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Private labels in Poland – selected results of the study

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R E S E A R C H

PMR Research, the custom research department of PMR (www.research-pmr.com), carried out a study on a nationwide sample of Polish consumers. The study was conducted in September 2009. The survey's objective was to gain an insight into the shopping patterns of Polish consumers and their views on private labels. We present selected results of this project below.

The most popular own brands

The most recognisable private labels in Poland are Tesco and Real Quality, which are recognised by 61% of respondents. At the same time 60% recognise the Carrefour brand, and 40% - another Tesco brand - Tesco Korzystny Zakup. Conversely, Wiodąca Marka, Pierwsza Cena and ECO+ are characterised by their poor recognition. The conclusion that may be drawn from these data is that the respondents mostly point to the brands whose name they associate with the name of a retail chain, or the brands which comprise this name.

Have you seen or heard of products of the following brands:*, September 2009



* Prompted awareness. Respondents were shown a list of private labels.
Based on answers provided by 410 respondents.
Respondents could select many answers.
Source: PMR Research, 2009

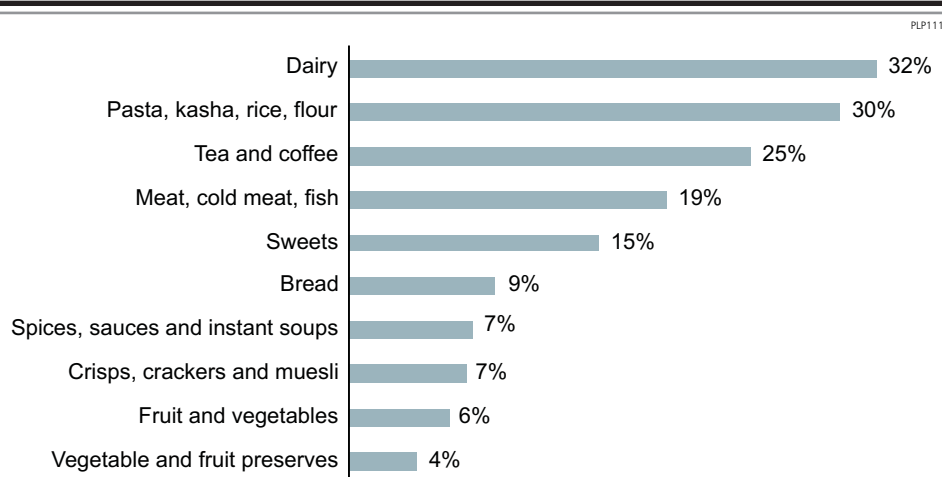
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The types of food products purchased under a private label

Among all private-labelled products purchased by the respondents, the most frequently purchased categories are food and household cleaning products. As regards food purchased under an own brand, the most frequently bought are dairy products and dry foods, such as pasta, rice, flour, tea and coffee. Meat, fish and confectioneries are also relatively popular.

What private label food products have you purchased in the last two weeks?*, September 2009



* We asked only the respondents who stated that they have bought private label food products in the last two weeks. Based on answers provided by 121 respondents. Respondents could select many answers. Source: PMR Research, 2009

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The image of private labels

- 66% of respondents consider private labels a way to shop economically
- 56% of interviewees believe that private labels are a way to shop wisely
- 56% think that the quality of private label products is getting better and better
- 41% buy private label products more frequently than a year ago
- 27% for this percentage of respondents, private label products constitute a large part of their shopping

Based on answers provided by 279-356 respondents. Source: PMR Research, 2009

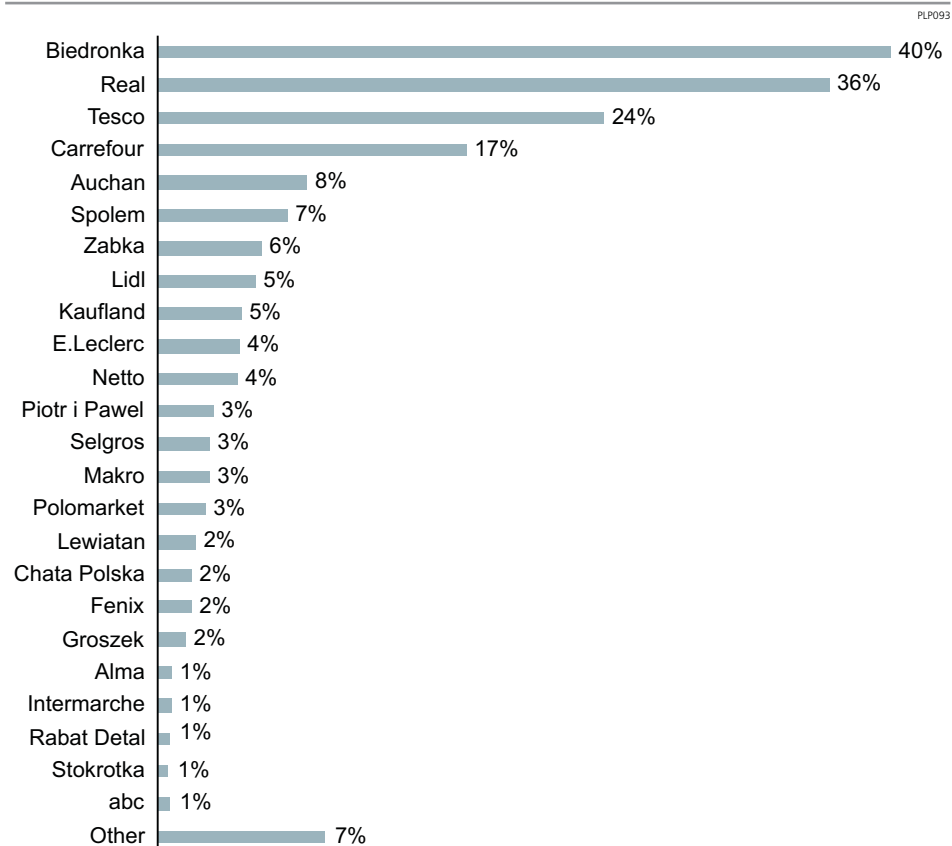
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Nowadays the perception of own brands is changing in Poland and their traditional image of having low quality products is gradually fading. The purchase of private labels is no longer treated merely as a way to shop economically (66% of respondents think so) but rather as a clever, wise way to shop (56%). More than two-fifths of the interviewees claim that they buy private labels more often compared to a year ago and twenty-seven percent say that own brands constitute a significant part of their shopping.

Additional information

What is the name of the shop you visit most frequently?*, September 2009



* Based on responses provided by consumers who, asked about the shop type they visit most frequently, answered "hypermarket", "supermarket" and "small or medium-sized self-service food shop", or answered "other shop" and gave its name.
Based on answers provided by 321 respondents.
Respondents could select many answers.
Source: PMR Research, 2009

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During the survey, PMR also asked where the respondents most frequently do their shopping. Four retail chains turned out to be clearly the most popular: Biedronka, Real, Tesco and Carrefour.

Information about the methodology of the survey

The study was carried out in all the administrative regions of Poland (voivodships), between 16th and 20th of September 2009. In each voivodship two cities were chosen: the capital and a town with between 10,000 and 100,000 inhabitants. Respondents were selected through random-route sampling. The sample comprised 416 consumers. The collected data was then submitted to weighting. The survey was conducted by face-to-face interview, at respondents' homes. PMR surveyed those people responsible in their household for buying food and articles of everyday use.

The aim of the research was to examine the Polish consumers' shopping habits, as well as their views on private label products. Identifying their preferences regarding shop formats, factors influencing the choice of each channel of distribution, and their shopping patterns was an important element of the project. Such an approach allowed for the description of the position private labels hold within the framework of PMR's respondents' shopping behaviour. PMR also took into account the current mood, linked with the economic crisis, and examined the relations between the consumers' perception of the current circumstances and their shopping habits.

Full results of the study have been published in the latest PMR report, entitled "Private label in Poland 2009 - Market analysis and development forecast for 2009-2011".

About PMR

PMR Research (www.research-pmr.com)

is the specialised custom market research unit of PMR. Services provided by PMR Research include:

- customer satisfaction studies (consumer and B2B)
- brand awareness and brand image studies
- segmentation, distribution and competition studies
- in-depth sector analyses prepared using PMR Research's proprietary methodology.

We are adept in the full array of qualitative and quantitative research methodologies. PMR Research specialises in serving clients from the IT, telecommunications, pharmaceutical, FMCG, retail and construction sectors. We also specialise in business-to-business studies. Still we provide services to companies from all sectors of the economy.

We regularly collaborate with international partners on international projects. We operate in Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Montenegro, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Turkey, Ukraine.



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