

TRM 2020

**SYNDICATED STUDY OF THE READERSHIP
OF TRADE PRESS IN RETAIL TRADE**

Report for Biuro Promocji i Reklamy „Generalczyk”

Nielsen Polska, Customized Intelligence

November 2020

RESULTS OF TRM 2020

ASSESSMENT OF THE PRINTED TRADE PRESS AS COMMUNICATION OF MANUFACTURES WITH RETAIL-TRADE

Do you find printed trade press an effective communication tool between manufactures and retail trade?

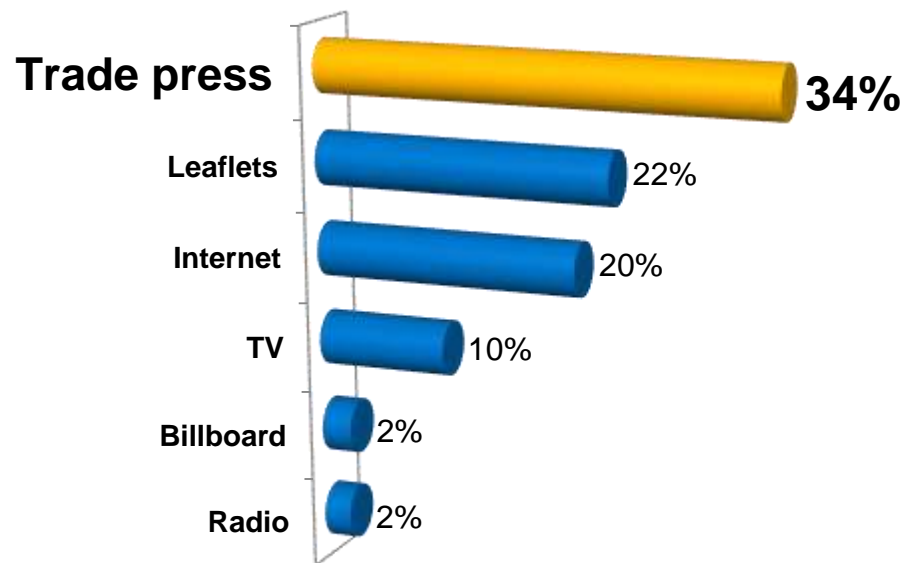


Standard error does not exceed 2 pp.

SOURCES OF INFORMATION HELPFUL IN PURCHASE DECISIONS FOR THE SHOPS SUPPLY – TRADE PRESS AMONG OTHER MEDIA

Which from the following sources of information helps you in taking purchase decision for the shop?

Total stores in Poland – persons receiving trade press N=784

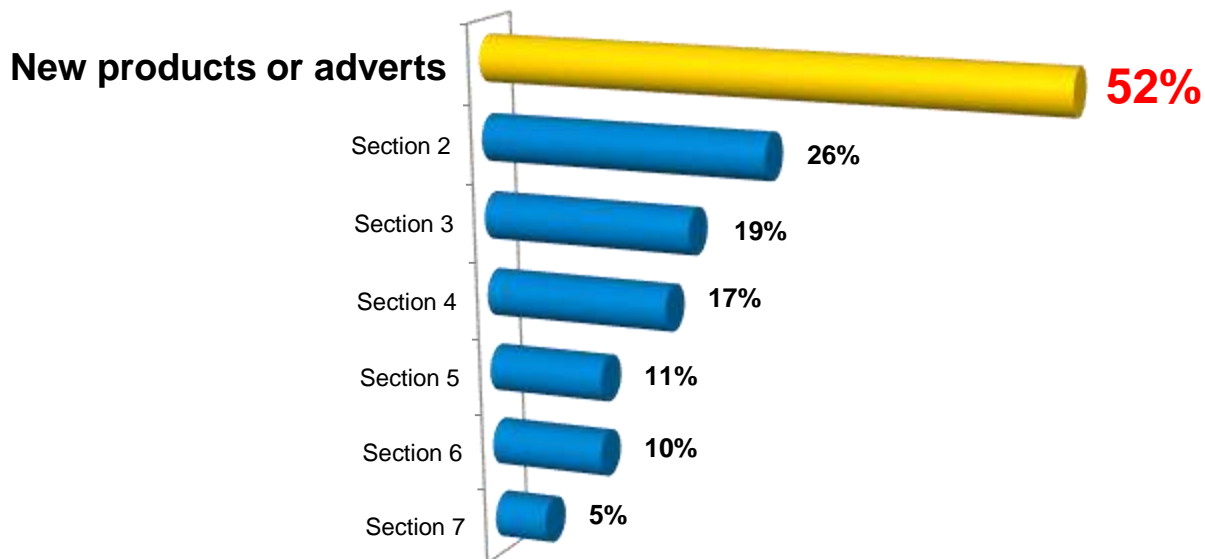


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USEFUL SECTIONS OF TRADE PRESS

Which sections of trade press are most useful in your work?

Total stores in Poland – persons receiving trade press N=784



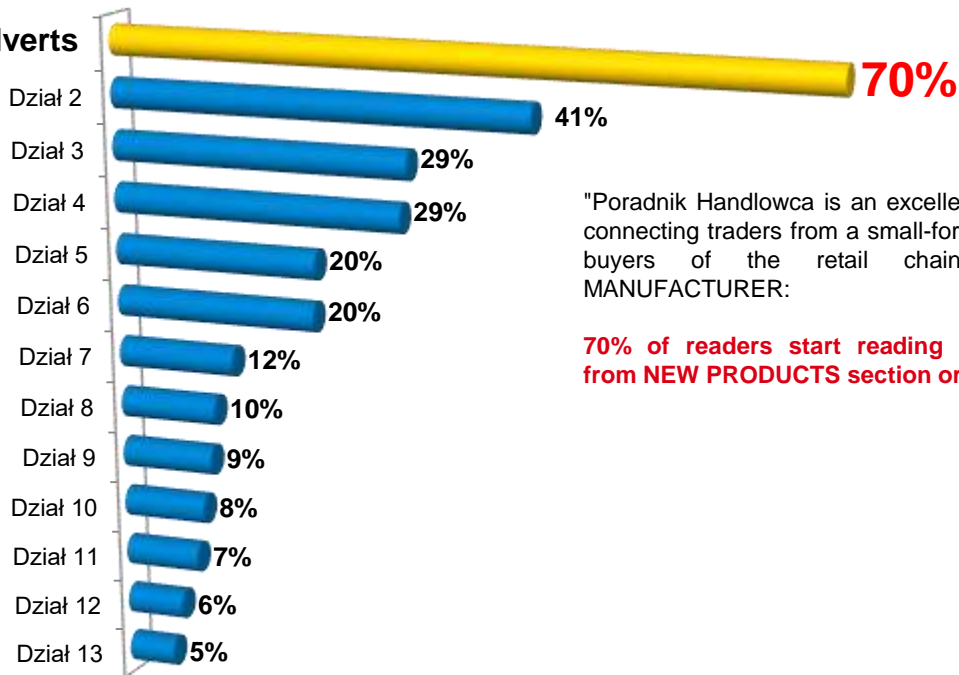
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READERSHIP OF PORADNIK HANDLOWCA CONTENT

From which section do you start to read „Poradnik Handlowca”?

Total stores in Poland,
readers of Poradnik Handlowca; N=458

New products or adverts



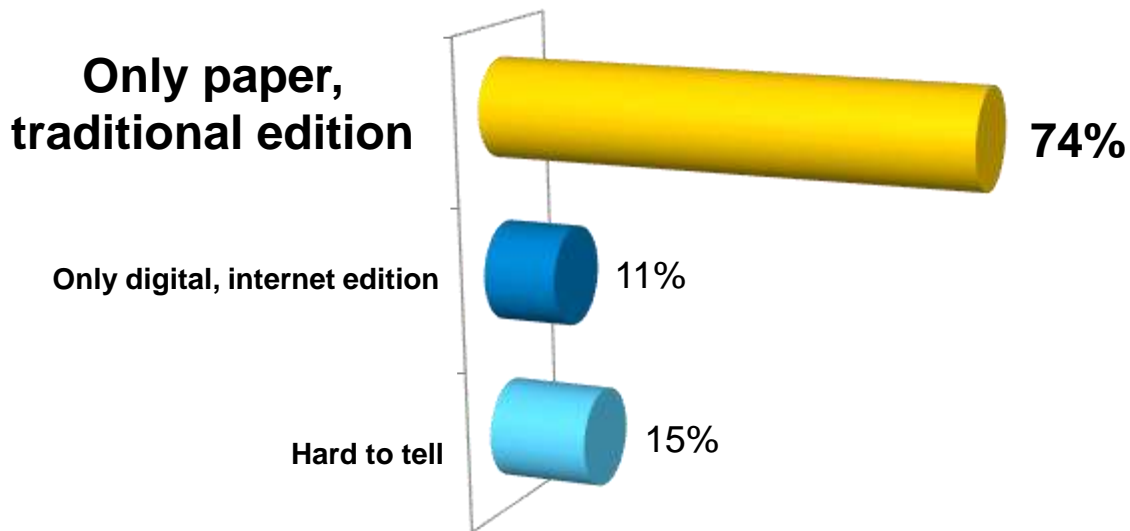
"Poradnik Handlowca is an excellent PLATFORM connecting traders from a small-format stores and buyers of the retail chains with the MANUFACTURER:

70% of readers start reading the magazine from NEW PRODUCTS section or ADVERTS"

PREFERRED EDITION OF TRADE PRESS

Which edition of all trade press titles do you prefer to get in store?

Total stores in Poland N=1006

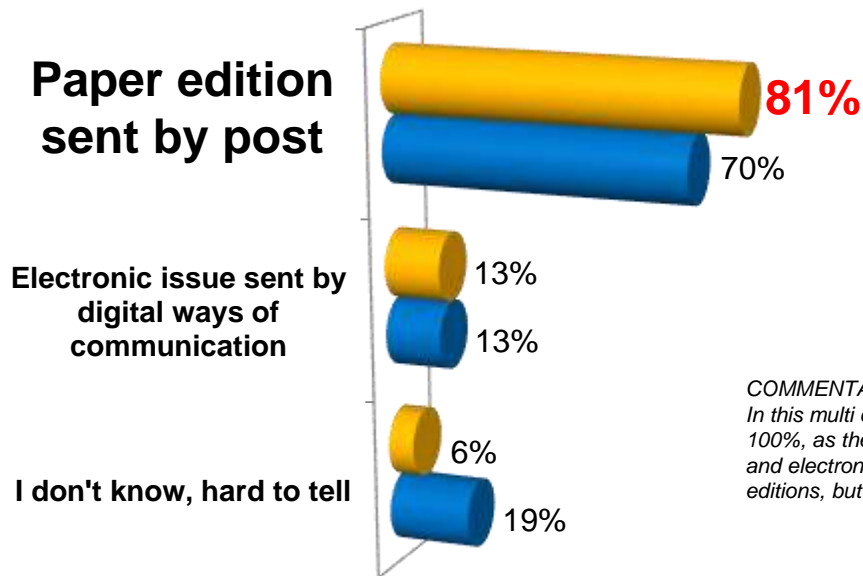


Standard error does not exceed 2 pp.

PREFERRED EDITION OF PORADNIK HANDLOWCA

Which edition of Poradnik Handlowca do you prefer to get?

Total stores in Poland N=1006



TRM 2020, N=1006

TRM 2019, N=1006

COMMENTARY:

*In this multi choice question, percentage does not total 100%, as the respondents could choose both paper edition and electronic edition. Some were eager to obtain both editions, but **the majority opted for paper edition.***

Bartłomiej Strączak
Client Business Partner
Sales Effectiveness
Nielsen Polska

TRADE PRESS AWARENESS

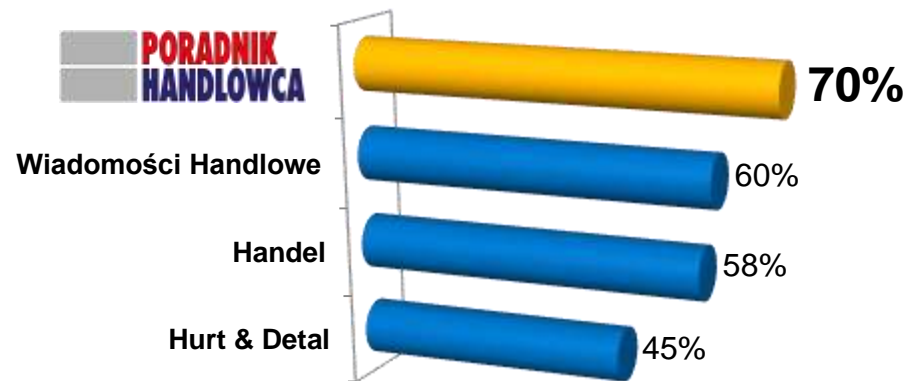
PROMPTED MAGAZINE AWARENESS

What trade magazines from this list have you ever heard of?
(aided with vignette and face of magazines)

Total stores in Poland N=1006



Total stores in Poland – persons receiving trade press N=784



*Data presents results above 3%.
Only high-volume magazines with monthly circulations of minimum 60 000 copies.
Standard error does not exceed 2 pp.*

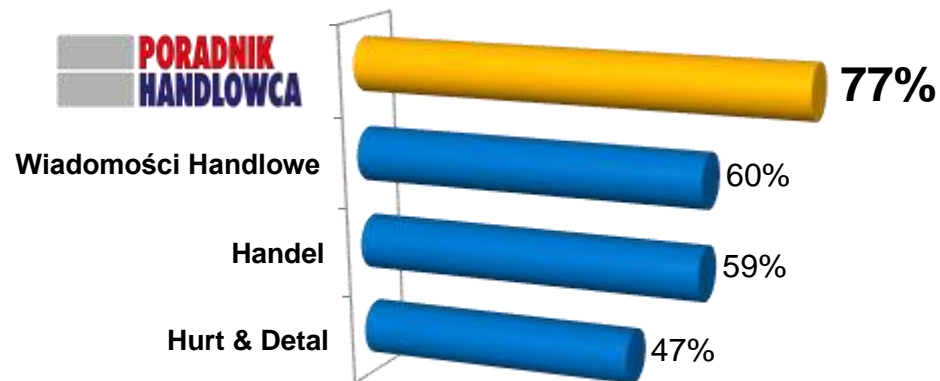
PROMPTED MAGAZINE AWARENESS

What trade magazines from this list have you ever heard of?
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Stores in cities below 10 000 inhabitants persons
receiving trade press, N=294



Stores in cities over 10 000 inhabitants
persons receiving trade press, N=490



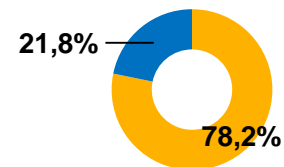
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REACH OF MAGAZINES IN RETAIL STORES

REACH OF MAGAZINES

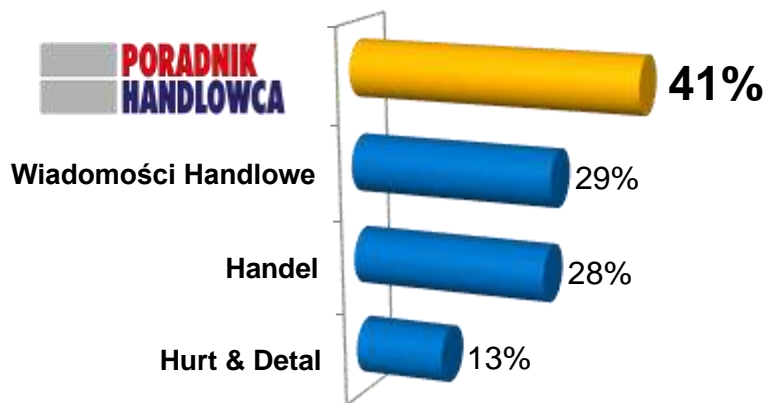
Which of the magazines from this card reach your shop?
(aided with vignette and face of magazines)

Total stores in Poland N=1006

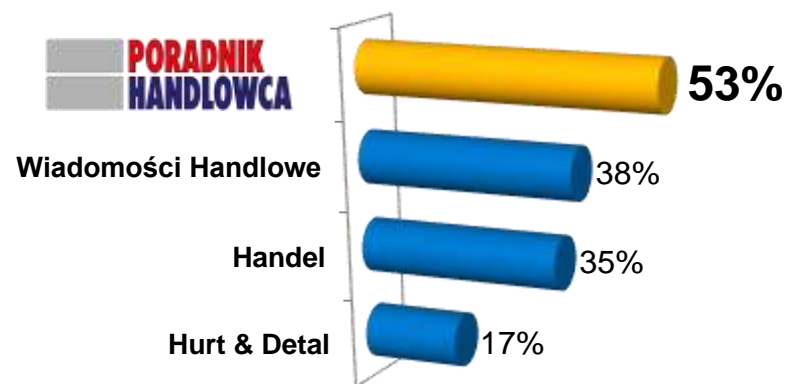


- Receives trade press
- Doesn't receive trade press

Total stores in Poland N=1006



Total stores in Poland – persons receiving trade press N=784

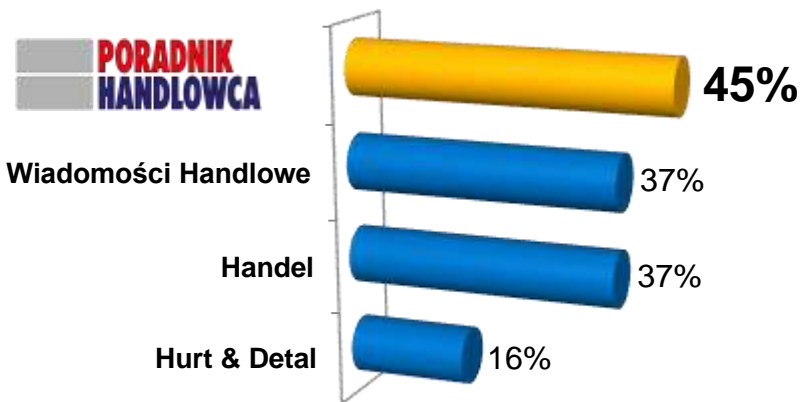


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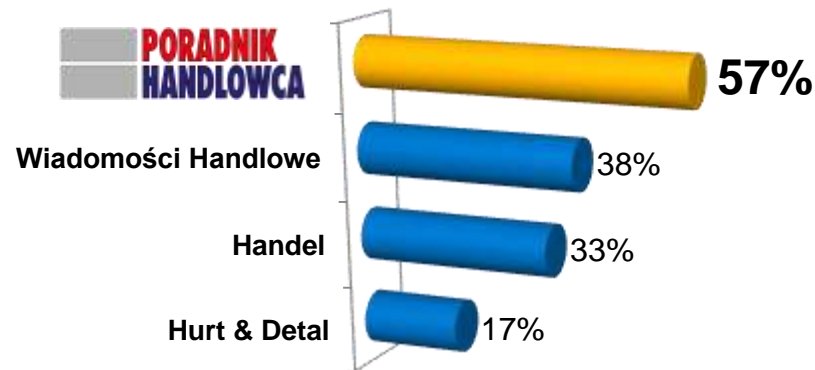
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persons receiving trade press, N=490



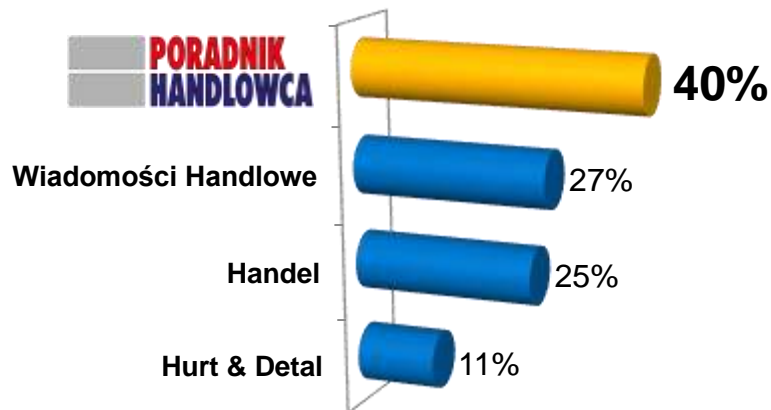
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READERSHIP OF TRADE PRESS

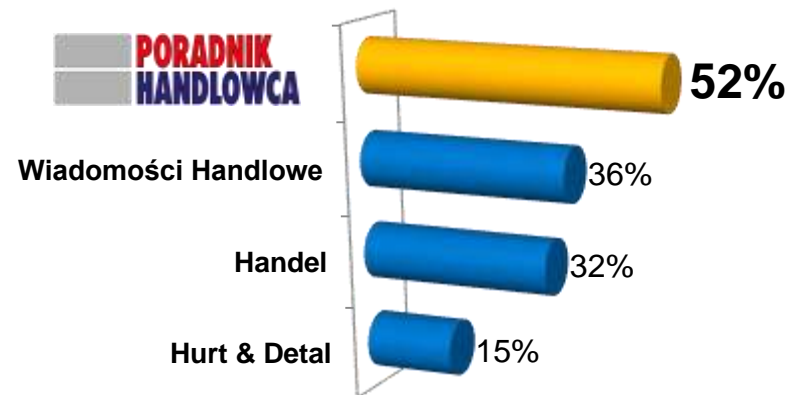
READERSHIP OF SEASONAL CYCLE

Have you read... in the past 6 months?
(aided with vignette and face of magazines)

Total stores in Poland N=1006



Total stores in Poland – persons receiving trade press N=784

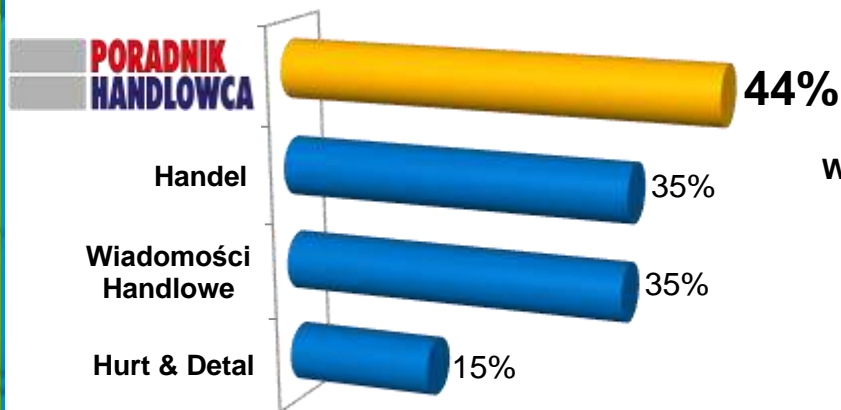


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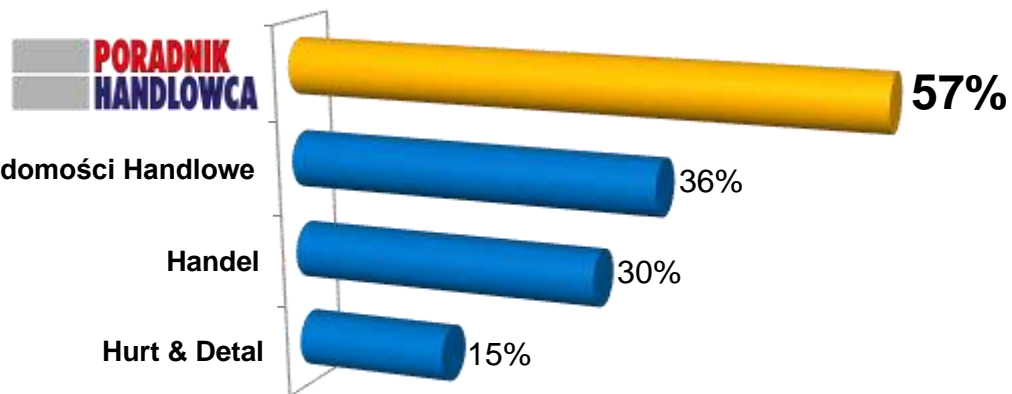
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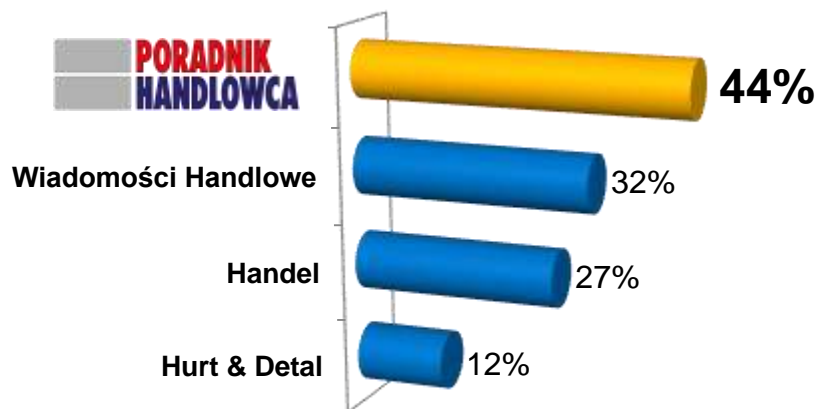


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READERSHIP OF THE LAST EDITION

Have you read the last edition of ... magazine?
(aided with vignette and face of magazines)

Total stores in Poland – persons receiving trade press N=784



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TRADITIONAL STORES (SMALL-FORMAT)

PROMPTED MAGAZINE AWARENESS

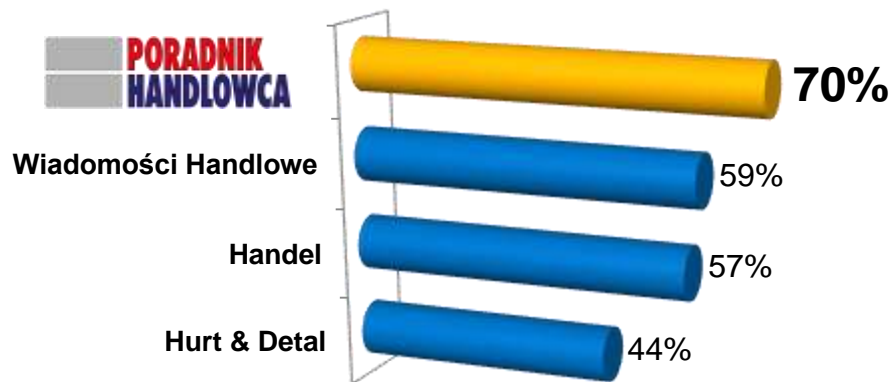
TRADITIONAL STORES (SMALL-FORMAT)

What trade magazines from this list have you ever heard of?
(aided with vignette and face of magazines)

Traditional stores (small-format) N=849



Traditional stores (small-format)
persons receiving trade press, N=665



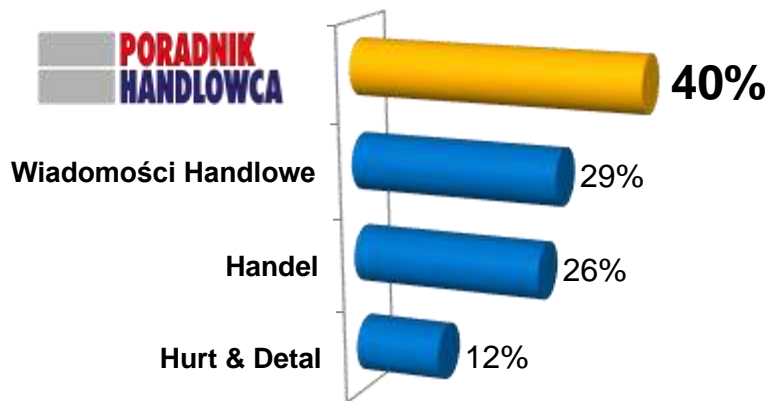
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REACH OF MAGAZINES

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Traditional stores (small-format)
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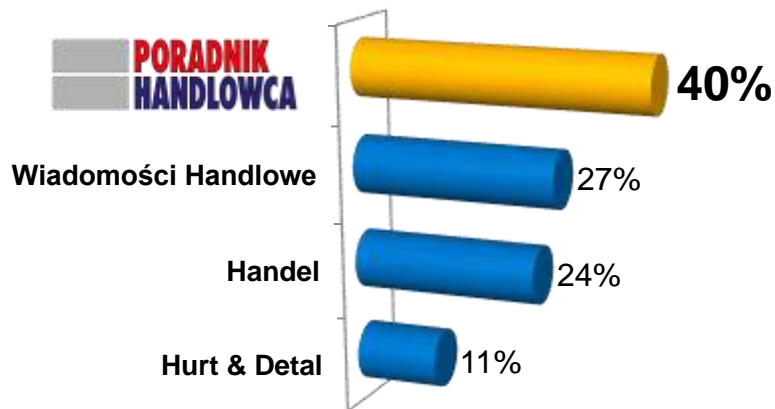


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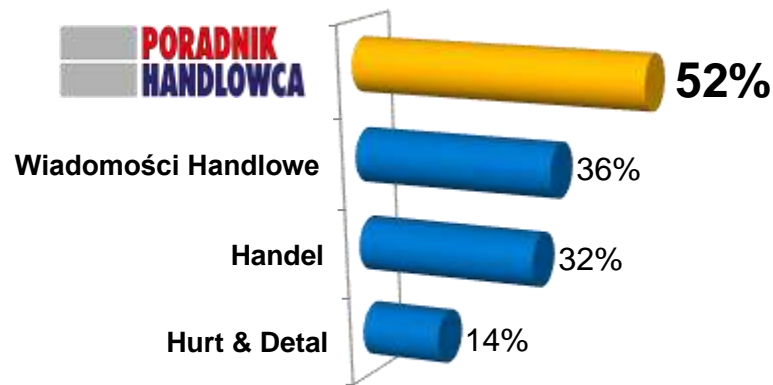
READERSHIP OF SEASONAL CYCLE TRADITIONAL STORES (SMALL-FORMAT)

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Traditional stores (small-format) N=849



Traditional stores (small-format)
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MODERN TRADE (HYPERMARKETS & SUPERMARKETS)

PROMPTED MAGAZINE AWARENESS

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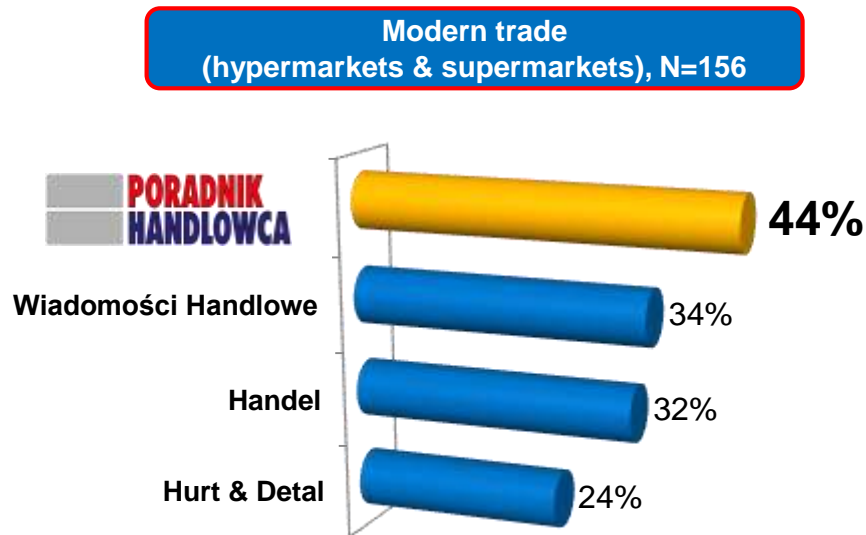


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REACH OF MAGAZINES

MODERN TRADE (HYPERMARKETS & SUPERMARKETS)

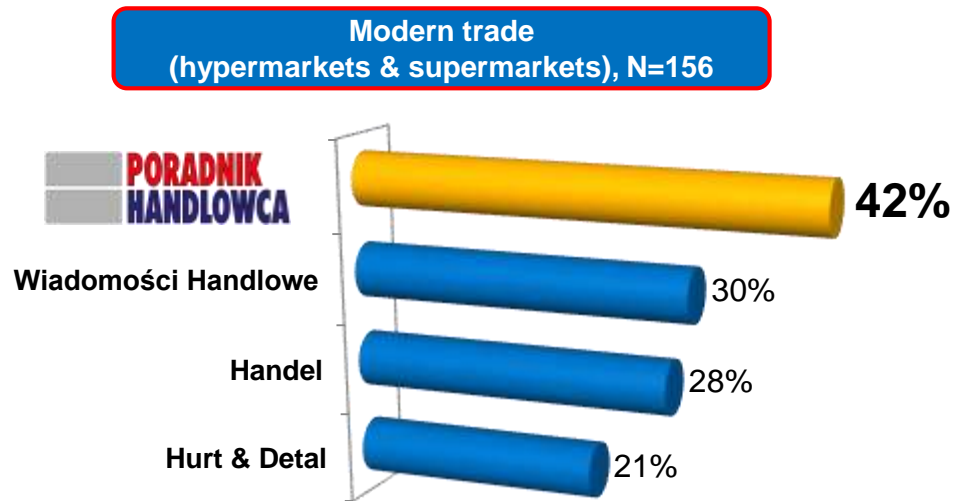
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READERSHIP OF SEASONAL CYCLE MODERN TRADE (HYPERMARKETS & SUPERMARKETS)

Have you read... in the past 6 months?
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COMMENTARY OF THE TRM 2020 RESULTS

TRADE READERSHIP MONITOR (TRM) 2020

„Poradnik Handlowca” holds major advantage over competing trade press magazines and keeps strong position of leading FMCG title in Poland!

Bartłomiej Strączak
Client Business Partner
Customized Intelligence
Nielsen Polska

In September and October of 2020, Nielsen Poland conducted a trade press readership study (TRM) among retailers in stores in Poland. The TRM project has been monitoring the distribution and readership of leading trade press magazines in retail stores for many years. **This year, the TRM study had a syndicated nature, and for the ninth time in history, international FMCG producers who commission advertisements in the press took part in it. Among the publishers of trade press magazines the publisher of Poradnik Handlowca took part in the project.**

The TRM trade press readership report describes a number of parameters that allow the comparison of individual magazines dedicated to the retail industry. The most important factor, monitored by both publishers of trade press and advertisers of these magazines, is the level of reach of the individual magazines to retail outlets in the country, which is the percentage of stores that confirm receiving of the trade press on a regular basis and in the current period during the study. This year's TRM results confirm again that "Poradnik Handlowca" is a clear leader in this aspect. It has consistently maintained a significant, large competitive advantage for the last few years of research. The result of "Poradnik Handlowca" shows that this magazine has a well-developed distribution system that matches the structure of retail trade in Poland. The result also proves a high loyalty of readers to this magazine.

TRADE READERSHIP MONITOR (TRM) 2020

Methodology of the research:

The research just like in all previous years has been conducted as a face-to-face direct interviews in stores, on a sample of over thousand retail shops in whole Poland. Persons in charge of stores' supplies and those who read trade press were interviewed. In order to boost accuracy and precision of the recognition of magazines available on the market, every participants interview has been aided with vignette and cover of last three editions of magazines. This is very important step of the methodology, one that prevents confusion of the similar sounding trade press titles among the participants. In addition, the accuracy of the research has been also verified with inspection of magazines that were in store of the participant during the interview.

The research is representative for FMCG retail trade in Poland and has been conducted on a 1006 stores sample, randomly chosen from copyrighted data base of all stores in Poland (register of Nielsen Poland) updated annually. This data base is also used for many market researches for retail chains and FMCG producers. Interviews have been conducted in all major types of stores responsible for FMCG goods turnover in Poland e.g.: food stores, sweet-alcohol stores, multipurpose stores, drugstores and „food and mixed stores”. For most accurate data of trade press readership the results were weighted according to the proportions of each type of stores in region and population

Research covered the following magazines:

- High-volume monthly magazines – Handel, Hurt&Detal, Poradnik Handlowca and Wiadomości Handlowe

Covered magazines had to meet two basic criteria:

- title is currently registered in Association of Press Distribution Control (Związek Kontroli Dystrybucji Prasy)
- their circulation is at least 60 thousand copies.

TRADE READERSHIP MONITOR (TRM) 2020

Main results:

On all major indicators of reach and readership of magazines, “Poradnik Handlowca” took the leading position in 2020, definitely strengthening its clear advantage over the competition and maintaining its leading position this year. After a significant increase in recent years in the reach of magazines indicator, “Poradnik Handlowca” has a high rate of reach 41% and 53% in stores which confirm receiving of trade magazines. It is worth emphasizing that Poradnik Handlowca maintains high advantage over the second and third title among the top three magazines. The next titles on the podium - "Wiadomości Handlowe" and "Handel" – have respectively 29% and 28% of reach, which is basically interpreted as the same result. When we look at the readership factor of trade press magazines, “Poradnik Handlowca” is read periodically in 40% of stores in Poland, and two other competitors in about one-fourth of the stores.

Overall, the trade press magazines have high reach level to retail shops in the last few years. Trade press is a very useful source of information about products, market news, as well as valuable provider of know-how for store owners and managers. The importance of trade press is highlighted with the fact that among its readers more than one third replied that they reached to it for a source of information and know-how to support the store supplies.

We would like to thank all the readers of the trade magazines who participated in the study. Your opinions are very important for rising standards of trade press and the accuracy of readership researches in Poland.

METHODOLOGY

REPRESENTATIVE REPORT OF LARGE AND SMALL FORMAT TRADE IN POLAND

The sample of stores for the report is based on copyrighted data base of all stores in Poland (register of Nielsen Poland)

Randomly we chose representative sample for all types of large and small format retail trade in Poland

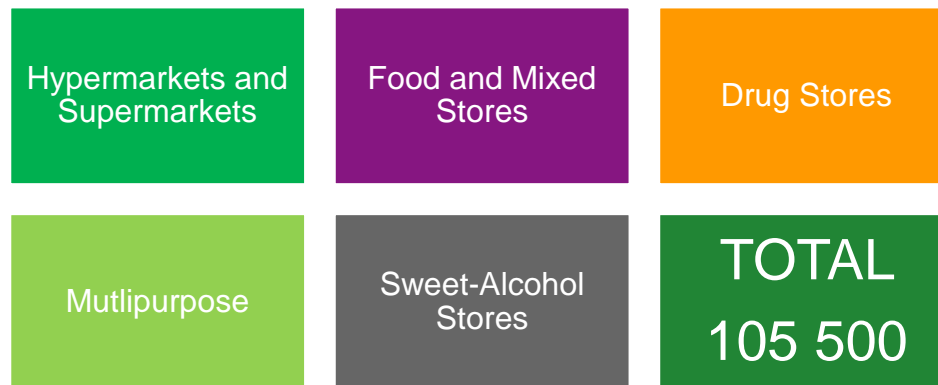
During the selection of the sample the characteristic of each store is considered (the same features as in Panel Handlu Detalicznego™)

The results are weighted according to the proportions of each type of stores in region and population



As a result of weight, the data of this report is representative for total stores and in each format of stores in Poland

STORES' POPULATION REPRESENTED IN TRADE READERSHIP MONITOR RESEARCH 2020



- As a result of data weight – results are representative for retail trade of FMCG in Poland Sales
- channels with significantly different assortment (gas stations, pharmacies) and those which have marginal impact on FMCG trade (food and multipurpose kiosks) have been excluded
- Types of stores not considered in the research account for no more than 6% of turnover in trade of FMCG articles

NIELSEN'S STANDARDS

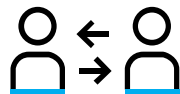
- ▶ Applied statistical methods guarantee fulfillment of global quality standards concerning reported results:



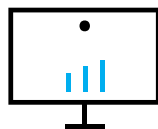
Standard error for proportions at the level of a whole sample does not exceed 2 pp (percentage points) for the sample of 1006 stores

- ▶ Given maximum value of standard error concerns values reported for the whole country
- ▶ The fulfillment of Nielsen global quality standards concerning the quality of reported data is provided

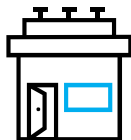
METHODOLOGY



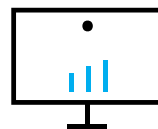
face-to-face interviews, with persons responsible for purchasing decisions in stores



Conducted with **CAPI method** (*CAPI - computer assisted personal interviewing*) – with the aid of computer app for data input



Representative sample N=1006 stores of large and small format in Poland (including hipermarkets, supermarkets, food-stores, mixed stores)



Participants of the syndicated study: Publisher of „**Poradnik Handlowca**” and **two major FMCG manufacturers**



The results of the **TRM 2020** study have been delivered in November 2020

TRADE PRESS READERSHIP DEFINITION

Definition 1 Shop research



- Does any trade press reach shop?
- Which titles?
- Who reads trade press in a shop?
- What is the position and competences of such person?

Definition 2 Decision makers research



- Who decides about shopping in shop, in case of which product categories?
- Does he/she receive trade press?
- Which titles?
- Which of these titles is he/she reading?

In the Nielsen research definition 1 was accepted.

Respondents were people who read trade press in shops where trade press reaches and who are responsible for the supply. If there's no one in the shop responsible for the supply, the interview was conducted with a person who reads trade press. Such situation could take place only in the shops which are part of chains, where decisions about supply are made in the main office.

TRADITIONAL STORES DEFINITION

for clarity of reporting

SMALL-FORMAT GROCERY STORES:

Shops with sales area field to 300 m², regardless of the type of service, ones that sell groceries and drugstore and cosmetic products. Alternatively, ones where you can buy cigarettes and newspapers. Due to the size of the sales area, grocery stores are divided into groups:

- **Large food stores** – minimum 101 m²
- **Middle food stores** – between 41 m² and 100 m²
- **Small food stores** – up to 40 m²

DISCLAIMER *(SHOULD STAY IN POLISH LANGUAGE)*

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