KANTAR TNS
INDEX KOSOVA SH.P.K.

ANALYTICAL REPORT

Market Research on Domestic Product Perceptions in Kosovo

March 2018

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EXECUTIVE SUMMARY

Domestic products are being widely used in Kosovo according to the research participants, although this highly depends on their household income, and other factors like age and type of residence (urban/rural), but also behavioral patterns and attitudes towards domestic products.

Households with higher incomes tend to use international brands more, whereas households from middle and lower income class tend to use more domestic brands. Nevertheless, there are exceptions to this; as purchase preferences do vary, our qualitative research revealed. Purchase of domestic products is also influenced by attitudes towards domestic products and nationalistic ideology.

From almost half of our respondents, domestic products are considered to be made of a natural content if they are made in Kosovo. Product content is mainly evaluated by the products' visual appearance, especially in the categories where the products are stored in glass packaging. Nevertheless, the general perception from the qualitative research is that Kosovo citizens do look for quality in products, but do not necessarily directly correlate quality with natural products.

Home-made Ajvar, Pickled products and Jam are widely used in Kosovo's households. The main reasons production of these products occurs at home is because it is believed that they are healthier and cheaper. There is also a nostalgic factor related to this, as in many families it is tradition that in particular seasons home-made Ajvar, Pickled products and jam is prepared. It is worth mentioning that when respondents talk about home-made products, it usually means that they are produced in their homes, close family or relatives. However, it may occur that they purchase home-made production from someone they know and trust.

Ajvar

Total awareness of Kosovo's population regarding Ajvar domestic brands is 56% whereas total awareness of international brands is 44%.

The eye tracker analysis for the Ajvar shelf reveals that when respondents are purchasing Ajvar products they mainly are interested in looking at the brands, followed by special offers where applicable and the prices of the products.

The eye tracker analysis also clearly reveals that the attention of the respondents in the Ajvar shelf is concentrated in domestic products.

In terms of usage of Ajvar brands during last month, 21% of the population declared that they used a domestic Ajvar brand, whereas 10% declared that they used an international Ajvar brand, whereas 44% of them declared that they used home-made Ajvar last month.

The most popular packaging sizes are 720 grams and 550 grams.

Pickled Products

Total awareness of Kosovo's population regarding pickled domestic product brands is 34%, whereas total awareness of international brands is 26%.

Regarding the pickled products the participants were mainly looking at the products, but also prices and special offers. If we look at the product origin of the user's intention we see that the focus was slightly higher in international products.

In terms of usage of pickled products brands during last month, 33% of the population declared that they used a domestic pickled products brand, whereas 56% declared that they used an international pickled product brand, whereas 32% of them declared that they used home-made pickled products.

During the shopping walk/route, almost all participants choose either 680 grams or 720 grams packaging.

Ketchup

Total awareness of Kosovo's population regarding ketchup domestic brands is 71%, whereas total awareness of international brands is 76%.

During the shopping route attention was concentrated mainly in different varieties of packaging of domestic products. Compared to other categories the ketchup category does not have too many options, however what seems to have caught the attention of our shoppers is some international brands which were not familiar to them, or which they did not use before.

In terms of usage of ketchup brands during last month, 33% of the population declared that they used a domestic ketchup brand, whereas 56% declared that they used an international ketchup brand.

Choices during the shopping route and Kosovo's population were similar where majority was preferring 500 gr followed by 1000 gr in bigger households.

Fruit Juices

Total awareness of Kosovo's population regarding fruit juices is almost identical between domestic and international brands – for domestic brands it is 100% and for international brands it is 99%.

In terms of fruit juices, if we look at the user's intention we notice that the concentration is on domestic products, however not considerably more than international products.

And if we look at the shelf of international juices, popular brands were looked at first, and particularly people were concentrated to check out the variety of flavors of the popular international brands.

Because it is a product that is used often people seem to check the prices of this product more carefully, which is also visible in the picture below as the heat maps are green on the prices in a lot of products.

In terms of usage of fruit juices brands during last month, 64% of the population declared that they used a domestic fruit juices brand, whereas 35% declared that they used an international fruit juice brand.

Choices during the shopping trip and Kosovo's population were similar, where majority was preferring the 1-liter packaging.

Jam

Total awareness of Kosovo's population regarding jam domestic and international brands is identical – 42% for each.

Jam/confiture/compote are not used a lot by Kosovo citizens, which is also revealed by the qualitative research also. On average they purchase no more than 1 jar of jam monthly. Respondents wondered around the shop, because they were more interested to look out there, since lots of them did not consume it very much, and if they did, they declared that they normally choose an international brand that they know, and that they gotten to know from other categories.

In terms of usage of jam brands during last month, 13% of the population declared that they used a domestic jam brand, whereas 17% declared that they used an international jam brand, whereas 23% of them declared that they used home-made jam.

During the shopping route most of participants choose 500-1000 grams packaging. Whereas, the general population in the survey reported to mostly use the 800-1000 grams packaging.

Introduction

The Survey for the Market Research on Domestic Product Perceptions in Kosovo, is a project of the Kosovo Fruits and Vegetables Association (PePeKo). The research project aims to shed some light into the perception and behaviour of Kosovo's citizens towards domestic production.

The outcomes of this research are presented in this report, which is divided into two main parts.

The first part consists of general perception towards domestic products but as well as ingredients content and packaging are analysed

Whereas the second part consist of analysis of general perception and shopping behaviour towards five categories, presented in this order: Ajvar, pickled products, Ketchup, Fruit Juices and Jams.

The fieldwork was conducted by TNS Kantar Index Kosova.

The research project is supported by the USAID Agriculture for Growth and Rural Opportunities program.

METHODOLOGY

QUANTITATIVE SURVEY

The Survey for the Market Research on Domestic Product Perceptions in Kosovo research project was conducted with Kosovar Albanian plus[1] residents, aged 15+ years via face to face interview, TAPI (tablet aided personal interview), "in house" of respondent.

In total 1,104 effective interviews were conducted with a representative sample all over Kosovo.
The questionnaire was approx. 15-20 min duration on average, composed of close-ended questions and pre-coded open ended questions.

The fieldwork for this part of the research project was conducted during 30.11.2017-06.12.2017

Multi-staged random probability method was used and the selection process was carried out the following way:

Stage 1: Sampling points were allocated proportionally to regional and residential characteristics of the universe. (Projected split is around 40% urban vs. 60% rural, distributed into 7 regions. No more than 8 effective respondents per sampling points.)

Stage 2: Selection of a household using random-route technique. (Each sampling point is assigned starting point and given direction. In urban areas the selected household is each third house/address on the left-hand side of the street. In block-of-flats the selected household is every 3rd apartment, counting from the top floor in each entrance. In rural areas, the selected household is every 3rd inhabitable dwelling on both sides of the interviewer's route, counting them wave-wise. In rural settlements with dense and compact pattern, the selection procedure resembles the one for urban areas.)

Stage 3: Selection of 1 respondent per household based on "next birthday" selection-key.

Stage 4: Substitution of designated respondent after three attempts (one initial visit and two call-backs) if the contact failed to result in completed interview (no replacement within the same household). The substitution is governed by the rules for selecting a household

To ensure quality, 15% of completed interviews back-checked by the supervisors and the management team, and all completed questionnaires were being subjected to quality control for proper administration.

[1] The Albanian plus universe also includes other ethnic groups, who live in the same environment, since the criterion defining the universe is the most common language used for daily public purposes

Qualitative Research

The Survey for the Market Research on Domestic Product Perceptions in Kosovo was complemented with a qualitative Shopper Experience of Kosovar Consumers.
The shopper experience was done with an eye-tracking device, followed up by a semi-structured interview.

The fieldwork for this part of the research project was conducted during 13.12.2017-14.02.2018

The 20 respondents, which were recruited were given a task to purchase a certain number of product categories in a specific supermarket

The shopping trip and in-depth interviews lasted approximately. 45 minutes

The target group for the research project was based on specific quota designed to serve the purpose of the research project, and is as follows:

1. Mothers and fathers aged 25-45 years old
2. Single males and females, aged 21-29 years old

The detailed sample description is found in the table below:

No.	Age	Gender	City	Household income
1	21-29 (Single)	Female	Prishtine	1000
2	25-35(with children)	Female	Prishtine	250
3	25-35(with children)	Female	Prishtine	1900
4	36-45(with children)	Female	Fushe Kosove	700
5	36-45(with children)	Female	Prishtine	500
6	21-29 (Single)	Male	Prishtine	150
7	25-35(with children)	Female	Prishtine	500
8	21-29 (Single)	Male	Vushtrri	500
9	46-55(with children)	Male	Prishtina	200
10	46-55(with children)	Female	Lipjan	240
11	46-55(with children)	Female	Prishtina	150
12	36-45(with children)	Male	Prishtina	800
13	21-29 (Single)	Male	Prishtina	400
14	25-35(with children)	Male	Prishtina	1500
15	25-35(with children)	Female	Prishtina	800
16	36-45(with children)	Male	Prishtina	300
17	25-35(with children)	Female	Prishtina	250
18	46-55(with children)	Male	Lipjan	900
19	21-29 (Single)	Male	Prishtina	1000
20	46-55(with children)	Male	Prishtina	1100

Eye Tracker Technology

The eye tracker is a device which consists of sensors (camera + projectors) and algorithms. The custom-designed sensors are designed to be a high-performance sensor and consisting of custom components and advanced optics.
The device helps understand users' intentions as the eye tracking device knows where the user's focus is at any given point in time.

This powerful information was used to create a intuitive user experiences, and was followed up with questions in order to elaborate their choices and behaviours further to answer the research questions.

With the eye trackers we were able to “know” our user's intentions because it is safe to say that what they looked at is a good approximation of what they think.

Heat maps coloring:

- Yellow - means the least number of fixations and fixation duration with various levels in between
- Green – avarage number of fixations at the same point and a longer fixation duration
- Red - a high number of fixations at the same point and a longer fixation duration

The information obtained via the eye tracker technology helped us to gain deep insights into consumer behavior and helped us in trying to provide some answers to why and how Kosovar citizens purchase products from the five categories of interest.

1. Main Findings

1.1 Perception towards domestic products

Domestic products are being widely used in Kosovo according to the research participants, although that highly depends on their household income, and other factor like age and type of residence (urban/rural), but also behavioral patterns and attitudes towards domestic products.

Households with higher incomes tend to use international brands more, whereas households from middle and lower income class tend to use more domestic brands, although there are exceptions to this, as purchase preferences do vary, our qualitative research revealed. Purchase of domestic products is also influenced by attitudes towards domestic products and nationalistic ideology.

Kosovo declared independence from Serbia in 2008, which move was not welcomed by Serbia. For a long time there were no relations, which changed for the better recently because a dialogue between these two governments, facilitated by European Union started.
Nevertheless, the wounds are deep and the negative attitudes of Kosovo Albanians exist towards purchasing products from Serbia.

There were many campaigns calling for boycotting Serbian products in the recent years which might have contributed to substituting Serbian products with similar products produced in Kosovo. Although one might argue about the effect of the campaigns considering that import of Serbian products in Kosovo is still up this day quite high.

There is also a strong preference towards International brands because international brands are believed to be more of a higher quality, although they are not being purchased considerably more compared to domestic products mainly because of their higher price.

With that being said, households with high incomes seem to be more sporadic users of domestic brands, however we have to highlight that purchase behavior depends from category to category.

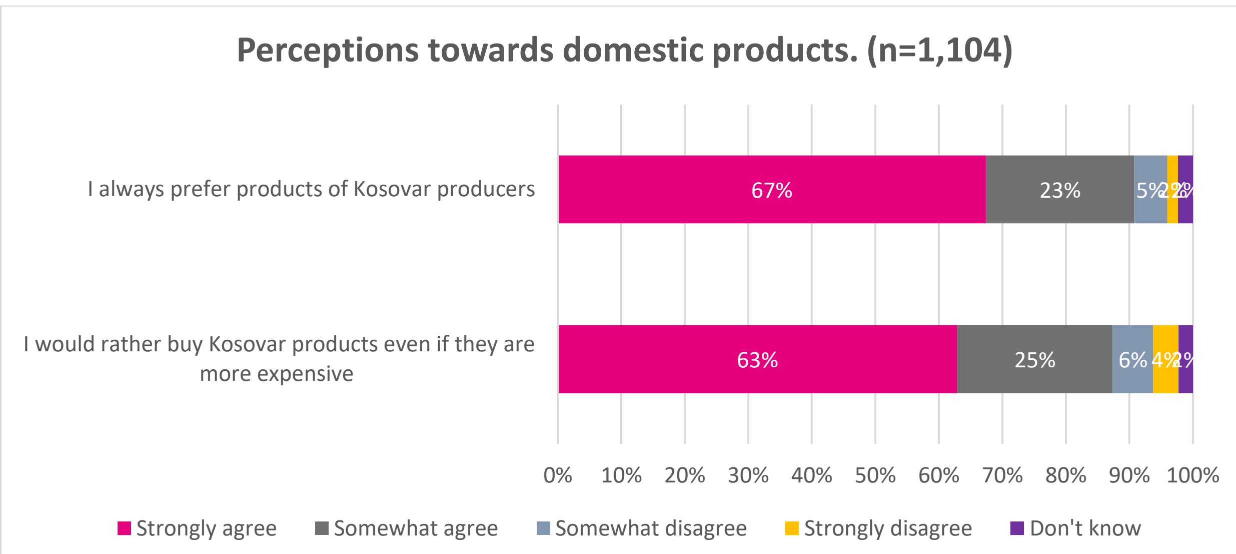
Even though purchase behaviors in terms of origin of product may vary, and not all participants declared that they use domestic products, vast majority of the respondents during the in-depth interviews highlighted that domestic brands should be placed in the shelf areas where they are easier to reach and are more visible for the reason of supporting domestic producers. More than half of the respondents in the qualitative research even expressed that specific shelf place should be dedicated specifically to domestic brands.

In order to understand the attitude towards domestic products we have asked Kosovo’s general population to state their agreement/disagreement with various statements related to domestic products.

On the statement if they always prefer products of Kosovar producers, 67% of Kosovo’s population strongly agreed with this statement, 23% somewhat agreed, and 5% somewhat disagree and only 2% strongly disagreed with this statement. When digging deeper in the demographic profile of our sample it turns out that rural areas prefer more products of Kosovar producers compared to people living in urban areas.

Whereas on the question if they would rather buy Kosovo products even if they are more expensive, the percentage of people who strongly agree with this statement is considerably lower 64% however still very high, whereas 25% somewhat agree with this statement, 6% somewhat disagree and 4% strongly disagree with this statement.

Looking at the demographic profile we understand that in general females are more skeptical towards the idea that they would purchase Kosovo products even if they are more expensive compared to men. This is most likely due to the fact that in most of the cases women are in charge of doing the weekly/monthly food supply household shopping, or at least providing the list of products needed to be purchase, thus they are more objective towards weekly/monthly expenditures for household food supply.



Graph 1: Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the statements

In general, also from the in-depth interviews there seems to be a consensus in terms of opinions that Kosovo produced products need to be supported, even from the people that are not frequent and regular consumers of domestic products. Whereas the most common reasons for this consensus are to support fellow Kosovar citizens, but also to support the economy in general.

1.2 Perception towards ingredients, content and packaging

The perception towards ingredients, content and packaging has been largely discussed, and opinions have been gathered mainly from the qualitative research, but the general population was asked some questions related to this.

During the in-depth interviews people have not expressed too much importance directed to ingredients list of the products. They declared that they evaluate the product content mainly by the products' visual appearance, especially in the categories where the products are stored in glass packaging. From almost half of our respondents, domestic products are considered to be made of a natural content if they are made in Kosovo.

Many of the respondents in the in-depth interviews were of the opinion that domestic producers know the origin of the products that they use.

A shopping experience one respondent stated during the in-depth interview that "If I buy a Kosovar product, I know that the plants use do make the product did grow here, and I know that the producer knows or owns the land where the products are being cultivated".

Respondents from the in-depth interviews expressed that they prefer that the products are being stored in glass jars because glass is perceived to keep the products fresher.
Another factor that they expressed pro the glass jars is that it enables them to have a better view of the content since glass is see-through in most of the cases.

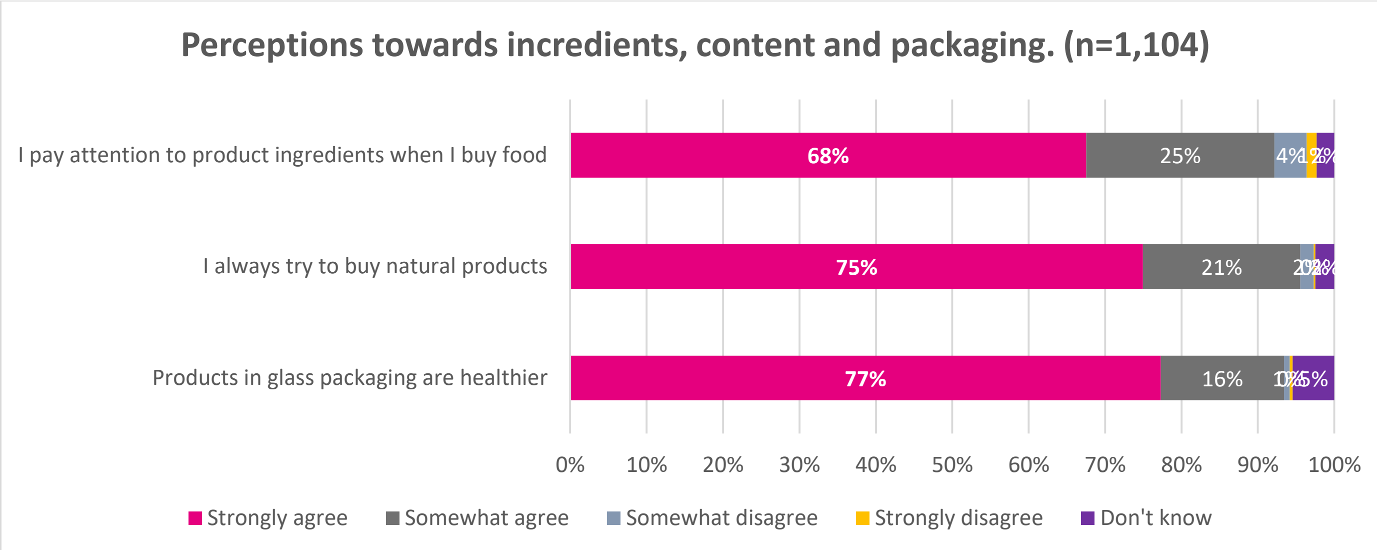
Kosovo's population in the survey, regarding their attitudes towards ingredients, content and packaging of products they purchase, expressed the following:

Kosovo's population have declared that they do pay a lot of attention to ingredients when they buy their food, where 68% of Kosovo's population strongly agreed with the statement, 25% somewhat agreed, 4% somewhat disagreed and only 1% strongly disagreed with this statement.

The data also reveals that younger age groups up to 44 years old are more prone to pay attention to the ingredients compared to the Kosovo's citizens 45+ years old. There is also a trend that is notable if we look at respondents' income. The higher the income their awareness and attention towards ingredients increases.

Moreover, 75% of Kosovo population declared that they strongly agree with the statement that they try to use natural products, 21% somewhat agree, and 2% somewhat disagree with this statement.

Also, a considerable percentage, namely ¾ of Kosovo's population strongly believes that products stored in glass are healthier.



Graph 2: Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the statements

Nevertheless, the general perception from the qualitative research is that Kosovo citizens do look for quality in products, but do not necessarily directly correlate quality with natural products. They have not expressed a lot of concern in terms of bio production, but their evaluation of products seems to be highly influenced by marketing campaigns, including TV commercials and product placements.

2. Ajvar

2.1 Overall product awareness and usage

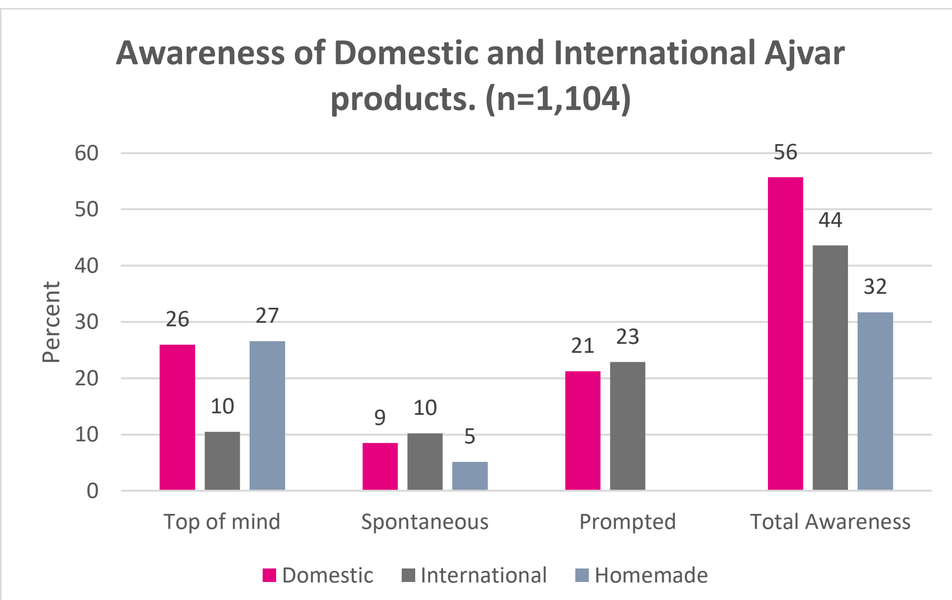
Awareness of brands of Ajvar products in general is quite high. Namely 26% of Kosovo's population were able to name a domestic brand, whereas only 10% of Kosovo's population was able to name an international Ajvar brand, when looking at top of mind awareness.
In terms of spontaneous and prompted awareness difference in knowledge of brands is almost no existent, with spontaneous and prompted awareness about international Ajvar brands being slightly higher compared to domestic brands.

When looking at specific brands, also here Domestic brands prevail specifically Domestic brand 1&2, followed by International brand 1, 4 and 6.

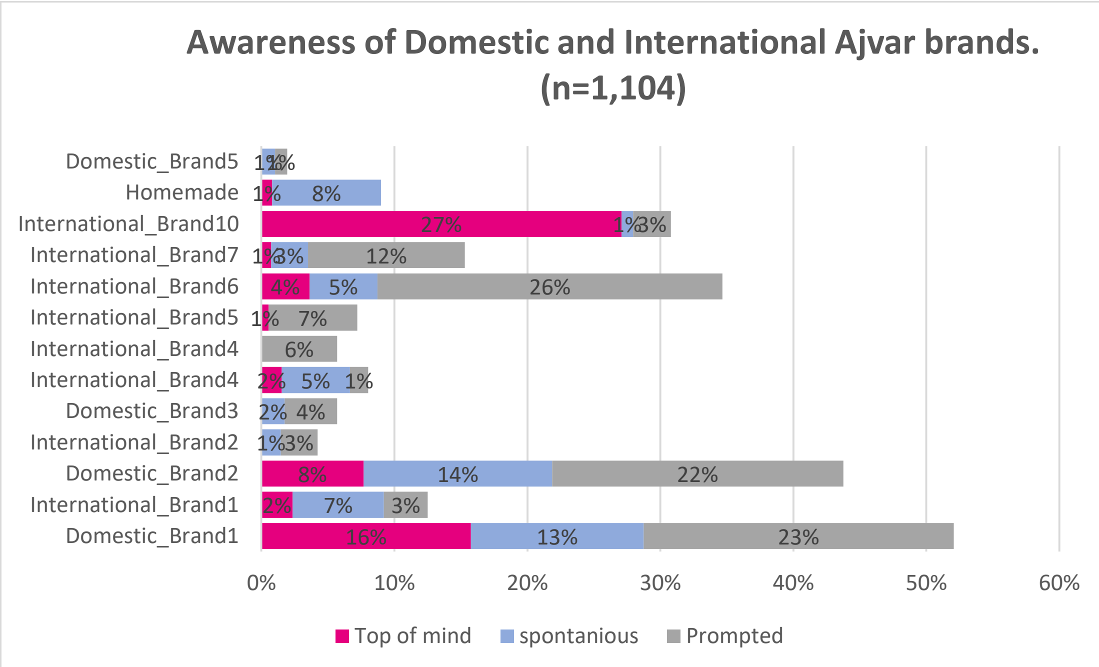
Whereas in terms of prompted awareness International Brand 6 is the most recognized one followed by Domestic brand 1 and 2.

There are a handful of domestic companies producing Ajvar, which also produce a wide range of other products in the food categories. This fact might have contributed to the high awareness of domestic brands, where we can conclude that 56% of Kosovo's population are aware of domestic Ajvar brands.

Percentage of total awareness of international products is 44%, however when comparing the choices of the respondents during the shopping the choice of brands in the store is much higher amongst the international Ajvar products.



Graph 3: Please tell me which brand of ajvar sold in stores comes to your mind first?
What other brands of ajvar do you remember?
Have you ever heard of?



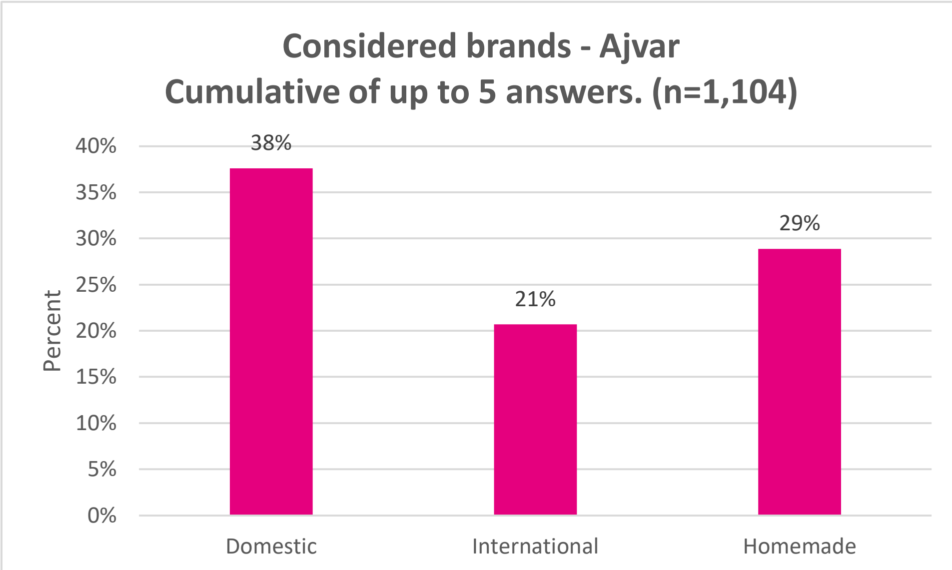
Graph 4: Please tell me which brand of ajvar sold in stores comes to your mind first?
What other brands of ajvar do you remember?
Have you ever heard of?

In order to understand better the attitudes toward domestic brands, we have asked our sample to put themselves into the position of thinking of what brand would they buy if they went to the store today to buy an Ajvar.

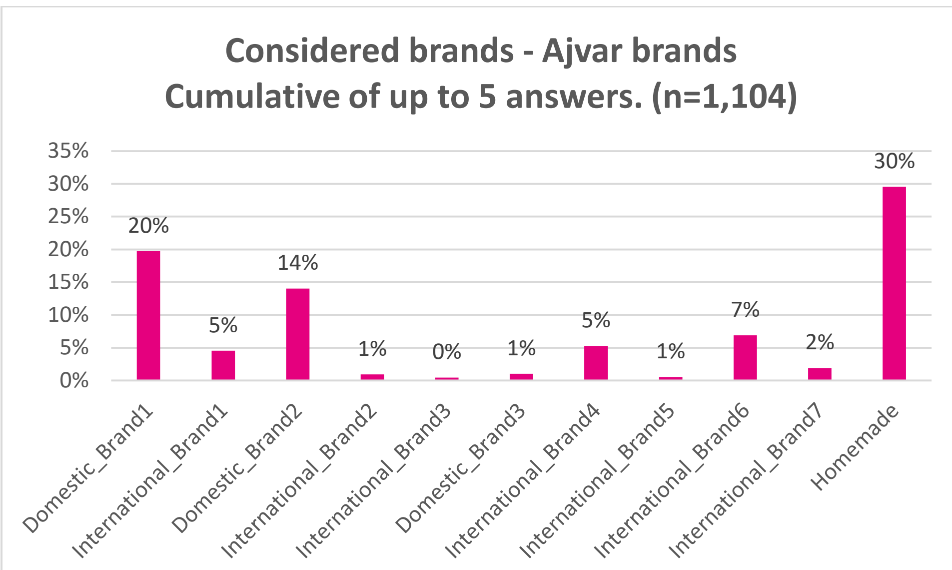
The research reveals that 38% of the population if they went to the store today they would consider buying a domestic brand, whereas 21% of the Kosovo's population declared that they would consider buying an international brand.

When looking at brands Domestic brand 1&2 were significantly higher 20% and 14% respectfully whereas for International brands, International brand 6 and 7 seems to be the attractive Ajvar products 7% and 5% respectfully.

These results are also similar to the choices of the respondents of the in-depth interviews, where the numbers were even higher; 65% of the respondents choose to purchase a domestic Ajvar product in the supermarket.



Graph 5: Which brands of ajvar would you consider buying if you went out for shopping today?



Graph 6: Which brands of ajvar would you consider buying if you went out for shopping today?

2.2 Focus and consciousness of products, intuitive user experiences using eye tracker

The analysis with the eye trackers for the Ajvar shelf, reveals that when respondents are purchasing Ajvar products they mainly are interested in looking at the brands, followed by special offers where applicable and the prices of the products.

The analysis with the eye trackers also clearly reveals that the attention of the respondents in the Ajvar shelf is concentrated in domestic products - all the products where the heat maps are marked in red are domestic products.

Although the respondents did wonder around in the shelf, where international brands also take a lot of their attention, since a lot of international brand are marked with green and yellow heat maps, ultimately domestic brands take most of their attention while checking the Ajvar shelf.

Ajvar is one of the products that the Kosovo citizens like to produce at home. The data from the quantitative study reveal this as well, where respondents answer that they at some degree use Ajvar which is produced at home or home or family and relatives.

Nevertheless, the idea of buying a product made in Kosovo seems closer to a home-made product rather than buying a product that has been produced in another country although packaging and words like “home-made” used in packaging seems to be contributing in convincing the respondents to choose one Ajvar product over another.

With that being said the prices of the domestic Ajvar producers in general are lower, this is one of the key reasons why domestic producers were chosen over international producers, especially the heavy users of Ajvar.

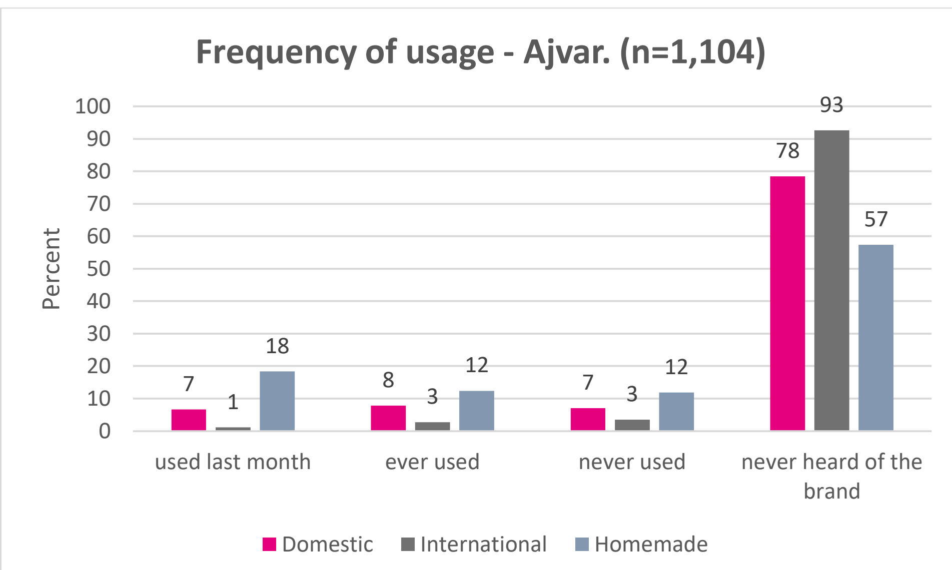
Picture 1&2: Clean shelf picture and Heat map: Ajvar

2.3 Frequency of usage

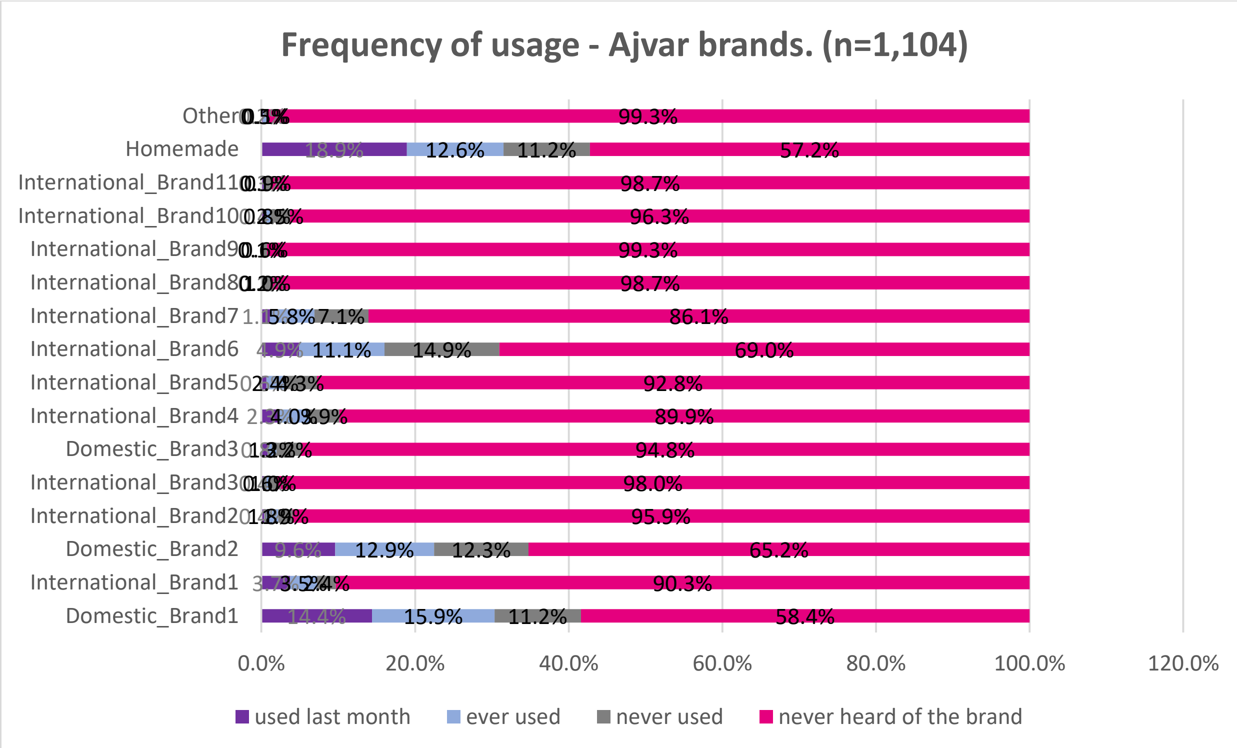
We have also asked our sample about their frequency of usage of Ajvar. Kosovo's citizens declared that they use domestic products more compared to international products.
Our research reveals that 7% of the respondents declared that they used a domestic brand of Ajvar last month, another 8% declared that they ever used a domestic Ajvar product whereas 7% of the population declared that they never used a domestic Ajvar product.
Our sample namely, 78% of them declared that they never heard of the most popular domestic brands

Data in terms of usage are similar to preference. Domestic brand 1&2 are used most. Kosovo citizens, specifically 14% of them declared that they used Domestic brand 1 last month whereas declarations for usage of Domestic brands 2 last month are 10%.
Whereas 5% of Kosovo's population declared that they used International brand 6 last month.

In terms of the declarations of usage of international Ajvar brands the numbers are very low for last month usage and ever used and never used are at 3%.
Our sample namely, 93% of them declared that they never heard of the most popular international brands.

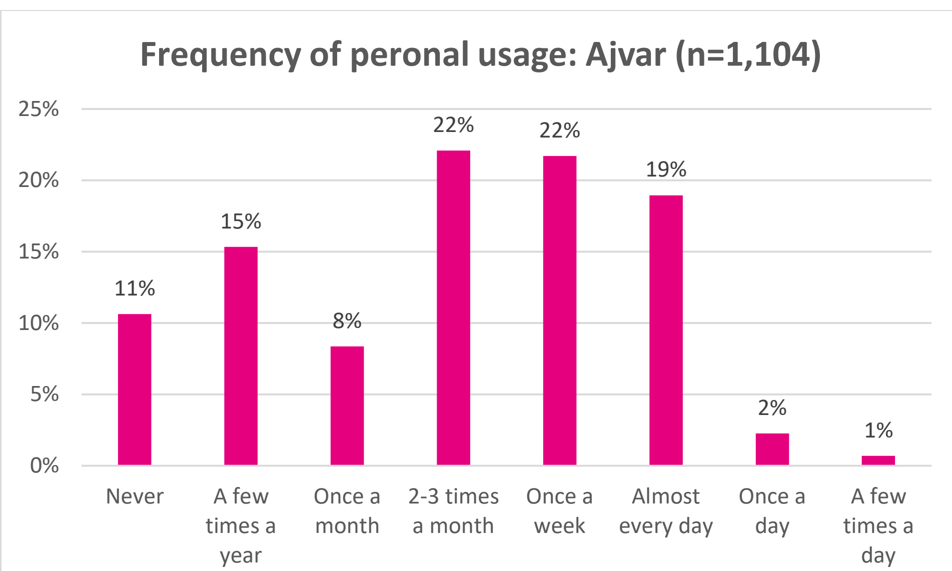


Graph 7: For these brands, please tell me...: Ajvar



Graph 8: For these brands, please tell me...: Ajvar

Whereas in terms of frequency of usage the behaviors of Kosovo's citizens seem to be quite diverse. Only 1% consumes it few times a day, 2 % daily, 19% of our sample consumes it almost every day, 22% once a week, 22% 2-3 times a month whereas there also considerably high percentages of people that consume less often, 8% consume it once a month, 15% a few times a year and 11% of the sample never consumes Ajvar products.

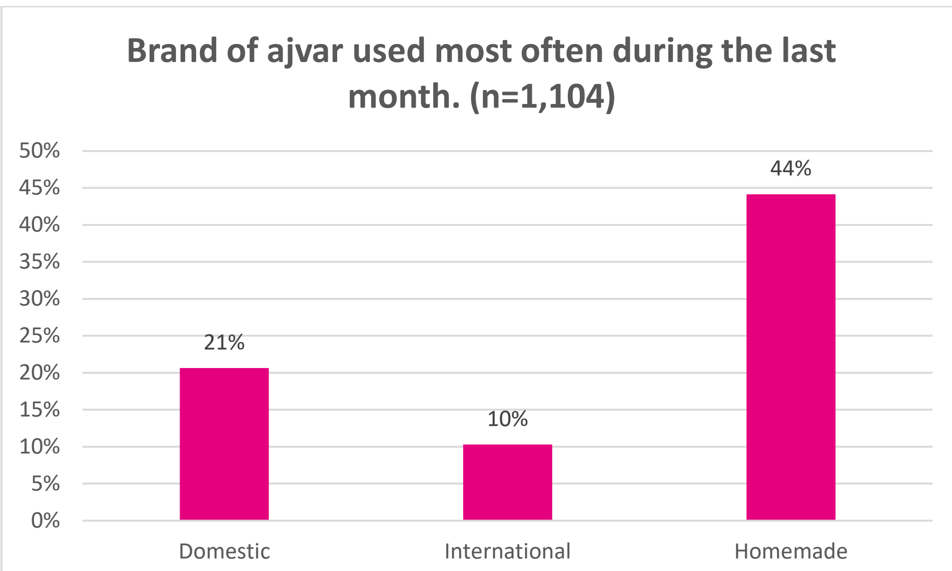


Graph 9: How often do you personally use ajvar?

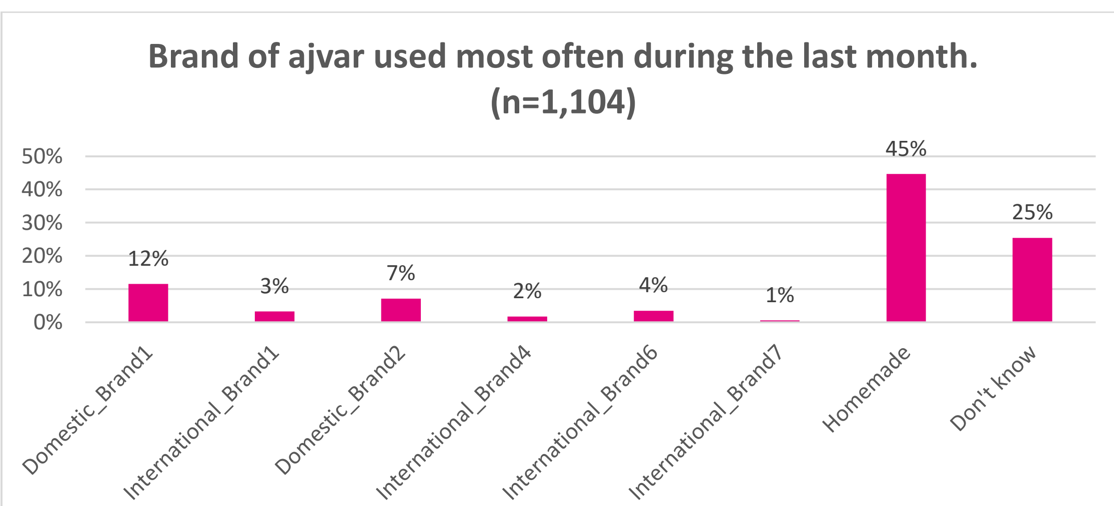
Our sample have been asked to declare their usage of Ajvar brand during last month.
21% of the population declared that they used a domestic Ajvar brand whereas 10% declared that they used an international Ajvar brand.

Kosovo's population declared that they used Domestic brand 1&2 most. Almost a quarter of them 12% and 7% declared that used Domestic brand 1&2 during the last month whereas International brands are used considerably less last month, with International brand 6 at 4% and International brand at 3%.

Home-made Ajvar seems to be very popular amongst Kosovo's citizens as 44% of them declared that they used a home-made Ajvar last month.



Graph 10: Tell me which brand of Ajvar have you used most during the last month?

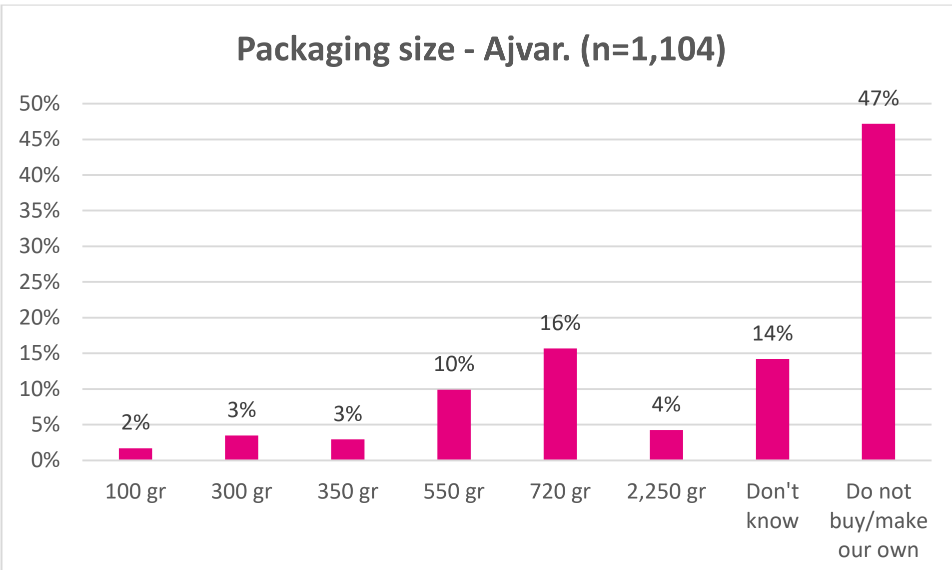


Graph 11: Tell me which brand of Ajvar have you used most during the last month?

2.4 Packaging

Whereas in terms of the size of the packaging of Ajvar, considering that there are not many variations the most popular sizes are 720 gr and 550 gr. Almost half of the sample did not give an answer to this question because they make their own Ajvar.

It is also apparent that there are not many variations in terms of size of Ajvar jars, especially amongst domestic Ajvar products, and in-depth interview respondents especially those coming from small households declared that in some cases they are forced to purchase international brands because domestic producers do not offer their products in smaller jars.



Graph 12: When buying ajvar, what is the size of the packaging you buy most often?

3. Pickled products

3.1 Overall product awareness and usage

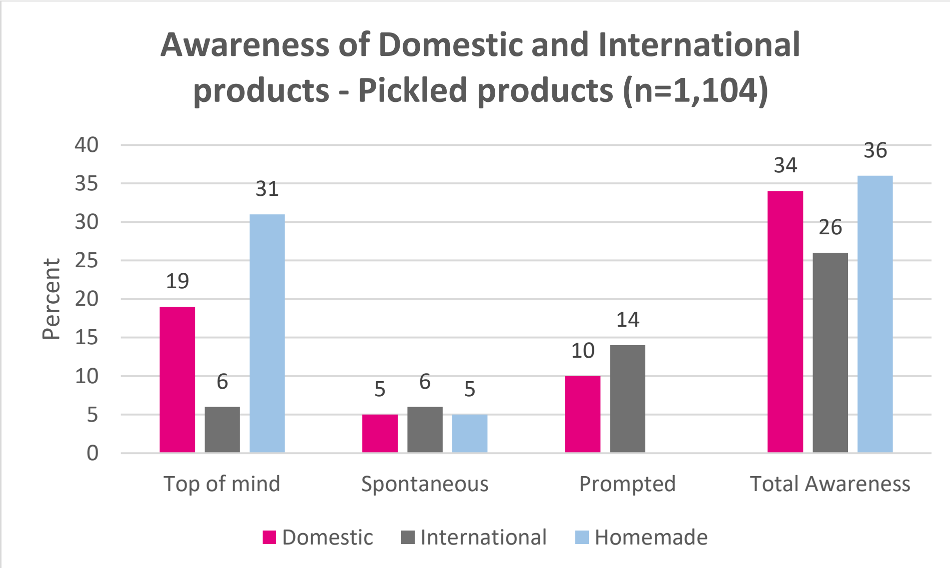
Awareness of brands of pickled products in general is on average. Namely 19% of Kosovo's population were able to name a domestic brand, whereas only 5% of Kosovo's population was able to name an international pickled product brand on top of their mind. In terms of spontaneous and prompted awareness difference in terms of knowledge of brands is small, with spontaneous awareness of domestic and international brands being similar, however prompted awareness about international pickled brands is 4% higher compared to domestic brands.

When looking at specific brands, top of mind Domestic brand 1&2 prevail, followed by International brand 6.

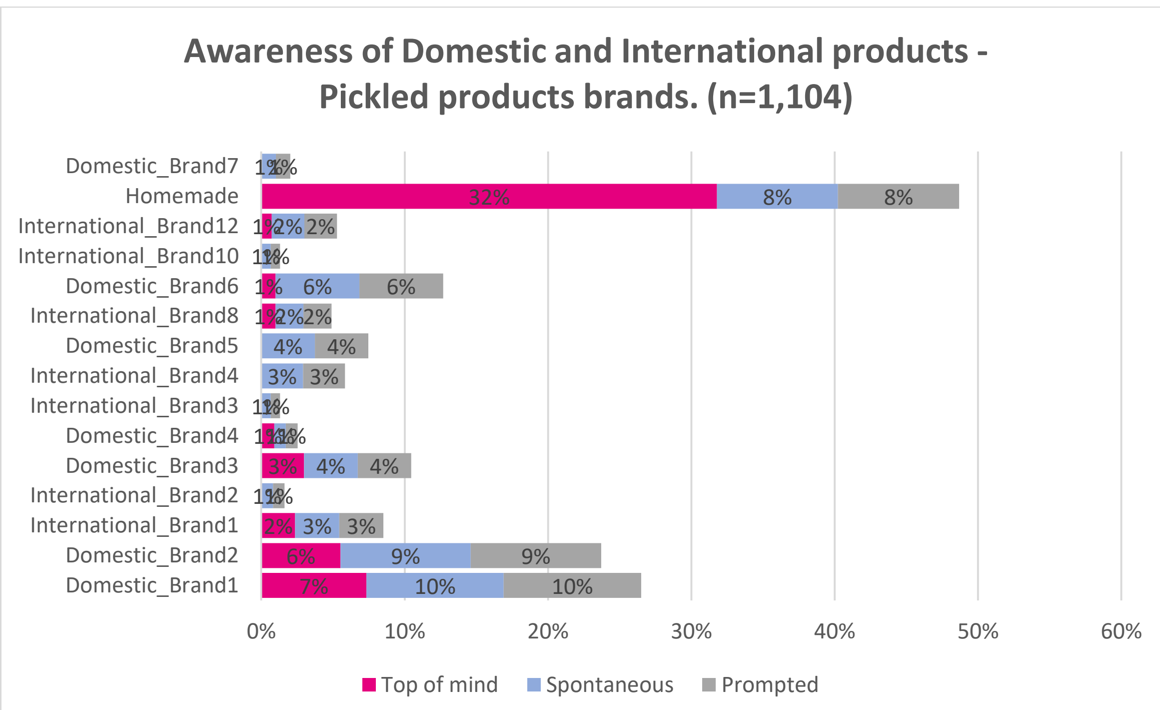
Whereas in terms of prompted awareness Domestic brand 1 and 2 are the most famous followed by International Brand 3.

Most popular pickled products our respondents have chosen on their shopping trip in the supermarket are fefferoni peppers, pickles, mushrooms and peppers.
However the in-depth interviews during the shopping reveals that pickled products are not used much, and if yes they prefer to make their own, thus the low awareness of brands especially that of international brands

The research reveals that 34% of Kosovo's population are aware of domestic brands of pickled products. Percentage of total awareness of international products is 26%, and also the choice of brands in the store is much higher amongst domestic brands, 60 and 65 percent of respondents choose to buy domestic pickled brands during their shopping trip as their first and second choice respectively.



Graph 13: Please tell me which brand of pickled products sold in stores comes to your mind first?
What other brands of pickled products do you remember?
Have you ever heard of?



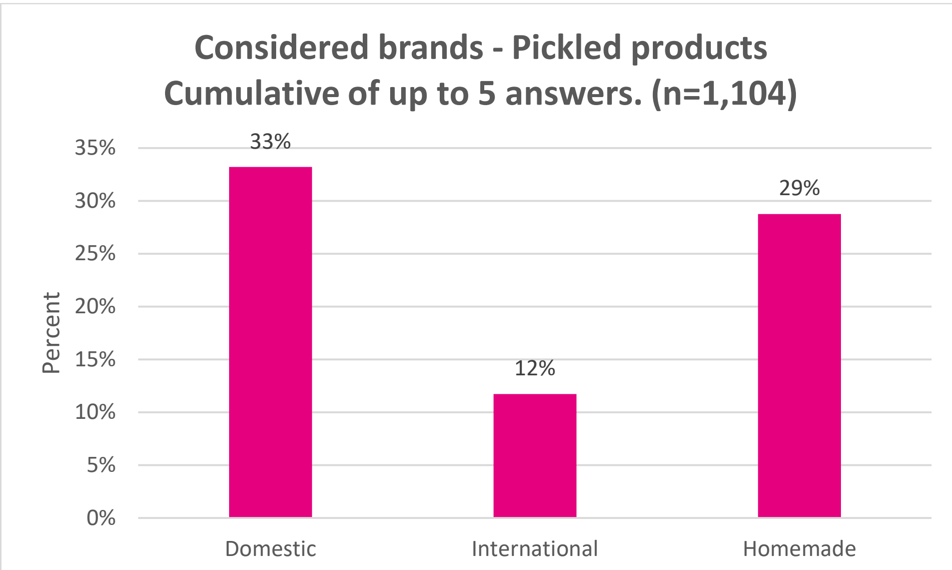
Graph 14: Please tell me which brand of pickled products sold in stores comes to your mind first?
What other brands of pickled products do you remember?
Have you ever heard of?

In order to understand better the attitudes toward domestic brands, we have asked our sample to put themselves into the position of thinking of what brand would they buy if they went to the store today to buy a pickled product.

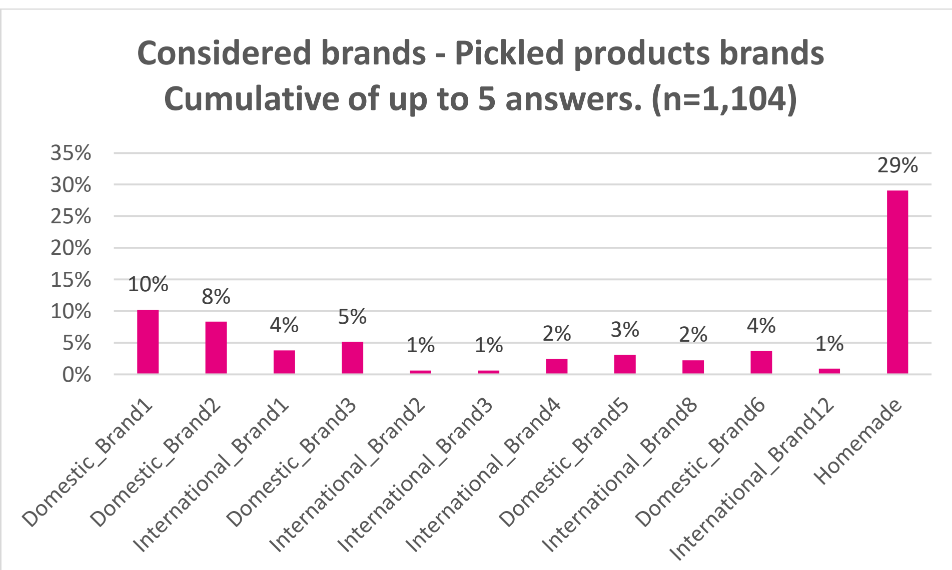
The research reveals that, 38% of the population declared that if they went to the store today they would consider buying a domestic brand, whereas 12% of the Kosovo's population declared that they would consider buying an international brand.

These results are also similar to the choices of the respondents of the simulated shopping trip where the numbers was even higher, 60% of the respondents choose to purchase a domestic product in the supermarket as a first choice and 65% as a second choice.

When looking at brands Domestic brand 1&2&3 were higher 10% and 8%, and 5 respectfully whereas for International brands, International brand 1 seems to be the attractive picked products brand



Graph 15: Which brands of pickled products would you consider buying if you went out for shopping today?



Graph 16: Which brands of pickled products would you consider buying if you went out for shopping today?

3.2 Focus and consciousness of products, intuitive user experiences using eye tracker: Pickled Products

A lot of time was spent wondering around the shelf of the pickled products, and according to the heat maps, participants were mainly watching the products, but also prices and special offers.
During the shopping experience we asked the respondents to choose a pickled product and a substitute pickled product in case their product of choice would be out of stock. Their choses were mostly fefferoni peppers and pickles and in few cases mushrooms and peppers.

With that being said the results of the eye reveals that the user's intentions of our sample was not limited to fefferoni peppers and pickles, actually the concentration in peppers as well as new products like white asparagus and mix pickled vegetables, was also quite high compared to fefferoni peppers and pickles.

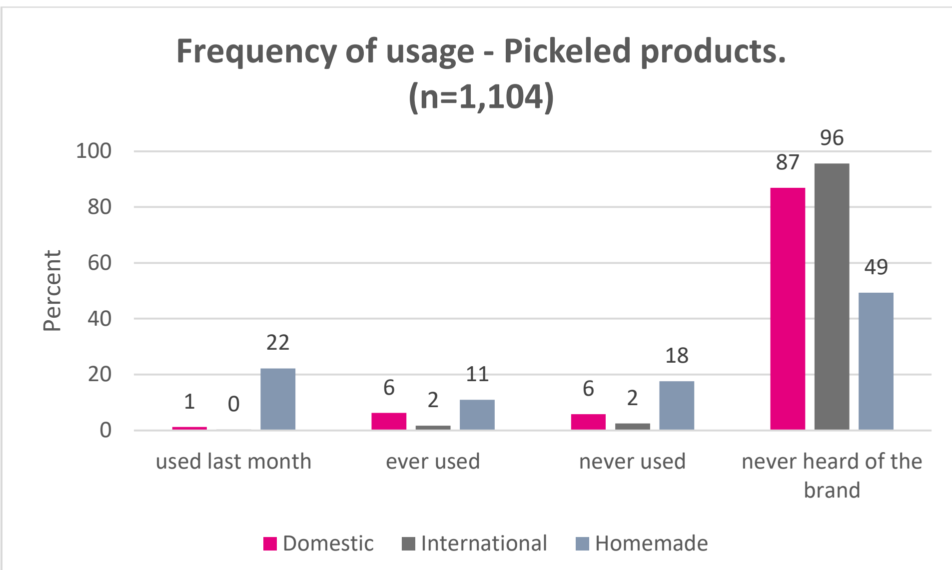
If we look at the origin of the user’s intention we see that the focus was slightly higher in international products. The main focus was on fefferoni peppers in domestic but also international brands, the same was in terms of peppers
Regarding mix pickled vegetables the focus was concentrated in an international brand, the same case was the case with pickles.

Picture 3&4: Clean shelf picture and Heat map: Pickled products

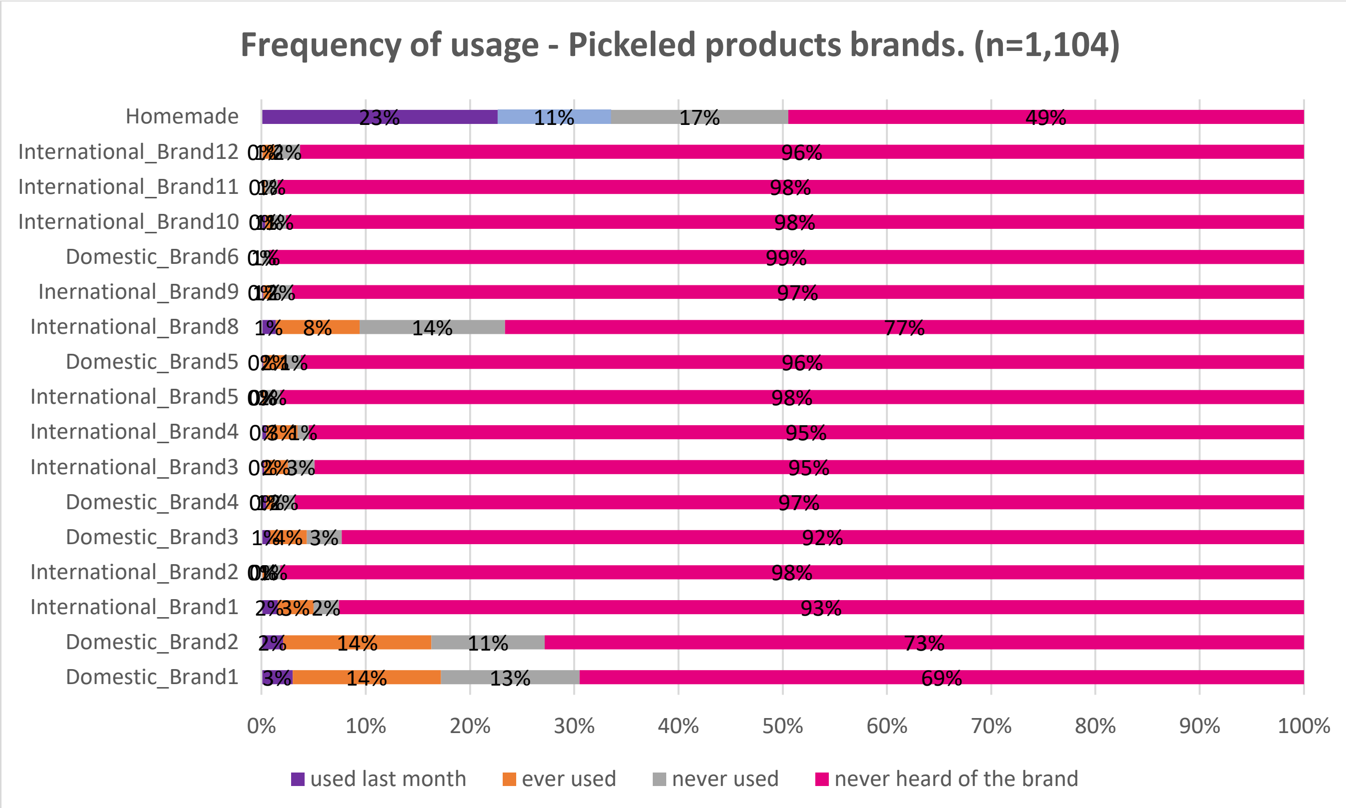
3.3 Frequency of usage

We have also asked our sample about their frequency of usage of pickled products. Kosovo's citizens declared that they use domestic products more compared to international products.
A small percentage 6% of the respondents declared that they ever used a domestic brand of pickled product, another 6% declared that they never ever used a domestic pickled product whereas usage and non-usage of international pickled products are almost non existent
Our sample namely, 87% of them declared that they never heard of the most popular domestic brands
Our sample namely, 96% of them declared that they never heard of the most popular international brands.

Data in terms of usage are similar to preference. Domestic brand 1&2 are used most, and in terms of international brand 8 is the most used one.

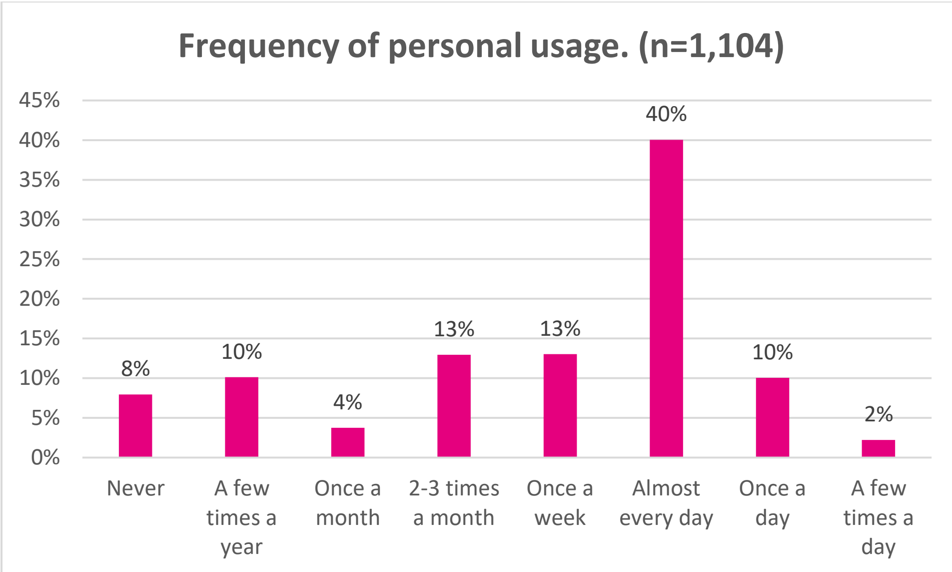


Graph 17: For these brands, please tell me...: Pickled products



Graph 18: For these brands, please tell me...: Pickled products

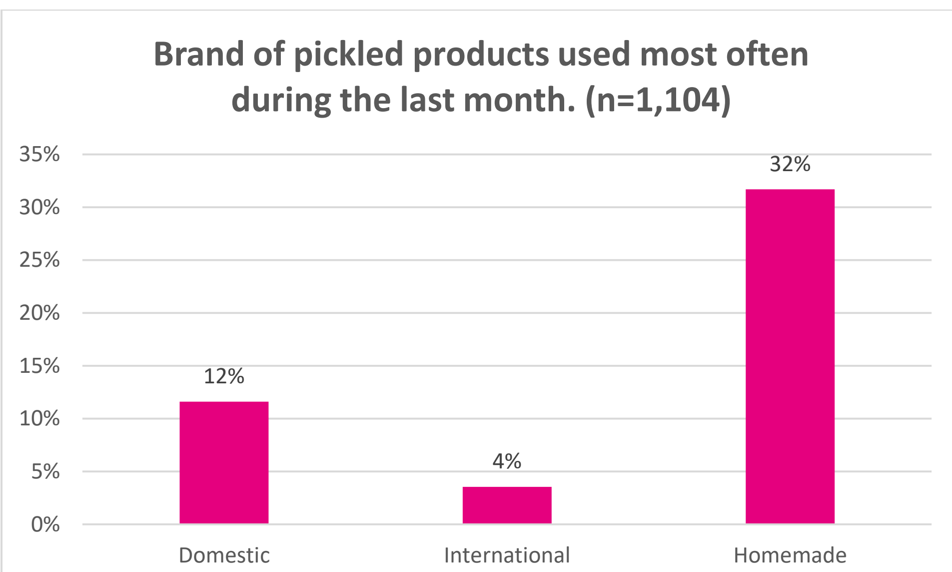
Whereas in terms of frequency of usage the behaviors of Kosovo's citizens seem to be quite diverse. Only 2% consumes it few times a day, 10% of our sample consumes pickled products daily, 40% of our sample consumes it almost every day, 13% once a week, 13% 2-3 times a month whereas there also considerably high percentages of people that consume less often, 4% consume it once a month, 10% a few times a year and 8% of the sample never consumes pickled products.



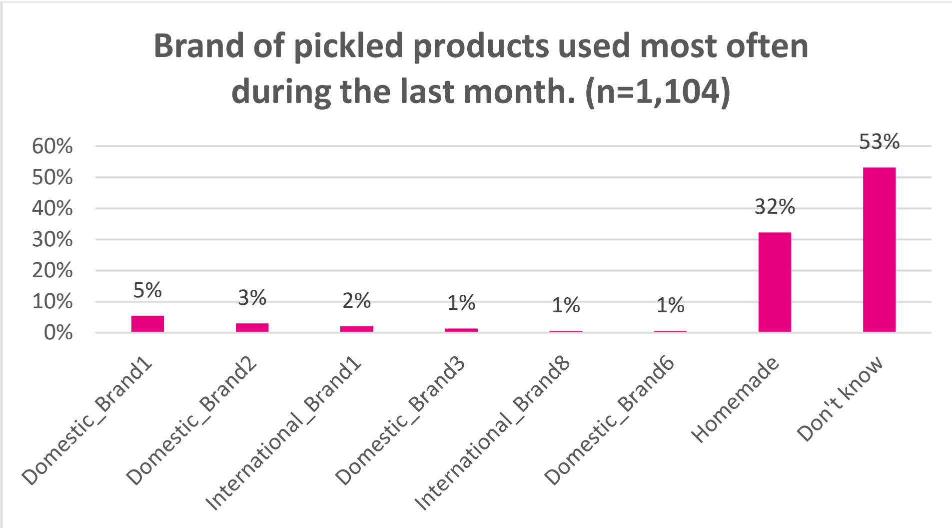
Graph 19: How often do you personally use pickled products?

Our sample have been asked to declare their usage of pickled product brand during last month. 12% of the population declared that they used a domestic pickled product brand whereas 4% declared that they used an international pickled product brand
Home-made pickled products are also very popular amongst Kosovo's citizens as 32% of them declared that they used a home-made pickled product last month.

Kosovo's population did declare very low percentages of brands of pickled products that they used last month, highest is domestic brand 1 with 5%.



Graph 20: Tell me which brand of pickeled products have you used most during the last month?

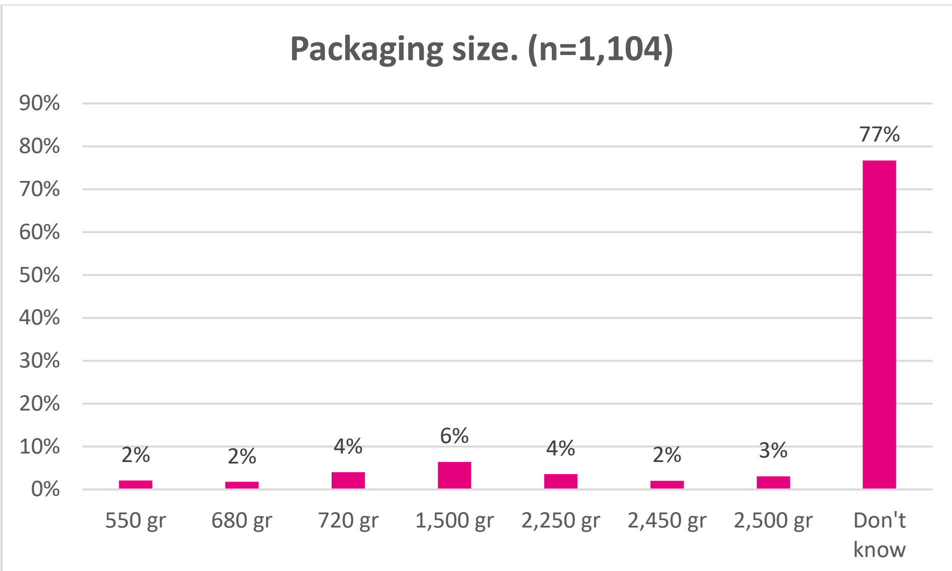


Graph 21: Tell me which brand of pickeled products have you used most during the last month?

3.4 Packaging

Whereas in terms of the size of the packaging of pickled, there are many variations the most popular size is 1500 g, however the preferences are very wide spread. ¾ of the population did not know and adequate answer to this question

During the shopping trip, almost all participants choose either 680 gr or 720 gr packaging.



Graph 22: When buying pickled products, what is the size of the packaging you buy most often?

4 Ketchup

4.1 Overall product awareness and usage

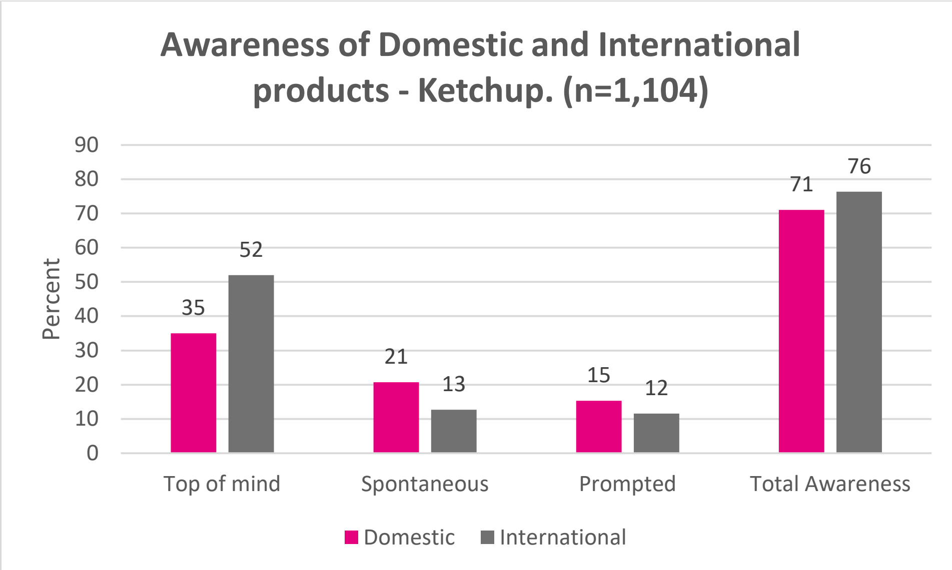
Awareness of brands of ketchup in general is very high. Namely 35% of Kosovo's population were able to name a domestic brand, whereas more than half 52% of Kosovo's population was able to name an international ketchup brand on top of their mind. In terms of spontaneous and prompted awareness difference in terms of knowledge of brands exist, with spontaneous awareness of domestic product being 8% higher and prompted awareness about domestic ketchup brands is 2% higher compared to international brands.

However the in-depth interviews during the shopping reveals that choice of ketchup products is rather limited, thus the high awareness of brands especially domestic brands, since those renowned brands produce variety of products in different food categories

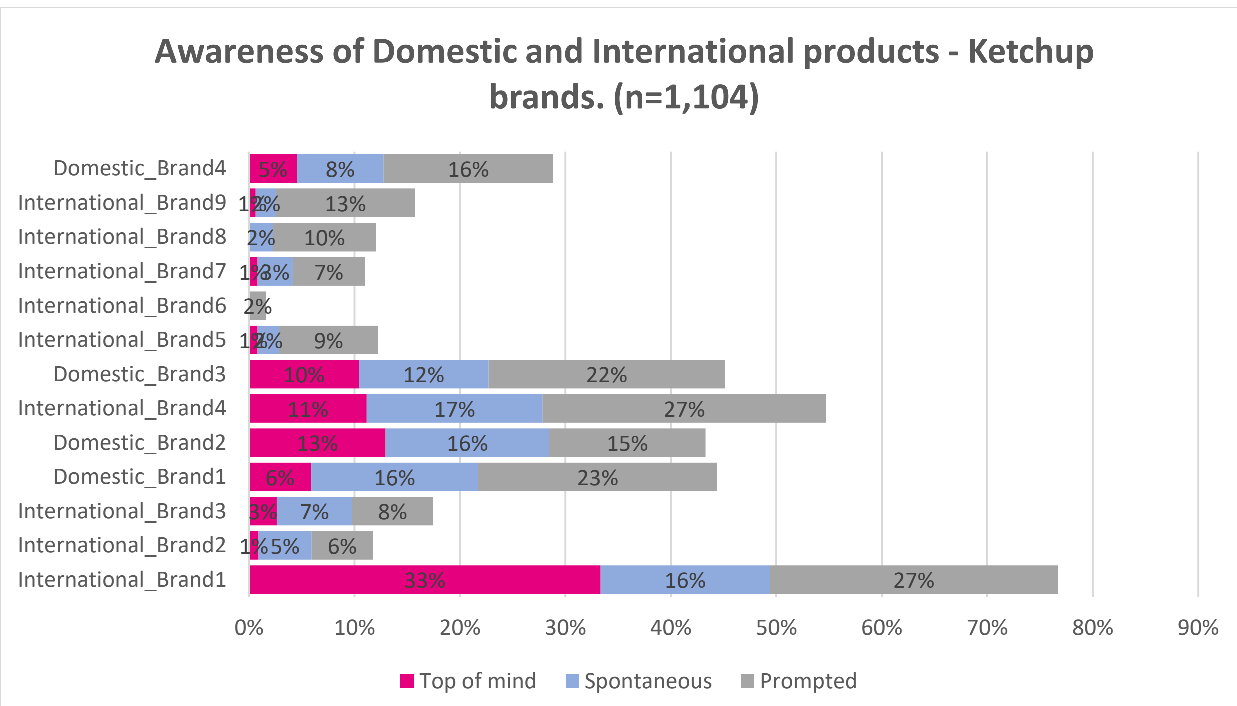
When looking at specific brands, International brand 1 is clearly the most mentioned brand in top of mind.

Domestic brands 2&3 have also a bit on top of mid awareness from Kosovo population, namely 13% and 11%.

With that being said 71% of Kosovo's population are aware of domestic ketchup brands. Percentage of total awareness of international products is 76%, and also the choice of brands in the store is much higher amongst international brands, 60 and 55 percent of respondents choose to buy international ketchup brands during their shopping trip as their first and second choice respectively.
Main reason of the choice of an international brand of ketchup is due to the fact that some of the respondents believe that the quality of domestic ketchup products is not very high, but also the price difference between domestic and international brands in the ketchup sector is not very high.



Graph 23: Please tell me which brand of ketchup sold in stores comes to your mind first?
What other brands of kethcup do you remember?
Have you ever heard of?



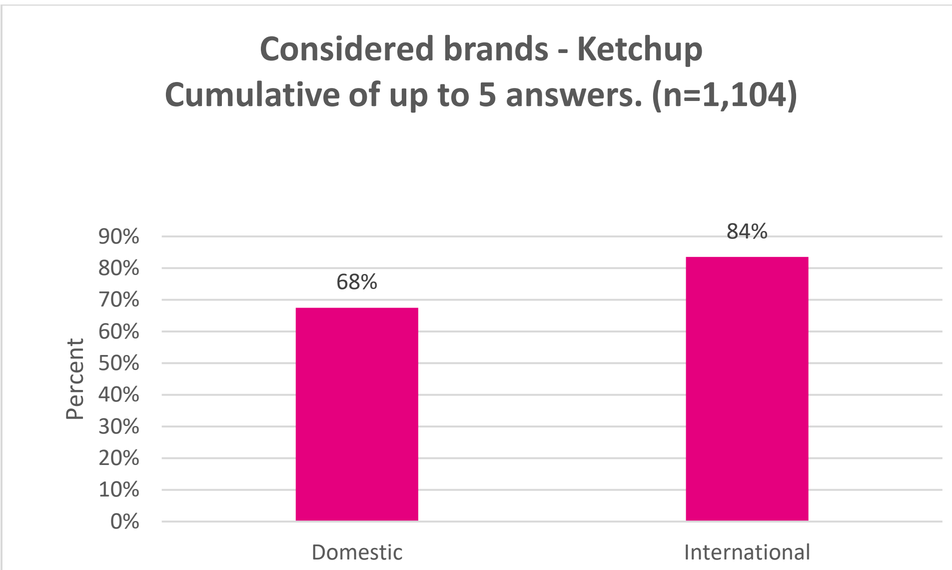
Graph 24: Please tell me which brand of ketchup sold in stores comes to your mind first?
What other brands of kethcup do you remember?
Have you ever heard of?

In order to understand better the attitudes toward domestic brands, we have asked our sample to put themselves into the position of thinking of what brand would they buy if they went to the store today to buy a ketchup.

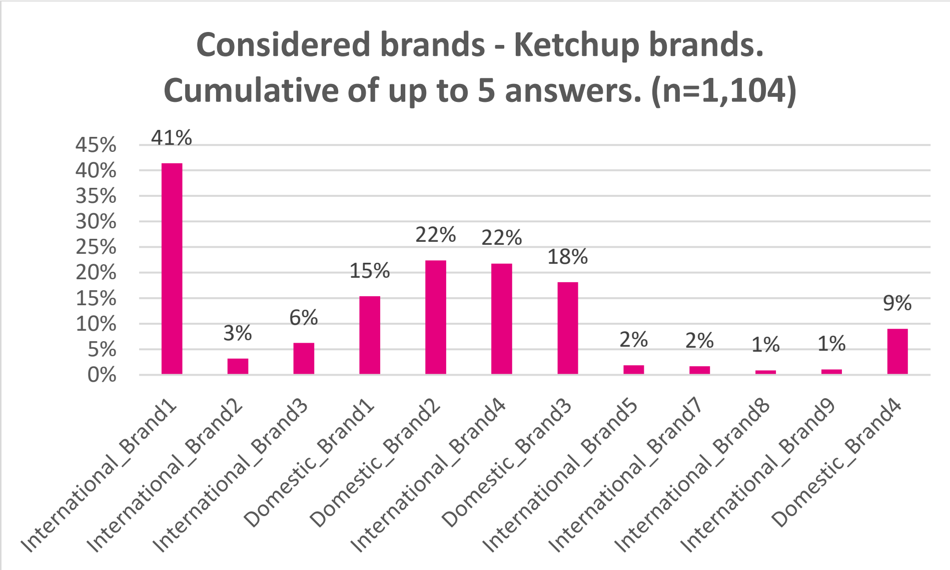
Our research reveals that 68% if they went to the store today they would consider buying a domestic brand, whereas 84% of the Kosovo's population declared that they would consider buying an international brand.

These results are also similar to the choices of the respondents of the simulated shopping trip where the numbers was even higher, 60% of the respondents choose to purchase a domestic product in the supermarket as a first choice and 55% as a second choice.

When looking at brands Kosovo's population would consider buying International brand 1 is significantly higher 41% compared to the rest of the brands.



Graph 25: Which brands of ketchup would you consider buying if you went out for shopping today?



Graph 26: Which brands of ketchup would you consider buying if you went out for shopping today?

4.2 Focus and consciousness of products, intuitive user experiences using eye tracker: Ketchup

The quantitative research revealed that in terms of ketchup, international brands are used more however the user's intentions during the shopping trip does not necessarily support the declared purchase behavior.

During the shopping trip attention was concentrated mainly in different varieties of packaging of domestic products.

Compared to other categories the ketchup category does not have too many option however what seems to have caught the attention of our shoppers is some international brands which were not familiar to them, or which they did not use before.

What strikes out is that when checking out these international products they have looked at the packaging but also at the prices of these products.

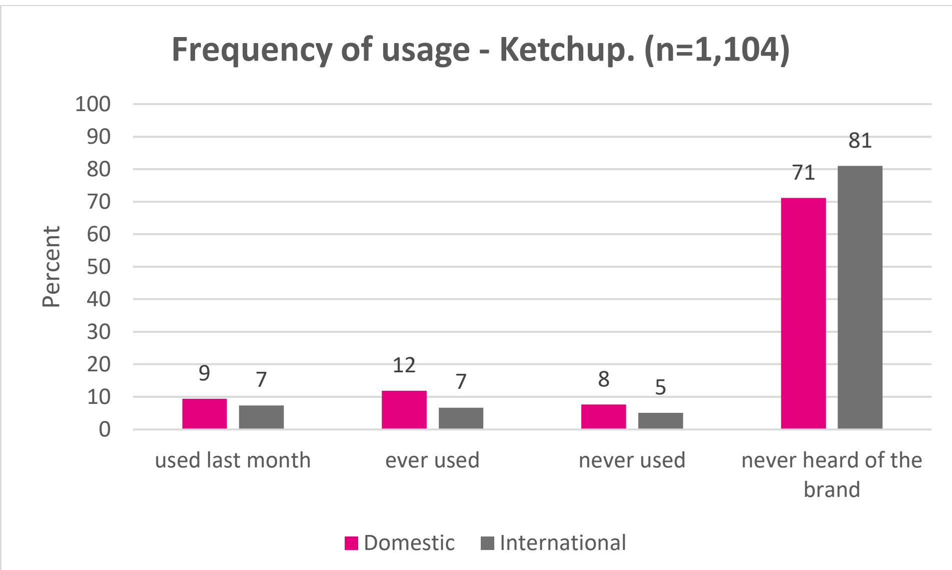
In general also during the shopping trip usage of international brands has been discussed and declared a lot, one can notice that also in terms of share of shelf space, international brands occupy a lot of space, more than half of the shelf space.

Picture 5&6: Clean shelf picture and Heat map: Ketchup

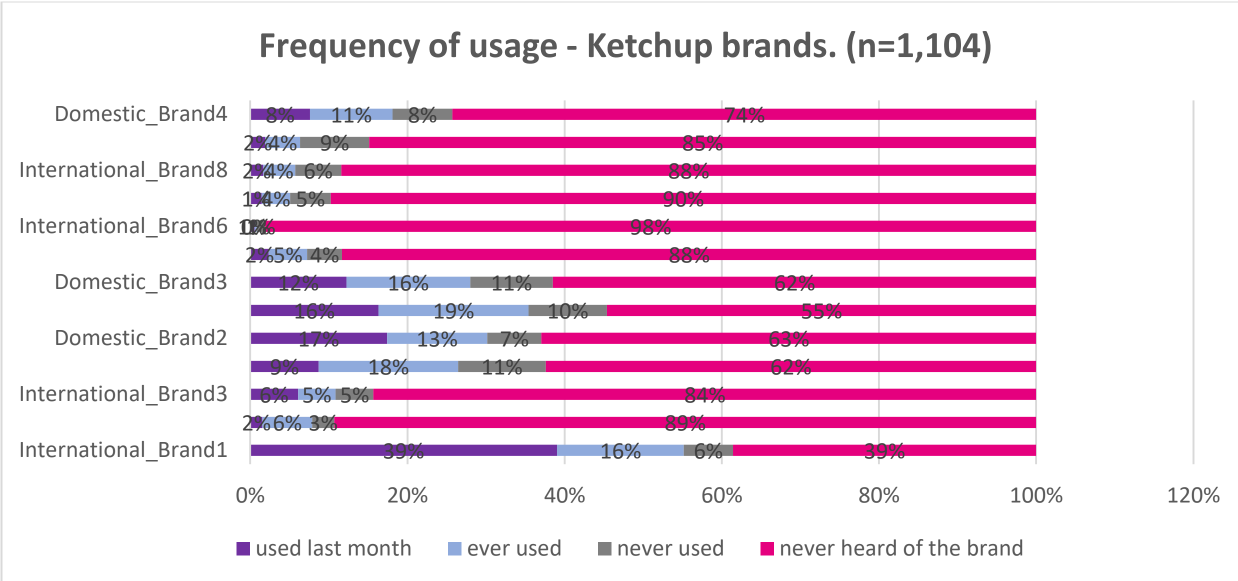
4.3 Frequency of usage

We have also asked our sample about their frequency of usage of Ketchup. Kosovo's citizens declared that they use domestic products more compared to international products in terms of ketchup.
A small percentage, 9% of the respondents declared that they ever used a domestic brand of ketchup last month, whereas 7% declared that they used an international brand of ketchup last month. 12% of Kosovo's population declared that they ever used a domestic ketchup product whereas declared usage and international ketchup product is 7%.
A small percentage, 8% never used a domestic ketchup and 5% never used an international product.
Our sample namely, 71% of them declared that they never heard of the most popular domestic brands
Our sample namely, 81% of them declared that they never heard of the most popular international brands.

Data in terms of usage are similar to preference. International brand 1 is used most. Kosovo citizens, specifically 39% of them declared that they used International brand 1 last month

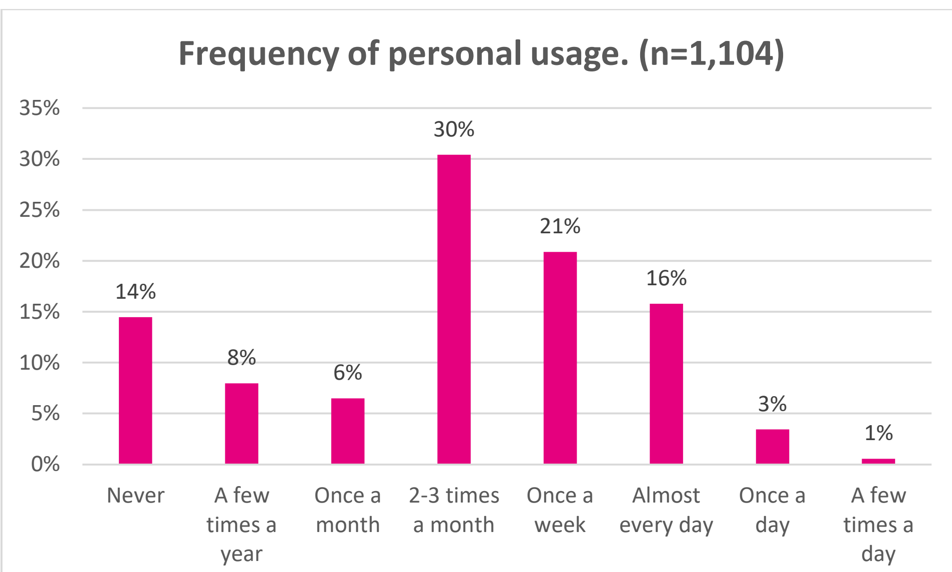


Graph 27: For these brands, please tell me...: Ketchup



Graph 28: For these brands, please tell me...: Ketchup

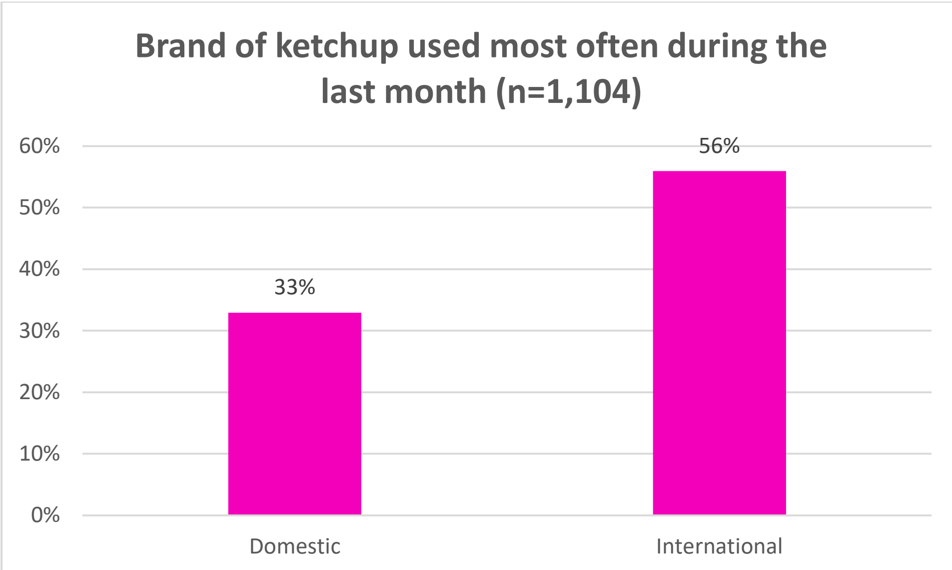
Whereas in terms of frequency of usage, the behaviors of Kosovo's citizens seem to be quite diverse. Only 1% consumes ketchup few times a day, 3% of our sample consumes it every day, 16% almost every day, 21% once a week, 30% 2-3 times a month 6 once a month, 6% consume it once a month, 8% few times a year and 14% of the sample never consumes ketchup.



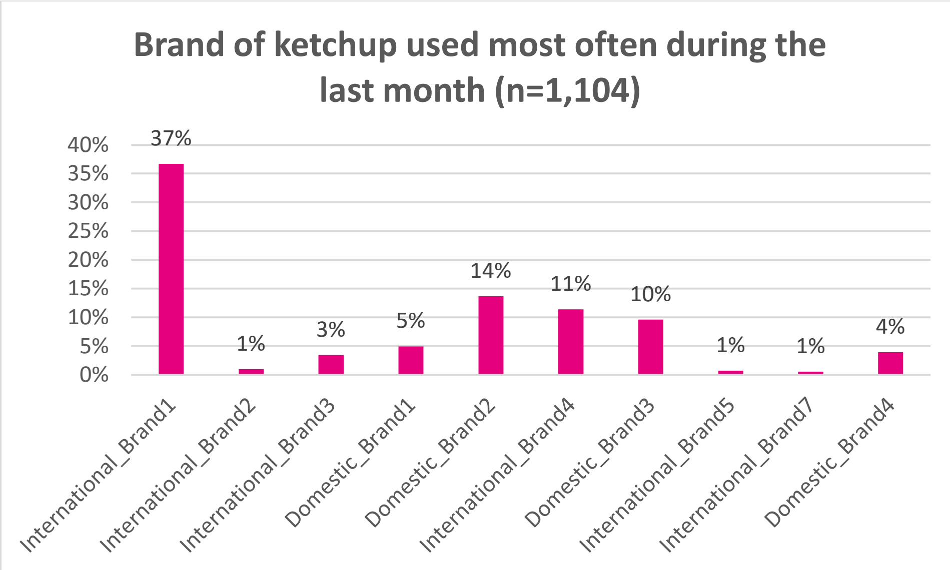
Graph 29: How often do you personally use ketchup?

Our sample have been asked to declare their usage of ketchup brands during last month.
The research reveals that 33% of the population used a domestic ketchup brand whereas more than the half namely 56% declared that they used an international ketchup brand.

Kosovo's population declared that they used International brand 1 most, 37% of the population. Domestic brand 2&3 are also used a lot namely by 14% and 10% of the population. International brand 4 is used by 11% of the population.



Graph 30: Tell me which brand of ketchup have you used most during the last month?



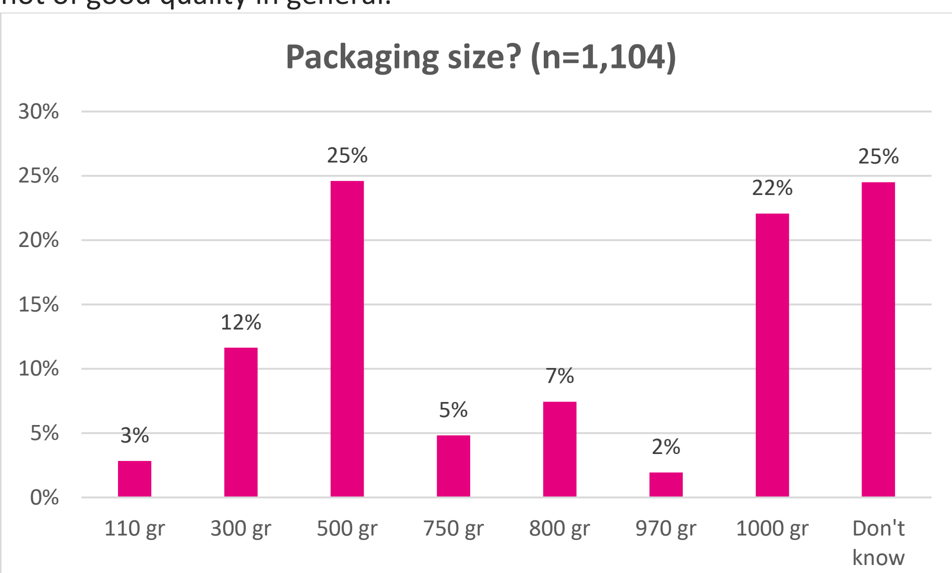
Graph 31: Tell me which brand of ketchup have you used most during the last month?

4.4 Packaging

Whereas in terms of the size of the packaging of ketchup, there are many variations the most popular sizes are 500 gr, however the preferences are quite wide spread, 1000 gr is also quite popular.

Choices during the shopping trip were similar where majority was preferring 500 gr followed by 1000 gr in bigger households.

It is worth mentioning that some packaging of especially domestic products was considered as not very convenient and user friendly, some had issues with the lid and some were considered not of good quality in general.



Graph 32: When buying ketchup, what is the size of the packaging you buy most often?

5. Fruit Juices

5.1 Overall product awareness and usage

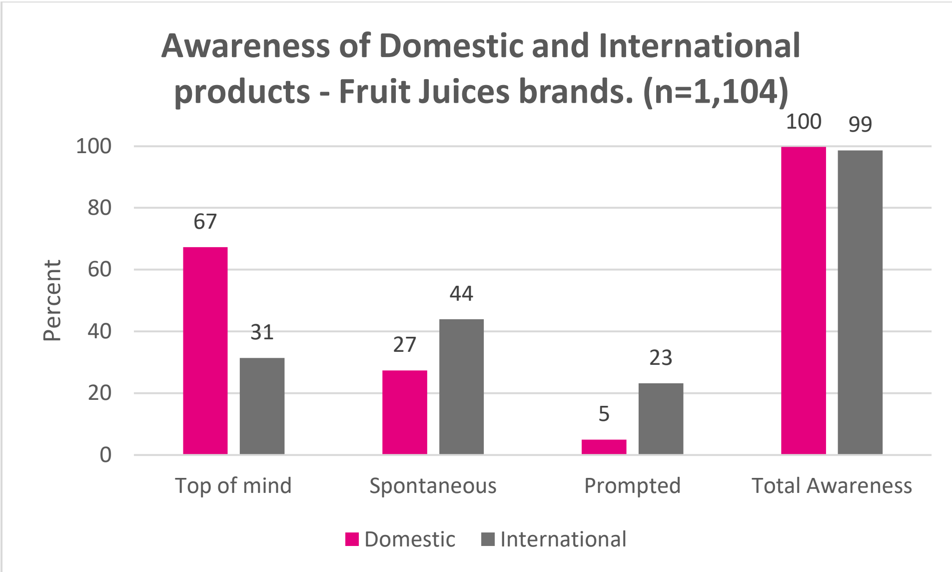
Awareness of brands of fruit juices in general is very high. Namely 67% of Kosovo's population were able to name a domestic brand, whereas only 31% of Kosovo's population was able to name an international fruit juice brand on top of their mind. In terms of spontaneous and prompted awareness difference in terms of knowledge of brands are quite high, with spontaneous awareness of international product being 17% higher and prompted awareness about international fruit juice brands is 18% higher compared to domestic brands.

However the in-depth interviews during the shopping trip our choices amongst the domestic and international brands were spread almost equally. 55% of our sample chose to buy an international brand as first choice and 53% of our sample chose to buy domestic products as a second choice.

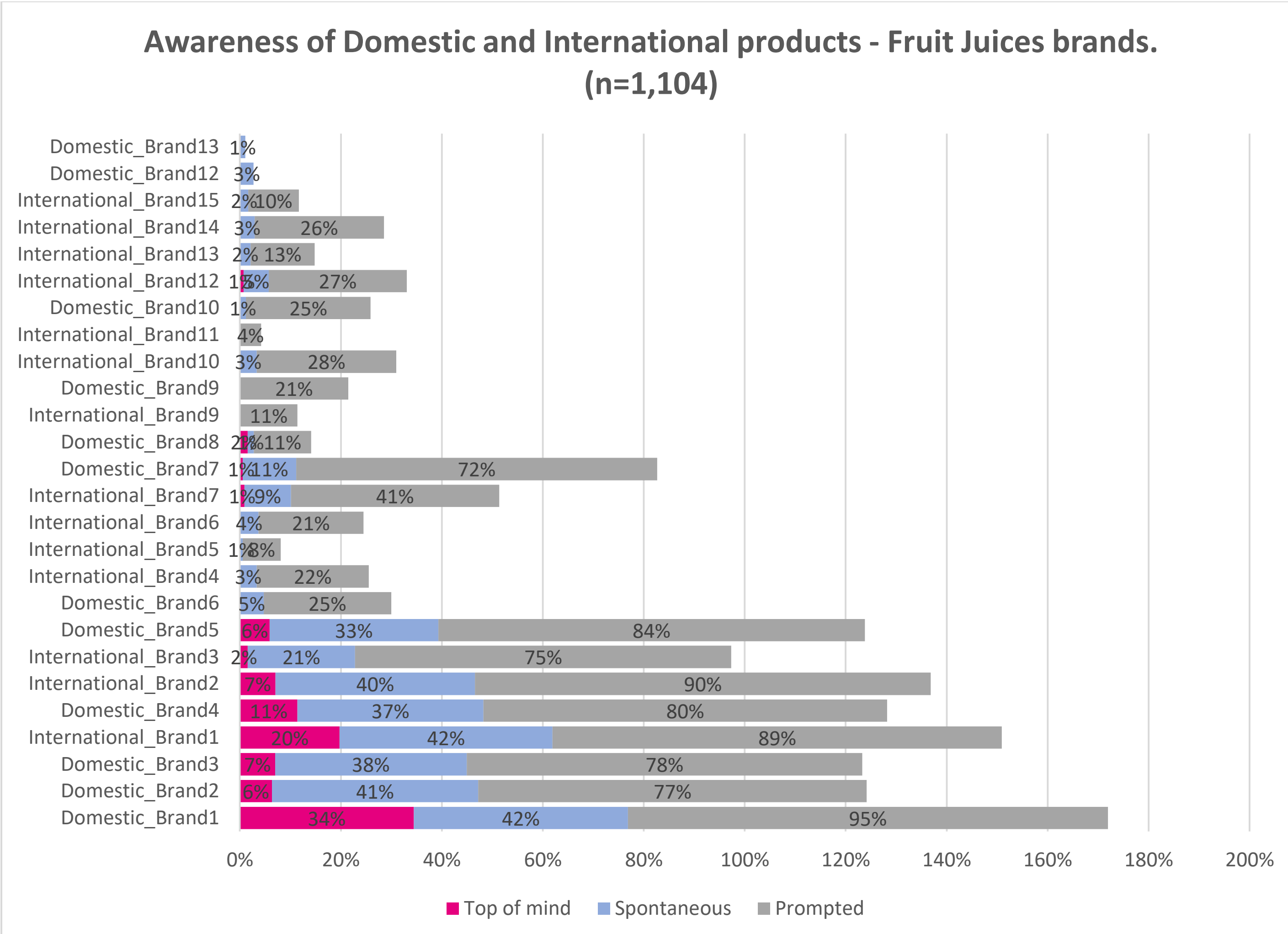
When looking at specific brands, domestic brands of justices are used most. Domestic brand 1 has the highest top of knowledge awareness at 30%, followed by International brand 1 at 20%

Spontaneous and prompted awareness of Juices brands is quite high compared to other categories.

With that being said 100% of Kosovo's population are aware of most famous domestic fruit juice brands. Percentage of total awareness of famous international products is 99%.
However during the in depth interviews the respondents expressed their dissatisfaction with a lot of domestic fruit juice producers.
Majority of consumers of domestic fruit juice producers stated that they purchase those brands just because of the low prices, and if they would have more available funds they would switch to international fruit juice brands immediately.
Some also expressed that domestic fruit juice brands are not consistent in their production.



Graph 33: Please tell me which brand of fruit juiced sold in stores comes to your mind first?
What other brands of fruit juices do you remember?
Have you ever heard of?



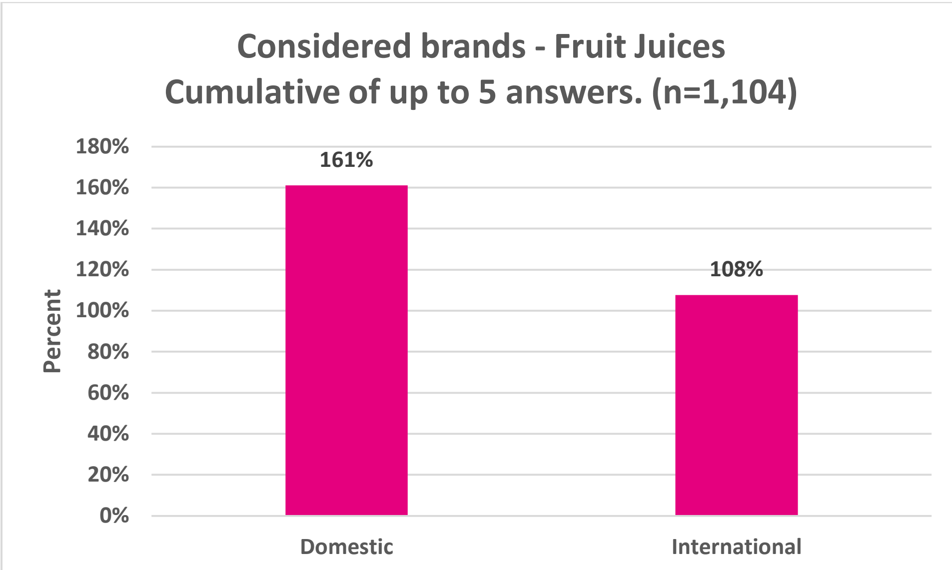
Graph 34: Please tell me which brand of fruit juiced sold in stores comes to your mind first?
What other brands of fruit juices do you remember?
Have you ever heard of?

In order to understand better the attitudes toward domestic brands, we have asked our sample to put themselves into the position of thinking of what brand would they buy if they went to the store today to buy a fruit juice.
Our research reveals that 161% (cumulative of up to 5 brands) of the population, if they went to the store today they would consider buying a domestic brand, whereas 108% (cumulative of up to 5 brands) of the Kosovo's population declared that they would consider buying an international brand.

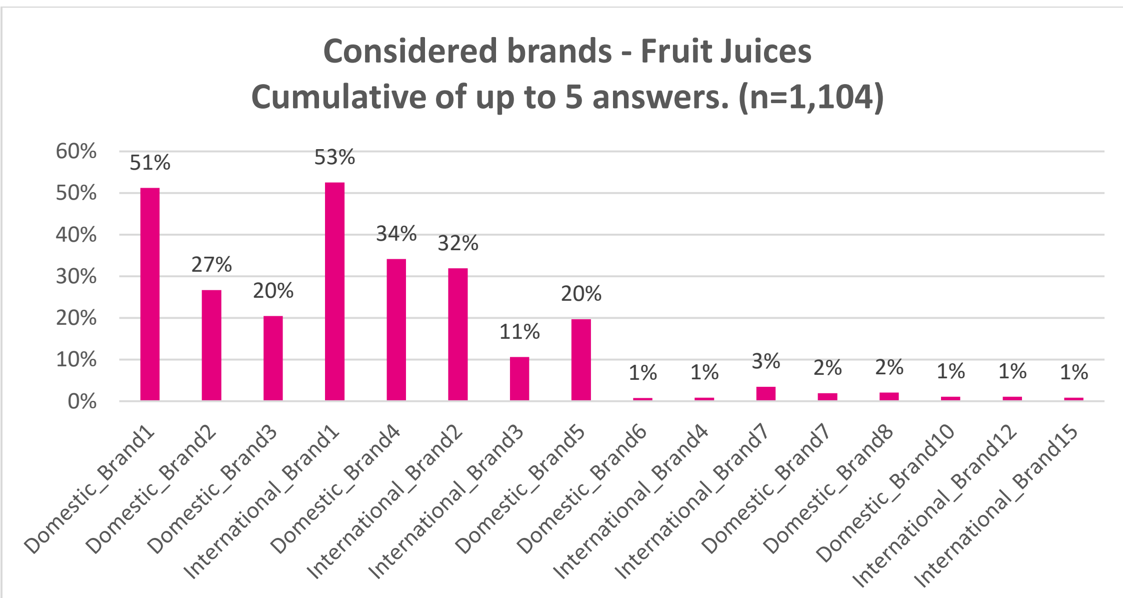
During the simulated shopping trip decisions were spread in half, half of our respondents bought domestic whereas the other half bought international products.

When looking at brands to be considered for buying, International brand 1 is at 53% followed by Domestic brand 1 at 51%.

Other domestic brands are also mentioned by a high percentage of Kosovo citizens



Graph 35: Which brands of fruit juices would you consider buying if you went out for shopping today?



Graph 36: Which brands of fruit juices would you consider buying if you went out for shopping today?

5.2 Focus and consciousness of products, intuitive user experiences using eye tracker: Fruit Juice

In terms of fruit juices if we look at the user's intention we notice that the concentration is on domestic products, however not considerably more than domestic products.

Respondents did spend more time on the shelf itself because the choices were bigger however also physically they moved more and they eyes were wondering more from one product to another.

And if we look at the shelf of international juices, popular brands were looked at first, and particularly people were concentrated to check out the variety of flavors of the popular international brands.

One also must mention that the range of choices is much bigger in the fruit juice section, that most probably because out of the five categories of interest, fruit juices is the product that is used most, and in a regular basis.
Because it is a product that is used often people seem to check the prices of this product more carefully, which is also visible in the picture below as the heat maps are green on the prices in a lot of products.

Brand choices of fruit juices depends a lot on the income of households. Households with higher income prefer international brands whereas households with lower incomes purchase brands which are cheaper and are usually domestic products.
One respondent mention that if she had more available budget she would purchase one of the renown international brands which are quite a few in Kosovo.

Picture 7: Clean shelf picture: Fruit juices

Picture 8: Heat map: Fruit juices

Picture 9: Clean shelf picture: Fruit juices

Picture 10: Heat map: Fruit juices

5.3 Frequency of usage

We have also asked our sample about their frequency of usage of Fruit Juices. Kosovo's citizens declared that they use domestic products considerably more compared to international products in terms of fruit juices.

Fruit juices are used more, 14% of the respondents declared that they ever used a domestic brand of fruit juice last month, whereas 7% declared that they used an international brand of fruit juice last month.

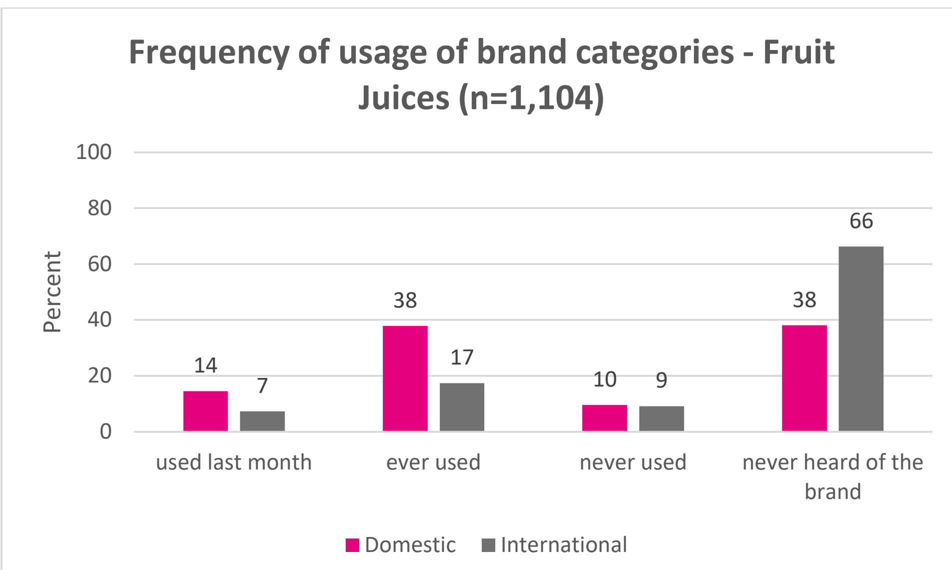
Our sample namely, 38% of Kosovo's population declared that they ever used a domestic fruit juice whereas declared usage and international ketchup product is only 17%.

Only 10% of the population never used a domestic fruit juices and 9% never used an international product.

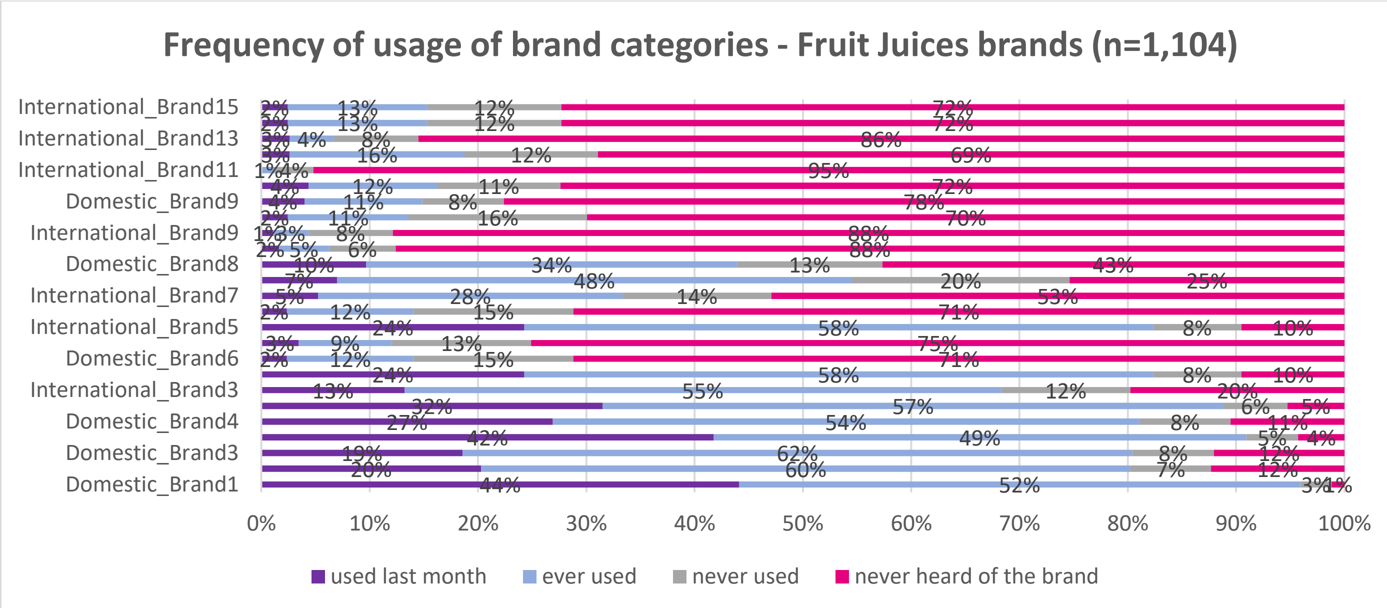
Our sample namely, 38% of them declared that they never heard of the most popular domestic brands

Our sample namely, 66% of them declared that they never heard of the most popular international brands.

Data in terms of usage are similar to preference. Domestic brands are used most often.

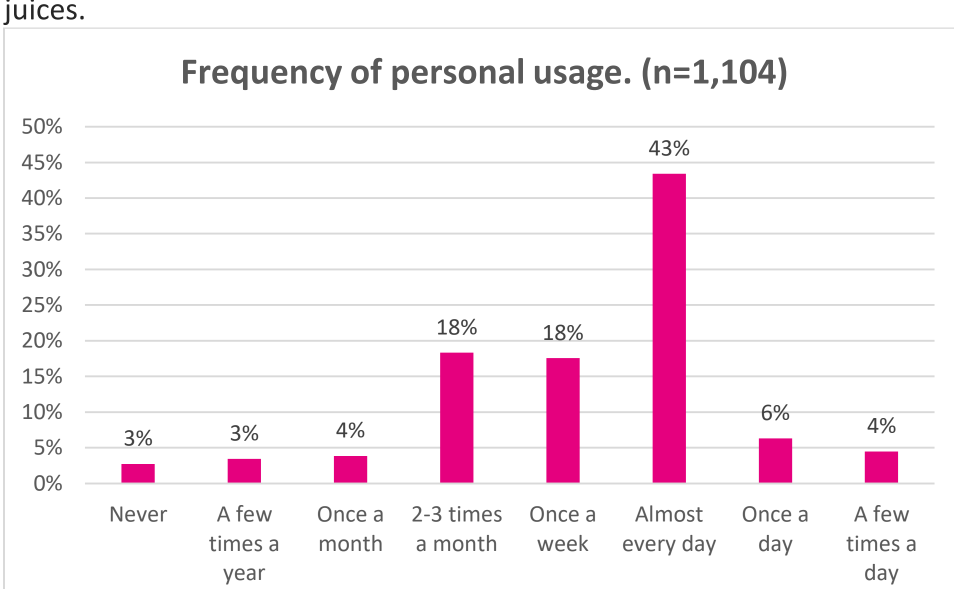


Graph 37: For these brands, please tell me...: Fruit juices



Graph 38: For these brands, please tell me...: Fruit juices

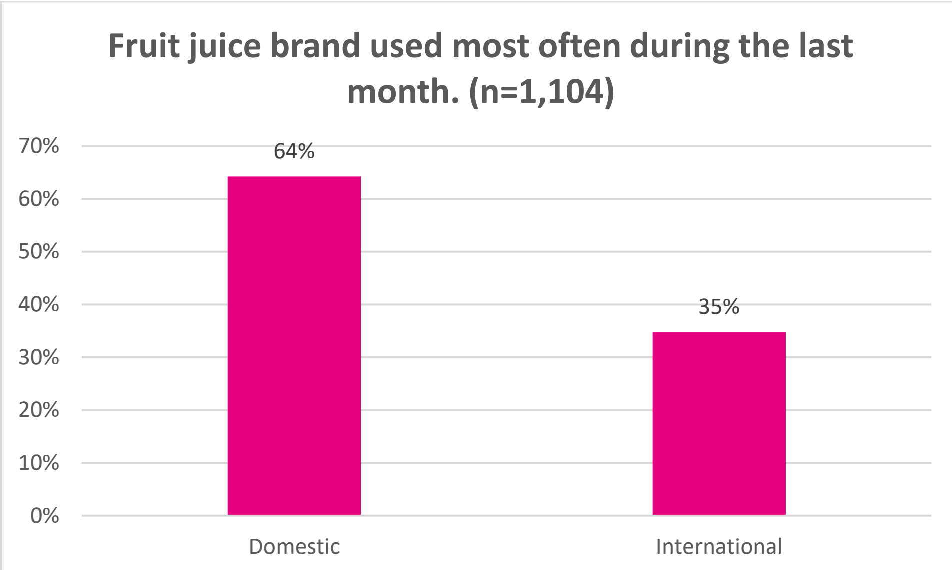
Whereas in terms of frequency of usage of fruit juices, the behaviors of Kosovo's citizens seem to be quite diverse. 4% consumes ketchup few times a day, 6% of our sample consumes it every day, 43% almost every day, 18% once a week, 18% 2-3 times a month 6 once a month, 4% consume it once a month, 3% few times a year and 3% of the sample never consumes fruit juices.



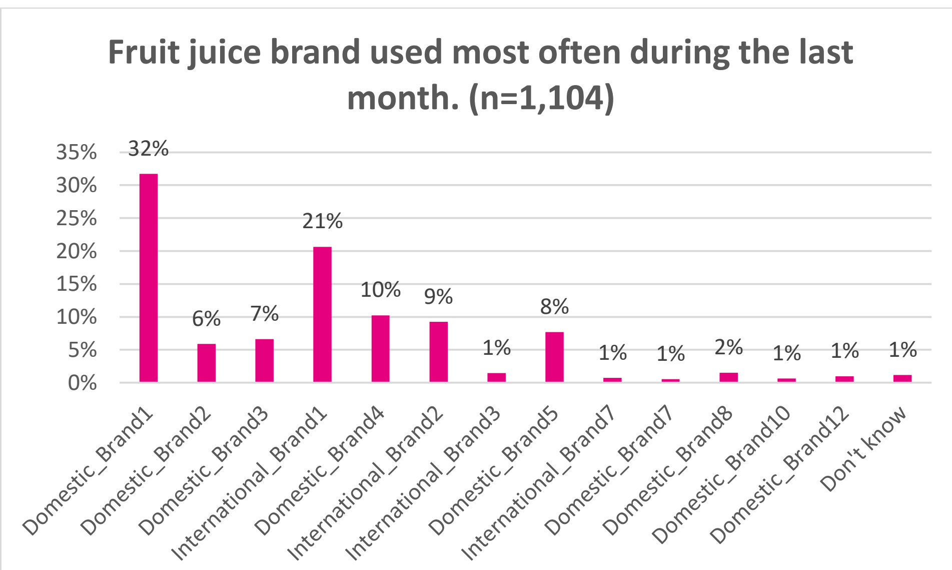
Graph 39: How often do you personally use fruit juices?

Our sample have been asked to declare their usage of fruit juice brand during last month.
With that being said, 64% of the population declared that they used a domestic Ajvar brand whereas 35% declared that they used an international Fruit juice brand.

Kosovo's population declared that they used Domestic brand 1 most. Almost one third of the population declared that used Domestic brand 1 during the last month whereas International brand 1 is used considerably less last month, by 21% of the population



Graph 40: Tell me which brand of fruit juices have you used most during the last month?



Graph 41: Tell me which brand of fruit juices have you used most during the last month?

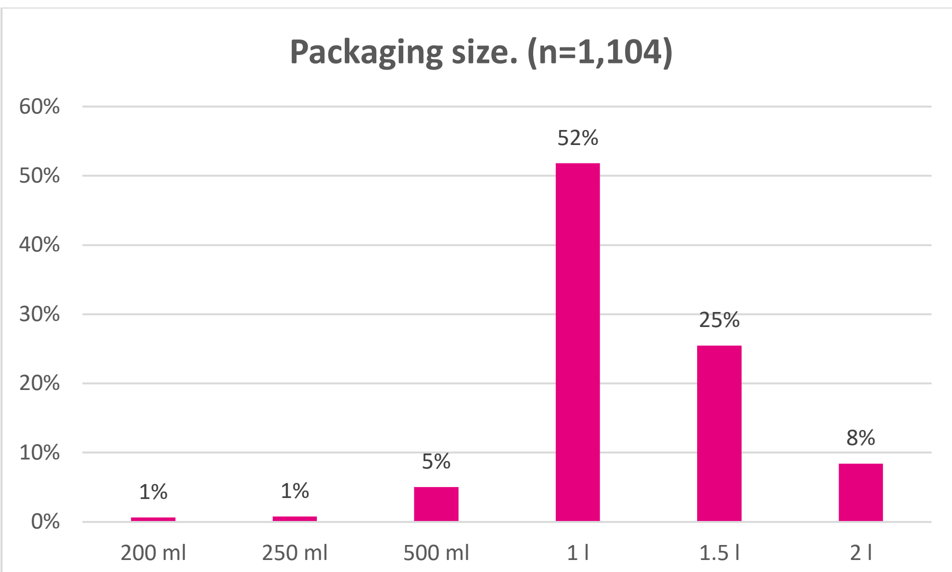
5.4 Packaging

Whereas in terms of the size of the packaging of juices, although there are quite a lot of variations the most popular size without a doubt is 1 l, followed by 1.5l

During the shopping trip, almost all participants choose 1l however bigger households also tend to buy 2l packaging for Fruit Juices.

Something that strikes out during the in depth interview was the fact that the design of the juices was discussed more compared to the other categories.
Kosovo citizens seem to prefer to see pictures of fresh fruit on their packaging, and their purchase choice seem to be highly affected by the visuals on the packaging of the fruit juices

Also there are a handful of big international brands present for a decade in Kosovo which thorough the years with a lot of marketing have acquired a big customer base which makes it difficult for domestic products to find their way to Kosovars shopping baskets.



Graph 42: When buying fruit juices, what is the size of the packaging you buy most often?

6. Jam

6.1 Overall product awareness and usage

Awareness of brands of Jams in general is average. Namely 15% of Kosovo's population were able to name a domestic brand, whereas 16% of Kosovo's population was able to name an international jam brand on top of their mind. In terms of spontaneous and prompted awareness there is no difference amongst domestic and international brands

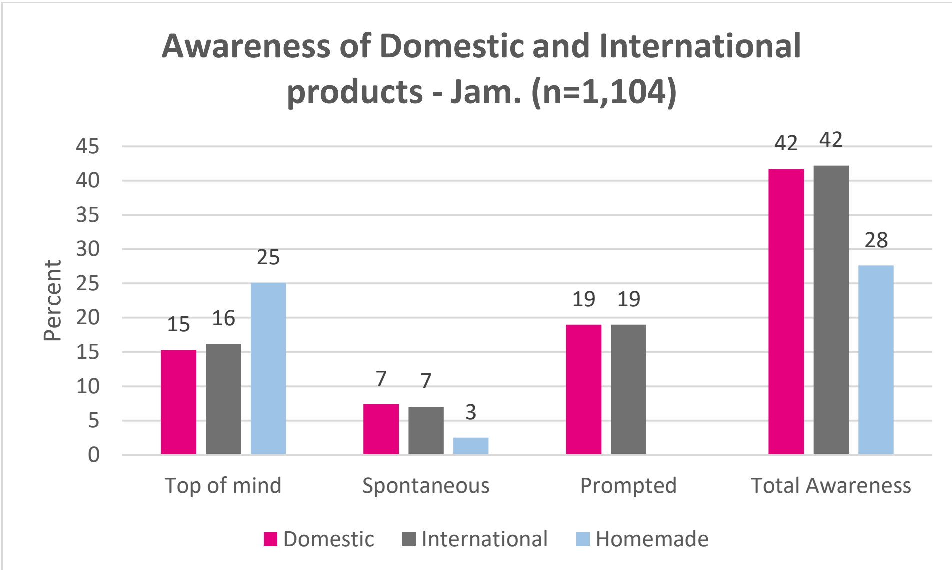
However the in-depth interviews during the shopping trip our choices amongst the domestic and international brands were spread almost equally. 60% of our sample chose to buy a domestic brand as first choice and 50% of our sample chose to buy domestic products as a second choice.

When looking at specific brands, International brand 4 prevail in terms of top of mind knowledge, followed by Domestic brand 1

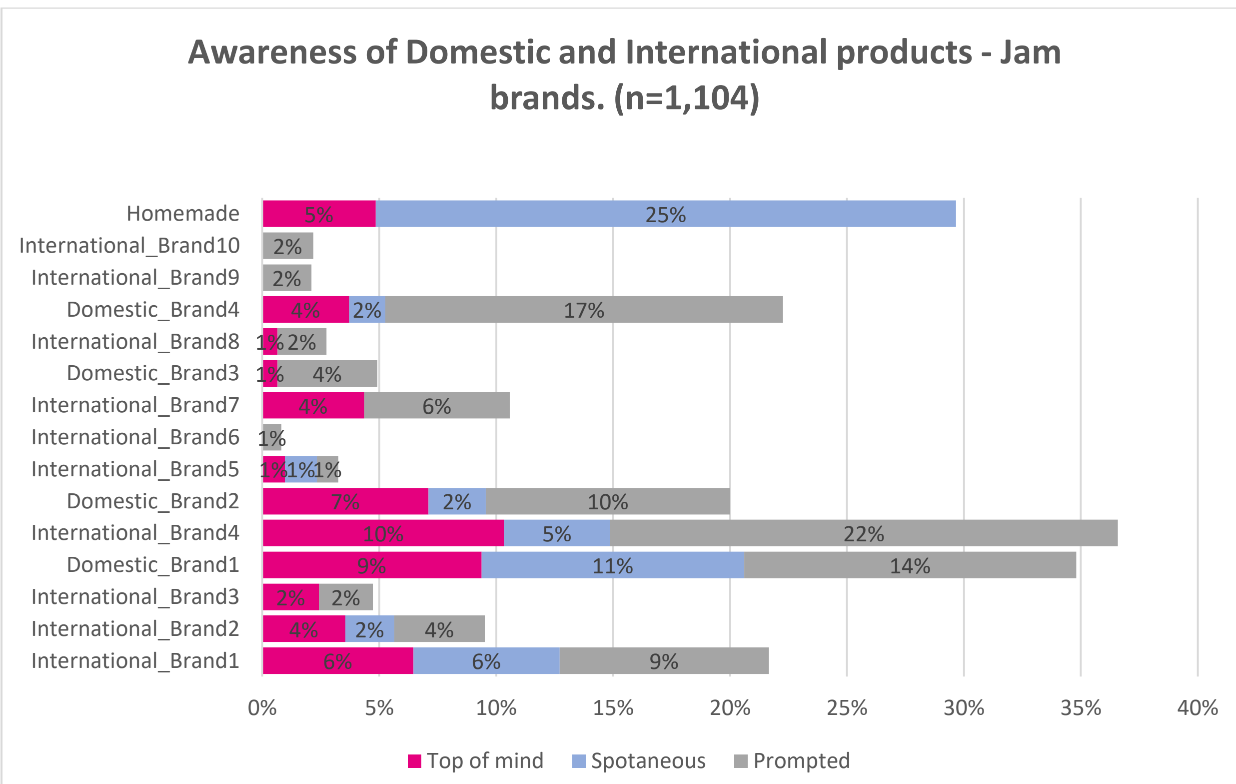
Whereas in terms of spontaneous awareness Domestic Brand 1 is the most recognized one followed by International brand 1 and 4.

With that being said 42% of Kosovo's population are aware of most famous jam fruit juice brands. Percentage of total awareness of famous international products is the same as that of domestic brands
However during the in depth interviews we understood that jam is the least used product from all five categories of interest.

As data from the general population survey also reveals people are fund of making their own jam in cases when they want to consume it, however it is not a product that is used consequently in a lot of Kosovar households.



Graph 43: Please tell me which brand of jam/confiture/compot sold in stores comes to your mind first?
What other brands of jam/confiture/compote do you remember?
Have you ever heard of?

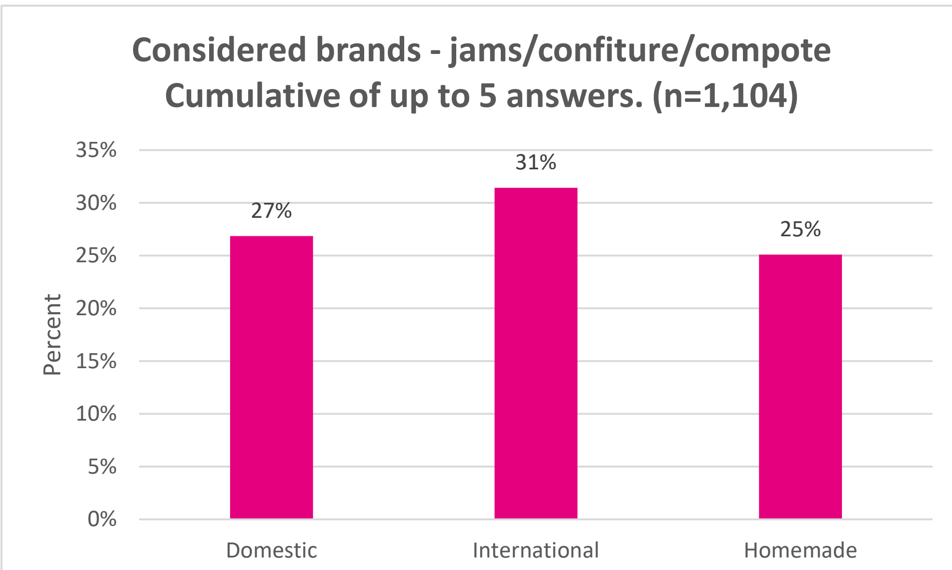


Graph 44: Please tell me which brand of jam/confiture/compot sold in stores comes to your mind first?
What other brands of jam/confiture/compote do you remember?
Have you ever heard of?

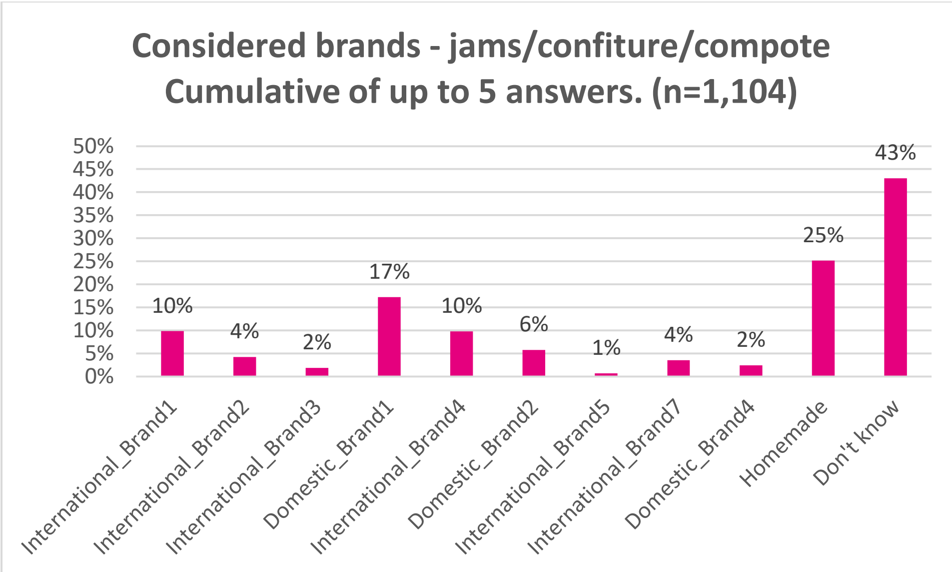
In order to understand better the attitudes toward domestic brands, we have asked our sample to put themselves into the position of thinking of what brand would they buy if they went to the store today to buy a Jam.
The research reveals that 27% of the population if they went to the store today they would consider buying a domestic brand, whereas 31% of the Kosovo's population declared that they would consider buying an international brand.

These results are also similar to the choices of the respondents of the simulated shopping trip where international brands were preferred slightly more compared to domestic products.

When looking at brands Domestic brand 1 is the brand people would consider buying if they went to the store and 10% of the population would consider buying International brand 1



Graph 45: Which brands of jam/confiture/compote would you consider buying if you went out for shopping today?



Graph 46: Which brands of jam/confiture/compote would you consider buying if you went out for shopping today?

6.2 Focus and consciousness of products, intuitive user experiences using eye tracker: Jam

Jam/confiture/compote are not used a lot by Kosovo citizens, the qualitative research also reveals. On average they purchase no more than 1 jar of jam monthly.
Respondents wondered around because they were more interested to look out there since lots of them did not consume it very much, and if they do they declared that they normally choose a or international brand that they know, and that they gotten to know from other categories.

Because most of the respondents were only sporadic users of the category a lot of products caught their attention. It is visible that domestic and international brands have similar share in this category, with domestic being slightly bigger.

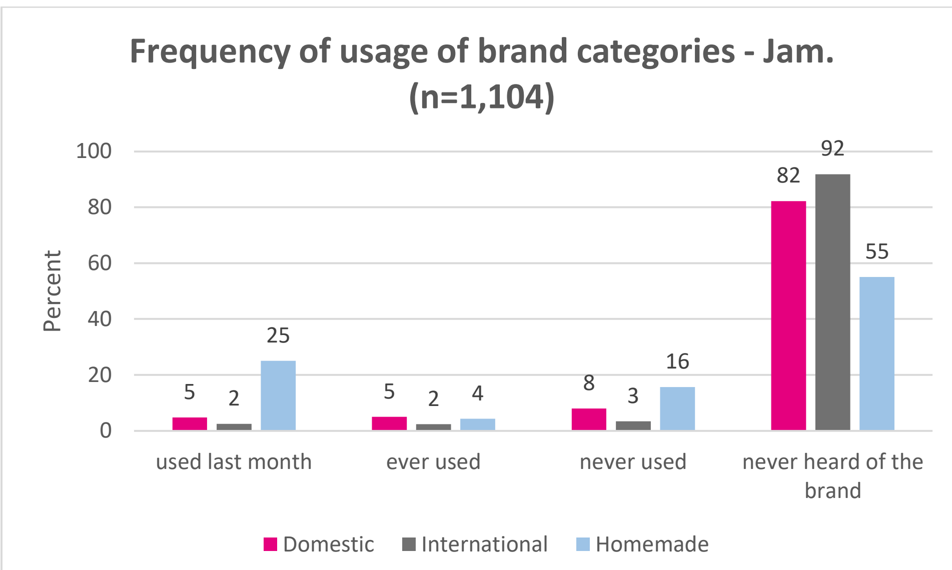
Brands who possess smaller packaging were also dedicated considerable time because respondents declared that they tend to buy jams in small jars because they consume it less, however there were no domestic brands offering jams in small jars.

Nevertheless there are exceptions to the general behavior. One respondent coming from a bigger family with low household income declared that they buy a 2.5kg jam jar and they consume it mainly in the mornings.

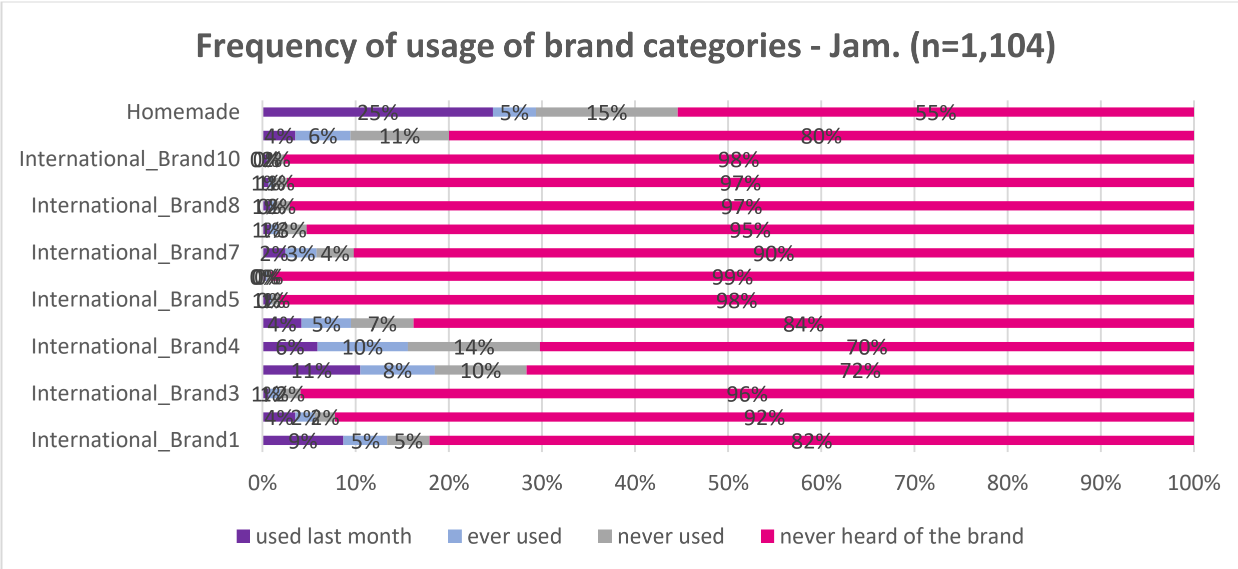
Picture 11&12: Clean shelf picture and Heat map: Jam

6.3 Frequency of usage

We have also asked our sample about their frequency of usage of Jam. Usage of Jam in general is very low in Kosovo.
Kosovo's citizens declared that they use domestic products more compared to international products in terms of fruit juices.
A small amount, 5% of the respondents declared that they ever used a domestic brand of fruit juice last month, whereas 2% declared that they used an international brand of jam last month.
Only 5% of Kosovo's population declared that they ever used a domestic jam whereas declared usage and international ketchup product is only 2%.
Only 8% never used a domestic jam and 3% never used an international product.
Our sample namely, 82% of them declared that they never heard of the most popular domestic brands
Our sample namely, 92% of them declared that they never heard of the most popular international brands

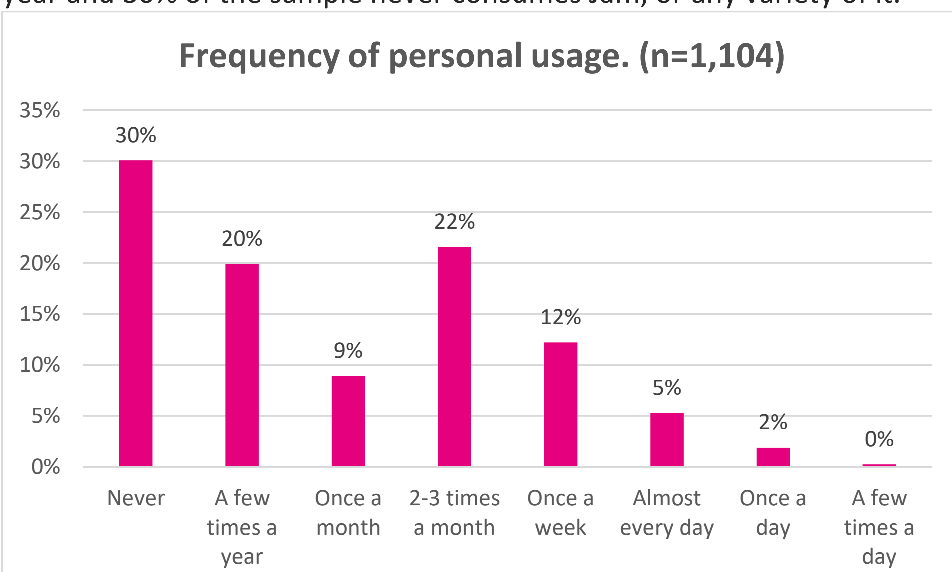


Graph 47: For these brands, please tell me...: Jam



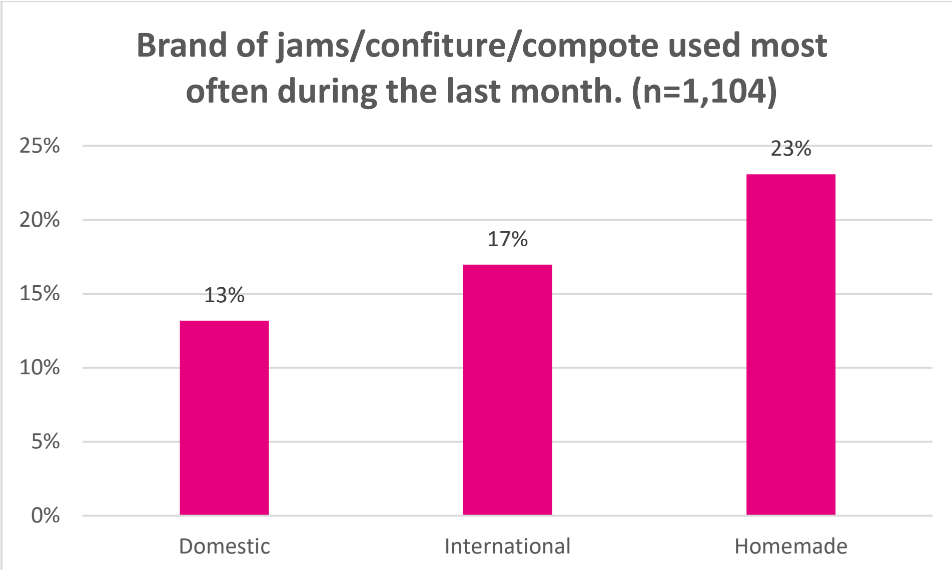
Graph 48: For these brands, please tell me...: Jam

Whereas in terms of frequency of usage of jam, the behaviors of Kosovo's citizens seem to be quite diverse. Only 2% of our sample consumes it every day, 5% almost every day, 12% once a week, 22% 2-3 times a month 6 once a month, 9% consume it once a month, 20% few times a year and 30% of the sample never consumes Jam, or any variety of it.

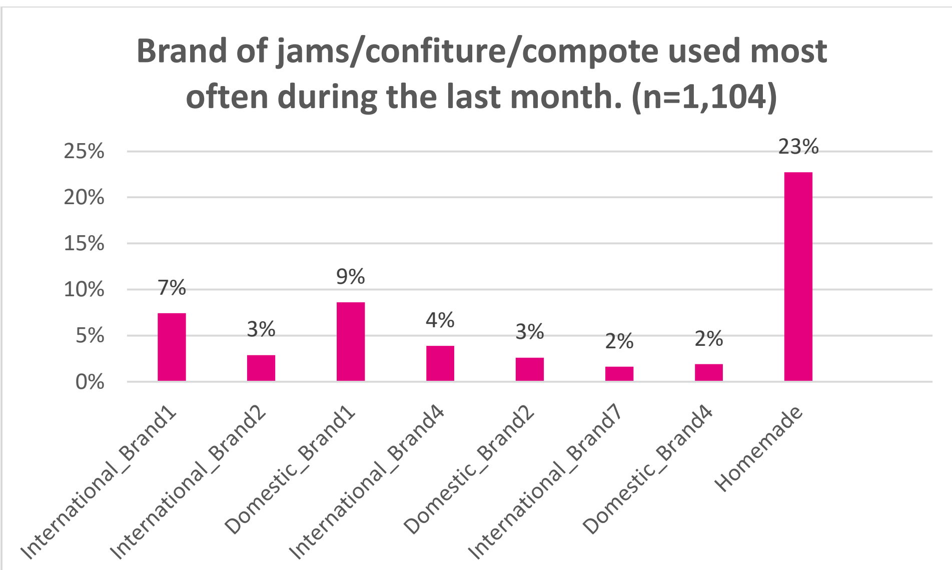


Graph 49: How often do you personally use Jam?

Our sample have been asked to declare their usage of Jam brand during last month.
With that being said, 13% of the population declared that they used a domestic Jam brand whereas 17% declared that they used an international Jam brand.
Home-made Ajvar seems to be quite popular amongst Kosovo's citizens as 23% of them declared that they used a home-made Jam last month.
Kosovo's population declared that they used Domestic brand 1 and International 1 most during last month.



Graph 50: Tell me which brand of jam have you used most during the last month?

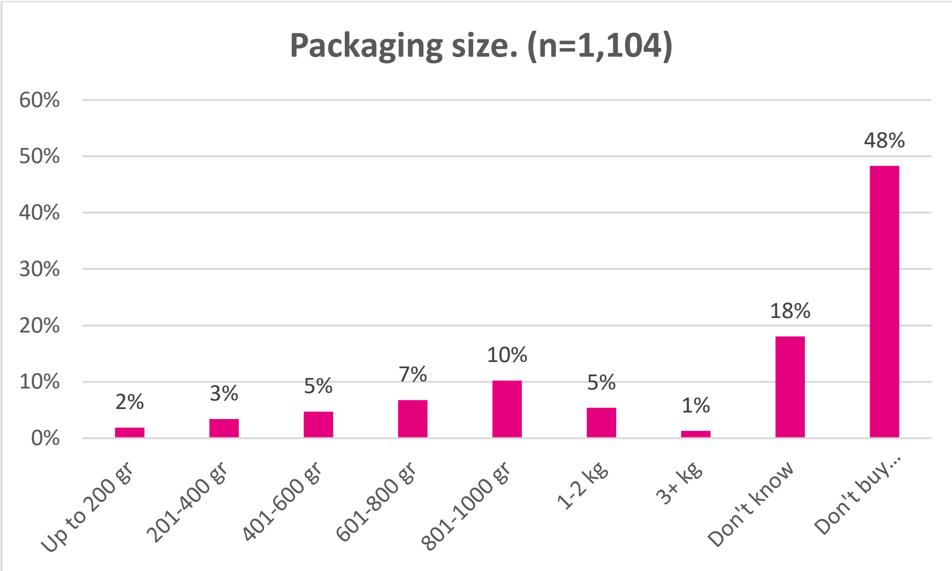


Graph 51: Tell me which brand of jam have you used most during the last month?

6.4 Packaging

Whereas in terms of the size of the packaging of pickled, there are many variations the most popular size is 801-1000 gr, followed by smaller packaging, however the preferences are very wide spread. Almost half of Kosovo’s population expressed that they do not buy jam products and 18% of them did not know what size of packaging they buy the jam.

Also during the shopping trip people had difficulties choosing their jam compared to other categories, mainly because they consume it very rare, and that mainly in the mornings.



Graph 52: When buying jams, what is the size of the packaging you buy most often?

Annex 1 - Quantitative Questionnaire

"Now lets talk about the consumption of some food products."

A-1a. **Please tell me which brand of ajvar sold in stores comes to your mind first?** DO NOT READ OUT LOUD. ONLY ONE ANSWER

A-1b. **What other brands of ajvar do you remember?**DO NOT READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

(ASK ONLY ABOUT THE BRANDS THAT THE RESPONDENT DID NOT MENTION IN QUESTIONS A-1a AND A-1b)

A-1c. **Have you ever heard of:** PLEASE READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

Brands	A-1a Mentioned first	A-1b Others mentioned	*If not mentioned spontaniesly*	A-1c Have you ever heard ...
Abi	1.	1.	➔	1.
Vipro	2.	2.	➔	2.
Koral	3.	3.	➔	3.
Anna	4.	4.	➔	4.
Hina	5.	5.	➔	5.
Ask food	6.	6.	➔	6.
Bas ajvar	7.	7.	➔	7.
Riviera	8.	8.	➔	8.
Podravka	9.	9.	➔	9.
Perfetto	10.	10.	➔	10.
Visan	11.	11.	➔	11.
Mama's	12.	12.	➔	12.
Amarito	13.	13.	➔	13.
Amfisa	14.	14.	➔	14.
Ajvar Home-made (no brand)	15.	15.		NA
Other (please define) ____________	16.	16.		16.

A-2. **For the following brands, please tell me...** ONE ANSWER FOR EACH ROW

	Brands	used last month	ever used	never used	never heard of the brand
1.	Abi	1	2	3	4
2.	Vipro	1	2	3	4
3.	Koral	1	2	3	4
4.	Anna	1	2	3	4
5.	Hina	1	2	3	4
6.	Ask food	1	2	3	4
7.	Bas ajvar	1	2	3	4
8.	Riviera	1	2	3	4
9.	Podravka	1	2	3	4

10.	Perfetto	1	2	3	4
11.	Visan	1	2	3	4
12.	Mama’s	1	2	3	4
13.	Amarito	1	2	3	4
14.	Amfisa	1	2	3	4
15.	Ajvar Home-made (no brand)	1	2	3	4
16.	Other (please define) _________	1	2	3	4

A-3. Tell me which brand of Ajvar have you used most during the last month? ONLY ONE ANSWER

Abi	1.
Vipro	2.
Koral	3.
Anna	4.
Hina	5.
Ask food	6.
Bas ajvar	7.
Riviera	8.
Podravka	9.
Perfetto	10.
Visan	11.
Mama's	12.
Amarito	13.
Amfisa	14.
Ajvar Home-made (no brand)	15.
Other (please define) __________	16.

A-4. Which brands of ajvar would you consider buying if you went out for shopping today? DO NOT READ OUT LOUD. UP TO 5 ANSWERS

Abi	1.
Vipro	2.
Koral	3.
Anna	4.
Hina	5.
Ask food	6.
Bas ajvar	7.
Riviera	8.
Podravka	9.
Perfetto	10.
Visan	11.
Mama's	12.
Amarito	13.
Amfisa	14.
Ajvar Home-made (no brand)	15.
Other (please define) __________	16.

A-5. When buying ajvar, what is the size of the packaging you buy most often? ONLY ONE ANSWER

1. 100 gr
2. 300 gr
3. 350 gr
4. 550 gr
5. 720 gr
6. 2,250 gr
7. Other _______________
8. Don't know
9. Do not buy/make my own

A-6. How often do you personaly use Ajvar? ONLY ONE ANSWER

1. Never
2. A few times a year
3. Once a month
4. 2-3 times a month
5. Once a week
6. Almost every day
7. Once a day

B-1a. **Please tell me which brand of pickled products (pepers, cucumber, tomatos and other products, excluding dairy products) sold in stores comes to your mind first?** DO NOT READ OUT LOUD. ONLY ONE ANSWER

B-1b. **What other brands of pickled produts do you remember?** DO NOT READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

(ASK ONLY ABOUT THE BRANDS THAT THE RESPONDENT DID NOT MENTION IN QUESTIONS B-1a AND B-1b)

B-1c. **Have you ever heard of:** PLEASE READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

Brands	B-1a Mentioned first	B-1b Others mentioned	*If not mentioned spontaniesly*	B-1c Have you ever heard ...
Abi	1.	1.	→	1.
Koral	2.	2.	→	2.
Vipro	3.	3.	→	3.
Hina	4.	4.	→	4.
Green Product	5.	5.	→	5.
Ask food	6.	6.	→	6.
Riviera	7.	7.	→	7.
Bonum	8.	8.	→	8.
Delux	9.	9.	→	9.
Etlinger	10.	10.	→	10.
Kuhne	11.	11.	→	11.
Mama's	12.	12.	→	12.
Podravka	13.	13.	→	13.
Amarito	14.	14.	→	14.
Eurofood	15.	15.	→	15.
Vori	16.	16.	→	16.
Visan	17.	17.	→	17.
Sera	18.	18.	→	18.
Pickled products home-made (no brand)	19.	19.		19.
Other (please define) ____________	20.	20.		20.

B-2. **For the following brands, please tell me...** ONE ANSWER FOR EACH ROW

	Brands	used last month	ever used	never used	never heard of the brand
1.	Abi	1	2	3	4
2.	Koral	1	2	3	4
3.	Vipro	1	2	3	4
4.	Hina	1	2	3	4
5.	Green Product	1	2	3	4
6.	Ask food	1	2	3	4
7.	Riviera	1	2	3	4
8.	Bonum	1	2	3	4
9.	Delux	1	2	3	4

10.	Etlinger	1	2	3	4
11.	Kuhne	1	2	3	4
12.	Mama's	1	2	3	4
13.	Podravka	1	2	3	4
14.	Amarito	1	2	3	4
15.	Eurofood	1	2	3	4
16.	Vori	1	2	3	4
17.	Visan	1	2	3	4
18.	Sera	1	2	3	4
19.	Pickled products home-made (no brand)	1	2	3	4
20.	Other (please define) _________	1	2	3	4

B-3. **Tell me which brand of pickled products have you used most during the last month?** ONLY ONE ANSWER

Abi	1.
Koral	2.
Vipro	3.
Hina	4.
Green Product	5.
Ask food	6.
Riviera	7.
Bonum	8.
Delux	9.
Etlinger	10.
Kuhne	11.
Mama's	12.
Podravka	13.
Amarito	14.
Eurofood	15.
Vori	16.
Visan	17.
Sera	18.
Pickled products home-made (no brand)	19.
Other (please define) __________	20.

B-4. **Which brands of pickled products would you consider buying if you went out for shopping today?** DO NOT READ OUT LOUD. UP TO 5 ANSWERS

Abi	1.
Koral	2.
Vipro	3.
Hina	4.
Green Product	5.
Ask food	6.
Riviera	7.
Bonum	8.
Delux	9.
Etlinger	10.
Kuhne	11.
Mama's	12.
Podravka	13.
Amarito	14.
Eurofood	15.
Vori	16.
Visan	17.
Sera	18.
Pickled products home-made (no brand)	19.
Other (please define) __________	20.

B-5. When buying pickled products, what is the size of the packaging you buy most often? ONLY ONE ANSWER

1. 550 gr
2. 680 gr
3. 720 gr
4. 1,500 gr
5. 2,250 gr
6. 2,450 gr
7. 2,500 gr
8. Other _______________
9. Don’t know

B-6. How often do you personaly use pickled products? ONLY ONE ANSWER

8. Never
9. A few times a year
10. Once a month
11. 2-3 times a month
12. Once a week
13. Almost every day
14. Once a day

C-1a. **Please tell me which brand of ketchup sold in stores comes to your mind first?** DO NOT READ OUT LOUD. ONLY ONE ANSWER

C-1b. **What other brands of ketchup do you remember?**DO NOT READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

(ASK ONLY ABOUT THE BRANDS THAT THE RESPONDENT DID NOT MENTION IN QUESTIONS C-1a AND C-1b)

C-1c. **Have you ever heard of:** PLEASE READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

Brands	C-1a Mentioned first	C-1b Others mentioned	*If not mentioned spontaniesly*	C-1c Have you ever heard ...
Polimark	1.	1.	→	1.
Heinz	2.	2.	→	2.
Pinar	3.	3.	→	3.
Koral	4.	4.	→	4.
Eurofood	5.	5.	→	5.
Tomato	6.	6.	→	6.
Abi	7.	7.	→	7.
Itialianno	8.	8.	→	8.
Spak	9.	9.	→	9.
Buon Appetito	10.	10.	→	10.
Dijamant	11.	11.	→	11.
Perfetto	12.	12.	→	12.
Yamm Ketchup	13.	13.	→	13.
Other (Please define) ____________	14.	14.		14.

C-2. **For the following brands, please tell me...** ONE ANSWER FOR EACH ROW

	Brands	used last month	ever used	never used	never heard of the brand
1.	Polimark	1	2	3	4
2.	Heinz	1	2	3	4
3.	Pinar	1	2	3	4
4.	Koral	1	2	3	4
5.	Eurofood	1	2	3	4
6.	Tomato	1	2	3	4
7.	Abi	1	2	3	4
8.	Itialianno	1	2	3	4
9.	Spak	1	2	3	4
10.	Buon Appetito	1	2	3	4
11.	Dijamant	1	2	3	4
12.	Perfetto	1	2	3	4
13.	Yamm Ketchup	1	2	3	4
14.	Other (Please define) _________	1	2	3	4

C-3. Tell me which brand of ketchup have you used most during the last month? ONLY ONE ANSWER

Polimark	1.
Heinz	2.
Pinar	3.
Koral	4.
Eurofood	5.
Tomato	6.
Abi	7.
Itialianno	8.
Spak	9.
Buon Appetito	10.
Dijamant	11.
Perfetto	12.
Yamm Ketchup	13.
Other (Please define) ___________	14.

C-4. Which brands of ketchup would you consider buying if you went out for shopping today? DO NOT READ OUT LOUD. UP TO 5 ANSWERS

Polimark	1.
Heinz	2.
Pinar	3.
Koral	4.
Eurofood	5.
Tomato	6.
Abi	7.
Itialianno	8.
Spak	9.
Buon Appetito	10.
Dijamant	11.
Perfetto	12.
Yamm Ketchup	13.
Other (Please define) ___________	14.

C-5. When buying ketchup, what is the size of the packaging you buy most often? ONLY ONE ANSWER

1. 11 gr
2. 110 gr
3. 300 gr
4. 500 gr
5. 750 gr
6. 800 gr
7. 970 gr
8. 1000 gr
9. Other _______________
10. Don't know

C-6. How often do you personaly use Ketchup? ONLY ONE ANSWER

15. Never

16. A few times a year
17. Once a month
18. 2-3 times a month
19. Once a week
20. Almost every day
21. Once a day

D-1a. **Please tell me which brand of fruit juices sold in stores comes to your mind first?** DO NOT READ OUT LOUD. ONLY ONE ANSWER

D-1b. **What other brands of fruit juices do you remember?**DO NOT READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

(ASK ONLY ABOUT THE BRANDS THAT THE RESPONDENT DID NOT MENTION IN QUESTIONS D-1a AND D-1b)

D-1c. **Have you ever heard of:** PLEASE READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

Brands	D-1a Mentioned first	D-1b Others mentioned	*If not mentioned spontaniesly*	D-1c Have you ever heard ...
Tango	1.	1.	→	1.
Eks	2.	2.	→	2.
Dona	3.	3.	→	3.
Bravo (Rauch)	4.	4.	→	4.
Frutti	5.	5.	→	5.
Sola	6.	6.	→	6.
Fructal	7.	7.	→	7.
Jaffa	8.	8.	→	8.
Minex	9.	9.	→	9.
Juicy	10.	10.	→	10.
To	11.	11.	→	11.
Libella	12.	12.	→	12.
Pfanner	13.	13.	→	13.
Jaffa Champion	14.	14.	→	14.
Santal	15.	15.	→	15.
Eks	16.	16.	→	16.
Amita	17.	17.	→	17.
Eko	18.	18.	→	18.
Vitamina	19.	19.	→	19.
Rugove	20.	20.	→	20.
Frutomania	21.	21.	→	21.
Mam’s	22.	22.	→	22.
Happy Day (Rauch)	23.	23.	→	23.
Pinar	24.	24.	→	24.
Nectar	25.	25.	→	25.
Dimes	26.	26.	→	26.
Other (Please define) ____________	27.	27.		27.
Other (Please define) ____________	28.	28.		28.
Other (Please define) ____________	29.	29.		29.

D-2. For the following brands, please tell me... ONE ANSWER FOR EACH ROW

	Brands	used last month	ever used	never used	never heard of the brand
1.	Tango	1	2	3	4
2.	Eks	1	2	3	4
3.	Dona	1	2	3	4
4.	Bravo (Rauch)	1	2	3	4
5.	Frutti	1	2	3	4
6.	Sola	1	2	3	4
7.	Fructal	1	2	3	4
8.	Jaffa	1	2	3	4
9.	Minex	1	2	3	4
10.	Juicy	1	2	3	4
11.	To	1	2	3	4
12.	Libella	1	2	3	4
13.	Pfanner	1	2	3	4
14.	Jaffa Champion	1	2	3	4
15.	Santal	1	2	3	4
16.	Eks	1	2	3	4
17.	Amita	1	2	3	4
18.	Eko	1	2	3	4
19.	Vitamina	1	2	3	4
20.	Rugove	1	2	3	4
21.	Frutomania	1	2	3	4
22.	Mam's	1	2	3	4
23.	Happy Day (Rauch)	1	2	3	4
24.	Pinar	1	2	3	4
25.	Nectar	1	2	3	4
26.	Dimes	1	2	3	4
27.	Other (Please define) _________	1	2	3	4
28.	Other (Please define) _________	1	2	3	4
29.	Other (Please define) _________	1	2	3	4

D-3. Tell me which brand of fruit juice have you used most during the last month? ONLY ONE ANSWER

Tango	1.
Eks	2.
Dona	3.
Bravo (Rauch)	4.
Frutti	5.
Sola	6.
Fructal	7.
Jaffa	8.
Minex	9.
Juicy	10.
To	11.
Libella	12.
Pfanner	13.

Jaffa Champion	14.
Santal	15.
Eks	16.
Amita	17.
Eko	18.
Vitamina	19.
Rugove	20.
Frutomania	21.
Mam's	22.
Happy Day (Rauch)	23.
Pinar	24.
Nectar	25.
Dimes	26.
Other (Please define) ____________	27.

D-4. **Which brands of fruit juice would you consider buying if you went out for shopping today?** DO NOT READ OUT LOUD. UP TO 5 ANSWERS

Tango	1.
Eks	2.
Dona	3.
Bravo (Rauch)	4.
Frutti	5.
Sola	6.
Fructal	7.
Jaffa	8.
Minex	9.
Juicy	10.
To	11.
Libella	12.
Pfanner	13.
Jaffa Champion	14.
Santal	15.
Eks	16.
Amita	17.
Eko	18.
Vitamina	19.
Rugove	20.
Frutomania	21.
Mam's	22.
Happy Day (Rauch)	23.
Pinar	24.
Nectar	25.
Dimes	26.
Other (Please define) ____________	27.
Other (Please define) ____________	28.
Other (Please define) ____________	29.

D-5. **When buying fruit juices, what is the size of the packaging you buy most often?** ONLY ONE ANSWER

1. 20 ml
2. 25 ml
3. 200 ml
4. 250 ml
5. 330 ml
6. 500 ml
7. 1 liter
8. 1.5 liter
9. 2 liter
10. 2.5 liter
11. Other ______________
12. Don’t know

D-6. How often do you personaly use fruit juices? ONLY ONE ANSWER

22. Never
23. A few times a year
24. Once a month
25. 2-3 times a month
26. Once a week
27. Almost every day
28. Once a day

'Now let's talk a little about the category of Jam/confirture/compot and similar variations'

E-1a. Please tell me which brand of Jam/confirture/compot sold in stores comes to your mind first? DO NOT READ OUT LOUD. ONLY ONE ANSWER

E-1b. What other brands of Jam/confirture/compot do you remember?DO NOT READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

(ASK ONLY ABOUT THE BRANDS THAT THE RESPONDENT DID NOT MENTION IN QUESTIONS E-1a AND E-1b)

E-1c. Have you ever heard of: PLEASE READ OUT LOUD. MULTIPLE ANSWERS POSSIBLE

Brands	E-1a Mentioned first	E-1b Others mentioned	*If not mentioned spontaniesly*	E-1c Have you ever heard ...
Phanner	1.	1.	➔	1.
Mettin	2.	2.	➔	2.
Sidnej	3.	3.	➔	3.
Progres Abi	4.	4.	➔	4.
Podravka	5.	5.	➔	5.
Euro food	6.	6.	➔	6.
Elnart	7.	7.	➔	7.
Darbo	8.	8.	➔	8.
Nektar	9.	9.	➔	9.
Ask food	10.	10.	➔	10.
Vipro	11.	11.	➔	11.
Amarilto	12.	12.	➔	12.
Koral	13.	13.	➔	13.
Execlsior	14.	14.	➔	14.
Jam/confiture/compote home-made (no brand)	15.	15.		NA
Other (Please define) ____________	16.	16.		16.

E-2. For the following brands, please tell me... ONE ANSWER FOR EACH ROW

	Brands	used last month	ever used	never used	never heard of the brand
1.	Phanner	1	2	3	4
2.	Mettin	1	2	3	4
3.	Sidnej	1	2	3	4
4.	Progres Abi	1	2	3	4
5.	Podravka	1	2	3	4
6.	Euro food	1	2	3	4
7.	Elnart	1	2	3	4
8.	Darbo	1	2	3	4
9.	Nektar	1	2	3	4
10.	Ask food	1	2	3	4
11.	Vipro	1	2	3	4

12.	Amarilto	1	2	3	4
13.	Koral	1	2	3	4
14.	Execlsior	1	2	3	4
15.	Jam/confiture/compote home-made (no brand)	1	2	3	4
16.	Other (Please define) _________	1	2	3	4

E-3. **Tell me which brand of Jam/confirture/compot have you used most during the last month?** ONLY ONE ANSWER

Phanner	1.
Mettin	2.
Sidnej	3.
Progres Abi	4.
Podravka	5.
Euro food	6.
Elnart	7.
Darbo	8.
Nektar	9.
Ask food	10.
Vipro	11.
Amarilto	12.
Koral	13.
Execlsior	14.
Jam/confiture/compote home-made (no brand)	15
Other (Please define) ____________	16

E-4. **Which brands of jam/confiture/compote would you consider buying if you went out for shopping today?** DO NOT READ OUT LOUD. UP TO 5 ANSWERS

Phanner	1.
Mettin	2.
Sidnej	3.
Progres Abi	4.
Podravka	5.
Euro food	6.
Elnart	7.
Darbo	8.
Nektar	9.
Ask food	10.
Vipro	11.
Amarilto	12.
Koral	13.
Execlsior	14.
Jam/confiture/compote home-made (no brand))	15
Other (Please define) ____________	16

E-5. **When buying Jam/confiture/compote what is the size of the packaging you buy most often?** ONLY ONE ANSWER

1. Up to 200 gr
2. 201-400 gr
3. 401-600 gr
4. 601-800 gr
5. 801-1000 gr
6. 1-2 kg

7. 3+ kg
8. Do not know
9. I do not buy Jam/confiture/compote

E-6. How often do you personaly use Jam/confiture/compote? ONLY ONE ANSWER

29. Never
30. A few times a year
31. Once a month
32. 2-3 times a month
33. Once a week
34. Almost every day
35. Once a day
36. A few times a day

E-7. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements. READ OUD LOUD OPTIONS 1-5

	Strongly agree	**Somewhat agree**	**Somewhat disagree**	**Strongly disagree**	**Do not know**
1. I would rather buy Kosovar products even if they are more expensive	1	2	3	4	9
2. I would rather buy Kosovar products even if they are more expensive	1	2	3	4	9
3. Products in glass packaging are healthier	1	2	3	4	9
4. I always prefer products of Kosovar producers	1	2	3	4	9
5. I always try to buy natural products	1	2	3	4	9

Annex 2 – Guide for the in-depth interviews

Selection Criteria

1. Does the shopper have eyeglasses — *1. Yes (Terminate)*

2. No (Continue)

2. What is your purpose of the visit to this mall today?

1. Shopping for groceries	*1. Yes*	*2. No*
2. Shopping for clothes	*1. Yes*	*2. No*
3. Other	*1. Yes*	*2. No*

(If shopping for grocery is not mentioned, terminate the interview)

How often do you personally shop for the following categories?

	Often	*Sometimes*	*Never*
1. Jam/comfiture/compote	*1*	*2*	*3*
2. Ketchup	*1*	*2*	*3*
3. Fruit beverages	*1*	*2*	*3*
4. Ajvar (or variations of ajvar)	*1*	*2*	*3*
5. Pickled products	*1*	*2*	*3*

(If 'never' in any category terminate the interview)

Warm up before the store - 5 min

- Shoppers intro- age, household members
- *How you would describe this kind of shopping?*

Shopnography (with video-glasses)

Recap of shopping behaviour (for each category)

- ***[Note to moderator]*** Let the respondent select the item then as the questions while still in front of the shelf:
- So what are your impressions so far?
- What stands out instantly in this SSD section? What grabs your attention? Products? Displays? Branding/Signage? What else?
- Which products are less prominent?
- Why did you chose that particular product? Are you interested in that particular product or brand? Why?
- Why that particular size?
- Why that particular package?
- What are the strengths and weakness of this brand?
- Is there any brand that you would never consider buying? How come?
- How has your choice changed in time (are there brands added or excluded)? How come?
- ***[Note to moderator]*** *If not mentioned spontaneously probe:* what about the origin of the product? How important is this factor to you? Why? What do you look for?
- ***[Note to moderator]*** *Please make sure you* **DO NOT reveal the client's interest in domestic brands** *any moment.*
  - How do you decide to buy this particular type of product?
  - How often do you buy it usually? In what situations?
  - Do you pay attention to promotions when it comes to this particular product?
  - Why do you buy this particular brand? Which is your preferred brand/ flavor? Why?
  - What is the difference between your preferred brand and others when it comes to:
    - Pack sizes
    - Price
    - Quality
  - How did you find your brand?
  - Which is the main competitor to your brand? Why do you think so?

- Is it easy to find your brand in the shop usually? Is it visible enough?
- Do you pay attention to your favorite brand promotions?
- What could be the reasons to replace your favorite brand with other?
- Ok let's imagine that the product you have just bought disappears from the market. Now let's choose another product from the shelf. But now, please explain all your thoughts while choosing.
- **[Note to moderator]** Let the respondent make a second selection and then proceed. *Note what the respondent engages with first. Does he/she navigate the shelf first finding the SSD at head height or other?*

§§§ **[Note to moderator**] *Does the respondent walk along the shelf to get an overview of the offer, or does he/she go straight towards certain products or brand? What seems to drive his/her movement in the CATEGORY section (e.g. for better visibility of the product, specific displaying method – products on promotion, product placed at …) If others, what are they? Why?*

- Now that you have shopped a few products, what do you think of the way the products are laid out?
- Is it easy for you to understand the logic of shelf arrangement? Why? Why not?
- If you were a store manager, how would you organize the products to make them easier to understand and shop? Tell me any ideas you have in mind.
- Is there any particular way of presentation that captures your interest? Why?
- Do any labels, marketing materials, etc. have any influence over the decisions you make? If yes, in what sense? If not, why not?
- What is the most important information to be found on the shelf/ products/ labels/ promotional materials/ etc.?
- Does any brand/ flavor stand out in particular? Which one and why?
- Do you look at a different brand because of the layout/arrangement of the SSD section?
- Is there anything about the shelf that makes shopping difficult?
- Are the products easy to reach and look at?
- How important is comparing products in the CATEGORY section? Do you already have criteria/ideas set in your mind (even before visiting stores) how to compare and make the best choice? Or, do you need to make direct comparison in store?
- How do you think we can make product comparison easier and immediate?
- What is the next thing you take into consideration? How come?
- Is there anything in the store that helped you to go through your decision-making when looking for something (beyond habitual)? How it hinders you form taking a decision?
- What are the factors that influence on your decision making in the store? What is the most impactful factor?

- Is there a gap between what you expected and what you actually experienced in store? If yes, what and why?

- What would help you more to take a decision right now? How come?

§§§ ***[Note to moderator]*** *If not mentioned spontaneously, make sure you understand the respondent's key buying criteria and what he/she is trying to compare as quickly and easily as possible to make his/her decision:*
[Note to moderator] *If price is mentioned as one of the key factors, try to investigate deeper (don't accept the first answer) and probe further for the meaning of price (and or promotion).*

Annex 3 – Heat maps

Heat Maps 1 (13.12.2017-16.01.2018)

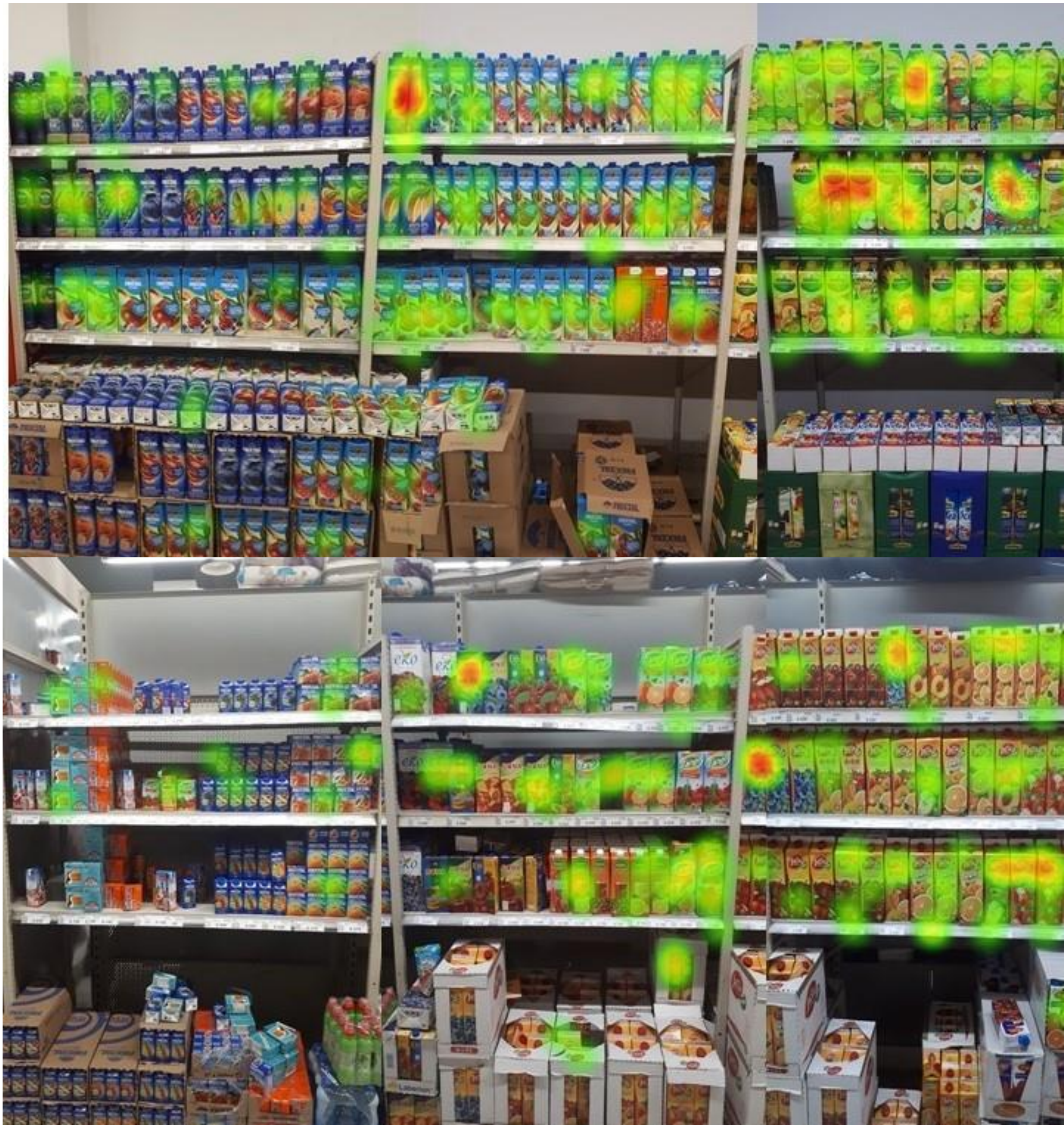

ZER

TOMATO KETCHUP
POLIMARK
Keçap
PIZZA
DJEGES
Ketchup
Acili Ketçap
0.73€
0.83€
0.79€
0.75€
0.95€
1.45€
0.93€


IceTea
bravo


VIPPO
0.95€
0.73€
0.73€
1.39€
1.35€
2.25€
2.25€
1.99€
1.75€
1.79€
1.15€
1.19€
AJVER
AJVER
Ajvar
AJVAR
0.95€
3.49€
1.49€
1.89€
1.75€
1.95€
3.99€
€2.69
AKSION!
0.99€
0.95€
3.09€
1.49€
1.89€
1.75€
1.95€
3.99€
€2.69
AKSION!

0.73€
0.83€
0.79€
0.73€
0.83€
0.83€
0.95€
0.83€
0.83€



Heat Maps 2 (22.01.2018-23.01.2018) (included in the report)

Heat Maps 3 (13.02.2018-16.02.2018)


ZER


TOMATO KETCHUP
PIZZA KETCHUP
POLIMARK Keçap PIZZA
POLIMARK Keçap DJEGES
POLIMARK Keçap IEMBEL
0.73€
0.83€
0.79€
0.73€
0.83€
0.79€
0.95€
0.95€
0.83€
0.83€
1.45€
0.93€
0.93€
1.39€
1.45€
0.85€


IceTea
eko


1.39€
DŽEM


VIPPO
AJVER
Ajvar
AJVAR
Cvekla
Cveklo
0.95€
0.73€
0.73€
1.39€
1.35€
2.25€
2.25€
1.99€
1.75€
1.79€
0.95€
3.49€
1.49€
1.89€
1.75€
1.95€
3.99€
0.99€
0.95€
3.09€
1.49€
1.89€
1.75€
1.95€
3.99€
1.09€
3.49€
1.85€
1.89€
1.25€
1.25€
3.99€
1.15€
3.09€
1.65€
1.65€
1.89€
1.39€
1.79€
3.96€


ZER
ZER
ZER


TOMATO
KETCHUP
PIZZA
POLIMARK
Keçap
0.73€
0.83€
0.79€
0.95€
1.45€


VIPPO
AJVER
0.95€
0.73€
0.73€
1.39€
1.35€
2.25€
2.25€
0.95€
3.49€
1.49€
1.89€
1.75€
0.99€

Heat Maps 4 (01.02.2018-07.02.2018)


ZER

0.73€
0.83€


0.79€
0.73€
0.95€


eko