



# Trends in Poles' Nutritional Habits

2017 Edition

3 x I: **I**nformation, **I**nspiration → **I**nsights

Syndicated research report & workshop offer



**Ipsos Marketing**

June 2017





# 3 x I: Information, Inspiration → Insights

*Trends in Poles' Nutritional Habits* is the best compendium of knowledge about the nutritional habits of Polish consumers. It is:

- **INFORMATION** = Comprehensive base of knowledge valued by key clients in FMCG industry, **available in the report**
- **INSPIRATION** = Unique starting point to generate **INSIGHTS** for your brands, which can be used for communication and new products development, available if you purchase the **workshop**

2017 edition offers:

## INFORMATION:

- Source of knowledge about penetration and usage frequency of dozens of food product categories.
- Detailed portraits of key consumption occasions
- Socio-demographic profiles of the users of various food product categories.
- The most important nutrition- and health-related trends – possibility to track these trends going back as far as 2005.

**You will get all of it in the report.**

## INSPIRATION → INSIGHTS:

- Rich base of inspirational facts about users of your category is a great starting point for creating new ideas.
- The most experienced tutors (quantitative or qualitative department directors) will prepare and conduct a tailor-made creative workshop for your brands.
- The purpose of the workshop will be to generate insights for your brand; depending on your needs, the insights will be used to develop communication or new products.

**We will work on it together, if you decide to buy a workshop.**





# What will be included in the report and what to do with it?

## INFORMATION, INSPIRATION → INSIGHTS

### INFORMATION:

- Is your product's category growing or shrinking? What is the current penetration and consumption frequency of the categories that interest you, and how are they trending?
- Do you have basic information about the consumers of your category? Are they really only women age 24-45 living in big cities?
- Are you considering positioning any products in the area of health/ well-being? Do you know how many Poles really take health into consideration when choosing food products? How many of them are overweight and want to change this situation?
- What are the key changes in the nutritional styles of Poles which you could use to grow your business?

**You will get all of it in the report.**

### INSPIRATION → INSIGHTS:

Which of these information:

- Suggest any chance for your brand?
- Are troubling / threatening?
- Gives you food for thought?

What does this information tell you about your consumers, especially about:

- Their dreams, aspirations and needs?
- Their anxieties and frustrations?

How your brand could:

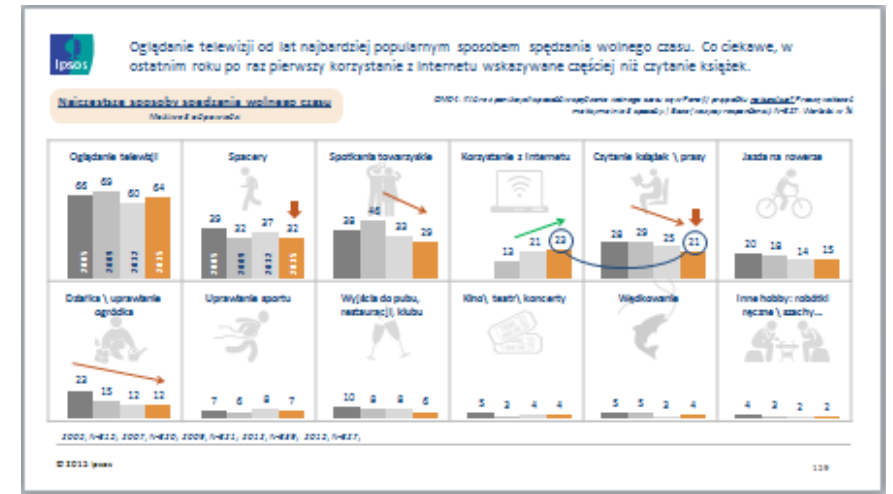
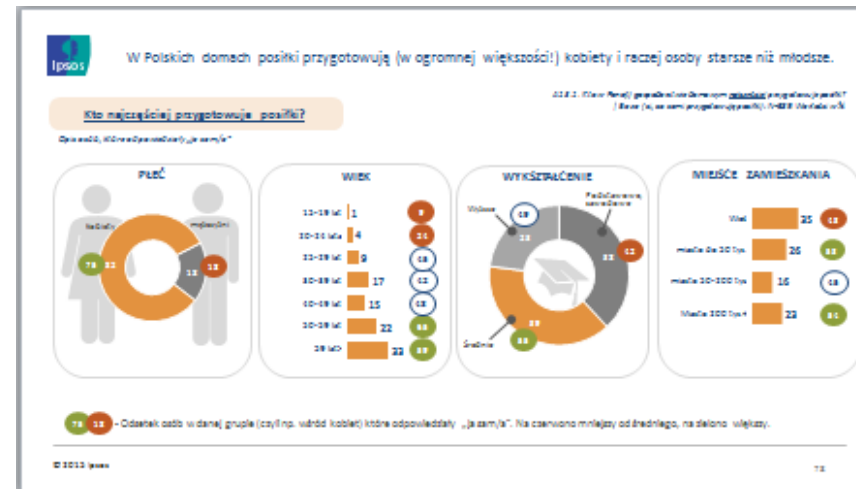
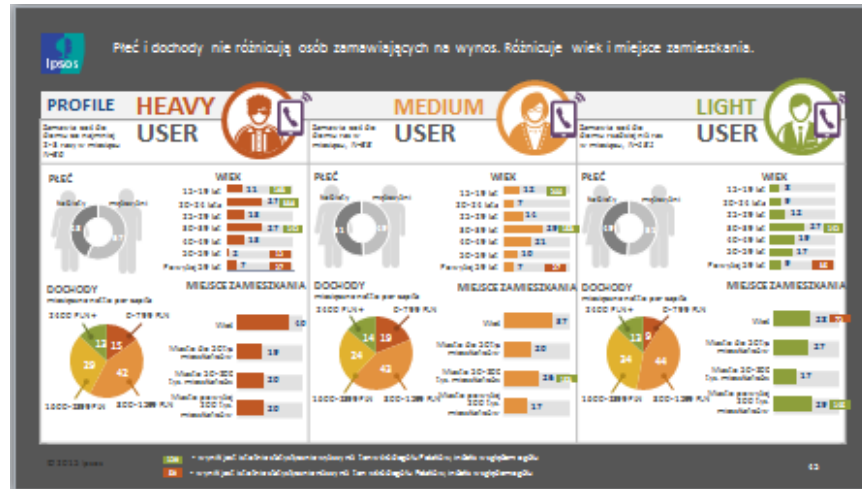
- Fulfill dreams / meet the needs of consumers
- Dissolve their anxieties / relieve frustration

In order to:

- Use market opportunities
- Take advantage of the dangers

**We will work on it together, if you decide to buy a workshop.**

# Information: Examples of how results are presented



## Research areas: **I**nformation collected in the study / areas for **I**nspiration after the study



Nutritional attitudes  
and habits of Poles and  
their children



Usage and assessment of  
various food products  
(and their producers)



Health, well-being  
and physical fitness  
of Poles



Purchase habits related to  
food products in each  
channel and the  
perception of various  
types of stores

This year's report contains results from 2017 as well as comparisons to the results of past surveys. We offer clients two forms of participation in this survey – you can purchase the report with the results or we can additionally organize a workshop based on selected research issues.



# Research areas: **I**nformation & **I**nspiration related to nutritional attitudes and habits of Poles and their children



What are Poles guided by when preparing meals? Are they traditionalists or experimenters in the kitchen? What role do health considerations play? And what do they take into account when preparing meals for their kids? How do Polish children eat? How many of them are fussy eaters?



How many meals do Poles eat, when, where, and with whom do they eat them? How do they perceive different types of meals? What is the role of snacks in their diet?



How often do Poles eat ready-made meals and what is their attitude to them? Do Poles eat out of the home? Where?



# Research areas: **I**nformation & **I**nspiration related to use and assessment of various food products (and their producers)



How often do Poles eat various types of food products? Which do they like best, and which do they perceive to be most healthy ones?



Which food brands do Poles know? Which do they trust?



What do Poles think about healthful food/ organic products? What about light versions of products?



Does the Polish origin of food products make a difference to Polish consumers?





# Research areas: **I**nformation & **I**nspiration related to food products purchase habits



Where do Poles buy food products most often? Have discount stores become the unquestioned leader of all food sales channels? What is the role of e-commerce in food sales?



What do Poles think about the various types of stores (traditional, discount, supermarkets, hypermarkets, online) when it comes to buying food? Do they buy different product categories in different types of stores?



What do Poles think about private labels? Do they treat private labels the same for all product categories? What do they think about private label premium lines?





# Research areas: **I**nformation & **I**nspiration related to health, well-being and physical fitness of Poles



What are Poles main fears and concerns related to health and lifestyle? What are their most frequent health complaints and how do they deal with them?



How do Poles perceive their own weight? Are they trying to lose weight? How?



How do Poles spend their free time? How do they take care of their physical fitness?





# Workshop: **I**nspiration → **I**nights

The purpose of the workshop is to familiarize the client with the research findings & **to stimulate participants to use the new knowledge to come up with new ideas**: new products, communication, consumer activations etc. based on consumer insights.



## 1<sup>st</sup> HALF OF THE DAY

Sharing knowledge and generating platforms

Sharing knowledge – source of inspiration.  
Active listening to participants.



Generating ideas for platforms.  
Techniques that stimulate creativity.



Sharing ideas, grouping & ranking them. Organizing platforms.

## 2<sup>nd</sup> HALF OF THE DAY

Generating and ranking IDEAS FOR INSIGHTS, COMMUNICATION & PRODUCTS.

Work on potential insights within selected platforms

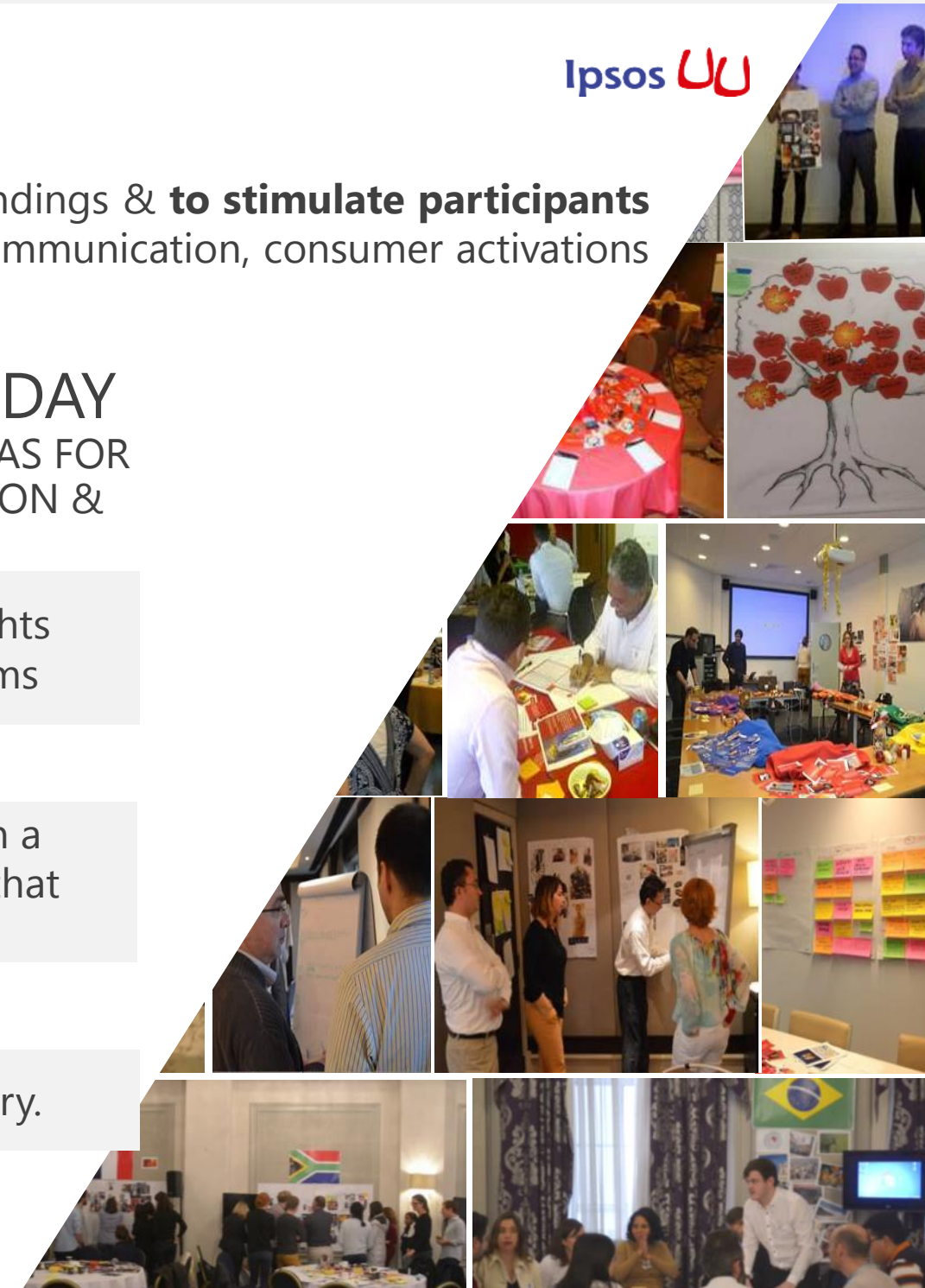


Generating ideas within a platforms – techniques that stimulate creativity



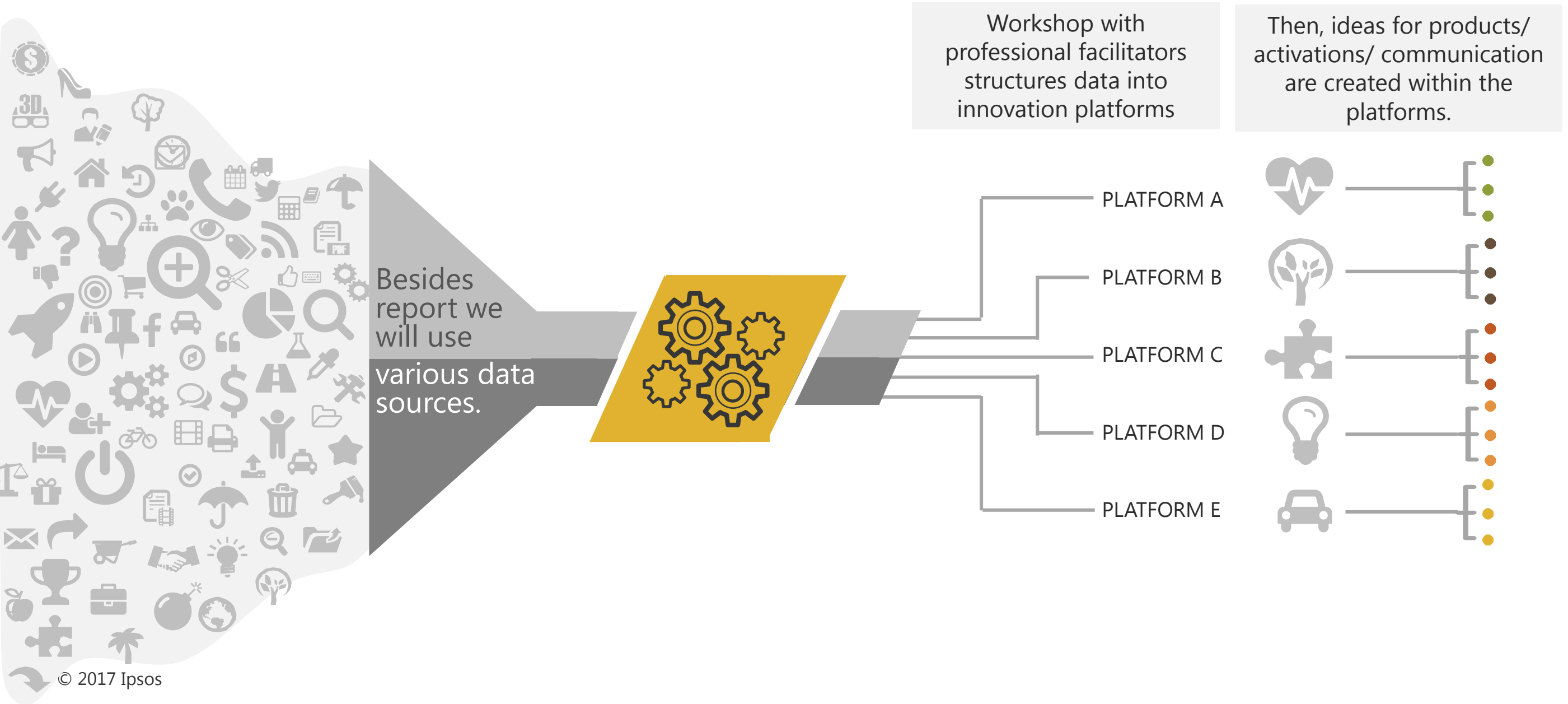
Sharing ideas – summary.

*\* The workshop will be flexibly tailored to meet the client's specific needs*





# Workshop: **I**nspiration → **I**nights





# Workshop: Inspiration → Insights

What are the *innovation platforms*?

PLATFORMS = potential areas of growth, that can serve as inspiration for different directions / concepts / product ideas

What is an *insight*?

INSIGHT = „Consumer insight - the revelation of a significant tension between consumers' aspirations and what they perceive as available, which can be turned into a business opportunity.“

Using platforms is very helpful in the process of innovation:

- Grouping different ideas for products / activations / communication around clearly defined topics / areas
- Emphasizes the main idea (which is what it stems from)
- Expresses it in one, two words, which facilitates the communication of people who later work on innovations





# Workshop: Inspiration → Insights

## Elements of our workshops



### Informality

Stimulating freedom of expression

Go beyond defined business / occupational roles



### Energy

Stimulate creativity and motivation to work at various stages of the workshop



### Exercises that stimulate creative thinking & problem solving

Focus on goal (task) instead of auto-presentation

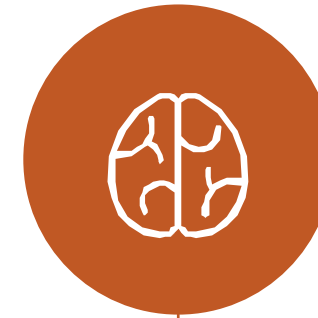
Going beyond schematic patterns



### Elements of workshop work in sub-groups

Engaging in work people who are not natural leaders.

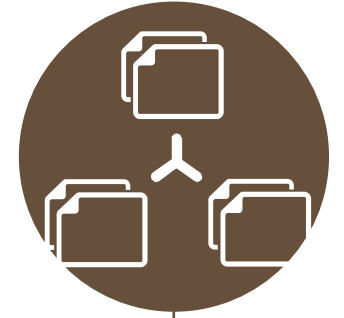
'Regrouping' - using different dynamics of individual participants configurations



### Brainstorming

Minimize the pressure to 'censor' your own ideas

Greater chance to generate a large number of solutions in specific areas



### Post-its

Engaging all participants

Possibility to add more ideas and refer to areas, issues & ordering



# Annex

Methodology, timeline & prices







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**Method:**

The survey will be conducted in respondents' homes with the use of computers (CAPI).



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**Time frame:**

Second half of July 2017.



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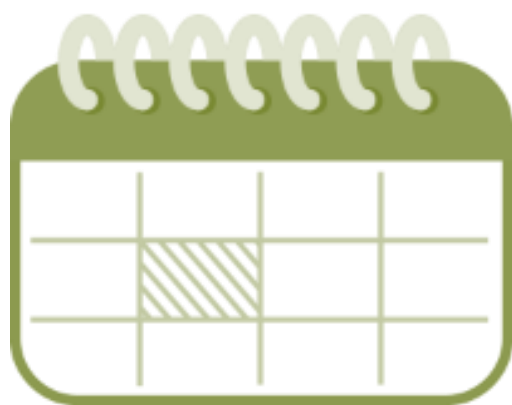
**Sample:**

Nation-wide representative sample (by gender, age, education, region and locality size) of persons 15 years of age or older, N=800

Respondents with children aged 3-14 will be answering to an additional set of questions on children's nutrition – estimated sample size: N=120-130.



# Schedule



Sending the questionnaire to clients	30.06
Submission of additional questions by clients*	7.07
Final confirmation of questionnaire	11.07
Fieldwork	17.07-03.08
Report in Polish	11.09
Report in English	22.09

*\*We encourage you to quick purchase, which guarantee the possibility of adding your own questions to the questionnaire.*

# The team of experts responsible for Food Trends reports



## **Łukasz Borys, Quantitative Team Leader**

Graduated from Nicolaus Copernicus University in Toruń with a degree in marketing; post-graduate studies at the University of Social Sciences and Humanities and the Brand Strategy School at SAR (Marketing Communication Association). Has worked in quantitative research and statistical analysis for over 15 years. Specializes in consumer behavior studies, particularly in the FMCG and services sectors; also innovation and strategic studies supporting targeting and positioning of brands.



## **Tomasz Pańka, Quantitative Team Leader**

Sociologist, graduated from the Brand Strategy School at SAR. Has 18 years' experience conducting quantitative marketing research. Works for clients in numerous sectors, including FMCG and services.



## **Adriana Filaber, Project Manager**

sociologist, graduate in sociology at Warsaw University. Working with Ipsos since 2012. Has wide experience especially in U&A & innovation studies. Specializes in data visualization & preparing infographics.



## SUBSTANTIVE SUPPORT

### **Patrycja Szymańska, Ipsos Qual Head**

Has a post-graduate degree in Group Training and Sociotherapy Studies at the University of Warsaw and a degree in Political Science from the Applied Social Sciences Department at UW.

Has worked in market research since 1999, specializing in qualitative research.

She is a qualified workshop facilitator, both strategic for brands and for innovation.

In the past, she was responsible for supporting the development of qualitative research in Central and Eastern Europe.

Role in the team: consulting methodological assumptions and analysis, cooperation in formulating final conclusions and recommendations, conducting workshops.



### **Mateusz Głowacki, Ipsos Marketing Quant Head**

Psychologist (graduate of the College of Inter-Faculty Individual Studies at the University of Warsaw). 13 years of professional experience, including a year in the customer marketing department (Mars). The years 2007-2010 spent in Prague, conducting research on the Czech market. For 5 years he headed the advertising research department in Ipsos.

He specializes in quantitative research with a particular focus on innovation research and consumer segmentation.

Role in the team: consulting methodological assumptions and analysis, cooperation in formulating final conclusions and recommendations, conducting workshops.



# Annex

## DETAILED LIST OF ISSUES COVERED BY REPORT





# DETAILED LIST OF ISSUES (1/4)

## Nutritional attitudes and habits of Poles



- Nutritional self-assessment
- Attitudes to nutrition and meal preparation
- Knowledge about healthful food, following the principles of healthful nutrition
- Sources of knowledge about nutrition
- Attitudes to children's nutrition
- How much do children eat? How many kids are fussy eaters? What strategies do parents use when feeding their kids?
- Number and types of meals eaten, time and place where each type of meal and snack is eaten (adults and children separately)
- **NEW!** Reconstruction of last dinners – what is eaten, who prepares it, in what way?
- What is most often eaten and drunk at each meal.
- What are the most popular snacks?
- Which meals are most often skipped and why?
- Emotional and functional needs connected to each type of meal and snacks
- Who prepares particular meals in the household, and how?





# DETAILED LIST OF ISSUES (2/4)

## Usage and assessment of various food products (and their producers)



- Consumption frequency of selected food products
- Which products are liked the most, which are perceived to be the most healthful?
- Usage frequency of ready-made dishes and side-dishes at home vs. frequency of preparing meals from scratch using basic ingredients
- Assessment of ready-made dishes and side-dishes used at home, attitude toward ready-made products
- Food eaten out of home and ordered for home delivery (drivers, frequency, places, expenditures)
- Eating at work/ school (type of meal, frequency, expenditures)
- Use and attitude to eco, light and domestic food products
- **NEW!** Usage and attitudes towards products without gluten / lactose
- **NEW!** Frequency and occasions of various alcoholic beverages consumption
- Awareness of food brands and producers
- Trust in food brands and producers



# DETAILED LIST OF ISSUES (3/4)

## Health, well-being and physical fitness of Poles



- Health and fitness self-perception
- Perception of children's health and weight
- Fears and concerns related to various illnesses
- Poles' health complaints and ways of dealing with their health problems
- Self-perception of weight and associated fears and concerns
- Maintaining and losing weight, planned changes in weight
- Diets and weight-loss methods
- Usage of dietary supplements, painkillers, cigarettes and alcohol
- Ways of spending free time
- Sports trained





# DETAILED LIST OF ISSUES (4/4)

## Purchase habits



- Places of food purchase (divided by food categories) vs. places where the most important non-food categories are bought
- Drivers of shopping in various types of stores
- Image of each type of store (high quality, low prices, good service, convenience etc.)
- Food product purchase drivers
- Assessment of private labels





# THANK YOU!

## WE INVITE YOU TO CONTACT US!

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