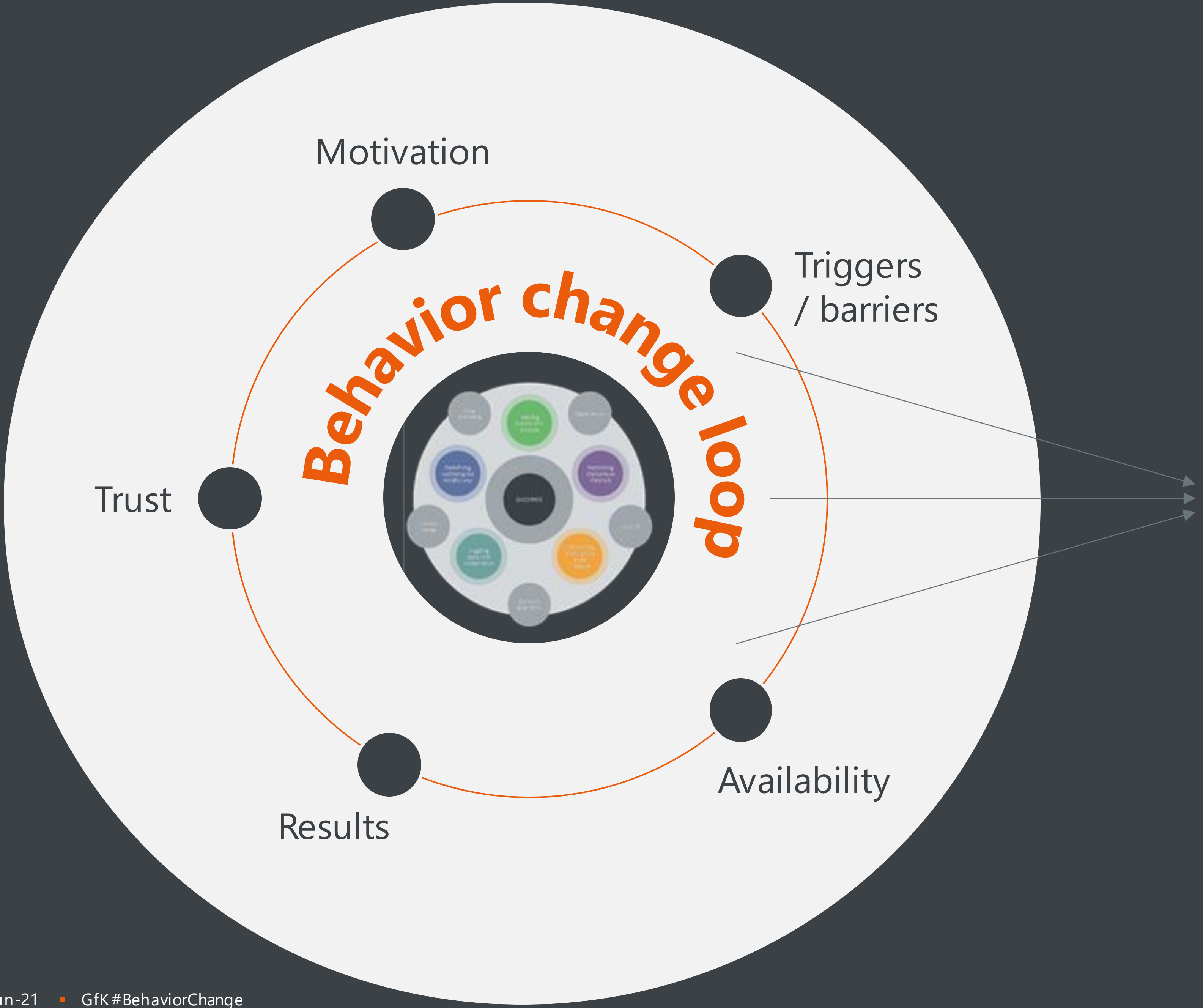
In the past, acting eco-friendly often implied trade-offs. Nowadays, it is considered as a freedom of (lifestyle) choice. **Enrichment** rather than restraint. Purpose brands tap into this positive sentiment: “my favorite drink and it is even carbon- neutral!”

Unite to build scale

As eco-social consciousness becomes more mainstream, so is the offer of sustainable brands. The demand for transparency and accountability will increase the need for **trusted benchmarking**.

Make it visible

Be sure to differentiate your strategy per category. **Plastic-reduction** remains the top topic, but focused solutions are needed. Recognition, information and convenience are key in mainstreaming eco-active behaviors. So is uniting in the results.



#BehaviorChange

We are here to help you seize the change with our insights along the behavior change loop

#GrowthfromKnowledge

Contacts

Lenneke Schils

Global Insights Director

Lenneke.Schils@gfk.com

Austria	**Christina Tönniges**	Cristina.Toenniges@gfk.com
Belgium	**Kim Scholart**	Kim.Scholart@gfk.com
Bulgaria	**Irena Yankova**	Irena.Yankova@gfk.com
Croatia	**Mirjana Perovic**	Mirjana.Perovic@gfk.com
Czech Republic	**Ladislav Csengeri**	Ladislav.Csengeri@gfk.com
Denmark	**Myriam Martensen**	Myriam.Martensen@gfk.com
Germany	**Christiane Wolframm**	Christiane.Wolframm@gfk.com
Hungary	**Andrea Földvári**	Andrea.Foldvari@gfk.com
Italy	**Alessandra Bocchi**	Alessandra.Bocchi@gfk.com
Netherlands	**Joeri van den Broek**	Joeri.vandenBroek@gfk.com
Poland	**Ewa Sech**	Ewa.Sech@gfk.com
Romania	**Aura Matei**	Aura.Matei@gfk.com
Russia	**Elena Myagkova**	Elena.Myagkova@gfk.com
Serbia	**Mirjana Perovic**	Mirjana.Perovic@gfk.com
Slovakia	**Ladislav Csengeri**	Ladislav.Csengeri@gfk.com
Sweden	**Myriam Martensen**	Myriam.Martensen@gfk.com
Ukraine	**Marina Zabarilo**	Marina.Zabarilo@gfk.com