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Consumer Behaviour as a Criterion for Segmentation of the Coffee Market in Poland

ABSTRACT
Based on the results of quantitative and qualitative studies, this article presents consumer behaviour on the coffee market in Poland in relation to the selected coffee categories (whole bean coffee, 3-in-1 instant coffee and instant cappuccino). For the purpose of this article, an interview study using the CAPI *(Computer Assisted Personal Interview)* technique was conducted on a nationwide sample of 951 coffee consumers. In parallel, a group interview study using the BBD (*Bulletin Board Discussion*) technique was conducted with a sample of 12 people. The results presented in this article indicate changes in the behaviour of coffee consumers on the Polish market. The results also made it possible to identify and characterise five segments of the coffee market in Poland, such as: "Social Gourmets", "Practicals", "Ordinaries", "Pleasure Hunters" and "Energy Accumulators". The results of the research can provide valuable guidance for coffee producers in the process of developing effective marketing strategies, particularly on the Polish coffee market.

Keywords: coffee, coffee market, consumer behaviour, market segmentation, Poland.

JEL ClassIfication: D49, L11, L15, M31, M37.

Paper received: 24 March 2024 • Paper revised: 10 June 2024 • Paper accepted: 17 June 2024

Introduction

Next to tea, coffee is one of the most popular beverages in Poland. Numerous studies carried out by, among others, the authors of this article on the coffee market in Poland show that Poles drink coffee every day and that its consumption is an integral part of everyday life, whether at home, at work or in cafés. The popularity of this beverage is reflected both in statistics (according to various studies, an adult Pole consumes an average of just over 2 kg of coffee per year, which places Poland in the European average for coffee consumption per capita) and in daily habits (many Poles start their day with a cup of coffee and coffee breaks at work are common) (Zakrzewska, 2022). Coffee is therefore not only a popular beverage, but also an important part of culture and everyday life in Poland. This is why it is so important to conduct regular research into consumer behaviour on this market. Understanding this behaviour and monitoring changes is particularly significant in the process of developing a marketing strategy, especially at the stage of segmenting the coffee market. Properly conducted segmentation, followed by characterisation of the target customer profile, can provide valuable information for both management practitioners and researchers dealing with broader market and consumption issues.

In undertaking an analysis of consumer behaviour on the coffee market in Poland, it is important to define what we mean by the terms 'consumer' and 'consumer behaviour', which will be used throughout this paper. According to the American Marketing Association's dictionary in traditional terms "a consumer is the ultimate user or consumer of goods, ideas, and services. However, the term also is used to imply the buyer or decision maker as well as the ultimate consumer" (AMA definition). For instance, a parent buying chicory coffee for their child is typically referred to as a consumer, despite not being the final user of it. In the academic literature, the term 'consumer' frequently refers to a buyer of goods for personal use (Sobol, 1995, p. 589). Kopaliński (2003, p. 228) further extended this definition by adding the word 'spożywca' (which can be translated as a buyer of goods or services), while Adam (1989, p. 136) additionally emphasised that a consumer is a person who does not resell bought goods and services to anyone. In accordance with Kieżel (2004, p. 17), a consumer is defined as an individual who feels and satisfies their consumption needs, either through the goods and services purchased on the market, produced in their own household or received through social benefits. On the other hand, Janoś-Kresło and Mróz (2006, pp. 14-15), made it more specific by adding that a person satisfies the needs which they experience through the use of goods and services, while Smyczek and Sowa (2005, p. 28) stated that: "a consumer satisfies their consumption needs according to their own preferences, tastes and traditions".

In academic literature on marketing, the term 'consumer' is therefore often replaced by the terms 'customer' or 'buyer'. It is also important to note that the term 'customer' is a broader concept. This is because it also includes individuals who buy industrial goods and services to satisfy their production needs. In contrast, the term 'buyer' refers to a person who performs the act of buying a good, without necessarily satisfying their own needs (Smyczek, Sowa, 2005, pp. 23-29). This article adopts J.

Kramer's definition that a consumer is not merely a purchaser, but rather an individual who buys and consumes goods and services and makes the choice of goods and services guided by their preferences, income, as well as tastes, habits and traditions. Furthermore, the entire set of market conditions, including price and other sales conditions, affects the consumer's final purchase of goods and services (Altkor, Kramer, 1998, p. 120).

The concept of 'consumer behaviour' began to appear widely in the literature in the mid-1960s, and in Poland in the late 1980s. C.F. Kaufman (1995, pp. 39-55) defines consumer behaviour as any behaviour of people, whether at home, at work, in a shop or even on the street, i.e. wherever they think about shopping, buy or use the products they have bought. For the purposes of this article, consumer behaviour is assumed to be, according to the American Marketing Association's definition, "the dynamic interaction of affect and cognition, behaviour, and environmental events by which human beings conduct the exchange aspects of their lives" (AMA definition).

In the 21st century, consumer behaviour (including on the coffee market) is the subject of marketing research, which provides information about the consumer's needs, preferences, behavioural determinants and attitudes towards the brand, the offer and the organisation. The results of the research provide valuable insights into buying patterns, motives for market choices, loyalty, price sensitivity, sensitivity to marketing activities or perception of consumer decisions and, ultimately, acceptance of the company's offer. The central consumer position in the activities of a modern organisation, an insightful and dynamic view of their behaviour, research, the anticipation of demand, the creation of consumer needs and preferences, the subordination of corporate objectives and the strategies to the demand of a specific consumer segment, the application of full-quality marketing are the conditions for providing consumer satisfaction. Consumer behaviour researchers, who represent a range of scientific disciplines, investigate various elements of consumer behaviour, including the decision-making process, consumer emotions, the influence of various factors on purchasing decisions and, finally, the consumer's reactions to a given product, both individually and as a member of a family or other social group. Therefore, consumer behaviour is not only a category, but also a significant piece of knowledge in an organisation's decisions.

When writing about consumer behaviour on the coffee market in Poland (or, more precisely, the market for coffee products), it is important to note that coffee is a highly significant product in the shopping basket of Poles (Maciejewski, Mokrysz, Wróblewski, 2020). It ranks fourth in the food category in terms of annual turnover. According to T. Zalega (2011, pp. 119-136), coffee in Poland can be classified as a normal good for which the coefficients of income elasticity of demand are inelastic. This means that changes in demand occur more slowly than changes in income. Therefore, despite rapidly rising prices, coffee is still one of the most consumed beverages in Poland, and what is more, its consumption continues to grow. Over 80% of adult Poles report consuming coffee on a regular basis, with a significant proportion reaching for it at least once a day (according to data from the Public Opinion Research centre (CBOS), even 60%), and as many as 16% drink several cups of coffee every day (Zakrzewska, 2022). According to data from the Central Statistical Office (CSO) for 2023, the average monthly coffee consumption per person in Polish households in 2022 was 0.19 kg, which yields an annual consumption of 2.28 kg in 2022, compared to 2.16 kg in 2012 - Table 1.

Table 1. Average monthly coffee consumption per person in households by socio-economic group (in kg)

Specification	Years										
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Employed households	0.16	0.16	0.16	0.16	0.16	0.16	0.16	0.18	0.17	0.17	0.17
Farming households	0.17	0.17	0.16	0.16	0.18	0.17	0.16	0.17	0.18	0.17	0.18
Self-employed households	0.16	0.16	0.14	0.14	0.15	0.15	0.15	0.15	0.16	0.17	0.16
Retired households	0.23	0.23	0.23	0.23	0.24	0.23	0.24	0.25	0.26	0.26	0.25
Disability benefit households	0.23	0.23	0.23	0.24	0.25	0.24	0.25	0.27	0.25	0.28	0.27
Total	0.18	0.18	0.17	0.18	0.18	0.18	0.18	0.18	0.19	0.19	0.19

Source: compiled based on CSO statistical data: Household budgets (2012 - 2022), Warsaw 2013-2023.

The data presented in Table 1 indicates that the monthly consumption of coffee in Poland has remained at a very similar level over the last 10 years (0.18-0.19 kg), however an upward trend can be observed. The socio-economic group that has consistently consumed the most coffee since 2012 is the retired and disability benefit households. However, it is important to remember that in Poland coffee is available and consumed in different forms. The most common division is between natural coffee and instant (highly processed) coffee. The first group includes the following coffee categories:

- Whole bean coffee – these are roasted coffee beans that, when ground, release intense taste and aroma. The main coffee varieties that are grown worldwide, and at the same time are distinct subcategories within the whole bean coffee category, are:
  - Arabica - considered the noblest coffees, it requires better soil and sunlight than Robusta. These coffee beans produce a mild and slightly acidic brew. They account for almost 70% of the world's coffee crop.
  - Robusta - a species with an intense, strongly perceptible taste. Some varieties can even taste spicy. Robusta has a higher caffeine content than Arabica and is considered by a large proportion of consumers to have a more distinctive taste.
  - Liberica - the least aromatic coffee of all, yet it has a higher yield and is more resistant to pests.
- Ground coffee - means coffee beans roasted and ground by the producer. Such coffee is quicker to prepare, but is almost always of inferior quality to whole bean coffee.

On the other hand, the group of instant (highly processed) coffees includes:

- Instant coffee – actually, it is a coffee drink prepared from coffee extract. The instant version contains twice the amount of caffeine as ground coffee. In the 21st century, Poland is the second-largest consumer of instant coffee in Europe, with only the British reaching for it more readily than Poles (Maciejewski, Mokrysz, Wróblewski 2020).
- Instant cappuccino - a type of coffee drink for self-preparation at home. It is definitely the most processed coffee drink compared to whole bean, ground or even instant coffee.
- 3-in-1 (or possibly 2-in-1) instant coffee - a coffee drink that consists of a mixture of the following ingredients: sugar, glucose syrup, hardened vegetable fat, instant coffee powder (approx. 10-20%), chicory coffee extract, stabilisers, milk protein, powdered milk, emulsifiers, anti-caking agent, salt and colouring. This coffee category is relatively young, having been known in Poland since around 2002. Since then, however, it has been growing steadily and has taken a significant share of the cappuccino powder market (Chudy, 2014). Hot water is simply poured over the contents of the pack to produce a ready-to-drink beverage.
- Capsule coffee - is designed for special espresso machines. The secret of this coffee category lies in the variety and composition of the aluminium capsules, which protect the aroma of the freshly ground coffee. A capsule usually contains 5-7 grams of ground coffee. The aluminium capsule is only opened at the moment of extraction, i.e. when the pressurised water flows through it to produce a flavoured drink.
- Coffee pods - designed for coffee machines that use the coffee pod system. This coffee category can be prepared instantly in a dozen or so seconds. The uniqueness of this drink lies in the perfectly selected quantity of coffee beans.

In this article, the research focused specifically on the behaviour of whole bean coffee, 3-in-1 instant coffee and instant cappuccino consumers.

Methods

The methodology of research on consumer market behaviour is focused on the collection of the primary and secondary information necessary to identify the complex of phenomena and processes related to market choices, purchase decisions, including the proceedings preparatory to these decisions and their consequences (Smyczek, Sowa, 2005, p. 16). This also applies to the coffee market in Poland. The types of consumer behaviour research which are most frequently carried out include (Solomon, 2006, pp. 263-265):

- study of consumer needs and preferences,
- study of consumer perception,
- study of consumer behaviour (at individual stages) and its determinants,
- study of opinions and attitudes,
- study of behavioural motives,
- study of lifestyles and psychographics,
- study of purchase intentions.

This article focuses primarily on the identification of consumer behaviour on the coffee market in Poland. To this end, the authors' own research was conducted in accordance with the interpretative methodological approach. The research was carried out using both the general method, which is incomplete numerical induction, and the specific method – the interview method. This is an inductive reasoning, the premises of which do not exhaust all of the subjects to which the general law expressed in the reasoning conclusion refers. The premises are specific sentences, while the conclusion is a general sentence, and each of the premises follows logically from the conclusion. This method involves deriving a general rule from a limited number of details.

In an effort to obtain in-depth and comprehensive results, a mixed research approach combining both quantitative and qualitative studies was adopted. The choice of the two research approaches was primarily guided by the fact that the knowledge gained through the triangulation effect is more complete than if only one of the procedures is used. This approach allows for a holistic view of the research subject and thus provides a consistent empirical basis for reasoning (Teddlie, Tashakkori, 2010, pp. 95-118).

The qualitative study for the needs of this article was conducted using the BBD (*Bulletin Board Discussion*) technique with a sample of 12 coffee consumers. The BBD survey was conducted in a manner similar to a discussion forum, but with the involvement of a moderator, according to a detailed interview script divided into days and themes. Participants in the survey were able to read posts, answer questions, share comments, post their own content, multimedia, and upload and download a variety of files. The qualitative study using the BBD interview method was conducted over five consecutive days in November 2022 using a specially designed electronic platform for remote communication. On each day, respondents were asked to complete a task, expressing their opinions in pre-defined areas. Each of the tasks, i.e. themes for the day, covered pre-defined exploratory research areas: consumer habits in planning, buying and preparing coffees, and perceptions of coffee categories. The main objective of this study was to find out how consumers behave on the market. In the study particular attention was paid to the consumers' habits and attitudes towards the different types of coffee (whole bean, instant cappuccino and 3-in-1 instant coffee). A further objective of the research was to complement the quantitative study carried out in parallel by describing the market segments identified on the basis of the information on coffee consumption methods (whole bean, instant cappuccino and 3-in-1 instant) and on attitudes to consumption itself. The following issues were examined in detail:

- the main product-related factors influencing the consumption of whole bean coffee, 3-in-1 instant coffee and instant cappuccino in Poland;
- occasions for coffee consumption by type;
- reasons for drinking coffee by type.

The subjects were divided into two groups of six individuals each. Each group included both men and women - those responsible in the household for shopping, choosing the type of coffee, consuming coffee, in the proportion of four women and two men, aged 25-45 (evenly distributed by age: 50% - aged 25-35 and 50% - aged 36-45). The sample included singles (one person per group), couples/married couples without children (one person per group), families with children up to the fourth grade of primary school (two people per group), families with older children (two people per group). These were people from three locations: Warsaw (two people per group), another large city in the Upper Silesia conurbation (two people per group) and a small town: Kielce (two people per group). Basic information on the BBD-type study conducted is included in Table 2.

Table 2. Basic information on the qualitative study conducted

Specification	Study
Research method	Group interview
Technique	BBD *(Bulletin Board Discussion)*
Duration of the study	Five consecutive days
Research tool	Electronic platform for remote communication, detailed interview scenario
Sample definition	Coffee consumers - men and women of different ages and at different stages of the family life cycle
Sample size	N=12 (two groups of six people each)
Geographical scope of the study	Territory of Poland
Time frame of the study	November 2022

Source: own research.

In parallel with the qualitative BBD study, a quantitative study was carried out using a standardised questionnaire interview with CAPI *(Computer Assisted Personal Interview)* technique. This was a U&A *(Usage and Attitude)* survey. Its main objective was to identify and characterise the coffee market segments in Poland. Due to the very large amount of data collected in the course of the conducted studies (quantitative and qualitative), this paper is limited to presenting only selected results that directly relate to consumer behaviour on the coffee market and the subsequently identified coffee market segments in Poland.

The U&A survey was conducted in November 2022 with a sample of 951 coffee consumers aged 18-65. According to data from the Central Statistical Office in Warsaw, as of 31 December 2022 there were almost 24 million people aged 18-65 in Poland (23,989,507 people). This was used as the basis for determining the size of the research sample (N=951), assuming an error rate of 3%, a fraction size of 0.5 and a confidence level of 96%. Calculations were made using a sampling calculator according to the formula for minimum sample size *(Nmin)*.

$$N_{min} = \frac{N_P(\alpha^2 \cdot f(1-f))}{N_P \cdot e^2 + \alpha^2 \cdot f(1-f)}$$

Where:

- *Nmin* - minimum sample size;
- *Np* - size of the population from which the sample is taken;
- α - confidence level for the results, the value of the Z-score in a normal distribution for the assumed significance level;
- ƒ - size of the fraction;
- *e* - assumed maximum error, expressed as a fractional number.

This was a nationwide sample, representative of the Polish population aged 18-65 in terms of age, gender, education, class, town size and region. The sample was selected from those who reported at least occasional consumption of coffee or coffee drinks. Basic information on the U&A-type study conducted is shown in Table 3.

Table 3. Basic information on the quantitative study conducted

Specification	Study
Research method	Standardised individual interview
Technique	Face-to-face, CAPI *(Computer Assisted Personal Interview)* U&A *(Usage and Attitude)* survey
Average interview length	60 minutes
Research tool	Standardised questionnaire
Sample definition	Nationwide sample of coffee and coffee drink consumers aged 18-65
Sample size	N=951
Geographical scope of the study	Territory of Poland
Time frame of the study	November 2022

Source: own research.

Turning to the main part of the analysis, after having characterised the populations studied, it should be noted that the data obtained from both quantitative and qualitative studies provide us with knowledge of the respondents' opinions on consumer preferences and behaviour on the coffee market, rather than the actual state of affairs in this regard. However, the large size of the sample and the reliability and goodwill of the research group must be taken into account.

Results

Results of the qualitative studies

In Poland, coffee is very often available commercially in the form of whole bean coffee (for self-grinding and brewing), instant cappuccino and 3-in-1 instant coffee. Therefore, the main focus of the qualitative study was on consumer behaviour in relation to the consumption of these three coffee categories. The BBD survey participants were first asked to identify the main factors associated with a particular coffee category influencing their choice and consumption of whole bean coffee, instant cappuccino and 3-in-1 instant coffee. Their responses were then aggregated and the resulting findings are presented in Tables 4, 5 and 6. Table 4 presents the characteristics of the four most important factors (according to the respondents) influencing the choice and consumption of whole bean coffee by Polish coffee consumers.

Table 4. Main product-related factors influencing the choice and consumption of whole bean coffee in Poland

No.	Factor	Description
1	Intense aroma and distinctive taste	Whole bean coffee consumers talk a lot about its taste and aroma – drinking coffee gives them great pleasure. They describe the aroma of whole bean coffee as rich, intense, unique, even heavenly or divine. It can be smelt throughout the room when preparing and drinking coffee (especially coffee prepared from freshly ground beans). The taste is described as deep, strong, distinctive and with a slight bitterness. Whole bean coffee consumers perceive different flavours and aromas in coffee: for example, those of chocolate and almonds.
2	The ritual of making and drinking coffee	Preparing and brewing coffee is a ritual and a pleasure in itself. Advocates of whole bean coffee often grind it fresh in a special grinder (e.g. a burr grinder) just before brewing. They have coffee-making equipment (coffee machines, espresso machines, aeropresses). They "personalise" their coffee in different ways depending on their taste and mood: a favourite cup or special glass, different strengths, addition of steamed milk, spices (cinnamon, cocoa), syrup. Whole bean coffee consumers are interested in coffee and how to prepare it. The coffee ritual is also about its role in life - coffee is central to the ritual of starting the day or having a moment to yourself.
3	Sophistication and elegance	Whole bean coffee is associated with a certain sophistication: it takes time and expertise to brew. Coffee is associated with elegance, prestige and uniqueness: with a café atmosphere, a gift, a business meeting and a social gathering where you need to show your best side to your guests. Whole bean coffee is associated with the rite of passage into adulthood. Coffee is for adults, not children (strong, stimulating, dark, with bitterness). For whole bean coffee consumers, the elegance of the packaging is important, conveyed, for example, by gold elements, subdued 'grown-up' colours (black, dark green, navy blue, etc.) and simplicity.
4	Stimulating effect	Although stimulation is not the only benefit expected by whole bean coffee consumers, the archetypal coffee is stimulating. It stimulates its consumers with caffeine and a sensory-stimulating aroma and taste. Such coffee is associated with traditional masculinity (strong, powerful, energetic, expressive). Importantly, even some cappuccino and 3-in-1 coffee consumers drink whole bean coffee in the morning to wake up.

Source: own (qualitative) study.

The information in Table 4 shows that the choice and consumption of whole bean coffee in Poland is mainly driven by its intense aroma and distinctive taste, its stimulating effect and the habit or pleasure derived from the coffee-making ritual itself. In addition, it should be noted that, according to the results of previous research, there is a growing awareness among coffee consumers in Poland, their knowledge of healthy lifestyles, nutrition or available coffee. The importance of taste and value of the product is increasing, and these needs are met to a greater extent by the least processed coffee, i.e. whole bean coffee. This coffee is often perceived as real, natural, traditional and strong with an intense taste, as opposed to cappuccino powder or 3-in-1 instant coffee.

Table 5 presents the characteristics of the five most important factors influencing the choice and consumption of instant cappuccino by Polish coffee consumers.

Table 5. Main product-related factors influencing the choice and consumption of instant cappuccino in Poland

No.	Factor	Description
1	This is a coffee to savour: it is like dessert and goes with dessert	Instant cappuccino is creamy, delicate, sweet, with lots of fluffy and tasty froth. Its consumers very often describe the taste of cappuccino as fabulous and delicious. The froth is the key to cappuccino coffee. The choice of different flavours is also important. Because of its creaminess, sweetness and frothiness, cappuccino coffee can be savoured: it can be sipped slowly and taking delight in every sip. It is a dessert in itself (sweet and creamy) and it also goes well with a dessert (a cake eaten alone or with another person). Instant cappuccino is drunk for pleasure and, according to the respondents, this pleasure should also be visible on the packaging.
2	Variety of flavours	Instant cappuccino consumers greatly appreciate the multitude of flavour variations in which cappuccino is available (vanilla, hazelnut, caramel and others). The ability to choose and obtain coffee with a flavour that is difficult to make at home makes instant cappuccino unique. A certain threat to cappuccino powder coffee may be the increasing presence of espresso machines in households. Some cappuccino consumers also drink whole bean coffee from the machine in the morning and add frothed milk to it. One respondent mentioned that he used to drink instant cappuccino, but since he bought an espresso machine, he sometimes makes cappuccino himself. However, making your own cappuccino with an espresso machine has a certain disadvantage: you cannot choose different flavours. It is therefore worth developing a range of cappuccino flavours and variations.
3	Quick and convenient	The speed and ease of preparation of Cappuccino powder coffee is one of the key reasons for buying it: it is tasty, has a variety of flavours and is quick to prepare (there is no need to remember all the necessary ingredients). Most consumers simply add hot water (some use boiling water while others remember to wait a little before pouring it, as it tastes better then). There are people who make this coffee with milk (for example, lactose-free), add cinnamon (in winter because it warms you up), sugar if they are not having dessert and it is not sweet enough for them, and sometimes make iced coffee on hot days (with extra milk and ice cubes). For the sake of convenience, it is also worth introducing new or seasonal cappuccino variations: for example, with cinnamon for the autumn/winter period, with lactose-free milk for those who are lactose intolerant, and perhaps even a vegan version (as some respondents used plant-based milk).
4	Milder than whole bean	Some instant cappuccino consumers also drink whole bean coffee in the morning for a boost, but there are also those who avoid it because they find it too strong in taste and too stimulating, with too much caffeine. For them, cappuccino coffee is mild because it contains more milk and less caffeine. In addition, the fluffy froth gives the impression of a light and delicate cappuccino.
5	Somewhat artificial	Some instant cappuccino users choose this coffee on a positive choice-basis: good taste - to savour, a wide choice of flavours, and quick and convenient preparation. However, there are also those who see cappuccino powder as a substitute for 'real' cappuccino made with an espresso machine at home or in a café. They use cappuccino for its convenience and delicacy (taste, strength). They consider instant cappuccino to be a processed product (it is powder and contains various flavouring additives). Cappuccino consumers are aware that it is a processed product, but its good taste and convenience are much more important to them. For some of them, an instant cappuccino seems more natural than a 3-in-1 instant coffee because of its visual lightness (froth) and the well-defined tastes in its flavour variations (this coffee tastes of vanilla, nut, etc.). For consumers concerned about the artificiality of cappuccino coffee, a freeze-dried version could be offered.

Source: own (qualitative) study.

The information in Table 5 shows that instant cappuccino is very often perceived by respondents as a dessert or an accompaniment to a dessert. The choice of this coffee is also influenced by its delicate taste and the multitude of flavours available. Speed and ease of preparation are also important. At the same time, previous research shows that instant cappuccino is increasingly perceived by consumers as a cheap, unnatural, high-calorie, unhealthy product, a 'coffee-like' drink rather than a real coffee, similar to 3-in-1 instant coffee.

Table 6 presents the characteristics of the three most important factors influencing the choice of 3-in-1 instant coffee by Polish consumers.

Table 6. Main product-related factors influencing the choice and consumption of 3-in-1 instant coffee in Poland

No.	Factor	Description
1	Quick and convenient to prepare	3-in-1 instant coffee consumers usually add hot water. Sometimes they add cinnamon or extra milk. 3-in-1 coffee can be prepared 'in a flash', in all conditions (including when travelling or camping), and there is no need to remember to have coffee additives at home: milk and sugar (the 3-in-1 coffee consumers usually like sweet coffee with milk). 3-in-1 coffee is 'mobile"; the sachet can always be taken with you. Some 3-in-1 coffee consumers also drink other coffees, including whole bean coffee, but use them only when they have more time and all the ingredients at home.
2	Balanced taste – good proportions of ingredients	For its consumers, 3-in-1 coffee has the ideal proportions of ingredients: coffee, milk and sugar. They can rely on it, it is predictable - they get the same taste they like every time. One respondent mentioned that sometimes, when his 3-in-1 coffee was not available where he usually shopped, he tried to recreate the taste himself with instant coffee, milk and sugar, but was generally unsuccessful.
3	Stimulating but not too strong	For its consumers, 3-in-1 instant coffee is suitably strong in terms of taste and caffeine content – it does not stimulate excessively and violently like whole bean coffee because it contains milk and less caffeine, but it gives them the energy they need to start the day and sustains it during work.

Source: own (qualitative) study.

The information in Table 6 shows that 3-in-1 instant coffee is chosen and consumed by respondents mainly because of its balanced and predictable taste – the fixed proportions of ingredients such as: coffee, milk and sugar. In the opinion of the respondents, it is also the easiest to prepare of the three coffee categories studied.

When analysing the results of the BBD study, it is also worth looking at the situations in which the analysed coffee categories are most often consumed by Polish consumers. The results of the study in relation to whole bean coffee are presented in Table 7.

Table 7. Main situations in which whole-bean coffee is consumed

COFFEE CONSUMED IN THE MORNING TO START THE DAY		
Situation	**What coffee gives you**	**How coffee works**
This is the coffee drunk at home in the morning before breakfast, with breakfast or just after breakfast. It is often black coffee, but there is no rule: some people add milk (for example, frothed milk) and even spices such as cinnamon.	Coffee 'wakes you up', i.e. it gives you a physical and mental boost. It motivates you to start the day and lifts your mood.	The stimulation comes from the caffeine, but also from the stimulating aroma and the distinctive taste of the coffee (even when milk is added). The ritual of making coffee itself also has a stimulating role, as it is associated with the invigorating effect of morning coffee. In this situation, the pleasure of drinking coffee is also important – attention is paid to its taste and aroma.
COFFEE CONSUMED TO STAY AWAKE DURING THE DAY/NIGHT		
Situation	**What coffee gives you**	**How coffee works**
Working the night shift, driving late at night, the need for intensive mental work, often involving sitting up late into the night, jet lag.	It keeps you physically and mentally stimulated by preventing you from falling asleep, yet allowing you to work intensely for hours.	Coffee is supposed to be stimulating, thanks to its caffeine, intense aroma and distinctive taste. This is the only situation in which drinking coffee is not about pleasure.
COFFEE CONSUMED WHEN PLANNING THE DAY		
Situation	**What coffee gives you**	**How coffee works**
This is the coffee drunk in the morning, before starting work (a sort of 'calm before the storm' of duties). There is a little more time than with coffee drunk for the morning boost, so the coffee can be more 'personalised'. It is usually drunk by the respondent alone, but they may be accompanied by a partner.	Coffee is used to calm down and relax before a busy day, to plan the day and to mentally prepare for work.	In this situation, the pleasure of drinking coffee is very important – its taste, aroma, appearance, additives and the way it is served.
COFFEE CONSUMED DURING A BREAK AS A 'MOMENT TO YOURSELF'		
Situation	**What coffee gives you**	**How coffee works**
It is a break from work, either at home, at work (even remotely in a 'home office') or after work. You have more time, you can add your favourite additives and you can drink your coffee slowly, savouring each sip.	Mental hygiene: momentary detachment from reality, being alone with yourself, 'resetting', gathering your thoughts and returning to the world with renewed mental energy. It also gives a sense of taking care of yourself - balancing time for others with time for yourself.	It is a coffee to be savoured and pampered: it is the taste, the aroma, the appearance, the additives, the way it is served and the packaging (which emphasises the uniqueness of the moment) that count.
COFFEE CONSUMED IN A SMALL GROUP (FOR EXAMPLE, DURING A MEETING WITH LOVED ONES)		
Situation	**What coffee gives you**	**How coffee works**
A meeting of a small group of close people (friends, family) at home or in a café. There is plenty of time and you can prepare and drink the coffee slowly, savouring the taste and the conversation during the meeting.	Coffee brings people together, strengthens bonds. It is a source of pleasure. Meeting in a café allows you to enjoy coffee that is difficult to make at home. Making coffee for guests allows you to demonstrate your expertise (barista at home) and boost your self-esteem.	It is a coffee that can be savoured (taste, aroma, way of serving, additives) and that can be made to stand out (packaging and unique way of serving: additives, tricks to create interesting effects, bringing out flavours are important).

Source: own (qualitative) study.

The information in Table 7 shows that whole bean coffee is most commonly consumed in Poland:

– in the morning, to start the day, as a stimulating drink;
– at any time, as a drink to help maintain concentration (to stay awake during the day/night);
– in the morning before work, as a form of relaxation while planning the day.

Table 8 shows the results of the study in relation to instant cappuccino.

Table 8. Main situations in which instant cappuccino powder is consumed

COFFEE CONSUMED DURING A BREAK AS A 'MOMENT TO YOURSELF'		
Situation	**What coffee gives you**	**How coffee works**
An extended moment of relaxation at home when no one is around (in the morning, when the children are asleep, after work). There is no rush, the cappuccino is drunk slowly, it can be savoured and accompanied by something sweet.	Instant cappuccino allows you to escape from the world for a moment, to relax, to focus on yourself and your sensory experience (the pleasure associated with drinking a cappuccino, savouring it like a dessert).	All the senses are important - taste, smell, touch, sight: creaminess, froth, sweetness, creamy texture, original flavours, but also the appearance of the packaging – this moment is a small luxury and the packaging should be elegant (gold elements, rich colours) and promise pleasure.
COFFEE CONSUMED DURING A WORK BREAK		
Situation	**What coffee gives you**	**How coffee works**
A moment of rest at work or in the home office, as many people work remotely. There is not much time to savour the taste.	Drinking an instant cappuccino gives you a moment of detachment from your duties, and thus refreshes your mind (gives you a mental boost) and allows you to be more productive after the break. In addition, the cappuccino is sweet/sugary or drunk with something sweet – this gives physical energy, which also translates into mental energy and better concentration at work.	Cappuccino is always associated with pleasure, but in this situation the aspects of indulgence, sensual pleasure and a moment of luxury are not as prominent as in a 'moment to yourself'.
COFFEE CONSUMED IN A SMALL GROUP (FOR EXAMPLE, DURING A MEETING WITH LOVED ONES)		
Situation	**What coffee gives you**	**How coffee works**
Getting together in a relaxed, completely informal atmosphere with those closest to you, such as an evening with your partner or a meeting with a friend. There is time to drink slowly and savour the coffee. The coffee is often accompanied by dessert.	It allows you to relax and bond with your loved ones.	There is time to savour the beverage, so the sensory experiences of taste, smell and texture are important. The variety of flavours is important – you can offer a guest a choice of flavours. This is a special moment, so elegant packaging (gold elements, rich colours) and the pleasure it promises are important.
COFFEE CONSUMED IN THE MORNING TO START THE DAY		
Situation	**What coffee gives you**	**How coffee works**
Instant cappuccino drunk in the morning with breakfast.	It provides energy as it is drunk with food, often sweet. It is part of a personal ritual to start the day.	Cappuccino is always a pleasure, but in this situation the aspects of savouring the taste, the froth and the uniqueness of the moment, which requires an elegant setting, are less important than in a 'moment for oneself'.

Source: own (qualitative) study.

The information in Table 8 shows that, unlike whole bean coffee, instant cappuccino is most commonly consumed in Poland:

– in a break from domestic activities as a ‘moment to yourself’;
– during a break at work;
– during a meeting with loved ones, social gatherings in a small group.

Table 9 shows the results of the study in relation to 3-in-1 instant coffee.

Table 9. Main situations in which 3-in-1 instant coffee is consumed

COFFEE CONSUMED IN THE MORNING TO START THE DAY		
Situation	**What coffee gives you**	**How coffee works**
Coffee drunk in the morning with breakfast, at work or at home. Often consumed in a hurry.	3-in-1 instant coffee stimulates both physically and mentally, thanks to its caffeine and sugar content, and also because it is combined with breakfast. Drinking this coffee is also a personal ritual to get ready to start the day.	Coffee with the right amount of caffeine (3-in-1 instant coffee users find whole bean coffee too stimulating), milk and sugar in a balanced proportion. Handy packaging that can be taken to work is also important.
COFFEE CONSUMED TO STAY AWAKE DURING THE DAY/NIGHT		
Situation	**What coffee gives you**	**How coffee works**
Working at night, preparing to leave for a business trip early in the morning.	The 3-in-1 instant coffee keeps you physically and mentally stimulated.	Coffee with the right amount of caffeine (3-in-1 instant coffee consumers find whole bean coffee too stimulating). Convenient packaging (handy sachets) is also important.
COFFEE CONSUMED DURING A WORK BREAK		
Situation	**What coffee gives you**	**How coffee works**
A short regenerating break in the office, at home or on a business trip, when you feel tired, lack energy and are unable to concentrate. In the summer, it can also be enjoyed as a cold version, by adding cold milk and ice cubes.	The 3-in-1 instant coffee provides a ‘quick recharge’ - a physical and mental boost thanks to caffeine and sugar. Because it is consumed during a break, it allows you to step away from work for a while, change your perspective and refresh your mind. As a result, you are more productive at work. In addition to its caffeine and sugar content, cold coffee is also physically refreshing.	The key is the right amount of caffeine (not too much) and sugar, which is also stimulating. It is also important that the packaging is practical, so that the 3-in-1 coffee can be taken to work and prepared quickly.
COFFEE CONSUMED DURING A BREAK AS A ‘MOMENT TO YOURSELF’		
Situation	**What coffee gives you**	**How coffee works**
A moment of relaxation at home or at work (not when energy and concentration are low). There is no need to rush, you can enjoy your coffee. On hot days, some people like to make their 3-in-1 coffee cold, with extra milk and ice cubes.	The 3-in-1 instant coffee allows you to relax and pamper yourself. If served cold with ice cream, as a dessert, it increases the pleasure even more.	The ideal proportions of coffee, milk and sugar are important for a balanced and satisfying taste. The design of the packaging is also important in this situation - the 3-in-1 coffee is not as enjoyable as a whole bean coffee or cappuccino, but it is meant to be a reward and a pleasure - the packaging should allude to this.
COFFEE CONSUMED IN A SMALL GROUP (FOR EXAMPLE, DURING A MEETING WITH LOVED ONES)		
Situation	**What coffee gives you**	**How coffee works**
Informal meeting with friends in a relaxed atmosphere. There is time to savour the coffee.	Coffee allows you to relax and get closer to other people.	The ideal proportions of coffee, milk and sugar are important for a balanced and satisfying taste. The design of the packaging is also important in this situation, as attractive packaging adds a touch of uniqueness to the gathering.

Source: own (qualitative) study.

The information in Table 9 shows that 3-in-1 instant coffee, like whole bean coffee, is most commonly consumed in Poland:

– in the morning, to start the day, as a stimulating drink,
– at any time, as a drink to help maintain concentration (to stay awake during the day/night),
– during a break at work.

The characteristics presented in relation to the selected coffee categories were further used by the authors of the article to complement the characteristics of the main coffee market segments in Poland. These segments were identified during the quantitative U&A study on a sample of 951 coffee consumers aged 18-65 using cluster analysis with SPSS software.

Results of the quantitative studies

Consumer behaviour (in addition to consumer demographics) should be a key criterion for segmenting the coffee market in Poland. Market segmentation based on consumer behaviour allows for a better understanding of consumer needs, preferences and buying habits, which in turn allows for more precise targeting and the adaptation of product offerings and marketing activities. On the coffee market, this segmentation can take into account the following factors:

– Taste preferences - consumers may prefer different types of coffee, such as Arabica, Robusta or flavoured coffees.
– Coffee quality - consumers may be interested in premium coffee made from high quality beans, while others may be looking for more affordable options.
– Coffee origin - some consumers prefer coffee from specific regions, such as South America, Africa or Asia.
– Method of preparation - segmentation can also include preferences for how coffee is prepared, e.g. espresso machine, coffee machine or coffee capsules.
– Lifestyle - consumers can be divided by lifestyle, such as takeaway coffee lovers, café enthusiasts or those who value traditional home preparation.

With this in mind, a quantitative study was conducted in parallel with the qualitative study on a nationwide sample of 951 coffee consumers in Poland. The results of the study allowed the identification of the main coffee segments on the coffee market in Poland, such as: “Social Gourmets”, “Practicals”, “Ordinaries”, “Pleasure Hunters” and “Energy Accumulators”, and to estimate their percentage share of the total coffee market (Table 10).

Table 10. Characteristics of coffee market segments in Poland

Segment name	Estimated share on the coffee market in Poland	Segment characteristics
Social Gourmets	29.23%	A predominantly female segment, with an over-representation of people aged 25-34 and 45-54. They are well educated and well off. They are looking for stimulation and pleasure – they drink coffee during the day. Drinking coffee is a social ritual for them. This is a group with a strong appreciation of whole bean coffee and, although they also reach for other coffee categories, they consider them inferior. They occasionally use 3-in-1 coffee and cappuccino powder when they feel like it. Instant cappuccino is also a dessert alternative for them. They value quality coffee, but make their purchases rationally, paying attention to price and looking for special offers. They like to buy whole bean coffee online, mostly through shopping platforms such as Allegro.
Practicals	24.61%	Male segment, with an over-representation of people aged 45+. Its representatives are more likely than others to live in rural areas, to have primary or vocational education and to work as skilled workers. They prefer whole bean coffee, but also consume, for example, instant cappuccino, which they perceive as a coffee for special occasions. They have a functional approach to coffee. For them, coffee is a multi-functional beverage - a means of calming down, a small indulgence to start the day off right, but also a healthy drink to quench thirst and aid digestion. They like to drink coffee with their meals. They consume ground coffee in the morning and whole bean coffee in the evening.
Ordinaries	20.19%	A segment that treats coffee as part of their daily routine. They mostly drink natural coffee and are less likely to use other types of coffee. They are satisfied with ordinary coffee, which is available in their shop at a good price. The segment is evenly balanced in terms of gender. Almost half of them are aged between 55 and 65. Their children have already left home – empty nests. This is the least educated segment with an average financial situation. They are the most likely to buy their coffee in discount stores, hypermarkets and supermarkets.
Pleasure Hunters	17.88%	Active people who enjoy drinking different types of coffee. This segment consists mainly of women and people aged 25-44. They are well-educated and working persons, often combining professional duties with parenthood. Coffee allows them to enjoy a little pleasure during the day. It is a moment to stop and take care of themselves. Outside the home, coffee accompanies them in their various activities – most often at work. They also like to drink 3-in-1 instant coffee and cappuccino.
Energy Accumulators	8.10%	Strongly male segment, with an over-representation of people aged 18-34. People in this segment like to drink natural coffee, whole bean and ground, while they are less likely to use 3-in-1 instant coffee and cappuccino powder. Coffee is a natural energiser for them, allowing them to stimulate themselves in the morning and boost their energy during physical exertion. When choosing a coffee, they are guided not only by its taste but also by its strength.

Source: own (quantitative) study.

The information in Table 10 shows that for those in the first identified segment, 'Social Gourmets', coffee is a means of providing energy during the day. However, they are not addicted to coffee, they drink it when they feel like it. It is a moment of pleasure and an opportunity to talk and strengthen bonds with the people who are important to them. People in this group are mainly women:

- aged 25-34 and 45-54,
- with secondary and higher education,
- married, living in 2-4 person households (in this respect they do not differ from the general consumer population),
- earning between PLN 3,000 and PLN 10,000 (evenly distributed among cohorts of PLN 3,000-5,000; 5,000-7,000; 7,000-10,000). These are mostly people who rate their financial situation as good, with the ability to set aside money for unexpected expenses, or as average,
- having a permanent job (7 out of 10 people in this segment have a permanent job). More often than in the other segments, we find here professionals with higher education - freelancers - and less often skilled workers,
- almost 10% of them are students.

Table 11 provides detailed characteristics of the 'Social Gourmet' segment, taking into account the key behaviours of people in this segment at the stage of choosing, buying and consuming coffee in relation to whole bean (natural) coffee and the processed coffee categories – cappuccino powder and 3-in-1 instant coffee.

Table 11. Selected characteristics related to the 'Social Gourmets' segment

Specification	SELECTED CHARACTERISTICS OF THE SEGMENT	
	Natural coffee category (including whole bean coffee)	**Processed coffee category (including instant cappuccino and 3-in-1 coffee)**
Choosing coffee	– The most important factor in choosing a whole bean coffee is the right price and availability on special offer. Consumers are less attracted to 'expert' factors such as the degree of roasting or the origin of the beans. Although taste is important to people in this segment, they behave rationally at the point of sale, looking for the best deal.	– When choosing a 3-in-1 coffee, the most important factors are: in-store availability, the right price, followed by intensity and availability on special offer. – In the cappuccino category, the most important selection factors are in-store availability, availability of the favourite flavour, the right price and availability on special offer.

Table 11. Continued

Buying coffee	– The 'Social Gourmets' are more likely to buy whole bean coffee online - almost 35% of this segment do so. They are the most likely to buy through shopping platforms such as Allegro or Amazon, although they also like to buy from specialist online coffee shops. As in other segments, the main channel of purchase remains the physical shop. Almost 80% buy whole bean coffee there. Discount stores (80%) are the most frequently indicated physical place to buy whole bean coffee across all segments. They buy most often once a month. – Ground coffee is most often bought in a physical shop, with 96% of this segment doing so. As many as 80% of those who buy this type of coffee do so in discount stores. More than half of them buy ground coffee once every 2-3 weeks or once a month.	– 3-in-1 coffee and cappuccino powder are categories that are less popular with the 'Social Gourmets', so they buy them less frequently than whole bean coffee. One in four of the segment's 3-in-1 coffee drinkers buy coffee once every three months or less. They buy instant cappuccino at a similar frequency. – Both types of coffee are most likely to be bought in a physical outlet, mostly at discount stores.
Consuming coffee	– The 'Social Gourmets' are the most likely to choose natural coffees. Whole bean coffee is consumed by 63% and ground coffee by 68%. Consumption of whole bean coffee is at the same level as for the general population of coffee consumers studied. They most often drink whole bean coffee every day, but less often than the other segments. – Whole bean coffee is a high quality coffee category for them, close to the quality of coffee in a café. It is also distinguished by its aroma. They also perceive whole bean coffee as the real strong coffee. – For the 'Social Gourmets', natural coffee is a source of energy during the day. They reach for it during breaks at work – it improves their mood and is a source of pleasure. The most common occasion for drinking natural coffee is at social gatherings – both at home and away from home. – Their most favourable brand of whole bean coffee is Lavazza (57%) for its high quality, intense taste and aroma. They are also more likely to drink Costa coffee (20%) than coffee consumers in general. – They most often choose Tchibo ground coffee (55%), mainly because of the good price, habit and special offers. A similar percentage choose Jacobs (52%) for its taste and aroma.	– The 'Social gourmets' consume 3-in-1 instant coffee and cappuccino powder, but these types of coffee are less likely to be consumed than whole bean coffee. In the last three months, the above-mentioned coffee categories were consumed by around 25% of people in this segment. Just over 50% of the people in this segment had tried them in the past but did not drink them regularly. – For this segment, 3-in-1 coffee and instant cappuccino are more like coffee drinks than coffee – processed drinks, but mild in taste and gentle in effect. According to the respondents, these coffees are suitable for seniors and young people. – The 'Social gourmets' turn to these coffee categories when they feel like drinking coffee with a particular flavour. They also drink 3-in-1 coffees more often to boost their energy during the day and to have some time to themselves. On the other hand, instant cappuccino is an alternative to dessert. In this segment, 3-in-1 coffees are most often consumed during a long relaxation or short break, while cappuccinos are used for special occasions and when visiting someone at home. – The most popular brand of 3-in-1 instant coffee in this segment is Nescafe, chosen by over 69% of the segment. – The most popular brand of instant cappuccino in Poland is Mokate, chosen by almost 67% of the 'Social Gourmets' who drink cappuccino. This is much higher than in other segments.

Source: own (quantitative) study.

The information in Table 11 shows that the ‘Practicals’ is a market segment where consumption of natural coffee (especially ground coffee) is predominant. They have a functional approach to coffee. For people in this segment, coffee is a multi-functional drink that helps to put them in a good mood, but it is also good for their health, quenches their thirst, warms them up and calms them down. People in this segment are mainly men:

– aged 45-65,
– with primary or secondary education,
– living in rural areas (more than 48% - the highest of the segments analysed),
– married/partnered - mostly 2-3 person families, less often with young children (aged 0-4), more often with older children aged 15-18,
– assessing their financial situation as average (less likely than other segments to be able to set aside small amounts of money for unforeseen expenses). Their household income is most often in the range of PLN 3,000-5,000 and PLN 5,000-7,000,
– almost 2/3 of people in this segment have a permanent job, mostly as a skilled worker. One in five is already retired or on a benefit pension.

Detailed characteristics of the ‘Practicals’ segment are shown in Table 12.

Table 12. Selected characteristics related to the ‘Practicals’ segment

Specification	SELECTED CHARACTERISTICS OF THE SEGMENT	
	Natural coffee category (including whole bean coffee)	**Processed coffee category (including instant cappuccino and 3-in-1 coffee)**
Choosing coffee	– The most important factors in choosing natural coffees (including, in particular, whole bean coffee) for this segment are related to the taste and strength of the coffee. Coffee intensity, aroma and taste were identified as the most important factors.	– When choosing a 3-in-1 instant coffee, the most important factors are the well-known brand and the intensity of the coffee. Compared to other segments, recommendations from friends play a greater role. When choosing an instant cappuccino, the ‘Practicals’ are most concerned with the variety of flavours and the right ratio of ingredients. They are more likely than others to look for cappuccinos with added magnesium and in disposable sachets. – Celebrities, bloggers and influencers have a strong influence on the purchasing decisions of people in this segment.

Table 12. Continued

Buying coffee	– The 'Practicals' are the most likely to buy whole bean coffee in physical shops - almost 81% do so. This type of coffee is bought online by almost 27% of people in the segment. This type of coffee is much less likely to be bought in discount stores, although this is still the most popular type of physical store, with almost 60% of people in this segment buying coffee there. This segment is the most likely to buy whole bean coffee in smaller delicatessen shops. People in this segment who buy whole bean coffee online mostly do so through shopping platforms such as Allegro or Amazon, while they are significantly less likely than other segments to buy this type of coffee from specialist online shops. – Almost 88% of people in the segment buy ground coffee in physical shops - the lowest of all segments. However, they are much more likely to buy this type of coffee from online shops, with one in five doing so. They are less likely than others to buy coffee in discount stores and supermarkets, but these remain the most important places to buy. Online, like other coffee consumers, they buy ground coffee most often through shopping platforms. Both categories of natural coffee are most often bought once every 2-3 weeks or once a month.	– The 'Practicals' are the most likely of all segments to buy 3-in-1 instant coffee and cappuccino powder online. Respectively, 33% and 23% of consumers in this coffee category do so. Although they are significantly less likely to buy these types of coffee in physical shops, it is also the most popular channel for this segment. Almost 74% of 3-in-1 coffee consumers buy this type of coffee in physical shops. For instant cappuccino, the figure is 81%. – In terms of physical outlets, more than 2/3 of people in this segment buy 3-in-1 coffee in discount stores (68%), followed by delicatessen shops (35%). In this segment, instant cappuccino is most frequently bought in discount stores, but this is a significantly lower percentage than the general population of coffee consumers (57%, -17 p.p. compared to the whole group). – Online, both 3-in-1 coffee and instant cappuccino are most commonly bought through shopping platforms, with 61% and 77%, respectively. – Cappuccino powder is bought once a month (20% of people in this segment) or once every 2-3 weeks. 3-in-1 coffee is bought slightly more frequently. Almost 24% buy this type of coffee once a week and another 24% every 2-3 weeks.
Consuming coffee	– The 'Practicals' are the most likely to drink ground coffee (74%). Whole bean coffee is consumed by 59% of this segment. – Whole bean coffee is drunk once a day or more often by more than 40% of people in this segment, while ground coffee – by 56%. In this segment, we observe significantly more people who drink ground coffee four times a day or more often (12%, +5 p.p. compared the general population of coffee consumers). – The 'Practicals' have a special appreciation for natural coffee – they are more likely than others to describe it as mild in taste and effect, but also as a sign of a higher standard of living. – Natural coffees meet many practical needs – they are drunk to start the day off right, for relaxation, health and enjoyment, and to wash down a meal. They also use ground coffee to warm themselves up, refresh and quench their thirst. They are the most likely to consume natural coffees with meals: ground coffee with breakfast and dinner, and whole bean coffee with supper. They most often choose Jacobs whole bean and ground coffee for its intense, rich aroma and high quality, and less often Lavazza in beans because it is too expensive for them. People in this segment like ground coffee such as Tchibo, MK Cafe or Prima.	– 3-in-1 instant coffee and cappuccino powder are consumed by 25% and 26% of the segment, respectively. 13% of people in this segment drink coffee from each of these categories once a day or more often. In fact, there are more people in this segment who have never tried these types of coffee. – The 'Practicals' is the only segment that perceives 3-in-1 coffee and instant cappuccino as close to coffee from a café in terms of quality. Both also evoke associations with a higher standard of living. – The 'Practicals' very often choose 3-in-1 coffee and instant cappuccino instead of dessert. They also consume cappuccino for the company and to fill the stomach. Both coffee categories are more likely to be consumed with breakfast and dinner than in other segments. – The most popular 3-in-1 coffee brand in this segment is Nescafe (45%). Among instant cappuccinos, the most popular brand is Mokate (38%).

Source: own (quantitative) study.

Coffee consumers in the next identified segment, the ‘Ordinaries’, most often drink coffee out of habit and routine. For them, coffee is a source of stimulation. However, unlike other segments of the coffee market in Poland, the association with relaxation is less strong. People in this segment are:

- both men and women (the segment is gender balanced),
- most are aged 55-65 – they account for 44% of the segment (almost twice the proportion of the total population of coffee consumers in Poland). The segment is also over-represented by people aged 35-44. On the other hand, there are far fewer people under the age of 34,
- residents of both large cities and small towns, as well as rural areas - in terms of place of residence, the distribution does not differ from the general population,
- mostly with vocational education - the ‘Ordinaries’ is the least educated segment,
- mostly married (although there are more divorced or widowed here), living in 2- or 3-person households. They are significantly more likely than other segments to have no children under the age of 26,
- whose household income is most often in the range of PLN 3,000-5,000 and PLN 5,000-7,000. They do not differ from the general population of coffee consumers in Poland. It is a segment that describes its financial situation as average or good,
- most often working as skilled workers or white-collar workers. This group also has the highest proportion of retirees/ pensioners (28%) and the lowest proportion of people with a permanent job (55%).

Detailed characteristics of the ‘Ordinaries’ segment are shown in Table 13.

Table 13. Selected characteristics related to the ‘Ordinaries’ segment

Specification	SELECTED CHARACTERISTICS OF THE SEGMENT	
	Natural coffee category (including whole bean coffee)	**Processed coffee category (including instant cappuccino and 3-in-1 coffee)**
Choosing coffee	– For consumers in this segment, the most important factors in choosing natural coffee (mainly ground) are the price range and availability where they usually shop. Representatives of this segment gave these answers the highest importance of all the market segments identified. They ranked factors such as country of origin or brand of coffee producer significantly lower. Social proof – recommendations from friends or coffee experts – was also less important to them. – For whole bean coffee, the most important selection factor for coffee consumers in the ‘Ordinaries’ segment was the intensity of the coffee (taste, aroma). They also gave significantly higher importance to the following factors: price range, pack size, taste profile, in-store availability, degree of roasting of the coffee beans, well-known brand. They were more willing than others to consume 100% Arabica coffees.	Due to the low level of purchases, it is not possible to provide precise characteristics of their choices made in relation to these coffee categories.

Table 13. Continued

Buying coffee	– The 'Ordinaries' are the most likely of all segments to buy whole bean coffee once a month, with 43% of them doing so. Almost 82% buy this type of coffee in a physical shop and 29% buy it online. The 'Ordinaries' are also the most likely (compared to other identified segments) to buy whole bean coffee in discount stores. They are less likely than others to buy coffee in specialist shops, petrol stations and electronics shops. – 2/3 of the segment buy natural coffee once a month or once every 2-3 weeks. The 'Ordinaries' segment is characterised by the highest percentage of people who buy ground coffee in a physical shop - 97%. Almost 81% of people in this segment buy coffee in discount stores - this is the highest figure shared with the 'Social Gourmets'.	– People in the 'Ordinaries' segment rarely choose coffee other than natural. When they do, they make their purchases in physical stores (100%) and only sometimes buy these coffee categories online. In both cases, discount stores are the most popular, followed closely by small local shops.
Consuming coffee	– The 'Ordinaries' are the most likely to drink ground coffee. It is consumed by 69% of this segment. Other types of coffee are consumed by a significantly lower percentage compared to other segments, with whole bean coffee being consumed by 52%. – Those in this segment consume ground coffee slightly more frequently than others, with almost 30% drinking it 2-3 times a day or more. Whole bean coffee drinkers consume coffee with a similar frequency to the general population of coffee consumers in Poland (2-3 times a day or more – 22%). – For people in this market segment, whole bean coffee represents high quality, real and fresh coffee. – The 'Ordinaries' drink natural coffee most often to wake up and as part of their daily routine. – Consumers in this segment are the most likely to drink Lavazza, Jacobs, Tchibo, MK Cafe and Dallmayr natural coffees, but they do not stand out regarding the intensity of drinking any of these brands. Among the ground coffees available on the Polish market, they also choose the Woseba and Prima brands.	– People in the 'Ordinaries' segment are the least likely to buy 3-in-1 instant coffee (11%) and cappuccino powder (10%). Due to the low level of purchases, it is not possible to provide precise characteristics of the consumption for these coffee categories.

Source: own (quantitative) study.

People in the next segment - 'Pleasure Hunters' - most often drink coffee to start the day off right and to put themselves in a good mood. Coffee is a source of morning energy for people in this segment, but they are very different from other segments in that coffee is a moment to themselves where they can savour the taste. This segment is also significantly more likely to report consuming all types of coffee – from whole bean to 3-in-1 instant coffee and cappuccino powder. The vast majority of these coffee consumers are women (59%), with the following demographics:

– aged 25-44 - 72% (those aged 45+ are the smallest group of all segments),
– with higher education (39%) - a total of 82% of people in this segment have secondary or higher education,
– with children (72% of all people in this segment) - compared to the general population of coffee consumers in Poland, there are significantly more parents of

children aged 0-14 in this segment. People in this segment mostly live in families of 3-4 people, married/partnered,
- with a permanent job (77%). Overall, more than 85% of this group are economically active (either in a permanent or casual job). People in this segment are the most likely to be employed in white-collar jobs, as middle and senior managers. One in five people in this segment is a skilled worker,
- people who have an average or good assessment of their own financial situation, the household income of people in this segment is most often in the range of PLN 5,000-7,000, PLN 7,000-10,000 and over PLN 10,000.

Detailed characteristics of the 'Pleasure Hunters' segment are shown in Table 14.

Table 14. Selected characteristics related to the 'Pleasure Hunters' segment

Specification	SELECTED CHARACTERISTICS OF THE SEGMENT	
	Natural coffee category (including whole bean coffee)	**Processed coffee category (including instant cappuccino and 3-in-1 coffee)**
Choosing coffee	– For this segment, as for coffee drinkers in general, the most important selection factors are the intensity of the coffee's taste and aroma, price range and availability on special offer. – For whole bean coffees, the following selection factors are slightly more important for this segment: recommendation of coffee for the coffee machine owned, recommendation by friends, recommendation by celebrities, bloggers and visually appealing packaging.	– For instant cappuccino, price is less important, while recommendation by celebrities, influencers, attractive packaging and the availability of single sachets are more important.
Buying coffee	– In the case of the 'Pleasure Hunters', as in other segments – whole bean coffee is mainly bought in physical shops (78%). The most common outlets are discount stores, hypermarkets and supermarkets. The 'Pleasure Hunters' are slightly more likely to buy whole bean coffee online – almost 36% of people in this segment do so. Online shopping is most likely to be done through shopping platforms such as Allegro or Amazon, rather than specialist coffee shops. The 'Pleasure Hunters' are the most likely to buy coffee once a month (28%). – People in this segment are the most likely to buy ground coffee in physical shops – almost 91% do so. This does not differ from the general characteristics of all coffee consumers studied in Poland. These purchases are mainly made in discount stores and large-format stores (supermarkets and hypermarkets). Almost half of the people in this segment buy ground coffee once every 2-3 weeks or once a month.	– 3-in-1 instant coffee and cappuccino powder are most commonly bought in physical shops (93% and 91%, respectively). Discount stores are the main channel of purchase. About 1/3 of people buy coffee of the above- mentioned category in supermarkets and hypermarkets, and also in smaller shops such as Społem, Delikatesy, ABC, Żabka.

Table 14. Continued

Consuming coffee	– The 'Pleasure Hunters' most often drink natural coffees. Whole bean coffee is consumed by over 78% and ground coffee by almost 81%. This is a significantly higher percentage than among the general population of coffee consumers studied. – In this segment, whole bean coffee is drunk more often than among coffee drinkers in general. Almost 1/3 of people in this segment drink it 2-3 times a day or more often. Ground coffees is consumed with a frequency similar to that of the general population of coffee consumers in Poland. – At home, whole bean coffee is most often consumed in the morning to start the day. It is drunk on this occasion by 58% of this segment. This is significantly higher percentage than for coffee consumers in general. Outside the home, a significantly higher proportion than the other segments consume whole bean coffee at work (57%), as well as in a café/restaurant (57%), while travelling (36%) and during outdoor activities such as walking (18%). – The 'Pleasure Hunters' are characterised by a higher percentage of ground coffee drinkers than the other segments, both at home to start the day (57%) and at work, where this type of coffee is drunk by 2/3 of this group (by far the highest of any segment). – When it comes to whole bean coffee, this segment, like coffee consumers in general, is the most likely to use Jacobs and Lavazza (45% each). On the other hand, they are much more likely to consume Dallmayr, Segafredo and Starbucks coffees.	– The 'Pleasure Hunters' are the segment with the highest percentage of people who say they drink 3-in-1 instant coffee and cappuccino powder. In the last 3 months, 46% and 44% of people in this segment, respectively, have reached for them. This is by far the highest of the groups analysed. – Compared to others, this segment is the most likely to drink 3-in-1 coffee and instant cappuccino - almost 20% consume these coffee categories once a day or more. – 3-in-1 coffee drinkers are significantly more likely than the general population of coffee consumers to drink this type of coffee at work (51%), when taking a break and having a moment to themselves, and when travelling (27%). – The most commonly consumed 3-in-1 coffee brands are Nescafe, Mokate and Jacobs. Their usage is close to the level characteristic of the general population of coffee mix drinkers. – Instant cappuccino is also consumed more often at work (42%) than in the other segments. The main reason for drinking it is to have a moment for oneself. More often than among coffee consumers in general, coffee is seen as an alternative to dessert. – In the past year, this segment, like the general population of instant cappuccino drinkers, consumed Mokate (61%), Nescafe (41%) and Jacobs (34%) coffees most frequently.

Source: own (quantitative) study.

For the last of the identified coffee market segments in Poland, 'Energy Accumulators', coffee is mainly an energy shot. People in this segment consume it to wake up and to boost energy during and after physical exertion. Coffee allows them to improve their mood and regain mental clarity. This is a segment with a clear over-representation of men. These are mainly people with the following characteristics:

- aged 18-34 (47%). There are also significantly more people aged 25-34 in this group, almost 1/3,
- with the lowest percentage of married people. They are the most likely to live in 2-3 person households. Singles are also much more likely to be found here,
- most often with a permanent job. There are also slightly more students. The majority of this segment are people with a higher or secondary education. White-collar and trade and service workers are more common here than in the other segments,
- this group has the highest number of people who describe their financial situation as average. They are more likely than others to report a net household income in the range of PLN 3,000-5,000.

More detailed characteristics of the 'Energy Accumulators' segment are shown in Table 15.

Table 15. Selected characteristics related to the 'Energy Accumulators' segment

Specification	SELECTED CHARACTERISTICS OF THE SEGMENT	
	Natural coffee category (including whole bean coffee)	**Processed coffee category (including instant cappuccino and 3-in-1 coffee)**
Choosing coffee	– For them, the most important factors when choosing whole bean coffee are caffeine content, intensity of taste and aroma, and price range. – In the case of ground coffee, the most important selection factor for representatives of this segment is the intensity (taste and aroma) and strength of the coffee (the latter factor was significantly more important for them than for coffee consumers in general). The price range and availability where they shop are also important factors.	Due to the small size of the segment, it is not possible to give precise characteristics of consumer choice in these coffee categories.
Buying coffee	– The 'Energy Accumulators' mainly buy whole bean coffee in physical shops, although one in five buy whole bean coffee online. Physical shoppers are the most likely to buy whole bean coffee in discount stores, while online they buy through shopping platforms such as Allegro or Amazon. Almost 42% of representatives of this segment buy this type of coffee once a month. – Ground coffee is most often bought in a physical shop, with almost 93% of this segment doing so. They buy it most often in discount stores. This type of coffee is most often bought once a month or once every 2-3 weeks.	– 3-in-1 instant coffee is usually bought once every 2 months, as is cappuccino powder. – 3-in-1 instant coffee is most often bought in physical shops. Discount stores are the most common place to buy, although the 'Energy Accumulators' buy there less frequently than other segments. Compared to others, this segment is more likely to buy this type of coffee in smaller shops such as delicatessens. – Instant cappuccino is also bought by 'Energy Accumulators' mainly in physical shops. The 'Energy Accumulators' buy it in discount stores - this segment is the most likely to choose this type of outlet to buy an instant cappuccino.
Consuming coffee	– The 'Energy Accumulators' are the most likely to consume ground coffee, followed closely by whole bean coffee and instant coffee. Half of this segment drink natural coffee once a day and more often. – Their perception of natural coffee is similar to that of the general population of coffee consumers – they see whole bean coffee as high quality, aromatic and fresh. They are characterised by their perception that whole bean coffee has a mild effect. – For them, natural coffee is an energy booster – they drink it in the morning to wake up and during physical exertion. Coffee also accompanies them at social gatherings. They are much less likely to drink coffee for breakfast than the other segments. – They most often choose Jacobs whole bean coffee for its intense aroma and, in their opinion, high quality. They consume MK Cafe whole bean coffee more often than the other segments. They value it for its taste, although a significant percentage drink it out of habit. – Their most popular whole bean coffee brand is Jacobs. They value it for its rich/intense taste and aroma, and also say that it is the coffee that stimulates them the most.	– The 'Energy Accumulators' do not deviate from the average consumption pattern of 3-in-1 instant coffee and cappuccino powder. – Due to the small size of the segment, it is not possible to provide precise consumption characteristics for these coffee categories.

Source: own (quantitative) study.

The presented results of the quantitative study and the presented characteristics of the coffee market segments in Poland can be a solid basis for an effective marketing strategy of coffee producers and distributors operating in Poland, as it will allow them to fine-tune products, marketing campaigns, distribution channels and other activities to the specific needs and expectations of different consumer groups, which should result in increased customer satisfaction, loyalty and sales.

Discussion and conclusions

The analysis of the literature, as well as the available research reports, clearly shows that the coffee market is dominated by pro-consumer behaviour among the majority of Poles (Maciejewski, Mokrysz, Wróblewski, 2018; 2019; 2020; Zalega, 2011; Zakrzewska, 2022). They are characterised by a strong attachment to traditional coffee categories – especially ground coffee and instant coffee, which are most commonly consumed at home (Maciejewski, Mokrysz, Wróblewski, 2020). At the same time, there is a growing number of consumers who want to prepare a cup of coffee at home which is no worse than that served in cafés – product innovation is becoming increasingly important (Maciejewski, 2015; 2016). At the root of this new consumption are, on the one hand, new, previously inexperienced needs (new types, tastes or ways of serving coffee) and, on the other hand, new, until recently unknown objects used to satisfy these needs (for example, modern, highly advanced equipment for preparing coffee or coffee drinks at home). Easy access to goods and services, their unlimited quantity and the rising standard of living of the population have resulted in an increase in coffee consumption in Polish households, which, in turn, is reflected in the growing number of coffee producers and distributors in Poland.

Comparing the results of the research presented in the article with previous findings by other researchers, it can be said that the coffee market in Poland is developing dynamically. Changes in the coffee market share by segment and the directions of these changes are shaped by a variety of factors, including changing consumer preferences and behaviour, technological innovation and global trends (Yllescas et al., 2022). According to the authors, the main directions of development in the coffee market in Poland include:

- Further growth in consumption: Poles are drinking more and more coffee, which is reflected in the increase in coffee consumption per capita. Both the number of cafés and the number of takeaway coffee outlets are increasing, which is further evidence of the beverage's growing popularity. Interestingly, the increase in coffee consumption in Poland was significantly influenced by the COVID-19 pandemic. The closure of cafés and restrictions on catering operations have led to an increase in coffee consumption at home. As a result, retail and online coffee sales have increased significantly (Coffee consumption: the evolution of consumer habits in the face of the Covid-19 pandemic).

- Growing diversity of preferences: Polish consumers have very different preferences when it comes to the category of coffee they consume. As the research results presented show, both traditional methods of coffee preparation (whole bean, ground or instant) and modern solutions such as capsules, pods and espresso machines are still very popular.
- Growing interest in higher quality coffee: the so-called 'specialty' coffee, i.e. high-quality coffee that has been carefully grown, harvested and processed, is growing in importance. The growth of independent cafés and coffee roasters offering coffee from small, sustainable plantations is also contributing to this trend. The growing importance of 'specialty' coffee is also highlighted by a five-year study conducted in South America. Using the theoretical framework of Constructivist Market Studies (CMS), Leme, Maciel and Souza (2024) indicated the development of the speciality coffee market in Brazil. This is also confirmed by the study conducted in Indonesia by Pratam, Dewi and Artini (2020). These researchers highlighted the growing interest in quality coffee in this country, particularly among well-educated men.
- A growing 'café culture': the market for cafés, both chain cafés (e.g. Starbucks, Costa Coffee) and local, independent cafés, is growing rapidly in Poland (Wróblewski, Mokrysz, 2017; 2018). This may be indicative of a growing culture of coffee drinking outside of the of home, and a greater interest in quality coffee. Cafés are becoming places for socialising, working and relaxing. Consumers are increasingly looking for unique coffee experiences, which, in turn, drives cafés to offer a variety of coffee drinks and innovative brewing methods (Coffee traditions in Poland and the world).
- Increased environmental and social awareness (sustainable development): coffee certifications such as Fair Trade or Rainforest Alliance, which ensure that coffee is produced ethically and sustainably, are becoming increasingly popular in Poland. There is also a growing interest in environmentally friendly packaging and sustainable practices throughout the coffee supply chain. This is also confirmed by the previous findings of the authors of this article. Research conducted by Maciejewski, Mokrysz and Wróblewski in 2018 confirms the high importance of sustainable values in the purchasing decisions of coffee consumers. Their study identified segments of coffee consumers for whom values such as environmental protection, ethical producer behaviour and Fair Trade are important when buying coffee (Maciejewski, Mokrysz, Wróblewski, 2019). This is also consistent with the findings of researchers from Italy and New Zealand who conducted studies in relation to developing countries. Catturani, Nocella, Romano and Stefani (2008) studied the impact of globalisation on the coffee market and proposed the Fair Trade policy as a strategy for small coffee producers. Fair Trade is presented as a way to decommodify coffee through ethical product differentiation, which can lead to better trading conditions for producers in developing countries.

- Development of new technologies: the coffee market in Poland is benefiting from technological innovations, which are also changing consumer behaviour on the market (e.g. the development of new brewing methods such as cold brew, nitro coffee, the introduction of smart coffee machines and mobile applications for ordering coffee). Consumers in Poland are increasingly investing in modern brewing equipment such as espresso machines, aeropresses and chemexes, which allow them to prepare coffee of café quality at home. The findings by the authors are consistent with those of researchers who have conducted segmentation studies of other domestic coffee markets. Teresa de Noronha Vaz and Lucia de Paula Urban (2011) analysed the organisational aspects of coffee market development in Brazil. Their research shows that innovation, coffee market segmentation and product differentiation on this market are key to the competitiveness of coffee producers and distributors not only on the domestic market, but also internationally.
- Increased coffee knowledge (education and awareness): there is a growing interest in coffee education. Barista courses, coffee tasting (cupping) and coffee festivals contribute to increasing consumer knowledge and awareness of different aspects of coffee. Consumers are more willing to learn about different brewing methods, taste profiles and coffee origins, which is reflected in their purchasing decisions (Zakrzewska, 2022).

The results of the qualitative and quantitative studies presented in this article may be particularly useful for both producers and distributors operating within the supply side of the coffee market in Poland. The main benefits of the presented characterisation of coffee consumer behaviour, the description of changes in this behaviour or the identified coffee market segments are likely to be of great help in:

- Optimising the product range. The segmental characteristics contained in the article will allow coffee producers and distributors to better tailor their products and services to the expectations of different customer groups, which should increase customer satisfaction and loyalty. The market segment analysis presented can also help to better manage the product range, as coffee producers and distributors can focus on developing the products that have the greatest potential in a given market segment, leading to the more efficient use of resources and cost reductions.
- Developing more effective marketing communication strategies. Thanks to the segmentation presented in the article, actors on the supply side of the coffee market can develop more precise and effective communication and distribution strategies. By understanding the specific needs and preferences of different consumer groups, they can create personalised advertising campaigns that better reach their target audiences.
- Increasing competitiveness. The characteristics of the identified coffee market segments presented in the article enable coffee producers and distributors to better position their products on the market and differentiate them from those of their competitors. This enables them to com-

pete more effectively by offering unique values and product features that are particularly important to specific customer groups.
- Increasing profitability. By focusing on the most promising segments, coffee producers and distributors in Poland can better allocate their production and distribution resources, thereby maximising return on investment and minimising wastage. Targeting products and marketing activities to well-defined segments should lead to higher margins and better exploitation of market potential.
- Introducing innovations. A deeper understanding of the different market segments can inspire actors on the supply side of the coffee market in Poland to introduce innovations that better respond to specific customer needs. These may include new coffee tastes, brewing methods, packaging methods or additional services.

In conclusion, the segmentation of the Polish coffee market presented in this article can bring many benefits, such as better matching the offer to consumer needs, increasing the effectiveness of marketing activities, improving competitiveness and optimising resource management and innovation.

Author Contributions

Conceptualization, S.M.; methodology, S.M., Ł.W.; software, Ł.W.; validation, Ł.W., S.M.. and A.K.; formal analysis, Ł.W. and P.M; investigation, Ł.W.; resources, S.M.; data curation, S.M.; writing—original draft preparation, Ł.W.; writing—review and editing, Ł.W., P.M.. and A.K.; visualization, Ł.W.; supervision, S.M. and P.M.; project administration, Ł.W. and S.M.; funding acquisition, S.M. All authors have read and agreed to the published version of the manuscript."

Declaration of competing interest

There is no financial and personal relationships with other people or organizations that could inappropriately influence (bias) our work.

Funding

The research was supported by MOKATE Group SA. However, the support provided did not have any impact on the research results, the method of presenting the results or the conclusions reached.

Acknowledgements

The authors would like to thank MOKATE Group SA for their support and provided materials.

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