

CONSUMER PREFERENCES FOR COFFEE BRANDS AVAILABLE ON THE POLISH MARKET

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ABSTRACT

The article addresses the issue of consumer preferences for brands of coffee in Poland (for ground coffee, instant coffee, coffee beans and instant cappuccino). The main source of the study is the results of primary research conducted using a structured interview (CAPI – Computer Assisted Personal Interview) on a nationwide sample of 800 coffee consumers. The results of the research which have been included in the article indicate, among others, ongoing changes in the preferences of Polish consumers regarding their choice of coffee brands. The results show that brands offered by small, local manufacturers are of little significance on a national level in terms of brand awareness, consumption, and consequently sales. Branded products offered by large corporations such as Jacobs, Nescafe, Lavazza and Tchibo play a major role in the coffee market in Poland.

KEY WORDS

Consumer behaviour, consumer preferences, brand, coffee, research.

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Introduction

Consumption, which is an important aspect of consumer behaviour, has been the subject of continuous research interest in scientific circles for a number of years now (Maciejewski 2010, 2016; Mróz 2013; Klies-tikova and Janoskova 2017; Moravcikova et al. 2017). The main reason for this is the essence of the consumption phenomenon - that is, the process of meeting human needs which are not always fully defined, are varied in content and form, variable in time, and are dependent on a specific place, time or environment (Wróblewski and Mokrysz 2017). The history of consumer behaviour goes back to the beginnings of man, who has always felt needs

and satisfied them accordingly. Consumer behaviour research, on the other hand, is a relatively new field. The concept of “consumer behaviour” only began to appear on a large scale in Western literature in the mid-1960s, and in Poland in the late 1980s. Kaufman (1995: 39-45) defines consumer behaviour as “all human behaviour – at home, at work, in the shop or even on the street, wherever people think about shopping, where they purchase or use the purchased products”. The American Marketing Association defines consumer behaviour as a “dynamic interaction of affections (feelings), cognition, behaviour, and environmental variables by which people make

changes in different areas and aspects of their life. It is the actions, the behaviour of the consumer and the decision-maker in the market environment for products and services, which is usually described as an interdisciplinary field of research trying to understand and describe such behaviour” (Mokrysz 2016). Consumer behaviour, according to Solomon et al. (2006: 6), is the study of the processes involved when individuals or groups select, purchase, use or dispose of products, services, ideas or experiences to satisfy needs and desires. Kotler and Armstrong (2013: 435), define purchasing consumers' behaviour as “end consumer behaviour, who may be individuals and households that buy goods and services for personal consumption”. All these end consumers, according to Kotler et al. (1999: 229), together form the so-called consumer market.

In the twenty-first century, consumer behaviour (including the coffee market) is the subject of marketing research, which provides information about the needs (Oláh et al. 2017), preferences, conditions of the behaviour and attitudes of consumers towards the brand, product offer and the organisation (Kliestikova et al. 2017). These studies provide valuable knowledge about the methods of making purchases, motives for the market choices made, loyalty, price sensitivity, sensitivity to marketing or the perception of consumer decisions and, consequently, the acceptance of the company's offer. The conditions for providing satisfaction to consumers are the central position of consumers in the activities of a modern organisation, an astute and dynamic analysis of their conduct, research, anticipating demand, creating consumer needs and preferences, subordinating the businesses objectives and strategies to the demand for a particular consumer segment, and the application of full quality marketing. Researchers studying con-

sumer behaviour, who are representatives of various scientific fields, deal with various elements of these behaviours - from the decision-making process, through the influence of various factors on purchasing, consumer reactions to the product as an individual and as a family member or member of another group, or finally consumer feelings. Thus, consumer behaviour is not only a category, but also significant knowledge of the decisions of the organisation.

The research methodology for consumer behaviour on the market focuses on obtaining the primary and secondary information necessary to identify a complex web of phenomena and processes which are involved in making market choices, purchasing decisions, along with the procedure for preparing to make those decisions, and the effects thereof (Smyczek and Sowa 2005). The most frequently studied types of consumer behaviour include (Solomon 2006):

- the study of consumer needs and preferences,
- the study of consumer perception,
- the study of consumer behaviour (individual stages) and its determinants,
- the study of opinions and attitudes,
- the study of motifs of behaviour,
- the study of life styles and psychographics,
- the study of purchase intentions.

In companies oriented toward marketing, consumers are the centre of attention, and learning about their market behaviour and preferences is the starting point in the process of shaping the marketing strategy. Thanks to the right marketing strategy, an organisation can better adapt to its environment, which is a key element of strategic management. Source literature defines it as strategic alignment (Hatch 2002: 112-113; Pierścionek 2011: 9; Kaleta 2013: 109; Krupski 2014: 11; Romanowska 2017:

16-20; Oláh et al. 2018: 130). Therefore, this article focuses on the study of consumer preferences in the coffee market with regard to the brands of different types of coffee available on the Polish market.

1. Methodology of the research

Primary studies for this article were conducted using a structured CAPI (Computer Assisted Personal Interview). The aim of the studies was to find out more about consumer preferences for brands of different types of coffee in Poland. Due to the very large amount of information collected during the course of the study, this paper

is limited to presenting only selected research results for coffee beans, ground coffee, instant coffee and instant cappuccino. The following issues were subjected to a detailed diagnosis in the article:

- knowledge and use of the brands of coffee beans, ground coffee, instant coffee and cappuccino available in Poland;
- the preferences of Poles for particular brands of coffee beans, ground coffee, instant coffee and cappuccino.

The study was conducted in January 2016 on a group of 800 respondents from various parts of Poland. The population of respondents was diverse in terms of gender, age and education (Table 1).

Table 1. Characteristics of the test sample (N=800)

	Specification	Percentage of respondents
Sex	Female	53.0
	Male	47.0
Age	16-24 years	13.0
	25-34 years	26.0
	35-44 years	30.0
	45-55 years	31.0
Education	Primary/vocational	33.0
	Secondary	40.0
	Higher	27.0
Net household income	Less than PLN 3000	14.0
	PLN 3001 – PLN 5000	25.0
	PLN 5001 – PLN 7000	14.0
	Over PLN 7000	3.0
	I don't know/refusal	44.0
Place of residence	Rural areas	39.0
	Town up to 49,000 residents	17.0
	Town from 50,000 to 199,000 residents	22.0
	Town with more than 200,000 residents	22.0

Source: Own elaboration.

The group of respondents was composed of coffee consumers aged from 16 to 55. The sample was selected in a targeted manner among those who reported at least occasional consumption of coffee or

coffee beverages. Basic information about the research conducted is presented in Table 2.

Table 2. Basic information about the research

Specification	Study
Research method	Standardised structured interview
Technique	Face-to-face, CAPI (Computer Assisted Personal Interview)
Average interview duration	50 minutes
Research tool	IQS platform: http://researchsolutions.grupaiqs.pl/
Definition of the sample	Nationwide sample of consumers of coffee and coffee beverages, people aged 18-55
Sample size	N=800
Spatial extent of research	Territory of Poland
Duration of research	January 2016

Source: Own elaboration.

Moving on to the main part of the analysis, after the characterisation of the studied population, it should be noted that the data obtained on the basis of the research imparts knowledge about the views of the respondents regarding the preferred types of coffee and coffee brands, and not the actual status in this regard. However, we should take into account the large size of the research sample, as well as the integrity and good will of the respondents.

2. Consumer preferences for brands of coffee beans

Roasted coffee beans, after grinding, release an intense flavour and aroma. The main types of coffee grown around the world are Arabica, Robusta and Liberica (Gonzalez-Perez and Gutierrez-Viana 2012). Arabica is considered the noblest variety of coffee, requiring better soil and better sunlight than Robusta. Its beans

give a mild and slightly acidic flavour. They represent almost 70% of the world's coffee. Robusta has an intense, strongly palatable taste. Some varieties can even have a spicy flavour. Robusta has more caffeine than Arabica and is simply too flavourful for most coffee drinkers. Liberica is the least aromatic coffee of all, but it produces more yield and is more resistant to pests. Liberica is grown in Ceylon, Madagascar, Java, and Africa (Gonzalez-Perez and Gutierrez-Viana 2012; Nuševa et al. 2017).

The answers given by the respondents allowed the researchers to gain an insight into knowledge of brands of coffee beans in Poland. In the first place, the respondents were asked to specify the brands of coffee beans they were aware of (spontaneous knowledge), and then they were asked to mark the brands of coffee beans they were aware of on a list (assisted knowledge). The responses obtained are presented in Table 3.

Table 3. Knowledge of brands of coffee beans in Poland (%)

Brand of coffee beans	Spontaneous knowledge		Assisted knowledge
	First indicated	All indicated	
Jacobs Kronung	21.0	34.0	53.0
Tchibo Exclusive	7.0	23.0	41.0
Lavazza	12.0	21.0	37.0
Prima	7.0	16.0	32.0
Woseba	3.0	12.0	32.0
Mk Cafe	4.0	14.0	30.0

Astra	3.0	6.0	16.0
Dallmayr	1.0	4.0	12.0
Segafredo	1.0	6.0	12.0
Douwe Egberts	2.0	4.0	11.0
Marila Cafe Crema	1.0	1.0	5.0
Pellini	-	1.0	4.0
Crema Delicado – Marila	0.0	1.0	2.0
Crema Intensa – Marila	0.0	1.0	2.0
Mokate Caffetteria Coffee	0.0	1.0	2.0
Selected	0.0	1.0	1.0
Other	-	-	-
None	37.0	37.0	26.0

Source: Own elaboration.

According to the research, Jacobs Kronung is the most recognisable brand of coffee beans in Poland (the brand was mentioned first by 21% of respondents, and was recognised by 53% by means of assisted knowledge). In the course of fur-

ther research, however, it turned out that Jacobs Kronung is behind Lavazza in Poland in terms of consumption. According to respondents, Lavazza is most commonly consumed, while Jacobs Kronung is in second place (Table 4).

Table 4. Brands of coffee beans used in Poland (%)

Brand of coffee beans	Ever used	Used in the last 12 months	Used in the last 3 months	Used most often
Lavazza	15.0	7.0	5.0	5.0
Jacobs Kronung	20.0	7.0	5.0	4.0
Tchibo Exclusive	12.0	3.0	3.0	2.0
Prima	9.0	3.0	3.0	2.0
Mk Cafe	6.0	3.0	2.0	2.0
Woseba	5.0	1.0	1.0	1.0
Segafredo	4.0	2.0	1.0	1.0
Dallmayr	3.0	1.0	1.0	1.0
Astra	3.0	1.0	1.0	1.0
Pellini	1.0	1.0	0.0	0.0
Marila Cafe Crema	1.0	0.0	0.0	0.0
Douwe Egbert's	2.0	0.0	0.0	-

Source: Own elaboration.

Another research issue which was raised concerned consumers' preferences for brands of coffee beans in Poland. The respondents were asked to choose state-

ments from a list that best described how willingly they would buy a given brand of coffee beans (Table 5).

Table 5. Preferences for brands of coffee beans in Poland (%)

Brand of coffee beans	1	2	3	4	5	N=
Lavazza	18.0	36.0	26.0	13.0	6.0	119
Dallmayr	19.0	35.0	19.0	27.0	0.0	26
Jacobs Kronung	13.0	26.0	22.0	29.0	10.0	159

Mk café	12.0	20.0	32.0	24.0	12.0	50
Astra	12.0	20.0	32.0	32.0	4.0	25
Tchibo Exclusive	7.0	24.0	29.0	33.0	6.0	94
Prima	14.0	15.0	25.0	35.0	10.0	71
Segafredo	11.0	18.0	46.0	25.0	0.0	28
Woseba	8.0	13.0	31.0	38.0	10.0	39

1. This is the only brand I would take into account.
2. I prefer it to others, but it is not the only brand I buy.
3. This is one of the brands I buy, but not my favourite.
4. This is not the brand I normally buy, but I could buy it under certain circumstances.
5. I would never buy this brand.

Source: Own elaboration.

The data presented in Table 5 shows that the most preferred brands of coffee beans in Poland are Dallmayr, Lavazza, Prima and Jacobs Kronung. 19% of respondents said that Dallmayr is the only brand of coffee beans they would consider buying. The next brand on the list, Lavazza, was named in 18% of responses, Prima 14% and Jacobs Kronung 13%. As many as 36% of the respondents stated that they prefer to buy the Lavazza brand over other brands of coffee beans, but it is not the only brand they buy. It is also surprising that 46% of the respondents buy Segafredo coffee beans, despite the fact that it is not their favourite brand – perhaps its price is the decisive factor in choosing this coffee. A significant proportion (38%) of the respondents thought that, although they do not purchase Woseba coffee beans, they would be willing to do so in certain circumstances. At the same time, respondents stated that they would never buy Mk Cafe coffee beans (12% of responders).

3. Consumer preferences for ground coffee brands

The following part of the study focused on ground coffee, which is made when coffee beans are roasted and ground by the manufacturer. This type of coffee is prepared faster, but it is almost always of poorer quality than coffee beans. The answers given by respondents to the next question allowed the researchers to determine the depth of knowledge of ground coffee brands in Poland. Firstly, as in the case of coffee beans, the respondents were asked to specify brands of ground coffee which they were aware of (spontaneous knowledge), and then they were asked to mark the brands of ground coffee they were aware of on a list (assisted knowledge). The responses obtained are presented in Table 6.

Table 6. Knowledge of ground coffee brands in Poland (%)

Ground coffee brand	Spontaneous knowledge		Assisted knowledge
	First indicated	All indicated	
Jacobs Kronung	28.0	63.0	84.0
Tchibo Family	15.0	53.0	79.0
Prima	12.0	42.0	72.0
Tchibo Exclusive	4.0	30.0	65.0
Maxwell House	5.0	28.0	64.0
Pedros	4.0	20.0	54.0
Mk Cafe Premium	3.0	19.0	52.0
Woseba	1.0	16.0	52.0

Lavazza	5.0	17.0	45.0
Fort	7.0	17.0	44.0
Gala Ulubiona	3.0	12.0	41.0
Astra	5.0	12.0	32.0
Davidoff	3.0	9.0	31.0
Sati	-	3.0	18.0
Douwe Egberts	1.0	5.0	15.0
Dallmayr	1.0	5.0	14.0
Cafe Crema - Marila	-	1.0	4.0
Caffetteria Mokate	-	1.0	3.0
Other	1.0	1.0	1.0
None	3.0	3.0	2.0

Source: Own elaboration.

It turns out that the most recognisable brands of ground coffee in Poland are Jacobs Kronung (mentioned first by 28% of respondents, and recognised by 84% by means of assisted knowledge), Tchibo Family (15% and 79%, respectively) and

Prima (12% and 72%, respectively). In the course of further research, it turned out that the aforementioned brands of ground coffee certainly dominate, not only in terms of knowledge, but also consumption (Table 7).

Table 7. Brands of ground coffee used in Poland (%)

Brand of ground coffee	Ever used	Used in the last 12 months	Used in the last 3 months	Used most often
Jacobs Kronung	58.0	25.0	18.0	15.0
Tchibo Family	51.0	27.0	18.0	15.0
Prima	37.0	18.0	14.0	13.0
Tchibo Exclusive	33.0	8.0	4.0	3.0
Maxwell House	31.0	9.0	4.0	3.0
Pedros	19.0	4.0	2.0	1.0
Mk Cafe Premium	18.0	7.0	5.0	4.0
Lavazza	16.0	6.0	4.0	3.0
Woseba	14.0	4.0	2.0	2.0
Fort	13.0	2.0	1.0	1.0
Gala Ulubiona	12.0	2.0	1.0	1.0
Astra	10.0	3.0	2.0	1.0
Davidoff	5.0	1.0	-	-
Douwe Egberts	4.0	1.0	-	-
Dallmayr	3.0	1.0	1.0	1.0
Sati	3.0	-	-	-

Source: Own elaboration.

According to research, 15% of respondents drink Jacobs Kronung and Tchibo Family coffee most often. Prima is in third place, chosen most often by 13% of respondents. The brands of ground coffee mentioned here

(Jacobs Kronung, Tchibo Family, Prima) were also purchased most frequently by the respondents at any time in the past (respectively 58%, 51% and 37% of respondents), during the last 12 months (25%, 27% and 18%) and

during the last three months (18%, 18%, 14%). In further research, the respondents were asked to choose statements from a list that

best describe how willingly they would buy a given brand of ground coffee. The results are presented in Table 8.

Table 8. Preferences for brands of ground coffee in Poland (%)

Brand of ground coffee	1	2	3	4	5	N=
Jacobs Kronung	18.0	27.0	25.0	26.0	4.0	447
Tchibo Family	15.0	28.0	23.0	28.0	6.0	410
Prima	25.0	17.0	22.0	31.0	5.0	298
Mk Cafe Premium	13.0	21.0	22.0	37.0	7.0	141
Maxwell House	5.0	20.0	26.0	44.0	4.0	247
Lavazza	11.0	33.0	19.0	29.0	7.0	129
Tchibo Exclusive	5.0	23.0	28.0	37.0	6.0	266
Woseba	8.0	17.0	29.0	36.0	9.0	110
Fort	5.0	15.0	30.0	36.0	14.0	100
Pedros	6.0	9.0	32.0	41.0	13.0	148
Astra	9.0	12.0	40.0	33.0	6.0	78
Gala Ulubiona	6.0	15.0	34.0	34.0	11.0	94
Dallmayr	22.0	22.0	30.0	26.0	-	23
Douwe Egberts	7.0	45.0	7.0	38.0	3.0	29
Davidoff	5.0	37.0	12.0	44.0	2.0	41
Sati	5.0	10.0	25.0	50.0	10.0	20

1. This is the only brand I would take into account.
2. I prefer it to others, but it is not the only brand I buy.
3. This is one of the brands I buy, but not my favourite.
4. This is not the brand I normally buy, but I could buy it under certain circumstances.
5. I would never buy this brand.

Source: Own elaboration.

The data presented in Table 9 shows that the most preferred brands of ground coffee in Poland are Prime, Dallmayr, Jacobs Kronung and Tchibo Family. 25% of respondents said that Prima is the only brand of ground coffee they would consider buying. The next brand, Dallmayr, was named in 22% of responses, Jacobs Kronung 18% and Tchibo Family 15%. As many as 45% of the respondents stated that they prefer to buy the Douwe Egberts brand over other brands of ground coffee, but it is not the only brand they buy. It is also surprising that 40% of respondents buy Astra ground coffee despite it not being their favourite brand. Exactly half of the respondents stated that, although they do not buy Sati ground coffee, they would be willing to buy it in some circumstances. At the same time, respondents stated that they

would never buy Ford instant coffee (14% of respondents), Pedros (13%) or Gala Ulubiona (11%).

4. Consumer preferences for instant coffee brands

Instant coffee is actually a coffee drink made from coffee extract. The instant version has 50% less caffeine than ground coffee. Production of the first Polish instant coffee (Marago) began in 1969. Initially, consumers were sceptical and this form of coffee was not very popular. In the 21st century, Poland is second in Europe in terms of the amount of instant coffee consumed, as only the British drink it more often than the Poles. The answers given by respondents to the next question allowed the researchers to gain an insight into consumer knowledge of

instant coffee brands in Poland. Firstly, the respondents were asked to specify the instant coffee brands which they were aware of (spontaneous knowledge), and then they

were asked to mark the instant coffee brands which they were aware of on a list (assisted knowledge). The responses are presented in Table 9.

Table 9. Knowledge of instant coffee brands in Poland (%)

Instant coffee brand	Spontaneous knowledge		Assisted knowledge
	First indicated	All indicated	
Nescafe Classic	33.0	62.0	82.0
Jacobs	30.0	54.0	75.0
Tchibo Family	6.0	31.0	58.0
Maxwell House	7.0	24.0	53.0
Nescafe Gold	4.0	17.0	49.0
Tchibo Exclusive	2.0	21.0	46.0
Prima	2.0	13.0	36.0
Nescafe Espresso	2.0	8.0	33.0
Mk Cafe Premium	2.0	10.0	33.0
Mokate	0.0	6.0	26.0
Pedros	1.0	8.0	25.0
Nescafe Sensazione	2.0	7.0	20.0
Nescafe Espiro	1.0	5.0	18.0
Davidoff	0.0	5.0	18.0
Astra	0.0	5.0	15.0
Douwe Egberts	1.0	3.0	13.0
Carte Noire	1.0	2.0	10.0
Mokate Every Day Classic	0.0	1.0	6.0
Caffetteria Mokate	0.0	1.0	4.0
Other	1.0	1.0	1.0
None	6.0	6.0	4.0

Source: Own elaboration.

The study shows that the most recognisable brands of instant coffee in Poland are Nescafe Classic (the brand was indicated first by 33% of respondents, and recognised by 82% by means of assisted knowledge), Jacobs (30/75%) and Tchibo

Family (6/58%). In the course of further research, it turned out that the abovementioned brands of instant coffee certainly dominate on the Polish market, not only in terms of knowledge, but also consumption (Table 10).

Table 10. Instant coffee brands used in Poland (%)

Instant coffee brand	Used at any time	Used in the last 12 months	Used in the last 3 months	Used most often
Nescafe Classic	53.0	31.0	22.0	20.0
Jacobs	43.0	23.0	17.0	15.0
Tchibo Family	27.0	10.0	6.0	5.0
Nescafe Gold	18.0	8.0	5.0	3.0
Nescafe Sensazione	9.0	4.0	3.0	2.0
Maxwell House	21.0	5.0	3.0	2.0
Tchibo Exclusive	18.0	4.0	2.0	1.0

Prima	10.0	2.0	1.0	1.0
Nescafe Espresso	8.0	3.0	2.0	1.0
Mk Cafe Premium	9.0	2.0	1.0	1.0
Carte Noire	3.0	1.0	1.0	1.0
Douwe Egberts	3.0	1.0	1.0	1.0
Mokate	8.0	1.0	1.0	0.0
Pedros	6.0	1.0	1.0	0.0
Davidoff	3.0	1.0	1.0	0.0
Nescafe Espiro	4.0	1.0	0.0	0.0
Astra	2.0	0.0	0.0	0.0
Mokate Every Day Classic	1.0	0.0	0.0	0.0

Source: Own elaboration.

According to the data presented in Table 10, 20% of the coffee consumers surveyed mostly drink Nescafe Classic coffee, and 15% Jacobs coffee. Tchibo Family is in third place, chosen most often by 5% of the respondents. Regarding the instant coffee brands mentioned (Nescafe Classic, Jacobs, Tchibo Family), the results are similar in terms of drinking it at any time (53/43/27% of respondents), during the

last 12 months (31/23/10%), and in the last three months (22/17/6%).

Another research issue which was raised concerned consumers' preferences for particular instant coffee brands in Poland. Respondents were asked to choose statements from a list that best described how willingly they would buy a given instant coffee brand. The results are presented in Table 11.

Table 11. Preferences for instant coffee brands in Poland (%)

Instant coffee brand	1	2	3	4	5	N=
Jacobs	23.0	30.0	22.0	20.0	4.0	344
Nescafe Classic	22.0	28.0	21.0	22.0	7.0	425
Douwe Egberts	14.0	36.0	18.0	32.0	0	22
Carte Noire	10.0	38.0	19.0	29.0	5.0	21
Nescafe Gold	8.0	36.0	29.0	23.0	4.0	146
Davidoff	11.0	26.0	15.0	48.0	0	27
Nescafe Sensazione	4.0	32.0	44.0	18.0	3.0	73
Tchibo Family	9.0	26.0	31.0	29.0	6.0	218
Nescafe Espresso	5.0	25.0	37.0	28.0	6.0	65
Tchibo Exclusive	5.0	23.0	34.0	33.0	5.0	146
Pedros	4.0	21.0	28.0	38.0	9.0	47
Mk Cafe Premium	6.0	20.0	32.0	31.0	11.0	71
Maxwell House	5.0	15.0	38.0	38.0	4.0	164
Prima	6.0	12.0	35.0	45.0	1.0	77
Nescafe Espiro	4.0	14.0	46.0	32.0	4.0	28
Mokate	5.0	7.0	31.0	49.0	8.0	61

1. This is the only brand I would take into account.
2. I prefer it to others, but it is not the only brand I buy.
3. This is one of the brands I buy, but not my favourite.
4. This is not the brand I normally buy, but I could buy it under certain circumstances.
5. I would never buy this brand.

Source: Own study based on research.

The data presented in Table 11 shows that the most preferred brands of instant coffee are Jacobs, Nescafe Classic and Douwe Egberts, with 23% of respondents saying that Jacobs is the only brand of instant coffee they would consider buying. Nescafe Classic received 22% of responses, and Douwe Egberts 14%. As many as 38% of the respondents stated that they prefer to buy the Carte Noire brand over other brands of instant coffee, but it is not the only brand they buy. It is also surprising that 46% of the respondents buy Nescafe Espiro instant coffee, despite the fact that it is not their favourite brand - perhaps price is the decisive factor in choosing this coffee. Nearly half of the respondents (49%) thought that, although they do not buy

Mokate instant coffee, they would be willing to buy it in some circumstances. At the same time, respondents stated that they would never buy Mk Cafe Premium instant coffee (11%) or Pedros (9%).

5. Consumer preferences for instant cappuccino brands

The final group of coffee types to be studied was instant cappuccino – a type of coffee beverage which is prepared at home. The answers given by respondents allowed the researchers to gain an insight into consumer knowledge of brands of instant cappuccino available in Poland. The responses obtained are presented in Table 12.

Table 12. Knowledge of instant cappuccino brands in Poland (%)

Brand of instant cappuccino	Spontaneous knowledge		Assisted knowledge
	First indicated	All indicated	
Mokate Cappuccino	24.0	31.0	50.0
Nescafe	10.0	18.0	33.0
Jacobs	8.0	11.0	25.0
Cappuccino Lidl	2.0	3.0	9.0
Gellwe	0.0	3.0	9.0
Caffetteria Mokate	2.0	3.0	8.0
Cappuccino Venezia	1.0	3.0	7.0
La Matina	1.0	2.0	5.0
La Movida	1.0	1.0	5.0
None	50.0	50.0	36.0

Source: Own elaboration.

This research shows that the most recognisable brand of coffee in Poland in the instant cappuccino group is Mokate Cappuccino - the definitive leader in the cappuccino group (the brand was first identified by 24% of respondents, and recognised by 50% by means of assisted knowl-

edge). In the course of further research, it turned out that Mokate Cappuccino is the coffee most frequently consumed by the respondents. This brand of cappuccino certainly dominates in Poland, not only in terms of familiarity, but also consumption (Table 13).

Table 13. Brands of instant cappuccino used in Poland (%)

Brand of instant cappuccino	Ever used	Used in the last 12 months	Used in the last 3 months	Used most often
Mokate Cappuccino	27.0	11.0	7.0	7.0
Nescafe	13.0	5.0	3.0	2.0

Jacobs	8.0	3.0	2.0	2.0
Cappuccino Lidl	3.0	1.0	1.0	1.0
Cappuccino Venezia	3.0	1.0	1.0	1.0
La Matina	1.0	1.0	1.0	1.0
La Movida	1.0	1.0	0.0	0.0

Source: Own study based on research.

The last research issue which was raised related to Polish consumers' preferences for particular brands of instant cappuccino. As with other types of coffee, the respon-

ents were asked to choose statements from a list that best described how willingly they would buy a given brand of cappuccino. The results are presented in Table 14.

Table 14. Preferences for brands of instant cappuccino in Poland (%)

Brand of instant cappuccino	1	2	3	4	5	N=
Mokate Cappuccino	12.0	45.0	24.0	12.0	8.0	85
Nescafe	24.0	31.0	10.0	21.0	13.0	303
Jacobs	5.0	48.0	19.0	19.0	10.0	21
Cappuccino Lidl	5.0	42.0	11.0	37.0	5.0	19
Gellwe	14.0	33.0	14.0	22.0	17.0	36
Cappuccino Venezia	12.0	34.0	27.0	18.0	10.0	143
Caffetteria Mokate	0.0	31.0	46.0	15.0	8.0	26

1. This is the only brand I would take into account.
2. I prefer it to others, but it is not the only brand I buy.
3. This is one of the brands I buy, but not my favourite.
4. This is not the brand I normally buy, but I could buy it under certain circumstances.
5. I would never buy this brand.

Source: Own elaboration.

Despite the dominance of the Mokate Cappuccino brand in the instant cappuccino segment, data from Table 14 shows that the most preferred brand of instant cappuccino in Poland is not Mokate Cappuccino but Nescafe: 24% of respondents opined that Nescafe the only brand of instant cappuccino they would take into consideration when purchasing. Mokate Cappuccino was only in third position (12%). As many as 48% of respondents stated that they prefer to buy the Jacobs brand over other brands of instant cappuccino, but it is not the only brand they buy. It also seems that 46% of respondents purchase Caffetteria Mokate instant cappuccino, despite it not being their favourite brand. A significant proportion (37%) of the respondents thought that, although they do not purchase Cappuccino Lidl instant cappuccino, in cer-

tain circumstances they would be willing to do so. At the same time, as many as 17% of respondents said they would never buy Gellwe instant cappuccino.

6. Discussion

According to research conducted by Nielsen, a research agency based in Warsaw, three coffee manufacturers dominated the Polish coffee market in 2015 and 2016: Jacobs Douwe Egberts, Tchibo and Nestle – the owner of the Nescafe brand, whose combined market share in 2016 exceeded 60% (Table 15).

Table 15. Leading coffee manufacturers in Poland according to their market share in 2016

No.	Coffee manufacturer	Quota share of the market (PLN millions)	Percentage share of the market
1	JACOBS DOUWE EGBERTS	969.06	29.13%
2	TCHIBO	526.01	15.81%
3	NESTLE	520.05	15.63%
4	PRIVATE LABEL	480.63	14.45%
5	STRAUSS GROUP	322.27	9.69%
6	WOSEBA	162.10	4.87%
7	LAVAZZA	94.26	2.83%
8	MOKATE	78.87	2.37%
9	DALLMAYR	56.89	1.71%
10	ASTRA	31.36	0.94%
11	MASSIMO ZANETTI	14.34	0.43%
12	SATI	10.06	0.30%
13	MAYORA	10.05	0.30%
14	SIDO	8.59	0.26%
15	PELLINI	3.89	0.12%
16	CAFE DO BRASIL	2.94	0.09%
17	PAMAPOL	2.56	0.08%
18	GULIS	2.36	0.07%
19	J.J. DARBOVEN	2.32	0.07%
20	COFFEE PROMOTION	2.10	0.06%
21	BIG ACTIVE	1.86	0.06%
22	CORSINI	1.85	0.06%
23	ILLY CAFFE	1.63	0.05%
24	CAFEA	1.54	0.05%
25	MINGES	1.48	0.04%
26	LITTLES	1.17	0.04%
27	FOODCARE	1.17	0.04%
28	INSTANTA	1.02	0.03%
29	CELIKO	0.91	0.03%
OTHER			0.39%
TOTAL			100%

Source: Own study based on data from research agency Nielsen MAT TY, from June 2015 to May 2016, Warsaw, June 2016.

The dominance of these three brands of coffee on the Polish market has also been confirmed by research designed by the authors of the study and carried out by the IQS group, the results of which are presented in this article. The brands of the three leading coffee manufacturers in

Poland, Jacobs, Tchibo and Nestle, are among the five leaders in the groups of coffee beans, ground coffee, instant coffee and cappuccino. Depending on the type of coffee, however, the brand which occupies the leading position is different (Table 16 and 17).

Table 16. Knowledge of coffee brands in Poland (spontaneous knowledge, first indicated brand)

Ranking	Brand of ground coffee	Instant coffee brand	Brand of coffee beans	Brand of instant cappuccino
1	Jacobs Kronung	Nescafe Classic	Jacobs Kronung	Mokate Cappuccino
2	Tchibo Family	Jacobs	Lavazza	Nescafe
3	Prima	Maxwell House	Tchibo Exclusive	Jacobs
4	Fort	Tchibo Family	Prima	Cappuccino Lidl
5	Maxwell House	Nescafe Gold	Mk Cafe	Caffetteria Mokate

Source: Own elaboration.

Table 17. Most commonly used coffee brands in Poland

Ranking	Brand of ground coffee	Instant coffee brand	Brand of coffee beans	Brand of instant cappuccino
1	Jacobs Kronung	Nescafe Classic	Lavazza	Mokate Cappuccino
2	Tchibo Family	Jacobs	Jacobs Kronung	Nescafe
3	Prima	Tchibo Family	Tchibo Exclusive	Jacobs
4	Mk Cafe Premium	Nescafe Gold	Prima	Cappuccino Lidl Cappuccino Venezia
5	Tchibo Exclusive	Maxwell House	Mk Cafe	La Matina

Source: Own elaboration.

The research shows that in the coffee beans group, the most popular coffees in Poland are the Jacobs Kronung, Lavazza and Tchibo Exclusive brands. However, Lavazza coffee beans are more commonly consumed than Jacobs Kronung and Tchibo Exclusive. In the ground coffee group, Jacobs Kronung, Tchibo Family and Prima lead both in terms of brand awareness and consumption. In the group of instant coffees, Nescafe Classic manufactured by Nestle, Jacobs and Maxwell House were most familiar to the respondents. The results of the study regarding instant coffee consumption were similar, the difference being that Tchibo Family was ranked third, higher than Maxwell House. In the instant cappuccino group, Mokate Cappuccino turned out to be the unquestioned leader in terms of both branding and consumption. Nescafe was ranked second and Jacobs third.

Conclusions

In conclusion, it can be stated that Poles drink a lot of coffee, although they are be-

hind Italians and Greeks in this respect. They mostly buy ground coffee and instant coffee from large brands such as Jacobs, Nescafe, Lavazza and Tchibo. Brands offered by small, local manufacturers are of little significance on a national level in terms of their awareness, consumption, and consequently sales (Cranfield et al. 2010; Hatch 2002; Hung 2012; Lee 2015). Branded products offered by large corporations play a major role in the coffee market in Poland.

Polish coffee consumers are especially loyal to their favourite brands of coffee beans and ground coffee, and perhaps even more so to their specific flavours. Coffee producers and distributors in Poland wanting to maintain or increase their market share are faced with a challenge. The requirements of Polish consumers are constantly growing and their taste is becoming more sophisticated, therefore product innovations introduced in the right way can be the answer. To distinguish their products on the market, coffee manufacturers and distributors in Poland should, for example, indicate the region where the coffee is grown

on the package, as this is crucial in order to inform customers about the exclusivity of their chosen coffee. They should provide details regarding the variety of beans and trees, as well as the exact area where they were harvested. In addition, they should offer information about the altitude at which the coffee was grown, making the customer aware of its significant effect on the flavour. Emphasising the natural beneficial properties of coffee or adding functional ingredients can be a way to attract new customers and increase market share. However, we must remember that innovation is difficult on the coffee market and consumers' habits regarding coffee types and brands change very slowly. This type of activity undertaken by the managers of companies which manufacture and distribute coffee is, however, a necessity – it is a good response to the growing interest of Poles in good quality coffee.

The results presented, although they are not the results of representative research, may provide an insight into consumer preferences for coffee types in Poland, as well as the differences and similarities in the preferences for types of coffee. They can be a very good starting point for more in-depth studies on a representative sample.

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