VERBRAUCHER STUDIE 2004

Consumer Study
2004

Contents

2004 Consumer Study

Every two years since 1994, the Berliner Verlag has carried out a 'consumer study', Berlin's largest market analysis. In addition to a long-term view of the Berlin market as a whole, the study also permits a separate view of developments in the two halves of the city. Over 4,000 Berliners aged 14 or over were interviewed in east and west Berlin between March and May 2004; the results of the study are representative for 2.6 million of the city's inhabitants.

We would like to invite you to find out more about positions and changes on the Berlin market and to use the results of the Consumer Study for your communications planning.

We will be pleased to assist you in evaluating questions.

All you had to do is call us, send us a fax or an e-mail.

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Your market and media service

Introduction

As images and attitudes of brands and companies substantially influence the purchase decisions of consumers, the ‘2004 Consumer Study’ also contains a presentation of how awareness, liking and buying converge.

Awareness of a shopping street or a company forms the prerequisite for the emergence of an attitude, an image, and leads to the first question "How firmly is something anchored in the relevant set of consumers?”

Liking reflects the emotional assessment of the consumer. It is an indicator for closeness and can indicate a positive or a negative basic attitude. A strong degree of liking is an important factor in purchase decisions.

The actual act of buying is the most intensive contact between consumer and company. This is the point at which concrete experiences take place which essentially shapes the willingness to make further purchases.

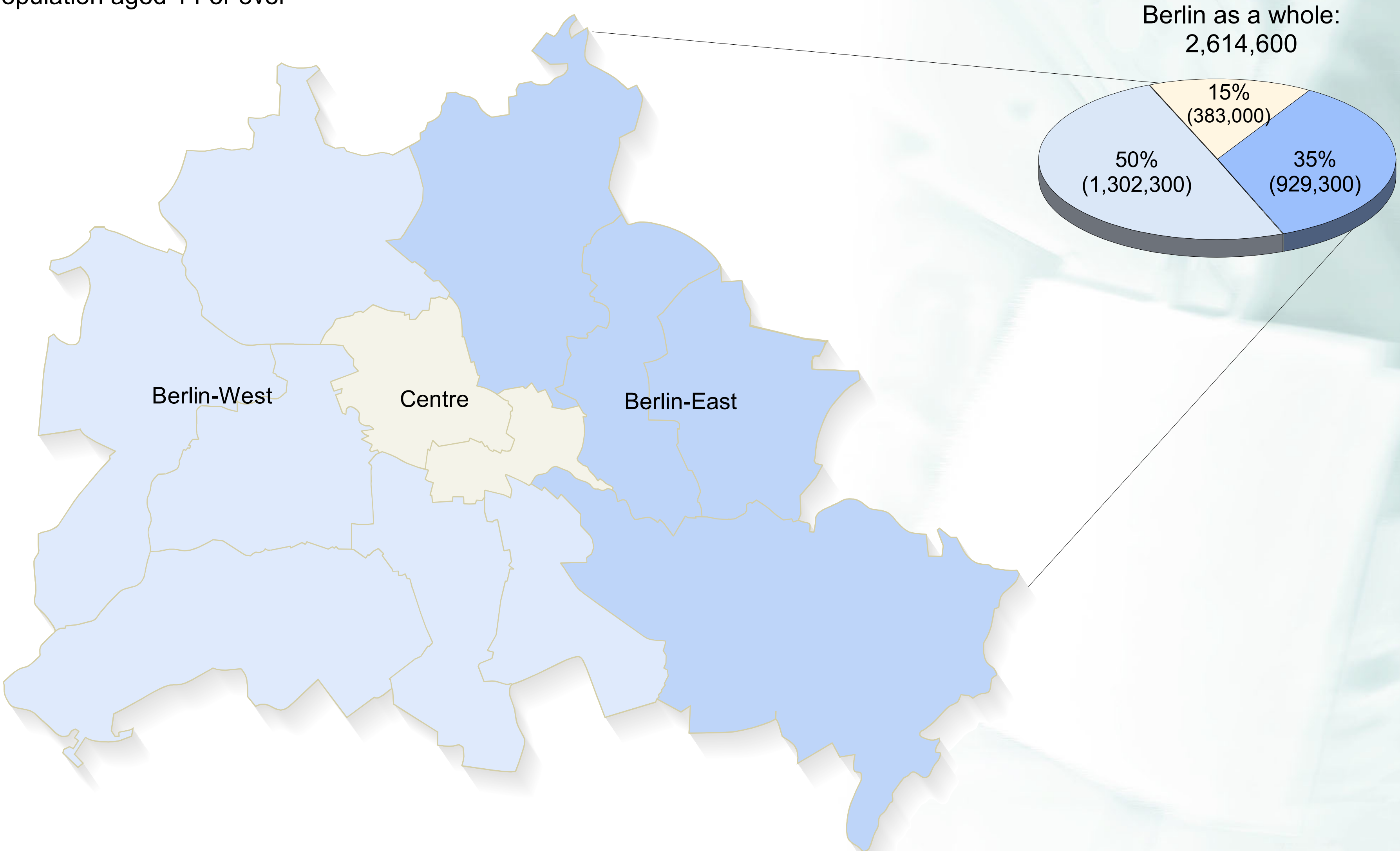
Finally, assessments based on statements on qualitative criteria such as choice, service quality or value for money come together to form complex brand images. Do Berliners from the two halves of the city have different perceptions? What role does the company in question currently play in the awareness of consumers?

This study provides answers to these and other questions.

Sociodemography

West / East

Berlin population aged 14 or over



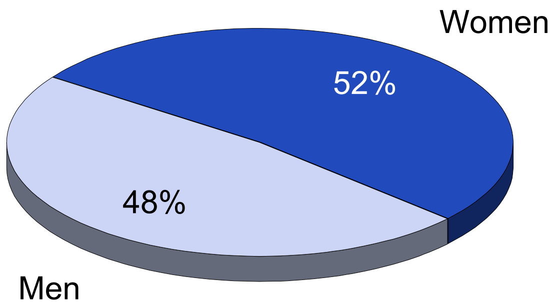
Approximately 2.6 million Berliners over the age of 14 live within the Berlin city limits; 50% of those live in the city's central and Eastern districts.

Source: 2004 Consumer Study

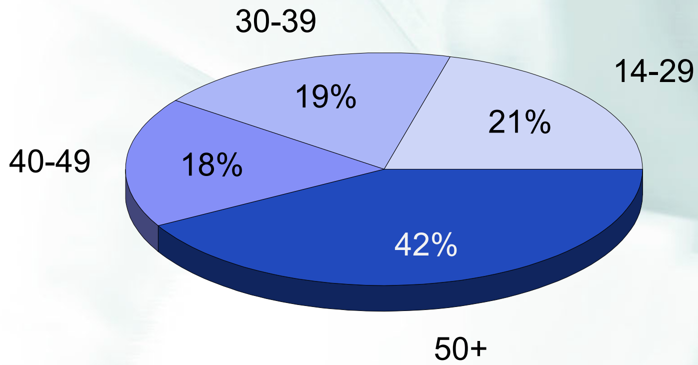
Demography

Berlin as a whole

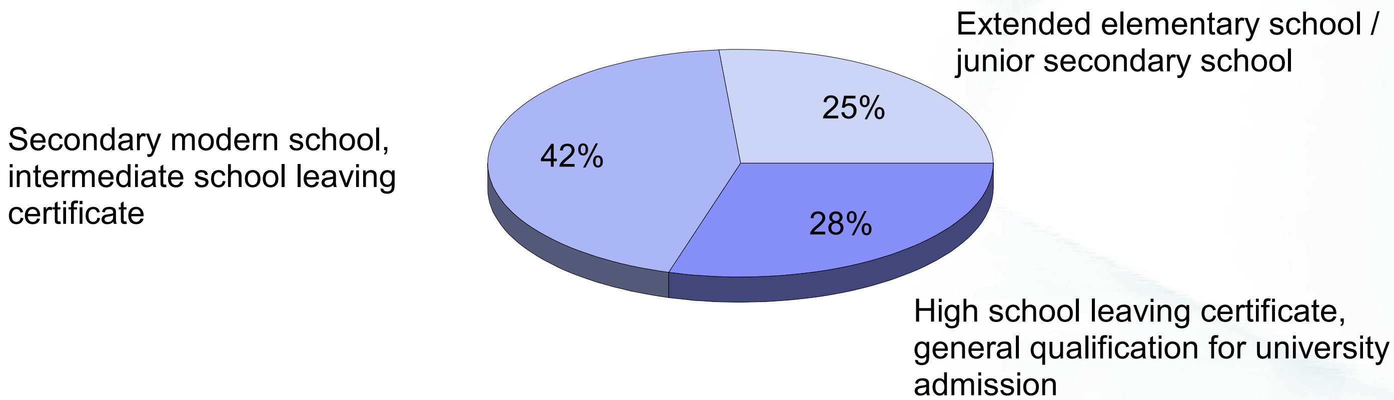
Gender



Age



Education



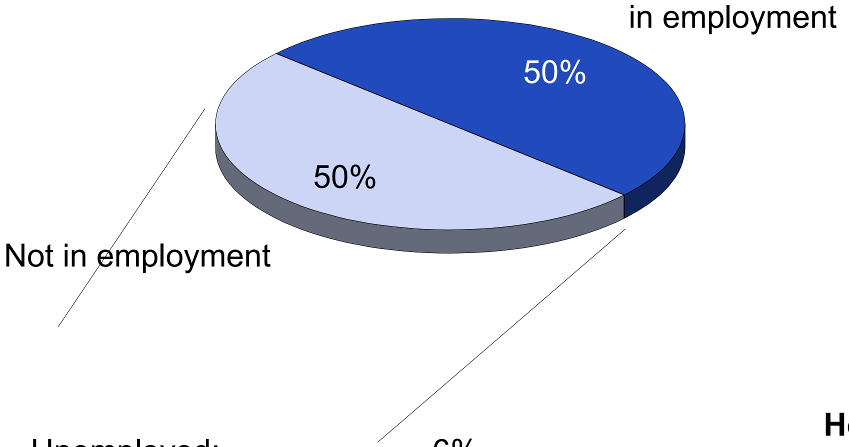
Four in ten Berliners are over 50 years old and over 70 % have education beyond the minimum required by law.

Source: 2004 Consumer Study

Demography

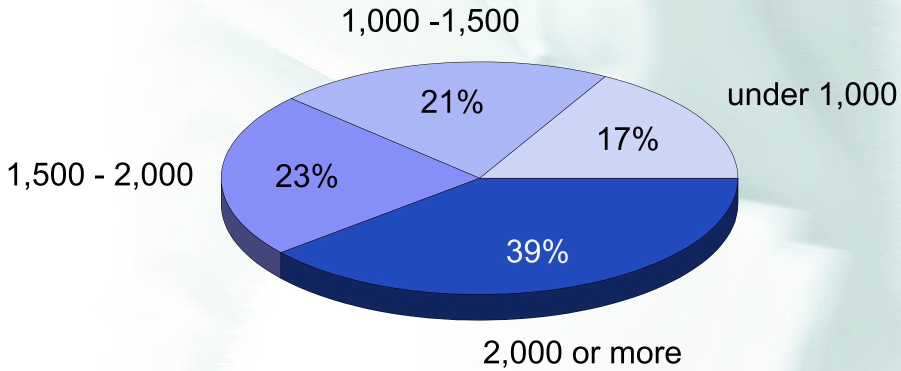
Berlin as a whole

Employment

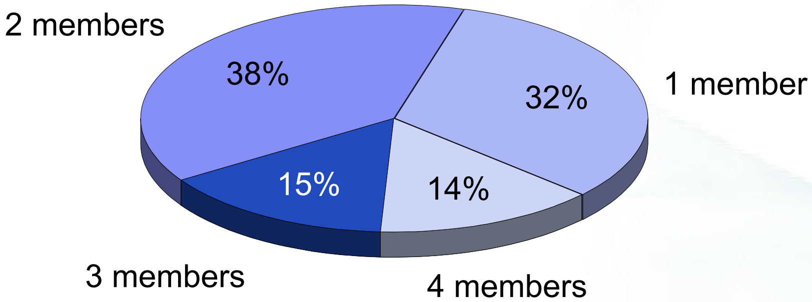


Unemployed:	6%
Retired:	28%
Training/studying:	11%
Not in employment:	5%

Net household income in Euro



Household Size



Every second Berliner employed at present and nearly 40% of households have a monthly net income of at least 2,000 Euro.

Source: 2004 Consumer Study

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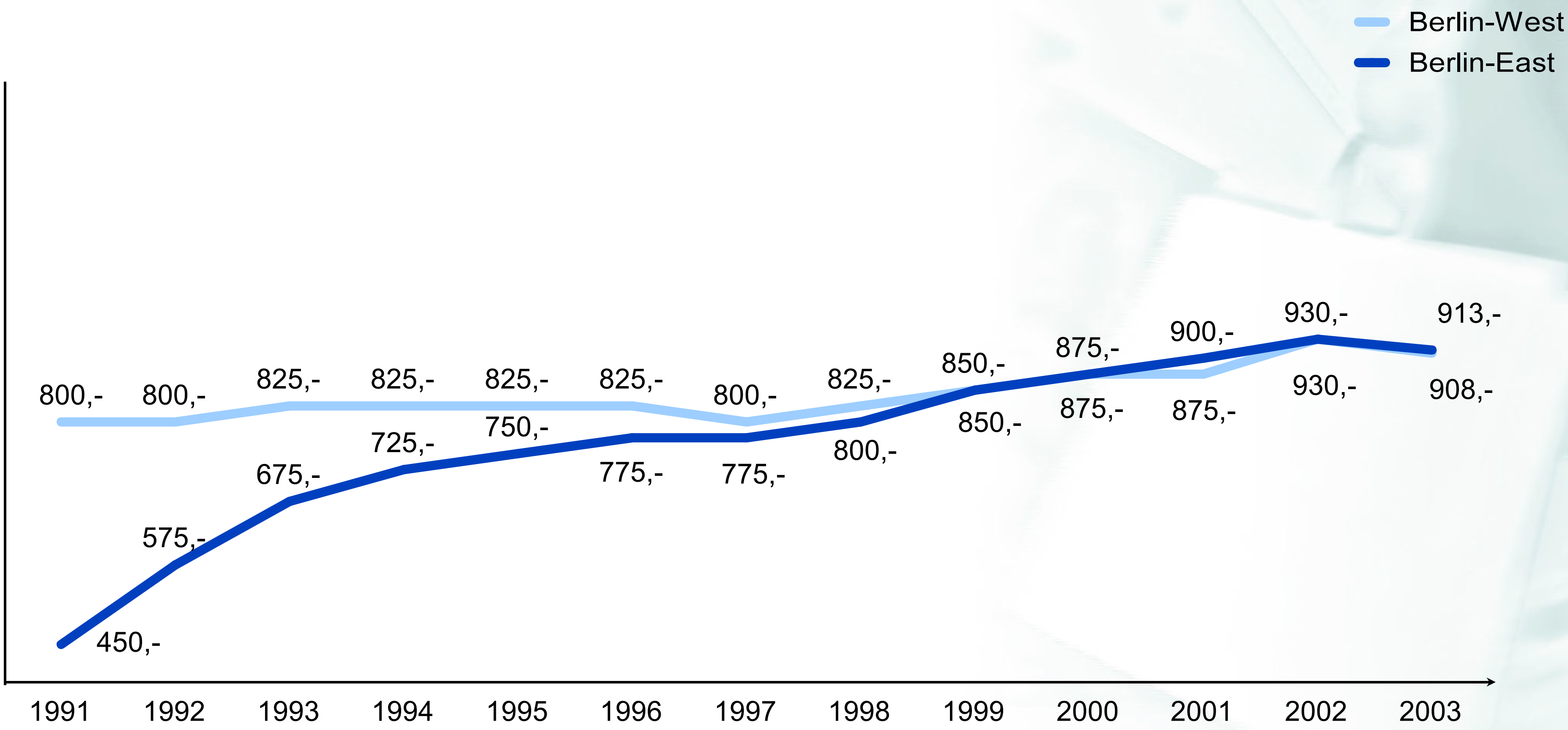
Berliner Zeitung

Per-capita income

Development 1991 - 2002

In Euro



Monthly net income in the city's Eastern districts has almost doubled in the last ten years and at currently € 913.-- is higher than the average per-capita income in West Berlin.

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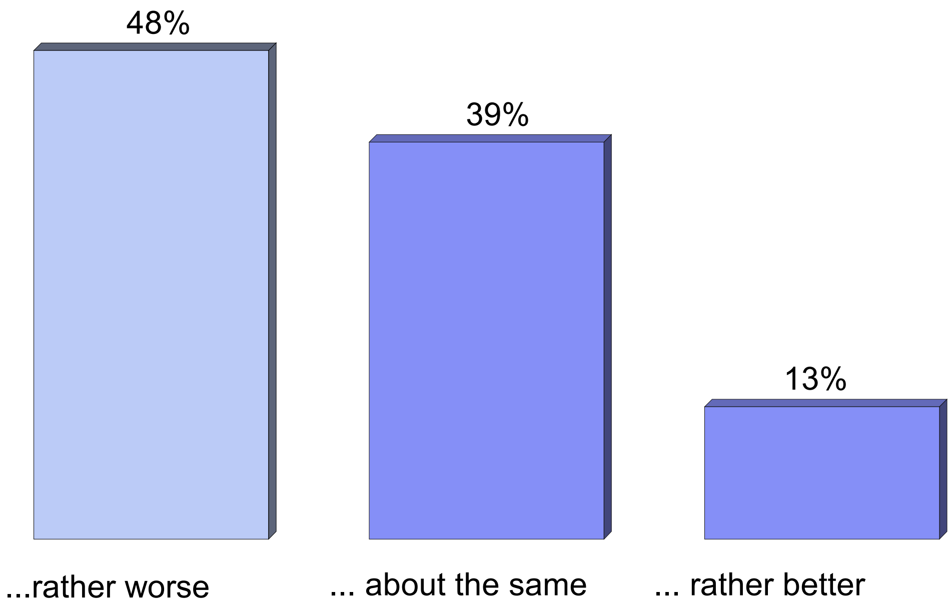
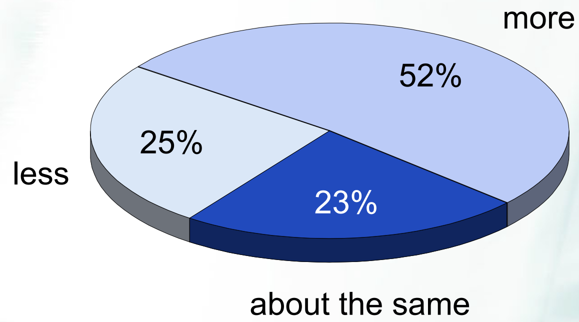
Source: Statistisches Landesamt Berlin (Berlin Statistics Office), 2004; since 2002 middle excl. the new East-/West mixtured districts Friedrichshain-Kreuzberg and Mitte

Perspectives

“How would you describe the development of your personal economic situation within the last two years?“



“Did you/your household spend more, about the same or less money within the last two years?“



Despite all pessimism: about 40% of Berliners describe their current personal economic situation equal to the one of two years ago, and only 25% spent less money in the past two years.

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Source: 2004 Consumer Study

Shopping Streets

Shopping Streets

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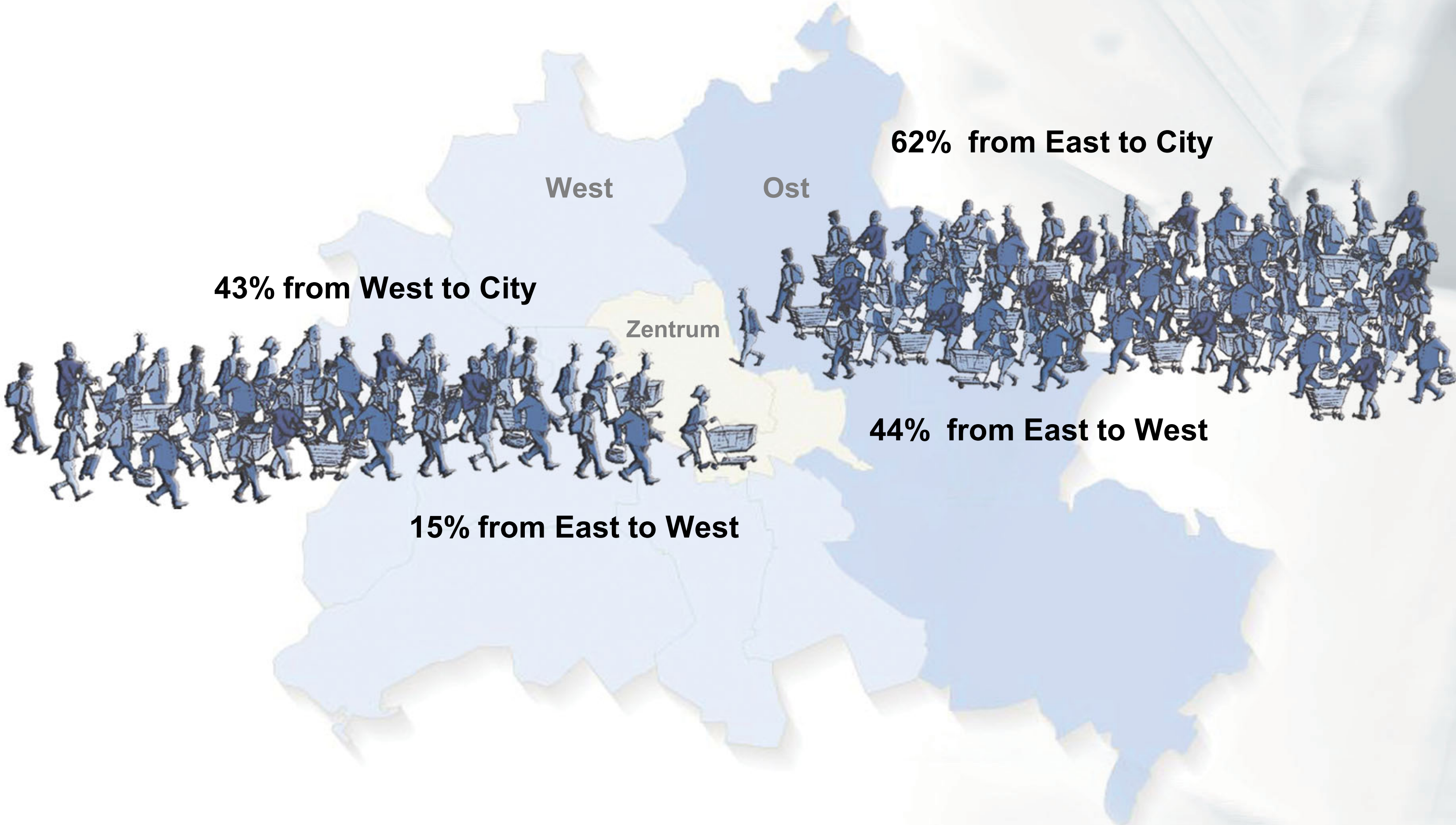
Berliner Kurier Berliner Zeitung

Consumer flows

Shopping at least 1x a month



East Berlin consumers continue to be much more mobile than their neighbours in the Western part of the city.
In other words, they constitute a large buyer potential for companies located in the city and in the West.

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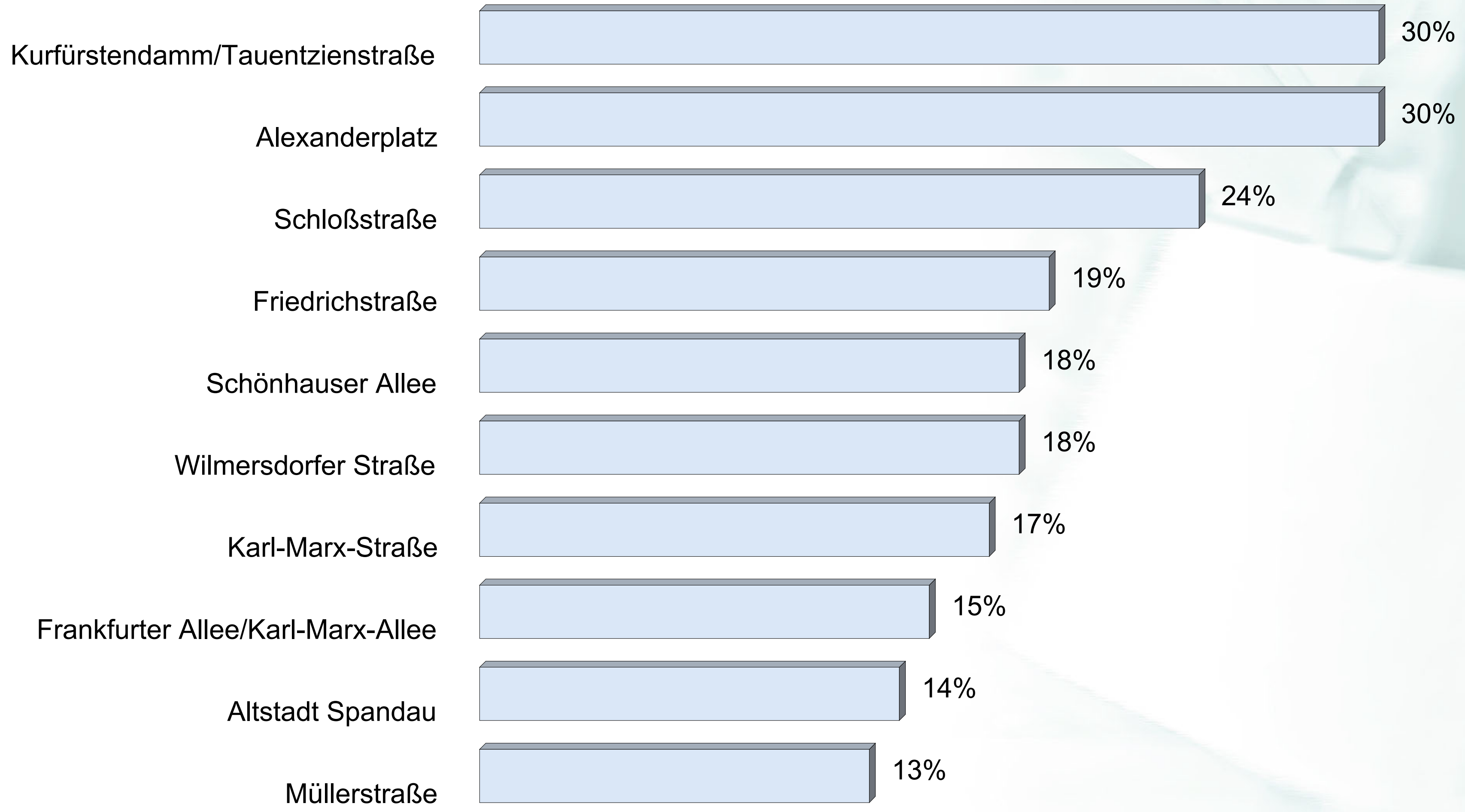
Source: 2004 Consumer Study

Regular Shopping

Shopping at least once a month



For Shopping, Berliners equally frequent the Kurfürstendamm/Tauentzienstraße in the West and the Alexanderplatz in the Eastern city.

Source: 2004 Consumer Study

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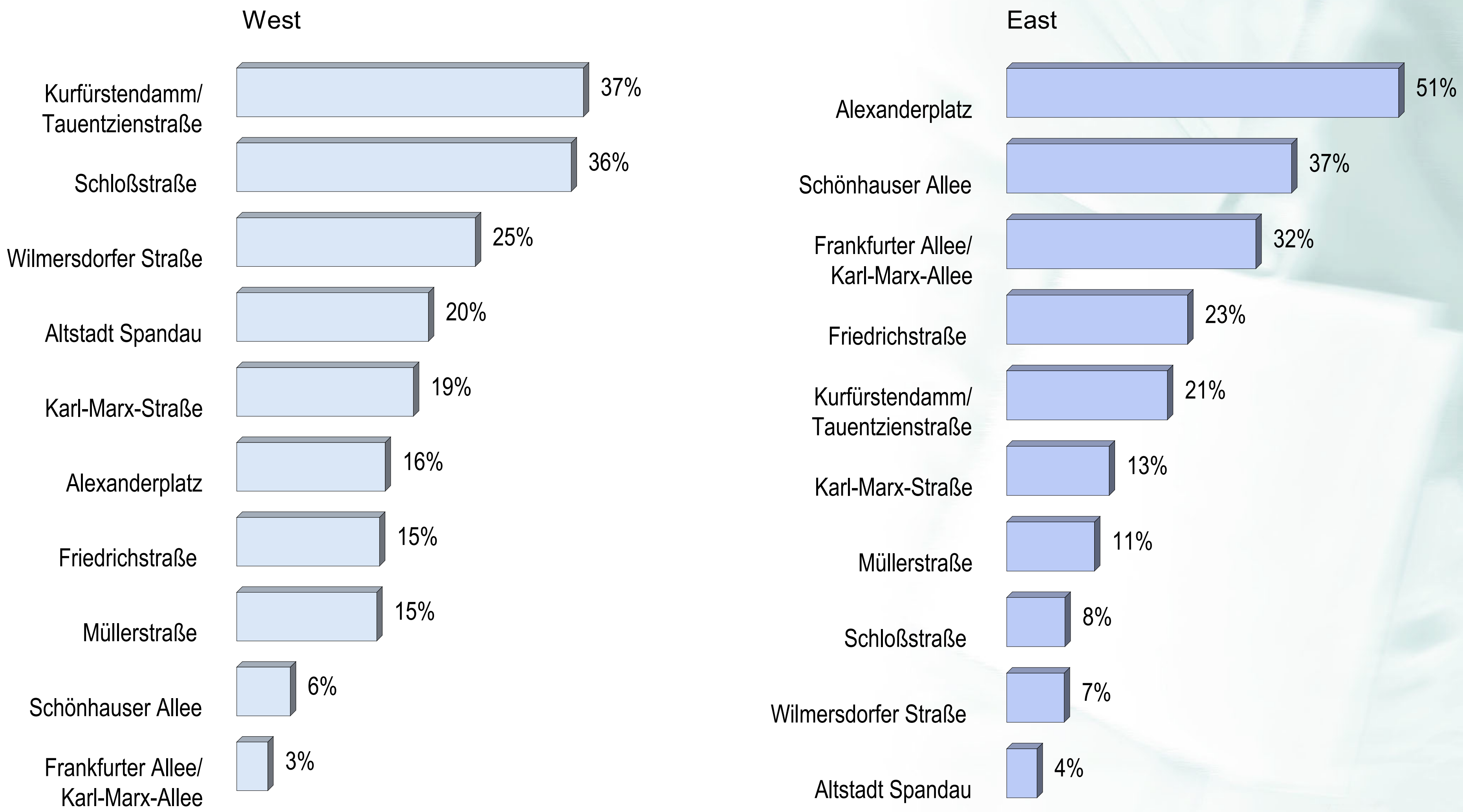
Regular Shopping

Shopping at least once a month - West/East

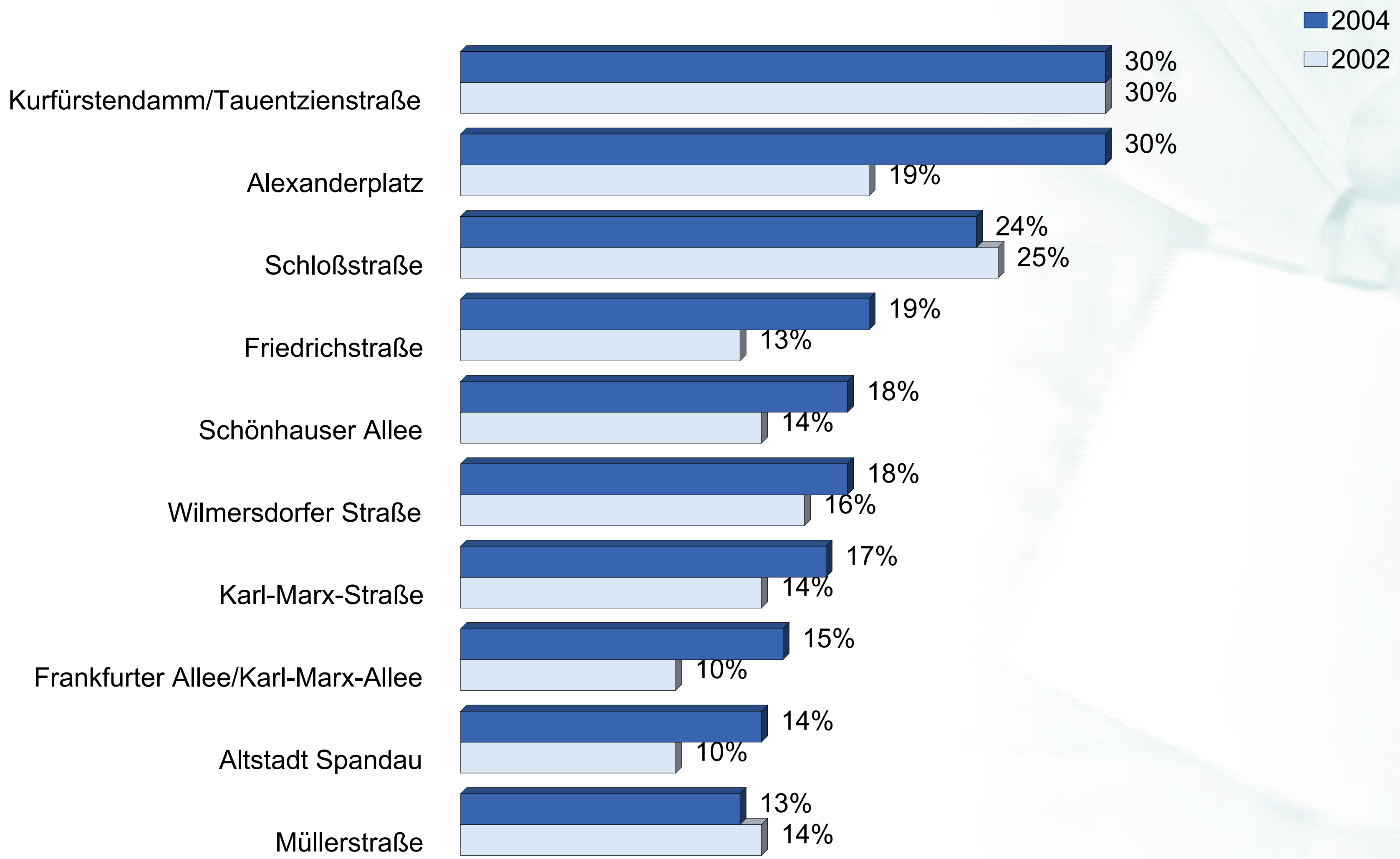


There are differences in shopping behaviour between the East and the West. While 37% of East Berliners go shopping in Schönhauser Allee, only 6% of West Berliners go there.

Source: 2004 Consumer Study

Shopping in comparison to 2002

Shopping at least once a month



Especially Alexanderplatz and Friedrichstraße have become much more popular within the last two years.

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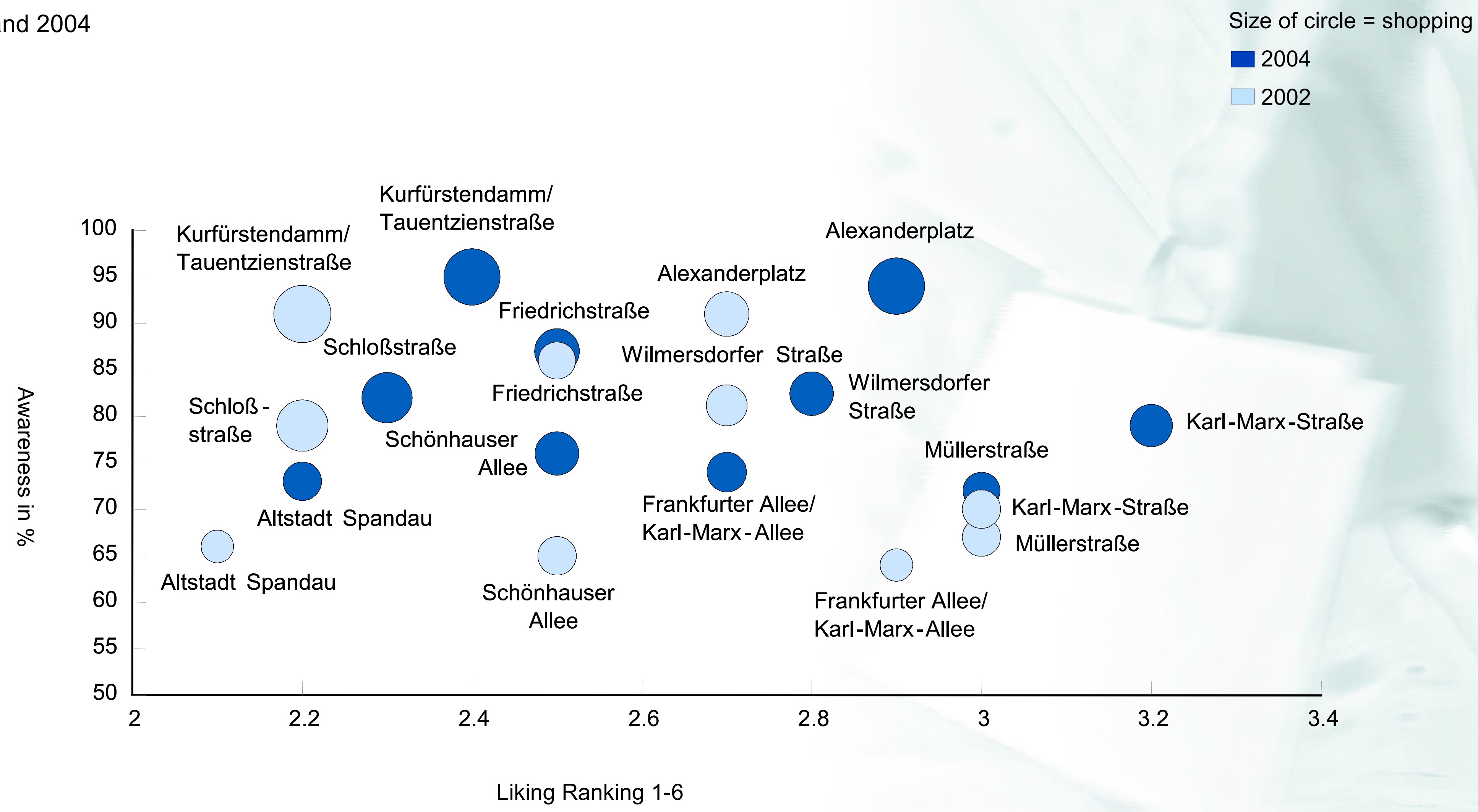
Source: 2004 Consumer Study

Awareness – liking – shopping over time

Berlin
2002 and 2004



While the old-established Shopping Centers like Kurfürstendamm oder Schlossstrasse are losing much of their attraction the Schönhauser Allee in turn is enjoying increasing popularity.

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Source: 2002/2004 Consumer Study; passive awareness, shopping at least 1x a month, average liking ranking

Shopping-Center

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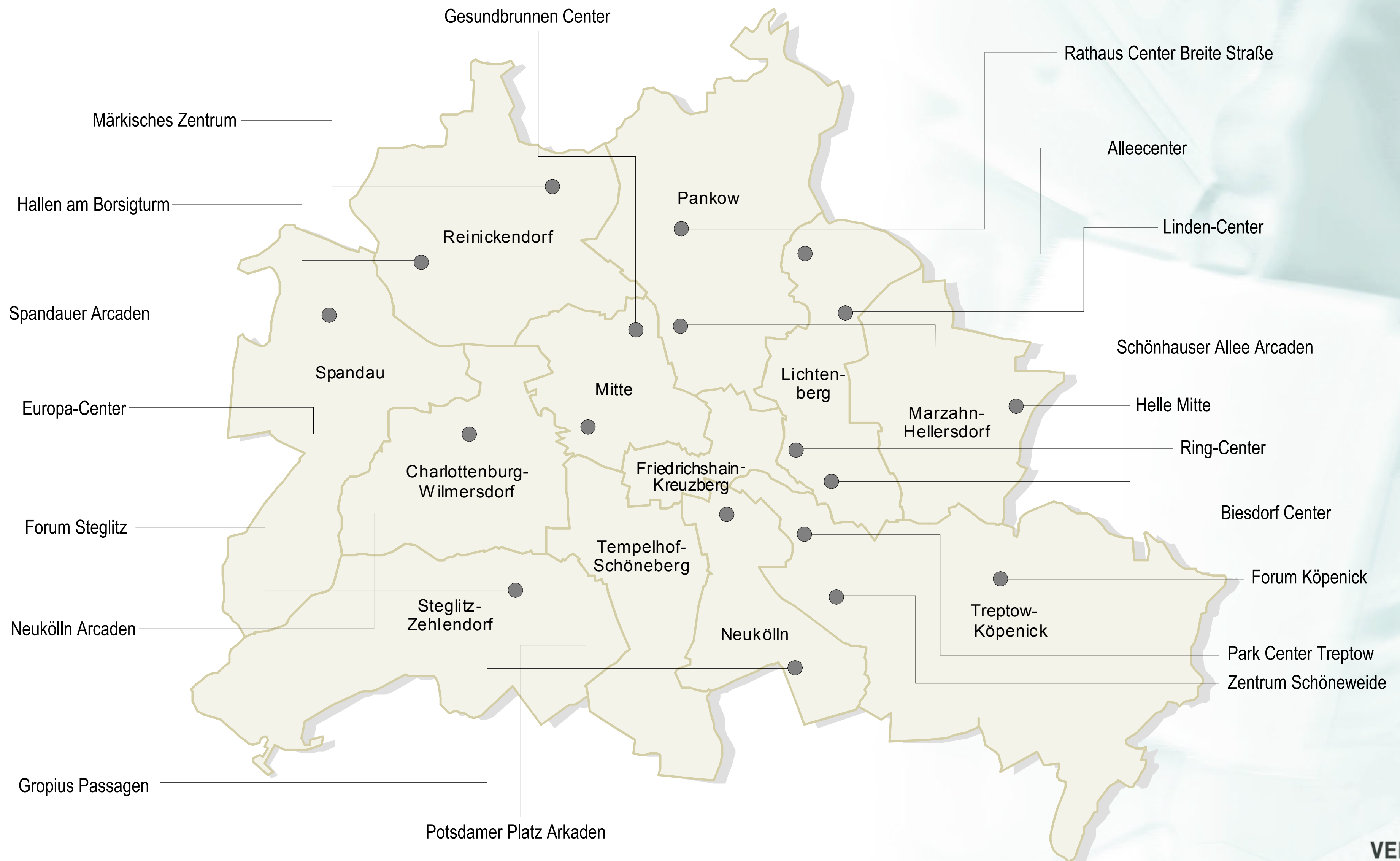
Shopping-Center



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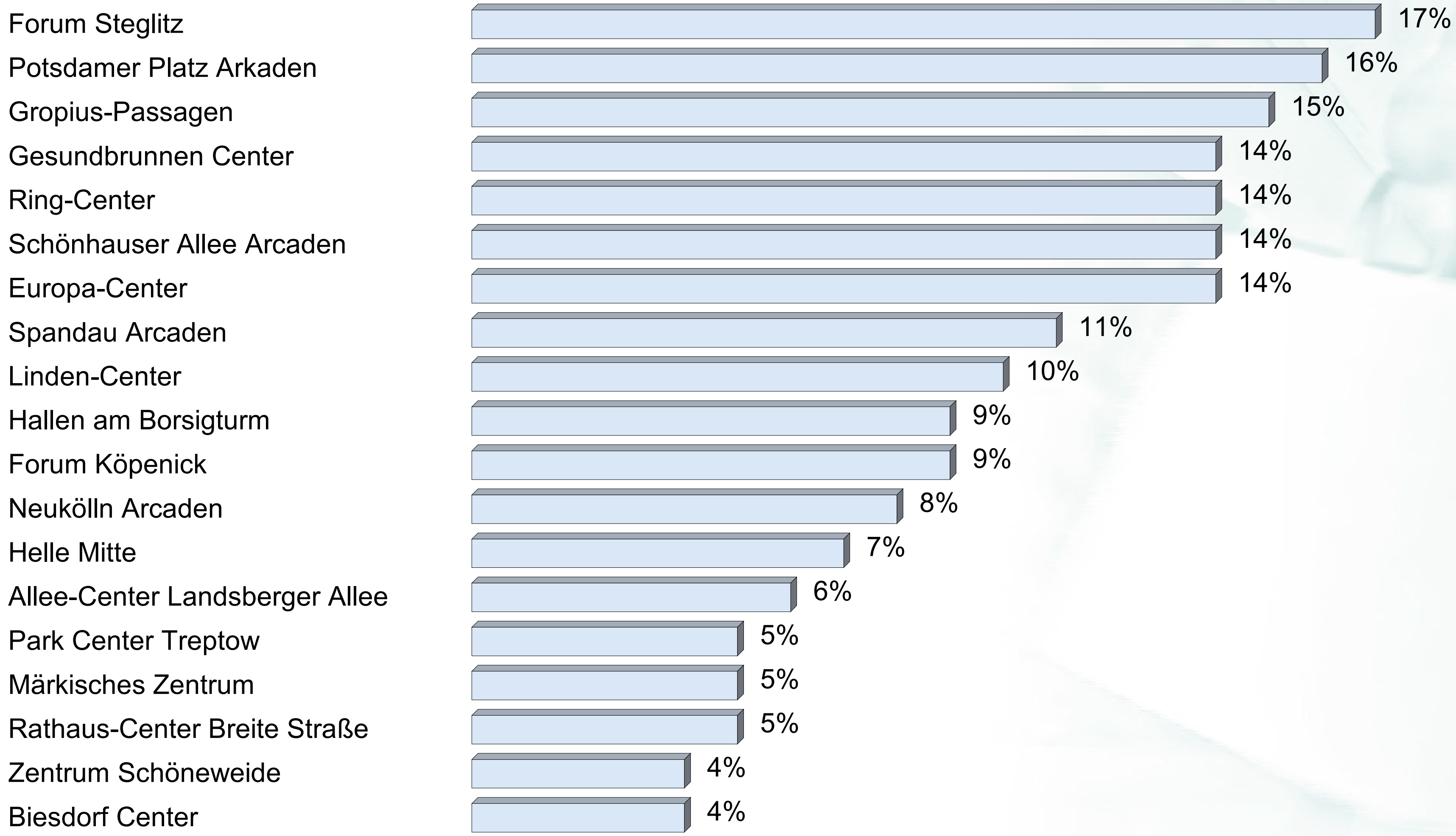
Regular Shopping

Shopping at least once a month
Berlin



Forum Steglitz and Potsdamer Platz Arkaden are the most popular shopping centers of Berlin, regularly used by nearly one in five Berlin inhabitants.

Source: 2004 Consumer Study

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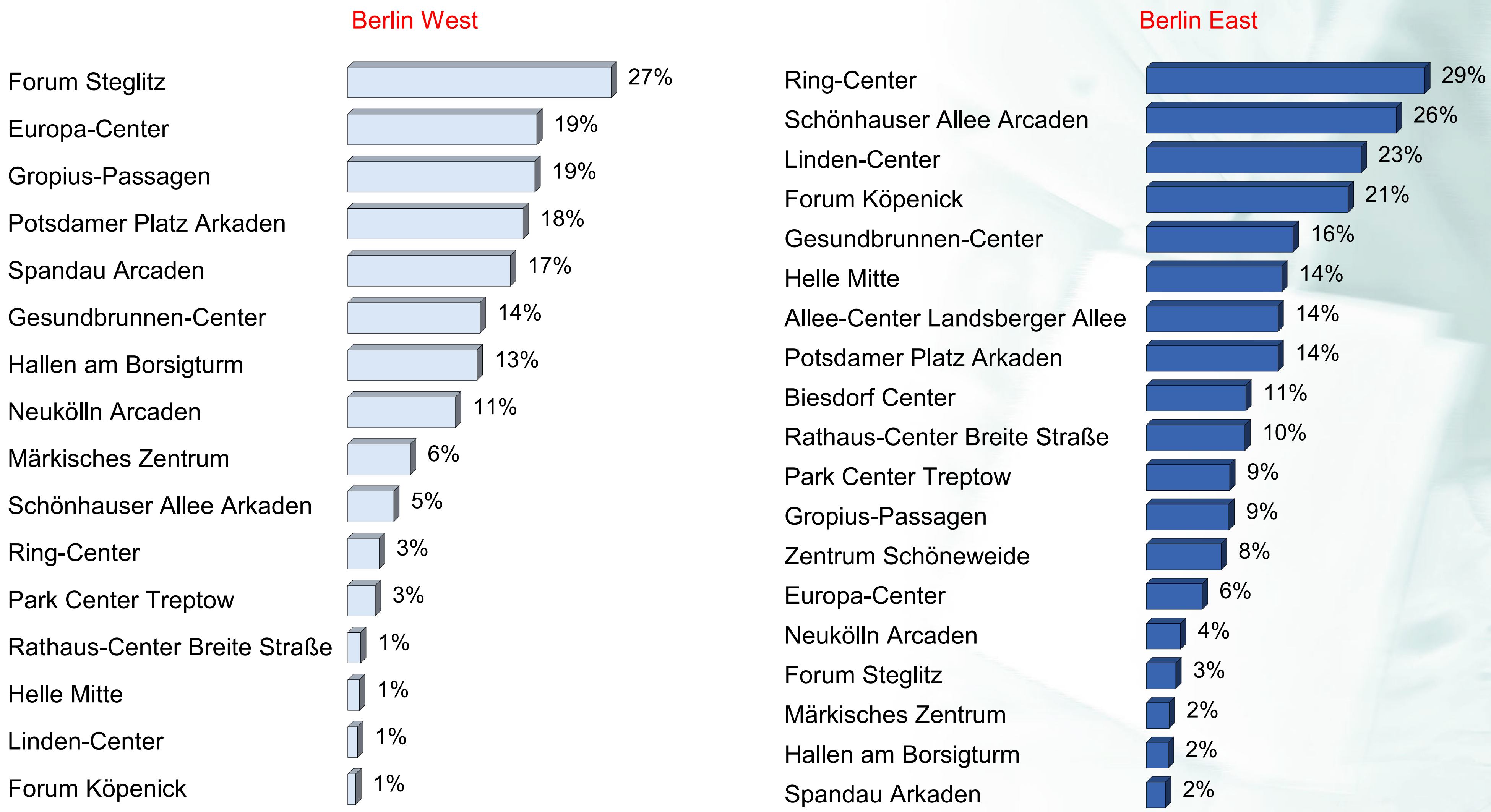
Regular Shopping

Shopping at least once a month



In the Eastern part of the City the Ring Center is most frequented. Forum Steglitz is the most popular shopping center for the West Berliners.

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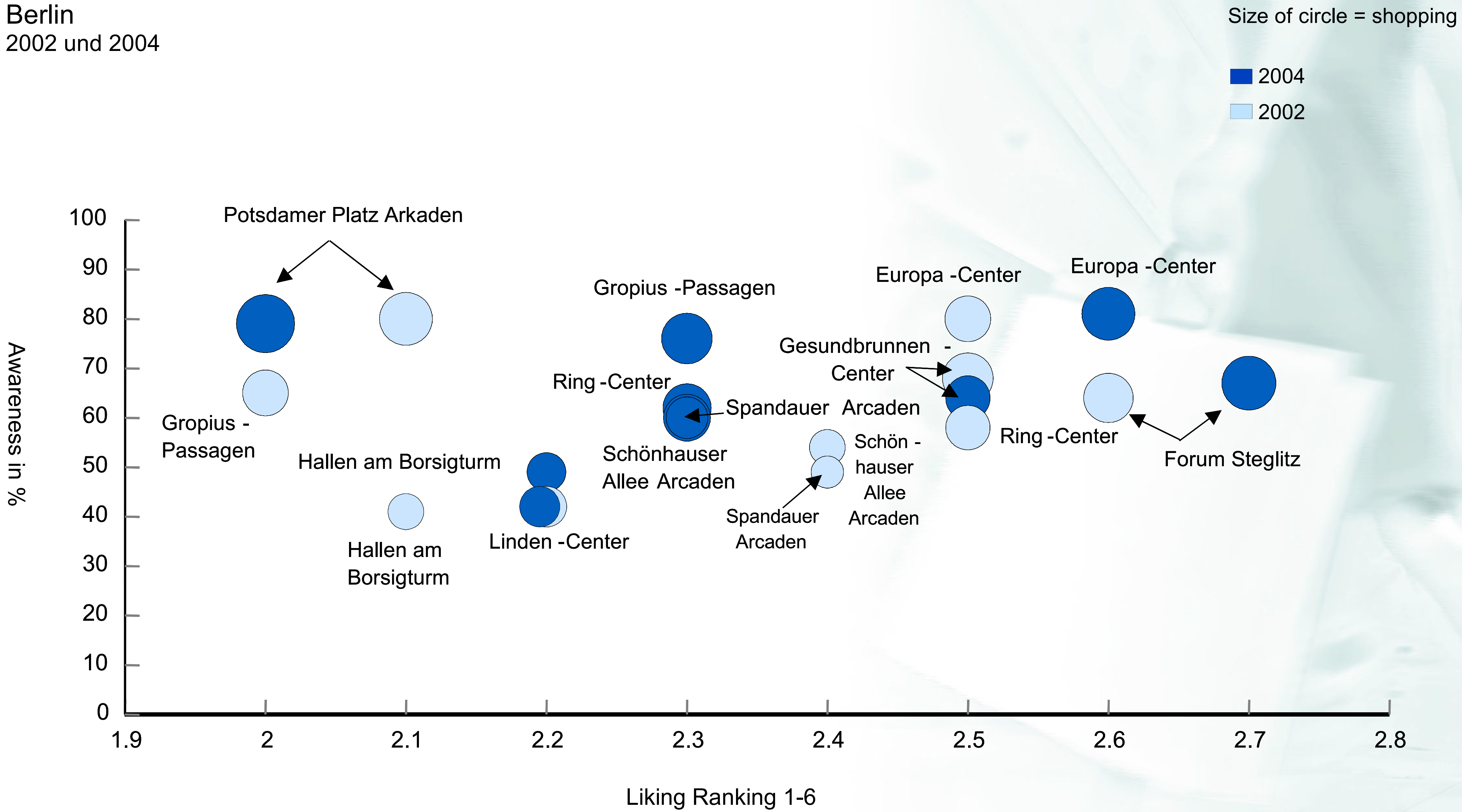
Source: 2004 Consumer Study

Awareness-Liking-Shopping

Berlin
2002 und 2004



Compared to 2002, the Potsdamer Platz Arkaden could improve their image as opposed to the Gropius-Passagen which lost in the popularity ranking.

Source: 2002/2004 Consumer Study; passive awareness, shopping within the last 6 months, average liking ranking

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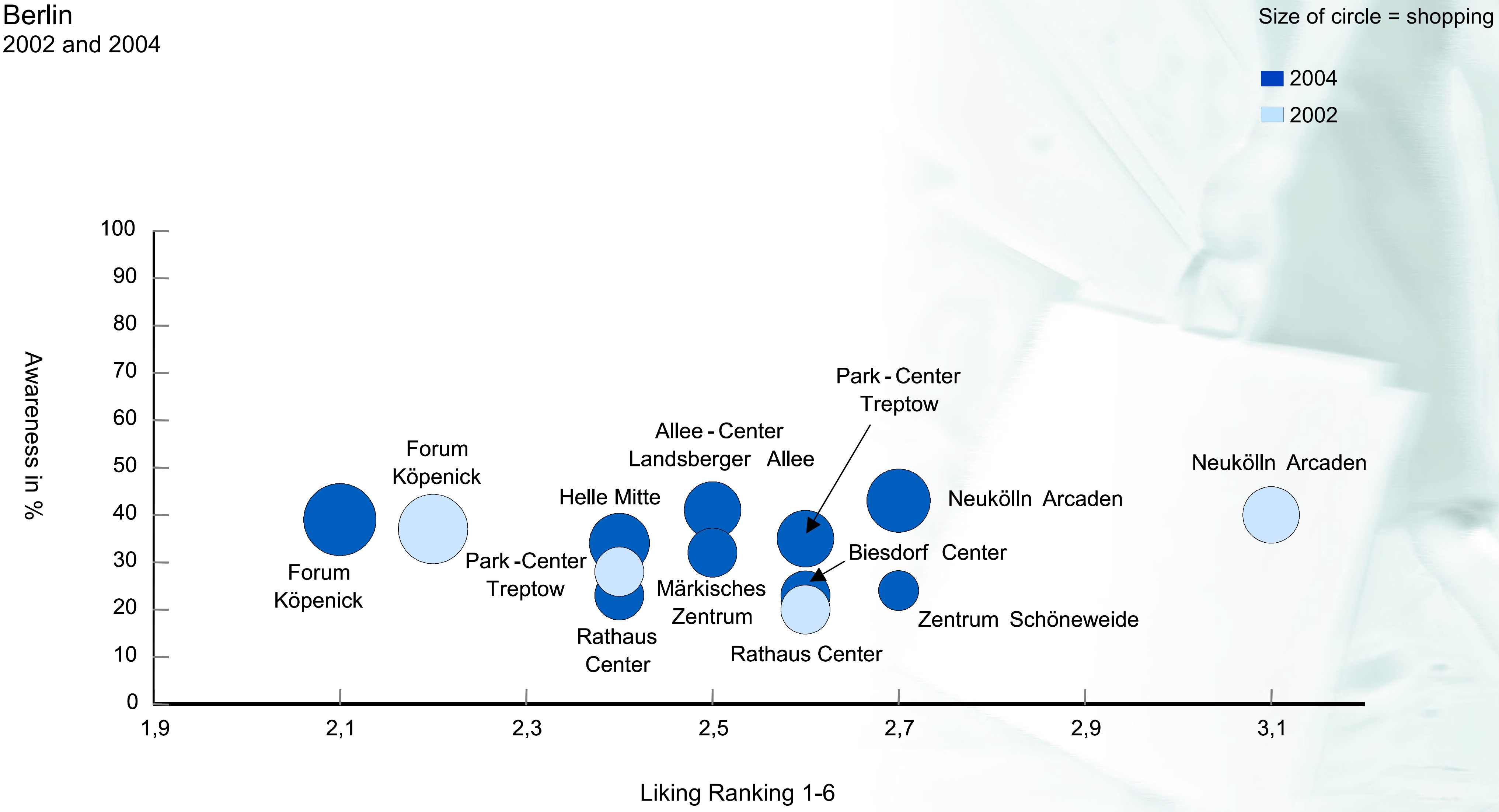
Awareness-Liking-Shopping

Berlin
2002 and 2004



The Neukölln Arcaden and the Rathaus Center could clearly improve their popularity ranking compared to 2002.

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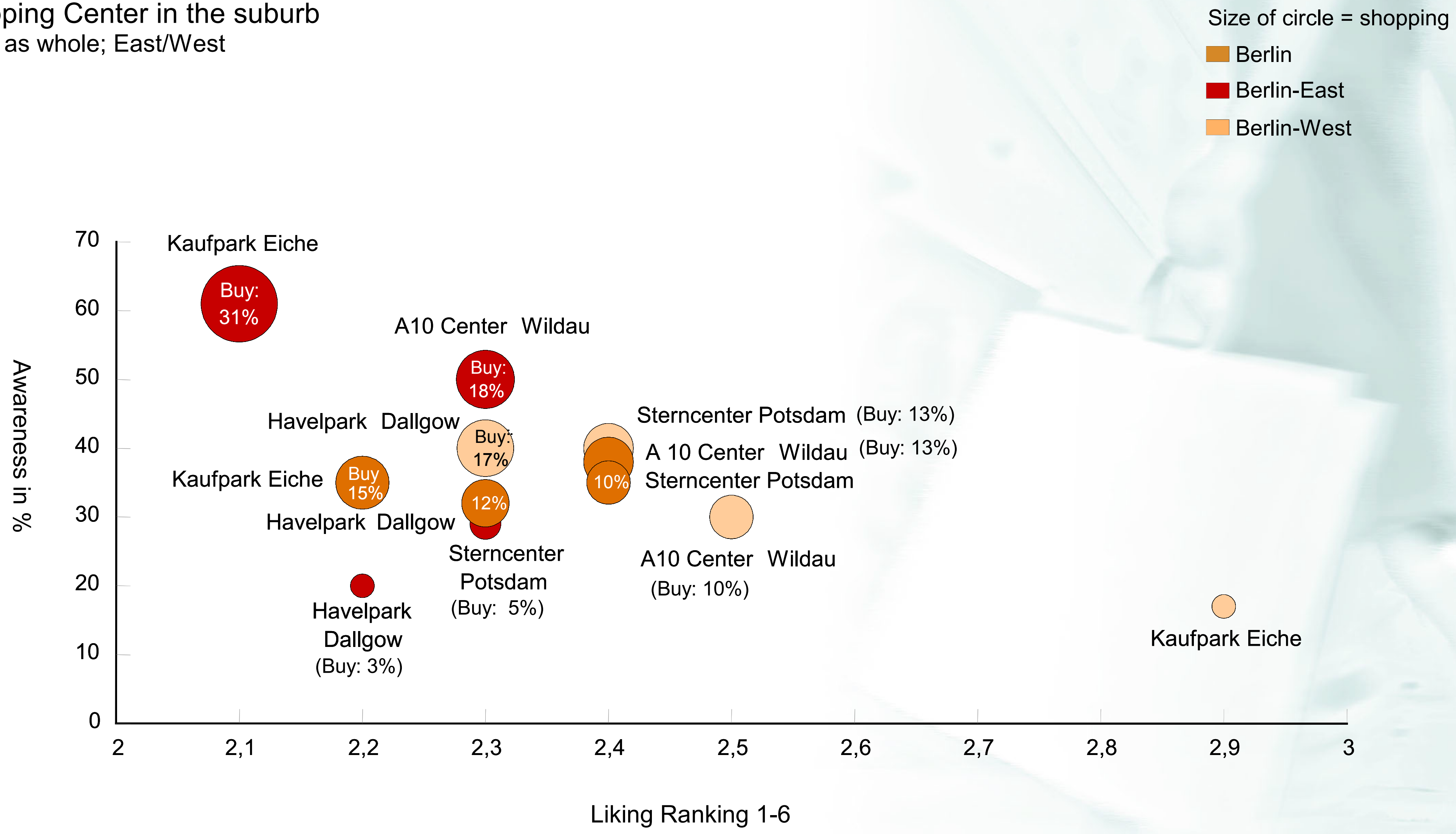
Source: 2002/2004 Consumer Study; passive awareness, shopping within the last 6 months, average liking ranking

Shopping Centers in the suburb

Awareness-Liking-Shopping

Shopping Center in the suburb
Berlin as whole; East/West



According to their location around Berlin, the centers are better known in on or the other part of the city. People from the Eastern part generally tend to rate them more favourably.

Source: 2002/2004 Consumer Study; passive awareness, shopping at least sometimes, average liking ranking

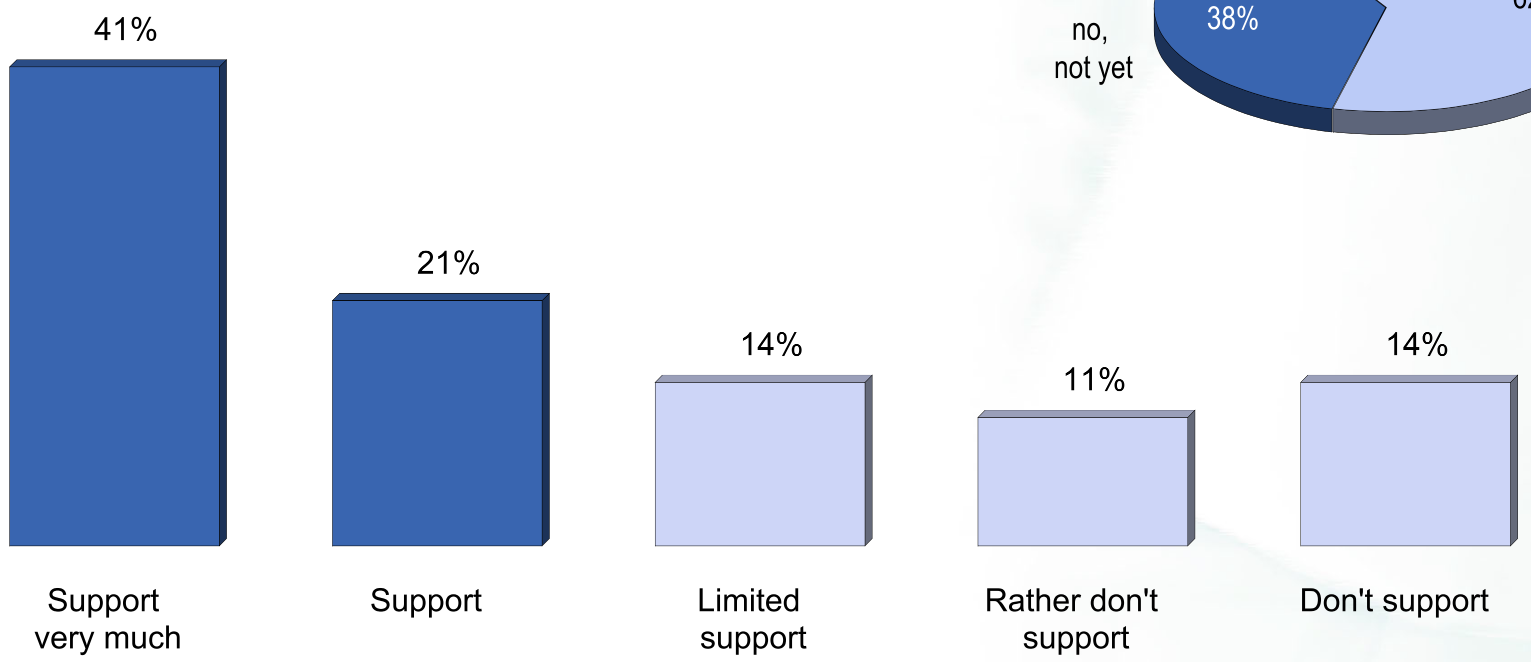
General information

Shopping longer

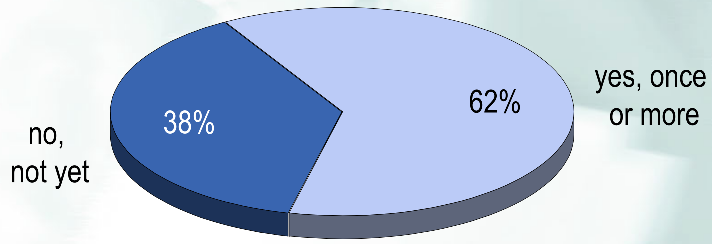
Attitudes and Using extended shop-hours

Berlin

"To what extent do you support the extended opening hours **Saturdays form 4 to 8 pm**?"



"Many shops are open until 8pm Saturdays. Have you made use of these extended opening hours yet?"



62% of Berliners appreciate the opportunity for longer shopping also on Saturdays and do so regularly. Four in ten have not yet made use of this opportunity though.

Source: 2004 Consumer Study

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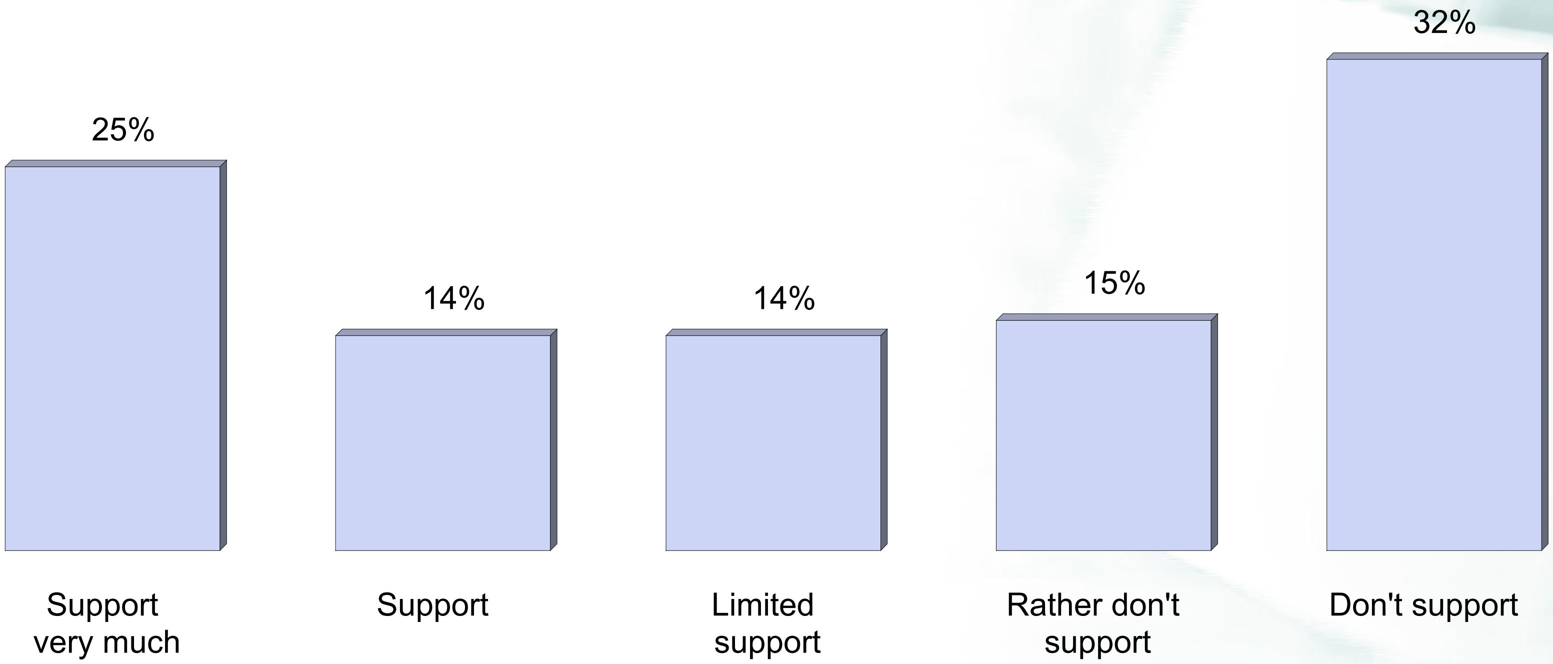
Sunday never?

Attitudes toward extended opening-hours
Berlin

“To what extent do you support **Sunday shopping?**“



Concerning Sunday shopping, attitudes vary much. While 53% of Berliners support it at least to a certain extent, 47% disapprove of it.

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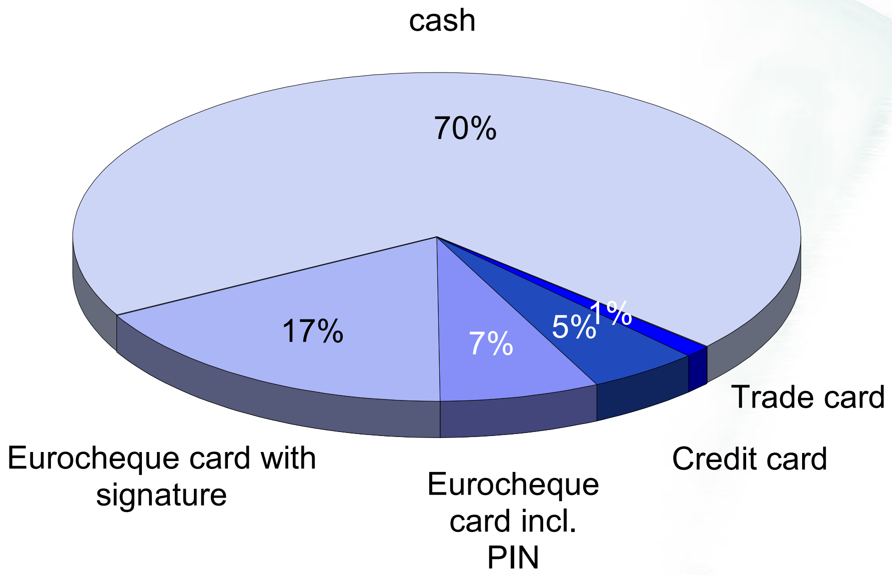
Source: 2004 Consumer Study

What way of paying consumers use



The majority still pays cash. Besides that paying by EC card is the most popular way because it is easy to handlel and easy to obtain. 5% pay by credit card.

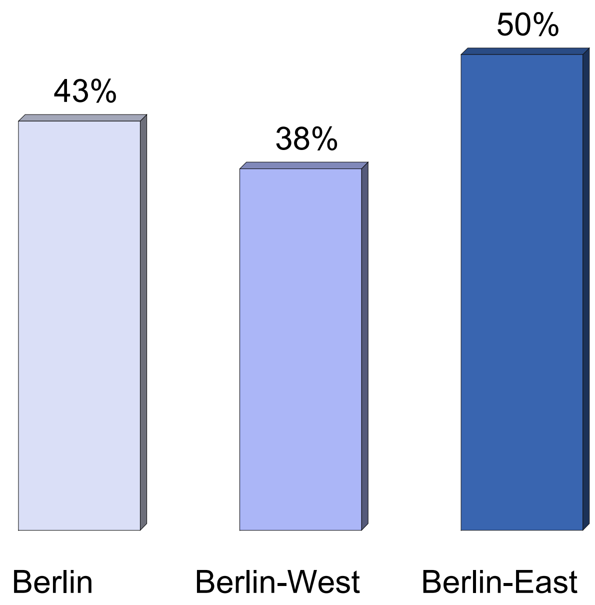
Source HDI, 2003

Cashless in Berlin

How important is the opportunity of non-cash paying in a shop for you?

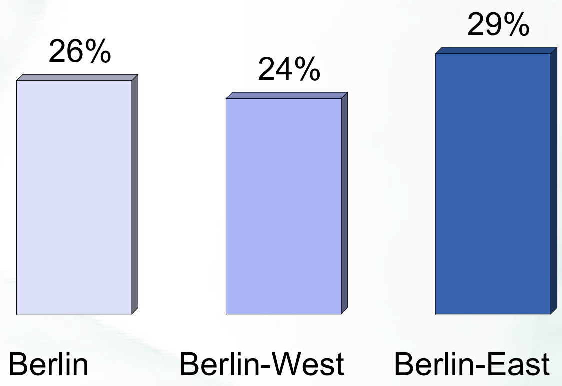
EC-card

very important/important



Credit card

very important/important



For Berliners it is very important to have the option of non-cash paying, especially for the inhabitants of the Eastern part of the city.

Source: 2004 Consumer Study

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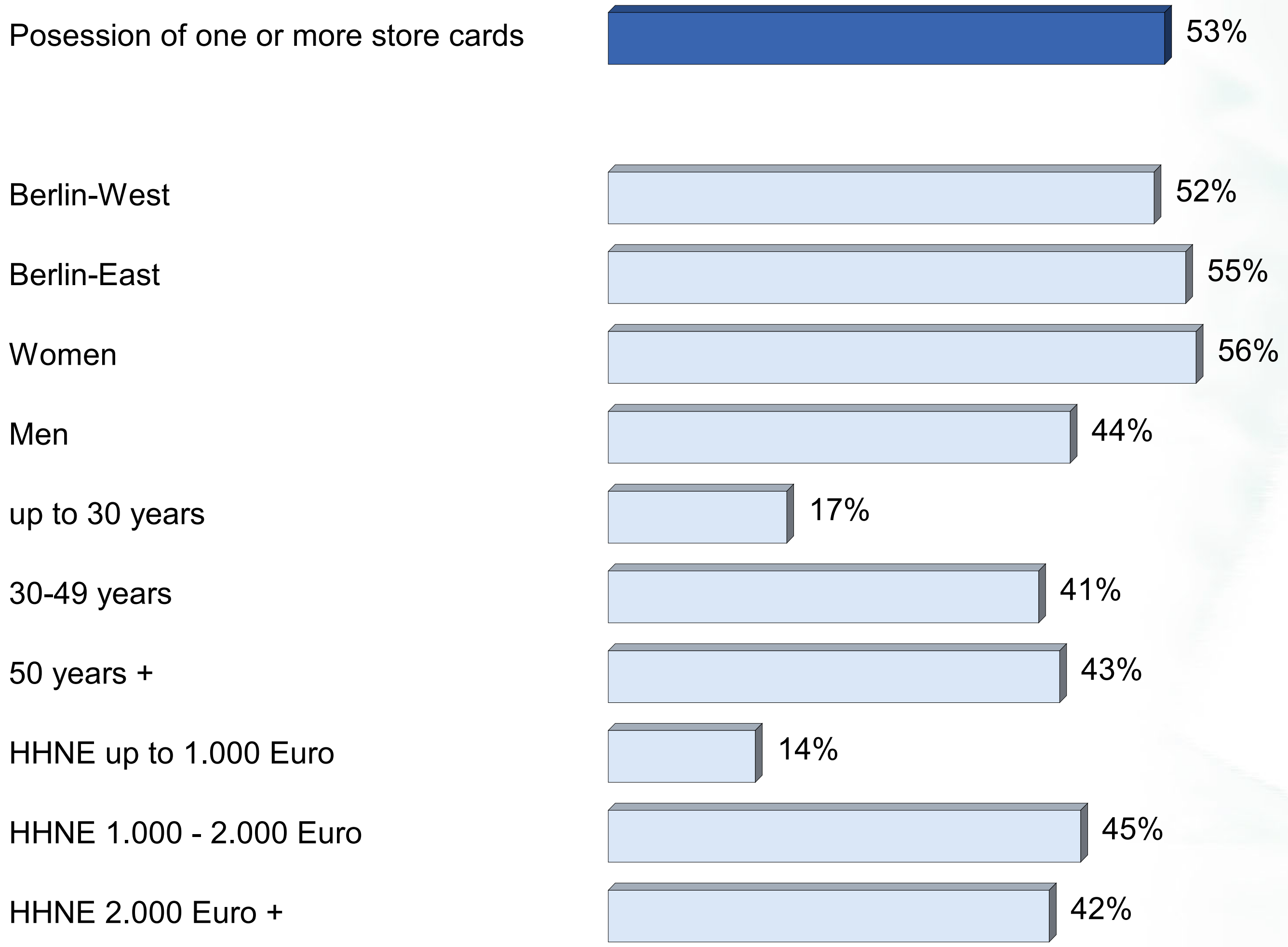
Store cards

Berlin



More than half of Berliners have at least one store card; more East Berliners hold store cards and they are more popular with women.

Source: 2004 Consumer Study; HHNE: household netincome

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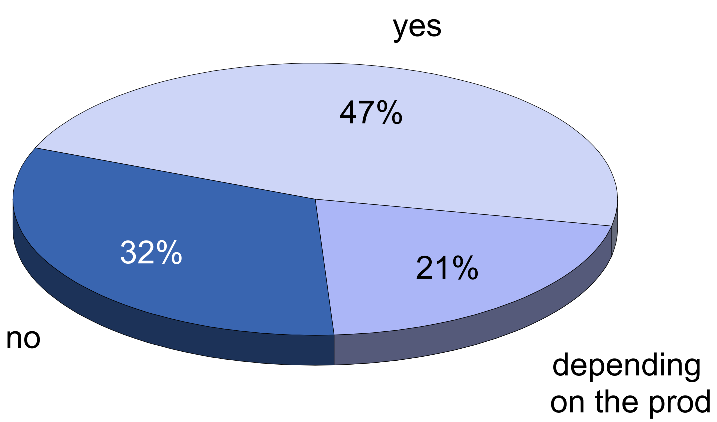
Discounts as incentive to buy?

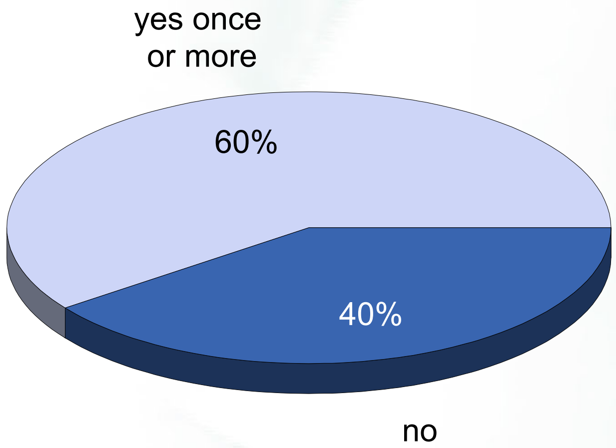
Berlin

“Since the discount law has been dropped and there are no more summer and winter sales the shops offer more discounts on products.

Do you pay special attention on discounts?



“Have you been purchasing products because they were on sale which you would not otherwise have bought before?“



About every second Berliner pays special attention to discounts. 40% do not buy spontaneously products they did not nuy if they were not on sale although .

Source: 2004 Consumer Study

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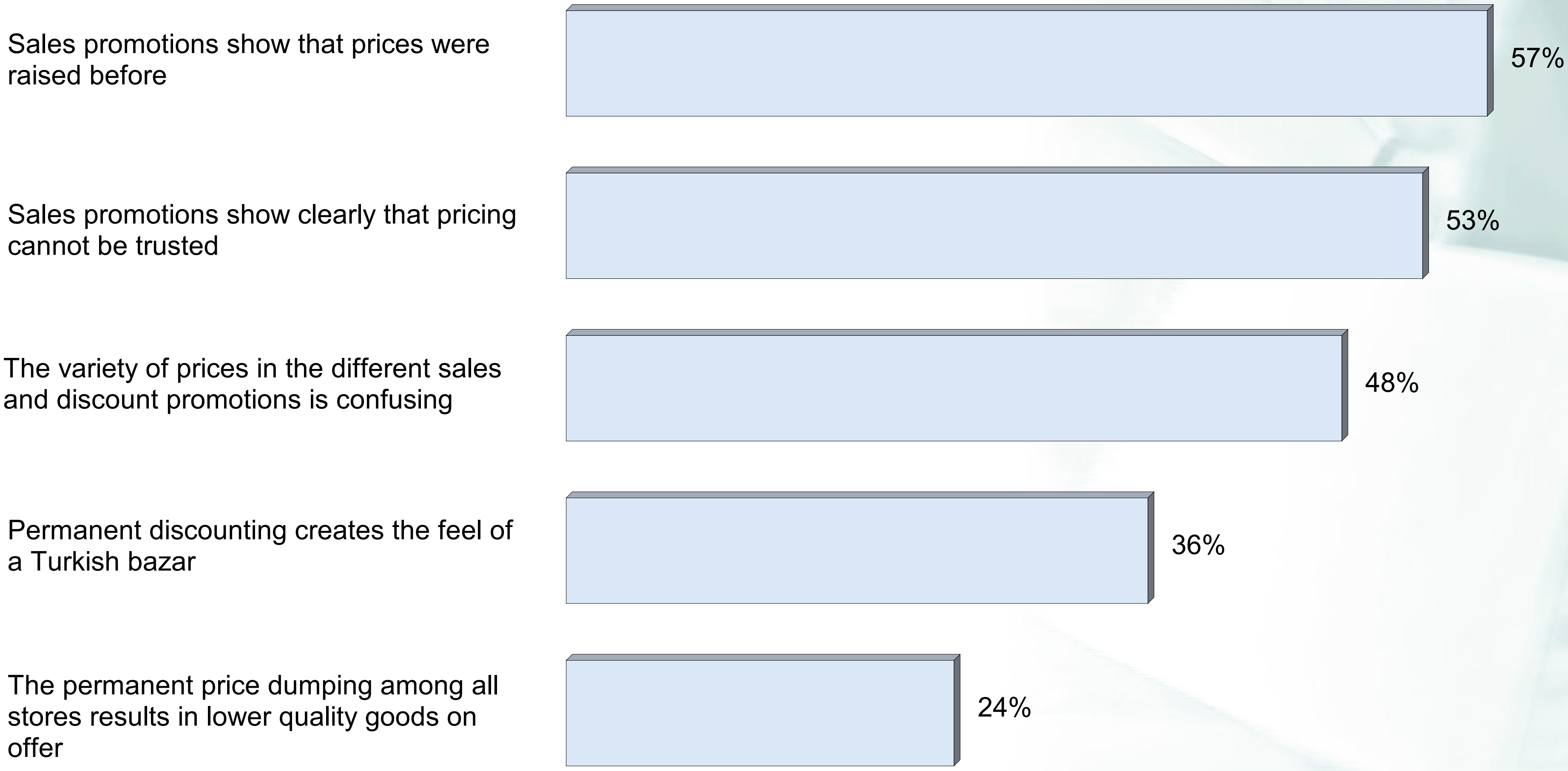
Discounts and more

Statement: "I agree”
Berlin



The Ranking of negative perceptions on the topic “discounts" is headed by the concern of goods having been overprices before. Only 25% of consumers is worried about low grade quality goods.

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Source: 2004 Consumer Study

Facts and figures of the study

Commissioned by:	Berliner Verlag GmbH & Co. KG
Conception:	Czaia Marktforschung , Bremen
Parent population:	German -speaking population in Berlin aged 14 and over
Sample:	Taking of an unclustered special - purpose sample of the Arbeitskreis Deutscher Markt- und Sozialforschungsinstitute (ADM) basis system for C.A.T.I. studies. Disproportionately distributed for West and East Berlin, proportionate gross sample per city district

Berlin as a whole:	4,054 cases
Berlin West:	2,095 cases
Berlin East:	1,959 cases

Weighting:	Setting aside of the disproportionate overall sample and alignment of data regarding demographic factors to external reference criteria of the Berlin Statistics Office
Method:	C.A.T.I. (Computer Assisted Telephone Interviews)
Data collection:	17/03 – 20/05/2004

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