

TRENDS IN POLES' NUTRITIONAL FACTS

Proposal 2019

Syndicated study

GAME CHANGERS



TRENDS IN POLES' NUTRITIONAL HABITS

The Food Trends

Offer • • 2019

Ipsos

INTRODUCTION

Food Trends, a quantitative syndicated report from Ipsos, is **the largest compendium of knowledge** about the nutritional habits of Poles and their attitudes towards food, cooking, product categories and health.

We track trends in Poles' nutrition for **14 years now.**

I	II	III	IV	V	VI	VII	VIII	IX	X	XI
2005	2006	2007	2008	2009	2010	2011	2012	2015	2017	2019

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

It's an inspiring encyclopedia of knowledge, in a beautiful and easy to assimilate form - despite the fact that it contains 325 slides 😊

It is also a promise of **inspiring and effective workshops** that shows you how to use this knowledge in your marketing strategy.

Methodology



Method:
The survey would be conducted in respondents' homes with the use of computers (CAPI). This year we used also video analytics in open questions about food packagings.



Sample:
N=834
Nation-wide representative sample (by gender, age, education, region and locality size) of persons 15 years of age or older. Respondents with children aged 3-14 will be answering an additional set of questions on children's nutrition.



Fieldwork:
Interviews were conducted in second half of July 2019 (similarly as in previous waves of the research).



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STUDY SCOPE



THE WORLD OF MEALS: In what circumstances do we eat?

Main meals

Which meals do we eat regularly? When, with whom, where? What do they consist of?

Snacks

What snacks do we eat? 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 drives our everyday nutritional choices?

Attitudes towards cooking

Traditionalism vs experimenting in the kitchen, attitude towards Polish vs. foreign cuisine, towards ready-made dishes vs made from scratch, searching for inspiration in the kitchen. Frequency of cooking. Motives of cooking.

Healthy nutrition

Attitudes towards healthy nutrition. Do we eat healthfully? What does this mean to us? Gluten-free, lactose-free, light, bio/ eco (organic) products. How many vegetarians or flexitarians are in Poland? Why don't they eat meat?

Children's nutrition

What strategies do parents use when feeding their children? How do children eat, how many of them are fussy eaters and how many are overweight?



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?

Brands and producers of food products

Which brands of food products do we know? Which ones do we trust? What is the attitude towards private labels?



THE WORLD OF HEALTH: How do we take care of ourselves?

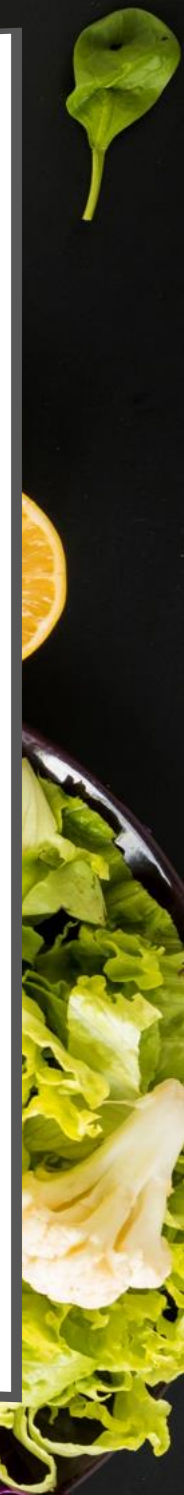
Well-being, weight, health

How do Poles feel, how much do they weigh, are they trying to slim down? Do they play sports? What are they worried about? What are the ailments and how are they dealing with them?



Annex

In the annex you will find trends, full distribution of answers and user profiles of all product categories.



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SEASONAL MENU

In order to refresh the Food Trends formula, we insert one replaceable block in each wave.

2012 Segmentation of the needs behind the main meals based on the Censydiam model.

2015 Mobile ethnography: 1) **Grill** and 2) everyday **snacking**.

2017 Reconstruction of the **last dinners**.

2019 The module about **packaging** and **ecological attitudes**.

Why do we ask for packagings in 2019?

Packaging is not only noticeability on the shelf, quality and convenience of the product usage. The 'third moment of truth' is also increasingly important - understood as the impact of packaging on the environment.

Question - is it also important for the Polish consumers?

We provide knowledge about:

- How many Poles pay attention to the **impact of packaging on environment** - both on the level of attitudes and specific behaviors
- **Who** is especially sensitive to the ecological dimension of the packaging?
- Do people spontaneously think about ecology when they evaluate the product's packaging? Module with usage of **video analysis** (!)

Additionally, in the current wave we are expanding the following threads:

- Frequency of visiting **food trucks**
- What do we eat at work and how often? Where do we buy food for work? How much money does it cost?
- Knowledge and use of online portals providing food from various restaurants
- Using **diet catering** (box diet)
- What do people mean by **ecologic, organic and bio** food?
- Strategies of **cutting sugar from the diet**
- Reasons of not eating / limiting meat**, attitudes towards meatless meals
- Foreign cuisines** eaten in bars/restaurants
- What **ingredients** in the products are the most **discouraging to buy**? (e.g., glutamate, sugar, etc.)





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 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 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 consumers needs
- Dissolve their anxieties / relieve frustration

In order to:

- Use market opportunities
- Take advantage of the dangers

We'll work on it together on the workshops.



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.



1st 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.

2nd 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

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



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INVESTMENT

Prices in PLN net.



..... 16 000 PLN

The price of the report in PowerPoint, in Polish and English. The price includes a presentation of results and short movie about packagings.



..... 25 000 PLN

The price of bundle: **report, presentation + creative workshop** focused on generating insights (assuming the workshop is conducted in Warsaw and the client provides/ covers the cost of the place where it's being hold).

10% discount
for buyers of previous edition.

A team of experts responsible for Food Trends reports

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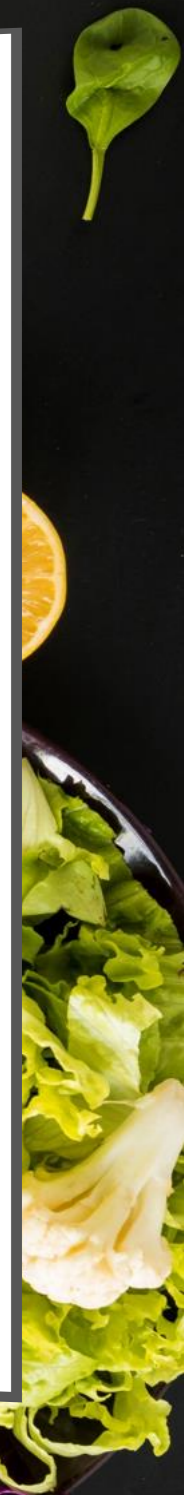


Economic psychologist, PhD, graduated from University of Warsaw. From 12 years bounded with market research and quantitative studies. Specialized in consumer researches, particularly in FMCG.

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You are welcome to contact us!



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