

According to the Polish Agency for Foreign Investment (PAIIZ), there are around 6000 companies with German capital operating in Poland, and the worth of their direct investment has exceeded 21 billion Euro in 2010. This group includes retailers (such as METRO Group or Rossmann), many banks (HypoVereinsbank, Commerzbank, Deutsche Bank etc.), car manufacturers (Volkswagen, Opel), energy sector (RWE), industrial conglomerates (Siemens, BSH), and a large number of food and cosmetics manufacturers (Nivea, Tchibo, Dr. Oetker, Zott – to name a few), a mobile operator (T-Mobile) and publishers (Gruner+Jahr, Ringier Axel Springer). According to an AHK study, German businesses perceive Poland as the most attractive place for investment in Europe (source: AHK, 2011). Indeed, some companies mentioned here were wildly successful.

German companies are also among the major advertisers. It has certainly helped that Poland was the only EU country with positive GDP growth in the recent crisis, and the average annual GDP growth rate during the last decade reached four percent (source: Central Statistical Office).

It is not surprising that such level of involvement requires significant volume of market research, from large market entry studies to small ad tests. These research projects are frequently carried out by German agencies, either as stand-alone jobs or large multi-country studies. However, local conditions are much different from what many clients assume (to put it mildly). In our opinion, it is the role of market researchers to identify and validate false assumptions, as they often distort the true picture of the marketplace – without even being considered.

One of most important factors is that Poland and other Eastern European countries have all undergone a deep economic and social change. Whatever was true 20 or even 10 years ago, today it is irrelevant. Many people travelling from Western Europe to the East are really surprised to see that Eastern Europe is in many aspects as modern as any other developed country, or even more advanced (especially those who still believe that Eastern Europe is all as drab and grey as in communist times). Even Poland is catching up with highways.

For research purposes, that makes any socioeconomic classification a daunting task – in particular, the commonly used SEC system is very hard to translate and it should be used sparingly, especially as recruitment criteria. On top of that, as many as 30-40



So Close, So Different

Market research in Eastern Europe – Part 1

As a large European country next door, Poland is an important market for German companies. Quite naturally, German research agencies are carrying out more and more research projects that include Poland and other Eastern European countries – many perceive this a challenge. In this series **Agnieszka Górnicka** highlights important factors that have to be considered in research design and analysis.

percent of the population refuse to provide their income level (depending on study). To overcome that, we recommend to use a qualitative scale describing the perceived financial status of the respondent. Although this means an apparent loss of “hard” data, this provides a much better insight about different social groups.

Also, despite being so close to each other, Poland and Germany have very different cultures and traditions which are deeply rooted in history. As a result, we have different communication styles and that is evident everywhere – in personal contacts, media content and business relationships. Moreover, our mutual perceptions are marked with stereotypes, and that is never a good basis for real understanding. Even “Polen für Anfänger”, the ZDF/3sat movie by Kurt Krömer and Steffen Möller, touches this topic in a superficial way.

From the marketing perspective, the different communication styles translate into different perception of advertising and all marketing communication. Polish people are more relaxed and less serious about themselves, willing to laugh at their own weaknesses (to a certain limit, of course). Another difference is that Poles mistrust almost any authority (with the notable exception of the Pope), so if you use endorsement in your communication, it has to be done with cau-

tion. In many situations, Poles prefer an indirect, allusive style, where the message has to be derived by the viewer.

Having experienced constant change, the Polish society is more open to new things and experiences compared to the Germans but that does not make it easier for marketers to launch new products. That’s because Poles are much less brand loyal and more eager to switch between brands and shopping places at a whim, which may be bewildering for German researchers. Due to a unique retail structure, the choice is also much wider than in Germany or any other Western country. For more details, see the next Research & Results issue (7/2011). ■

 Mehr Fachartikel zum Thema „Internationale Forschung“ unter: www.research-results.de/fachartikel

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