HEALTHY EATING RESEARCH

AN ONLINE COMMUNITY RESEARCH PROJECT

GLOBAL REPORT

July 2017

Software provider:

Agenda

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5 Healthy and Unhealthy Foods

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8 Responsibilities and Goals in Healthy Living

Introduction and Research Methodology

Research Background and Goals

Research background

As health, lifestyle and food are all hot topics today, it is important to understand people's opinion and practical knowledge of these topics.

We wanted to create significant value for clients, enabling them to gain a better understanding of a lifestyle focusing on healthy eating.

Here, we present a simple, clear and (we believe) remarkable cross-country comparison, showing the key results of the research from nine markets on the topic of healthy eating.

Research goals

The objective of the research was to better understand the topic of eating habits and attitudes towards healthy food.

- The framework for healthy eating and nutrition
- Potential product gaps (nutritional food / nutritional supplements) and opportunities for product variants– where there is a clear demand across multiple markets
- The differences between men and women in terms of habits and attitudes
- The differences between families with younger and older children
- The differences between countries and markets

This report presents a summary of findings from qualitative research on Healthy Eating in **Brazil, Croatia, Germany, Greece, Hungary, Poland, Russia, Turkey and the UK**

The study was carried out in March 2017, covering key issues from a consumer perspective.

Research Methodology

Methodology

Online bulletin-board conversations with 20 participants

- For the 5 days of the research, daily topics were selected. In some markets participants filled out questionnaires as well as contributing to the debate
- Participants were screened and recruited by phone and asked to contribute anonymously
- All participants were sent a “how to” document for the online system and were supported by moderators in each market

Target group

- Age: 25-45 years old
- Mix of gender and even mix of families with younger (under 5) and older children (ages 5-18)
- ABC1 social grades
- Must agree that healthy eating is a priority in their life, and there are no major health issues currently

Topics

1. Healthy life and lifestyle
2. Healthy and unhealthy food and drink
3. Bio, organic, functional food and dietary supplements
4. Shopping and places
5. Responsibilities and goals in healthy life and children’s healthy life

Symbols used:

Results of online bulletin-board conversation

Data from questionnaire

Key Findings

Key Findings at a 'Global' level 2/1

Good health is all about **balance** and mental health is a key component of this. Trying to eat healthily all the time (without snacks or treats, particularly in social occasions) is actually counter productive and unrealistic.

Hydration seen as critically important to good health.

In all the countries that took part in this research, **participants are turning away from the convenience of processed foods and prepared meals** and recognising that home cooked food using fresh ingredients is better for them and their families.

In most markets, there is also a **move away from artificial sweeteners** back to healthier, more natural sugars (although some struggle with diet drinks / sodas in this regard). Also, there is a general move **away from margarine and back to butter** as a healthier choice.

Key Findings at a 'Global' level 2/2

Perceptions of **foreign cuisines** (particularly Chinese and Italian) are based on perceptions of **how participants see these presented locally**. For example, where Italian is thought of as pasta, cheese and pizza it is considered unhealthy; where Italian is linked with the Mediterranean diet of fruit, vegetables and light oils it is considered healthy.

Few differences are perceived between the terms Bio and Organic and the term, **'Functional Food' has little or no currency / meaning**. Organic is the more widely understood term, taken broadly to mean free of chemicals and fertilisers.

When functional food is explained, participants are fine with highlighting health giving properties of foods which occur naturally, but are **suspicious about foods which are 'engineered'** to provide health benefits: this appears unnatural.

Overall, participants were **willing to pay marginally** (but not substantially) **more** for healthier foods (including bio / organic products), but have **concerns around paying for what's on the label** rather than a higher quality product with more nutritional benefits.

Key Findings: Healthy life and lifestyle

A healthy lifestyle means broadly similar things across all markets. Lots of areas where **balance** seen as key:

- Balance between **physical and mental health** (particularly Russia, Hungary)
- Balance between **diet and exercise** (Germany, UK)

In all markets, **alcohol and tobacco were cited as unhealthy**, but only in Turkey were these specifically raised as barriers to a healthy lifestyle.

Physical health derives from **sufficient sleep, exercise and a diet that is both varied and balanced**. As well as tangible benefits, it's also associated with a 'natural glow'.

Mental health also associated with diet, but also with **stress reduction** (particularly Germany, UK, Hungary and Russia) and **good relationships / community** (particularly Poland).

The biggest challenges are **time** (for shopping, cooking and researching what to buy/prepare), **money** (the additional cost of quality, fresh ingredients) and the **temptation of other options** (fast foods, convenience foods) which can ruin all of the hard work.

Key Findings: Healthy and unhealthy

Healthy eating equates to **reducing and avoiding refined sugar, white flour and fats** – in favour of a balanced diet which includes all the main food groups alongside adequate hydration.

The main motivations are **maintaining family health and avoidance of disease.**

Features a diet including **natural ingredients in unprocessed form** that are as far as possible **free from chemicals, additives, preservatives and pesticides.**

Most feel there is no difference between a ‘healthy’ diet and one specifically aimed at weight loss.

Unhealthy eating felt to be **acceptable in moderation** or for special occasions – indeed in some cultures (Turkey, Greece, Hungary) it’s seen as unavoidable in some social situations. Being in a hurry / lack of time and convenience also seen as drivers of occasional lapses into eating fast food. And, in some cultures (Poland, Hungary) consumers admitted that taste was a factor in luring them.

Key Findings: Bio and Organic

Generally, consumers find it **hard to differentiate between Bio and Organic** products and in some markets (UK, Russia, Turkey, Hungary) the term, 'Bio', in isolation has no or little meaning.

Organic is the more widely understood term - taken broadly to mean:

- Free of chemicals and fertilisers
- Better 'quality' (although unsure of specifics) – but certainly more expensive

Purchase drivers cited variously as:

- For specific groups (small children, pregnant women, people with allergies or intolerance, people with existing health conditions)
- Discounting (e.g. if same as / lower than standard product)
- Consumers in Germany and UK also cited non-specific emotional benefits: feeling healthy / well

Barriers are:

- Expense
- Lack of trust – in authenticity (generally) in certification (Germany and Hungary particularly) and in some instances (Greece) the farming industry / farming inspection processes
- Reliability / standardisation of product (particularly Croatia)

Key Findings: Functional Foods

The vast majority in all markets were **unaware of the term ‘Functional Foods’**, and when it was described to them some were against the idea:

- Associated with probiotics and weight loss pills (Turkey)
- Adding vitamins and minerals for sports users / athletes (Poland)
- Food which tastes better / makes you feel better (Germany)
- Messing with nature / unhealthy (particularly Russia, but mentions of this in most markets)
- Food producers seen as prioritising higher sales over genuine differentiation

Wide country variation with regards to functional foods consumed

- Dairy products / probiotics (Turkey, Russia)
- Fortified cereals / wholegrain (UK, Russia, Hungary, Poland)
- Fortified juices (Germany, UK)

Low claimed usage of dietary supplements in all markets, although somewhat higher consumption of minerals, particularly in winter for North Eastern European countries.

- **In most markets, single vitamins (mainly C and D) are preferred to multivitamins**, although Russia is a notable exception to this
- Other supplements taken include Greek herbs (Greece), herbal teas (Turkey), slimming supplements (Poland), magnesium (Croatia) and calcium (Germany)

Key Findings: Shopping and Places

Consumers in Germany, Greece, Russia and UK rely heavily on supermarkets for their main shopping, including for organic products. However in common with other nations some use **local** butchers, fishmongers bakers and grocers for **higher quality produce.** In Hungary the purchase of organic/bio products is not closely related to particular places of shopping.

In Croatia, consumers are more selective and prefer to buy organic in specialist shops and food markets, whereas in Hungary participants tend not to go to particular shops for healthier foods.

In general, **healthier food is associated with higher cost** (in Poland, organic foods are reckoned to be three or four times more expensive), but also **better quality.**

They are **prepared to pay more** for better quality food compared to regular brands – but **not excessively more.**

Particularly when buying new brands or foods, they always check the label looking for freshness, additives and preservatives, calorie content, low sugar messages, price and expiry date. In Poland, Turkey and Hungary mention was made of checking for possible food allergies and intolerances.

Key Findings: Responsibilities and goals

Adult obesity is felt to be the **responsibility of the individual** and of parents

The remedy was felt to be to cut down on fats and white sugars (generally), also white flour (Poland, Hungary) and to avoid fast food.

Parents have **different strategies to encourage children** to eat healthily. In some countries (UK, Croatia, Hungary) it’s a **temptation and trickery** based approach (hiding vegetables in meals). Others (Russia in particular) adopt a more **disciplinarian approach.**

Only in Greece and Russia are **low calorie sweeteners** regarded as acceptable. In other countries these are regarded as **unhealthy and chemical** or else there are mixed views. Natural alternatives such as stevia and xylitol were mentioned by a few respondents in all markets. In Hungary opinions vary and tend towards extremes.

Internet and people (friends and family) are **big influencers**. Online, it’s key that information is **anchored to trusted sources** (experts, professionals).

Opinion leaders include nutritionists and chefs, coaches / athletes / lifestyle coaches, doctors (particularly those on TV) and authors.

Healthy Life and Lifestyle

Good health is all about balance

*"I believe that good health means to **take care of your body and mind and to keep a good balance in your life** and routine (Joana, 31, Brazil)*

Physical health

- Fruit and Veg based diet
- Avoidance of foods high in fat, sugar and salt
- Lean meat and fish
- Unprocessed foods / home cooking

Mental Health

- Exercise
- Stress management / Relaxation / yoga etc.
- Fresh air
- Good sleep

Croatia **Poland** **Brazil**

More of a focus on family and other relationships as promoters of good mental health. Croatians feel that 'being satisfied / happy with your life' is also a key ingredient of this

Germany

German participants mentioned the importance of living in a 'good atmosphere' and the avoidance of 'bad thoughts'

Turkey

Turkey was the only country where cutting down on alcohol and tobacco products was specifically mentioned under physical health.

Secrets of good health included: ***Setting time aside to be healthy (UK), Taking control of my life and my personal condition (Russia), Everything in moderation (Croatia) Pay attention to myself (Greece, Hungary)***

Feeling Good and Feeling Bad

	Feeling good…	Feeling bad…
Physical	• Sleeping well • Ready to jump out of bed • Not feeling bloated • Ready for exercise • Lots of energy • Skin is fresh and glowing	• Feeling sluggish and tired • Feeling lethargic • Feeling bloated • Craving carbohydrates • Headaches
Mental / Emotional	• Feeling light and lively • Better mental skills • Happy and cheerful • Able to think clearly	• Feeling guilty • Unable to concentrate, poor memory, slow speed of though • Stress and anxiety • Moodiness / irritation
What leads to these feelings?	• Good hydration • Taking vitamins and nutritional supplements, particularly in the winter (Vitamin C, Vitamin D, Multivitamin) • Exercise • Relaxing (music, meeting friends, time with family)	• Poor sleep • Bad weather • Sad events • Negative thoughts • Emotional problems • Heavy workload • Too much television
Remedies	• Physical activities / a good workout / fresh air • Take vitamins (Vitamin D, Vitamin C, Iron formula, Multivitamin) • Better hydration • Fizzy / energy drinks and 'naughty' foods (for some) – 'have a takeaway'! • Relaxation or a change of scene	

UK — *I have previously taken supplements, but I didn't feel they made a difference. If I'm feeling really sluggish I will have an energy drink (Francesca, 39)*

Poland — *I wake up and I feel like doing everything. I'm full of energy, strength. I feel great! That depends on the hygiene of life. In my case sleep is crucial.* (Beata, 40)

Germany — German participants mention lack of motivation and laziness as symptoms of feeling bad – leading to making more mistakes and having difficulty concentrating.

Greece — *All sensations are pumping and I am smiling (Efi, 39)*

Russia — Russian participants feel that eating something that makes you feel happy (even if it's unhealthy) is at least a short term solution to feeling bad.

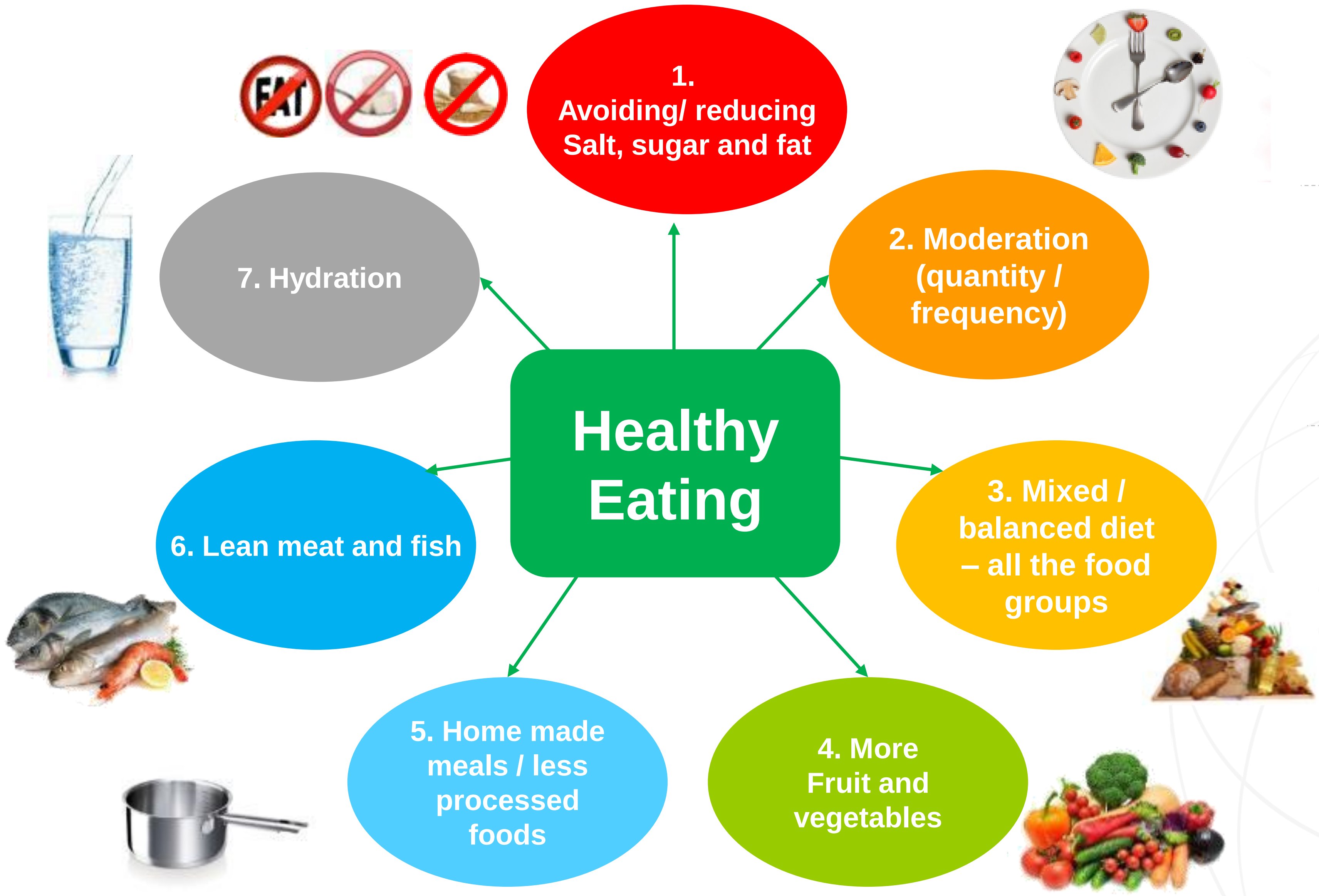
Croatia — *On a good day, you have so much energy on both a mental and physical level that you're dashing, energetic and the body cooperates in everything you think about (Klara, 32)*

Turkey — *If I go to bed happily, I wake up in a good mood. I see little details in life in places I go and breathe the air deeply (Cenk, 41)*

Hungary — *If your body gets everything it needs then you feel good. If something is absent our body warns us and we know there is a problem. (Szilvi, 39)*

Brazil — *I feel sleepy. I have a hard time concentrating and keeping focused. Ideas just don't come to mind and the day seems endless (Adriano, 40)*

Meaning of Healthy Eating



Poland UK Croatia Russia Turkey

In these markets, there was a particular focus on preparing home made meals from raw ingredients and avoiding processed / ready meals

Greece Turkey

In Turkey and Greece, the importance of having a 'regular diet' was highlighted alongside diversity of diet. In other words, eat all the food groups, but keep to the same set of recipes (in general)

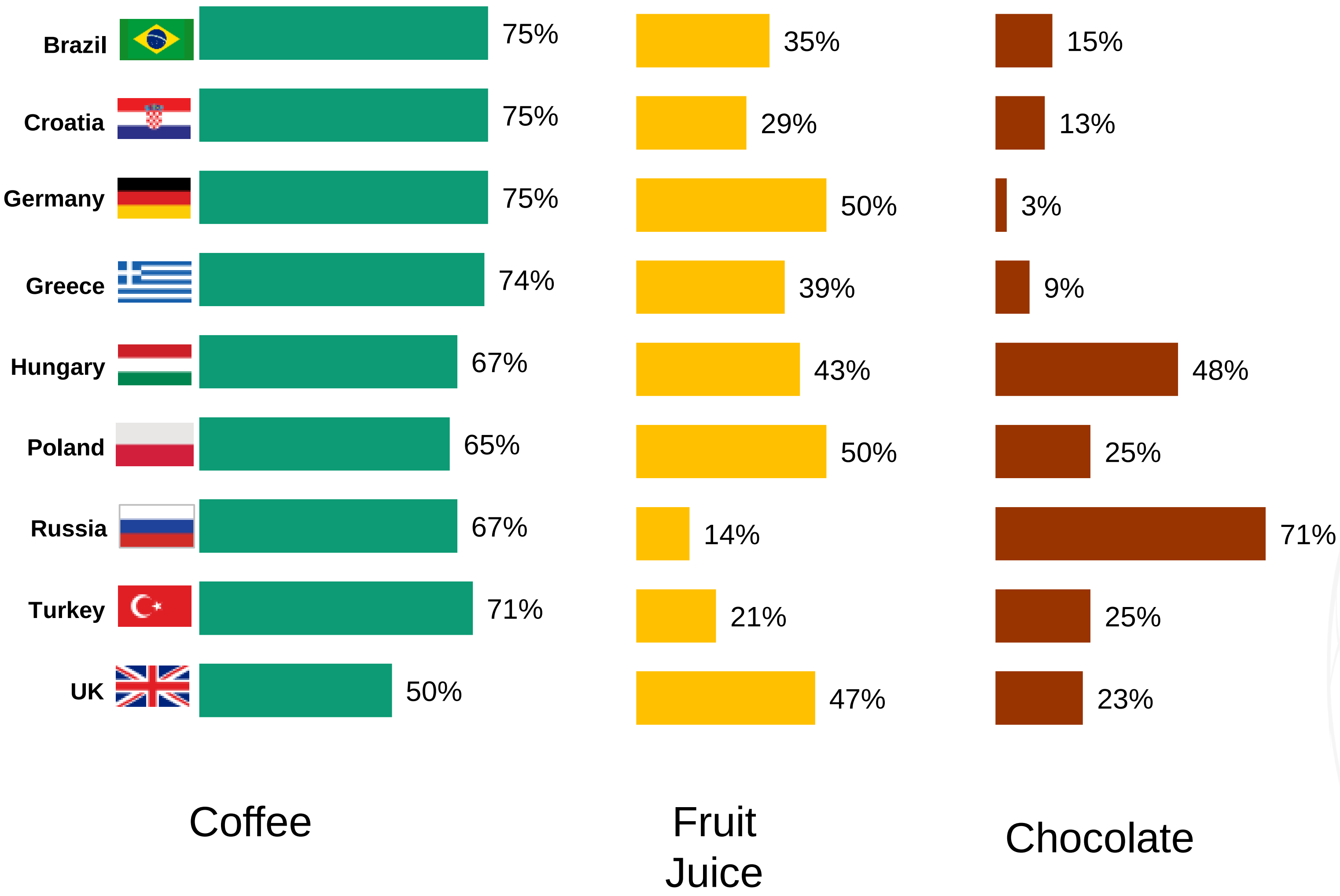
Hungary

In Hungary, dairy products are regarded as a particularly important element of healthy eating

Foods frequently eaten and the daily routine

Frequently eaten foods: Drinks / Snacks

Which of these products do you eat or drink at least 3 or 4 times per week?



Reassuringly, 9 in 10 across all markets eat vegetables 3 to 4 times a week and 8 in 10 eat fruit with the same frequency!

Russia

Russians are the most regular consumers of chocolate, with 7 in 10 eating 3 to 4 times a week. Hungary is the only nation that comes close to this, with around half eating chocolate with the same frequency

UK

In the **UK** more tea / fruit tea is drunk than coffee, which is regarded as a stimulant

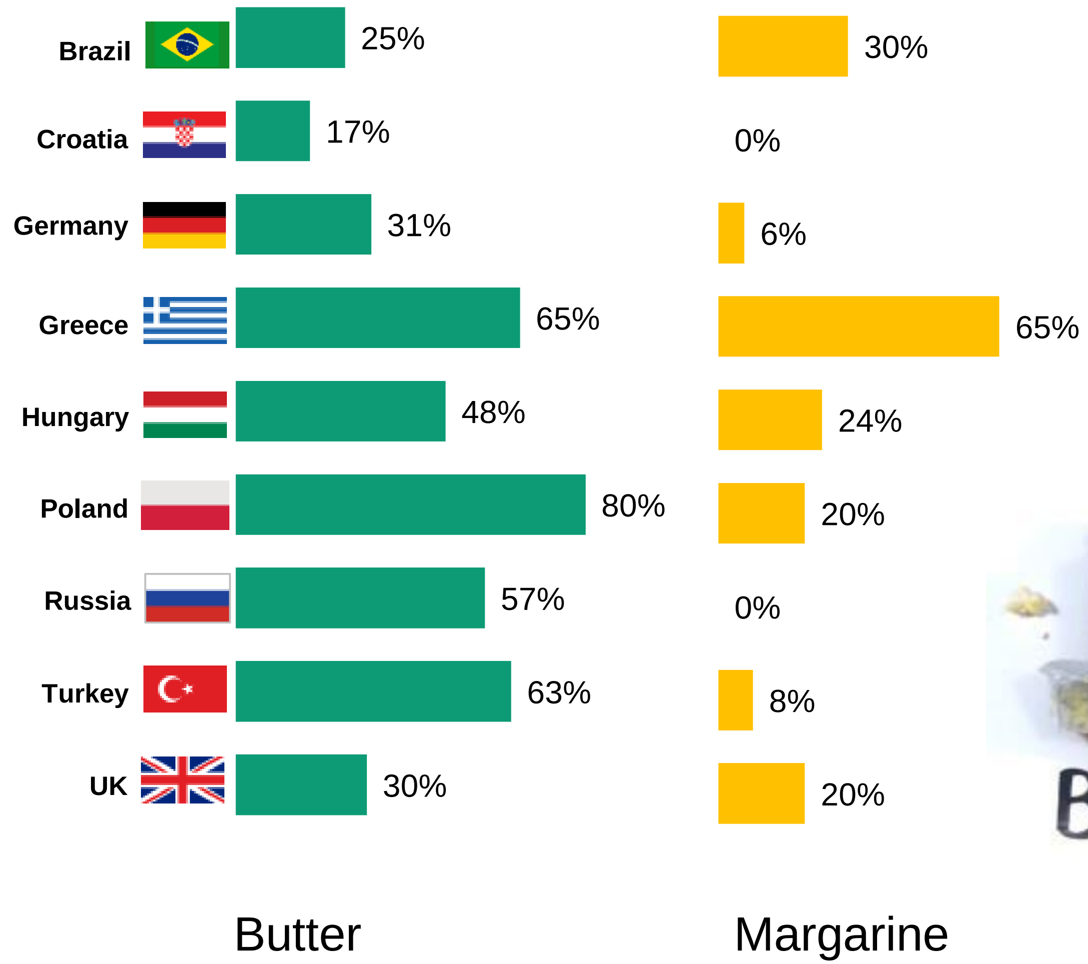
Germany **Poland** **Hungary**

Fruit juice is another polarising foodstuff, with half of those **in Germany, Poland and Hungary** eating this regularly, but much lower frequency of consumption in **Russia and Turkey**

NB: Findings are indicative based on 209 participants in total

Frequently eaten foods: Spreads

Which of these products do you eat or drink at least 3 or 4 times per week?



Greece

Greek participants are the most frequent consumers of margarine

Croatia Russia

However, margarine is hardly eaten by either **Croatian or Russian** participants

Greece Poland

Polish and Greek participants are the biggest butter consumers

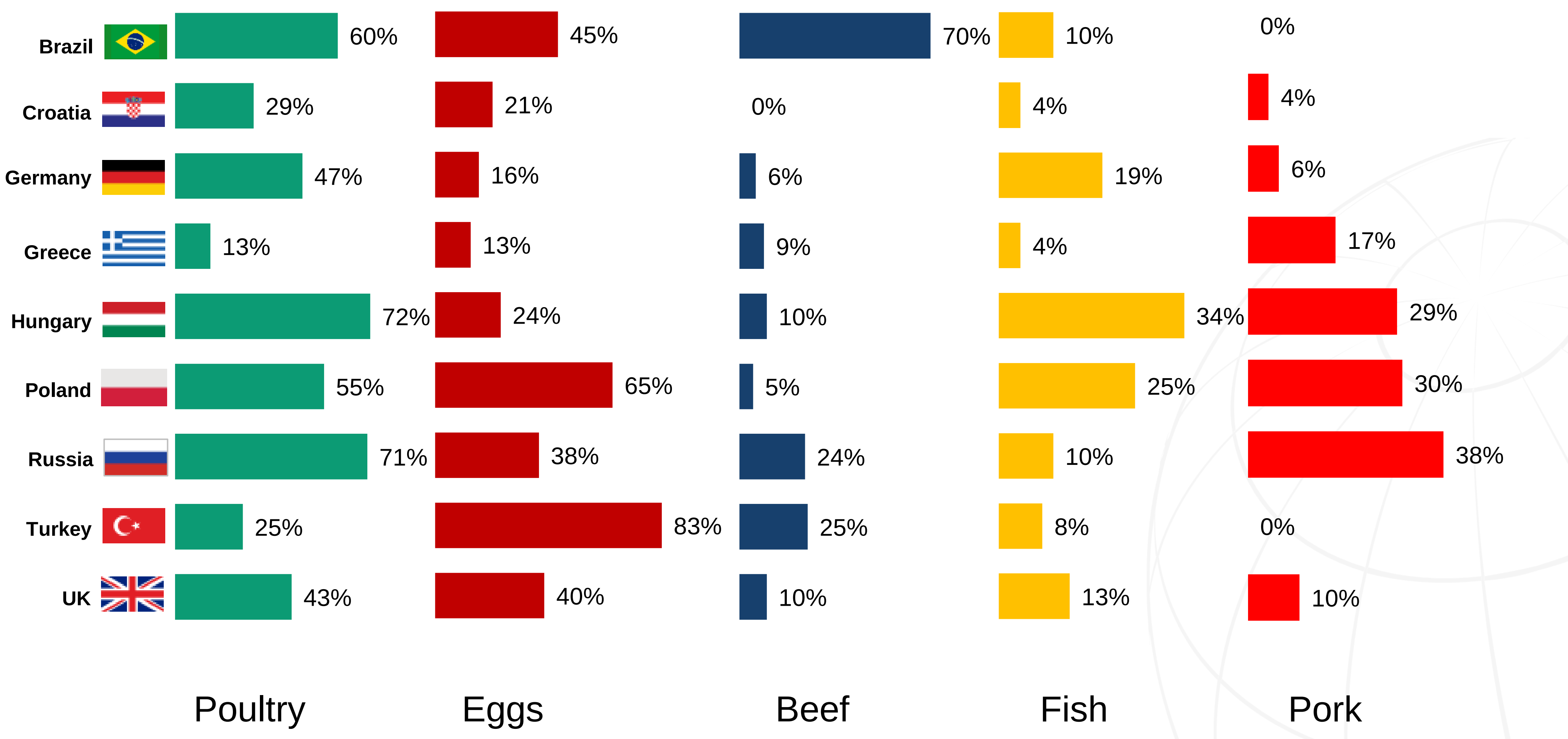
UK

In the UK, participants talked of a transition back to butter from margarine in recent years

NB: Findings are indicative based on 209 participants in total

Frequently eaten foods: Proteins

Which of these products do you eat or drink at least 3 or 4 times per week?



- Whilst nearly half eat poultry 3 or 4 times a week, this falls to 1 in 5 who eat beef with this regularity and much lower for pork and fish
- **German and Poland** participants are amongst the most regular eaters of fish and Brazilian participants are far the most regular eaters of beef
- Perhaps understandably, **Turkish** participants ‘never eat’ pork, although **Brazil and Croatia** also have lower than average consumption rates amongst participants.

NB: Findings are indicative based on 209 participants in total

Breakfast

Weekday

Bread is a universal breakfast food among participants in all markets.


Croatia


Hungary

Cold cuts were popular in Eastern Europe, particularly in Croatia and Hungary.

Eggs were also popular, eaten in the UK, Croatia, Greece, Germany and Turkey.

Cheese was popular in some regions, particularly Brazil, Turkey and Poland.


Hungary

Vegetables (paprika, tomato, cucumber), and oatmeal was popular in Hungary and it was similar at the weekend

Weekend

Eggs became universally popular at the weekend.

Dairy products eaten in Germany, Turkey, Croatia, Hungary and Brazil.


Hungary

Cold cuts became less popular at the weekend, only eaten in Hungary.

Bread eaten less at the weekend in some markets, but still in Germany, Croatia, Hungary, Greece and Brazil.


Brazil

Turkey breast eaten in Brazil by some participants.

Lunch

Weekday

Lunch is typically a light meal; salads and soup are popular in almost every country.

Pasta and rice eaten in some regions: Germany, Croatia, Brazil, Turkey.


Croatia


Hungary

Heavier lunches in Eastern Europe, eating foods such as potatoes and meats. Croatia and Hungary in particular treats lunch as the main meal of the day.

Weekend


UK


Germany

Heavier/Less Healthy lunches eaten at the weekend, particularly in Germany and the UK.


Brazil


Greece


Hungary

Wider variety of foods eaten than during the week, especially in Brazil, Greece and Hungary.

Dinner

Weekday

Hungary **UK** **Turkey**

Dinner serves as the main meal for most regions, with particular emphasis in Turkey, the UK and Hungary, where participants mentioned this was the key meal of the day, or the only cooked meal.

Hungary **Croatia**

Typically heavier than other meals in most countries, with the exception of Croatia and Hungary, with participants more likely to have meat or fish in their dinner.

Weekend

As with lunch, a wider variety of food is eaten at the weekend.

Hungary

Some of Hungarian participants mentioned that they eaten their lunch to dinner again.

Germany **UK**

Unhealthier food eaten when compared to during the week, especially in the UK and Germany, with the UK favouring heavier cuisines such as Italian and Indian foods.

Snacks, Sleep and Exercise

Weekday

Fruit is a universally popular snack, although Chocolate is favoured in the UK, Hungary and Greece. Nuts are popular in Turkey and Brazil.

Greece **Hungary**

Most sleep around 7 hours during the week, although it is slightly less in Greece and Hungary.

Croatia **Turkey**

Majority of participants do on average an hour of medium intensity exercise per day, apart from in Turkey and Croatia where it's more like 30 minutes.

Weekend

Brazil **UK** **Germany**

Brazilian participants don't tend to snack during the weekend. Chocolate is popular in other markets though, and there is a tendency to eat less healthy snacks at the weekend in the UK and Germany.

Brazil **Turkey**

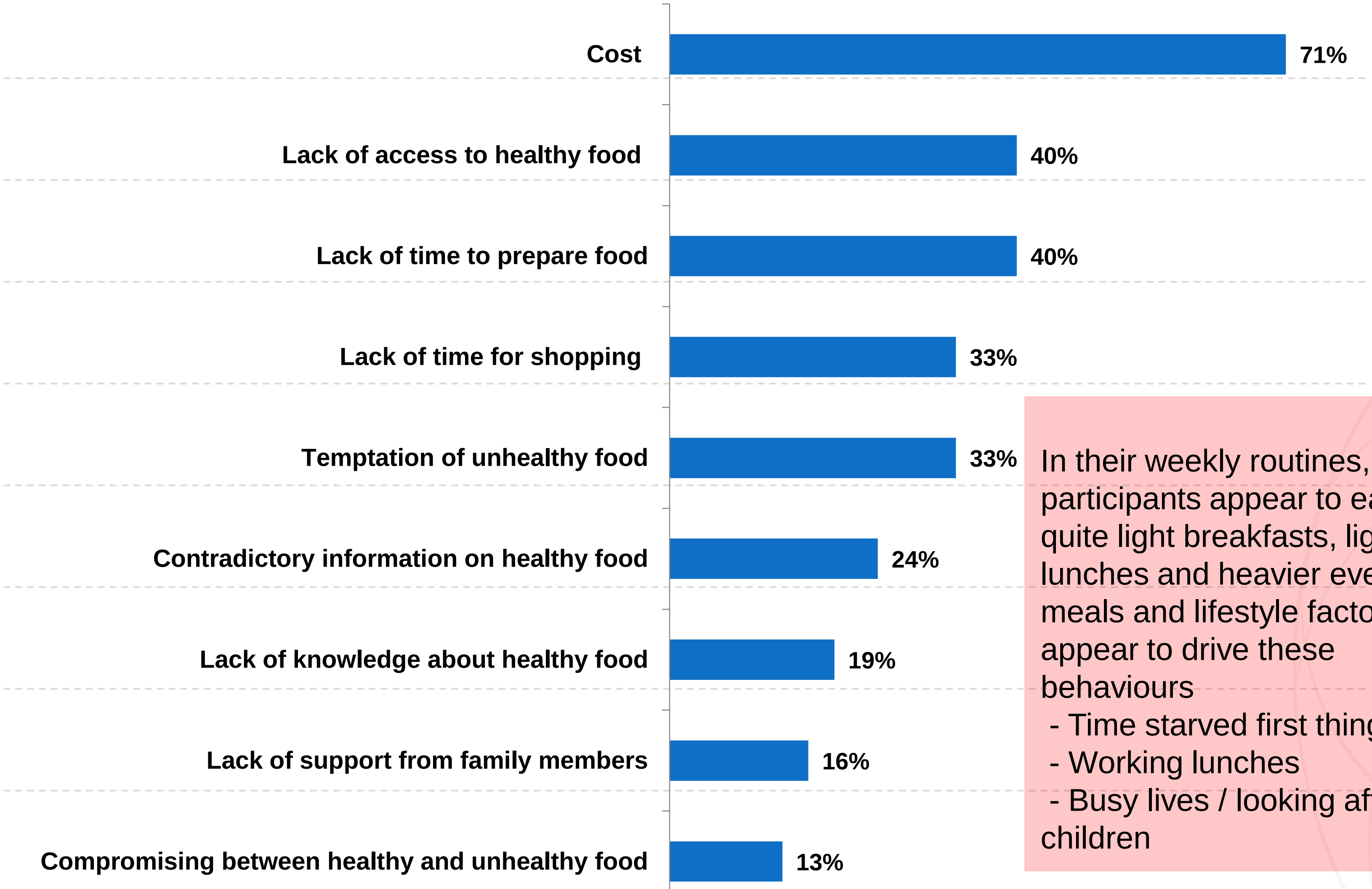
participants sleep slightly longer at the weekend, sleeping 7 ½ hours on average, with participants in Brazil and Turkey sleeping slightly longer.

Brazil **Hungary**

Fewer participants exercise at the weekend in some regions, such as Brazil and Hungary, however, the average amount of time spent exercising increases an hour or more of moderate intensity.

Barriers and Challenges to Eating Healthy

Which of these factors stop you from eating as healthily as you would like to?



In their weekly routines, participants appear to eat quite light breakfasts, lighter lunches and heavier evening meals and lifestyle factors appear to drive these behaviours

- Time starved first thing
- Working lunches
- Busy lives / looking after children

NB: Findings are indicative based on 209 participants in total

UK Lack of time is cited as the most common barrier to eating healthy. Social pressures are also blamed for consuming unhealthy products.

Poland The price of healthy food, as well as a lack of access to healthy food are far less significant than on average in this region. Respondents are also more likely to be tempted by unhealthy food.

Germany Lack of knowledge is far less of a barrier in this region, with only 6% listing it as a barrier. Lack of time to shop and contradictory information on healthy food are more common in this region than average.

Greece Less likely to find the temptations of unhealthy food to be a barrier to healthy eating. However, a lack of time to prepare food is a larger barrier than is average.

Russia Lack of access is almost twice the barrier in this region than it is on average, as is a lack of knowledge about healthy foods. However, time for shopping is far less of a barrier in this region.

Croatia Croatian respondents are the least likely to be tempted by unhealthy food. However, a lack of time to shop for healthy food is more likely to be a barrier than in other regions.

Turkey Unlike other Regions, a lack of access to healthy products is the primary barrier to healthy eating, rather than cost. A lack of knowledge/awareness is the least common barrier.

Hungary A lack of knowledge about healthy food, as well as contradictory information about healthy food, are more significant barriers in this region than on average.

Brazil Temptations of unhealthy food is a far bigger barrier in this region than others, with three-fifths of respondents citing it as a barrier. Social events such as barbecues were viewed as major ‘villains’.

Healthy and Unhealthy Food

Healthy vs. Unhealthy Food and Drinks

Healthy food and drinks	Unhealthy food and drinks

Food

Healthy

- 'Quality foods' – fresh, locally sourced, well grown
- Vegetables, salads and fruits
- Whole grain products, oatmeal
- Dairy products (milk, cheese, yogurt) – for some
- Home cooking

Light and vitamin-rich food

Unhealthy

- Fast food
- Chocolate and sweets
- Crisps
- Processed food (frozen foods, fast food)
- Biscuits
- Cereals high in sugar

Tasty, quick and convenient… but fattening

Drinks

Healthy

- Mineral water, tap water
- Juices

Unhealthy

- Carbonated drinks (full fat)
- Diet carbonated drinks
- Alcohol

Motivation

Lots of attention to family health

…natural ingredients, balance, variety and home made cooking

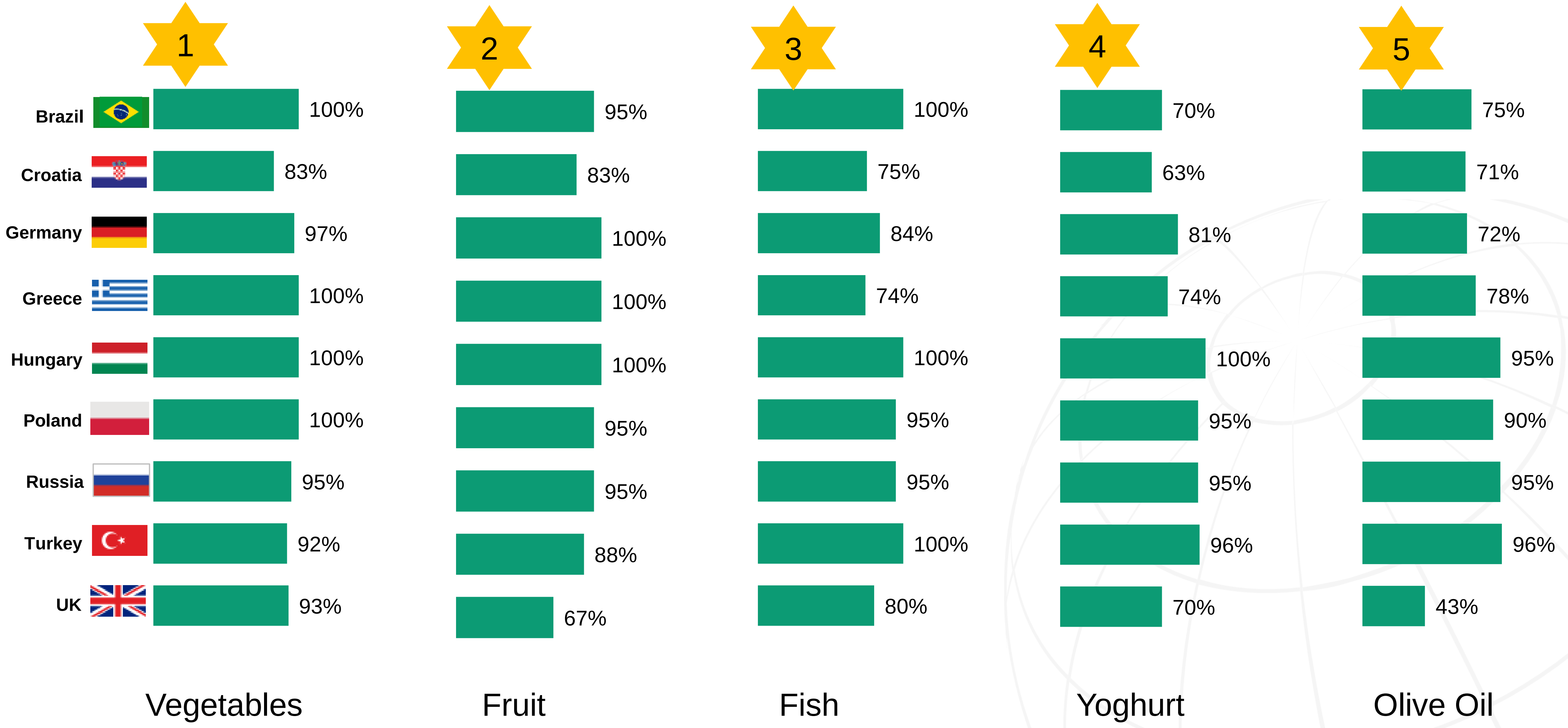
Lack of time / convenience

Temptation

Unhealthy food is permissible, but it is important to be moderate

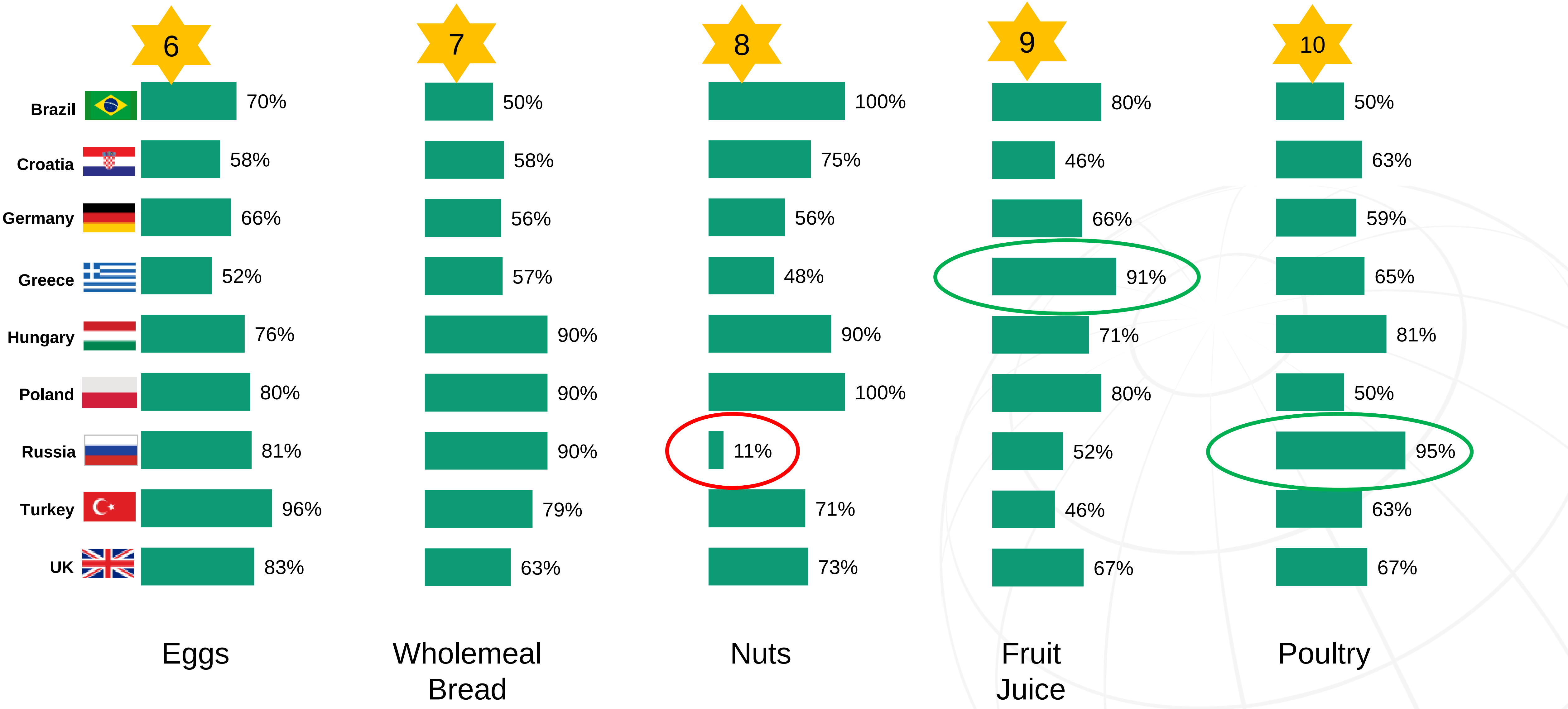
UK	Despite believing children's health is important, buy unhealthy food as a 'treat' for them. 'Quality foods' are a key source of healthy food.
Poland	Balanced diet is key to healthy eating, providing a good example to children is important to participants. High sugar is considered the most important aspect of unhealthy food.
Germany	Try to have a good variety of food, eating unhealthy food a few times a month is viewed as acceptable.
Greece	Food companies blamed for obesity, and participants feel that they should produce healthier food. Feel that Spring/Summer are a driver to lose weight.
Russia	Family health is the key motivation behind healthy eating. Natural ingredients and food is considered essential to a healthy diet. Unhealthy food is 'fast' easier to prepare and acceptable in small quantities.
Croatia	Unhealthy food considered better tasting and easier to prepare, and ok to consume in moderation. Healthy food is viewed as something which is necessary to eat.
Turkey	Healthy food eaten to stay healthy and avoid sickness, while unhealthy food is eaten rarely, or in the absence of alternatives.
Hungary	Unhealthy food is viewed as permissible, but moderation is important. Vitamins and nutrients are key to healthy food. Eating healthy necessary to avoid illness.
Brazil	Although unhealthy food typically 'tastes better', participants choose healthy food options based on taste and enjoyment. Unhealthy food viewed as faster and more convenient.

Top 10 healthiest foods: 1/2



NB: Findings are indicative based on 209 participants in total

Top 10 healthiest foods: 2/2



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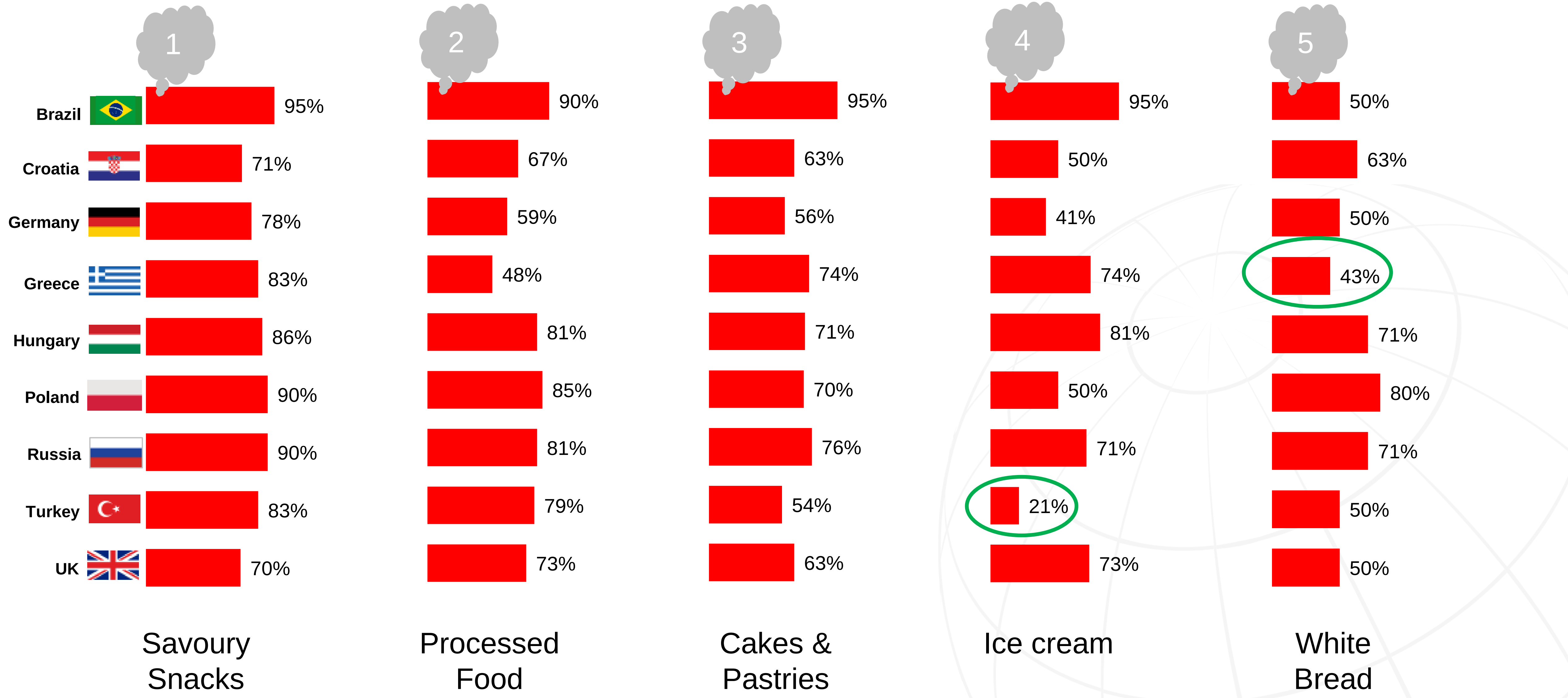
Top 10 unhealthy foods: 1/2



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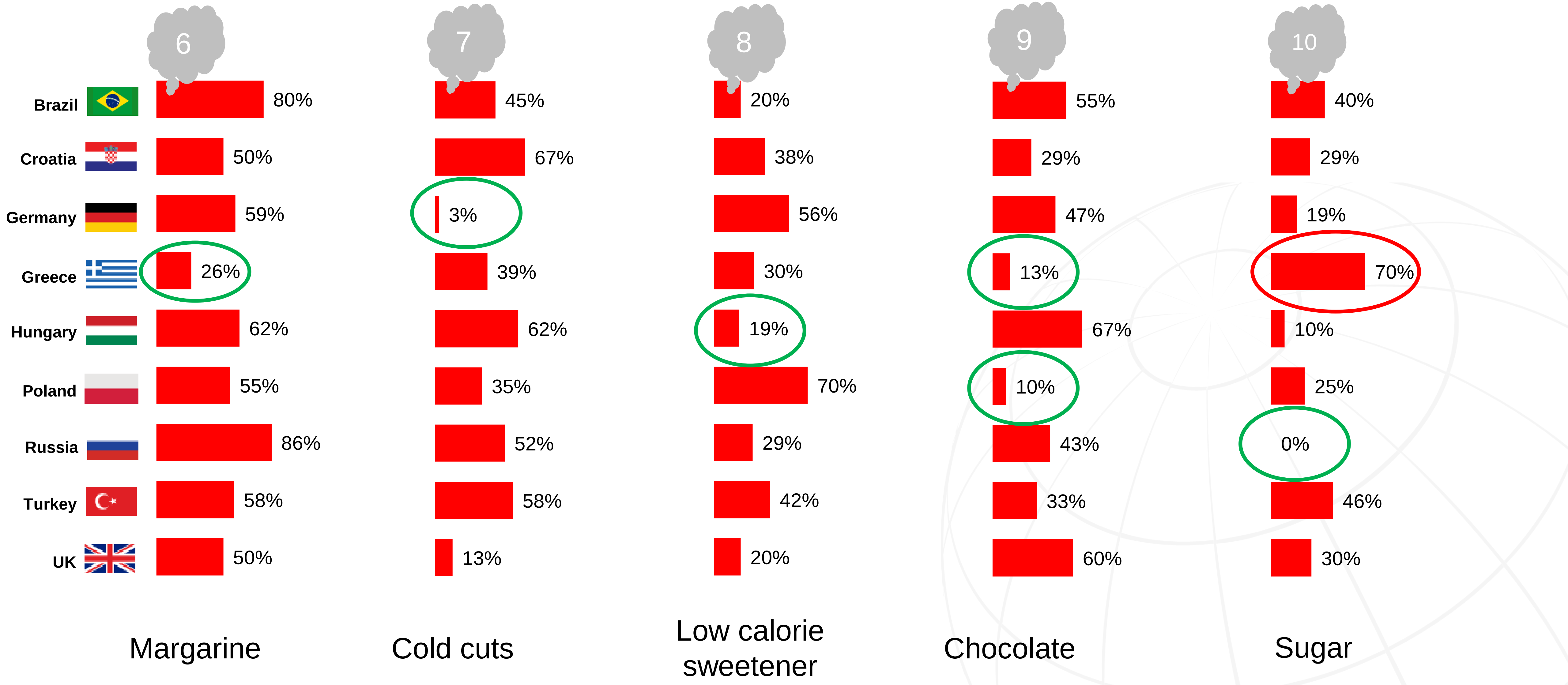
Top 10 unhealthy foods: 2/2



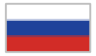
NB: Findings are indicative based on 209 participants in total

Features of Healthy Food

The key elements of health food across all markets are natural ingredients, no artificial ingredients and no preservatives.

The next tier of requirements include unprocessed food, eco / organic food and low fat food, although the latter is relatively less important in Poland and Croatia.

Foods without sugar are relatively more important to Brazilians and Greeks, but less so in Eastern European countries. The same is true for foods which contain vitamins and minerals.


Russia


Turkey


Croatia

Russian, Turkish and Croatian consumers prefer foods that are glucose and fructose free, although this is far less of an issue in other markets.


Greece

8 in 10 Greeks mention the importance of vegan or vegetarian foods, although far fewer list this as critical in other markets.

Daily Hydration

Hydration plays a key role in well being. Across all countries in the research, people are aware that sufficient hydration (more or less 2 litres) is essential, but some struggle to achieve this and other supplement with other fluids such as juices and hot drinks

Amount of fluid

Average amount: 1.5 and 2.5 litres/day, although some drink as much as 3 litres

"I drink at least 2 litres of water a day; not because I particularly like it, but because my body needs it. I have my 500ml bottle to hand and when it runs out I fill I up again (Geiva, Brazil)

Types of fluids

Most popular beverages are:

1. Water / mineral water
2. Tea and coffee
3. Diet drinks
4. Juices

"My name is Francesca and I'm a recovering Diet Coke addict" (Francesca, UK)

UK
Most drink between 1.5-2.5 litres, although few pay much attention to their water intake. Participants drink a wide variety of fluids.

Poland
Majority aware that proper hydration is important to good health, but not able to drink enough water, especially during colder seasons.

Germany
Water is the most commonly consumed beverage. participants consume between 1.5-3 litres of fluid a day, and men tend to consume more than women.

Greece
Consume 2-3 litres daily on average. Men drink slightly more than women, and some participants admit that they forget to stay hydrated. Fruit juices are preferred to water.

Russia
Drink between 1.5-2 litres of fluid per day, and more if taking part in physical activity. Climate issues lead to a greater consumption of warm drinks. Some use 'tricks' to drink more fluid.

Croatia
Daily intake between 1-3 litres per day, mostly water, with alcohol and soft drinks saved for social settings. Some felt the recommended intake of water was too much for their needs.

Turkey
2-3 litres consumed on average. Women drink slightly more than men, especially with regards to herbal teas, which men don't tend to consume. Awareness of needs a barrier to consumption.

Hungary
Men drink more than women. Average consumption 1.5-2.5 litres. Fruit syrup/squash more popular than fruit juices in this region. Some women felt that trying to stay hydrated has caused issues for them.

Brazil
Participants consume 1.5-2 litres, although some consume 3-4. Drink water because they feel they must, and consume a certain amount each day. Coconut water popular in this region.

The Healthiest Cuisine

Some very mixed views, particularly around Italian and Chinese cuisine which can be both heavy / unhealthy and light / healthy depending on what one eats. Greeks, Turks and Russians reckoned their own cuisines were healthiest of all, and Brazilians said that only vegetarian and Japanese food was healthier than Brazilian food. Other nations rated their own cuisine less healthy

UNHEALTHY → **HEALTHY**

Unhealthy:

- **Russian, German, British, Hungarian** heavy, fatty foods
- **American** Fast food, processed food, large portions
- **Indian** can be fresh and light, but more often heavy and oily
- **Chinese** glutinous, heavy, fast food with too much sodium
- **Italian** - Pasta, dough, cheese

Healthy:

- **Japanese** sushi, noodles, fresh ingredients
- **Turkish and Greek** (Mediterranean diet), and **Russian** (soups and porridges)
- **Brazilian** protein, rice, beans and salad
- **Chinese** rice, vegetables, chicken, fish
- **Italian** - Mediterranean salads etc.

UK	Asian cuisine viewed as most healthy, although Chinese is considered less healthy than Japanese. Indian Cuisine considered the least healthy, due to its association with alcohol consumption.
Poland	The origin of the cuisine is not as important as the way the food is prepared when considering healthiness. However, Italian and vegetarian cuisines are considered healthiest.
Germany	Italian food considered healthiest cuisine. Germany's own cuisine is considered fairly unhealthy. Mixed attitudes towards Asian cuisines, Japanese food considered healthy though.
Greece	Food companies blamed for obesity, and participants feel that they should produce healthier food. Feel that Spring/Summer are a driver to lose weight.
Russia	Russian cuisine considered the healthiest, with Mediterranean and Georgian cuisine also scored highly. Italian and American cuisines, as well as those that use lots of spices, are considered unhealthy.
Croatia	Chinese food considered the healthiest cuisine with Japanese food also rated highly. Vegetarian and American cuisines were considered less healthy.
Turkey	Turkish cuisine is viewed as the most healthy, as well as Italian, due to balanced portions and fresh ingredients. Chinese considered least healthy, due to bad reputation of street food.
Hungary	Hungarian cuisine is viewed as one of the most unhealthy. Asian cuisines considered healthy, as is Greek cuisine.
Brazil	Vegetarian food considered most healthy, although some view it as unhealthy, as it doesn't meet all of their needs. American food least healthy, participants divided on Italian and Chinese foods.

Unhealthy Behaviour

Habit and a somewhat distorted sense of ‘balance’ leads to unhealthy eating

When?

- **Public Holidays and festivals**
- **Social and family events / gatherings**
- **Holidays and travelling**
- **Nights out with friends**
- **When working / with colleagues**

Rationale

- **You can’t eat healthily all the time** it’s not ‘healthy’ (mentally) or fun. Healthy eating can be dull / boring
- **You need to relax / de-stress** (especially after a hard day)
- **Unhealthy foods taste great** and have strong flavours which are hard to resist

When is unhealthy food acceptable?

When there are no easy alternatives – when you need a ‘break’

UK View unhealthy food as a treat, something that is eaten occasionally as a treat, to break up long periods of ‘boring’ healthy eating, or if there are no alternatives.

Poland Unhealthy food mainly consumed when there is no other option, due to a lack of time, or don’t want to prepare healthy food. Unhealthy food viewed as a ‘guilty pleasure’.

Germany Unhealthy eating tends to be at social events/ special occasions. Tend to also eat unhealthily at weekends, as a break for their diet in the week. Price of healthy food/lack of time drive unhealthy behaviour.

Greece Unhealthy food is seen as an acceptable ‘cheat’ on their diet from time to time. Unhealthy food mostly consumed at special occasions or if they are feeling stressed/anxious.

Russia Holidays and special events viewed as times for unhealthy eating. There is also a belief that you can eat whatever you want, however unhealthy, as long as it is in the morning.

Croatia Unhealthy food eaten on Sundays, although special occasions or a lack of time to prepare food can also lead to unhealthy eating. Also used as a reward for healthy eating.

Turkey Unhealthy food eaten on public holidays and special occasions. Often eaten if there are no other alternatives. Viewed as acceptable to eat unhealthy food from time to time.

Hungary Unhealthy food eaten at social or special occasions, or if there are no alternatives available.

Brazil Unhealthy food is mostly consumed on special occasions, and believe it is ok to treat themselves once or twice a week. Unhealthy food mostly eaten for pleasure.

About Fast Food Restaurants

Participants in Brazil, Turkey and Poland felt that their own local chains were healthy, but not the globally branded chains

Which of the following brands tries to present a healthy image through their advertising and brand?

	SUBWAY	McDonald's	KFC	BURGER KING
Brazil	75%	0%	10%	0%
Croatia	0%	50%	8%	4%
Germany	53%	13%	6%	3%
Greece	0%	4%	0%	0%
Hungary	48%	52%	24%	5%
Poland	25%	75%	70%	55%
Russia	38%	57%	14%	5%
Turkey	8%	21%	17%	21%
UK	27%	13%	13%	17%

UK: None of the fast food brands regarded as having a healthy image. McDonalds felt to be trying, but not succeeding.

Poland: All of the brands viewed as trying to put forward a 'healthy' image. Burger King and KFC were the only brands that were not considered by any participants to offer healthy products.

Germany: Over half the participants recognised that Subway try to put forward a healthy image, but only 22% actually perceived their products as healthy. No other brands perceived as having healthy products.

Greece: The Greeks didn't feel that any fast food brands had a healthy image, even their own local brands. 9 in 10 voted for 'none of the above'!

Russia: Almost three-quarters of participants didn't view any of the brands as offering healthy products. However, a quarter of participants didn't view any of the brands as trying to put forward a healthy image.

Croatia: Three-fifths recognised McDonald's as trying to put forward a healthy image. However, none of the brands were viewed as actually providing healthy products.

Turkey: Almost three-fifths of participants didn't view any of the brands as having a healthy image. Turkish fast food brands more likely to be viewed as healthy.

Hungary: Less than a fifth of participants didn't believe any of the brands tried to put forward a healthy image. Burger King and KFC weren't perceived as having healthy products by any participants.

Brazil: Subway was the brand most recognised as putting forward a healthy image. Spolet and Subway are tied for most recognised as offering healthy products.

NB: Findings are indicative based on 209 participants in total

Bio, Organic and Functional Food

Knowledge of Bio, Organic, Eco Products

Overall, participants struggled to disaggregate Bio from Organic. Rather than terminology, they focused on how it was grown, how it was packaged and what was on the label (and whether they trusted this or not)

Bio / Organic - cultivation

- **Chemical-free, fertilizer-free**
- No use of preservatives
- Produced under natural conditions / free range / sustainable / environmental
- GM free

Eco products

- **Recyclable packaging**
- Bio-decomposed packaging or leftovers
- Not harmful to the environment

Cultivation

Certification

Product experience

Bio / Organic - certification

- **Having the right label**
- Bio seen as more expensive / exclusive than Organic in some markets
- GM free

" Bio doesn't mean anything to me. Organic makes me think of something grown naturally with less action from man"(Francisco, Brazil)

UK	Struggled to define precisely what organic food meant. Term associated with simple packaging and a lack of 'unnatural' and 'artificial' ingredients.
Poland	Bio/organic products viewed as more natural/traditional. Also, some reputation for less attractive products/packaging.
Germany	Not able to give a distinct definition for each term, but all considered to be natural and fresh, with no chemicals or additives/preservatives. Higher prices/quality expected.
Greece	Mixed notions, but difficult to differentiate terms. Eco products typically associated with recyclable packaging. Whereas bio and organic were associated with natural/chemical free products.
Russia	Not able to differentiate. Terms viewed as synonymous. Natural ingredients and higher quality assumed, as is higher price.
Croatia	Can't differentiate between terms, but all three terms were associated with healthier, more nutritious food and a better taste.
Turkey	Little differentiation between terms. Associated with a better quality of product, as well as seasonal and natural productions.
Hungary	Mixed notions, participants had trouble differentiating terms. Greatest knowledge about 'bio' products. Assumed to be chemical-free. Higher price/quality expected.
Brazil	participants couldn't distinguish between the various products very well. participants generally accepting of a higher price for these products, associated with 'healthy food'.

Bio / Organic Products drivers and barriers

Participants are mistrustful about the authenticity and origin of these products, particularly those that seem to be mass produced. There is more faith in products grown and sold locally in rural communities or grown by participants themselves.

Goods purchased: meat, vegetables, fruits, cereals, yoghurt, eggs

Drivers to buy

- Perceived nutritional benefits (for self / children)
- Health / allergy problems
- Pregnancy / young children
- Perceived better taste
- Perceived higher quality

Barriers to buy it

- **Price**
  - Considered high compared to other products
  - Higher degree of waste than convenience foods
- **Lack of trust** in the labels and certification and how this is regulated (if at all)
- **Availability**
  - These products are not available in all supermarkets
- **Lack of knowledge**
  - They have difficulty stating specific advantages
  - ”It is more about knowing that I am not poisoning myself”

Needs

- **Specific advantages**
  - Why is this better? Why should I pay more? Why should I trust labels?
- **Product Appeal**
  - I’m paying more. Make it look good!

“I like the idea that things have less chemicals and are generally more healthy. The price massively puts me off and in a lot of circumstances makes it unaffordable” (Niraj, UK)

UK Price a major barrier, as well as a mistrust of the authenticity or quality of organic products. Demand greater for families due to health concerns.

Poland Price is a barrier, as are concerns about credibility of bio/organic products. Most participants generally view these products as being more healthy as ‘how food used to be’.

Germany Price is the biggest barrier to consumption at the moment, as well as a lack of awareness of specific benefits and improving reliability and marketing products more clearly.

Greece Price, and dubious origins and authenticity of some products a barrier to consumption. Believe stronger controls on producers are needed, as well as making bio-products more widely available.

Russia Price and a lack of trust of bio/organic products are the main barriers. participants also feel that they need to be aware of more specific benefits of choosing these products.

Croatia Mistrust of the authenticity and origin of bio/organic products is the biggest barriers to consumption. participants feel however that these products are healthier/better tasting.

Turkey Achieving and maintaining competitive prices is key to ensuring consumption. Consumers are also doubtful about the origin and authenticity of products.

Hungary Price is the biggest issue. Feel they need to be made more aware of the benefits of choosing organic products, as well as ensuring authenticity.

Brazil Price and a lack of widespread availability are the major barriers to consumption. Spreading awareness of benefits is also needed.

Knowledge of Functional Food

The terminology is unfamiliar and needs to be explained. When it is explained it's either associated with foods that have natural food benefits (good) or foods that have vitamins or minerals artificially added (mixed views on this).

Functional food

Associations

- Basic foods – oats, fish, berries
- Stated benefits (e.g. fish high in omega oils)
- Foods enhanced with vitamins or minerals (positive)
- Exotic / trendy
- Improving body function
- Disease prevention (e.g. folic acid)

"There is a chance that some of our meals contain functional ingredients, but we have never talked about functional foods with our friends and relatives" (Mara, Greece)

UK	participants were not familiar with the concept initially, but once it's explained, they understand that they are regular consumers of such products.
Poland	Majority never heard of the term, but many do eat various products for specific health benefits. Although they aren't always aware of the exact benefits, rather than just being healthy.
Germany	participants are not really familiar with the concept, but assume functional foods refer to vegetables and other healthy meals.
Greece	No familiarity with the concept, but once it is explained to them, they understand they are consuming functional products. Mostly associated with cereals and dairy products.
Russia	Not familiar with the term, and having the term explained didn't help clarify the issue. participants believe all food is 'functional', but they also do consume functional foods.
Croatia	Diverse responses, some had a detailed understanding of the term, others had never heard of it. Once the term was explained, participants were able to identify the functional products they used.
Turkey	Not familiar with the term, associated with probiotics and weight-loss products. With the concept explained, it is associated with nuts and milk.
Hungary	Not familiar with concept, and have no preconceived associations with the term. However, some are consuming 'functional' products, and associated them with 'healthy food'.
Brazil	Don't completely understand the concept. Have a vague idea that the foods are natural and plentiful in vitamins and nutrients, and would have other benefits.

Functional Food in Healthy Life

There is widespread distrust and uncertainty (what they include and how)
The priority of companies to increase sales also appears as a negative factor

Other goods purchased: whole meal bread, porridge oats and fish

TRUST

Whole grain products / oats

- **Providing fibre / roughage / and highly 'natural'**
- Consumed most often
- Considered healthy

Yoghurts /Dairy with extra probiotics or calcium

- **Popular among participants**, some prefer plain yoghurt
- Most see dairy as healthy, but some concern about the high fat content of some dairy products, particularly cheese
- Probiotics considered more useful than those with extra calcium
- A few associate dairy with stomach issues

Margarine with omega 3 fatty acids

Mixed view on this

- In some markets, (Germany, UK, Russia) margarine is regarded as unhealthy and most prefer butter
- Some participants in other markets regard the omega 3 addition as good for the heart / positive
- Indications that this is an area where perceptions are shifting

Fruit Juices with added vitamins

Many reject this as unnatural

- Has additional materials – not like freshly squeezed versions
- Processed / artificial
- Too much sugar, sodium, preservatives
- Popular /seen as healthy amongst German respondents but not in other countries

UK: Widespread distrust of functional products. Not aware of what they contain how they benefit them. Wholegrain products are popular among sample.

Poland: Term is associated with artificial products. Many don't believe they use them, but do purchase these products, although not always aware of the benefits. Greater awareness among athletes.

Germany: Half of the sample did not buy functional food. Fruit juices and yoghurts were popular among those who die, and whole grain products were divisive among participants.

Greece: Some confusion over what these products contain and how they help you, wholegrain products are popular among participants however.

Russia: Believe that functional food is less 'natural', and that the functional label is used by producers as an excuse to raise prices.

Croatia: Considered healthy, and useful for preserving a healthy digestive system. Wholegrain products, in particular bread and pastry, as well as yoghurts are most popular.

Turkey: Widespread distrust and uncertainty over the effectiveness of functional products. Distrust also applied to additional materials about these products, such as advertising.

Hungary: Distrust and uncertainty of what products contain and how they benefit them. Wholegrain products and yoghurts popular with sample.

Brazil: Do not have faith in the benefits these products claim to have. Tend to trade food recommendations with friends and family. Whole grains/yoghurts popular in this region.

Dietary Supplements

There is widespread distrust and uncertainty (what they include and how)
The priority of companies to increase sales also appears as a negative factor

- Other than herbal tea, which is universally drunk, vitamin C is the most used supplement with nearly half taking this either regularly or every now and then. The only countries with relatively lower uptake of vitamin C (less than 40% are Croatia and Turkey.
- Magnesium is taken by about one in three in Poland, Russia and about 1 in 4 in and Brazil. However it is not taken by none in Greece and very few in Turkey and Croatia. There is a similar pattern for vitamin D.
- German, Brazilian and Polish participants amongst the highest users of vitamins and minerals. taking on average three supplements regularly
- Lower usage of supplements in Greece and Croatia.

I use them….

1. **Only when needed** (illness, prevention in winter)
2. **Taking them regularly is necessary,** not everything can be provided with food
3. **Not necessary** as everything can be supplemented with food

Mixed views on usage

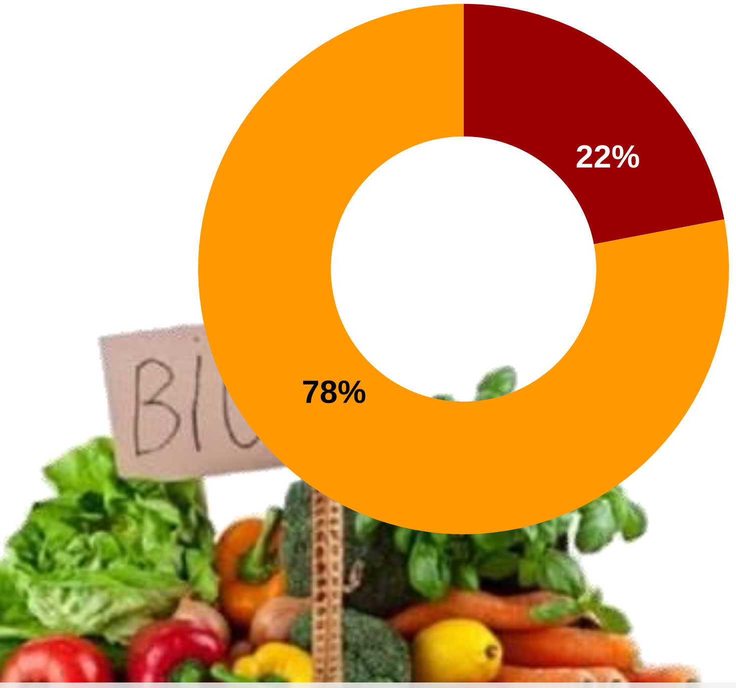
- Only 15-20% absorbed, so better to eat a balanced diet
- 'you can't replace food with vitamins'

UK	Believe it is better to eat a balanced diet. Vitamins C and D are the most popular, but supplements are only used when they're necessary.
Poland	Are not believed to counteract an unhealthy lifestyle. No single supplement used regularly by more than half the participants. Vitamin D and herbal teas are most popular.
Germany	Multivitamins the most popular form of dietary supplement. Do not believe dietary supplements can compensate for an unhealthy diet. Aren't viewed as necessary for good health.
Greece	Multivitamins are most popular in this region. Ability to purchase dietary supplements at supermarkets makes them more likely to use them, as they become more convenient to use.
Russia	Mostly only use supplements when they're necessary. Multivitamins and herbal teas are most popular, but over half of the participants temporarily use Vitamin C for medical reasons.
Croatia	Not as popular in Croatia as other regions, herbal teas most popular, mostly only used when needed for health reasons as opposed to regular use.
Turkey	Herbal teas are most popular in this region, especially among female participants. Other supplements not as popular, and only used as needed.
Hungary	Women viewed as responsible for purchasing these products. Vitamin C and D are most popular in this region.
Brazil	Most participants do not use supplements, feel they don't replace a healthy diet. However, feel they are useful for those with restricted diets or special medical requirements.

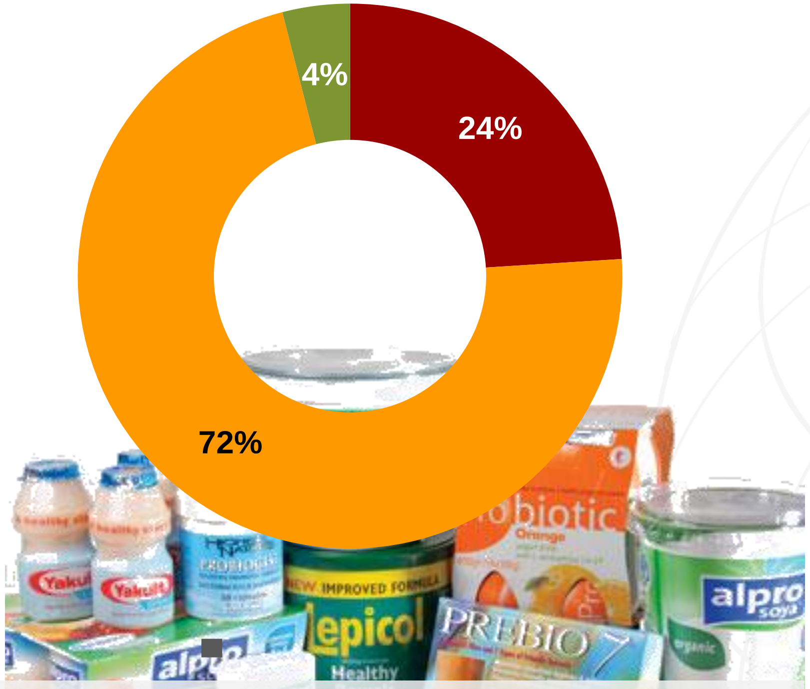
Taste or health benefit?

When looking for Bio/organic and functional foods consumers the main focus is on the health benefit rather than the taste

What would be most important for you if you were looking for **Bio/organic products?**



What would be most important for you if you were looking for **functional foods**?



- **The feeling of pleasure in eating these products**
- **The feeling that buying these products is reasonable and good for health**
- **I don't know**

UK	The main focus is on the health benefit. If anything participants associate organic foods with tastes that are more subtle / less strong
Poland	Consumed almost entirely for health reasons, as opposed to taste or other reasons.
Germany	Consumed for health preservation and taste rather than function, typically purchase alongside other regular purchases.
Greece	Just over three quarter consume bio/organic products primarily for health reasons. No participants bought these products as a result of media awareness campaigns.
Russia	Consumed mostly for health reasons, although bio-products were more likely to be purchased for taste reasons.
Croatia	Mostly consumed for health reasons, although a greater proportion of participants choose these products for taste relative to other regions.
Turkey	Almost 90% of participants would prioritise health benefits when choosing bio/organic products.
Hungary	Consumed almost entirely for health reasons, with only a few participants choosing these products for taste.
Brazil	Health is the most important factor when choosing bio or functional products, however, 40% of participants choose functional products for taste, more than in other regions.

NB: Findings are indicative based on 209 participants in total

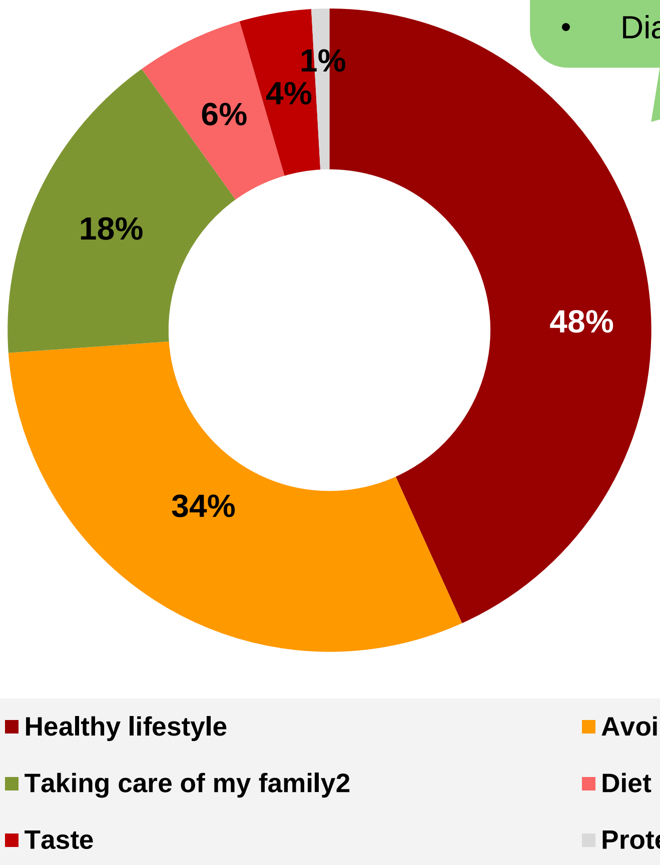
Shopping and Places

Main Reason for Healthy Shopping

Across all countries, the main focus was on reducing health risks for themselves and their children in the future

The three big health concerns are:

- Cancer
- Heart Disease
- Diabetes



Concerns:
There are harmful substances in products purchased and considered healthy

UK – Main focus is on reducing healthy risks for themselves and their family. Main health concerns are cancer and heart disease.

Poland – Family health is the most important driver for healthy shopping. Trying to avoid additives/preservatives is also a common reason.

Germany – Wanting to live a healthy lifestyle is overwhelmingly the most popular reason for healthy shopping.

Greece – Desire for a healthy lifestyle main reason for healthy shopping. Believe brands and products should lead the healthy food trend.

Russia – Wanting to take care of family and a general desire to live a healthy lifestyle are the most popular reasons for healthy shopping.

Croatia – Half of the participants choose healthy shopping out of a desire for a healthy lifestyle. Main concern is a fear of developing illness, especially in participant’s children.

Turkey – A desire for a healthy lifestyle is the most popular reason for healthy shopping. participants also cite concerns about the authenticity of products, which they fear could contain harmful substances.

Hungary – A desire to live a healthy lifestyle, and ensure family health are the most popular reasons for healthy shopping. Some participants were also concerned about harmful substances in their food.

Brazil – Desire to lead a healthy lifestyle drives healthy shopping habits. Concerns are not getting enough vitamins and nutrients in their diet, as well as a risk of contamination or consuming harmful substances.

NB: Findings are indicative based on 209 participants in total

Places for Buying Healthy Food

The main supermarkets are seen as having the widest range of healthy foods, although there is some compromise on quality in some stores relative to farmer's markets etc.

	Supermarkets and Hypermarkets	Smaller / discount stores	Local specialist stores (e.g. butcher	Markets / farmers markets	Health food / organic stores
Advantages	• Widest product range including bio/organic foods • Discounts • Cheaper products	• More affordable • Some bio/organic foods available	• Quality • Provenance • Reliability	• Credibility on bio/organic • Freshness	• Quality healthy products • Wider range of healthy foods
Disadvantages	• Variable quality of fresh produce (fruits, vegetables, meat) – depending on Brand	• Low quality of fresh products (vegetable, fruits, meat)	• Expensive	• Expensive • Not always trusted (source etc.)	• Expensive • Smaller quantities – extras, not 'meals'
Frequency	• Variable, but less frequent	• Few times a week	• Weekly	• Occasional	• As needed
Products	• Focus on bulk purchase and non-perishable foods	• Focus on staples: vegetables, fruits, dairy, meat	• Meat, Fish, Bread	• Fruit and veg • Meats • Specialist / organic foods	• Organic foods • Supplements

UK Supermarkets are viewed as having the widest range of healthy food, although quality is better at specialist shops. Most healthy food purchased during weekly shop.

Poland Avoiding unhealthy food is the key to avoiding obesity. Both men and women want to lose weight, and most participants are on a diet or planning to start one.

Germany Purchasing of bio-products not closely related to where they are shopping. Tend to mostly use supermarkets for their shopping.

Greece Lack of time for shopping leads to preference for shopping in one place, with preference for supermarkets and local markets. Shopping for healthy products not limited to one place however.

Russia Consumers use different shops for different products rather than buying everything in one place. Prefer to use specialist stores for healthy food, and supermarkets for non-perishable goods.

Croatia Different products purchased in different places, markets and local shops used for health foods, even though prices are higher than hyper/supermarkets.

Turkey Typically do all of their shopping in one place, for reliability and consistent prices. Markets preferred, as freshness is guaranteed, and they can choose specific products.

Hungary Majority of shopping done at hyper/supermarkets. Accepting of slightly lower quality of fresh products for a broader range and better offers/prices.

Brazil Non-perishable goods bought at supermarkets. Fresh foods purchased at markets and greengrocers. 80-90% feel that their weekly purchases are healthy. Fresh food often felt to be more expensive.

Price and Buying Healthy Food

Healthy food is always expensive. On the one hand this is expected and discounting is viewed with suspicion, but on the other premium pricing is a barrier to purchase. Extreme variability of pricing between brands and store is a further source of scepticism.

Healthy food

Overall, participants are willing to pay a premium of 10% or 20% for foods when they have good reason to believe it is healthier. But they are not prepared to pay double

They expect certification and other guarantees of quality, but are not prepared to pay much extra for this.

Price

UK: Healthy food more expensive, so participants look out for offers, but feel that unhealthy foods have better offers and are better positioned/advertised.

Poland: Participants are willing to pay a bit more for healthy food, but would be discouraged by prices three to four times higher. However, healthy food is not strongly associated with higher prices in this region.

Germany: participants willing to pay more for healthier food, up to around 20-30% more, in particular, meat was the product that was least price elastic for consumers.

Greece: Healthy food viewed as expensive, participants seek specific products and outlets to best meet their needs. Supermarkets and bio-shops are market leaders.

Russia: Healthy food more expensive, but this is expected, and participants would be suspicious of a low price good claiming to be of a high quality.

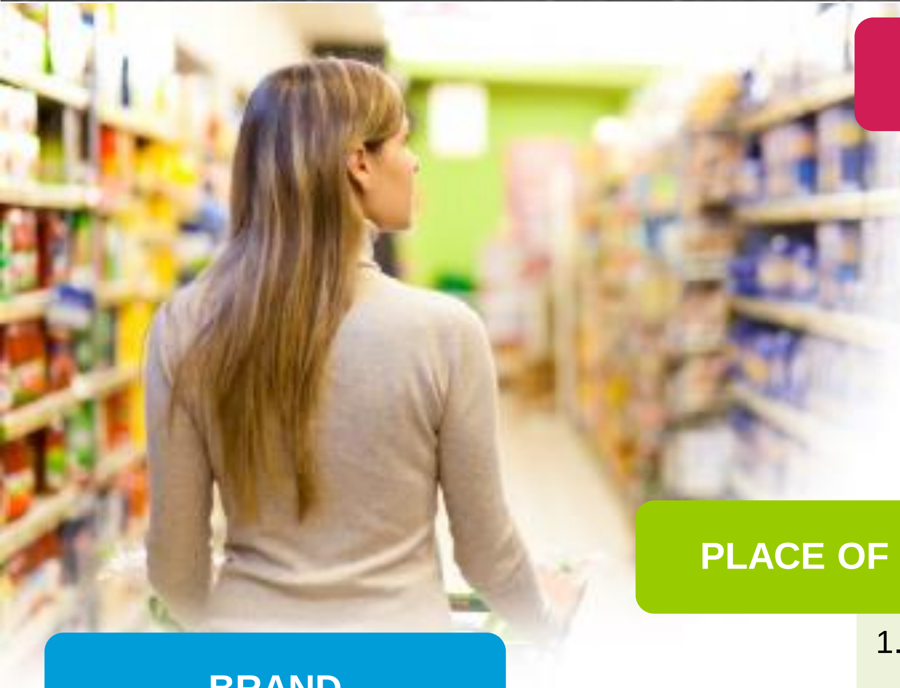
Croatia: Specialist stores and high quality goods expected to cost more. participants are willing to pay approximately a 30% premium for healthy products.

Turkey: Willing to pay more for healthy food, but feel the price gap shouldn't be too big. Likely to buy smaller quantities of healthy food if it's too expensive.

Hungary: Healthy food 'always expensive', participants as a result are particularly drawn to discounts and special offers but willing to pay more, especially for the 'healthiest' products.

Brazil: Willing to pay 10-20% more for healthy food, and believe that healthy food is always more expensive, as it is a niche market, but competition between brands lead to discounts.

Other aspects of purchase healthy food



ONLINE SHOPPING

Considerable variance by market as not all are used to online food shopping.

In UK, Poland and Germany, where this is more mainstream, there are still concerns over fresh produce and meats where personal selection is more of a guarantee of quality.

PLACE OF ORIGIN

1. Buying national produce regarded as important, particularly for larger producer countries where imported food is regarded with suspicion (Russia, Germany, Greece) and where they want to support local farmers.
2. This said, quality and price are key considerations that can weigh against this.

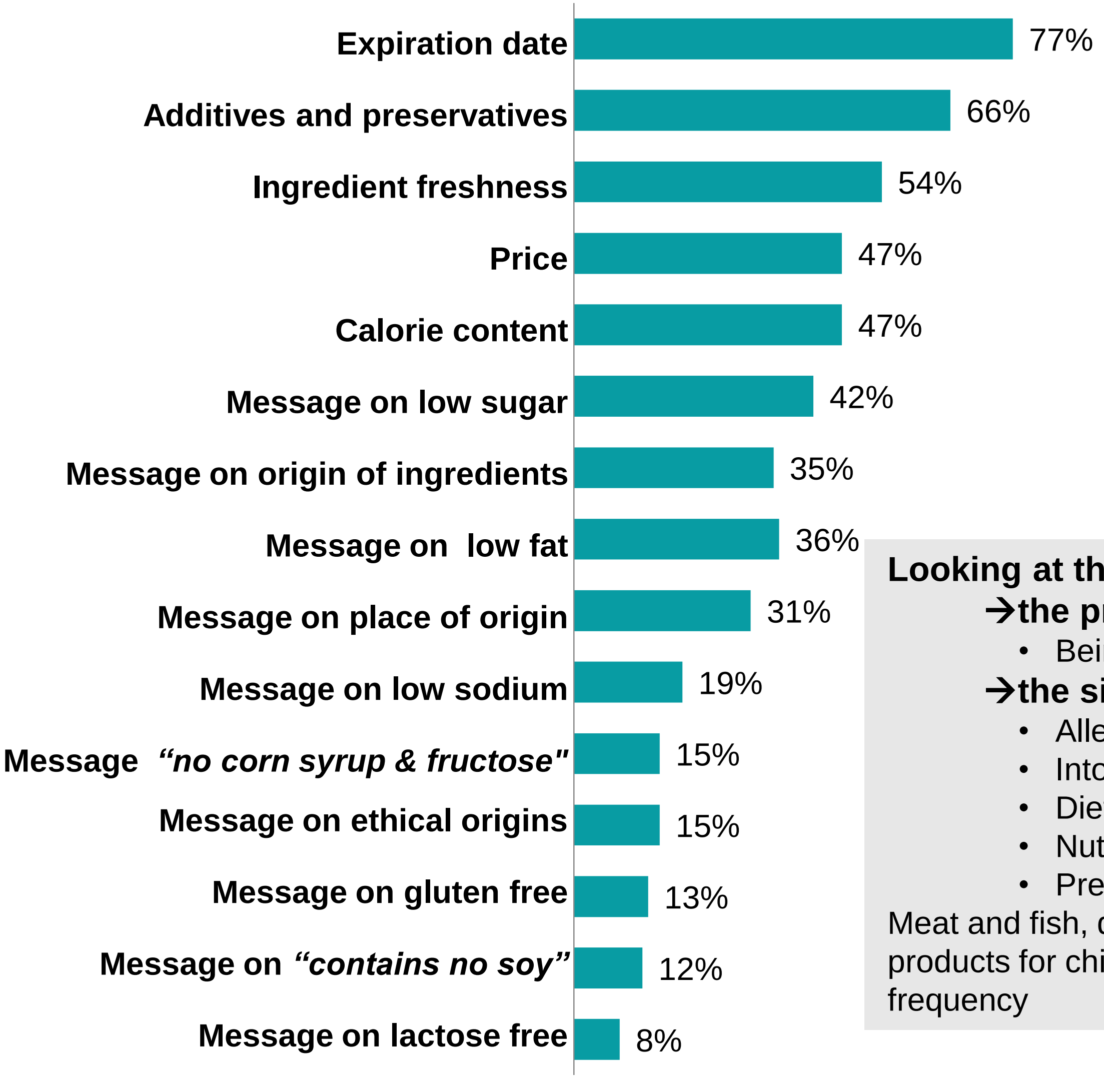
BRAND

Greater loyalty towards specific products than brands
Participants in all countries say they don't care much about brands, but camera shots of their fridges suggest they do!
New products expected to have discounts and promotions (particularly in supermarkets / hypermarkets).

UK	Consumers prefer to shop for healthy food in person to ensure freshness. 'Local' is preferred to 'British'. Brands important for 'treat' products. More brand loyal than they would like to admit.
Poland	Some use of online vendors, feel there is more variety and better prices online. Majority feel brands aren't that important. Local produce preferred due to better quality.
Germany	Prefer domestically produced products due to negative perceptions of foreign goods. Little to no brand preference. Some buy online for convenience, but some distrust for online vendors.
Greece	Don't believe online shopping suitable for food purchases. Prefer Greek products, as they are believed to be of a higher quality. Brand loyal, but this will disappear if other goods are discounted.
Russia	Not much experience of online shopping due to concerns over ensuring freshness and quality. Tend to be brand loyal, and will try new products if they are from a brand they trust.
Croatia	Not experienced with online shopping, believe it's not suitable for food shopping. Prefer domestic goods to foreign ones, but if price and quality are good, will use foreign goods.
Turkey	Not much use of online vendors due to a lack of trust, but some would purchase non-perishable goods online. Brand loyalty is important.
Hungary	Dismissive of online purchasing due to a lack of awareness of online vendors, and lack of physical interaction with product. More likely to be brand loyal, even to own-brand goods.
Brazil	Not brand loyal, quality is most important. No experience with online shopping, as shipping costs will make it more expensive. Some find place of origin important, others don't care.

Healthy Food as an Own Label

What do you look for on package labels?



Looking at the label depends on:

→the product

- Being unfamiliar

→the situation

- Allergy
- Intolerance
- Diet
- Nutritional education
- Pregnancy

Meat and fish, dairy products and products for children checked with greater frequency

Germany **Greece**

More likely to look for low fat messages than participants from other countries

Germany **Russia** **Croatia** **Hungary**

Greater interest in origin of ingredients and place of origin than other countries

Turkey

Only country for which presence of corn syrup in products is a major issue of concern

NB: Findings are indicative based on 209 participants in total

Responsibilities and goals in healthy living

Problems with Losing Weight (adults)

Obesity only regarded as a serious issue in some countries (UK, Germany, Croatia, Greece), but all see it as a matter of personal responsibility

WHO HAS RESPONSIBILITY?

1. **The people themselves**
2. Unhealthy product manufacturers – for using additives / sugar and creating addictive tastes
3. Excessive marketing of unhealthy foods (particularly those aimed at children)
4. The government for insufficient regulation

WHAT SHOULD I DO?

1. Moderation in food consumption
2. Less carbohydrates and fat
3. More fruits and vegetables
4. Less sweets and sugar
5. Decision: intention and will
6. Eat regularly
7. Eat quality food
8. Hydration

DO YOU WANT TO LOSE WEIGHT?

- In Poland, Hungary and UK, most want to lose weight (particularly women), but in other markets the majority of participants want to maintain their current weight

WHAT SHOULD I AVOID/MODERATE?

- Sugars
- Carbohydrates
- Fats (particularly saturated)
- Excessive salt

UK — Whilst there is a perception that marketing and unhealthy foods exacerbate the obesity epidemic, the only real solution is personal responsibility.

Poland — Avoiding unhealthy food is the key to avoiding obesity. Both men and women want to lose weight, and most participants are on a diet or planning to start one.

Germany — Most participants happy with their current weight. Moderation in food consumption and staying active are important to losing weight. Sugars and fats key foods to avoid.

Greece — Food companies blamed for obesity, and participants feel that they should produce healthier food. Feel that Spring/Summer are a driver to lose weight.

Russia — Individual viewed as responsible for their own weight. Willpower viewed as the most important part of dieting. Avoiding weight gain favored over losing weight.

Croatia — A diverse diet is viewed as important to good health. participants more focused on maintaining current weight than losing weight. No foods to avoid, but believe in moderation.

Turkey — Avoiding unhealthy foods (salt/sugar) key to losing weight, and to be avoided generally. More men than women happy with their current weight.

Hungary — Most participants on a diet or planning one. More women than men want to lose weight. Moderation and avoiding carbs/sugar key to losing weight

Brazil — Around half of participants at least monitor their weight, but only seven (2 men, 5 women) looking to lose weight, mainly by reducing intake of fats

Low or 0-Calorie Sweeteners

Very negative perceptions towards low calorie sweeteners in all markets, although some usage of stevia and xylitol which are regarded as more natural.

DISMISSIVE

- They think the 0 calorie sweeteners are unhealthy and have a strange aftertaste
- They make you feel lethargic
- They make you crave sweet foods

Particularly negative reaction against diet drinks – seen as unhealthy / less healthy than full fat versions. But for some, these are a 'guilty pleasure'

NATURAL – BUT LESS

- Preference for eating unrefined sugars (or honey etc.) in smaller quantities

UK	Largely negative perception, 'diet' options of food/drink viewed as less healthy than 'full fat' versions. Prefer sugar, but in smaller quantities.
Poland	Sweeteners viewed as 'unhealthy' as they are chemical. Sweeteners only used for tea/coffee and occasionally soft drinks.
Germany	Almost everyone has a bad view of artificial sweeteners. No regular users among participants, and sweeteners viewed as unhealthy and tasting strange.
Greece	Wary of artificial sweeteners due to their being chemical based. Prefer to limit sugar consumption to an occasional treat rather than use artificial sweeteners.
Russia	Artificial Sweeteners harshly rejected by participants, would rather consume less or no sugar than use artificial sweeteners.
Croatia	No participants regular users of sweeteners, as they are viewed as unhealthy. Natural replacements for white sugar (Stevia etc.) preferred.
Turkey	Almost all participants oppose artificial sweeteners, but also tend not to consume white sugar, preferring natural alternatives such as honey or sugar beet.
Hungary	Opinions vary and tend towards extremes. Mostly used for teas/coffees rather than cooking, seen as a good alternative to white sugar.
Brazil	Not as dismissive as other regions, refuse artificial sweeteners as they dislike the taste rather than for health reasons. Some mix sweeteners with sugars.

Children's Healthy Eating

The main focus is on providing good examples for children and ensuring that they eat healthily and only enjoy sweets and fast food in moderation.

Responsibilities

1. Parents and relatives
2. Schools / the state

Important to include

- Healthy, varied, delicious food
- Balanced diet

- **Avoid:**
  - Artificial colourings and preservatives
  - Ready made juices
  - High sodium cereals
  - Salt
  - (White) sugar
  - Processed foods

Concerns

- External influences on school-age children
  - Low quality, unhealthy food at school
  - Media influences / fast food
- Higher risk of obesity and allergies
- Longer term concerns about impact of agro chemicals on behaviours, physical and mental health

Tricks

- Hiding healthier ingredients in sauces and with pasta
- Make food look appealing / fun
- Make the effort and cook at home with fresh ingredients
- Lead by example: eat healthily yourself and eat with the children / family

UK Parents and schools responsible. Important to 'start young' with healthy eating. Allow occasional unhealthy treats as 'bribes' for healthy eating.

Poland Mixing healthy food with unhealthy 'treats' viewed as a good way to encourage healthy eating. Teenagers viewed as easier to make eat healthy as they care about their appearance more.

Germany Believe parents are primarily responsible for children's food choices, schools also viewed as responsible. Concerned about external influences on children. Nice serving used for healthy foods.

Greece Women primarily responsible for children's diet. Nice serving and a varied diet are key, as is avoiding certain unhealthy foods.

Russia Women responsible for cooking, however, men are responsible for buying food for the family. 'Hiding' healthy food in treats is popular, but participants believe that conditioning is also needed.

Croatia Women cook more, and are viewed as more 'creative' when tricking children into eating healthy. Concerned about media portrayal of unhealthy food. Parents held responsible.

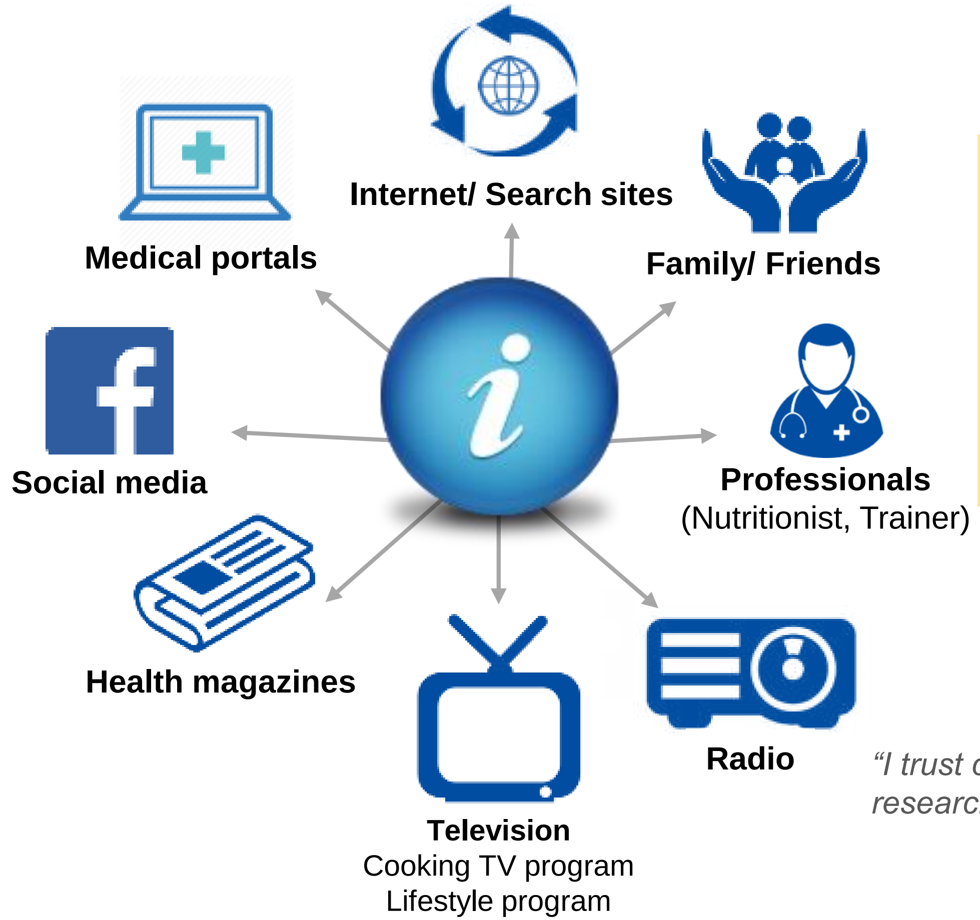
Turkey Obesity a major concern for parents, as well as external influences on children. Nice serving a popular option, as well as 'conditioning' children to enjoy healthier food.

Hungary Women cook more than men. Parents and schools responsible. External influences a concern. Nice serving and tasty food favored ways to eat healthy.

Brazil Parents are primarily responsible for children's health. Concerned about obesity and children not getting enough nutrients to grow properly.

Main Information Sources

Credibility is not determined by the channel of information but by who it comes from.
It is considered to be credible if it is based on experience and comes from an acknowledged expert.
Difficult to filter relevant information: there are always opinions for and against.



Opinion leaders

- **Doctors / medical profession –** including those who appear on TV
- **Athletes, trainers and coaches**
- **Nutritionists–** including authors of diet books and those marketing health products

"I trust confirmed medical research. I prefer newer research." (Vesna, Croatia)

Opinion Leaders

UK	National Health Service website. Celebrity chefs such as Jamie Oliver. Body coaches such as Joe Wicks
Poland	Anna Lewandowska, fitness and diet trainer. Ewa Chodakowska - fitness trainer, athlete. Katarzyna Bosacka - TV presenter with own TV show
Germany	No individuals cited in Germany. Doctors, nutritionists, fitness specialists and bloggers all cited as trusted sources
Greece	Eleni Petroulaki, trainer, yoga master. Michalis Kefaloyiannis, broadcaster amongst the individuals mentioned. Sportsmen such as Ronaldo and Zidane also mentioned.
Russia	Elena Malsheva, talk-show hostess and doctor. Evgeny Komarovsky, pediatrician.
Croatia	No individuals mentioned in Croatia, but overall doctors, nutritionists and coaches are trusted sources
Turkey	Canan Efendigil Karatay, author of a diet book. Yavuz Dizdar, oncologist and activist on processed foods. Feridun Kunak, TV presenter and doctor.
Hungary	Norbi Schobert, businessman. Alexandra Beres, fitness trainer. Judit Stahl, TV presenter. Gabor Szendi, psychologist.
Brazil	Dr Lair Ribeiro, cardiologist and nutrition specialist. Lucilia Diniz, business woman specialising in health products.

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