TRENDS IN THE NUTRITION HABITS OF POLES 2023

Syndicated study

GAME CHANGERS

Ipsos

WE CARRIED OUT THE LAST WAVE OF THE STUDY RIGHT AFTER THE PANDEMIC WITH THE HOPE THAT THE WORLD WE LIVE IN, WOULD GET BACK ON TRACK. IT DIDN'T HAPPEN AND THE REALITY SEEMS TO BE EVEN MORE COMPLICATED.

> *Our eating habits have never been particularly open to rapid changes. Changes, if any, were evolutionary rather than revolutionary and depended on developments in the broader context. The reality in which we live today has changed radically (pandemic, Russian aggression against Ukraine, inflation, climate crisis…). Instead of guessing, we will examine for you whether and how this has affected the attitudes and eating behavior of Polish people.*

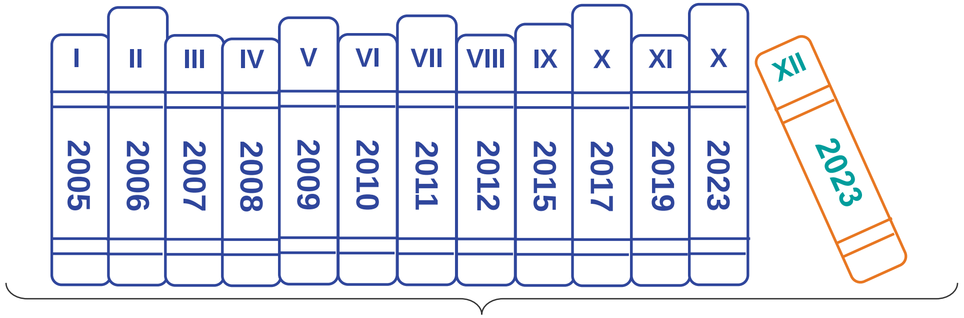
Anna Karczmarczuk, CEO of Ipsos

DO WE EAT DIFFERENTLY TODAY THAN WE DID BACK IN 2021? OR PERHAPS JUST DIFFERENT THAN 16 YEARS AGO WITHOUT MAJOR CHANGES IN THE LAST TWO YEARS? OR MAYBE THERE ARE CONSTANT HABITS THAT HAVE NOT CHANGED AT ALL?
WE WILL EXPLORE IT IN THE LATEST EDITION OF THE FOOD TRENDS SURVEY.

FOOD TRENDS – A FEW WORDS ABOUT THE STUDY

FOOD TRENDS ARE…

- **a quantitative syndicated report** from Ipsos,
- **the largest compendium of knowledge** about the nutritional habits of Poles and their attitudes towards food, cooking, product categories and health,
- huge amount of data (over 300 slides) in a **beautiful and easy to assimilate form, with a brief summary of key findings**
- **it is also a promise of inspiring and effective workshops** helping you in incorporating this knowledge to your marketing strategy.
- **We track trends in Poles' nutrition for 19 years now.**



In each new wave of the study, in the annex, you will find data from ALL other waves

METHODOLOGY

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

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

When?
Interviews will be conducted in second half of July 2023 (similarly as in previous waves of the research).

Report in Polish – September 2023
Report in English – October 2023

MAIN MENU

Permanent thematic blocks Food Trends, in which we will compare the results to the previous measurements.

THE WORLD OF MEALS
In what circumstances do we eat?

Main meals
Which meals do we eat regularly? When, with whom, where?
Snacks
What do we eat and what is their role? Are they healthy? What are our attitudes towards snacks?
Meals outside home
Home delivery/ take-out, eating in town, eating at work: how often, how much does it cost, where do we eat?

THE WORLD OF MOTIVES
What determines how we eat?

Attitudes towards cooking
Traditionalism vs experimenting in the kitchen, attitude towards ready-made dishes vs made from scratch. Frequency of cooking. Do we like cooking?
Healthy nutrition
Do we eat healthfully? What does this mean to us? Gluten-free, lactose-free, light, bio/ eco (organic) products. Vegetarianism.

THE WORLD OF PRODUCTS
What do we eat and how often?

Products – over 100 product categories
How often do we eat particular product categories? Penetration, frequency, profile of users.
Perception of taste and healthfulness of products
Which categories of products are the most liked and which are perceived as the healthiest?

THE WORLD OF SHOPPING
Where do we shop and why?

Shopping habits
Where do we shop and how often? What products do we buy in given types of stores?
Do we read labels?
What is the role of e-commerce in the purchase of food products?

THE WORLD OF HEALTH
How do we care for health and fitness?

Well-being, weight, health
How do Poles feel, how much do they weigh? Are they trying to slim down and how?
Do they play sports?
What are they worried about?
What makes it difficult for them to eat healthy? Do they expect help in this regard?

WORLD OF PACKAGING
How important is ecology?

Ecology
How do we care for the environment?
Packaging
How important for Poles is that the packaging does not harm the environment?

This block was supposed to appear only in the previous wave, but it turned out to be so interesting for customers that we decided to keep it.

SEASONAL MENU

To make sure that Food Trends catches also the latest trends, we insert one replaceable block in each wave. This year we are adding this new section:

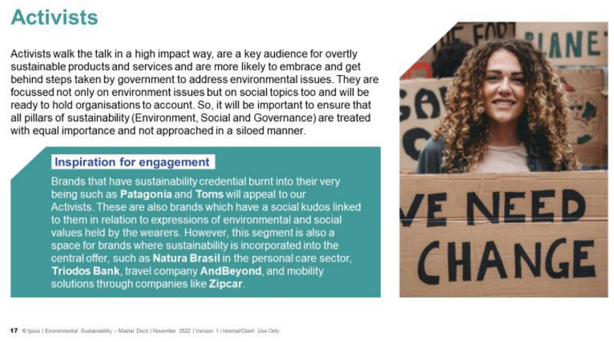
Environmental Sustainability Segmentation

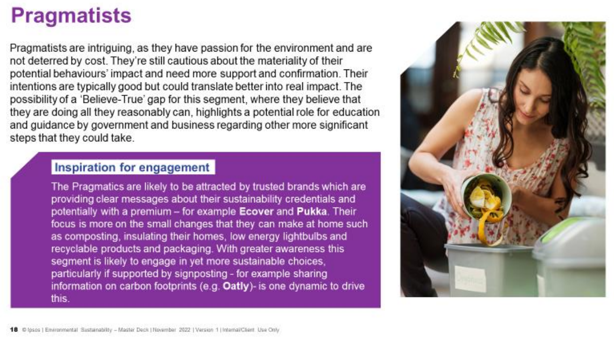
People link food with health, health with the environment and that with sustainability. Environmental Sustainability Segmentation is a global project conducted by Ipsos in 15 countries, in which we segment people by their level of concern about environmental change and their personal commitment to protecting it. By including this segmentation in the Food Trends survey, you will gain:

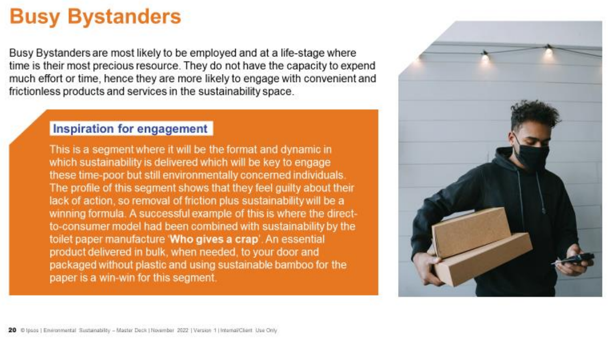
1. Information on how numerous they are in Poland:

- **Activists** – a key target for sustainable brands
- **Pragmatics** – who are willing to buy sustainable products at reasonable prices when the purchase is hassle-free
- **Conflicted Contributors** – who, looking mainly at the price, would like someone else to take care of the environment
- **Busy Bystanders** – focused on work and family, ready to engage in initiatives only just „by the way"
- **Disengaged Denialists** – for whom the environmental crisis is exaggerated/ does not exist.

2. You will be able to check the size of these segments among users of your product categories.







3. You will also gain a comparison of Poland to other countries

More information: https://www.ipsos.com/en-ca/knowledge/consumer-shopper/segmentation

ADDITIVES

In order to better understand what changes have taken place on Polish tables, in research we extend the following threads:

FOOD SHARING AND WASTING

- Poles' attitudes and behaviours related to wasting and sharing food

INFLATION PATENTS

- Ways to cope with rising food prices

AI COOKS

- Using AI to search for recipes

…AND…

- Deepening the the knowledge of smart shopping (coupons, apps, loyalty programs)
- Attitudes toward self-service checkouts
- Attitudes toward the planned ban on the sale of energy drinks to minors

DON'T MISS THE CHANCE TO ADD YOUR OWN EXCLUSIVE QUESTIONS!

- Until 19.06 you have the opportunity to add your own questions, on issues that interest you, the results of which we will include only in your version of the report. You can find the cost of additional questions on slide 12.

WHAT (WILL BE) IN THE REPORT AND WHAT (TO DO) WITH IT?

INFORMATION, INSPIRATION → INSIGHTS

INFORMATION:

- How did the pandemic, war and inflation affected the category of your product and the motivations and needs of customers on which you base your positioning? What has changed and requires a response, and what has remained the same?
- Who are the consumers of your category: are they really only women aged 24-45, living in big cities?
- Are you considering positioning of 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 does „healthy" really mean?
- 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:

- How have these last two years changed their diet and expectations towards food?
- In what aspects have they not changed at all?

How your brand could:

- Fulfill dreams / meet consumers needs and dispel their anxieties
- Enter into the "new normality"

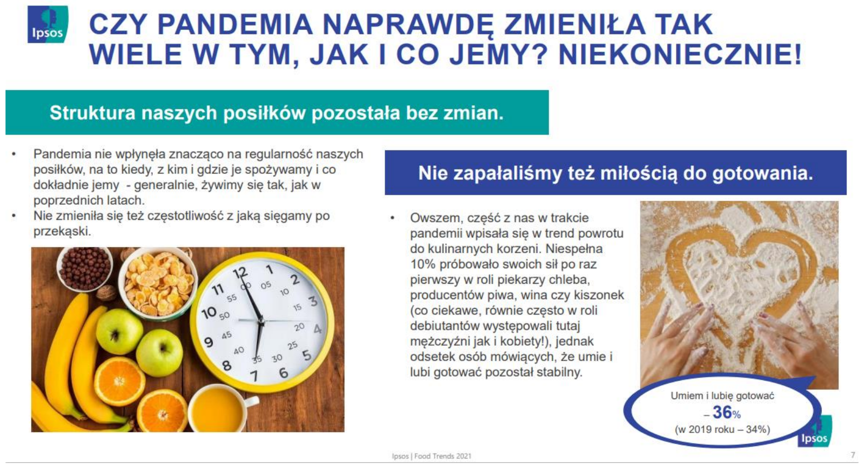
In order to prepare a new communication, brief for R&D or consumer activation and:

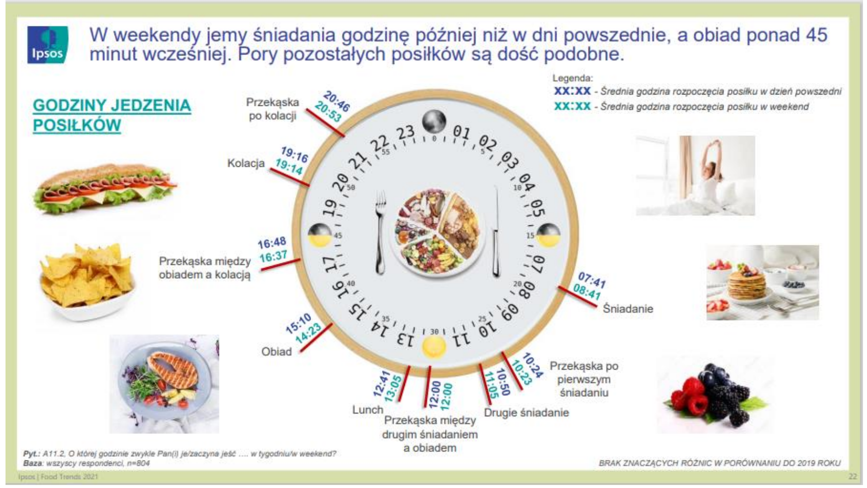
- Use market opportunities
- Take advantage of the dangers

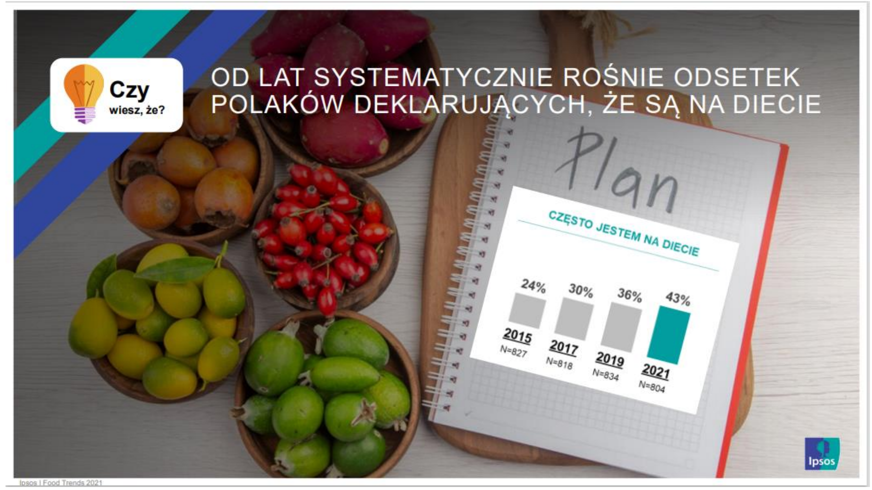
We'll work on it together on the workshops.

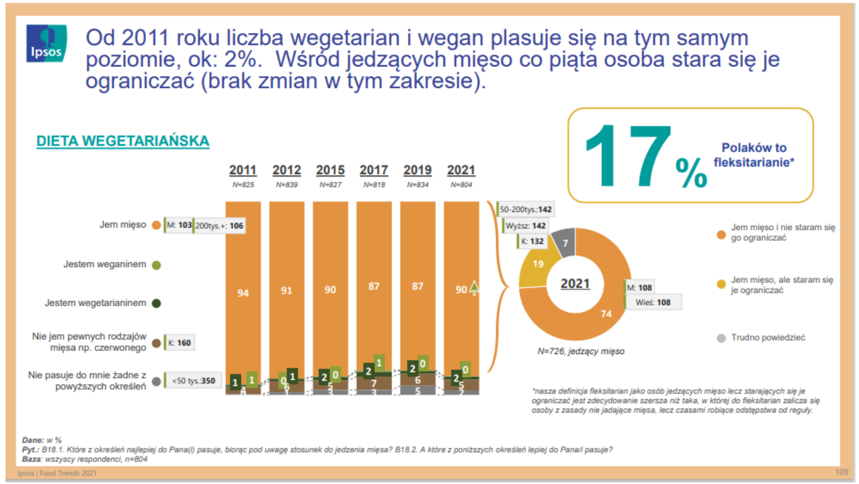
INFORMATION: HOW DO WE PRESENT RESULTS?

EXAMPLES FROM THE 2021 REPORT









INSPIRATION ➡ INSIGHTS, WORKSHOP

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

I HALF OF THE DAY

Dzielenie się wiedzą i generowanie
PLATFORM

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

⬇

Generating ideas for platforms / areas / topics. Techniques that stimulate creativity.

⬇

Sharing ideas, grouping & ranking them. Organizing platforms.

II HALF OF THE DAY

Generating and ranking IDEAS FOR
INSIGHTS, COMMUNICATION & PRODUCTS

Work on potential insights within selected platforms

⬇

Generating product ideas, communication or activation within platforms - techniques that stimulate creativity.

⬇

Sharing ideas – summary.

The workshop will be flexibly tailored to meet the client's specific needs, its categories and brands

INSPIRATION ➡ INSIGHTS, WORKSHOP

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

INSPIRATION → INSIGHTS, WORKSHOP

The workshops can be conducted online or offline. Our extensive experience in both environments allows us to make a promise of comparable end results. We work in the same way, using techniques that stimulate creativity, interweaving individual and group exercises. We promise the same result.

Offline / face to face workshop

A traditional workshop in a stimulating space, usually lasting a full working day, i.e. 8 hours. Divided into 2 sessions divided by lunch.

Online workshop

Online workshop conducted in Teams or Zoom; lasting 2 times 4 hours (i.e. meetings for 2 days in a row), with time for reflection of participants between days / sessions.

NUMBER OF PARTICIPANTS

max. 24

MURAL

Mentimeter

INVESTMENT (PLN NET)

REPORT I WORKSHOP

Report in Power Point, in Polish and English along with the **presentation** of results in Warsaw or remotely.

24 000 PLN

Full bundle: report, presentation + creative workshop focused on generating insights (assuming the implementation of the workshop in Warsaw, organization of the hall and catering provided by the client)

38 000 PLN

For buyers of previous edition - **10% discount**

WANT TO ADD YOUR OWN QUESTIONS?

The results of individual questions will be presented in a separate report along with additional analyzes of other issues by these questions (detailed scope to be determined)

Closed question, one answer	1 500 PLN
Closed question, many answers	2 100 PLN
Open question	2 200 PLN

Time to add your own questions – **until June 19**

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Team role: cooperation in formulating final conclusions and recommendations, conducting workshops.

BE SURE. ACT SMARTER.

GAME CHANGERS

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