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RETAIL NETWORKS AS A PLACE OF PURCHASE – THE EXAMPLE OF LARGE CITIES IN POLAND

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ABSTRACT

The article presents the results of the study investigating the purchasing behaviour of the residents of six large Polish cities (Warsaw, Wrocław, Katowice, Poznań, Białystok, and Gdańsk). Specifically, the study concentrates on the consumer shopping preferences with regard to grocery retail chains, pointing to the general differences and similarities, as well as gender- and age-specific tendencies. The study was conducted between 2016 and 2017 among 1970 respondents. This article also presents data from various reports of the research institutions from Poland and Europe: PMR, Nielsen, Ronald Berger, Euromonitor International, GfK Polonia. Despite problems with their comparability, they multidimensionally reflect the discussed issues that relate to the functioning of Polish retail trade, and they indirectly point to the purchasing behaviour of residents of Polish cities.

Key words: consumer buying behaviour, retail chains, shopping in retail chains

JEL codes: D02, L81, F18

INTRODUCTION

The aim of the article is to present a comparative analysis of shopping preferences with regard to retail food chains located in six large Polish cities. This article presents research results from own empirical study, as well as from various reports published by research institutions located in Poland and other European countries. These are for example: PMR, Nielsen, Ronald Berger, Euromonitor International, and GfK Polonia. Despite the problems with their comparability, they multidimensionally reflect different issues with regard to Polish retail trade and they indirectly indicate consumers' purchasing behaviors.

Own empirical study, which was conducted between 2016 and 2017 among 1970 residents of six large Polish cities (Warsaw, Wrocław, Gdańsk, Poznań, Białystok, and Katowice), adds to the literature in the field, by presenting both cross-city comparisons, as well as gender- and age-specific findings.

The dynamic development of Polish trade in the 21st century is mainly characterized by the dynamic development of different forms of sales and the changes in the number of retail chain stores in the FMCG retail trade characterized by [Karasiewicz and Nowak 2010, Reinartz et al. 2011, Karasiewcz and Trojanowski 2016]:

– diversity of store formats and their availability,
– a decrease in the number of retail stores due to the systematically decreasing number of traditional stores, including traditional grocery stores (Table 1),
– a systematic increase in the number of discount stores and convenience stores, as well as the level of sales value (Tables 2, 3),
– a changing value structure of the market share of individual store formats.

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These changes are also a derivative of changes in global retail, and in consumers' buying behavior, who prefer to buy goods quickly, conveniently, easily, for lower price, and with good quality [Kalyanam et al. 2006, Anitsal and Anitsal 2011, Raport Zakupy przyszłości 2017]. Such tendencies are confirmed by the results of the survey studies which report that Polish consumers in their everyday shopping value the quality of the product (77.7%), price (74.3%), ecological values of the product (27.4%), and place of origin of the product (20.7%) [Teraz Polska... 2018]. These expectations are met, in their opinion, by competing discount and convenience store chains [Kucharska et al. 2015]. In the case of Poland, the growth of the importance and increased financial performance of such stores has been also affected by the ban on Sunday trading. It activated these stores to use more appealing forms of sales promotion in the final days of the week and to increase communication frequency with their consumers. It should be also added here that according to the Global Powers of Retailing study that has been conducted since 2018, up to 90% of purchases in the world are made physically in traditional stores (brick and mortar retailers). On the other hand, different studies have shown that, on average, from 1 dollar spent in traditional stores, 56 cents is the effect of various types of virtual interactions that take place during the purchasing process [Global Powers of Retailing 2018]. The report "Global Convenience Retailing" by Planet Retail RNG also predicts that in the next five years convenience chains will be among the fastest growing in terms of value of revenues, giving way only to discount stores. At the same time, authors of the report indicate that this growth will be at the level of almost 5% (in discount stores of almost 6%), while at the same time the increase in online food sales is expected to exceed 17%.

Tables 2 and 3 illustrate the changes in the form of various revenue-shapes, and the value shares of those stores in Polish retail market. It can be observed that

Table 1. Number of retail stores in Poland in 2012–2018 (thousand)

Type / Year	2012	2013	2014	2015	2016	2017	2018
Stores total	318	312	304.3	298.3	283.3	271.3	262.4
Grocery stores	151	145	141.9	137.7	134.0	127.3	119.1
Traditional store	119	111	103	98	91	83	78
The value of sales in retail trade in billion PLN	219.4	220.6	224.6	227.8	231.3	241.3	251.5

Source: W Polsce działa... [2018].

Table 2. FMCG retail stores by operational formats – valuable market shares (%)

Type / Year	2012	2013	2014	2015	2016	2017	2018*	2019*	2020*
Hypermarkets	13	13	12	11	11	11	10	10	10
Supermarkets	20	21	22	22	23	24	25	25	25
Discount stores	19	21	23	24	26	27	28	29	30
Convenience stores	2	3	3	4	4	5	6	6	6
Traditional franchise stores	9	10	11	11	11	12	12	13	13
Traditional stores	31	27	23	21	18	15	13	11	9
Other	6	6	6	6	6	6	6	6	6

* forecast
Source: W Polsce działa... [2018].

Table 3. Retail trade turnover in Poland by format (billion PLN)

Type / Year	2012	2013	2014	2015	2016	2017	2018*	2019*	2020*
Hypermarkets	32	33	34	33	33	33	33	33	33
Supermarkets	27	28	29	31	32	34	36	37	38
Discount stores	41	47	51	55	58	64	68	71	75
Convenience stores	11	12	15	16	18	21	23	26	29
Traditional franchise stores	28	29	32	35	38	40	42	42	43
Traditional stores	53	49	44	41	39	38	36	35	34

Source: Roland Berger, Polski rynek handlu spożywczego 2010–2020, 2016.

the revenues of discount chains are systematically growing, while the turnover of traditional stores is falling down.

The growing importance of discount stores is particularly visible in recent years, when after a period of stagnation, the increase in the number of such stores and their share in the overall retail stores is common (Fig. 1). Such trends derive from very attractive price offers, high quality of offered food products, and a convenient location and conditions for shopping [Chan et al. 2011]. This is particularly visible and appreciated by consumers in large cities.

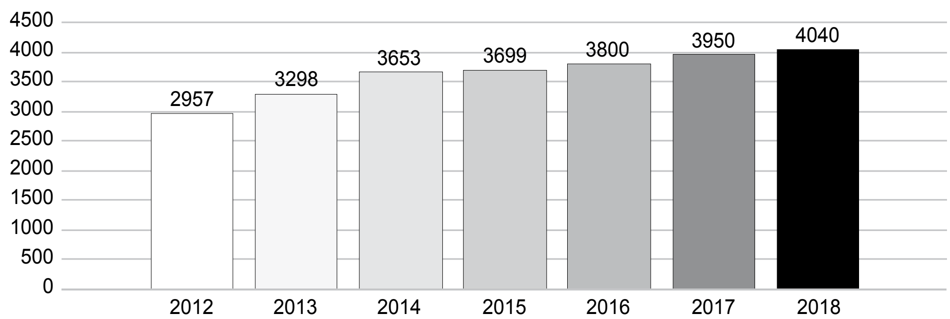

Fig. 1. The number of discount stores in Poland in 2012–2018

Source: Roland Berger, Polski rynek handlu spożywczego 2010–2020, 2016, Lista 500, Rzeczpospolita 2013–2018; DGP 11.01.2017 nr 11.

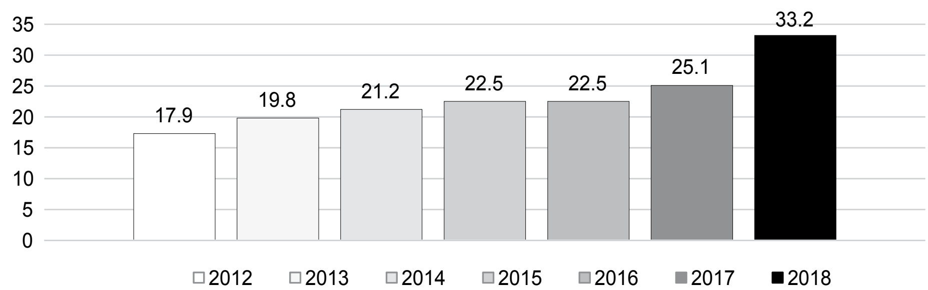

Fig. 2. The share of discounters in retail sales in 2012–2018

Source: Roland Berger, Polski rynek handlu spożywczego 2010–2020, 2016, Lista 500, Rzeczpospolita 2013–2018; DGP 11.01.2017 nr 11.

The analysis of the purchase preferences in retail chains in large cities in Poland

The article presents the results of a study that examined purchase preferences in the retail food chains reported by residents of large cities in Poland. The research was carried out by the Product Marketing Department of the Poznan University of Economics and Business between 2016 and 2017, among residents of six selected cities. The research method used was direct interview technique with a quota selection of the research unit that included: gender, age and place of residence – district (Wrocław, Gdańsk, Białystok in 2016 and Warsaw, Poznań, Katowice in 2017). Sample size for each of the cities ranged from 320 to 450 people. IBM SPSS Statistics ver. 22 was used to analyze the research data. In each of the tests, an identical measurement instrument was used – a categorized interview questionnaire. The article presents the results of the purchase preferences with regard to retail food store chains. Both general cross-city comparisons are presented, as well as the analysis of the gender- and age-specific variances.

Table 4. Purchase preferences in retail networks in various cities in total

Retail networks	Warszawa	Gdańsk	Wrocław	Białystok	Poznań	Katowice
	% of responses					
Biedronka	50	38	64	69	66	49
Tesco	30	45	36	6	50	36
Lidl	15	40	47	40	21	41
Carrefour	14	21	11	14	–	12
Top Market	13	–	–	–	–	–
Auchan	13	–	13	31	11	18
Żabka	11	23	10	5	17	9
Simply Market	7	–	–	–	–	–
Leclerc	5	–	10	–	–	–
Fresh Market	5	7	–	–	–	–
Kaufland	–	–	17	–	8	11
Sklepy osiedlowe	–	–	11	–	–	–
Real	–	4	8	–	–	22
Stokrotka	–	–	–	27	–	–
Lewiatan	–	–	–	19	–	9
Pss Społem	–	–	–	10	–	–
Piotr i Paweł	–	5	–	5	26	–
Netto	–	30	–	–	12	–
Intermarche	–	1	–	–	–	–
Aldi	–	–	–	–	–	11
Chata Polska	–	–	–	–	5	–

Source: own research.

Among the retail food chains that have been identified in all studied cities (which are: Biedronka, Tesco, Lidl, and Żabka), Biedronka was the most popular place of purchase. It is the most frequently indicated place of purchase by residents of Warsaw (50% of responses), Wrocław (64% of responses), Bialystok (69% responses), Poznan (66% of responses), and Katowice (49% responses). Only residents of Gdańsk declared that the most popular network is Tesco (45% responses), followed by Lidl (40% of the responses), and Biedronka (38% responses). The high position of Biedronka in most of the studied cities, results from the growing popularity of discount stores as a place to shop, and from the dynamic growth of this network, which in 2018 grew to the number of 2820 stores in Poland [Biedronka ma już... 2019].

The Lidl network is second most often indicated food retail chain in Wrocław, Katowice (47% and 41% responses); it is slightly less popular in Poznań and Warsaw (21% and 15% responses). In Warsaw and Poznań, the second most visited retail network is Tesco (30% and 50% responses). Interestingly – compared to other cities, this network is not very popular in Bialystok – only 6% of residents declare shopping there, and the Auchan network (31% responses) and the Stokrotka network (27% responses) are definitely more popular in this location, which is contrary to choices made in other studied cities.

In the case of the city of Poznań, the top three of the most popular retail chains include Piotr i Paweł (26% of responses), which commenced operations in 1990 in Poznań and is strongly associated with this city (despite nationwide coverage). On the other hand, in the case of Warsaw residents, the preferences for shopping in retail networks (apart from the most popular Biedronka chain) are at a similar level for Lidl, Carrefour, Top Market and Żabka chains (15%, 14%, 13%, 13%, 11% of responses respectively).

The third most popular grocery retail convenience store in analyzed cities is the retail chain named Żabka. The analysis of the responses of the residents of the studied cities, indicates that the Żabka network enjoys the greatest popularity among the residents of Gdańsk (23% of responses) and Poznań (17% of responses), and the smallest – among residents of Białystok (5% of responses).

The city specific differences can be observed with regard to retail chains such as Netto, Kaufland, Stokrotka, Piotr i Paweł, and Real. These retail chains were mentioned only in individual cities. Namely, Netto was mentioned only in Gdańsk (30% of indications), Kaufland in Wrocław (17% of responses), Stokrotka in Białystok (27% of responses), Piotr i Paweł in Poznań (26% of responses), and Real in Katowice (22% of responses). The popularity of these networks often comes from their local character (which affects the emotional attachment of residents and their shopping preferences, as in the case of the Piotr i Paweł in Poznań), and also from a number of stores in a given network in the city (as in the case of the Stokrotka chain in Bialystok).

Gender-specific differences in shopping preferences with regard to grocery retail chains in large cities

The gender-specific research results that concern shopping preferences of residents of large cities with regard to the grocery retail chains are presented in Table 5.

The gender-specific analyses of the preferences of residents of big cities indicate mixed results. For example, the Biedronka network, the most popular retail chain in most cities, is relatively more popular among women than men in Warsaw, Wrocław, Poznań and Katowice (respectively 54% to 46%, 73% to 54%, 70% to 62% and 52% to 46% of responses). In Gdansk, the Biedronka chain is slightly more popular among men (a difference of 8. p.p.), while in Białystok, gender practically does not differentiate shopping preferences in this network (the difference between women and men is 1 p.p.).

In turn, when analyzing gender-specific results for the Tesco chain, it can be noticed that men living in Wrocław, Poznań and Katowice indicate higher preferences for this network when compared to women (respectively 41% to 31%, 23% to 19% and 38% to 34% of responses). However, in Gdańsk and Białystok, this network is slightly more popular among men (41% to 43% and 7% to 4%, respectively). In the case of Warsaw residents, the popularity of the Tesco chain among women and men is at a similar level (29% to 30% of responses).

Table 5. Preferences of residents of large cities in Poland and the gender of the respondents

Retail networks	Warszawa		Gdańsk		Wrocław		Białystok		Poznań		Katowice	
	% of responses											
	gender											
	K	M	K	M	K	M	K	M	K	M	K	M
Biedronka	54	46	36	42	73	54	69	70	70	62	52	46
Tesco	29	30	47	43	31	41	7	4	19	23	34	38
Lidl	16	14	41	38	51	43	40	40	48	52	41	40
Carrefour	13	15	21	20	7	16	15	12	–	–	14	10
Top Market	8	22	–	–	–	–	–	–	–	–	–	–
Auchan	14	12	–	–	13	14	34	28	11	11	17	19
Żabka	12	9	24	21	6	12	3	7	14	21	10	8
Simply Market	6	8	–	–	–	–	–	–	–	–	–	–
Leclerc	7	3	–	–	13	8	–	–	–	–	–	–
Fresh Market	5	5	8	7	–	–	–	–	–	–	–	–
Kaufland	–	–	–	–	15	19	–	–	9	8	12	9
Sklepy osiedlowe	–	–	–	–	12	10	–	–	–	–	–	–
Real	–	–	5	4	10	7	–	–	–	–	18	26
Stokrotka	–	–	–	–	–	–	25	29	–	–	–	–
Lewiatan	–	–	–	–	–	–	20	17	–	–	11	6
PSS Społem	–	–	–	–	–	–	14	6	–	–	–	–
Piotr i Paweł	–	–	5	5	–	–	3	7	27	26	–	–
Netto	–	–	27	33	–	–	–	–	12	10	–	–
Intermarche	–	–	2	1	–	–	–	–	–	–	–	–
Aldi	–	–	–	–	–	–	–	–	–	–	8	15
Chata Polska	–	–	–	–	–	–	–	–	6	5	–	–

Source: own research

The analysis of gender-specific preferences with regard to the Lidl network shows that in the majority of studied cities (Warsaw, Gdańsk, Wrocław, Katowice) this network enjoys a relatively greater popularity among women than men – only in Poznań it is slightly more popular among men (52% to 48% of responses). Gender does not differentiate the popularity of the Lidl network in Białystok.

Similar results were achieved with regard to Żabka, another most often mentioned retail network. Żabka stores are more popular shopping destination for men in Wrocław, Białystok and Poznań (respectively 12% to 6%, 7% to 3% and 21% to 14% of responses). In turn, in Warsaw, Gdańsk and Katowice, Żabka network is slightly more popular among women (differences around 2–3 p.p.).

The gender-specific analyses also raise a question about the overall extent of differences between women and men. The smallest differences in preferences with regard to a chain choice between women and men is observed in Gdańsk (maximum 6 p.p. in the case of Biedronka) and Bialystok (also a maximum of 6 p.p. in the case of the Auchan network). In relation to other chains, the differences between women and men are insignificant. In turn, the largest differences in purchasing preferences between women and men are observed in Wrocław in the case of the Biedronka network, which is preferred by 73% of surveyed women and 54% of men (difference of 19 p.p.). The second biggest difference occurs in Warsaw, in relation to the Top Market network, which is popular among 22% of men and 8% of women (a difference of 14 p.p.).

Age-specific differences in shopping preferences with regard to grocery retail chains in large cities

Another interesting observations are made with regard to the extent to which residents' age differentiates preferences of consumers purchase. Respondents' preferences with respect to retail chains (Biedronka, Lidl, Tesco, Żabka) with regard to age are presented in Table 6.

The analysis of the data presented in Table 6 allows to formulate general conclusions regarding age differentiation of consumer preferences in relation to both specific chains and to the examined cities. When analyzing individual cities, it can be noticed that the preferences of consumers from separate age segments in relation to the Biedronka, Lidl, Tesco and Żabka networks are differentiated.

Respondents of 29 years old and younger indicated that the most popular network (out of four analyzed) is Biedronka, and those responses were observed regardless of the city studied (although the highest percentage of indications is observed in Białystok – 74%, Katowice – 67%, and Poznań – 64%). The least popular of the analyzed networks among respondents up to 29 years old is – depending on the city – Lidl (for Warsaw residents), Tesco (for residents of Białystok and Poznań) and Żabka (for residents of Gdańsk, Wrocław and Katowice).

On the other hand, when analyzing the segment of consumers aged 30–39 in terms of the most popular retail network, Biedronka was most popular among residents of Warsaw, Wrocław, Białystok, and Poznań; Biedronka and Tesco in the case of respondents from Gdańsk; and Tesco among residents of Katowice. Respondents of this age segment, least often indicated Żabka (regardless of the examined city), although the differences vary considerably (in Wrocław and Białystok only 3% of residents in the analyzed segment prefer this network, in Gdańsk as much as 23%, and in Warsaw – 19%).

Residents aged 40–49, in most of the surveyed cities, prefer shopping in the Biedronka network (45–67%). Only the inhabitants of Gdańsk showed different attitudes – they mainly prefer the Tesco and Lidl chains (48% of responses). The Żabka chain is the least popular within this segment of consumers (this is especially visible in the case of respondents from Wrocław, Katowice or Warsaw), and – interestingly – the Biedronka network achieved the same results among residents of Gdańsk. However, it should be noted that the percentage of indications in the analyzed category clearly differs – Biedronka from the four analyzed networks is the least popular in Gdańsk (27% of indications), and the Żabka network in Wrocław (2% of indications).

Analyzing the segment of consumers aged 50–59 with reference to four indicated and analyzed retail chains, it can be observed that - as in the case of other consumer's segments – Biedronka is the most popular in most of the studied cities (in Warsaw, Wrocław, Białystok, Poznań). For the residents of the of Gdańsk and Katowice, the most popular network is Tesco. In turn, the least popular network (from four analyzed), is Żabka, although similarly to the previous age segment, the values are clearly differentiated. In the case of Warsaw residents, none of the consumers of the analyzed age segment indicated this network, and in Gdańsk as many as 20% of respondents prefer this network (even though it is the least popular).

In the segment of senior consumers (60+) – as in the case of other segments – in most of the examined cities – the Biedronka network (Warsaw, Wrocław, Białystok, Katowice, Poznań) enjoys the greatest popularity. Only in Gdańsk, this consumer segment prefers much more the Tesco network. The least preferred network, regardless of the city studied, is Żabka.

Table 6. Preferences in terms of retail chains residents of large cities in Poland and the age of the respondents (% of responses)

Retail networks	Age				
	>29 years	30–39 years	40–49 years	50–59 years	60+
			Warszawa		
Biedronka	36	56	55	50	53
Tesco	9	18	50	47	37
Lidl	11	19	13	11	17
Żabka	15	19	5	0	9
			Gdańsk		
Biedronka	38	39	27	38	44
Tesco	27	39	48	61	49
Lidl	40	37	48	35	40
Żabka	26	23	33	20	17
			Wrocław		
Biedronka	62	63	67	56	71
Tesco	52	37	43	40	18
Lidl	47	54	62	56	30
Żabka	18	3	2	8	10
			Białystok		
Biedronka	74	68	65	77	65
Tesco	5	4	7	8	6
Lidl	38	47	43	35	38
Żabka	10	3	7	2	0
			Poznań		
Biedronka	65	61	52	58	75
Tesco	16	31	18	14	20
Lidl	61	46	55	39	44
Żabka	26	16	11	13	14
			Katowice		
Biedronka	67	43	45	41	44
Tesco	39	48	42	44	33
Lidl	46	32	25	41	31
Żabka	13	6	9	11	5

Source: own research.

SUMMARY

The research results conducted among residents of selected large cities in Poland, in the context of their preferences in relation to retail food chains, allow to formulate key conclusions [Wrzesińska-Kowal 2016]. Out of all analyzed chains, four are the most preferred networks among residents of all cities – these are: the Biedronka, Lidl, Tesco, and Żabka. Such results might be a consequence of the wide availability of these networks in the examined large cities, and their dynamic expansion (especially with regard to Biedronka, Lidl, and Żabka). As far as all the indicated retail chains are concerned, the most popular in majority of cities is Biedronka, followed by Tesco and Lidl. Interestingly, in the studied cities, consumer preferences are strongly interconnected with local brands that originate from these cities [Dimitrova et al. 2016]. This note applies to the city of Poznań and two chains – Piotr i Paweł, and Chata Polska, which both originated in Poznań, and to Białystok and Stokrotka chain which originated in Białystok. Gender-specific analyses show that generally gender does not differentiate consumer preferences with regard to retail chains, although some differences exist within specific networks. For example man prefer Top Market in Warsaw to much higher degree than women.

Much larger differences exist with regard to the age of the respondents. It is particularly visible with regard to the following chains – Biedronka, Lidl, Tesco and Żabka. The age-specific differences in shopping preferences in particular cities vary considerably.

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SIECI DETALICZNE JAKO MIEJSCE DOKONYWANIA ZAKUPÓW – NA PRZYKŁADZIE DUŻYCH MIAST W POLSCE

STRESZCZENIE

W artykule zaprezentowano wyniki badania weryfikującego zachowania nabywcze mieszkańców sześciu dużych polskich miast (Warszawy, Wrocławia, Katowic, Poznania, Białegostoku i Gdańska). W badaniu skoncentrowano się szczególności na preferencjach zakupowych konsumentów w odniesieniu do sieci sklepów spożywczych, wskazując na ogólne różnice i podobieństwa, a także tendencje związane z płcią i wiekiem. Badanie przeprowadzono w latach 2016–2017 wśród 1970 respondentów. W artykule zaprezentowano również dane z różnych raportów instytucji badawczych z Polski i Europy: PMR. Nielsen, Ronald Berger, Euromonitor International, GfK Polonia. Pomimo problemów z ich porównywalnością odzwierciedlają omawiane zagadnienia związane z funkcjonowaniem polskiego handlu detalicznego i pośrednio wskazują na zachowania zakupowe mieszkańców polskich miast.

Słowa kluczowe: zachowania nabywcze konsumentów, sieci handlowe, zakupy w sieciach handlowych