
Facing Consumer Challenge

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TNS , Millward Brown





DIFFERENT NEEDS AND VALUES - IMPLICATIONS FOR BRANDS AND MARKETING





MAMMAS & PAPPAS MOTHERS & KIDS MILLENNIALS





MILLENIALS (GENERATION Y)

Millennials by the numbers

1.8
billion globally

22%
In CEE

\$1.3T
projected 2015
spending in the US
attributed to them



A generation of
influencers

75%

consider themselves
purchase-influencers
of peers & other
generations



Brands must deliver
more than a product,
they must offer a **TOTAL
EXPERIENCE**



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In Advertising They HATE

- Artificial tone of voice
- Pushy
- Long and boring
- KIDS!!!



A close-up photograph of a woman with dark hair smiling warmly and kissing a young child with curly brown hair on the cheek. The child is wearing a grey shirt. The background is slightly blurred, showing a desk with some items.

MOTHERS AND KIDS

with kids below 15 (GENERATION Z)



Mothers are **supermothers**

- they cover most of the service jobs in the household and care for kids.

	Cooking	Household cleaning	Collecting children from school	Transporting children to clubs	Minor repairs in house/flat	Minor household administration (bills, post etc.)	Choosing holiday	Decisions about purchases above 3.000 CZK	Washing
Father	18%	18%	28%	30%	82%	28%	57%	62%	4%
Mother	95%	98%	74%	72%	30%	86%	85%	85%	99%
Grandparents	4%	1%	10%	5%	4%	1%	1%	1%	1%
Child / Children	3%	15%	11%	9%	1%	0%	12%	1%	2%
Paid help	0%	0%	0%	0%	0%	0%	0%	0%	0%
Someone else, who	1%	1%	11%	10%	2%	1%	5%	5%	0%

MULTIGENERATION FAMILIES ARE LESS FREQUENT.

only

9% families live with
grandmother

5% families live with
grandfather



PRESENCE OF MEN IS IMPORTANT AND QUITE OFTEN MISSING

The men's authority at children is great. For example when an electrician comes to the nursery, suddenly the lady teacher is by the wayside.

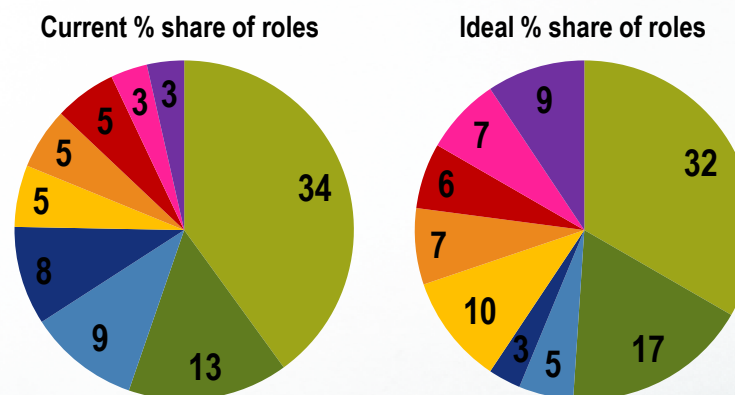


Women fulfill the former roles of their mothers but want to succeed also in other areas.

Positive feelings connected with motherhood are the source of energy for them.

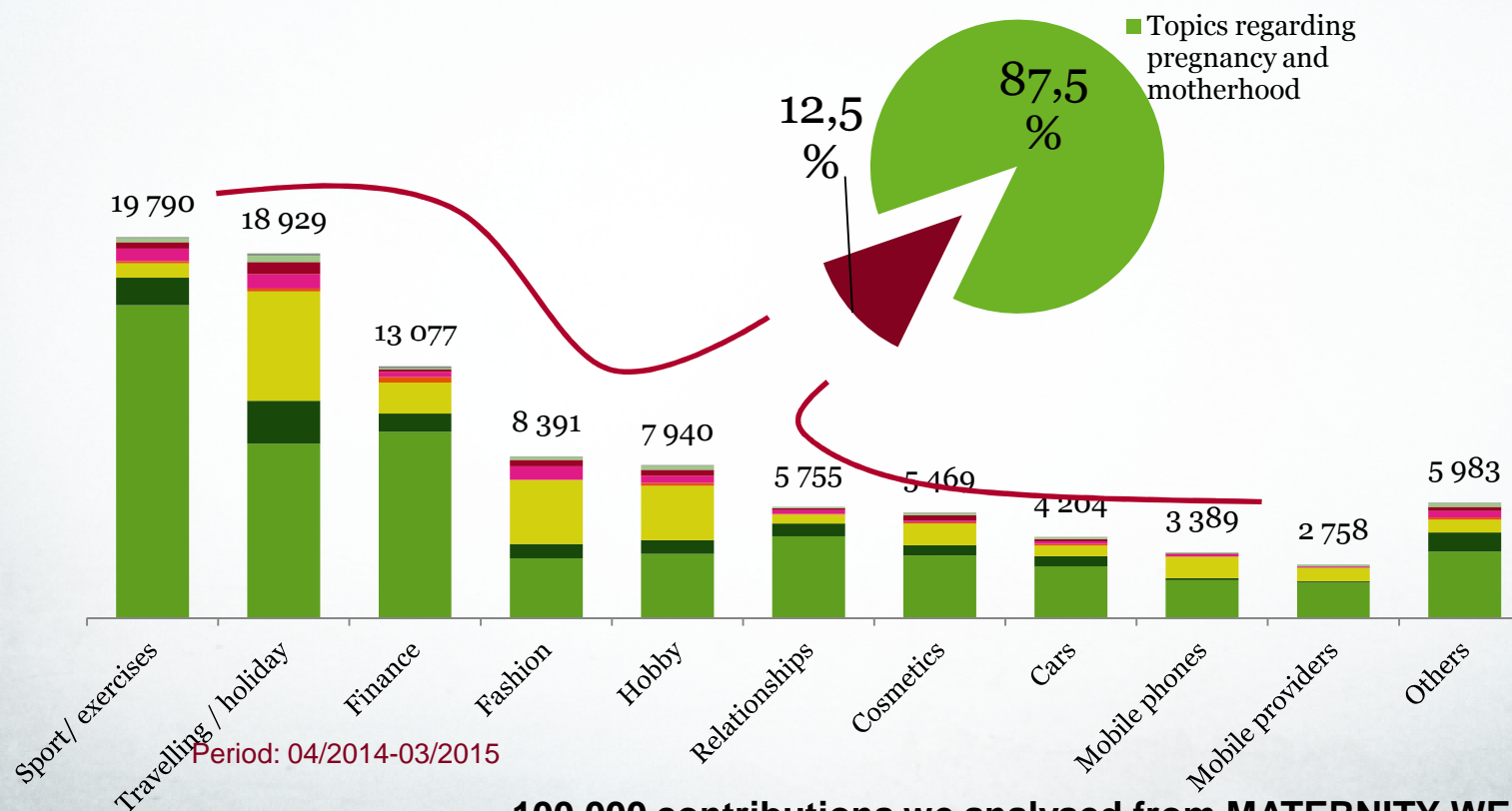


MOTHERS LACK TIME FOR THEMSELVES, FOR WORK REALIZATION (CAREER) AND PARTNER.



Báze: Matky - celkový vzorek (1511)

FOR THE MOTHERS THE INTERNET IS INDISPENSABLE (70% WILL MISS IT)

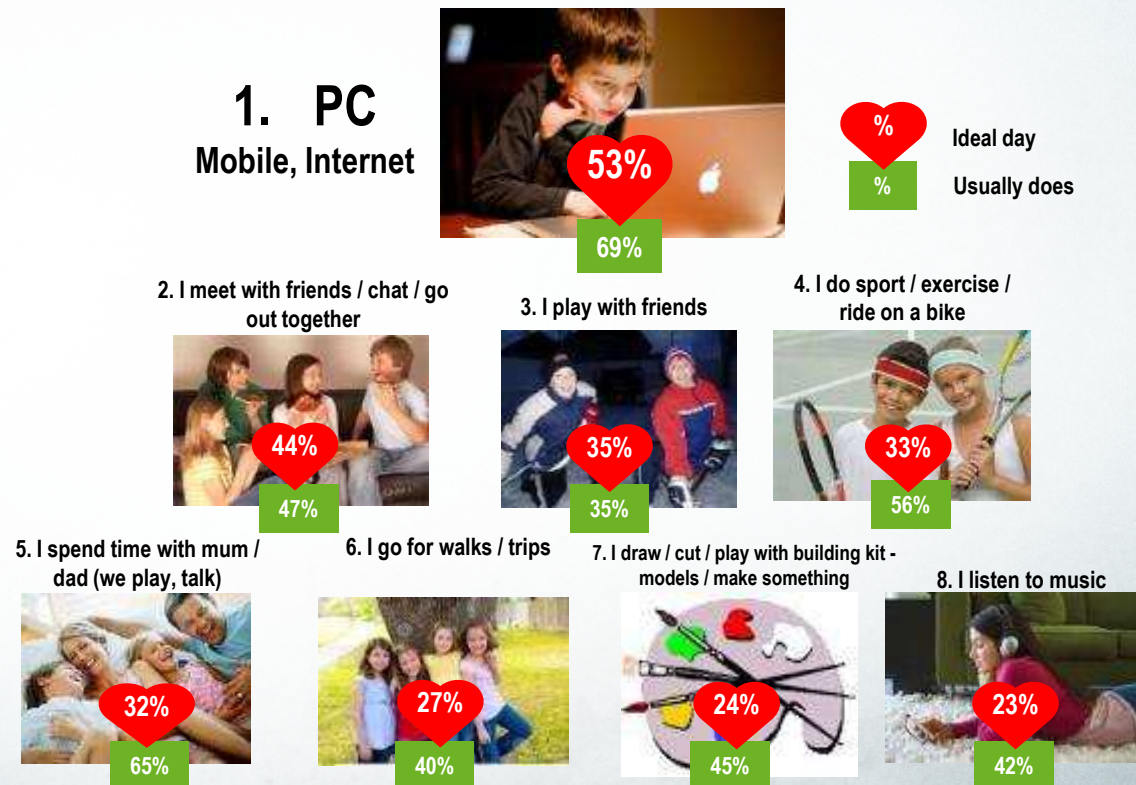


100.000 contributions we analysed from MATERNITY WEBSITES

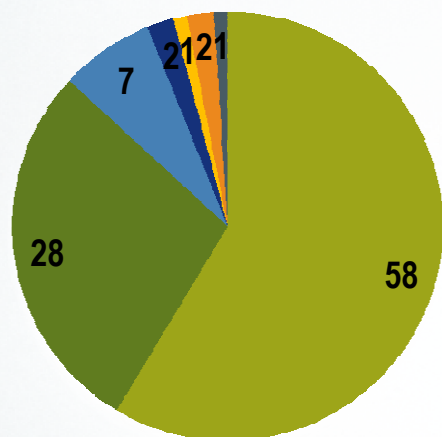
Technologies influenced the spare time of kids and mothers.

Social networking and playing games on the computer are the most popular activities.

THE IDEAL DAY IN KIDS' VIEW

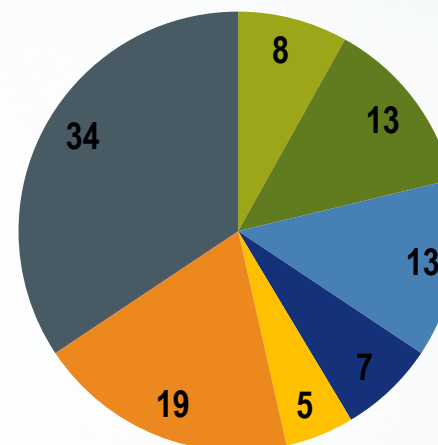


PLAYING WITH „TOYS“ IS ONLY FOR SMALL KIDS



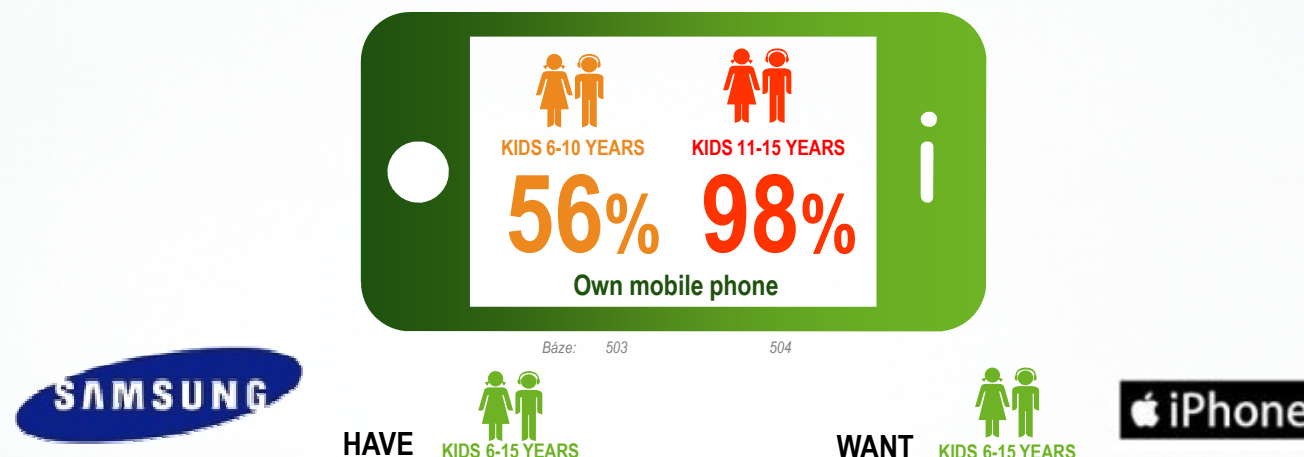
KIDS 6-10 YEARS

- Every day
- Several times a week
- Around 1x a week
- Several times a month
- Around 1x a month
- Less often
- Never



KIDS 11-15 YEARS

ALMOST ALL OLDER KIDS HAVE MOBILE PHONES.



Kids Have Quite Wide Range Of Technical Equipment For Their Own Disposal

THE KIDS' RELATIONSHIP TO TECHNOLOGIES STARTS TO BE DANGEROUSLY CLOSE.

Kids receive **pocket money** since their eight years.

Besides pocket money the parents get the kids also **OTHER FINANCIAL PRODUCTS**, most often casualty insurance or a building society account

The opportunity is also common shopping with parents (**I WANT**)



THEY OFTEN HAVE NO PREFERENCE OR THEY COPY THE MAINSTREAM CHARTS BUT CZ MARKET HAVE SOME SPECIALTIES



OZZÁK



SIMPSONOVI



MICHAL NESVADBA



LUCKA VONDRÁČKOVÁ



EWA FARNA



LUKÁŠ PAVLÁSEK



JAKUB PRACHAŘ



VIRALBROTHERS



GOGO MAN TV

"THE MOST AWKWARD" ARE ON CONTRARY DEFINITELY POLITICIANS, LEAD BY THE HEAD OF THE STATE



37%

MILOŠ ZEMAN



22%

**KAREL
SCHWARZENBERG**



15%

**BOHUSLAV
SOBOTKA**



10%

**DÁDA
PATRASOVÁ**

Báze: 1007

KIDS USUALLY APPRECIATE HUMOR IN ADS



KIDS 6-15
YEARS

T-Mobile „Kruhy“ (and the whole campaing Naše třída)



T-Mobile
(oplder campaign with Pavlásek and Kotek)



LEGO
Various product ads



PAULA
„Paula to je hvězda....“



VODAFONE
Ratměřice



MATYLDA



KOFOLA
Pig



AIR BANK
All campaign



VITANA
„Redukujó do vaničky“



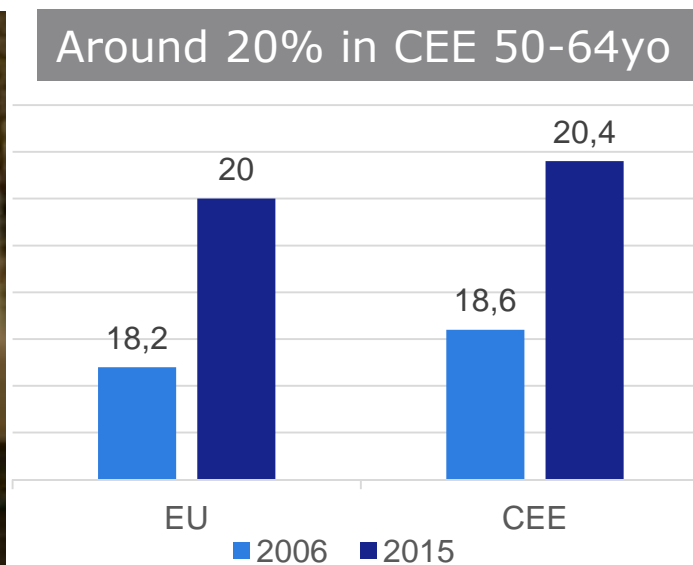


**MAMMAS
&PAPPAS**

**(BABY BOOMERS)
(1945-1960)**

Mamas&Papas (55-70 yo)

In time they share is slightly increasing – the forecast is close to 1/3 of total population in 50 years

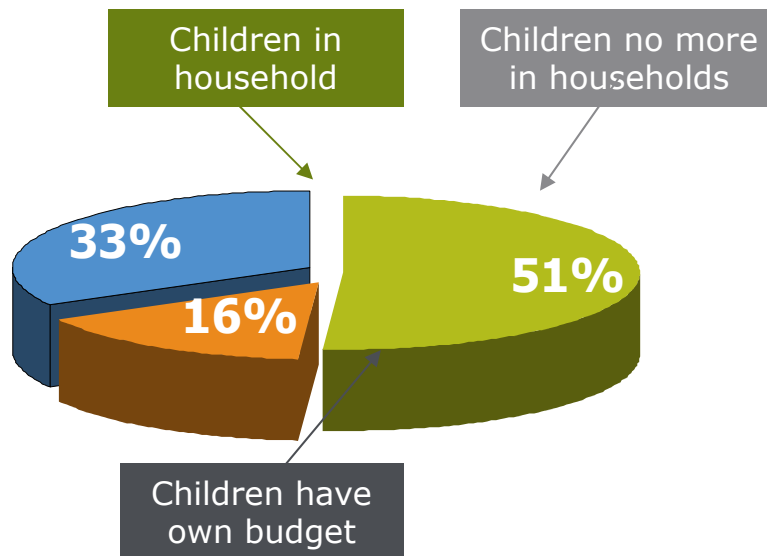


Their households have the **highest per capita income**
37% from total incomes

In CZ it makes overall unbelievable
10+ billions EUR per year
as disposable income

GOLDEN PLANET: „MAMAS & PAPAS“

Empty Nests bring them Time (sometimes too much) but also NEW NEEDS, NEW HOBBIES, MORE MONEY



„EMPTY NESTS“
*Mostly they live only
with a partner
Children either moved out or
have their own budget*

Source: Millward Brown

GENERATION?!

*SPONTANEOUSLY THEY DON'T REGARD THEMSELVES AS A SPECIAL SOCIAL GROUP
IT HAPPENS WITH RETIREMENT*

Important part they lived **in socialism**, many political changes BUT now they've **been adapting** although it partly still restricts them in everyday life:

know less languages, not self-assertive

They see themselves in individual roles - parents, grandparents, working...

Health and good relationship in family are their most important values (*also families of their children*)



GENERATION

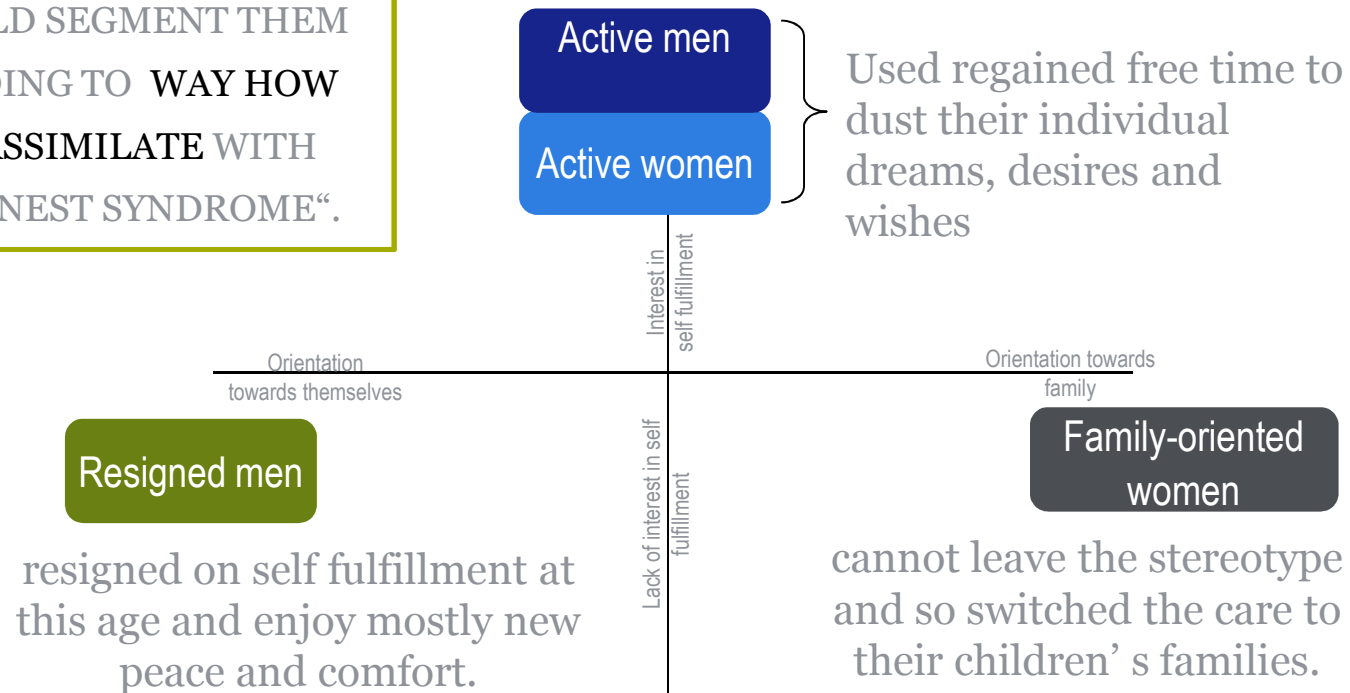


*They feel quite satisfied,
not old, although the best age
was 30-40 years
BUT
Surrounding often see them
as old,
underestimates them -
mainly **EMPLOYERS***

TYPOLGY

IT IS HARD TO IDENTIFY „TRIBES“.

WE COULD SEGMENT THEM
ACCORDING TO WAY HOW
THEY ASSIMILATE WITH
„EMPTY NEST SYNDROME“.



CONSUMPTION

Mostly they are financially well off.

**They can afford to spend more, than
when they had children living with
them.**

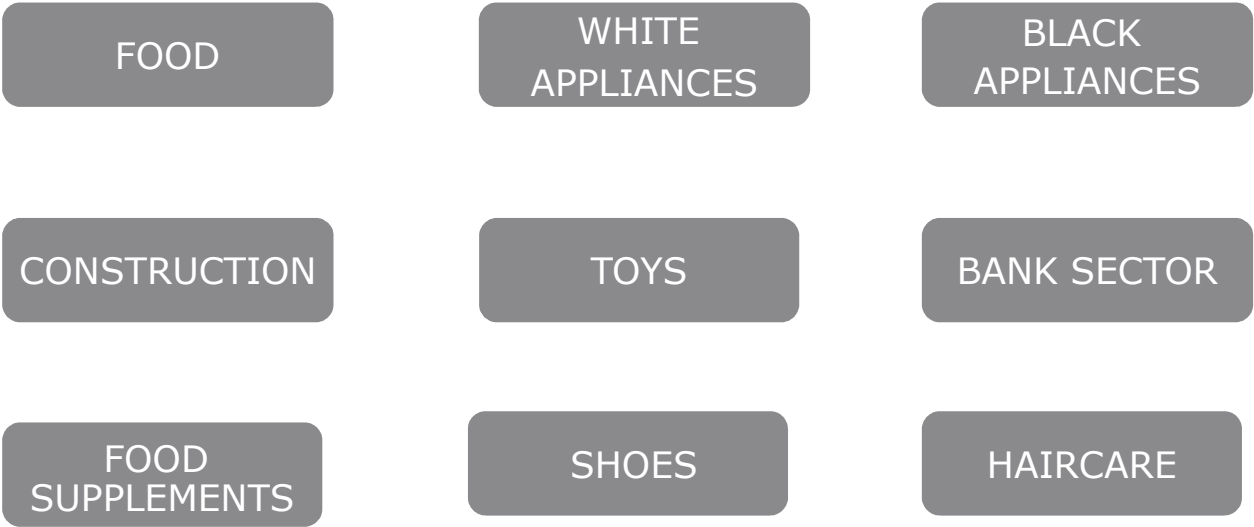
**They don't miss anything particular
on the market, the offer is enormous
compared to socialistic shops.**

**BUT there could be found a couple of
unsatisfied needs, that rely to their
life situation of „empty nest“**



CONSUMPTION

IMPORTANT CATEGORIES WHERE THEY SPEND



ADVERTISING – DO!

Respect them as EXPERTS, GIVE ADVICE OR GRANDPARENTS (Lowling, Wise)

Humor (not too tough)

They can also handle a bit of exaggeration

on them

Life situation of „empty nest“

Real people

Nature

Czech VALUES, traditions



ADVERTISING – DO NOT!

*It is **IMPORTANT TO SHOW RESPECT, Not TOO INTIMATE***

Exaggeration

Unrealistically looking people

Too dynamic cutting

They are agitated by showing intimate details from life (**incontinency pads, medicaments supporting virility etc.)** in connection with their age category.



Different but also
same!
But the imperative
is to recognize
these groups,
respect them

- The split among main trends is similar !!!!
- They still tend to believe in brands – but they are important in different categories and represent different values!
- They want to look good and being active – despite what they might say – and they want to spend their time in community.
- Sensitive to style of communication – it should be honest, straightforward and respecting their values.
- Care of the proper communication channel.



ANY
QUESTIONS?

