



## **Distribution and Reading of Retail Press in Poland May, 2011**



## Agenda

- 1. Information of the Research.....3**
- 2. Distribution of Retail Press.....8**
- 3. Reading of Retail Press.....16**
- 4. Retail Press in the retailers' rating.....30**
- 5. Impact of Retail Press on Purchasing Decisions of Store Owners and Managers .....34**
- 6. Summary.....36**
- 7. Legal Notice.....38**

# 1. Information of the Research

# Retail Market

## Retail Universe: food retail outlets

4

### FOOD RETAILING

≈119,143 ↓ ≈1.5% vs. 2009

LARGE-FORMATS STORES

SMALL-FORMAT STORES

Channels taken into account in the retail press reading research

HYPERMARKET

**388 (foreign)**  
**11 (Polish)**

SUPERMARKET

≈707 foreign; ≈1,100 Polish  
DISCOUNTER (≈2,357)  
≈4.164

Change vs 2009:

Hypermarket

↑ ≈3.4%

Supermarket

↓ ≈0.8%

Discount store

↑ ≈12.5%

GROC. LARGE (≈5,750)  
GROC. MEDIUM (≈26,900)

≈32.650

GROCERY SMALL

≈57.500

SPECIALTY FOOD

≈24.430

Changes vs 2009

Grocery large

↓ ≈0.9%

Grocery medium

↓ ≈1.5%

Grocery small

↓ ≈4%

Specialty food

↑ ≈2.9%

The results of distribution and reading of retail press research have been weighted by the structure of Polish retail.

# About the project



## Sample

- The research included grocery stores, supermarkets and hypermarkets. Discount stores as well as specialist stores were not included.
- The sample was prepared taken into account the following criteria:
  - A. Geographic
  - B. City size
  - C. Store surface size

### Ad. A: Geographical criteria

- ✓ Poland was divided into 4 areas in accordance with GfK's regional retail division (eastern, central, southern and north-western regions).

### Ad. B: City size

- ✓ Under 10 000 inhabitants
- ✓ From 10 000 to 50 000
- ✓ From 50 000 to 200 000
- ✓ Over 200 000

### Ad. C: Store surface size criteria

- ✓ Small stores up to 40 m<sup>2</sup> – sample 311
  - ✓ Medium-sized stores from 40 to 99 m<sup>2</sup> – sample 155
  - ✓ Large stores from 100 to 299 m<sup>2</sup> – sample 133
  - ✓ Supermarkets from 300 to 2.500 m<sup>2</sup> – sample 86
  - ✓ Hypermarkets above 2.500 m<sup>2</sup> – sample 40
- In total 725 interviews were conducted. Selection of sample and method of data analysis (weighting) ensure **representativeness of the data** for surveyed formats of shops.

# About the Project

6



## Project Objective

- The objective of the research was the analysis of distribution and reading of retail press in Poland – in grocery stores, supermarkets and hypermarkets (without discount stores and specialist stores).
- We have prepared the measuring methodology to reflect the image of the market. In order to achieve this we taken into account the results of our research pertaining to the structure and specificity of the Polish retail market.



## Methodology

- The research was conducted with the use of **personal interview** surveys carried out at the respondent's work place, i.e. in stores (PAPI, B2B).
- Respondents comprised of **owners and managers of retail outlets**.
- Due to the similarity of retail press title names, questions pertaining to distribution and reading were supported with a **presentation of front covers** of all surveyed titles.
- The cards with the front covers were arranged in four different ways/orders.

# About the Project

## Extent of the Research

- Distribution of retail press titles
  - ✓ coexistence/co-reach of retail press titles
- Reading of retail press titles, including:
  - ✓ reading in seasonal cycle (CCS)
  - ✓ reading of recent issue (COW)
- Rating of retail press titles
- Impact of advertising in retail press on purchases made for stores.

## Surveyed Titles

- The research included titles with declared circulation of 10 000 or more. Boards with cover pages were prepared for these titles and shown to respondents during supported questions. These titles are as follows:
  - ✓ Detal Dzisiaj
  - ✓ Handel
  - ✓ Handlowiec
  - ✓ Hurt & Detal
  - ✓ Magazyn Życie Handlowe
  - ✓ Poradnik Handlowca
  - ✓ Wiadomości Handlowe

## Execution period

- The interviews took place from the 6<sup>th</sup> to 20<sup>th</sup> of April 2011.

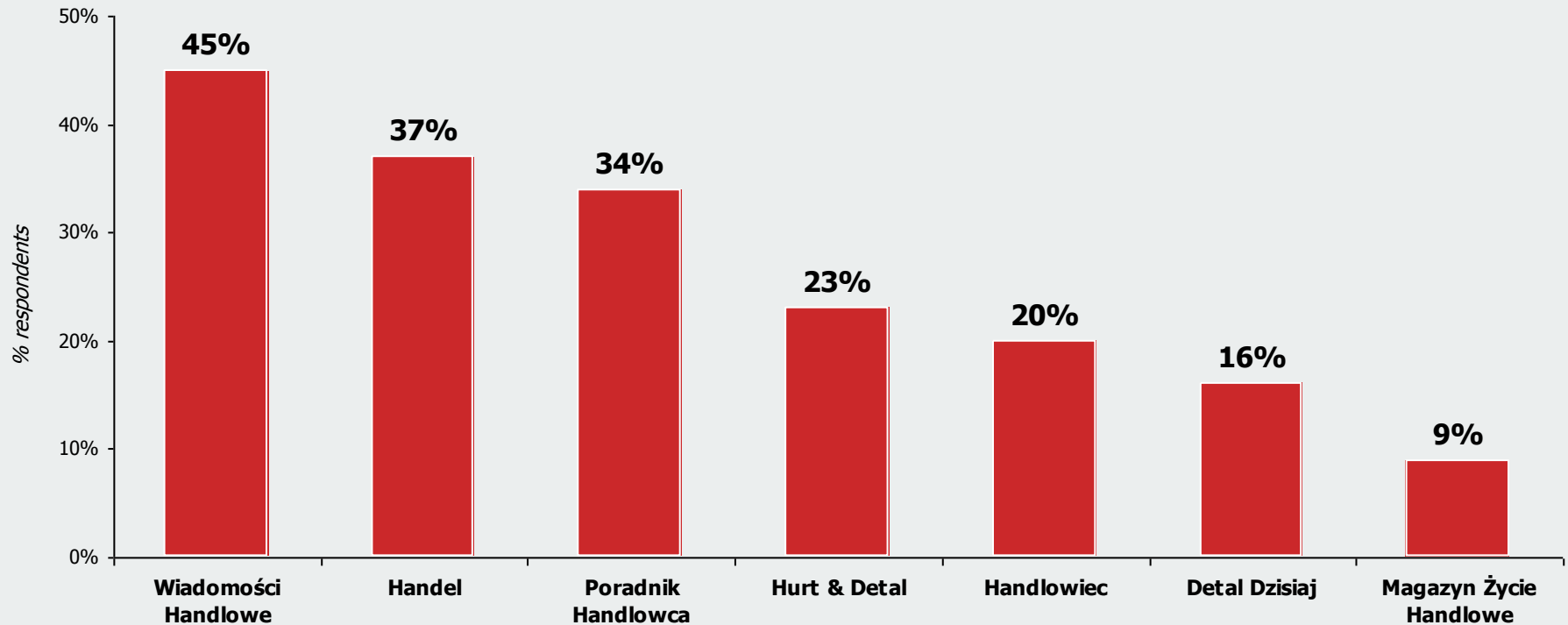
**2.****Distribution of Retail Press**

# Distribution of Retail Press

**What magazines/titles of retail press were supplied to the store over the past half year/3 months\*?**

*Question **supported** by showing cover pages of every surveyed title, **Poland***

n=725



**The highest indicator of distribution/reach to all formats (research included) of grocery stores were achieved by Wiadomości Handlowe**

\*Detal Dzisiaj (biweekly) – surveyed the last 3 months, other periodicals – surveyed the last 6 months

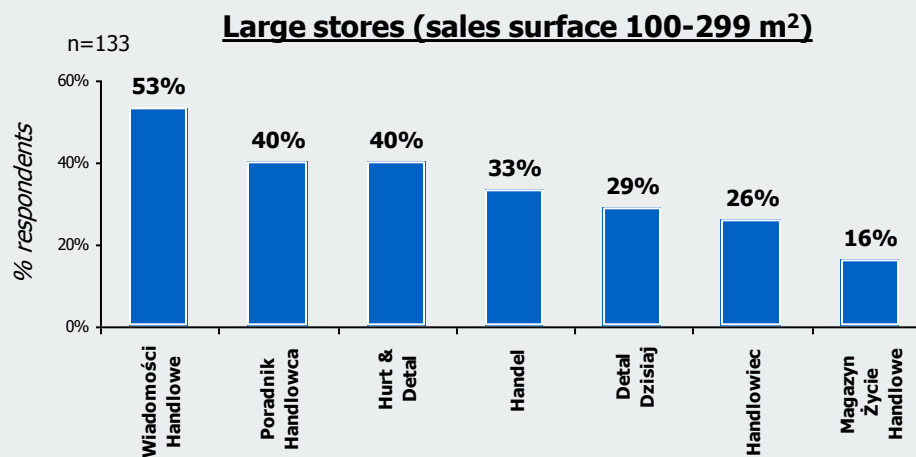
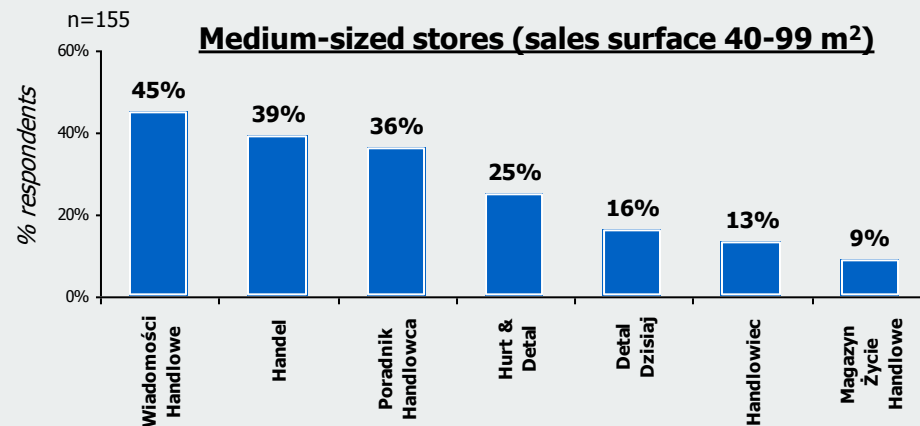
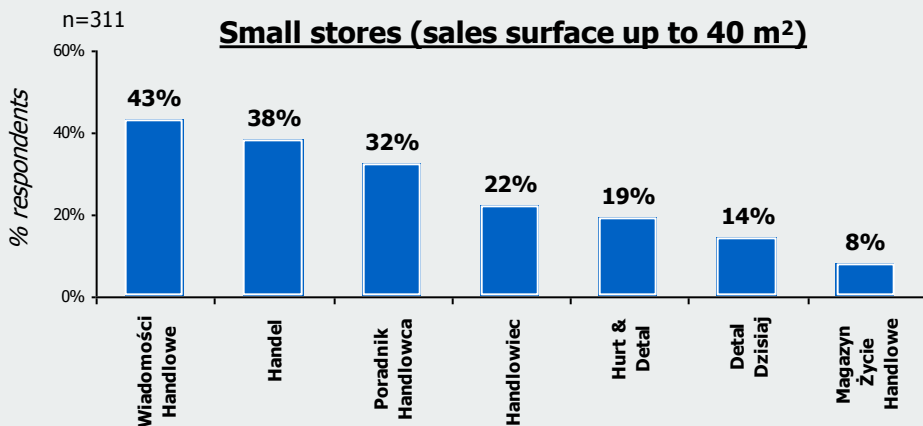
Weighted data

# Distribution of Retail Press

What magazines/titles of retail press were supplied to the store over the past half year/3 months\*?

Question *supported* by showing cover pages of every surveyed title

10



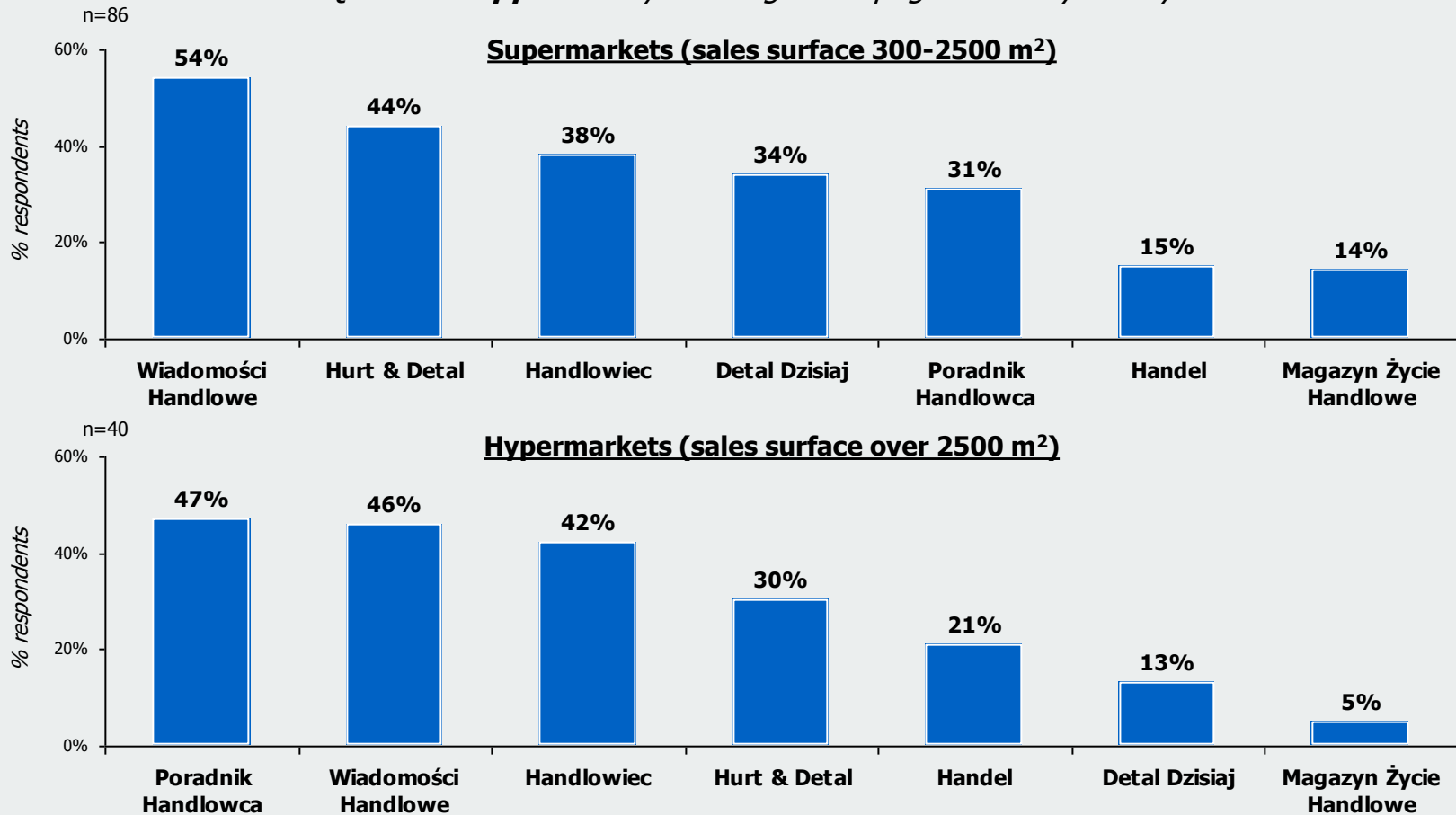
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Weighted data

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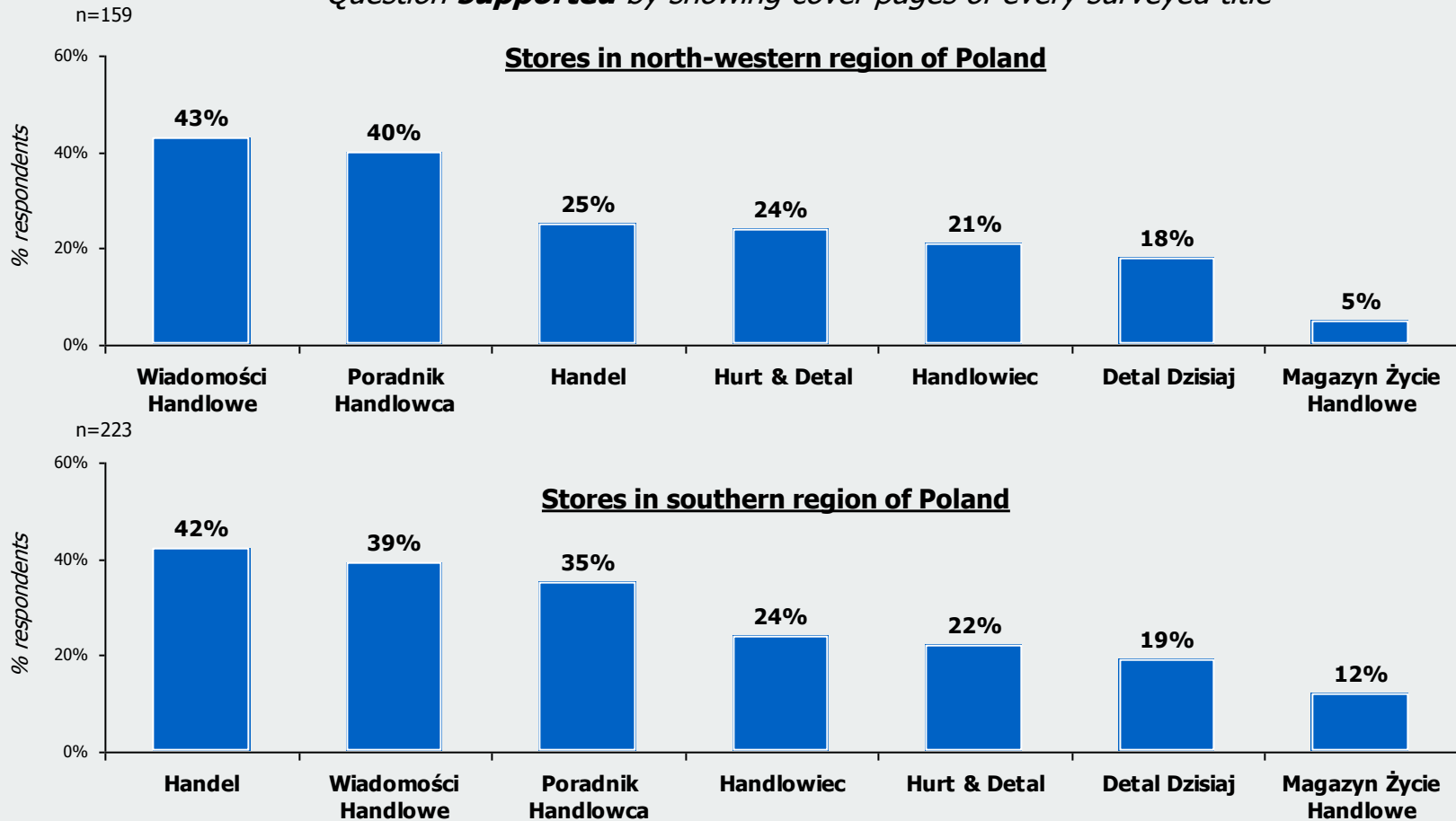
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# Distribution of Retail Press

12

**What magazines/titles of retail press were supplied to the store over the past half year/3 months\*?**

*Question **supported** by showing cover pages of every surveyed title*



\*Detal Dzisiaj (biweekly) – surveyed the last 3 months, other periodicals – surveyed the last 6 months

Weighted data

# Distribution of Retail Press

What magazines/titles of retail press were supplied to the store over the past half year/3 months\*?

13

Question **supported** by showing cover pages of every surveyed title



\*Detal Dzisiaj (biweekly) – surveyed the last 3 months, other periodicals – surveyed the last 6 months

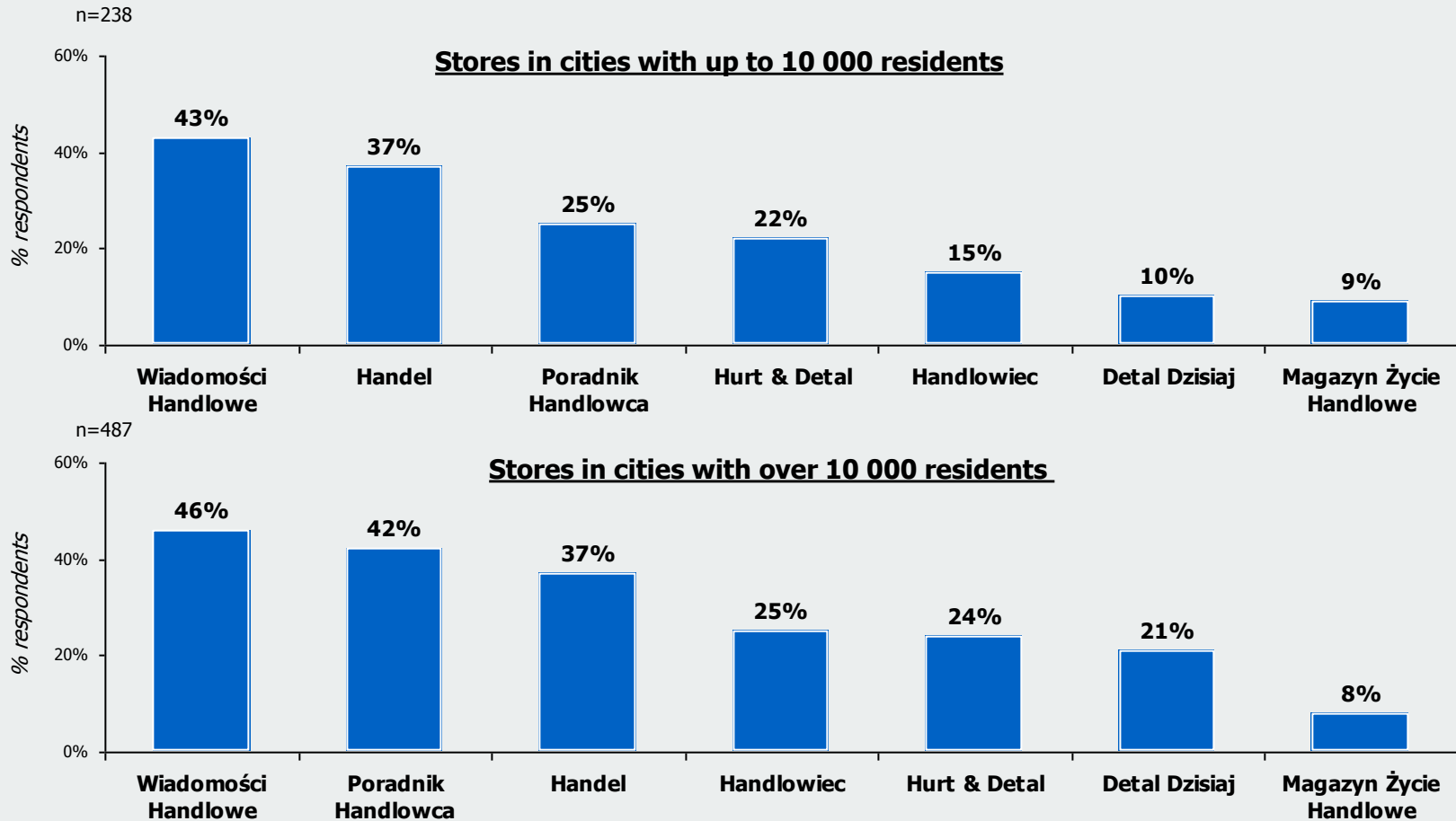
Weighted data

# Distribution of Retail Press

14

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Weighted data

# Distribution of Retail Press

15

## Coexistence/co-reach of retail press titles

n=725

	Wiadomości Handlowe	Handel	Poradnik Handlowca	Hurt & Detal	Handlowiec	Detal Dzisiaj	Magazyn Życie Handlowe
Wiadomości Handlowe	45%	19%	17%	15%	10%	8%	5%
Handel	19%	37%	14%	10%	9%	8%	4%
Poradnik Handlowca	17%	14%	34%	11%	9%	7%	3%
Hurt & Detal	15%	10%	11%	23%	7%	5%	3%
Handlowiec	10%	9%	9%	7%	20%	4%	2%
Detal Dzisiaj	8%	8%	7%	5%	4%	16%	2%
Magazyn Życie Handlowe	5%	4%	3%	3%	2%	2%	9%

**Both distribution and co-reaching of retail press are very differentiated. For example Wiadomości Handlowe and Handel coexist in 19% of grocery stores. Coexistence of Wiadomości Handlowe and Poradnik Handlowca is at 17%**

### **3. Reading of Retail Press**

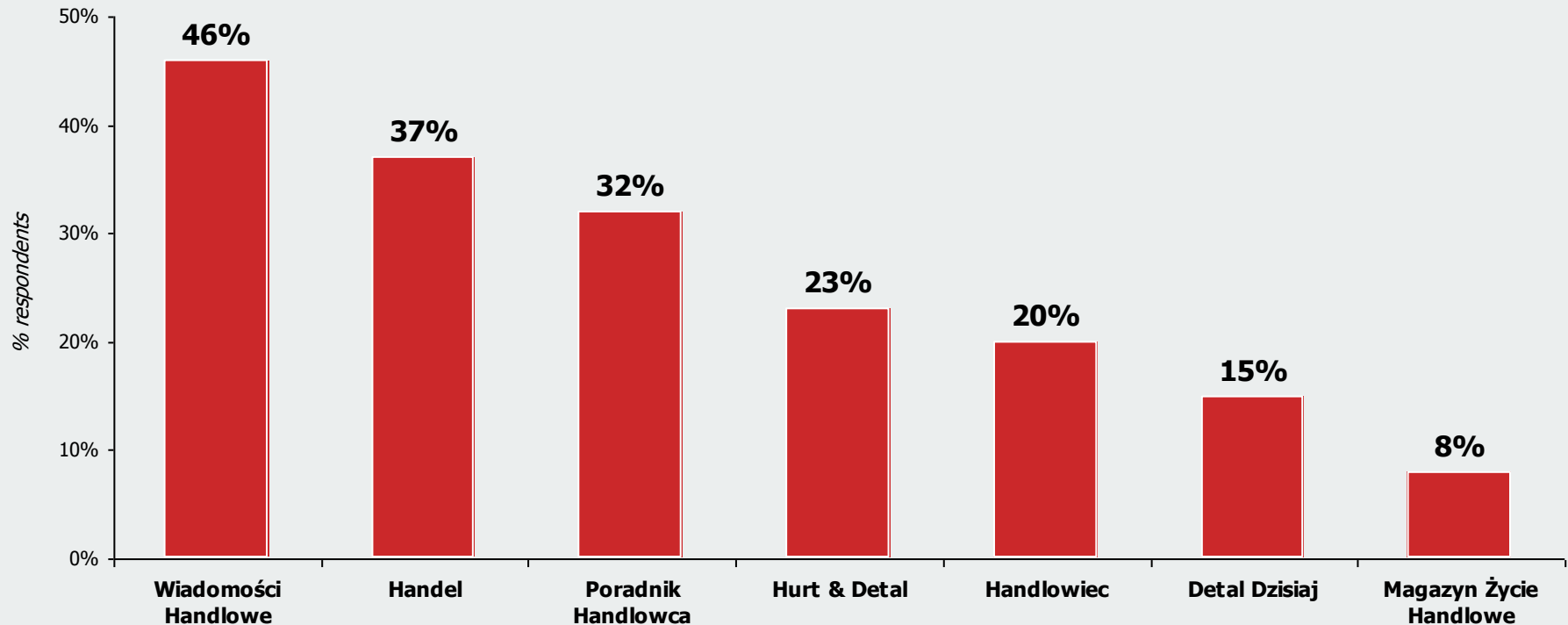
# Reading in Seasonal Cycle (CCS)

17

**Did you read or browse through the following retail press over the past half year/3 months\*?**

Question **supported** by showing cover pages of every surveyed title, **Poland**

n=725



**The highest reading indicator in seasonal cycle was achieved by Wiadomości Handlowe. Second and third place goes to Handel and Poradnik Handlowca**

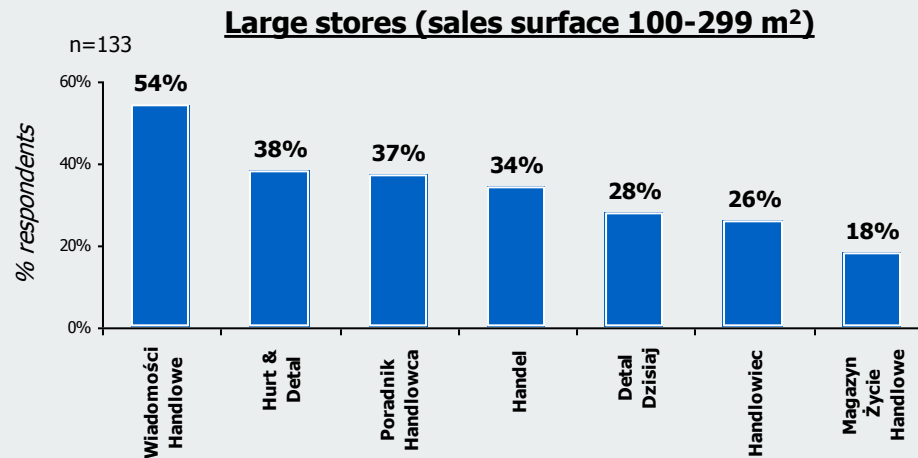
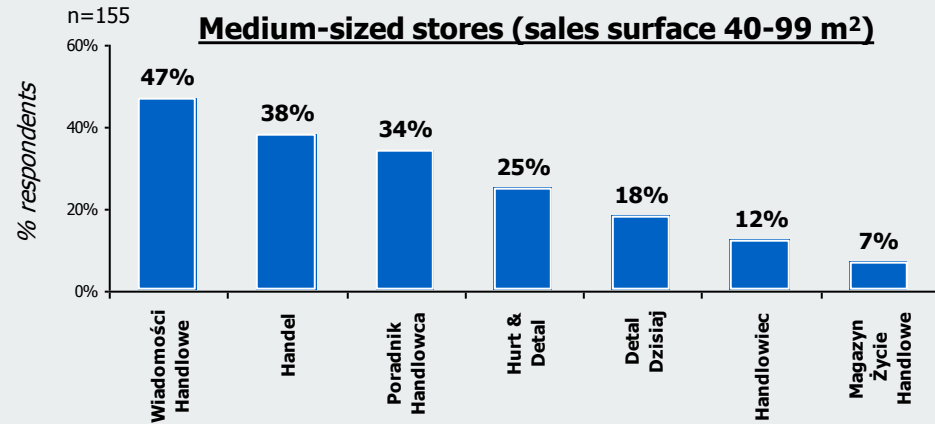
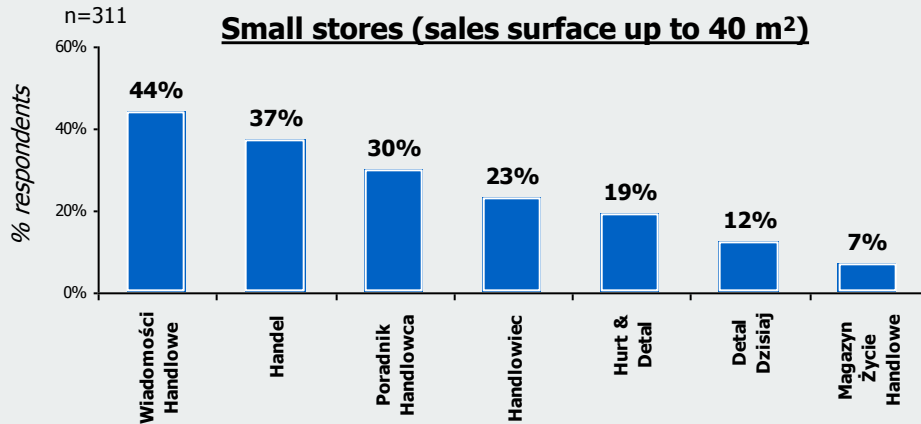
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Weighted data

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Did you read or browse through the following retail press over the past half year/3 months\*?

Question **supported** by showing cover pages of every surveyed title

18

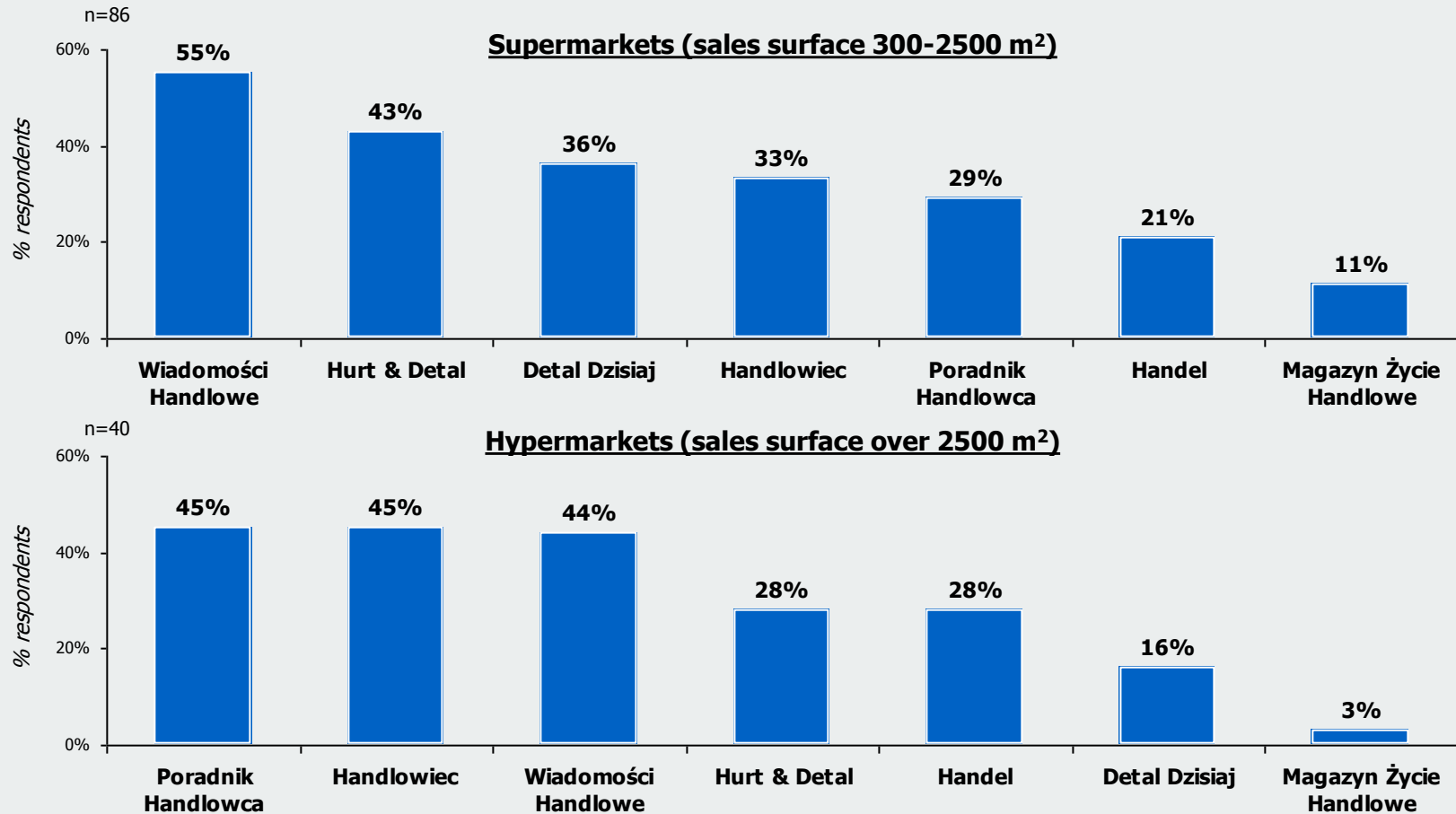


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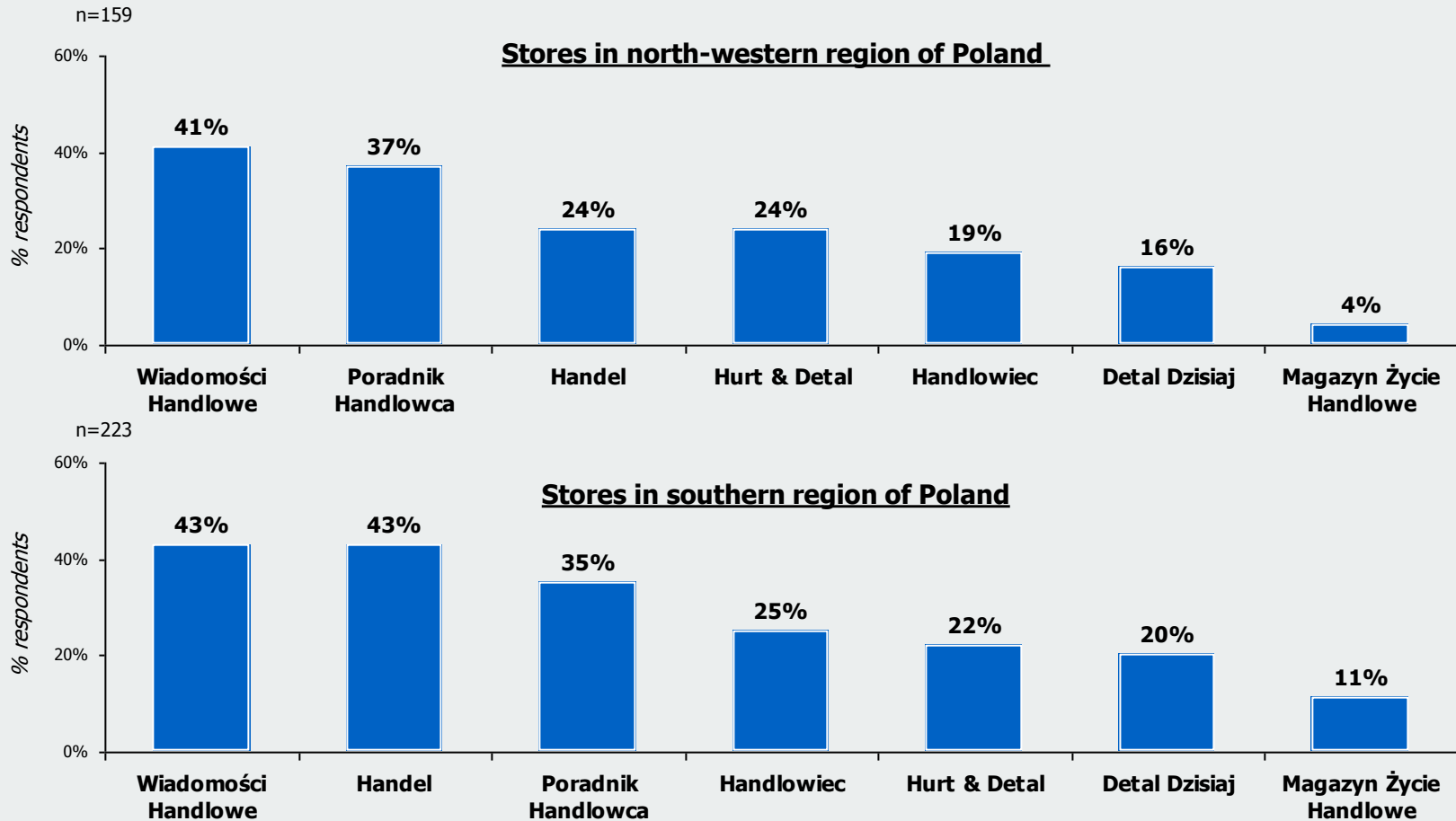
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Weighted data

# Reading in Seasonal Cycle (CCS)

20

Did you read or browse through the following retail press over the past half year/3 months\*?

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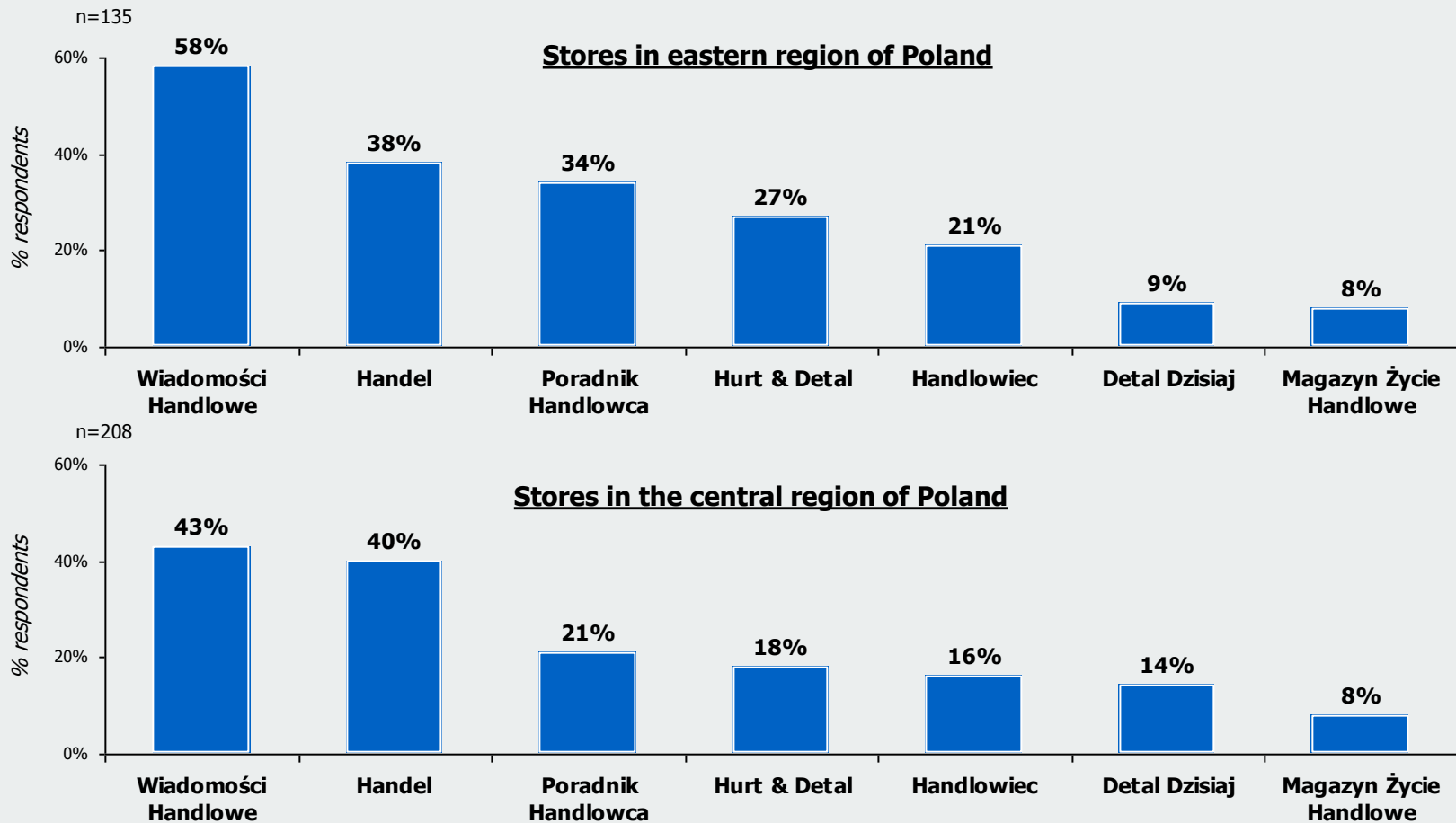
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Weighted data

# Reading in Seasonal Cycle (CCS)

21

Did you read or browse through the following retail press over the past half year/3 months\*?

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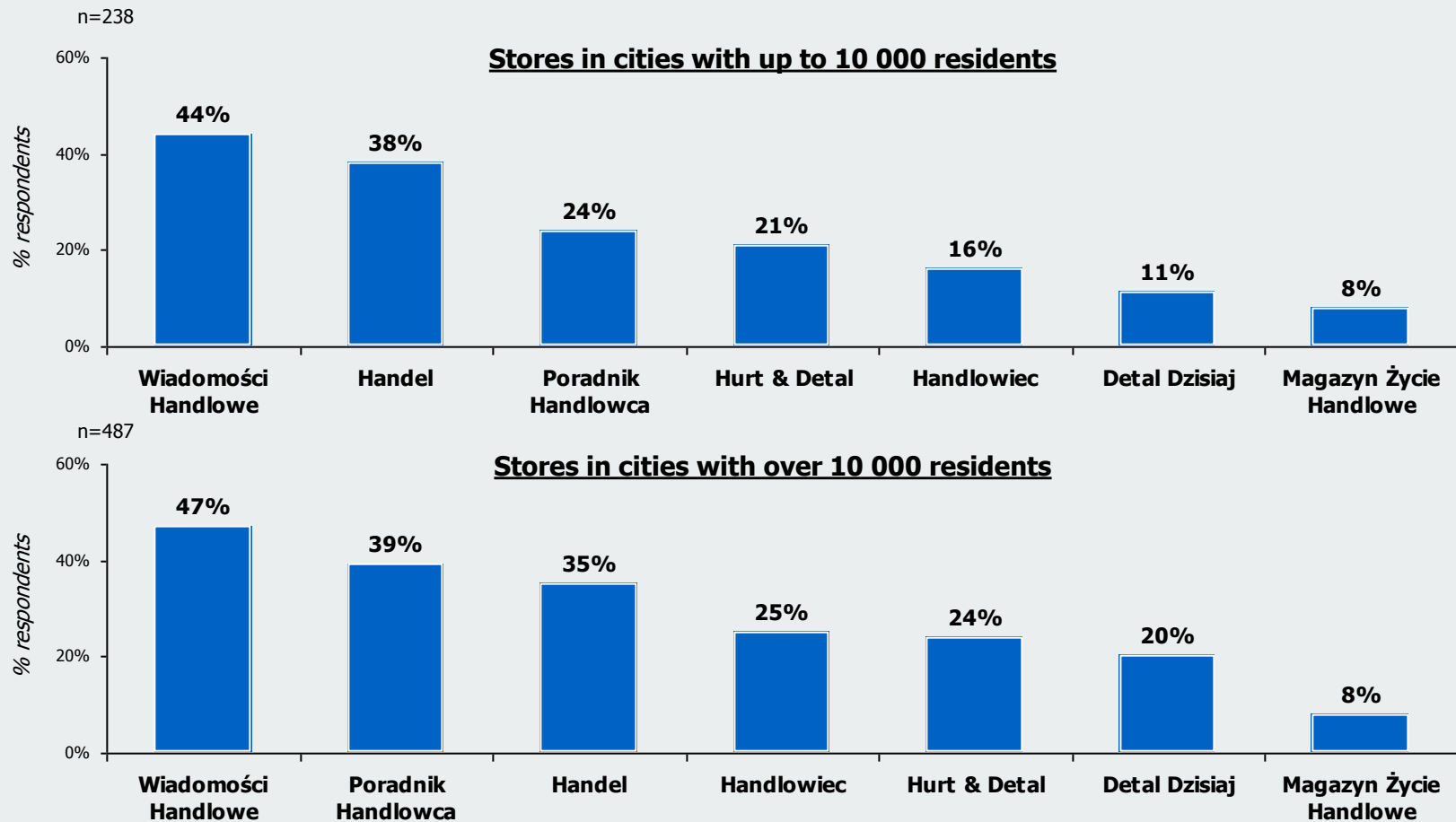
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Weighted data

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22

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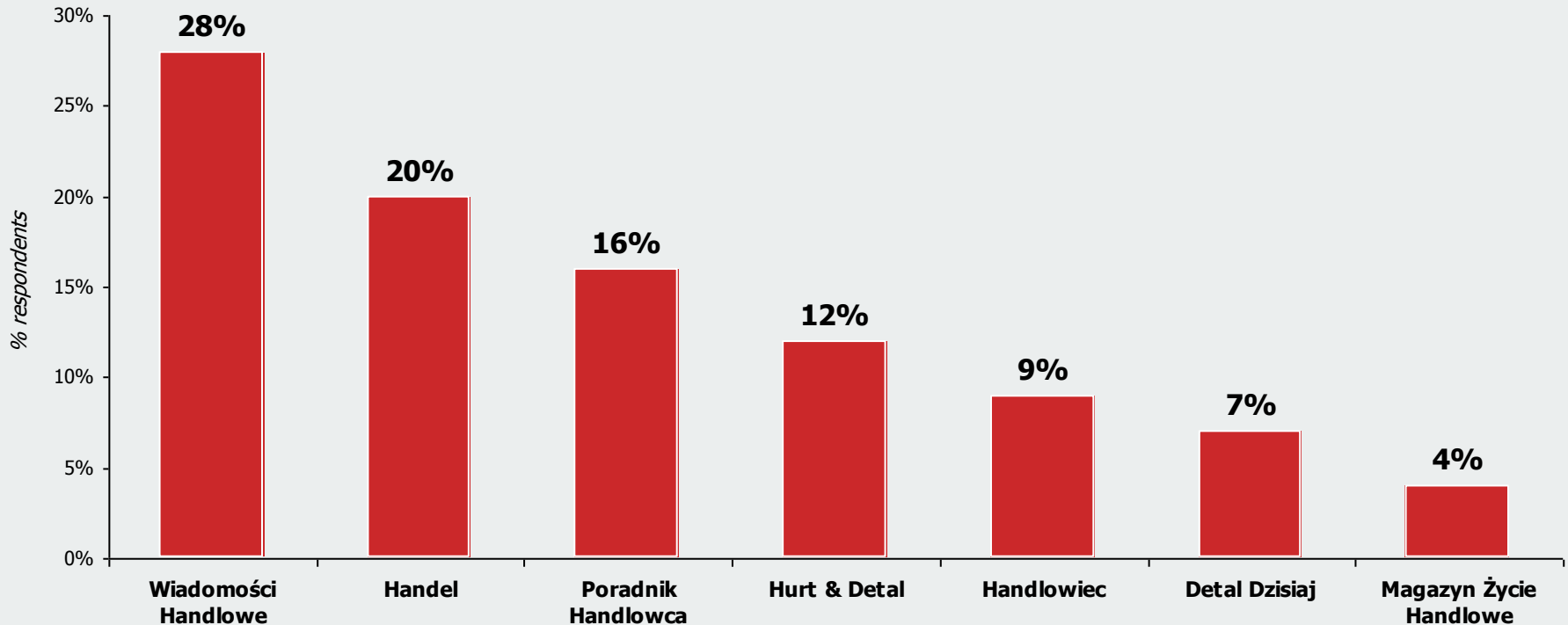
\*Detal Dzisiaj (biweekly) – surveyed the last 3 months, other periodicals – surveyed the last 6 months  
Weighted data

# Reading of Recent Issue (COW)

23

The percentage of retailers who declared that they read or browsed though the latest issue of the following titles

n=725 Question **supported** by showing the last 4 cover pages of every surveyed title, **Poland**



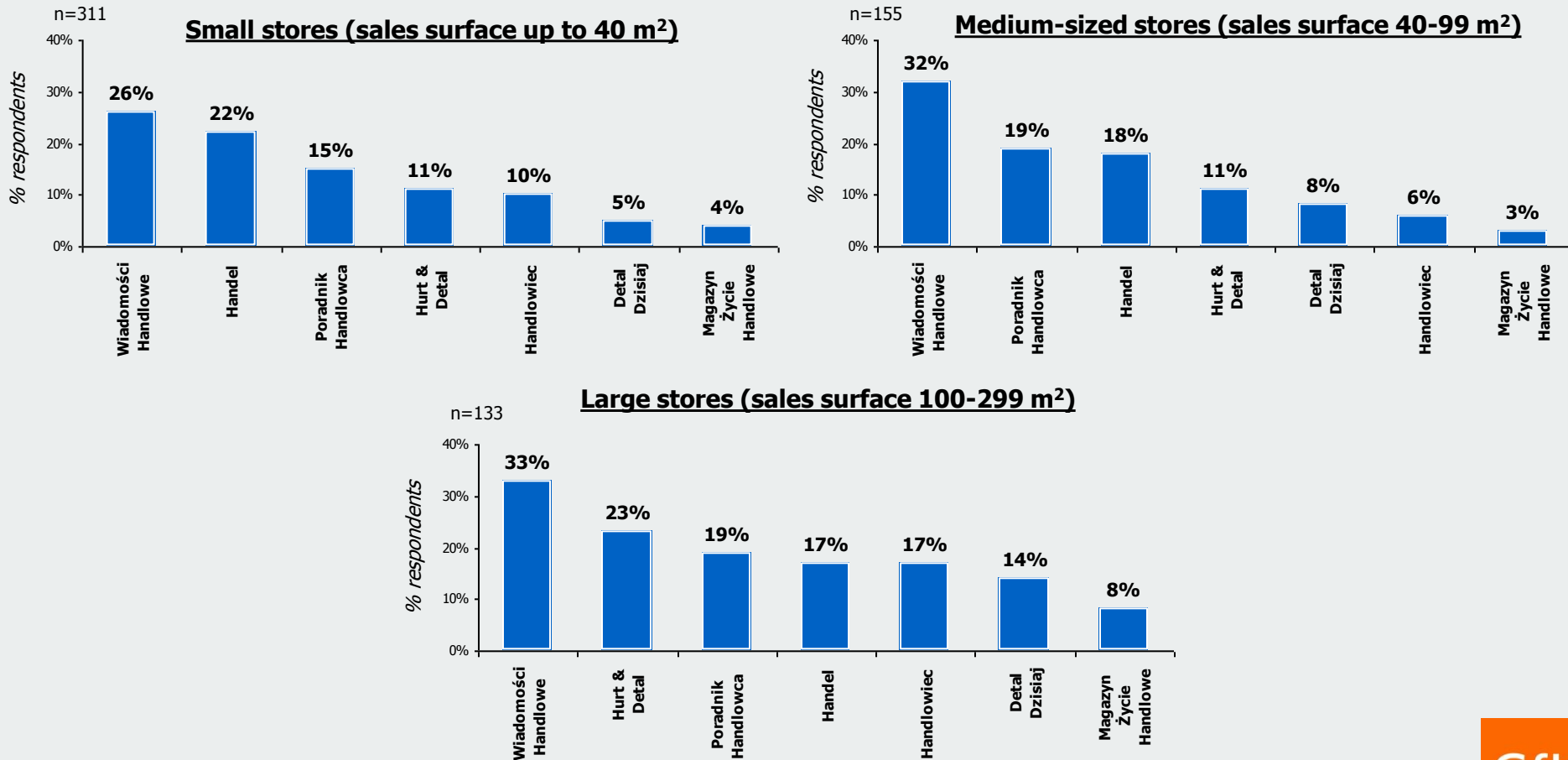
The largest number of retailers declared they have read or browsed through **Wiadomości Handlowe**. Every fifth respondent pointed to the latest edition of the monthly **Handel**

# Reading of Recent Issue (COW)

24

The percentage of retailers who declared that they read or browsed though the latest issue of the following titles

Question **supported** by showing the last 4 cover pages of every surveyed title



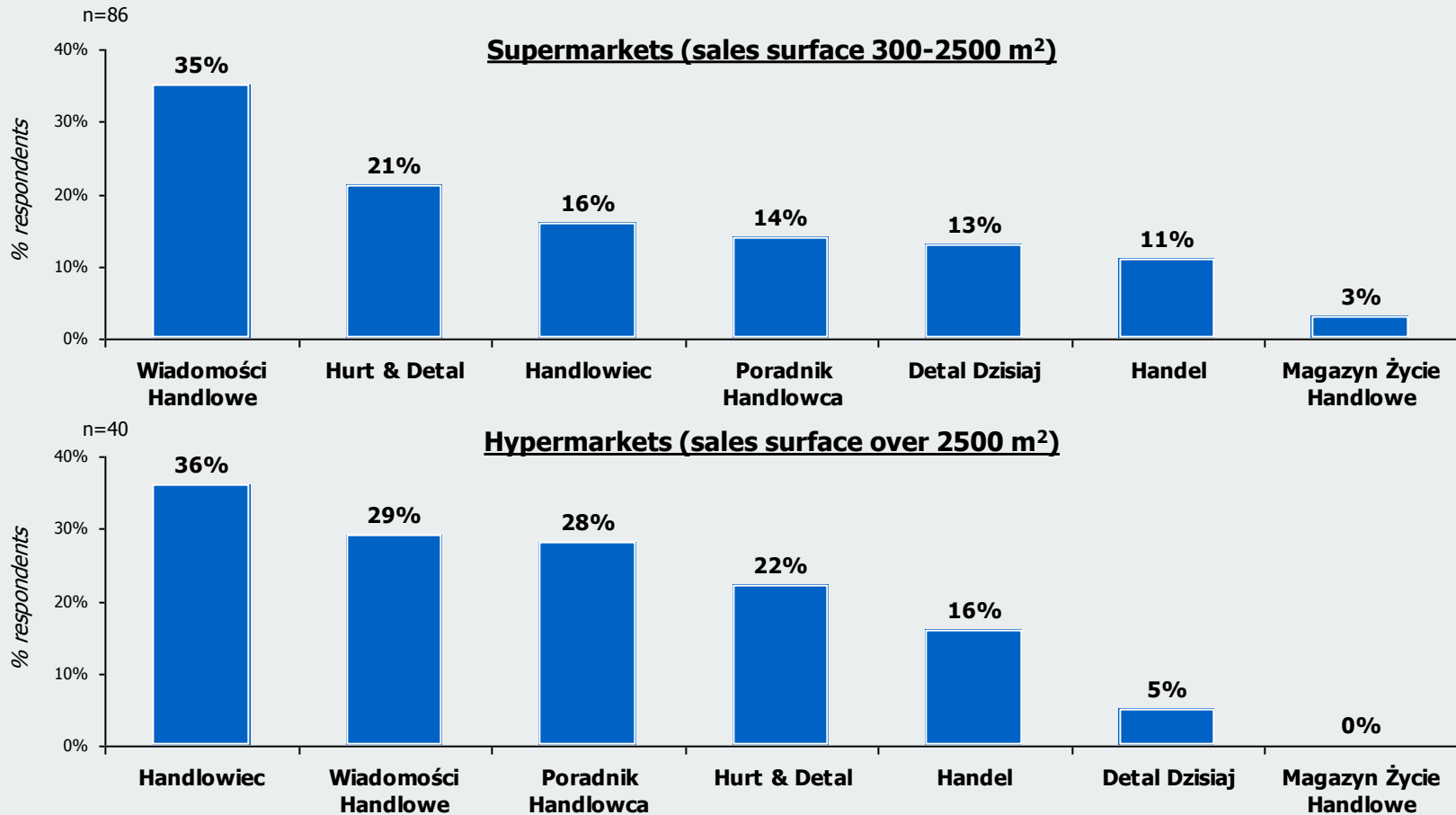
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Weighted data

# Reading of Recent Issue (COW)

25

The percentage of retailers who declared that they read or browsed though the latest issue of the following titles

Question **supported** by showing the last 4 cover pages of every surveyed title



\*Detal Dzisiaj (biweekly) – surveyed the last 3 months, other periodicals – surveyed the last 6 months  
Weighted data

# Reading of Recent Issue (COW)

26

The percentage of retailers who declared that they read or browsed though the latest issue of the following titles

Question *supported* by showing the last 4 cover pages of every surveyed title



\*Detal Dzisiaj (biweekly) – surveyed the last 3 months, other periodicals – surveyed the last 6 months  
Weighted data

# Reading of Recent Issue (COW)

27

The percentage of retailers who declared that they read or browsed through the latest issue of the following titles

*Question supported by showing the last 4 cover pages of every surveyed title*



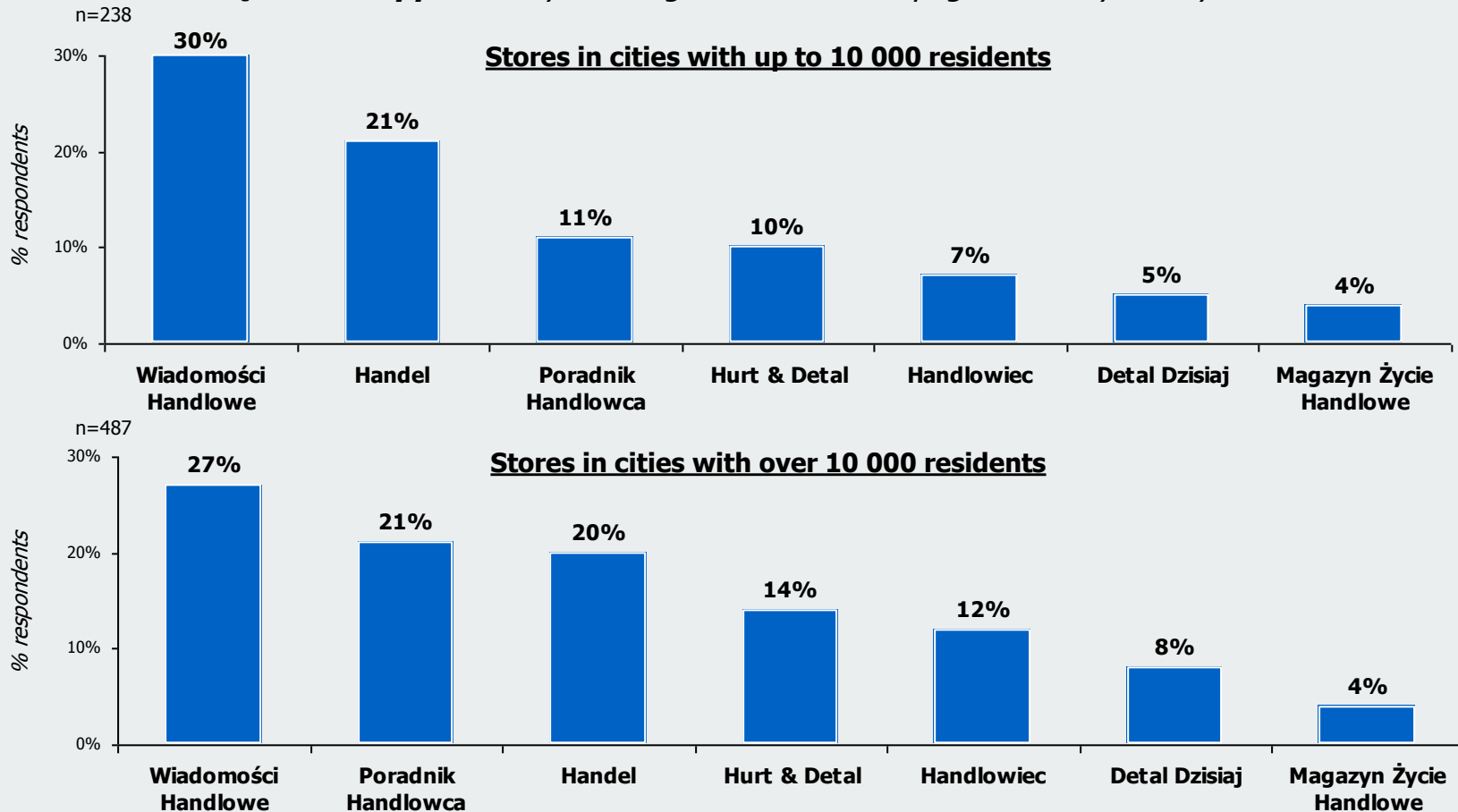
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Weighted data

# Reading of Recent Issue (COW)

28

The percentage of retailers who declared that they read or browsed though the latest issue of the following titles

Question *supported* by showing the last 4 cover pages of every surveyed title



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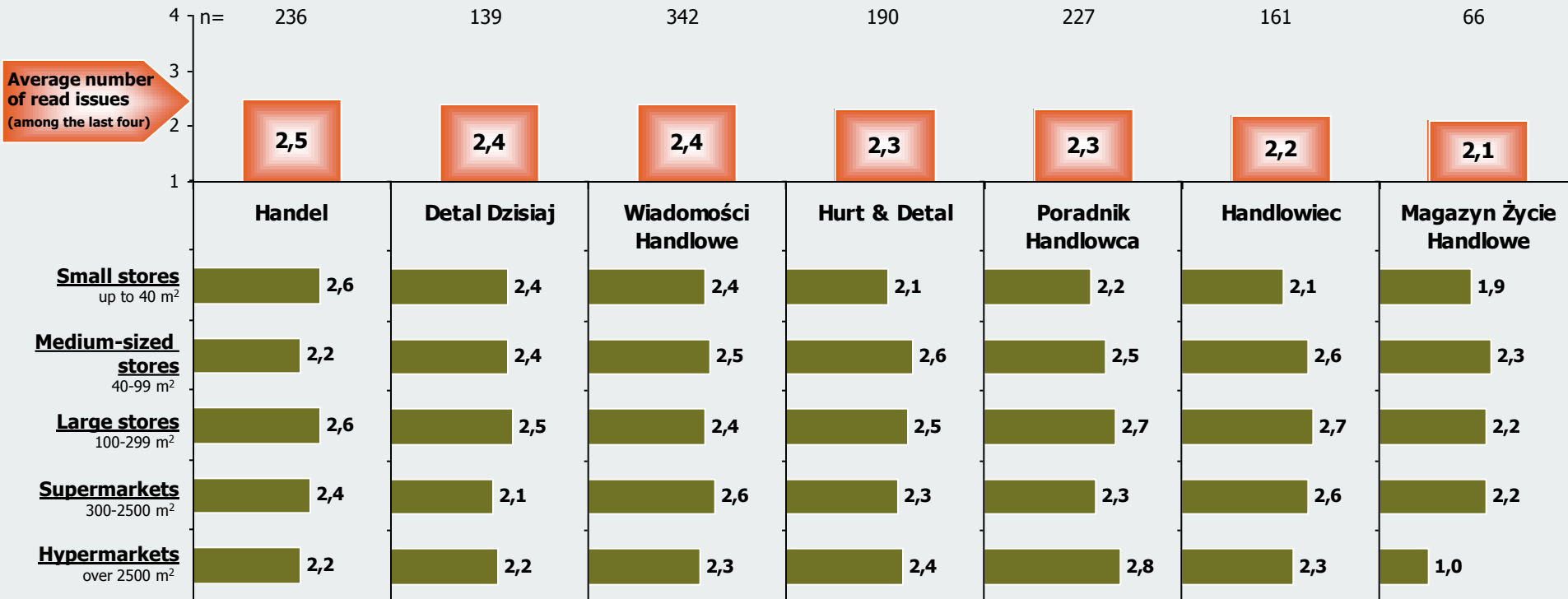
Weighted data

# Average Number of Read Issues (among the last four) (ŚLCW4)

29

## Average number of read issues of the following titles (among the last four issues)

Question **supported** by showing the last 4 cover pages of every surveyed title, **Poland**



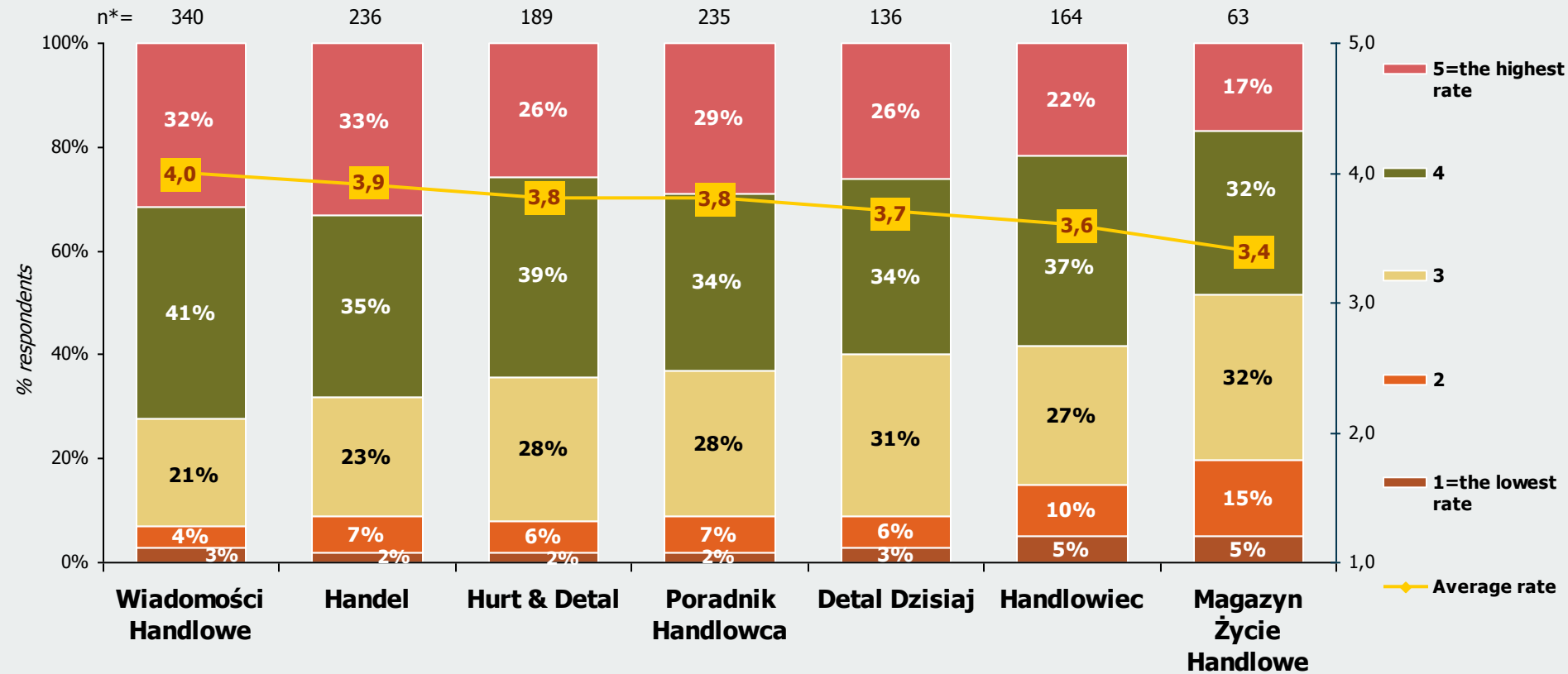
Respondents declared reading on average 2 of the last 4 issues

**4.****Retail Press in the retailers' rating**

# Retail Press in the retailers' rating

Poland - total

**Which magazines that you read deliver the largest number of interesting information about retail and food market, helping you to increase your sale?**  
(scale 1-5, where 5 is the highest rate)



**In retailer's opinion monthly Wiadomości Handlowe delivers the largest number of interesting information about retail and food market**

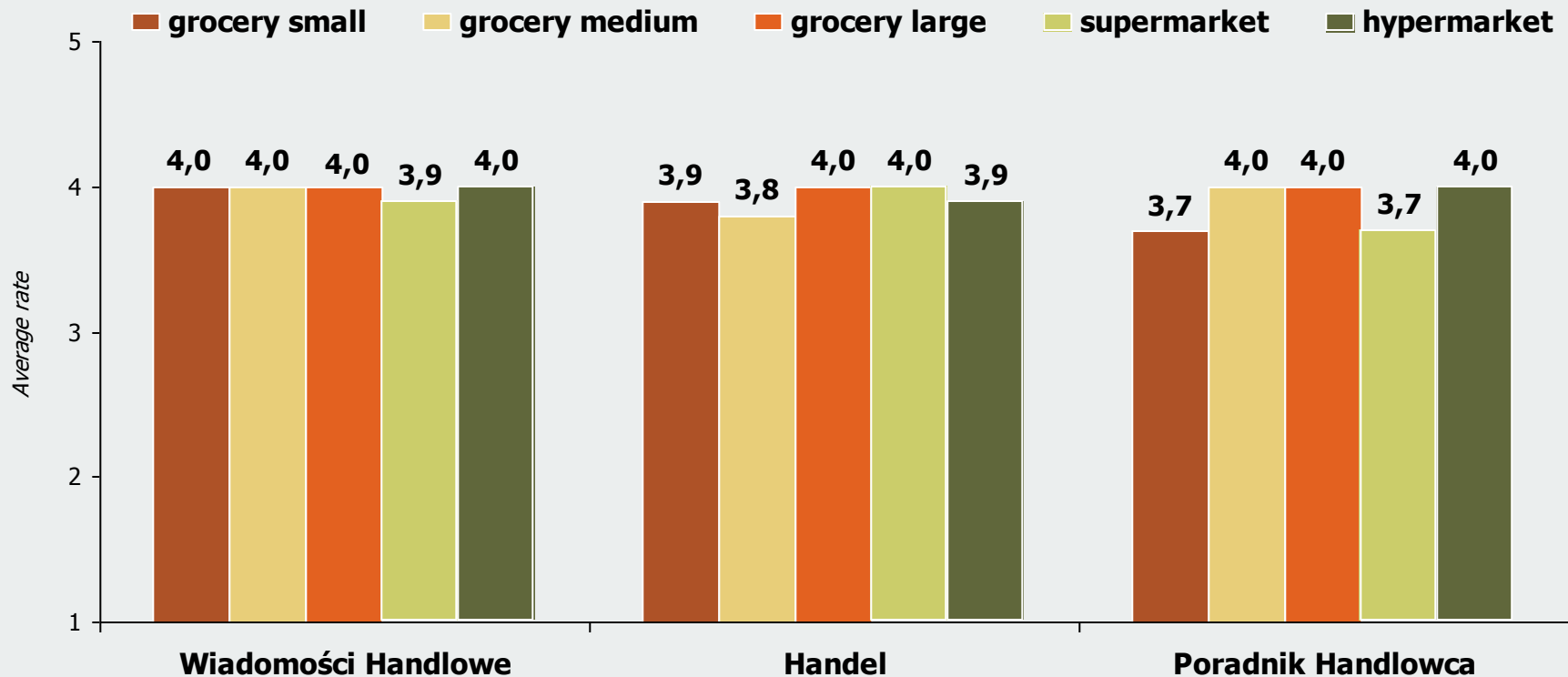
\*Base: people who read/browse any of the retail press magazines

Weighted data

# Retail Press in the retailers' rating

Average rating by types of stores

**Which magazines that you read deliver the largest number of interesting information about retail and food market, helping you to increase your sale?**  
(scale 1-5, where 5 is the highest rate)



**Wiadomości Handlowe was rated high by all types of stores**

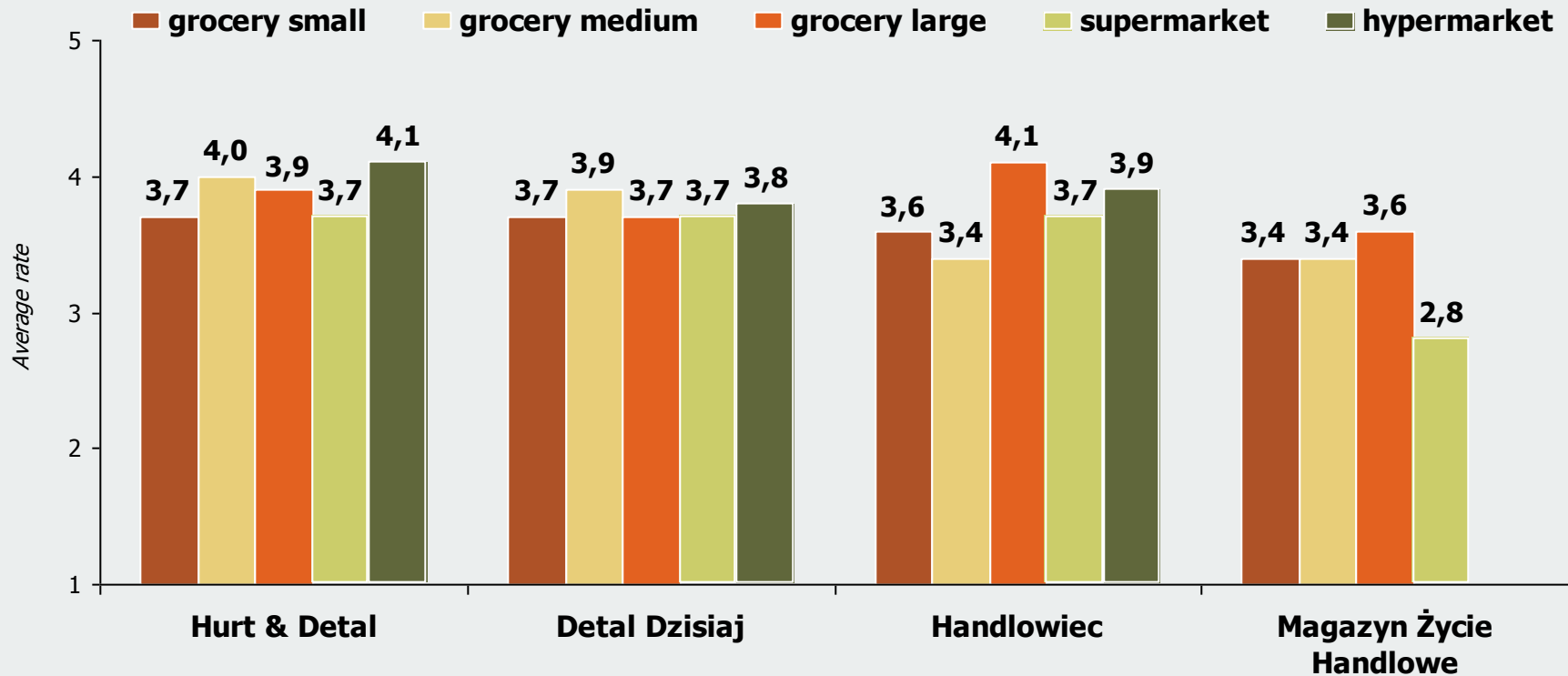
\*Base: people who read/browse any of the retail press magazines  
Weighted data

# Retail Press in the retailers' rating

Average rating by types of stores

**Which magazines that you read deliver the largest number of interesting information about retail and food market, helping you to increase your sale?**

(scale 1-5, where 5 is the highest rate)



\*Base: people who read/browse any of the retail press magazines

Weighted data

**5.**

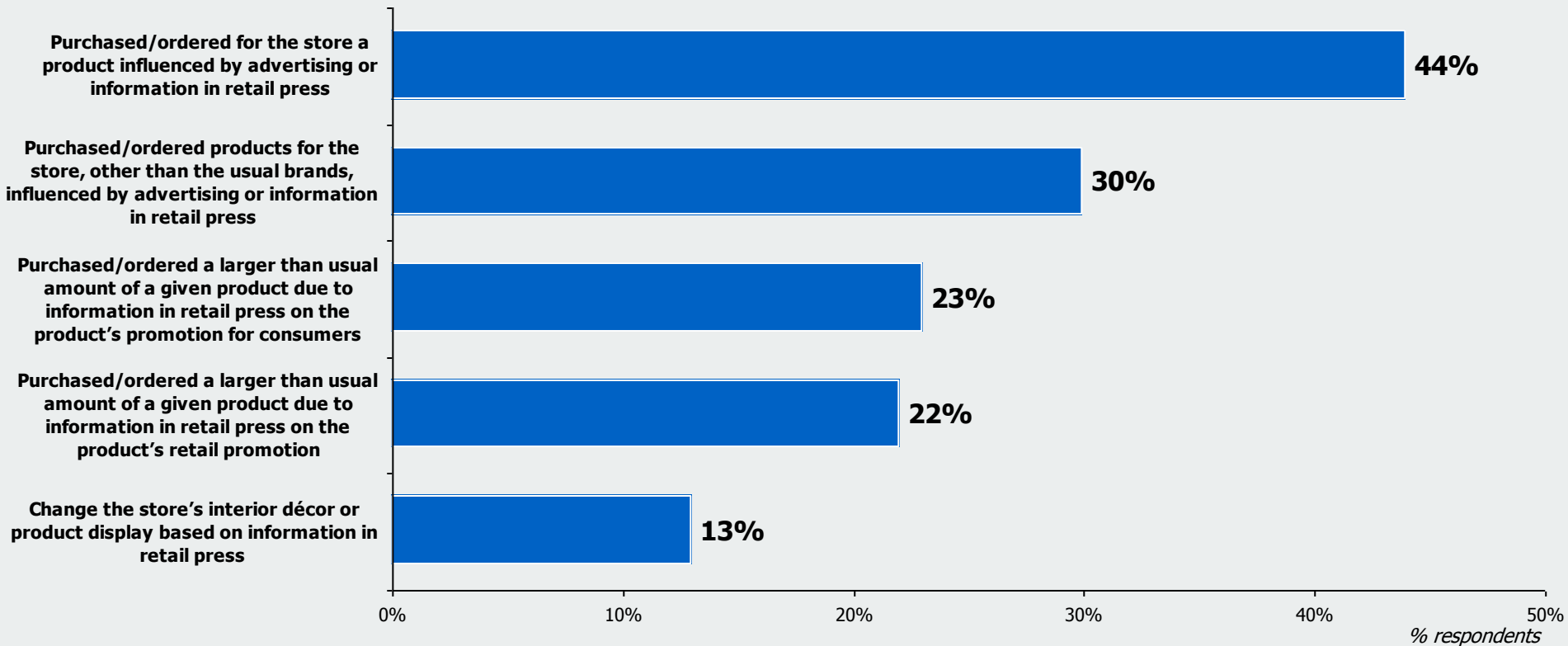
## **Impact of Retail Press on Purchasing Decisions of Store Owners and Managers**

# Impact of Retail Press on Purchasing Decisions of Store Owners and Managers

35

n=632  
(people that read/browse  
through any of the surveyed  
retail press magazines)

**Over the past 3 months, you...?**  
(% of respondents that answered affirmatively)



**Over 40 % of respondents purchased/ordered for the store a product influenced by advertising or information in retail press**

## 6. Summary

# Summary

37

- ➔ Monthly **Wiadomości Handlowe** has a **leader position** on a retail press market among seven surveyed titles, regarding its reach as well as reading in small, medium and large groceries, supermarkets and hypermarkets (discounts and specialty stores not included). The second and third place goes to Handel and Poradnik Handlowca.
- ➔ In retailer's opinion monthly **Wiadomości Handlowe delivers the largest number of interesting information** about retail and food market. The magazine has the highest average rate (4,0 in 5 point scale). Vice leaders are: Handel (3,9), Hurt&Detal and Poradnik Handlowca (3,8).
- ➔ Advertising and information included in retail press **have a significant impact** on orders placed by store owners and managers. Over 40% of respondents purchased or ordered a product for the store influenced by advertising or information in retail press. 30% purchased products for the store other than the usual brands, and over 20% retailers ordered a larger amount of a given product due to information on the product's promotion. Also over 13% of retailers changed the interior décor of the store or product display using information provided in retail press.

## **7.** Legal Notice

# Legal Notice

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39

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