STOWARZYSZENIE EKONOMISTÓW ROLNICTWA I AGROBIZNESU
Roczniki Naukowe ● tom XIII ● zeszyt 6

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THE TRENDS ON THE MARKET OF FAST-MOVING CONSUMER GOODS IN THE OPINION OF THE POLISH CONSUMERS FROM 2001 TO 2010

TENDENCJE NA RYNKU DÓBR SZYBKO ZBYWALNYCH W OPINIACH POLSKICH KONSUMENTÓW W LATACH 2001-2010

Key words: a consumer, FMCG, shopping, consumption
Słowa kluczowe: konsument, FMCG, zakupy, konsumpcja

Abstract. The article presents the results of the surveys on the shopping habits of the Polish consumers and their change in the past decade. It discusses trends in likings and habits of the Polish consumers. It identifies the transformation of the process of shopping for the fast-moving consumer goods and the changes in the opinions and in the purchasing preferences of the consumers from 2001 to 2010 according to the age, level of education and the gender of the respondents.

Introduction

The changes in the consumer environment have been and are the stimuli for looking for new methods of activities. They also open new opportunities for gaining new experiences which are exemplified in specific market attitudes and behaviors of the consumers. The familiarity with the preferences and with the purchase behaviors of the consumers is, on the other hand, an indicator of the direction of the strategy of companies' activities, among other things, of the FMCG market.

The article presents an analysis of the trends of the changes of the shopping preferences and behaviors of the Polish consumer within the past decade. It identifies the transformation of the process of buying the goods and the changes in the opinions and purchase preferences of the consumers. The presented results include measurements conducted each time in December from 2001 to 2010 on a representative sample of the population of Poland.

Materials and methodology

The source of the empirical material was the tracking surveys conducted by TNS Pentor. Each cycle of the surveys was conducted on a 1000-strong representative and randomly selected sample of the residents of the country (over 15 years old). The polls were conducted using a personal interview technique („face-to-face"), at the weekend and at the respondents' homes which were selected using the random-route method. 200 research areas were randomly selected for each cycle of the survey. The used algorithm of the selection was based on the data from the national census which were also used in the process of weighting the research results.

Results

The consumer as a participant of the market makes decisions and undertakes actions which aim at fulfilling certain consumer needs. Poles give various reasons for the place where they like to do their shopping most of all [Foxall 1998]. The importance of each reason determining the selection of the place of doing the shopping in the perception of the society has practically not changed in the past ten years. The most important reasons include low prices, proximity to the place of residence, opening hours of the stores and convenient days, as well as the high quality of the offered products, polite customer service, attractiveness of the offered goods, habits and promotions and sales (Fig. 1). The following aspects play a less important role, namely, the size of the store, easy access, a parking lot, proximity to the place of work or the fact whether the store accepts payment and credit cards.

The importance of getting there by car easily and the ease of moving around the store has grown in the past decade. Moreover, the weight of the fact that the store accepts payment and credit cards has been growing slowly but steadily. The opening hours of the store have an increasing importance when choosing the place of doing the shopping. At present, it is one of the main factors deciding the selection of the place to do the shopping. In 2010, for 94% of the Poles, the opening hours had a decisive importance or were important. The prices of goods were decisive for 91% of the studied consumers. The high quality of goods was also awarded high grades because it was of fundamental importance also for 91% of the respondents.

In 2001, the evaluation of the importance of the selection factors of choosing a place for doing the shopping was very similar in the groups of men and women. At present more frequently than the women, the men indicated the following factors as those influencing the selection of the place of doing the shopping, namely, the possibility to drive to the store easily by car, the possibility to pay by card, the quality of the products and the diversity of the store's offer. Unlike the men, at present the women attach more importance to low prices, the proximity to the place of residence and polite customer service.

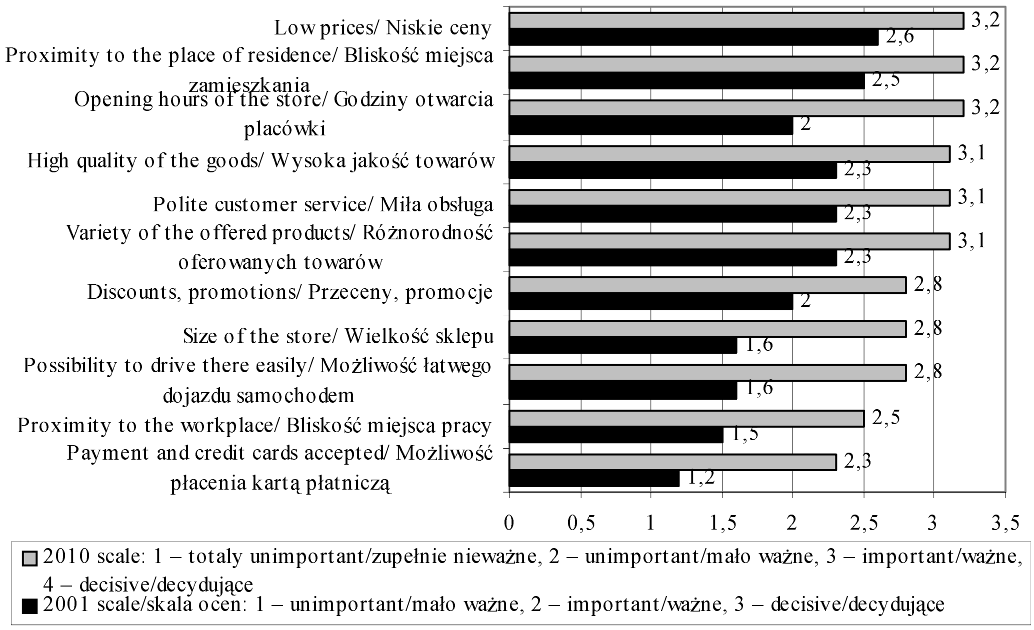

Figure 1. Significance of the factors determining the selection of the place of doing the shopping in 2001 and in 2010
Rysunek 1. Znaczenie czynników warunkujących wybór miejsca dokonywania zakupów w 2001 i 2010 roku
Source: own analysis on the basis of the database of TNS Pentor
Źródło: opracowanie własne na podstawie bazy danych TNS Pentor

In the past decade, we could observe a change in the attitudes of the consumers in the different age groups [Linstrom 2009]. In 2001, young people under 29 paid most of the attention to the low prices and the proximity to the place of residence and, most frequently among all the age groups, they paid attention to price reductions, sales and the possibility to pay by card. The location of the store close to the place of residence was the most important factor in the group of the consumers under 29 years old in 2010. In the group of people aged from 30 to 39 in 2001, the most important factors for selecting the place for doing the shopping included the low prices as well as the proximity to the place of residence and the workplace. In 2010, the proximity to the place of residence and the low prices were of the lowest significance for them among the mentioned factors. The possibility to pay by card, the size of the store as well as the attractiveness and the diversity of the offered products had the greatest influence in this group among all the studied age groups in 2010. For the people aged from 40 to 49, the low prices and the proximity to the place of residence were the most important factors for selecting the place for doing the shopping. At present, the most significant factors are the polite customer service, reduced prices and sales.

These elements are appreciated most among all the age groups. Moreover, just like ten years ago, they attach a lot of importance to the distance from the store to the place of residence. The people aged 50-59 attached the greatest importance to the low prices and the proximity to the place of residence in 2001. The latter factor is still the most important for them. Moreover, they value highly the quality of the products when choosing the place for doing their shopping. In comparison with the others, the size of the store and the ease of moving around it were less important. The most important factor in 2001 for the eldest people (60 and over) was the proximity to the place of residence. At present, this factor was replaced by the low prices. More frequently than the other people, they paid attention to the high quality of products.

The level of education of the consumers diversified the evaluation of the importance of the selection factors for doing everyday shopping to a small degree. In the group of consumers with higher education, the following factors have been invariably the most important for ten years: the low prices, promotions and bargan prices (apart from the proximity to the place of residence, the low prices and the product quality). Such factors as the proximity to the place of residence and the low prices had the biggest influence on the decision of choosing the place for doing the shopping in the group of people with vocational education in 2001. At present, the opening hours of the store turned out to be more important than the low prices. For the people with secondary education, ten years ago, the low prices were the most important, and ten years later it was the proximity to the place of residence.

More than 70% of the Polish consumers have a favorite grocery store where they do their shopping on a regular basis. Throughout the decade, however, the approval of this statement dropped which may indicate lower inertia of the consumers towards the stores where they usually do their shopping. After a decade, in comparison with 2001, the consumers attach much more attention to the quality of products (Fig. 2). The consumers also became more demanding. They find something sophisticated at the stores or for a special occasion less frequently than in 2001. On the other hand, they are more frequently driven by a momentary whim when doing the shopping. The Poles became also less loyal towards the brands of the purchased products, and they are more willing to experiment by choosing different brands of the given product.

It also happens more frequently than in 2001 that the respondents buy products advertised in the media to try them out, although the majority of the respondents do not trust these products and are unwilling to buy them [Hostyński 2006]. The Polish consumers, less frequently than in 2001, admit that they go to a grocery store every day. More than half of the respondents (61%) always check carefully the expiry date of the goods. This is particularly common among the housewives (68%). Similarly as in 2001, the majority of the respondents (68%) when going shopping, know exactly what they want to buy and buy only that [Zalega 2009]. More than half of the respondents also have a certain amount of money that is set aside for shopping per month. In 2001, this figure was 70%. The Polish consumers are increasingly more willing to take a loan to buy a product they like.

In the opinion of half of the respondents (52%), in 2010 in their households, women were responsible for the choices and the decisions concerning the products for everyday use. This figure has been one of the lowest since 1992 (Fig. 3). A model of a household where shopping is made jointly by the husband and wife is becoming more popular. This model was preferred by one-fifth of the households in 2008 and in 2010 by one-fourth. Almost every tenth man in Poland took upon himself the responsibility of doing the shopping by himself. On the other hand, 12% of the households declare that there is no member of the house there who is responsible for doing the grocery and everyday shopping.

In 2010, the women declared more frequently than the men that only the man of the house was responsible for buying the groceries and everyday-use products at their households (Fig. 3). At present, the men indicated more frequently than ten years ago the model of doing the shopping together with their wives/partners [Barber 2008]. Among the young people, it was the woman of the house who did the shopping more frequently, and in the group of 30-39, six out of ten respondents declared that they did the shopping together with their spouses, and only every tenth woman of the house was solely responsible for the shopping. In the group of people aged from 40 to 49, more than 40% of the respondents admitted that in this area the responsibility was only in the hands of the man of the house, and one-third said that it was the sole responsibility of the woman of the house. In the oldest age group, three-fourths declared that in their household only the woman of the house was responsible for doing the everyday shopping, and one-fourth admitted that the children were responsible for that. Together with a higher level of education, the number of those households where only the woman of the house did the shopping dropped, and there was an increase in the number of those people who admitted that the man of the house was responsible for the shopping.

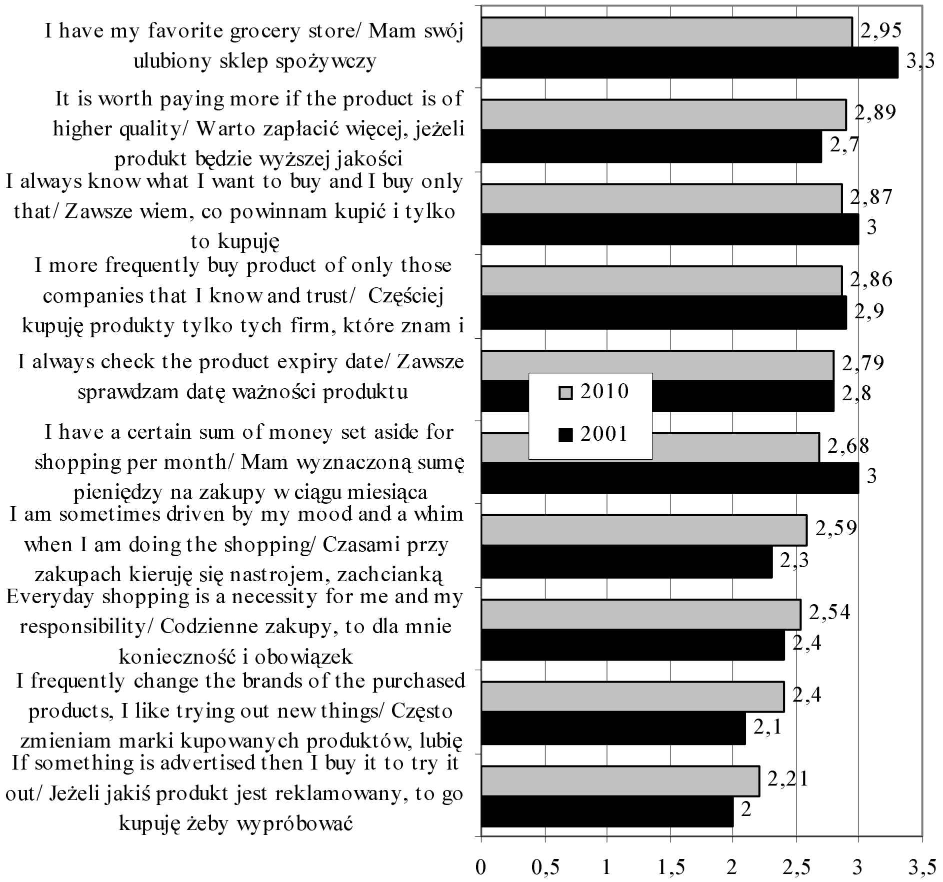

Figure 2. Shopping likings and habits of the Poles
Rysunek 2. Upodobania i przyzwyczajenia zakupowe Polaków
Source: see fig. 1
Źródło: jak na rys. 1

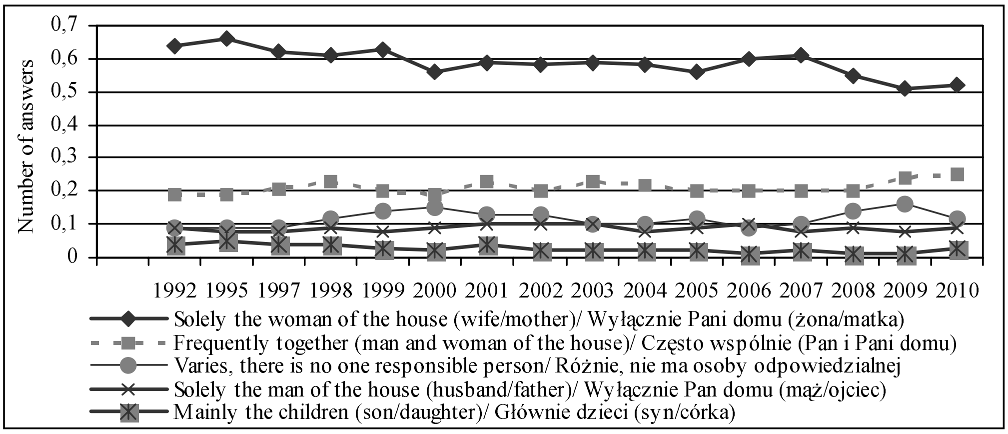

Figure 3. People responsible for buying groceries and everyday-use products at the household
Rysunek 3. Osoby odpowiedzialne za zakup produktów spożywczych i codziennego użytku w gospodarstwie domowym
Source: see fig. 1
Źródło: jak na rys. 1

In 1992, 5.4 hours per week were devoted to doing the shopping, in 1995 it was 4.3 hours, and in 2000, it was 3.6, in 2005 – 3.3, and in 2008 only 3.0 hours (Fig. 4). However, in the past two years, the number of the people who spent more than 6 hours per week shopping increases six fold; and the consumers devoted 3.6 hours per week for shopping in 2010 on the average. At present, it is the men who spend more time shopping than a decade ago. People aged 40-49 devoted most of the time for shopping in 2010. It was almost 8 hours a week on the average. In comparison, the younger age group spends only 3.6 hours shopping per week. People with vocational and elementary/ junior school education spend definitely more time than in 2001 for shopping.

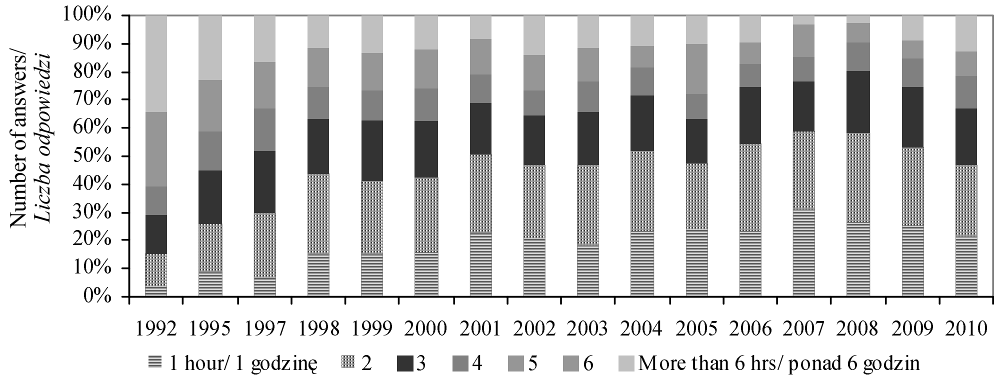

Figure 4. Number of hours devoted for shopping per week
Rysunek 4. Liczba godzin przeznaczanych tygodniowo na dokonywanie zakupów
Source: see fig. 1
Źródło: jak na rys. 1

Just like in the previous years, in 2010, the Poles most frequently did their shopping on Fridays and Saturdays (Fig. 5). More than one-third of the respondents do not have a specific day when they go shopping (8% do the same shopping every day, and 30% do their shopping when they need something). Only every fiftieth Pole declares that he/she decides to do the major shopping on Sunday.

Starting with 2003, there has been a systematic growth in the number of consumers for whom promotions were a sufficient motivator to go shopping [Reinhard 2009]. Invariably since 2001, the most favorite type of promotions have been price discounts and the possibility to receive more goods for the same price. The chains of the super- and hypermarkets have been expanding yearly and there are more and more Poles who look favorably upon those stores. Since 2001, the number of the supporters increased from the level of 30% to 49% in 2010, and the number of the adversaries of the big stores dropped from 29% in 2001 to 14% in 2010 (Fig. 6).

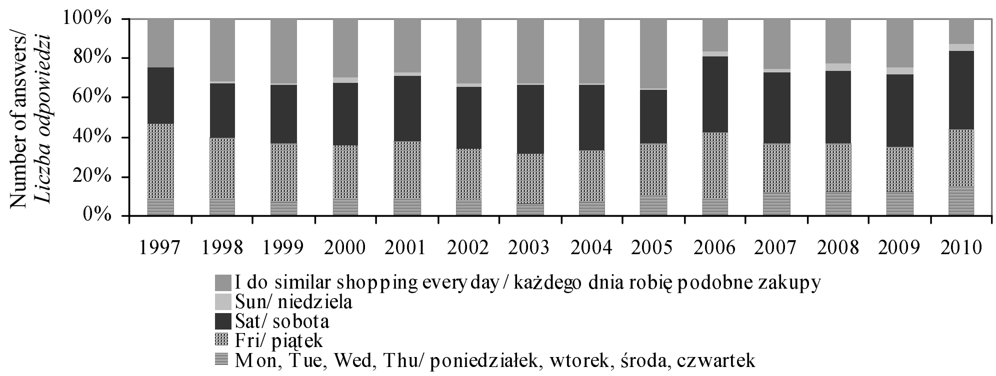

Figure 5. Days, when the major shopping is usually done
Rysunek 5. Dni, w których zwyczajowo dokonywane są największe zakupy
Source: see fig. 1
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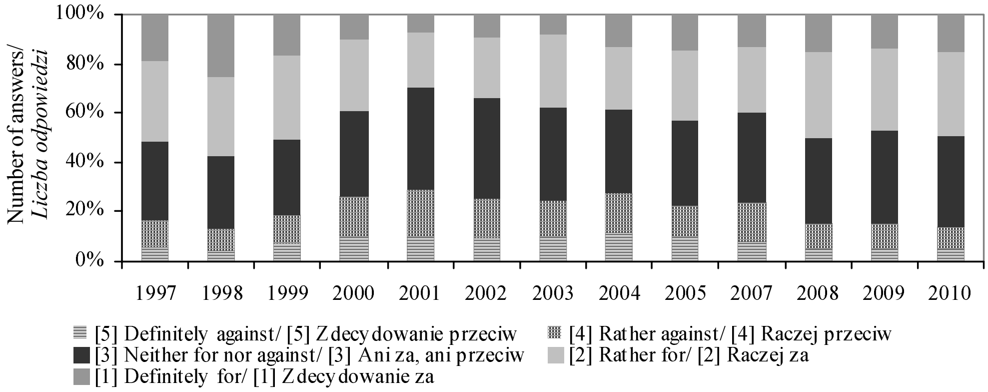

Figure 6. Support for the development of the supermarket chains
Rysunek 6. Poparcie dla rozwoju sieci supermarketów
Source: see fig. 1
Źródło: jak na rys. 1

Conclusions

1. Because of the diversified and rich supply, everyday products are most willingly bought at self-service stores and supermarkets. The determinants for the selection of the place for doing the shopping remained unchanged in the past decade.
2. We can observe a decreasing trend as regards the time spent weekly for shopping. More and more consumers of the everyday-use products buy them once a week.
3. The consumers have become more demanding which motivated the manufacturers, suppliers and distributors to increase the quality of the provided services and products. The suppliers and manufacturers are required to broaden their portfolio by products from the economy group.
4. We can see a growing trend among the number of people who spend the whole or the greater part of the sum devoted for shopping in self-service stores. Those consumers who spend the whole or the most of the sum devoted for shopping in stores where the merchandise is given by a clerk are in minority.
5. There is a systematic increase in the number of consumers for whom promotions were a sufficient motivator for going shopping.

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Streszczenie

W artykule przedstawiono wyniki badań nad zwyczajami zakupowymi polskich konsumentów i ich zmianami w ostatniej dekadzie. Omówiono trendy w upodobaniach i przyzwyczajeniach polskich konsumentów. Rozpoznano przeobrażenia procesu zakupu dóbr szybko zbywalnych oraz zmiany w opiniach i preferencjach nabywczych konsumentów w latach 2001-2010 ze względu na wiek, poziom wykształcenia oraz płeć respondentów.

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