

TRENDS IN THE NUTRITION HABITS OF POLES 2023

Syndicated study

GAME CHANGERS



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.

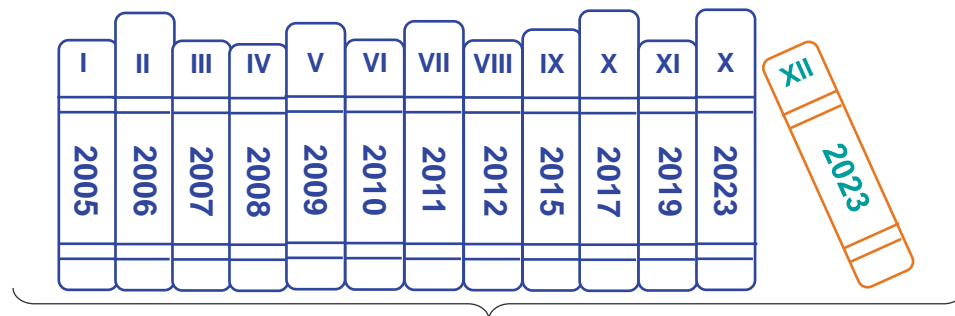
Anna Karczmarczuk, CEO of Ipsos

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.

Activists

Activists walk the talk in a high impact way, are a key audience for overtly sustainable products and services and are more likely to embrace and get behind steps taken by government to address environmental issues. They are focused not only on environment issues but on social topics too and will be ready to hold organisations to account. So, it will be important to ensure that all pillars of sustainability (Environment, Social and Governance) are treated with equal importance and not approached in a siloed manner.

Inspiration for engagement

Brands that have sustainability credentials burnt into their very being such as Patagonia and Toms will appeal to our Activists. These are also brands which have a social kudos linked to them in relation to expressions of environmental and social values held by the wearers. However, this segment is also a space for brands where sustainability is incorporated into the central offer, such as Natura Brasil in the personal care sector, Triodos Bank, travel company AndBeyond, and mobility solutions through companies like Zipcar.



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Pragmatics

Pragmatists are intriguing, as they have passion for the environment and are not deterred by cost. They're still cautious about the materiality of their potential behaviours' impact and need more support and confirmation. Their intentions are typically good but could translate better into real impact. The possibility of a 'Believe-True' gap for this segment, where they believe that they are doing all they reasonably can, highlights a potential role for education and guidance by government and business regarding other more significant steps that they could take.

Inspiration for engagement

The Pragmatics are likely to be attracted by trusted brands which are providing clear messages about their sustainability credentials and potentially with a premium – for example Ecoover and Pukka. Their focus is more on the small changes that they can make at home such as composting, insulating their homes, low energy lightbulbs and recyclable products and packaging. With greater awareness this segment is likely to engage in yet more sustainable choices, particularly if supported by signposting – for example sharing information on carbon footprints (e.g. Oatly) – is one dynamic to drive this.



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Conflicted Contributors

For a Conflicted Contributor, remember "price prevails." Sustainability benefits will lose all relevance if they are linked to a higher price. This segment is effectively lost at 'pay' and they will very much be looking for sustainability to be delivered as a co-benefit rather than the sole benefit. But their level of concern and engagement do suggest that all things being equal they will make the sustainable choice.

Inspiration for engagement

Allbirds is a New Zealand-American company that produce footwear with strong ethical and environmental foundations. Allbirds Wool Runner (retailed for \$99) developed a bit of a cult following, with the brand bringing some social kudos around being seen to be Green. But then Amazon entered the space with a copy for just \$45, driving huge sales. Allbirds not with eco-credentials, but if people can look like they are doing the right thing and get this at a lower price, then the choice to lower cost can be an easy one.



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Busy Bystanders

Busy Bystanders are most likely to be employed and at a life-stage where time is their most precious resource. They do not have the capacity to expend much effort or time, hence they are more likely to engage with convenient and frictionless products and services in the sustainability space.

Inspiration for engagement

This is a segment where it will be the format and dynamic in which sustainability is delivered which will be key to engage these time-poor but still environmentally concerned individuals. The profile of this segment shows that they feel guilty about their lack of action, so removal of friction plus sustainability will be a winning formula. A successful example of this is where the direct-to-consumer model had been combined with sustainability by the toilet paper manufacturer Who gives a crap. An essential product delivered in bulk, when needed, to your door and packaged without plastic and using sustainable bamboo for the paper is a win-win for this segment.



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

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



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

CZY PANDEMIA NAPRAWDĘ ZMIENIŁA TAK WIELE W TYM, JAK I CO JEMY? NIEKONIECZNIE!

Struktura naszych posiłków pozostała bez zmian.

- Pandemia nie wpłynęła znacząco na regularność naszych posiłków, na to kiedy, z kim i gdzie je spożywamy i co dokładnie jemy - generalnie, żyjemy się tak, jak w poprzednich latach.
- Nie zmieniła się też częstotliwość z jaką sięgamy po przekąski.



Nie zapalaliśmy też miłością do gotowania.

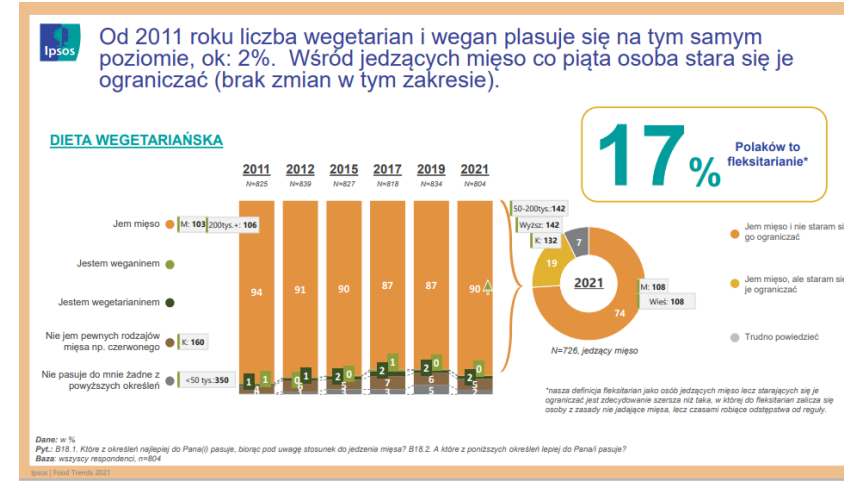
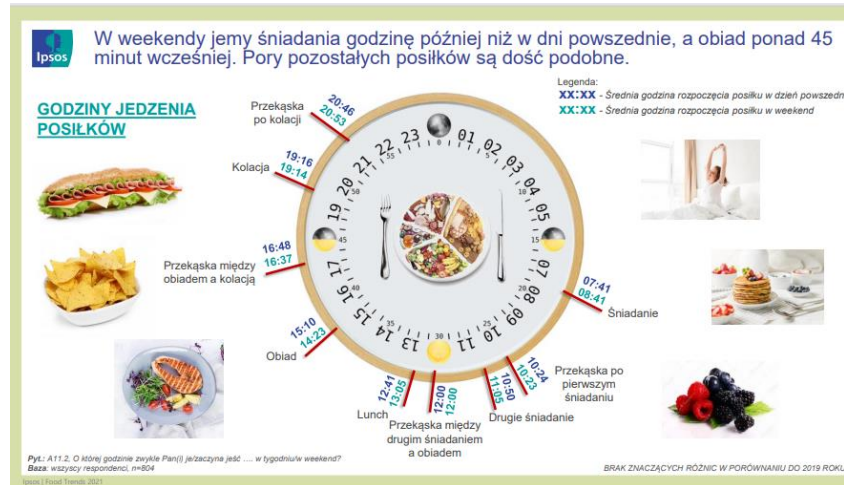
- Owszem, część z nas w trakcie pandemii wpisała się w trend powrotu do kulinarnych korzeni. Niespełna 10% próbowało swoich sił po raz pierwszy w roli piekarzy chleba, producentów piwa, wina czy kiszonek (co ciekawe, równie często w roli debiutantów występowali tutaj mężczyźni jak i kobiety!), jednak odsetek osób mówiących, że umie i lubi gotować pozostał stabilny.



Umiem i lubię gotować
-36%
(w 2019 roku - 34%)

Ipsos | Food Trends 2021

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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.



NUMBER OF PARTICIPANTS

max. 24

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.



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**

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**BE
SURE.
ACT
SMARTER.**

GAME CHANGERS

