HEALTHY EATING RESEARCH

AN ONLINE COMMUNITY RESEARCH PROJECT

GLOBAL REPORT

July 2017
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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
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.
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.
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.
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)
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)
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

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...

<table>
<thead>
<tr>
<th>Physical</th>
<th>Feeling good...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy</td>
<td>Mental /</td>
</tr>
<tr>
<td>Feeling light and lively</td>
<td>Emotional</td>
</tr>
<tr>
<td>Feeling sluggish and tired</td>
<td>Feeling bad...</td>
</tr>
<tr>
<td>Feeling lethargic</td>
<td>Feeling bad...</td>
</tr>
<tr>
<td>Feeling bloated</td>
<td>Feeling sluggish and tired</td>
</tr>
<tr>
<td>Feeling bloated</td>
<td>Feeling lethargic</td>
</tr>
<tr>
<td>Craving carbohydrates</td>
<td>Feeling sluggish and tired</td>
</tr>
<tr>
<td>Headaches</td>
<td></td>
</tr>
</tbody>
</table>

### What leads to these feelings?

- Good hydration
- Taking vitamins and nutritional supplements, particularly in the winter (Vitamin C, Vitamin D, Multivitamin)
- Exercise
- Relating (music, meeting friends, time with family)

### 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

## Feeling bad...

<table>
<thead>
<tr>
<th>Physical</th>
<th>Feeling bad...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not feeling bloated</td>
<td>Feeling sluggish and tired</td>
</tr>
<tr>
<td>Ready for exercise</td>
<td>Feeling lethargic</td>
</tr>
<tr>
<td>Lots of energy</td>
<td>Feeling bloated</td>
</tr>
<tr>
<td>Skin is fresh and glowing</td>
<td>Craving carbohydrates</td>
</tr>
<tr>
<td>Headaches</td>
<td>Moodiness / irritation</td>
</tr>
</tbody>
</table>

### Mental / Emotional

- Feeling light and lively
- Better mental skills
- Happy and cheerful
- Able to think clearly

### What leads to these feelings?

- 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

"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)

"German participants mention lack of motivation and laziness as symptoms of feeling bad – leading to making more mistakes and having difficulty concentrating." (Efi, 39)

"All sensations are pumping and I am smiling." (Efi, 39)

"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." (Efi, 39)

"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)

"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)

"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)

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

- 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).

- 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?

- **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.

- 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!

- **Coffee** in the UK is more commonly consumed than **coffee**, which is regarded as a stimulant.

- 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?

<table>
<thead>
<tr>
<th>Country</th>
<th>Butter</th>
<th>Margarine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Croatia</td>
<td>17%</td>
<td>0%</td>
</tr>
<tr>
<td>Germany</td>
<td>31%</td>
<td>6%</td>
</tr>
<tr>
<td>Greece</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>Hungary</td>
<td>48%</td>
<td>24%</td>
</tr>
<tr>
<td>Poland</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>Russia</td>
<td>57%</td>
<td>0%</td>
</tr>
<tr>
<td>Turkey</td>
<td>63%</td>
<td>8%</td>
</tr>
<tr>
<td>UK</td>
<td>30%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Greek participants are the most frequent consumers of margarine.

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

Polish and Greek participants are the biggest butter consumers.

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.

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

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

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.

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

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.

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

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

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.

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

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

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.

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.

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

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?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of access to healthy food</td>
<td>40%</td>
</tr>
<tr>
<td>Lack of time to prepare food</td>
<td>40%</td>
</tr>
<tr>
<td>Lack of time for shopping</td>
<td>33%</td>
</tr>
<tr>
<td>Temptation of unhealthy food</td>
<td>33%</td>
</tr>
<tr>
<td>Contradictory information on healthy food</td>
<td>24%</td>
</tr>
<tr>
<td>Lack of knowledge about healthy food</td>
<td>19%</td>
</tr>
<tr>
<td>Lack of support from family members</td>
<td>16%</td>
</tr>
<tr>
<td>Compromising between healthy and unhealthy food</td>
<td>13%</td>
</tr>
<tr>
<td>Cost</td>
<td>71%</td>
</tr>
</tbody>
</table>

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

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

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.

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

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.

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.

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.

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.

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

<table>
<thead>
<tr>
<th>Healthy food and drinks</th>
<th>Unhealthy food and drinks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food</strong></td>
<td></td>
</tr>
<tr>
<td>‘Quality foods’ – fresh, locally sourced, well grown</td>
<td>Fast food</td>
</tr>
<tr>
<td>Vegetables, salads and fruits</td>
<td>Chocolate and sweets</td>
</tr>
<tr>
<td>Whole grain products, oatmeal</td>
<td>Crisps</td>
</tr>
<tr>
<td>Dairy products (milk, cheese, yogurt) – for some</td>
<td>Processed food (frozen foods, fast food)</td>
</tr>
<tr>
<td>Home cooking</td>
<td>Biscuits</td>
</tr>
<tr>
<td></td>
<td>Cereals high in sugar</td>
</tr>
<tr>
<td><strong>Drinks</strong></td>
<td></td>
</tr>
<tr>
<td>Mineral water, tap water</td>
<td>Carbonated drinks (full fat)</td>
</tr>
<tr>
<td>Juices</td>
<td>Diet carbonated drinks</td>
</tr>
<tr>
<td></td>
<td>Alcohol</td>
</tr>
<tr>
<td><strong>Motivation</strong></td>
<td></td>
</tr>
<tr>
<td>Lots of attention to family health</td>
<td>Lack of time / convenience</td>
</tr>
<tr>
<td>...natural ingredients, balance, variety and home made cooking</td>
<td>Temptation</td>
</tr>
<tr>
<td>Unhealthy food is permissible, but it is important to be moderate</td>
<td></td>
</tr>
</tbody>
</table>

**UK**
- 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.
- Try to have a good variety of food, eating unhealthy food a few times a month is viewed as acceptable.
- Food companies blamed for obesity, and participants feel that they should produce healthier food. Feel that Spring/Summer are a driver to lose weight.
- 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.
- 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.
- Healthy food eaten to stay healthy and avoid sickness, while unhealthy food is eaten rarely, or in the absence of alternatives.
- Unhealthy food is viewed as permissible, but moderation is important. Vitamins and nutrients are key to healthy food. Eating healthy necessary to avoid illness.
- Although unhealthy food typically ‘tastes better’, participants choose healthy food options based on taste and enjoyment. Unhealthy food viewed as faster and more convenient.

**Poland**
- "Quality foods" are a key source of healthy food.
- Lots of attention to family health
- Natural ingredients, balance, variety and home made cooking

**Germany**
- 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.
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**Greece**
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**Turkey**
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- Unhealthy food is viewed as permissible, but moderation is important. Vitamins and nutrients are key to healthy food. Eating healthy necessary to avoid illness.
- Although unhealthy food typically ‘tastes better’, participants choose healthy food options based on taste and enjoyment. Unhealthy food viewed as faster and more convenient.

**Hungary**
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- Healthy food eaten to stay healthy and avoid sickness, while unhealthy food is eaten rarely, or in the absence of alternatives.
- Unhealthy food is viewed as permissible, but moderation is important. Vitamins and nutrients are key to healthy food. Eating healthy necessary to avoid illness.
- 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

**Vegetables**
- Brazil: 100%
- Croatia: 83%
- Germany: 97%
- Greece: 100%
- Hungary: 100%
- Poland: 100%
- Russia: 95%
- Turkey: 92%
- UK: 93%

**Fruit**
- Brazil: 95%
- Croatia: 83%
- Germany: 100%
- Greece: 100%
- Hungary: 100%
- Poland: 95%
- Russia: 95%
- Turkey: 88%
- UK: 67%

**Fish**
- Brazil: 100%
- Croatia: 75%
- Germany: 84%
- Greece: 74%
- Hungary: 100%
- Poland: 100%
- Russia: 95%
- Turkey: 100%
- UK: 80%

**Yoghurt**
- Brazil: 70%
- Croatia: 63%
- Germany: 81%
- Greece: 74%
- Hungary: 100%
- Poland: 100%
- Russia: 95%
- Turkey: 96%
- UK: 70%

**Olive Oil**
- Brazil: 75%
- Croatia: 71%
- Germany: 72%
- Greece: 78%
- Hungary: 95%
- Poland: 90%
- Russia: 95%
- Turkey: 96%
- UK: 43%

NB: Findings are indicative based on 209 participants in total.
Top 10 healthiest foods: 2/2

<table>
<thead>
<tr>
<th></th>
<th>Eggs</th>
<th>Wholemeal Bread</th>
<th>Nuts</th>
<th>Fruit Juice</th>
<th>Poultry</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Brazil</td>
<td>70%</td>
<td>50%</td>
<td>100%</td>
<td>67%</td>
</tr>
<tr>
<td>7</td>
<td>Croatia</td>
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<td>58%</td>
<td>75%</td>
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</tr>
<tr>
<td>8</td>
<td>Germany</td>
<td>66%</td>
<td>56%</td>
<td>56%</td>
<td>66%</td>
</tr>
<tr>
<td>9</td>
<td>Greece</td>
<td>52%</td>
<td>57%</td>
<td>48%</td>
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</tr>
<tr>
<td>10</td>
<td>Hungary</td>
<td>76%</td>
<td>90%</td>
<td>90%</td>
<td>71%</td>
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<tr>
<td></td>
<td>Poland</td>
<td>80%</td>
<td>90%</td>
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<td>81%</td>
</tr>
<tr>
<td></td>
<td>Russia</td>
<td>81%</td>
<td>90%</td>
<td>52%</td>
<td>50%</td>
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<tr>
<td></td>
<td>Turkey</td>
<td>96%</td>
<td>79%</td>
<td>71%</td>
<td>63%</td>
</tr>
<tr>
<td></td>
<td>UK</td>
<td>83%</td>
<td>63%</td>
<td>73%</td>
<td>67%</td>
</tr>
</tbody>
</table>

NB: Findings are indicative based on 209 participants in total
Top 10 unhealthy foods: 1/2

1. Brazil 95% Savoury Snacks
2. Croatia 71% Processed Food
3. Germany 78% Cakes & Pastries
4. Greece 83% Ice cream
5. Hungary 86%

Poland 90%
Turkey 90%
Reasons for the percentages:

NB: Findings are indicative based on 209 participants in total
Top 10 unhealthy foods: 2/2

<table>
<thead>
<tr>
<th>Country</th>
<th>Margarine</th>
<th>Cold cuts</th>
<th>Low calorie sweetener</th>
<th>Chocolate</th>
<th>Sugar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>80%</td>
<td>45%</td>
<td>20%</td>
<td>55%</td>
<td>40%</td>
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<tr>
<td>Croatia</td>
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<td>67%</td>
<td>38%</td>
<td>29%</td>
<td>29%</td>
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<tr>
<td>Germany</td>
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<td>56%</td>
<td>47%</td>
<td>19%</td>
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<tr>
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<td>13%</td>
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<tr>
<td>Hungary</td>
<td>62%</td>
<td>62%</td>
<td>70%</td>
<td>67%</td>
<td>10%</td>
</tr>
<tr>
<td>Poland</td>
<td>55%</td>
<td>35%</td>
<td>29%</td>
<td>43%</td>
<td>25%</td>
</tr>
<tr>
<td>Russia</td>
<td>86%</td>
<td>52%</td>
<td>29%</td>
<td>33%</td>
<td>0%</td>
</tr>
<tr>
<td>Turkey</td>
<td>58%</td>
<td>58%</td>
<td>42%</td>
<td>46%</td>
<td>30%</td>
</tr>
<tr>
<td>UK</td>
<td>50%</td>
<td>13%</td>
<td>20%</td>
<td>60%</td>
<td></td>
</tr>
</tbody>
</table>

NB: Findings are indicative based on 209 participants in total.
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.

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

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 it 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)

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

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

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. 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.

Most 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.

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.
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 healthiest than Brazilian food. Other nations rated their own cuisine less 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.

**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.

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.

Italian food considered healthiest cuisine. Germany’s own cuisine is considered fairly unhealthy. Mixed attitudes towards Asian cuisines, Japanese food considered healthy though.

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

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.

Chinese food considered the healthiest cuisine with Japanese food also rated highly. Vegetarian and American cuisines were considered less healthy.

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.

Hungarian cuisine is viewed as one of the most unhealthy. Asian cuisines considered healthy, as is Greek cuisine.

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’

- 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.
- 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’.
- Unhealthy eating tends to be at social events/ special occasions. Tend to also eat unhealthy at weekends, as a break for their diet in the week. Price of healthy food/lack of time drive unhealthy behaviour.
- 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.
- 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.
- 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.
- 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.
- Unhealthy food eaten at social or special occasions, or if there are no alternatives available.
- 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.
None of the fast food brands regarded as having a healthy image. McDonalds felt to be trying, but not succeeding.

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.

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.

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’!

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.

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.

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.

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.

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

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

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

Struggled to define precisely what organic food meant. Term associated with simple packaging and a lack of ‘unnatural’ and ‘artificial’ ingredients.

Bio/organic products viewed as more natural/traditional. Also, some reputation for less attractive products/packaging.

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.

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.

Not able to differentiate. Terms viewed as synonymous. Natural ingredients and higher quality assumed, as is higher price.

Can’t differentiate between terms, but all three terms were associated with healthier, more nutritious food and a better taste.

Little differentiation between terms. Associated with a better quality of product, as well as seasonal and natural productions.

Mixed notions, participants had trouble differentiating terms. Greatest knowledge about ‘bio’ products. Assumed to be chemical-free. Higher price/quality expected.

participants couldn’t distinguish between the various products very well. participants generally accepting of a higher price for these products, associated with “healthy food”.

Poland
- Germany
- UK
- Russia
- Turkey
- Greece
- Croatia
- Hungary
- Brazil
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)
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).

**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)
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

**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**
- 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**
- 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

**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

**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
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’

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.

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.

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.

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.

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.

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.

Herbal teas are most popular in this region, especially among female participants. Other supplements not as popular, and only used as needed.

Women viewed as responsible for purchasing these products. Vitamin C and D are most popular in this region.

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

The main focus is on the health benefit. If anything participants associate organic foods with tastes that are more subtle / less strong.

Consumed almost entirely for health reasons, as opposed to taste or other reasons.

Consumed for health preservation and taste rather than function, typically purchase alongside other regular purchases.

Consumed mostly for health reasons, although bio-products were more likely to be purchased for taste reasons.

Mostly consumed for health reasons, although a greater proportion of participants choose these products for taste relative to other regions.

Almost 90% of participants would prioritise health benefits when choosing bio/organic products.

Consumed almost entirely for health reasons, with only a few participants choosing these products for taste.

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.

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

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.

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

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

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

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

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

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.

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.

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.

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.

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

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.

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.

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

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.

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.

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

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.

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

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.
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.

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.

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

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.

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.

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

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.

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

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.

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.

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.
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.

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.

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).
Healthy Food as an Own Label

What do you look for on package labels?

- Expiration date: 77%
- Additives and preservatives: 66%
- Ingredient freshness: 54%
- Price: 47%
- Calorie content: 47%
- Message on low sugar: 42%
- Message on origin of ingredients: 35%
- Message on low fat: 36%
- Message on place of origin: 31%
- Message on low sodium: 19%
- Message “no corn syrup & fructose”: 15%
- Message on ethical origins: 15%
- Message on gluten free: 13%
- Message on “contains no soy”: 12%
- Message on lactose free: 8%

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

NB: Findings are indicative based on 209 participants in total.
Responsibilities and goals in healthy living
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

**WHAT SHOULD I AVOID/MODERATE?**

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

**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

**WHO HAS RESPONSIBILITY?**

- 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.
- 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.
- Food companies blamed for obesity, and participants feel that they should produce healthier food. Feel that Spring/Summer are a driver to lose weight.
- Individual viewed as responsible for their own weight. Willpower viewed as the most important part of dieting. Avoiding weight gain favored over losing weight.
- 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.
- Avoiding unhealthy foods (salt/sugar) key to losing weight, and to be avoided generally. More men than women happy with their current weight.
- 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.
- 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.

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

**NATURAL – BUT LESS**

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

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

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

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.

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.

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

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.

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.

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.

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

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)
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