

## Poland

### “Mornings with GfK”

For the fourth time - so we may already say “traditionally” - GfK Polonia has organised a breakfast meeting with our top clients, as an occasion for a chat over a cup of tea or coffee. These meetings form a good opportunity to raise questions, discuss various topics and to encourage the attendees to reflect more deeply.

The previous three meetings were organised by the Consumer Tracking department and they were called “The Morning with the Panel”. As the previous meetings turned out to be a huge success, this time we decided to include other GfK departments. Together, we presented interesting data which were intended to answer the question as to whether there is economic potential in the Polish village. The data came from: Consumer Tracking (presented by Ewa Romanska), Custom Research (presented by Barbara Lewicka) and Geomarketing (presented by Przemyslaw Dwojak).

The Polish village has tended to be regarded by marketing and advertising companies as being insignificant and offering no opportunities for business. However, the rural areas represent 93% of the area of the whole country and it is where more than one third of the population lives. So we decided to have a closer look at the Polish village to find out whether the stereotype of the “poor village” is still true.

After analysing the economic situation of Polish households, their income and expenditures, we found that in the last decade, despite the common perception, households from rural areas have constituted an important group of FMCG consumers, and their potential is growing.

Since the year 2000, we have noted a significant increase in the number of people living in villages. Currently, 14.8 million people, representing 40 per cent of the population, live in villages. The purchasing power of this group within the segment of trade and services equalled 111 billion PLN in 2008, an average of 352 PLN per village inhabitant per month (compared to 434 PLN per average Pole and 486 PLN per city inhabitant per month).

We asked our respondents about their opinion on some of the stereotypes regarding the rural areas to see how many of them consider those stereotypes to be true. The results showed that the vast majority of urban communities (72%) agree with the stereotype that village households spend less money on food because they produce food for themselves: in contrast, only 54 per cent of villagers share this view. The fact is that, as a result of the increasing specialization and industrialisation to be found in rural areas, there are fewer households who produce food for themselves and the dynamics of spend on food is changing much faster in villages (78%) than in towns (just 53%). Dairy products are the key example here. This is one of the fastest growing categories in Poland in terms of value. Since 1998 it has increased by 67 per cent in terms of the whole country, whilst in the village it grew by 145 per cent!

Another interesting observation is that more and more village households use products to make cooking simpler. Penetration of products such as ready-to-use powdered soups or powdered desserts is higher within households from rural areas than amongst urban families. Easy-to-prepare food products, as well as snacks and soft drinks, are becoming more and more popular in the country household.

Alongside the increasing need for buying, the importance of modern trade channels such as discounters, hypermarkets and supermarkets is also growing. They play a more and more significant role in the purchases on the part of rural households. Despite the limited availability of such modern retailers in the countryside, members of rural households visit them more frequently and spend more money there than they did in the past.



Discounters have turned out to be the unquestionable market leaders in the rural areas, as they were first to recognise the potential of the village and started to build stores there.

The Polish village is developing dynamically and it is crucial that marketers finally realize it. It is high time to stop underestimating this target group and start including it in marketing plans.

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