

CCEP – NARTD Segmentation

Total Market | MAT August 2023

Consumer Panel Services GfK Belgium

Thomas Nauwelaerts
Karel de Ridder



1

Methodology



**With “Paint a Picture” we
analyze and describe shopper
targets from a full perspective,
linking information on lifestyle,
attitudes and preferences to
Consumer Panel purchase data.**

A clear picture of
your target group is
the prerequisite for
effective & efficient
targeting



Deepen the knowledge about your
targets & segments to meet their
needs - and overcome **barriers**



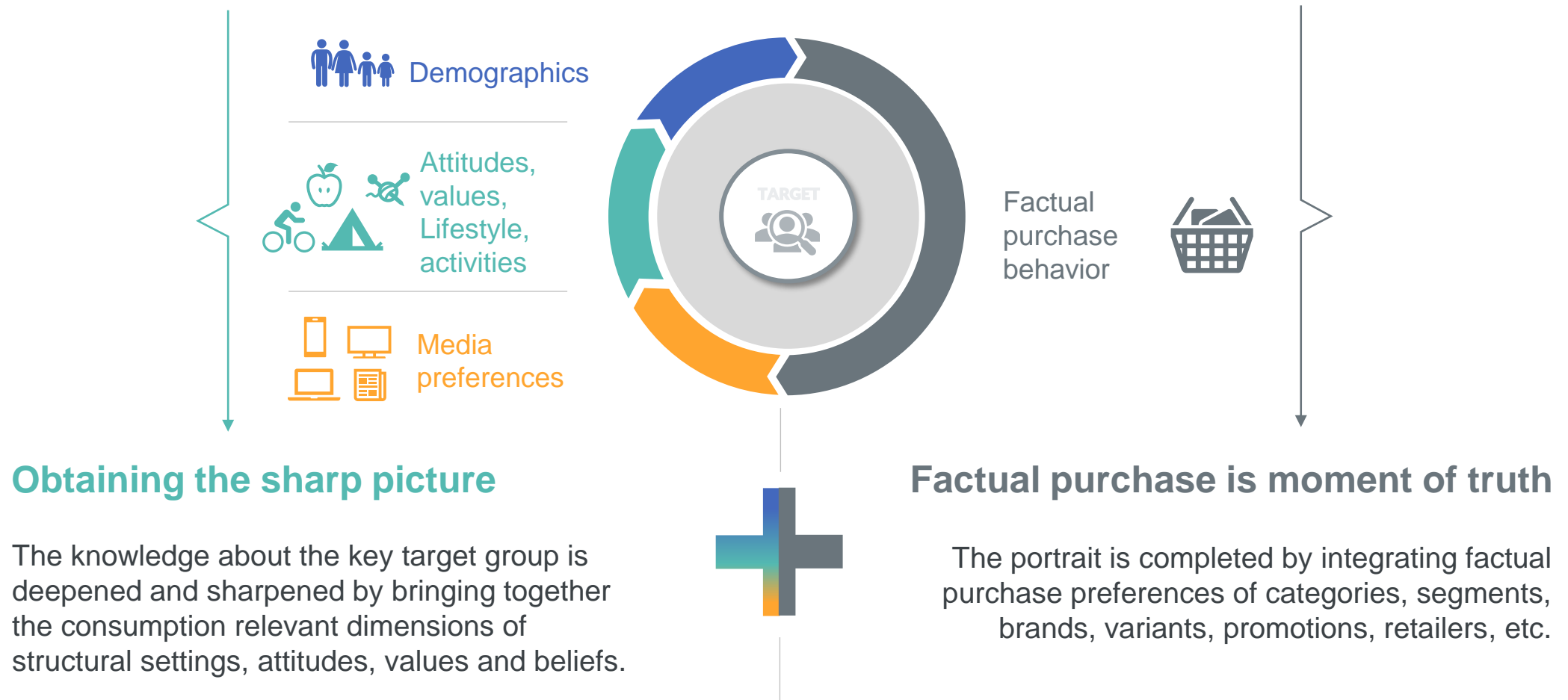
Benefit from 360° information of our
panelists on **structural circumstances**,
attitudes & values and **purchase behavior**



Compilation of thorough profiles as
basis for recommendations for your
marketing mix



Our Paint a Picture combines demographics, mindsets, media usage & factual purchase data from one single source



Paint a Picture chapters

PaP delivers holistic consumer profiles covering the following chapters:

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...

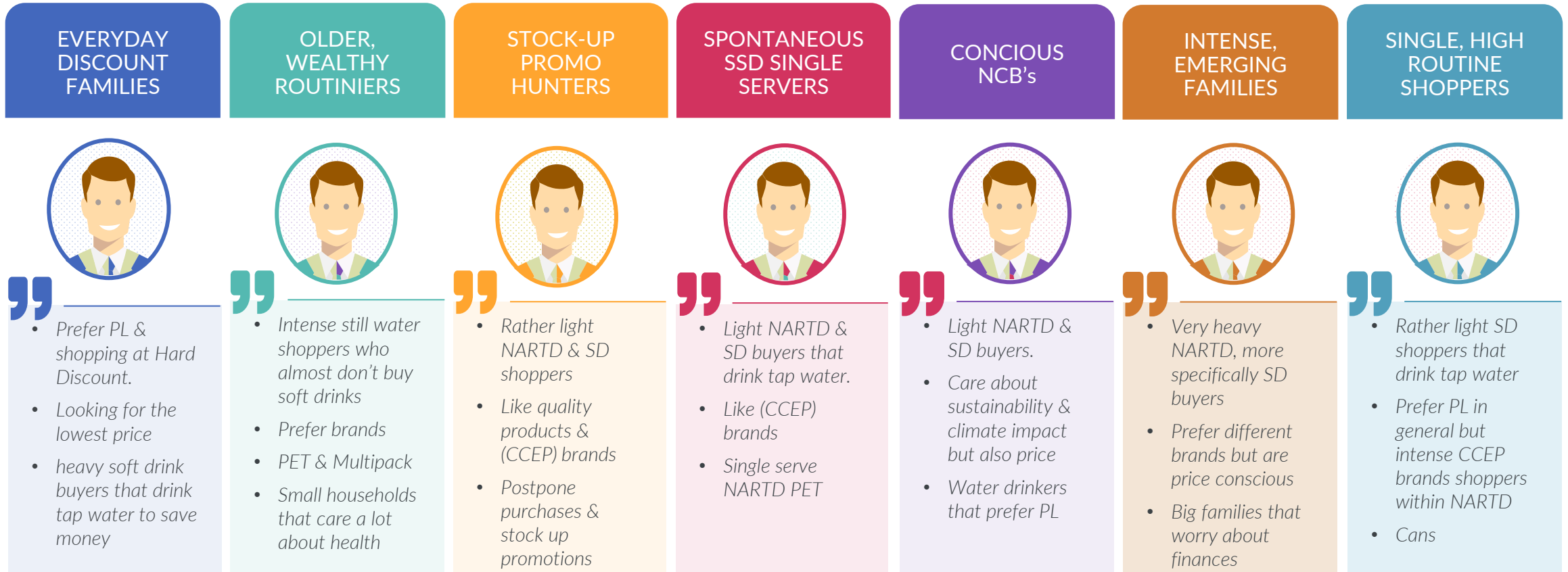


2

Summary Segments

NARTD Shopper Segments

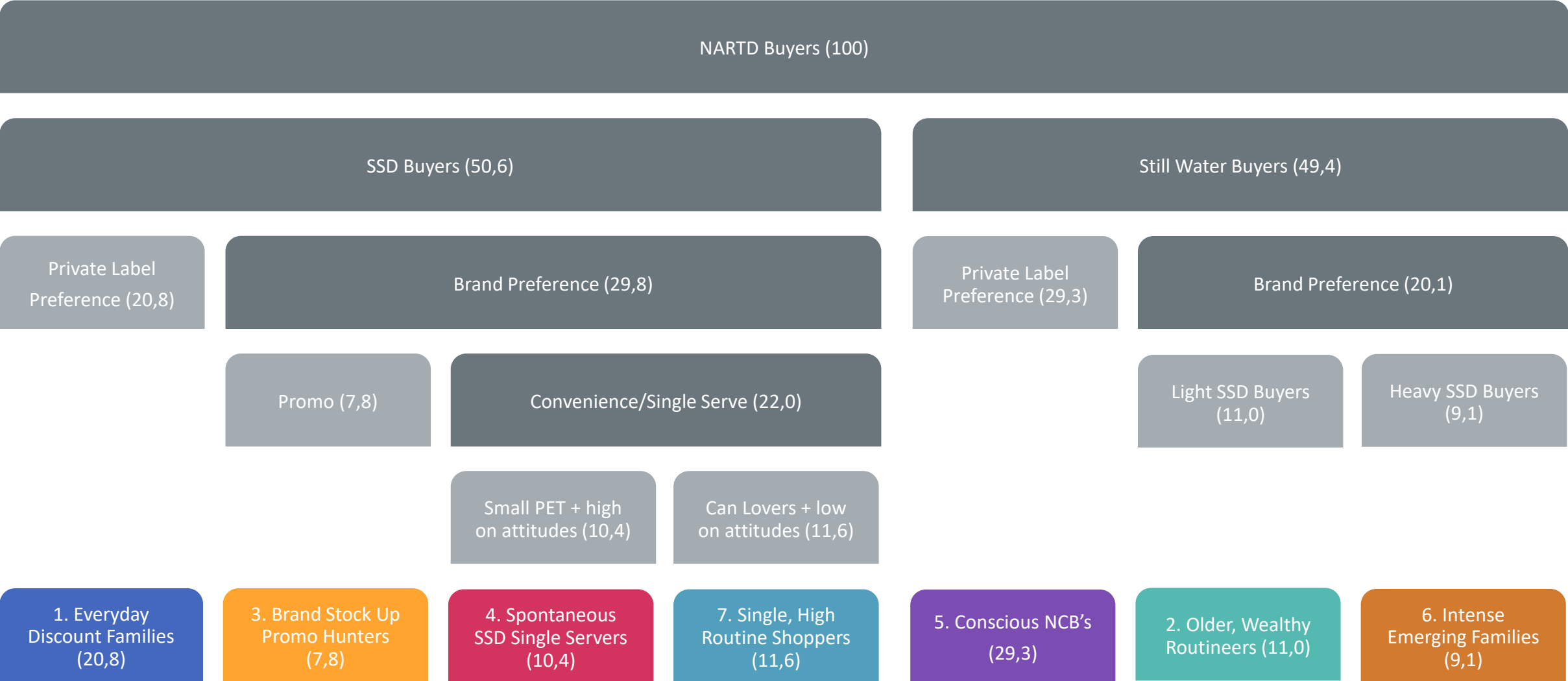
Period: MAT Aug 2023 | Total BE NARTD Market



Buyers %



NARTD Shopper Segments



Families -> Singles

EVERYDAY DISCOUNT FAMILIES (1)

“When shopping I pay particular attention to price”

Pricing is THE topic





Young Families with Children









Buy private label in NARTD

Tap water use assumed



FB Still	193
RTD Coffee	159
Water Flavoured	141
BitterTonicGinger	89
Sparkling Water NF (incl. Light)	74
Still Water NF	47




- Low spending per HH on Soft Drinks
- Frequency at aver. NARTD level





- Big PET, Brickpack
- Multi Serve
- Single Unit, Small Multipack

■ North
□ Brussels
■ South



Index | Buyer %

© GfK

10

EVERYDAY DISCOUNT FAMILIES (1)



"I don't have enough to cover my expenses"

"Main earner(s) is/ are currently employed"

Rural residence



Appearance/
(Personal)
Hygiene is
less
important.



- Promo, prices & convenience are important
- Lay-out & assortment are not the focus.



Not attracted
by
advertising

No attention for
health/healthy diet.



Few health problems
(awareness?)

Don't
exercise a
lot.



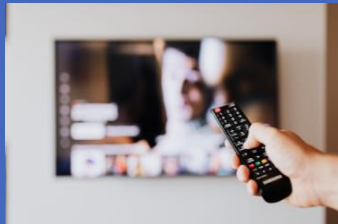
Planned Shopping

Not Spontaneous
or into new
products



Antisocial

Not spending
enough time
with children



Like clubbing, DIY,
watching TV

Not into travelling,
praying, shopping,
sport events,
theatre &
education courses



Daily Social Media &
Internet

Not into reading
printed magazines/
newspapers



Price is the Topic

- Private Label over brands
- Low-price stores
- Promotions are important
- Don't care a lot about nutritional or quality info of products
- Don't worry about climate/sustainability



Convenience
cooking

Less takeaway &
eating on-the-go

OLDER, WEALTHY ROUTINIERS (2)

“I consciously pay attention to a healthy diet”

Focus on health & natural ingredients.
Also care about hedonism & social responsibility. They do not shop spontaneous.





NDINKS & Pensioners



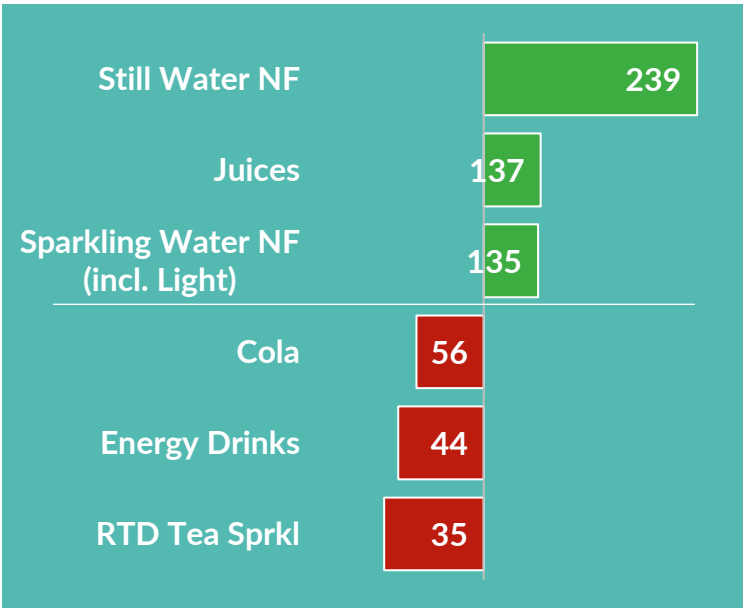







Buy A-Brands in NARTD

Bottled Still Water NF











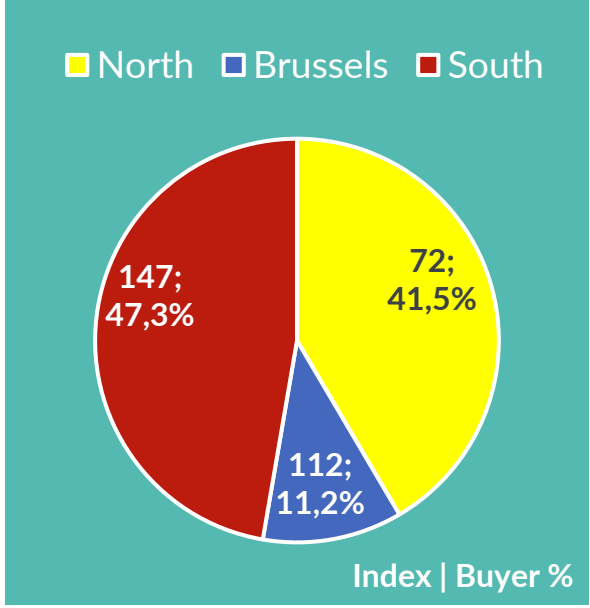


- High spending per HH on Soft Drinks
- Low NARTD frequency



- PET, Brickpack
- Multi Serve
- Multipack

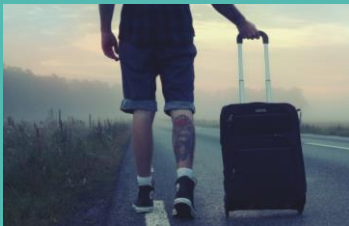


OLDER, WEALTHY ROUTINIERS (2)



"I am doing alright financial wise."

"Employment is not in danger"



Like praying, sports, cooking, clubbing, out-of-home activities, travelling & eating out

Not into handicrafts, animals, watching tv



Live an active, exciting life.



Appearance/ (Personal) Hygiene is important.



- Like a nice atmosphere, cleanliness & clear store lay-out
- Opening hours & quick service are subordinate



Not attracted by advertising

Health/healthy diet is very important.



High blood pressure, gluten intolerance & skin problems

Exercising & figure awareness



Planned Shopping

Not Spontaneous or into new products



Dislike daily rush

Do not like changes in lifestyle

Daily tv, radio & newspapers

Not into podcasts, social-media, online newspapers, streaming services



Likes cooking (fancy meals)

likes takeaway & ready-to-eat meals & not a fan of eating OTG




Health & quality are the topics

- Like brands & are loyal to some
- Quality seals are important
- Prefer local, organic & natural products.
- Not fond of light/zero & lactose-free products. Like high protein & gluten free products.
- Stock up FMCG & are not a fan of online groceries

STOCK-UP PROMO HUNTERS (3)

"I specifically look for products on special offer"

Advertising is THE topic. Also focus on hedonism.

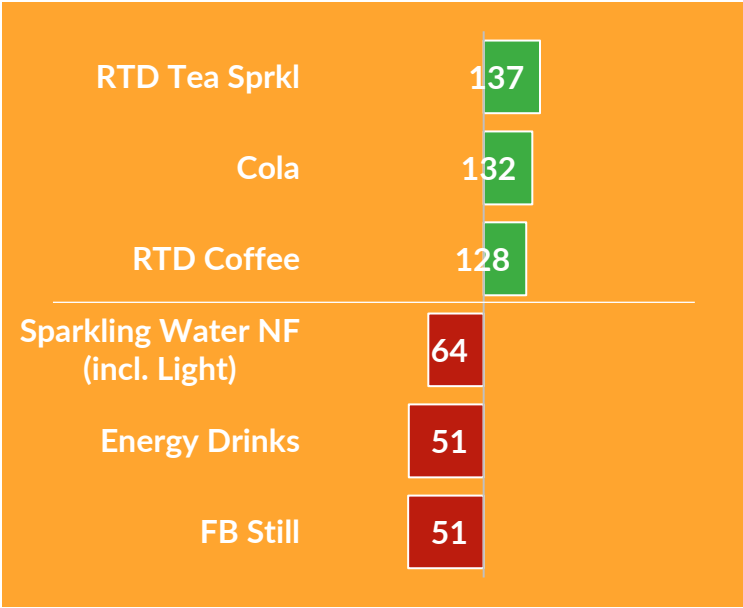
(N)DINKS, upper class HH with children & Pensioners



Buy A-Brands in NARTD, preferably in promo



Bottled Still Water NF

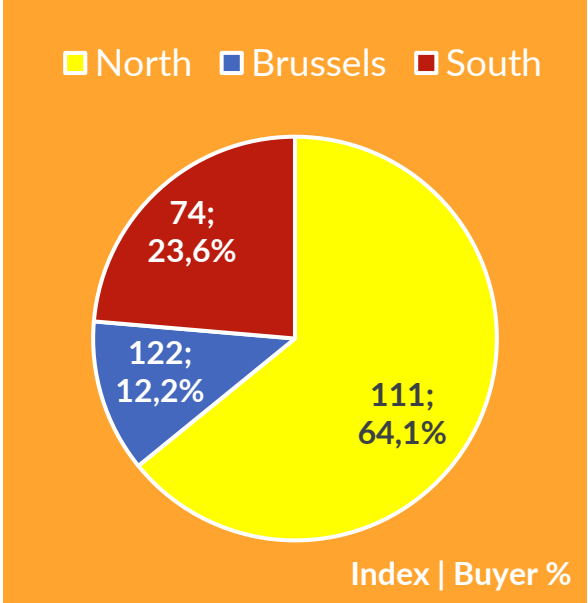



- High spending per HH on Soft Drinks
- Very Low NARTD frequency

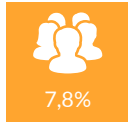




- Big PET & Glass
- Multi Serve
- Multipack



STOCK-UP PROMO HUNTERS (3)



"I don't have to limit my expenses & can afford everything I want."

"Employment is rather not in danger"

Very social group



Attracted by advertising

Physical health is important.



High blood pressure, gluten intolerance & allergies

Exercising & staying fit



Planned Shopping

Have new products before others & buy things spontaneously



Dislike daily rush

Do not like changes in lifestyle



Like gaming, family time, socializing, reading, listening to music & travelling

Not into praying, theatre & education



Appearance/ (Personal) Hygiene is important.



Daily tv, radio, podcast & newspapers



Not into magazines & streaming services



- Like promotions, a big branded & organic assortment & loyalty programs
- Delivery service & ready-to-eat meals are subordinate

Like cooking (fancy meals) & do so regularly



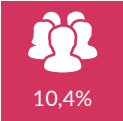
Don't like takeaway & eating on-the-go



Promotion is the topic

- Like brands & are loyal to some
- Nutritional info & quality seals are important. They care more about fair-trade than climate friendliness
- Shopping around for prices & offers
- Like low-salt & gluten-free products. Not fond of light/zero & low-fat
- Postpone purchases & stock up FMCG. Like online shopping

SPONTANEOUS SSD SINGLE SERVERS (4)



“In the store I often decide spontaneously what to buy”

Focus on health, natural ingredients, sustainability, innovation & hedonism

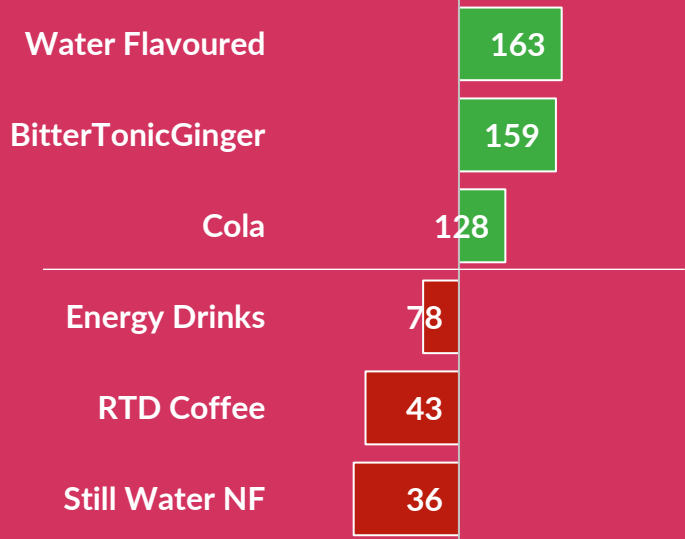


Households without Children



Buy A-Brands in NARTD

Tap water use assumed

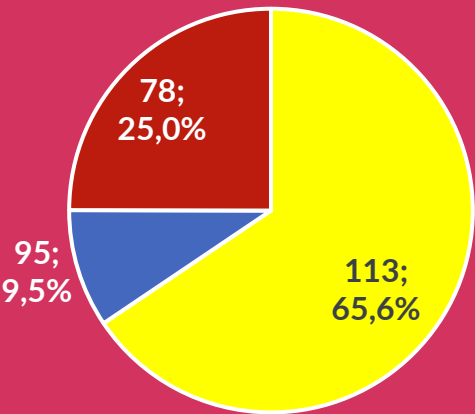


- Spending per HH on Soft Drinks at cat. level
- Frequency at aver. NARTD level



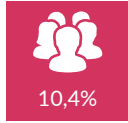
- Small PET
- Single Serve
- (Small) Multipack

North Brussels South



Index | Buyer %

SPONTANEOUS SSD SINGLE SERVERS (4)



Mix of "I don't have to limit my expenses" & "I just have enough to make ends meet"

High share of retired people

Social people with high value for family



Like education courses, handicrafts, volunteering, theatre, reading, tv, music, sport events, cooking/baking, gardening, time in nature & with animals

Not into clubbing & praying



Appearance/ Personal hygiene is important.



Attracted by advertising



Health/healthy diet is very important.



Diabetes, high cholesterol, lactose intolerance



Exercising & figure awareness



No planned shopping

Have new launched products & buy spontaneously



Under time pressure to shop. Pay more to save time.



Do not like changes in lifestyle

Daily tv, & (online) newspapers

Not into podcasts, streaming services or social media



- Like RTE meals, delivery service, range of pack sizes, a nice atmosphere & friendly staff
- Promotions & parking space are subordinate



Like cooking (fancy meals), eating out & takeaway

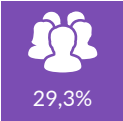
Not a fan of eating on-the-go



Convenience, sustainability & health are the topics

- Don't prefer brands over PL in general but stay loyal once convinced
- Quality/regional/organic features are important.
- Care about fair-trade, sustainability & animal welfare. Like light/zero products.
- Don't check offers & like to buy everything in one time at a shop nearby. Like online shopping

CONSCIOUS NCB's (5)



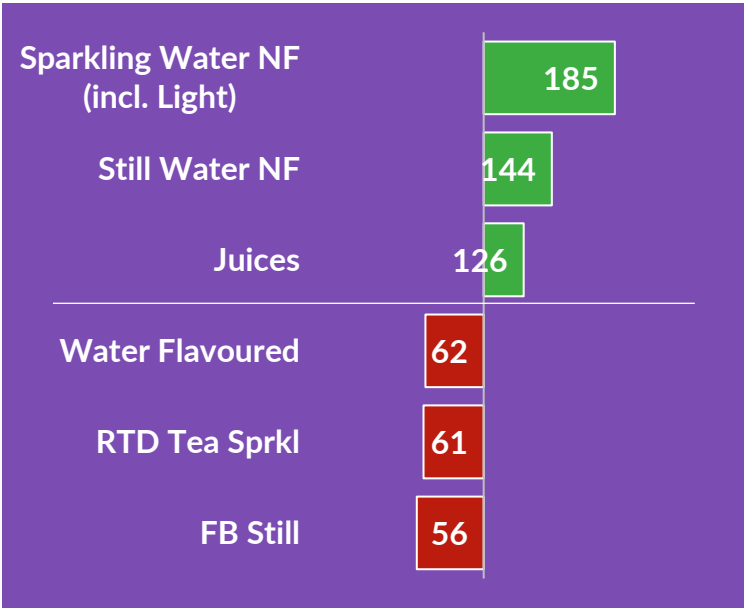
"Organic/Bio products made from natural ingredients are very important to me"

Focus on natural ingredients, health & sustainability

Singles & Pensioners

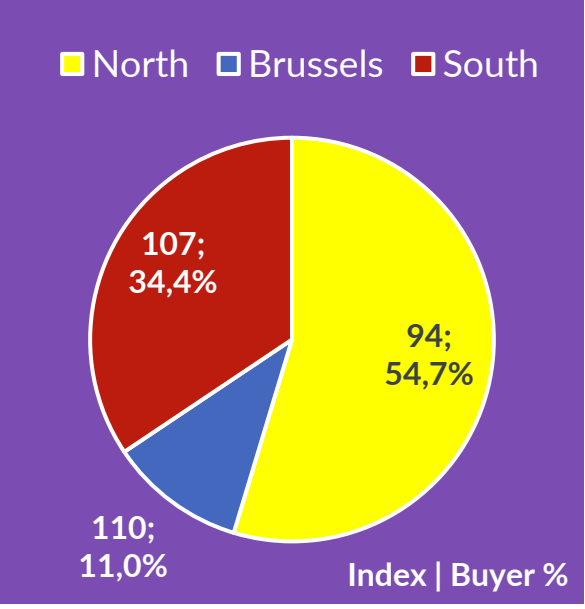
Buy private label in NARTD

Bottled Still Water NF

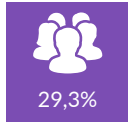


- Low spending per HH on Soft Drinks
- Low NARTD frequency

- Big PET, Glass, Brickpack
- Multi Serve
- Single Unit (Containers)



CONSCIOUS NCB's (5)



Mix of "Main employer is unemployed"
& "Employment is certainly not at risk"

*"I am well provided for & can afford
many things I want"*



Like theatre, spa/sauna,
concerts, time in nature,
reading, comfort time at
home, shopping, gaming,
cinema, cooking &
outdoor activities &
travelling

Not into
handicraft/DIY,
sport events,
clubbing &
surfing the
internet.



Urban residence



Appearance/
is important.

General
Hygiene too.



- Like retailers close to home/workplace with parking, delivery service, organic/local/ecological assortment.
- Nice atmosphere. & loy. cards are subordinate



Very
suspicious of
advertisement

Daily podcasts &
magazines

Not into tv, radio,
social media &
streaming services

Health/healthy diet
is very important.



Lactose intolerance,
high % health
problems/Intolerance.
Low % diabetes

Exercising
regularly.
Highest % of
vegan/
vegetarianism



No planned shopping

Have new launched
products & buy
spontaneously



Prefers out-of-home
activities over in-
home

Do not like changes
in lifestyle



Planet, health but also
price are the topics

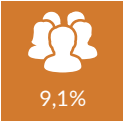
- Shop around for special offers. Prefer shops with the lowest prices. They pay attention to price
- Quality/regional/organic features are important.
- Care a lot about sustainability & impact on climate. Not fond of light/zero & low-fat.



Like cooking (with
convenience
products) & eating
on-the-go

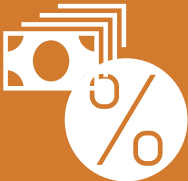
Don't like
takeaway &
eating out

INTENSE, EMERGING FAMILIES (6)



"I Buy What I Like"

Focus on pricing,
advertising, hedonism
& innovation



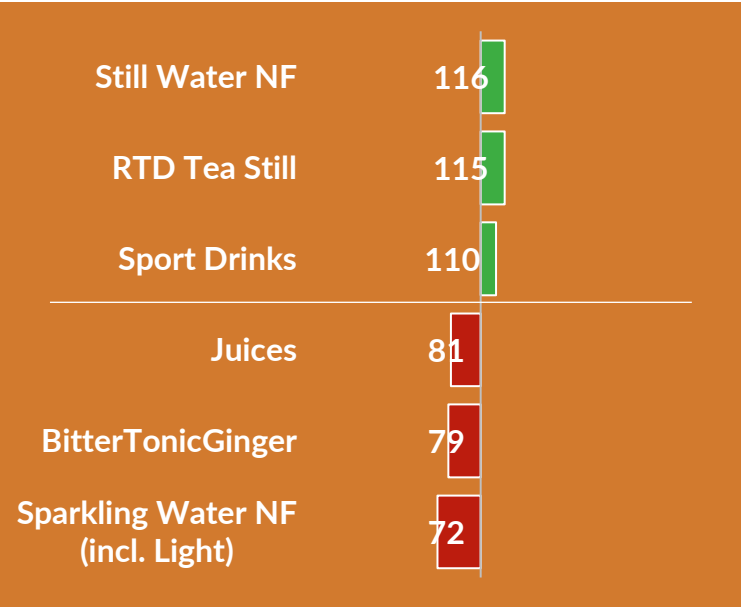
Lower Class
Households with
Children



Buy
A-Brands in
NARTD,
preferably in
promo



Bottled
Still Water
NF



Low spending per HH
on Soft Drinks

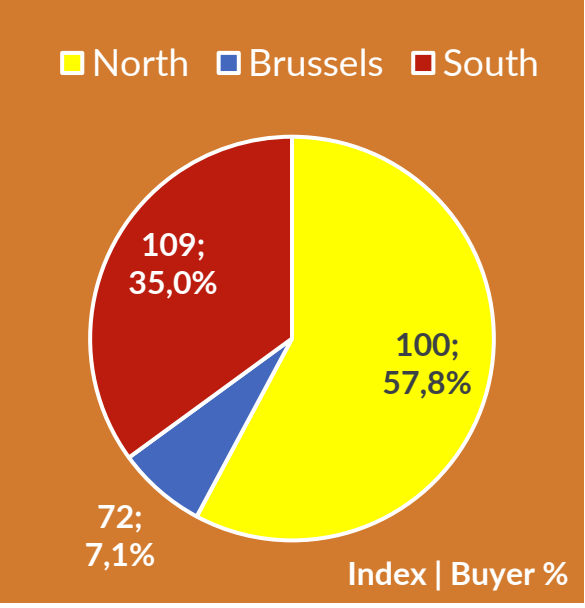
Very high NARTD
frequency



Big PET

Multi Serve

Big Multipack



INTENSE, EMERGING FAMILIES (6)



"I don't have enough to cover my expenses/to make ends meet"

Employment at risk or unemployed

Rural residence



Attracted by advertising

Health/healthy diet is not important.



Gluten intolerance, diabetes & skin problems

Don't exercise a lot but figure awareness



No planned shopping

Have new launched products & buy spontaneously



Under time pressure (to shop)

Do not like changes in lifestyle but like trying out new products



Appearance/ Personal hygiene is not that important.



Like sport events, cinema, shopping, spa/sauna, concerts, surfing the internet

Not into praying, reading, sporting, gaming, DIY, watching tv, gardening, education, outdoor activities & volunteering



- Like brands, delivery service, self-scan, parking, RTE meals, convenience services & loyalty cards.
- Sustainable & climate friendly assortment are subordinate

Daily tv, streaming services, podcasts, online videos,

Not into radio & newspapers



Do not like to cook & prefer takeaway food & convenience products.

Like eating on-the-go



Price is the topic

- Prefer brands over PL but are not loyal too them & always compare prices.
- Like light/zero & low-fat products. Origin/quality of products is less important
- Looking for special offers & switch shops for them. Don't stock up
- Like online shopping. Prefer a reachable store where they can buy everything in one time

SINGLE, HIGH ROUTINE SHOPPERS (7)



"When shopping, I pay particular attention to price"

Are not motivated by any attitude

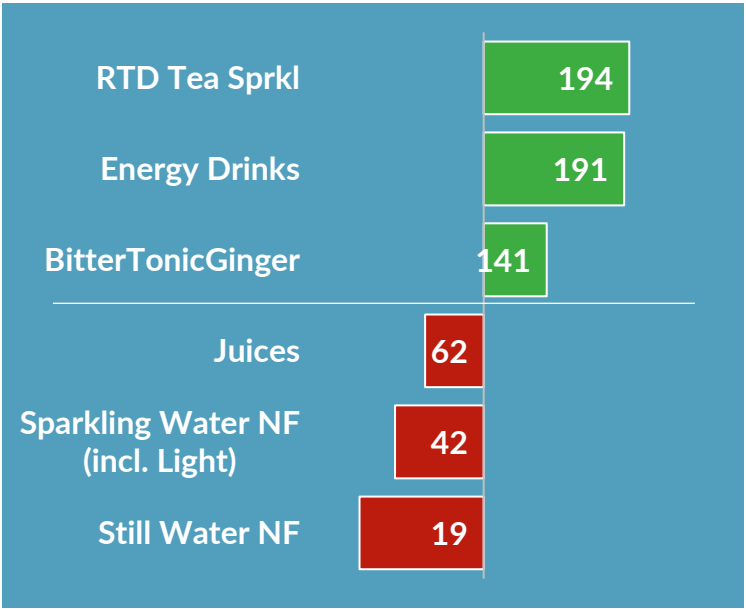


Households without Children (excl. NDINKS)

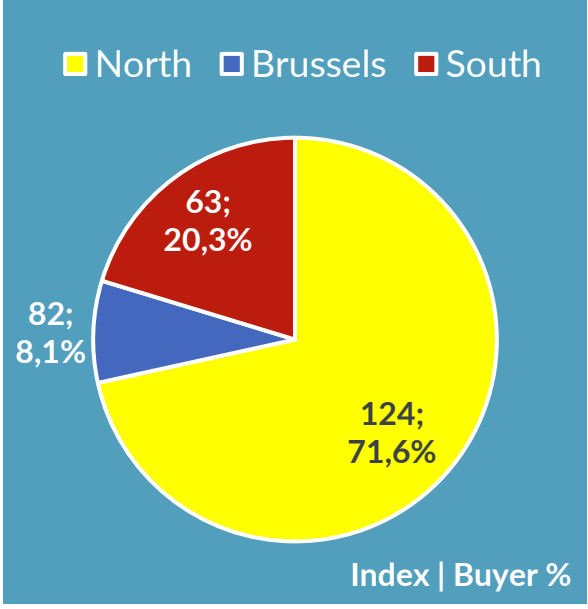


Buy A-Brands in NARTD

Tap water use assumed



- Very high spending per HH on Soft Drinks
 - Low NARTD frequency
- Cans, glass
Single Serve
Big Multipack



SINGLE, HIGH ROUTINE SHOPPERS (7)



"I am well provided & can afford the things I want/have no limits to my expenses"

Employment at risk or retired

Rural residence



Appearance/
(Personal)
hygiene is
not that
important.



- Like a quick, easy & clean store with self-scanning & nice atmosphere
- Branded assortment, loyalty cards & delivery service are subordinate



Not attracted
and
suspicious of
advertising

Daily tv, streaming
services, radio,
magazines &
newspapers

Not into podcasts &
online videos

Health/healthy diet
is not important.



Allergies/intolerances
& diabetes

Exercise
regularly to
stay fit.



Family is
less
important



Not rushed by daily
routine

Like changes in
lifestyle



Like volunteering,
time with animals or
friends, sporting,

Not into praying,
clubbing, DIY,
gardening, theatre,
gaming, cinema,
cooking, listening to
music, spa, family time,
travelling



**Convenience is the
topic**

- Prefer PL over brands
- Like high fibre/protein, low-fat or light/zero products.
- Don't care about quality seals, regional, sustainable or organic labels
- Don't stock up. They prefer to buy everything in one store & are not really interested in special offers or price comparisons. They don't buy spontaneously



Do not like
cooking at home.

Like takeaway
food, convenience
products, eating
out & OTG

Memorandum GfK Consumer Panel Belgium



Sample structure



- The household panel is designed as a stratified sample drawn from the population of private households in Belgium.
- The stratification considers the household criteria 'age of the reference person' and 'household size'.
- The structure of the sample is based on the principles of optimal allocation

Data collection



- Panel members register their domestic purchase behavior regarding a defined range of FMCG products, regardless the outlet of purchase.
- Registration of purchase behavior is done via the MyScan® smartphone app or by means of an electronic device with an integrated barcode scanner.
- The registered data are transmitted to the research center using a wireless internet connection or the mobile telephone network respectively

Weighting Procedure



- The resulting net reporting samples are weighted. The weighting procedure is based upon the design of the disproportional stratified sample characterized by:
 - Household size
 - Age of the reference person
 - District
 - Size of the municipality
 - Presence of children below 3 years old
- Data on the structure of the target population are updated annually based on information from Statbel, the Belgian statistical office.
- Moreover, the method of response weighting is applied to compensate for missing shop visits in the actual scanned purchase behavior. Improving trip coverage is based upon the combination of trip size and age of the reference person.

Projection



- Data are levelled up from sample size to population size to become estimates for markets at a national scale. The development of the population size is taken into account to make these estimates.
- For every reporting period within a year the population size is fixed to the expected number of households within that year. Based on updated time series, we expect about 5.105.003 private households in Belgium by 31/12/2023.



Let's turn our
proposition into
real insights for you!



Karel de Ridder
Account Manager
Karel.DeRidder@gfk-cps.com
+32 470 21 42 27
+32 2558-0575

Thomas Nauwelaerts
Analytics Manager
Thomas.Nauwelaerts@gfk-cps.com
+32 1679-5778

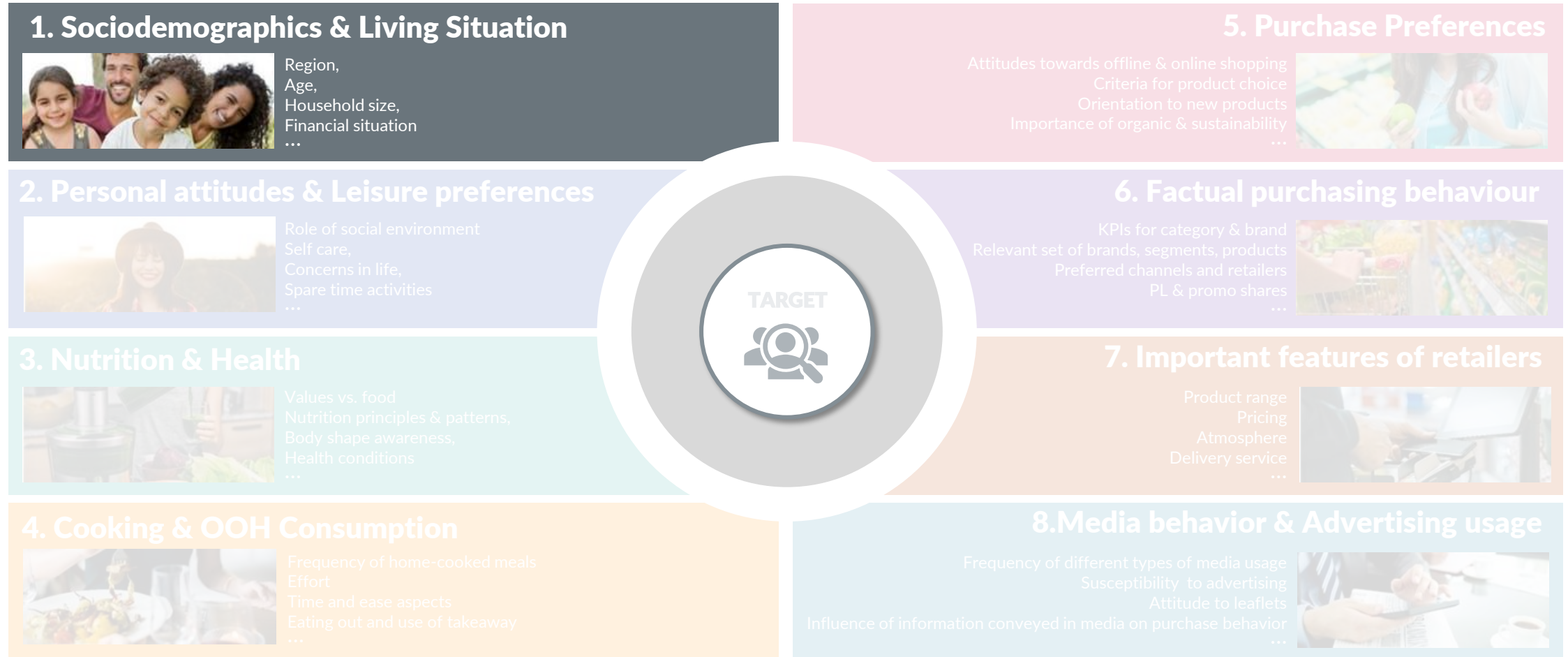
3

Appendix

01

Everyday Discount Families

Chapter 1: Sociodemographics & Living Situation



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

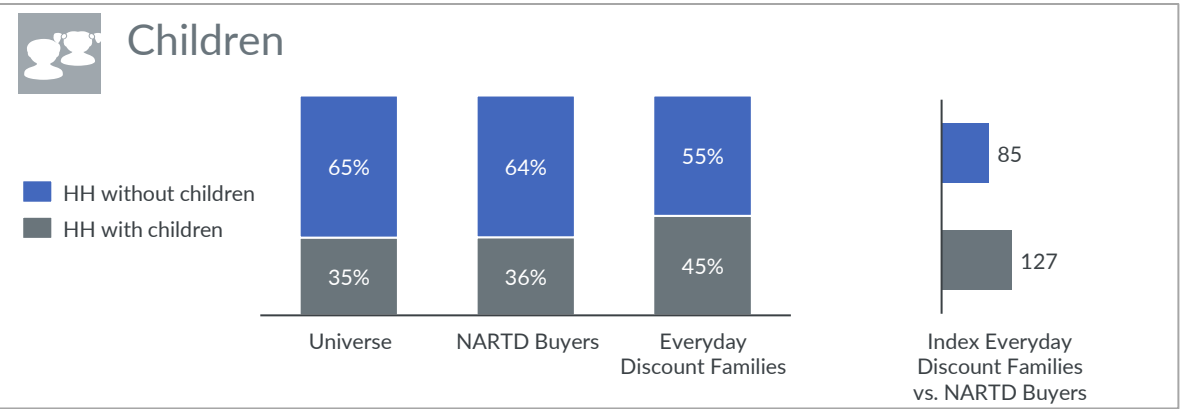
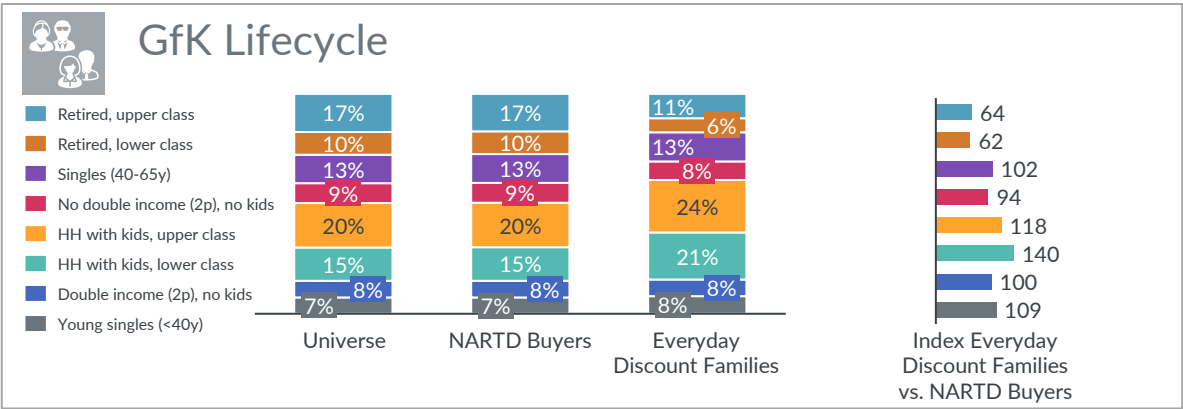
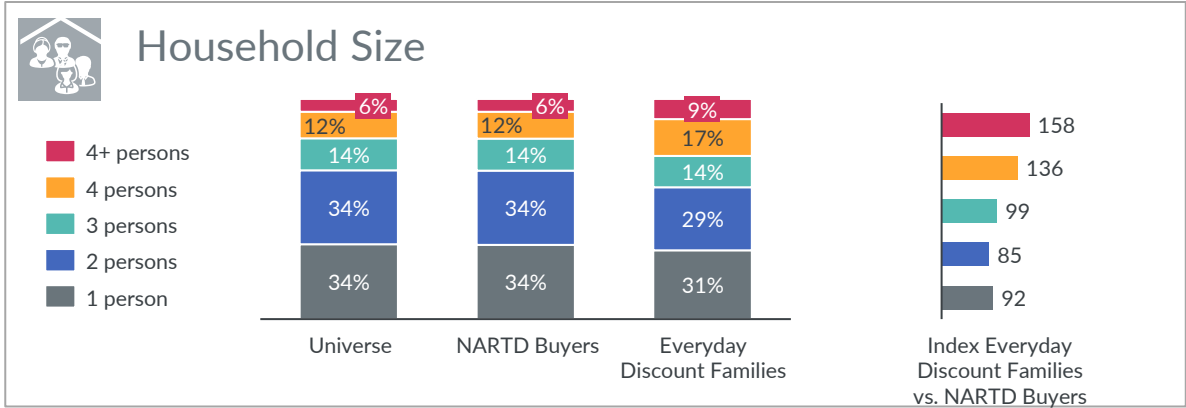
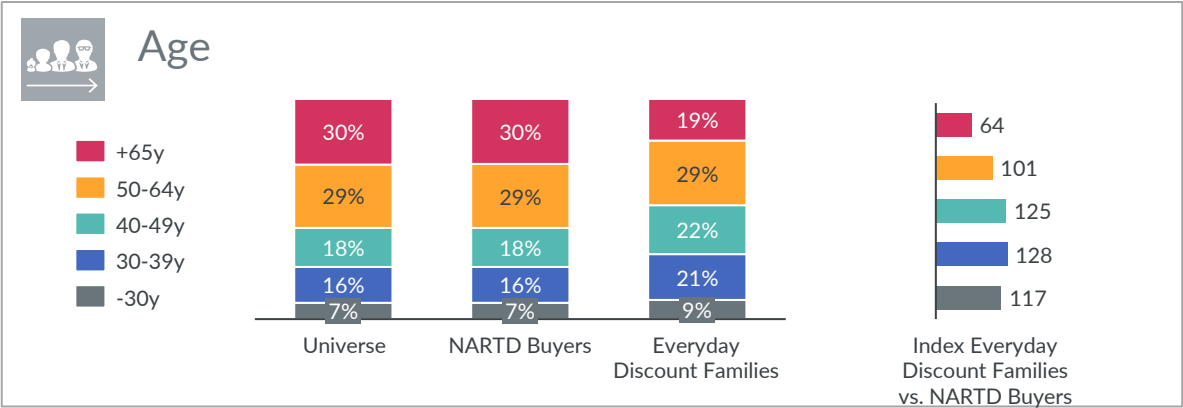


1



Sociodemographics & Living Situation

Everyday Discount Families



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1

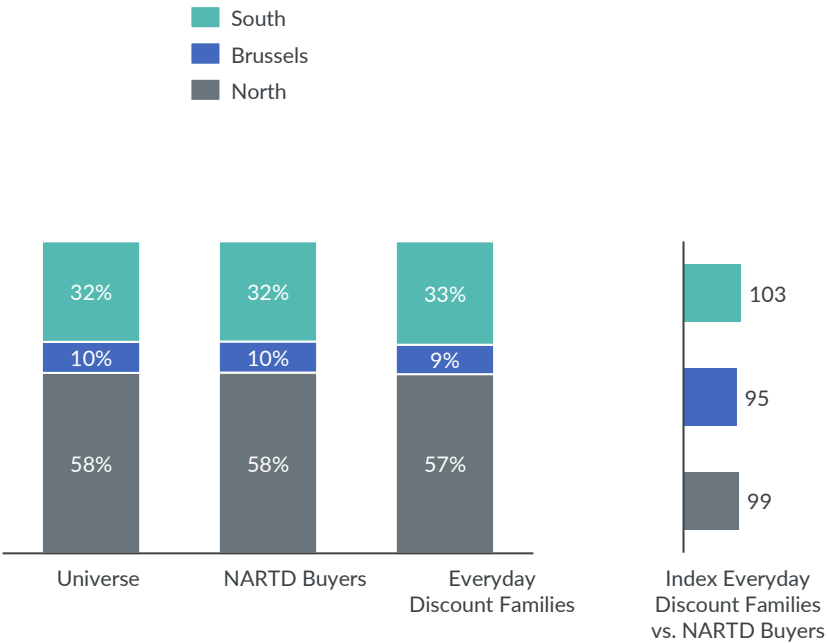


Sociodemographics & Region

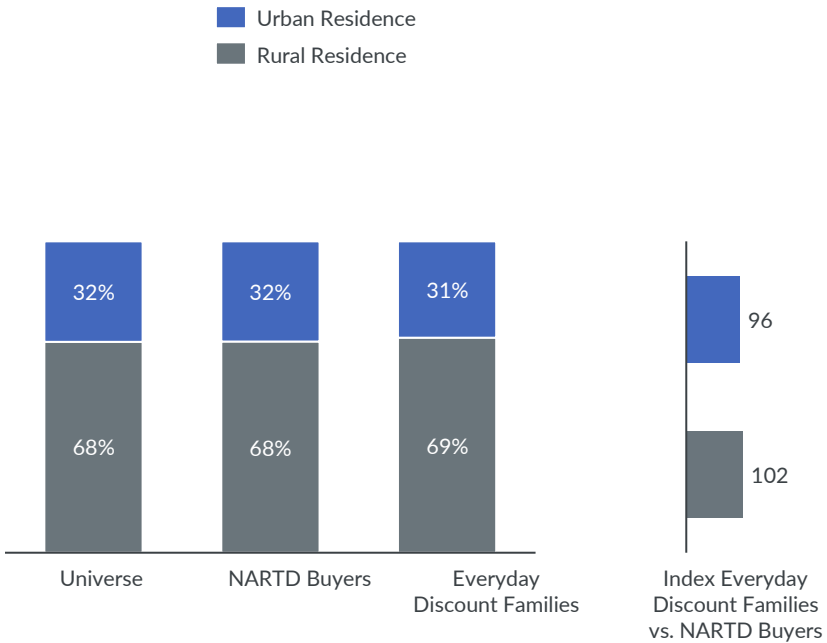
Everyday Discount Families



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



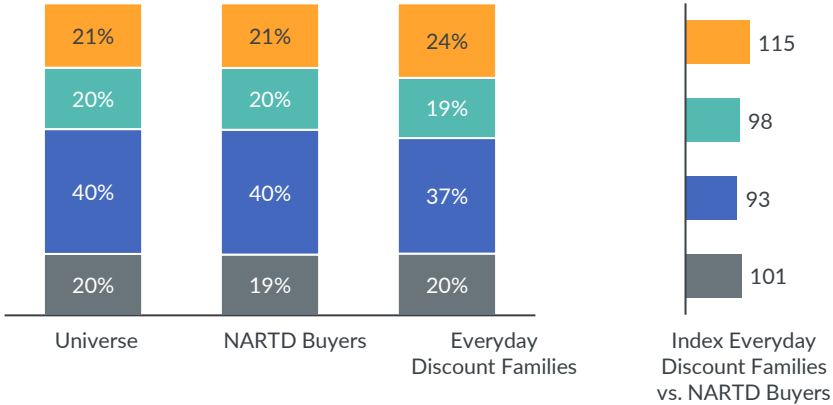
Sociodemographics & Financial Situation

Everyday Discount Families



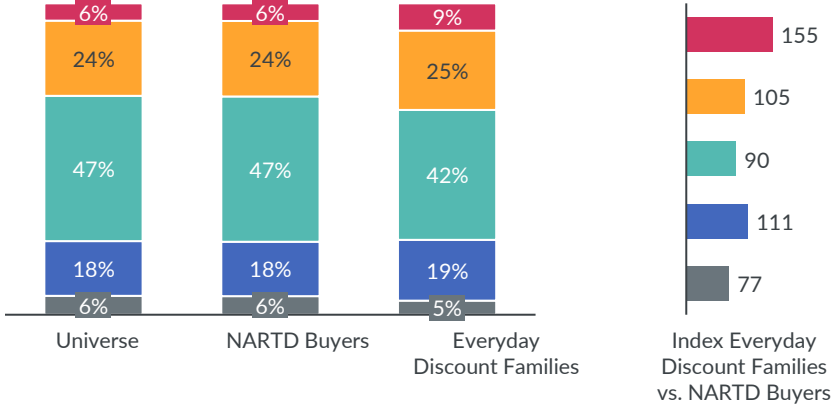
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

1



Sociodemographics & Financial Situation



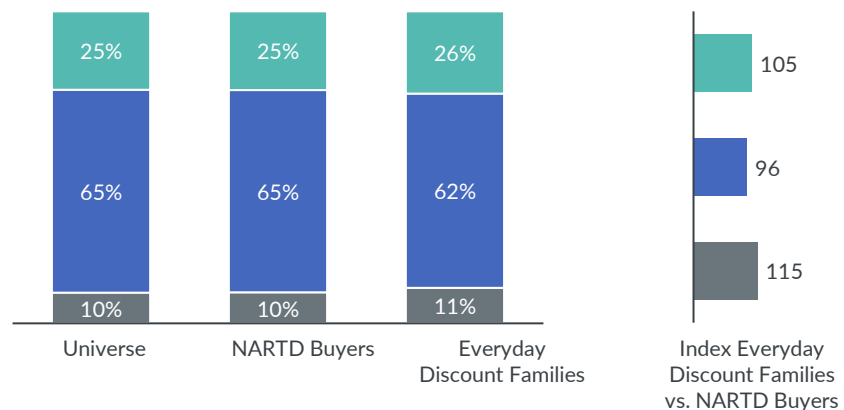
Everyday Discount Families



Future Financial Situation

Do you think that in 12 months your financial situation will have

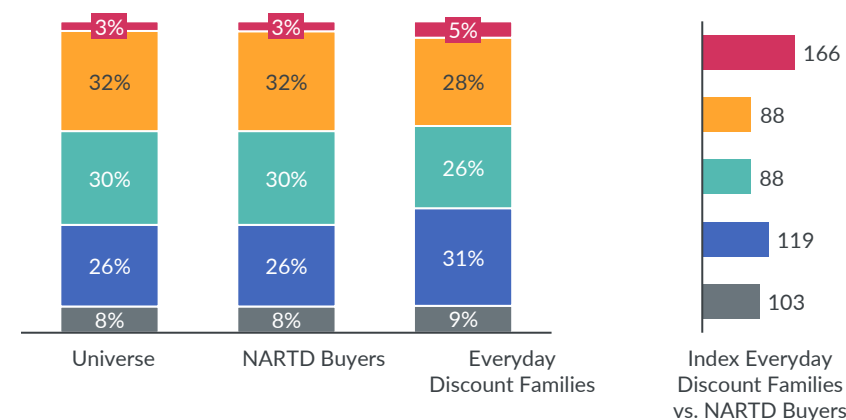
- worsened
- stayed the same
- improved



Employment

Could the employment of the main earner(s) in your household be at risk?

- Main earner(s) is/are currently unemployed
- Main earner(s) is/are not working/employed (e.g. is retired)
- Certainly not
- Rather not
- Yes



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

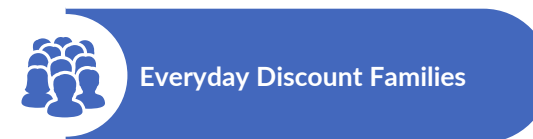
What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences

top and flop statements



Going to clubs/ nightclubs	2%	177
Do it yourself projects/ activities (DIY)	14%	127
Watching TV/ movies	13%	120
Playing computer games	39%	103
Doing handicrafts/needlework	18%	103
Visiting training / continuing education courses	8%	69
Going to the theatre	11%	69
Going to sport events: games/ competitions	7%	67
Shopping	25%	61
Meditating, praying, going to church	4%	39

Share of agreement
NARTD Buyers

Index Everyday Discount
Families vs. NARTD Buyers

- Leisure activities of the target group in focus: Next to clubbing, they are very in-home oriented.
- Spiritual or classic out of home activities are not favorable

Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

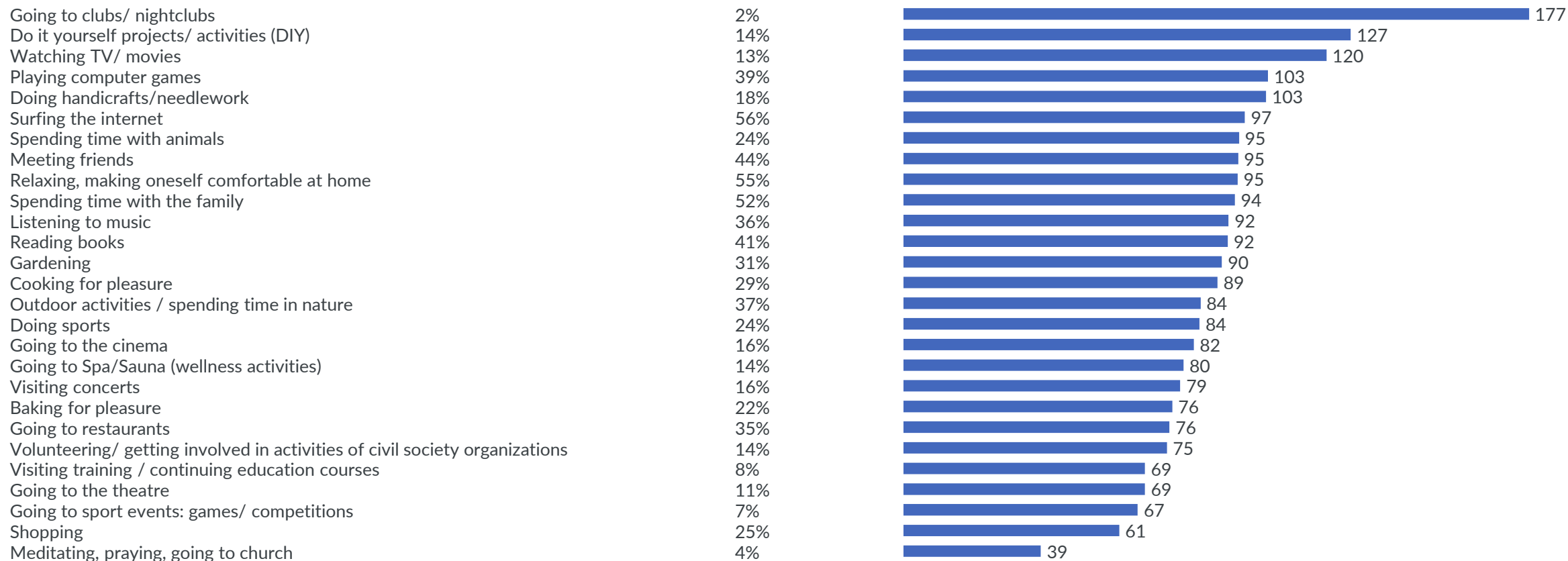
2



Personal attitudes & Leisure preferences



Everyday Discount Families



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

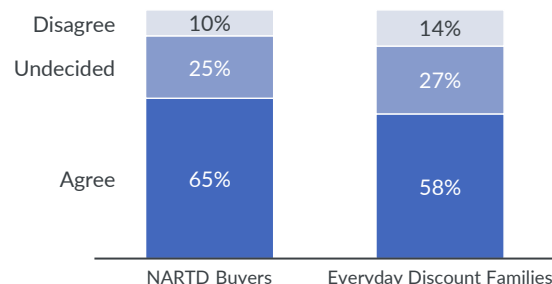


Personal attitudes & Leisure preferences

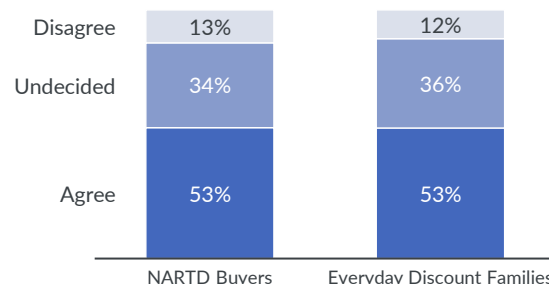


Everyday Discount Families

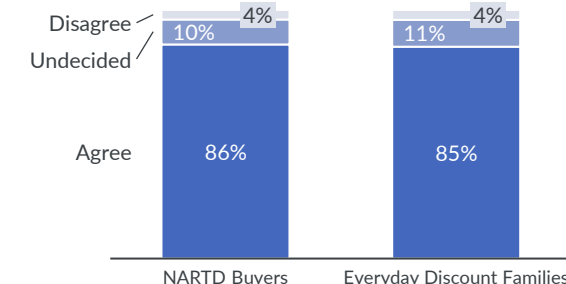
I like to be among people and enjoy socializing.



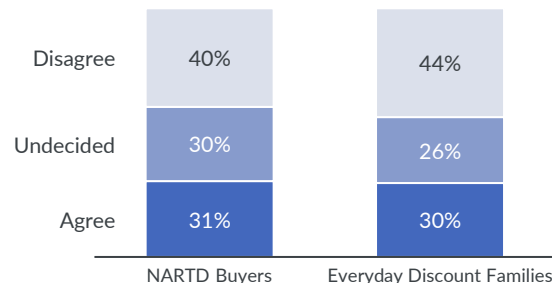
I do not like changes in my lifestyle.



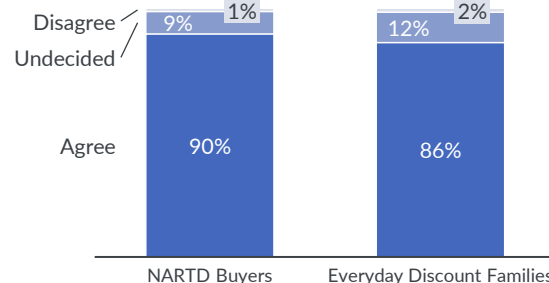
Family means a lot to me.



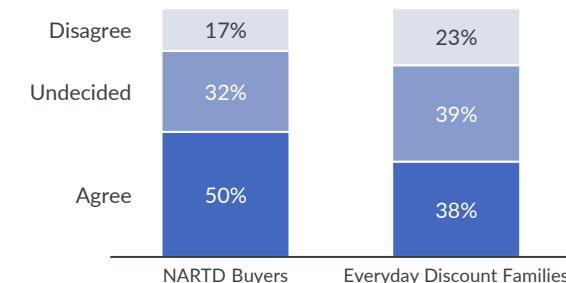
I do not worry about my future financial situation when I retire.



It is important to spoil yourself occasionally.



My appearance/ look is very important to me.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

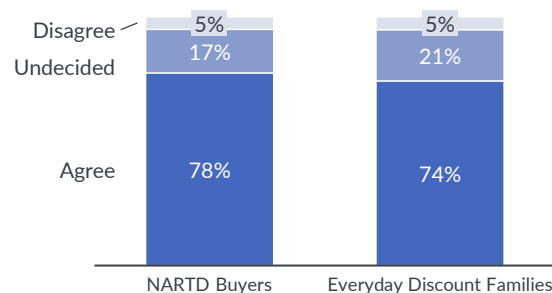


Personal attitudes & Leisure preferences

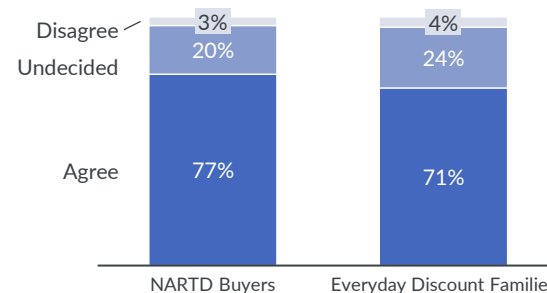


Everyday Discount Families

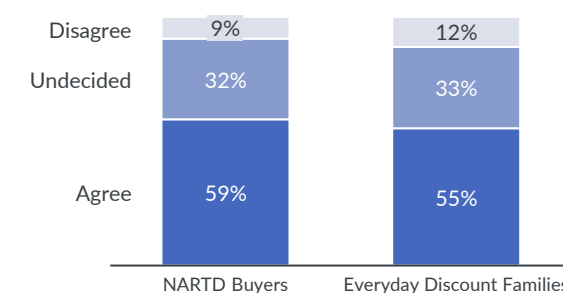
Personal care & hygiene play an important role for me.



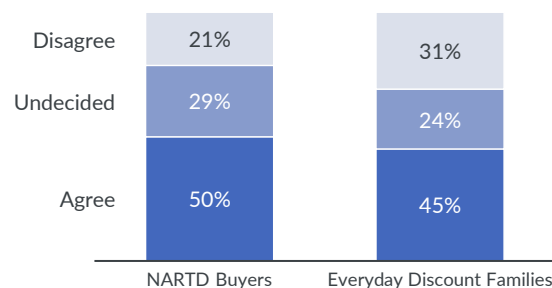
I pay a lot of attention to cleanliness and hygiene in the household.



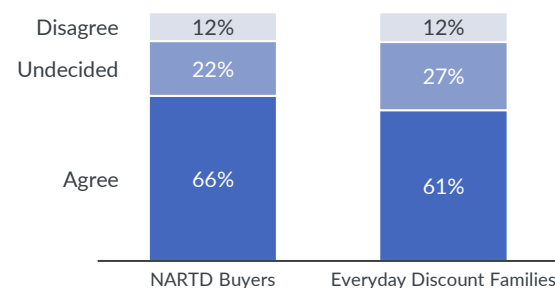
I would like to have more time and less rush in my daily routine.



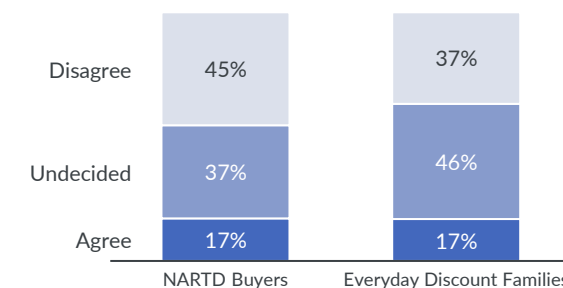
I feel I spend enough quality time with my children. only for HH with kids



I love travelling.



What is currently being done to protect the environment is quite sufficient.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

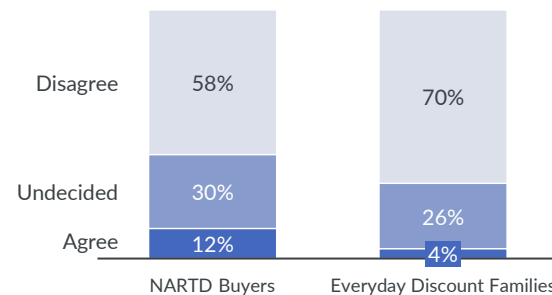


Personal attitudes & Leisure preferences



Everyday Discount Families

I often have newly launched products faster than my friends.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



Everyday Discount Families

● NARTD Buyers

● Everyday Discount Families



I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 105
I like to spoil myself with good food.	83%	<div></div> 99
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 99
When eating and drinking I watch my figure.	46%	<div></div> 82
I take care of my inner, mental health/balance.	54%	<div></div> 78
I exercise regularly to stay fit.	50%	<div></div> 77
I do a lot for my health.	48%	<div></div> 70
I consciously pay attention to a healthy diet.	59%	<div></div> 66

Share of agreement
NARTD Buyers

Index Everyday Discount
Families vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



Everyday Discount Families

- The focus target group does not pay attention to a healthy diet or lifestyle at all.
- Mental health is also not top of mind for this target group.

Nutrition & Health

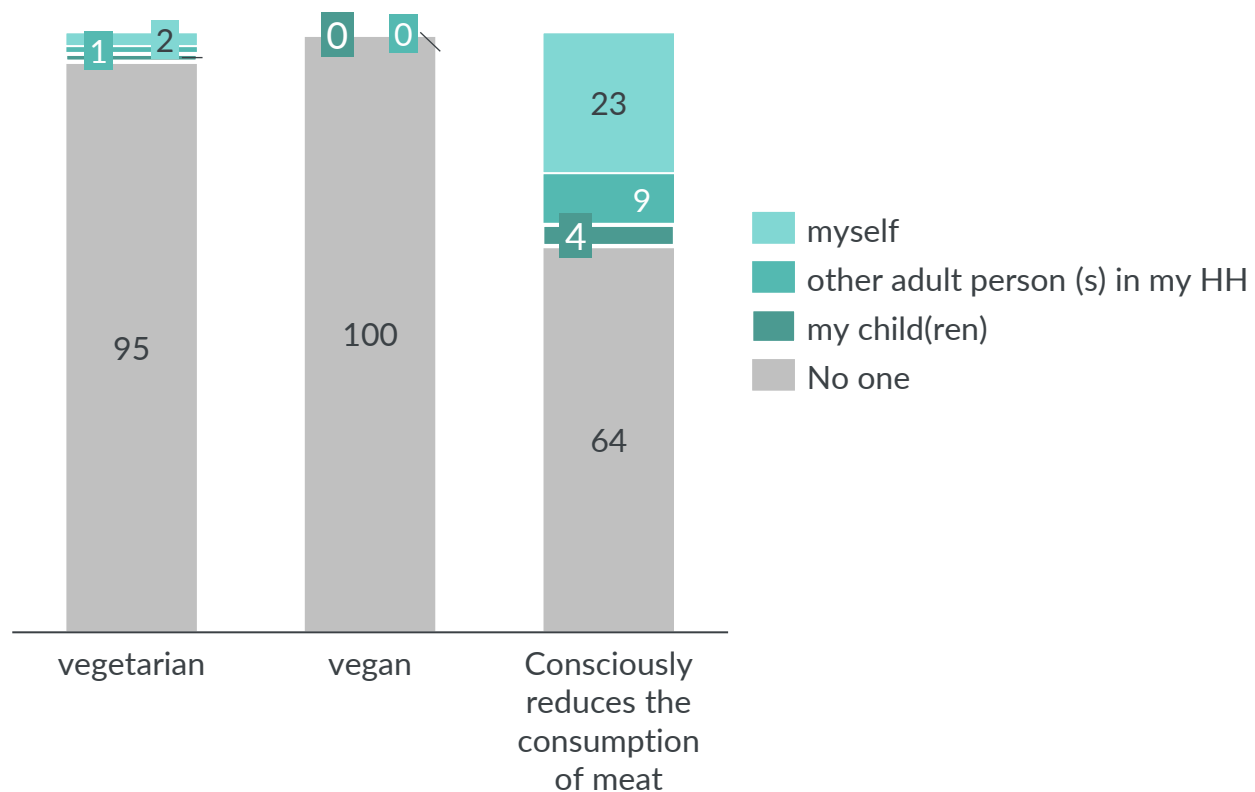
Special Nutrition patterns

3



Nutrition & Health

Share of different nutrition styles in the households



Everyday Discount Families

- The focus target group does not pay attention to their meat consumption, let alone adopt a purely plant-based diet.

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

No, relevant health conditions with impact on shopping behavior	60%	110
High blood pressure	10%	90
Others, not mentioned here	4%	89
Diabetes	10%	88
High cholesterol level	13%	88
Skin problems	6%	86
Lactose intolerance	7%	86
I prefer not to answer	3%	84
Other allergies or intolerances	9%	43
Coeliac disease (gluten intolerance)	2%	9

Share of agreement
NARTD Buyers

Index Everyday Discount
Families vs. NARTD Buyers



Everyday Discount Families

- The focus target group has comparatively few health problems

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption

4



Cooking & OOH Consumption



Everyday Discount Families

I prefer to cook meals that do not take a lot of time to prepare.	46%	115
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	113
The easier the cooking, the more I like it.	45%	112
At home we cook hot meals every day/very often.	82%	100
I often eat quickly and 'on the go'.	10%	89
I like to cook.	60%	89
I often eat out (canteen, cafe, restaurant, etc.).	13%	87
I often order takeaway food, delivered at home or for pick up).	7%	87
I love to cook fancy/exceptional dishes and meals.	19%	72

Share of agreement
NARTD Buyers

Index Everyday Discount
Families vs. NARTD Buyers

- the target group prefers cooking fast & easy with convenience products.
- Eating out or takeaway food are not top of mind.

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

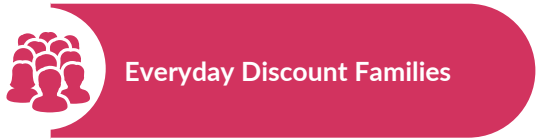


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



Purchase preferences

What do shoppers consider when they purchase?

5

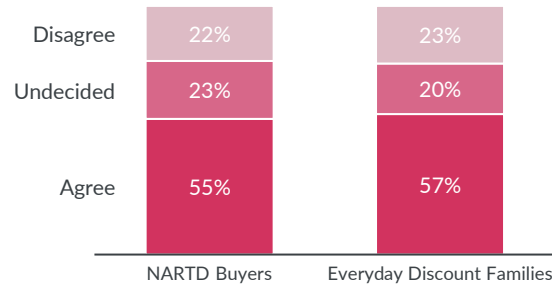


Purchase Preferences

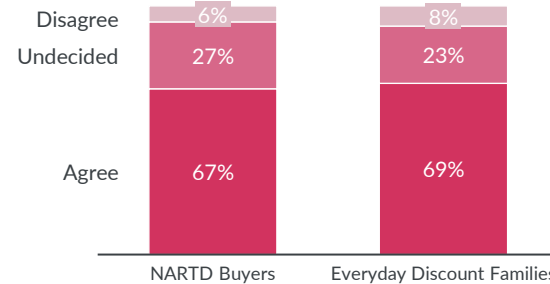


Everyday Discount Families

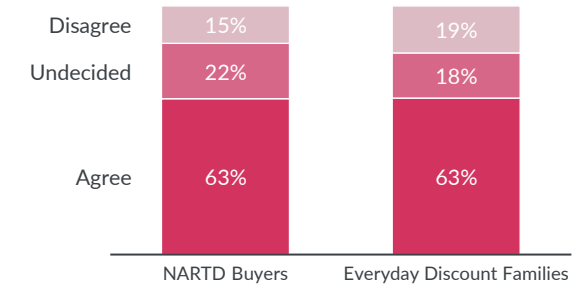
Before I go shopping, I regularly check the offers of the stores (advertisements, leaflets ...).



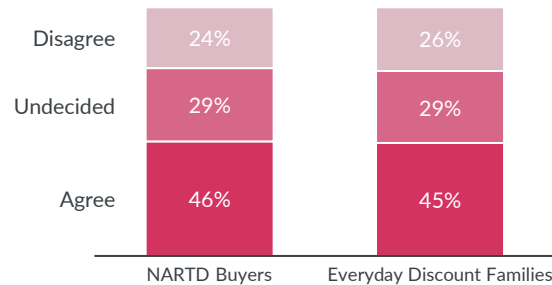
I prefer to purchase in stores, that I can reach quickly.



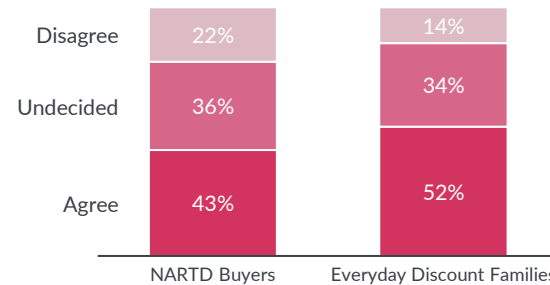
I want to buy everything I need in just one store, if possible.



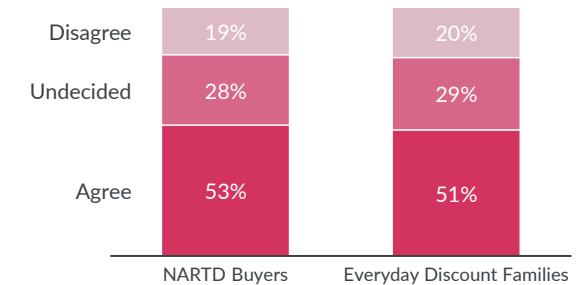
I shop in different stores to find the best prices and special offers.



When shopping, I only consider stores that I know offer the lowest prices.



Before buying something, I always compare the prices of the brands.

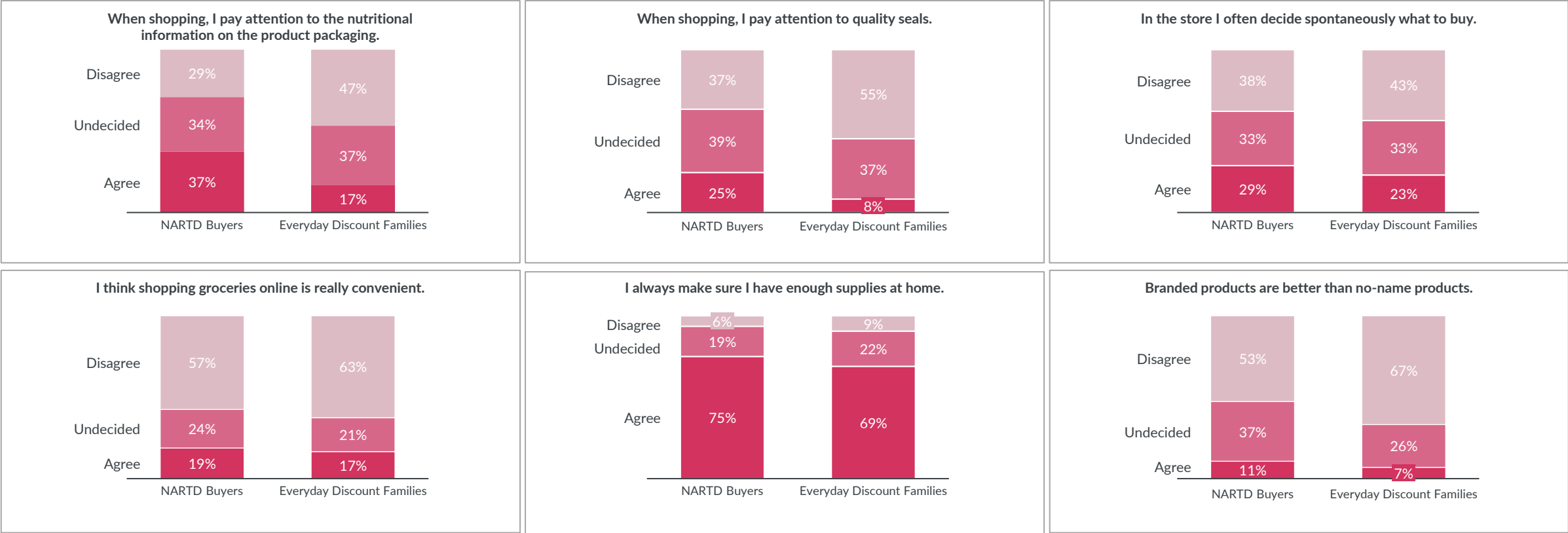
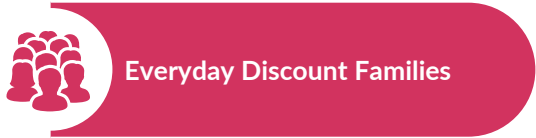


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

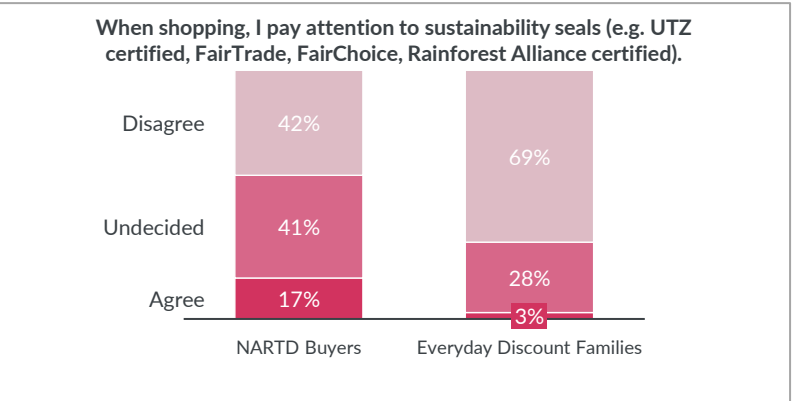
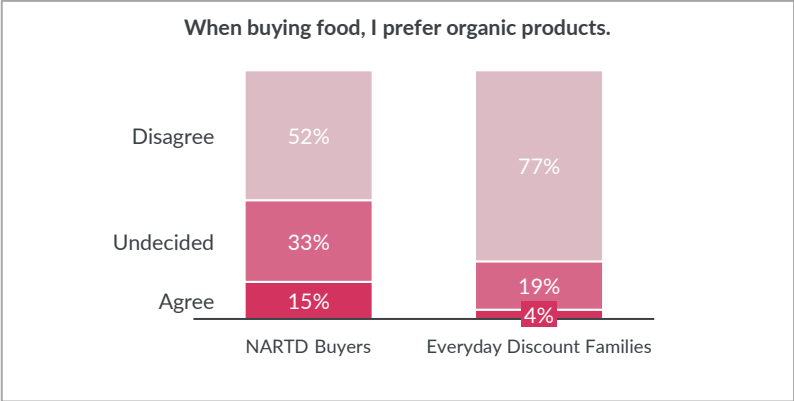
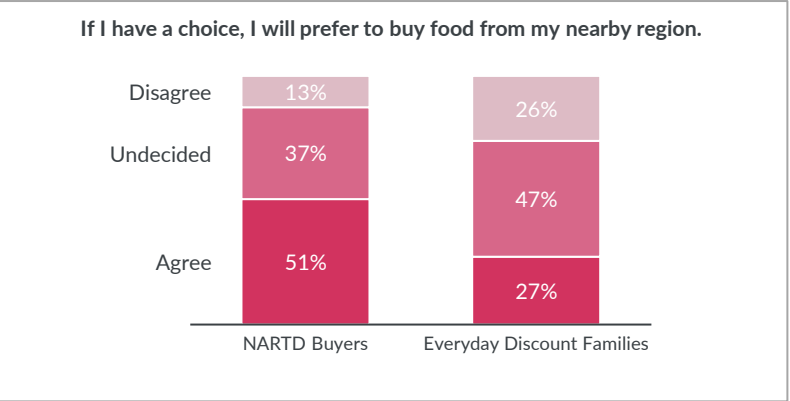
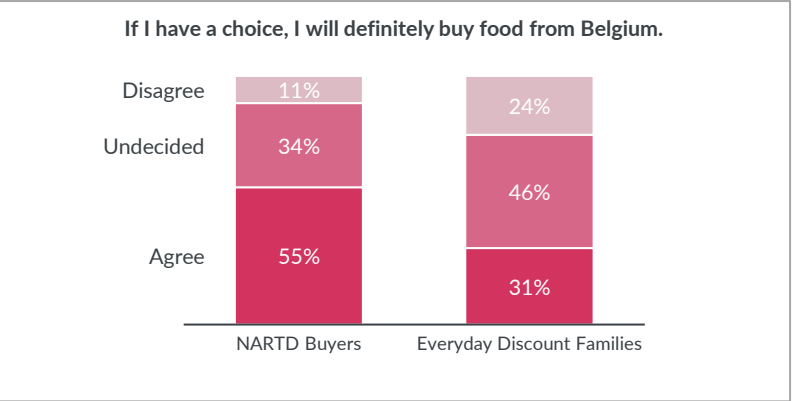
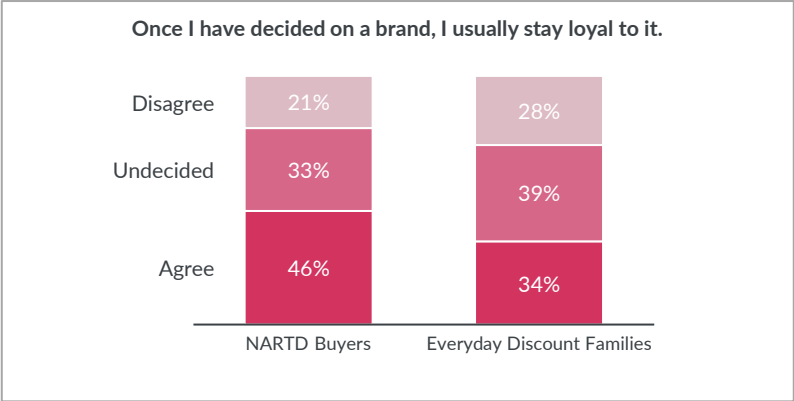
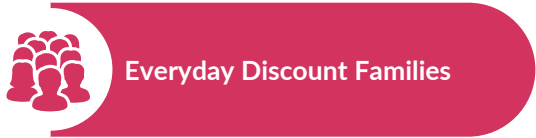


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



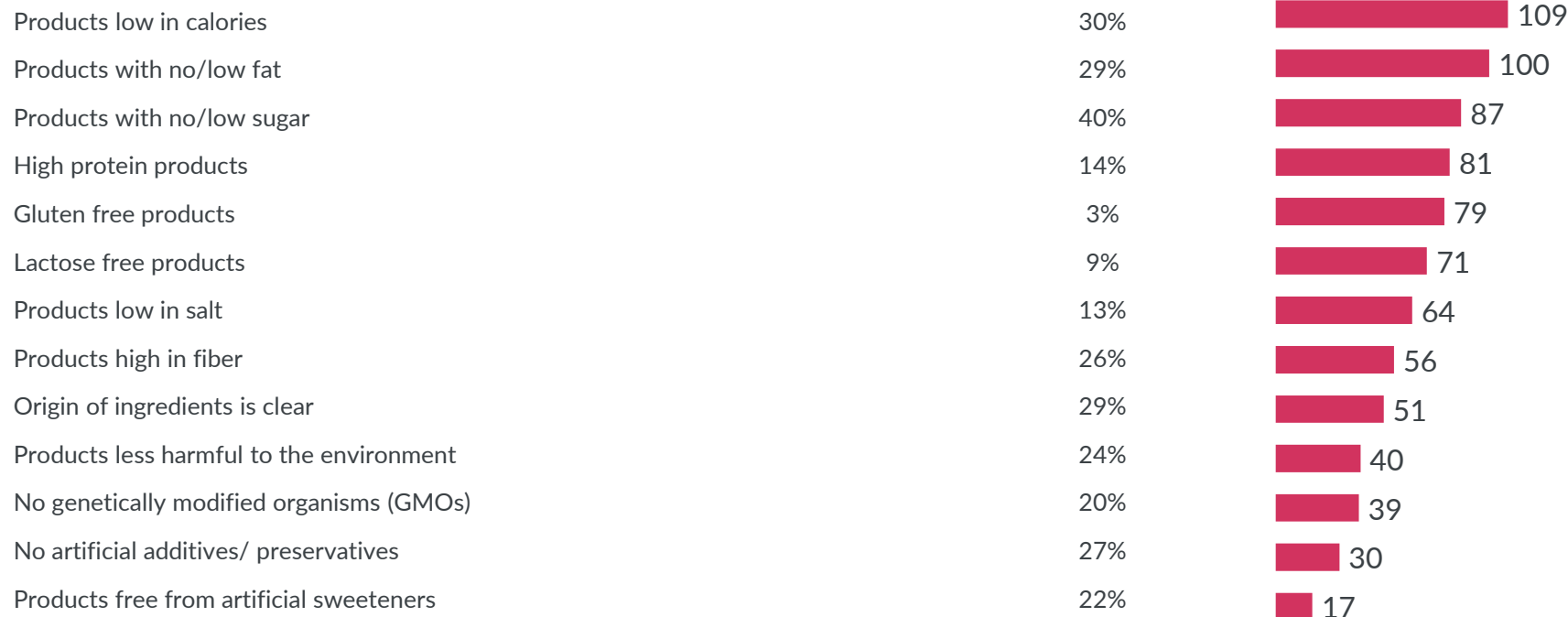
Purchase preferences

What do shoppers consider when they purchase?

5

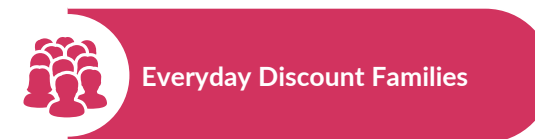


Purchase Preferences



Share of agreement
NARTD Buyers

Index Everyday Discount
Families vs. NARTD Buyers



- the target group pays attention to light/zero products.
- Other nutritional or quality characteristics are subordinate

Purchase preferences

What do shoppers consider when they purchase?

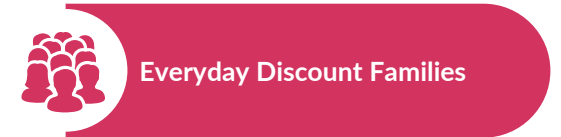


Purchase Preferences

Climate-neutral / carbon-neutral products	8%	100
Products contributing to animal welfare	25%	89
Products without long transport	21%	75
Fairly produced and traded products	24%	74
Products free from palm oil	22%	67
Products which are produced in an environmentally friendly manner	24%	62
Environmentally friendly packaging	37%	51
Products made from natural ingredients	37%	40
Organic / bio products	9%	7

Share of agreement
NARTD Buyers

Index Everyday Discount
Families vs. NARTD Buyers



- the target group does not really care about environmentally, sustainability or bio claims.

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7



Important Features of Retailers

top and flop statements

Attractive private labels	77%	<div></div> 105
Attractive promotions	86%	<div></div> 102
Constant availability of products, no out of stocks	91%	<div></div> 101
Easy to reach by car, availability of parking lot	80%	<div></div> 100
Overall fair prices	95%	<div></div> 100
Wide range of well-known brands	46%	<div></div> 69
Retailer helps me to make healthy choices	48%	<div></div> 58
Availability of local/regional products	42%	<div></div> 50
Social & environmental responsibility	53%	<div></div> 50
Attractive organic assortment	22%	<div></div> 26

Share of agreement Index Everyday Discount Families vs. NARTD Buyers
NARTD Buyers



Everyday Discount Families

- The target group is promo & price oriented and prefers private label over A-brands.
- They do not really care about environmentally, sustainability or bio claims.

Important Features of Retailers

Criteria for choosing a retailer

7

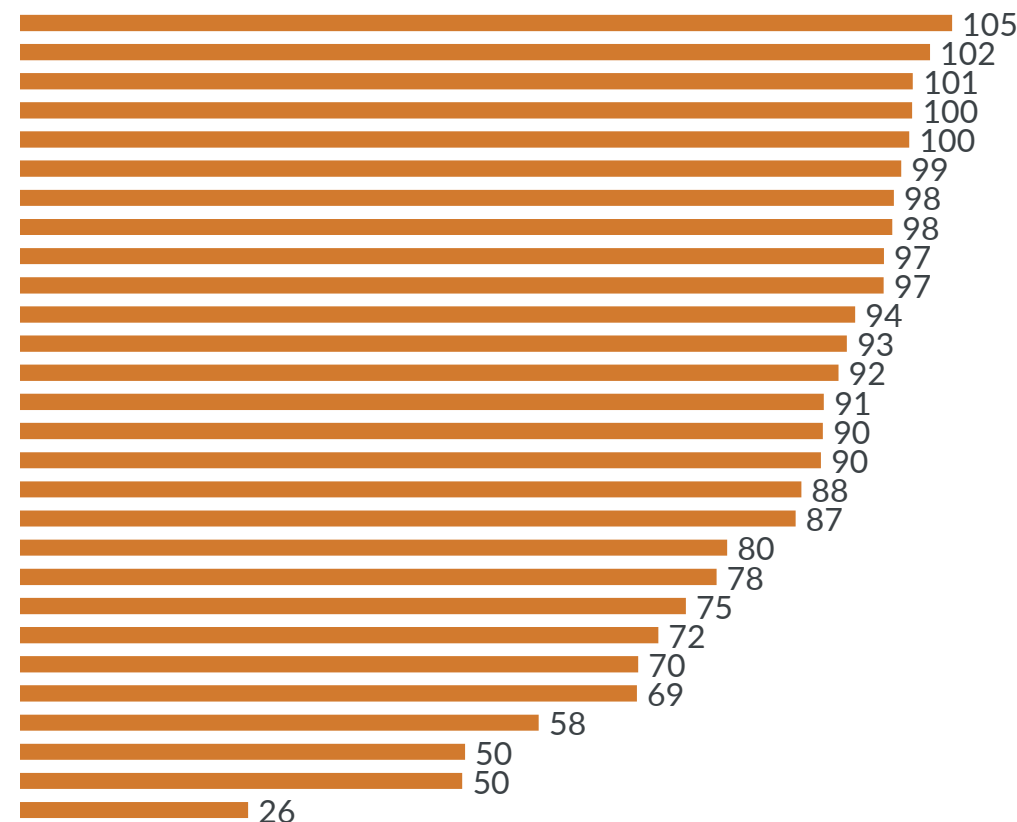


Important Features of Retailers



Everyday Discount Families

Attractive private labels	77%
Attractive promotions	86%
Constant availability of products, no out of stocks	91%
Easy to reach by car, availability of parking lot	80%
Overall fair prices	95%
Good fresh department	92%
Quick service / short waiting time at the checkout	70%
Easy to find products on shelves	83%
Close to home/ workplace	73%
Broad assortment, wide range of products	86%
Convenient opening hours	77%
Clean and tidy store	90%
Clear store layout / easy navigation	74%
Friendly, well-trained staff	88%
High quality of products	76%
Loyalty card / loyalty program	64%
Nice, pleasant atmosphere	62%
Large variety in pack sizes to meet my needs	66%
Offers a delivery service	12%
Retailer tries to reduce food waste	69%
Possibility for self-scanning / self-checkout	27%
Offer of ready-to-go / ready-to-eat products and meals	17%
Retailer contributes to plastic reduction/ avoidance	66%
Wide range of well-known brands	46%
Retailer helps me to make healthy choices	48%
Availability of local/regional products	42%
Social & environmental responsibility	53%
Attractive organic assortment	22%



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

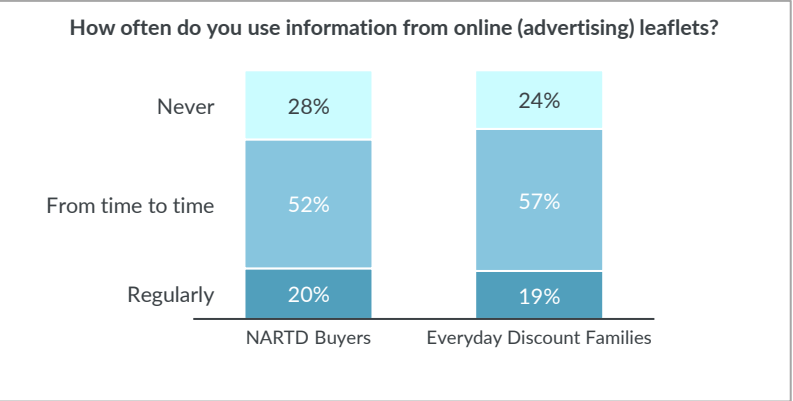
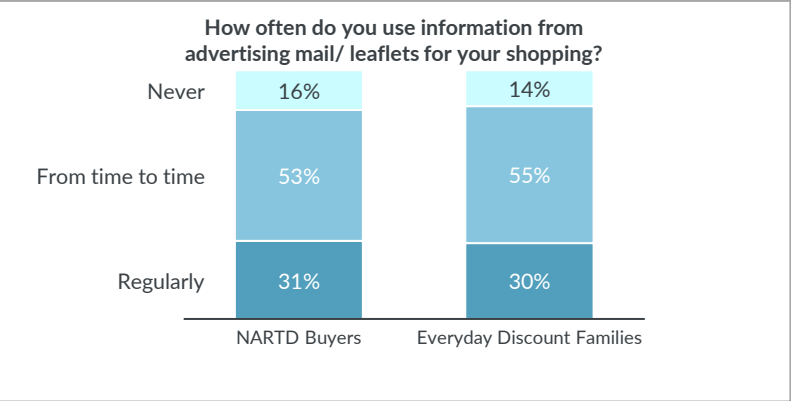
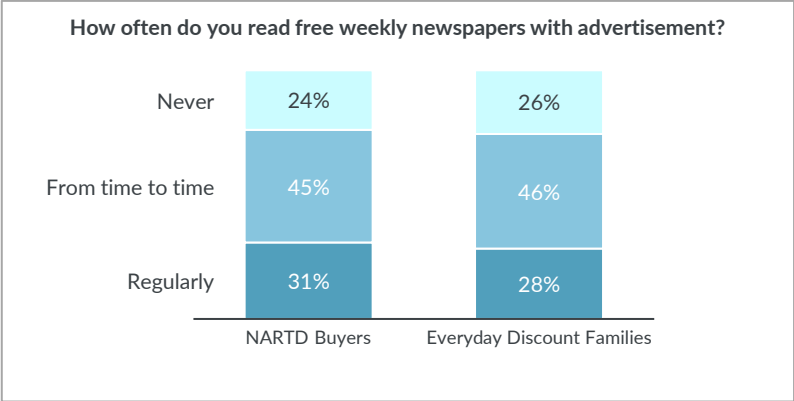
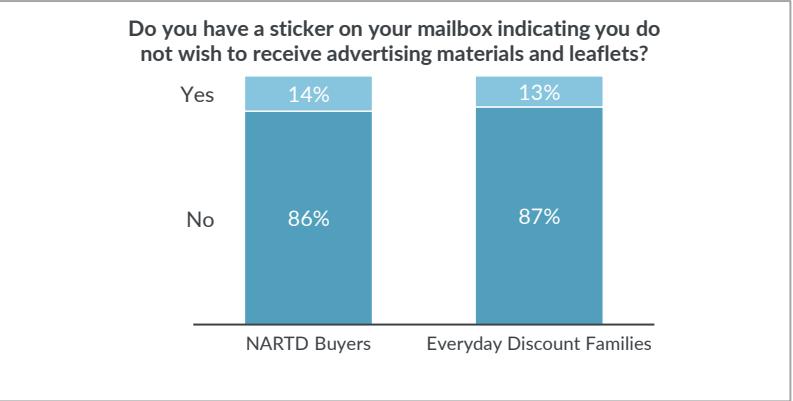
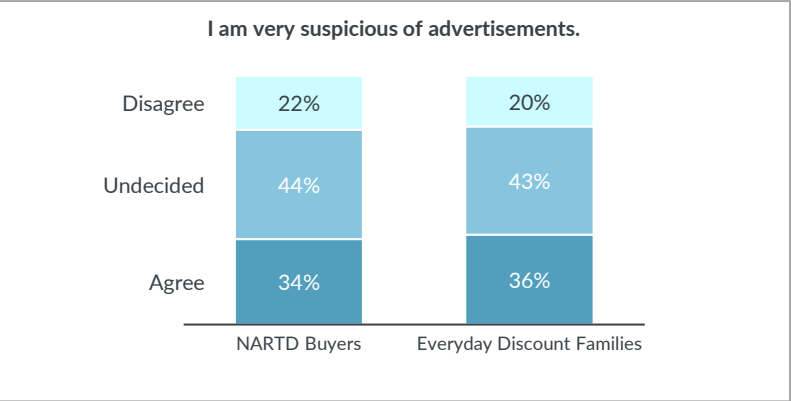
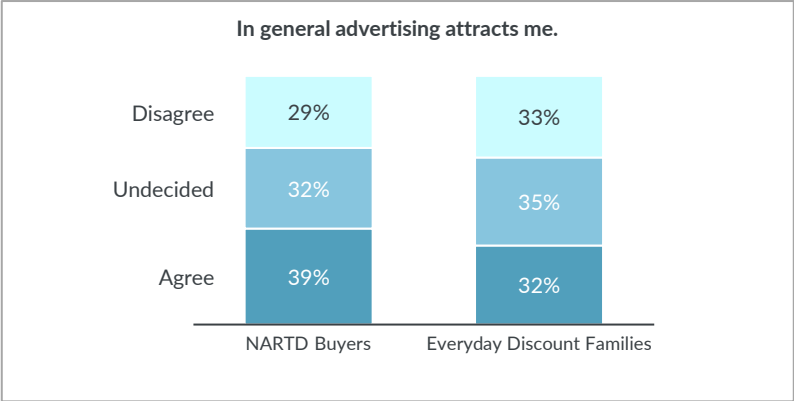
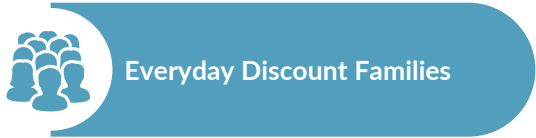


Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



Media behavior & Advertising usage

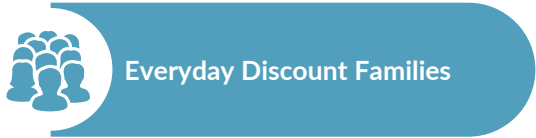


Media behavior & Advertising usage

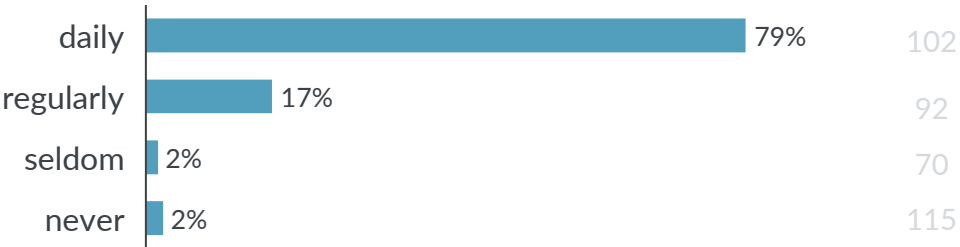
Attitudes and receptivity to media and advertising



Media behavior & Advertising usage



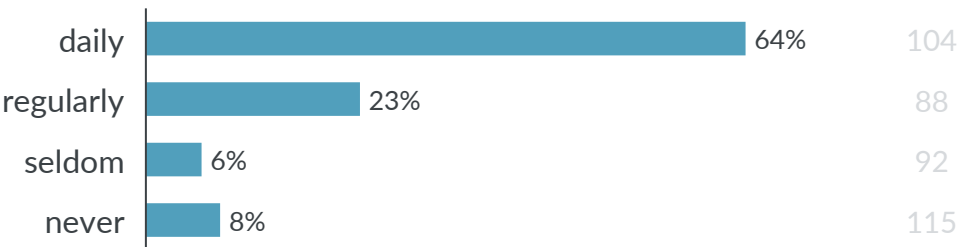
How often are you watching tv



How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines

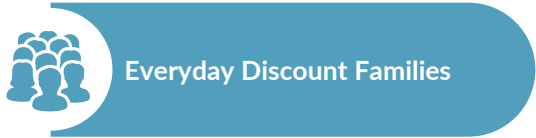


Media behavior & Advertising usage

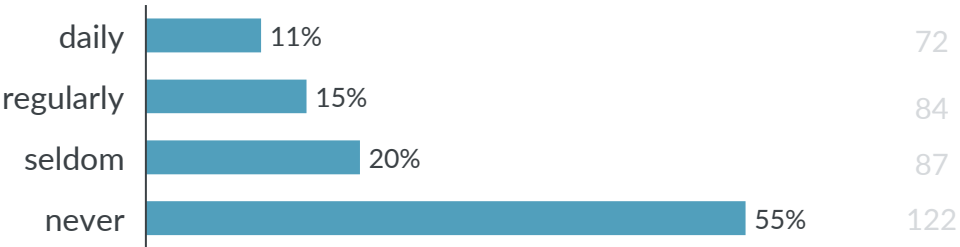
Attitudes and receptivity to media and advertising



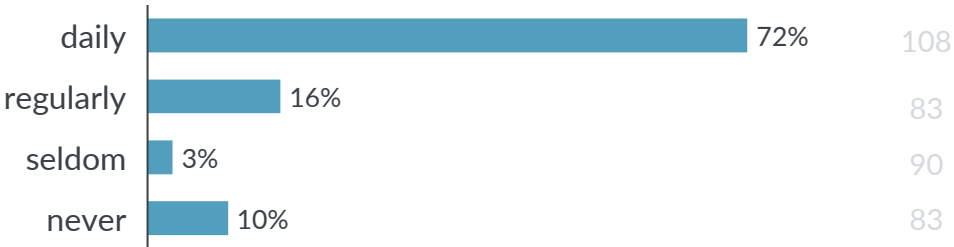
Media behavior & Advertising usage



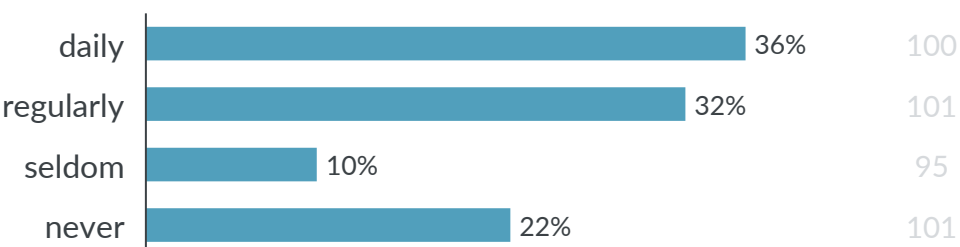
How often are you reading (printed) newspapers



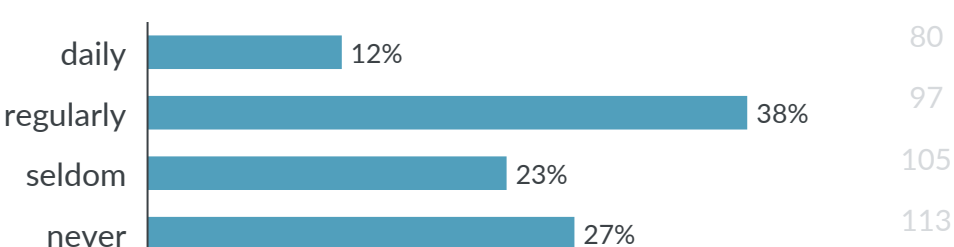
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)



Media behavior & Advertising usage

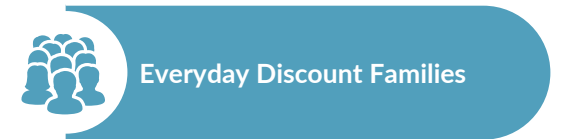
Attitudes and receptivity to media and advertising



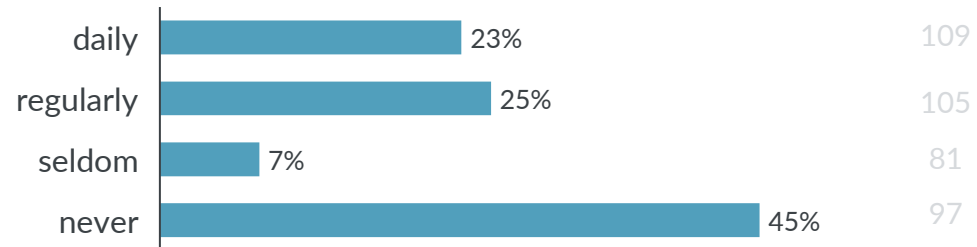
8



Media behavior & Advertising usage



How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



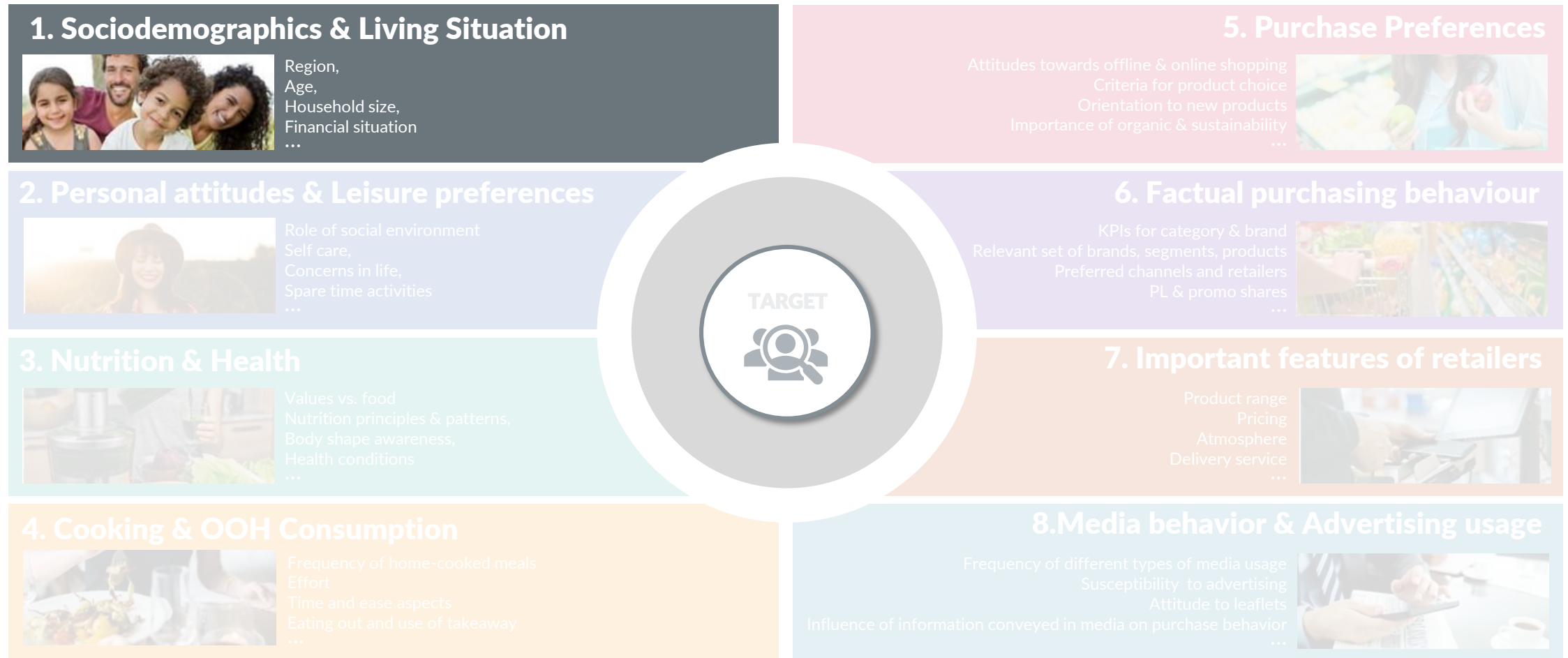
Surfing the internet (otherwise)



02

Older, Wealthy Routineers

Chapter 1: Sociodemographics & Living Situation



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

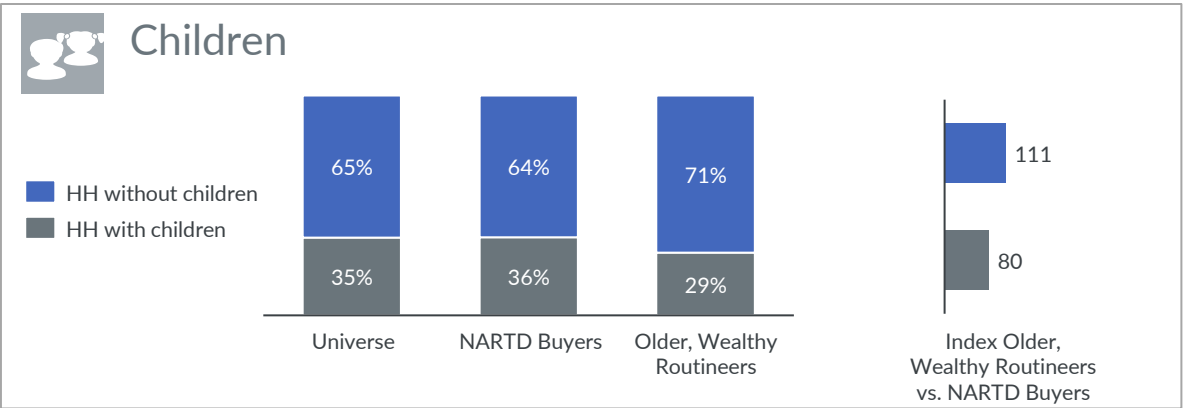
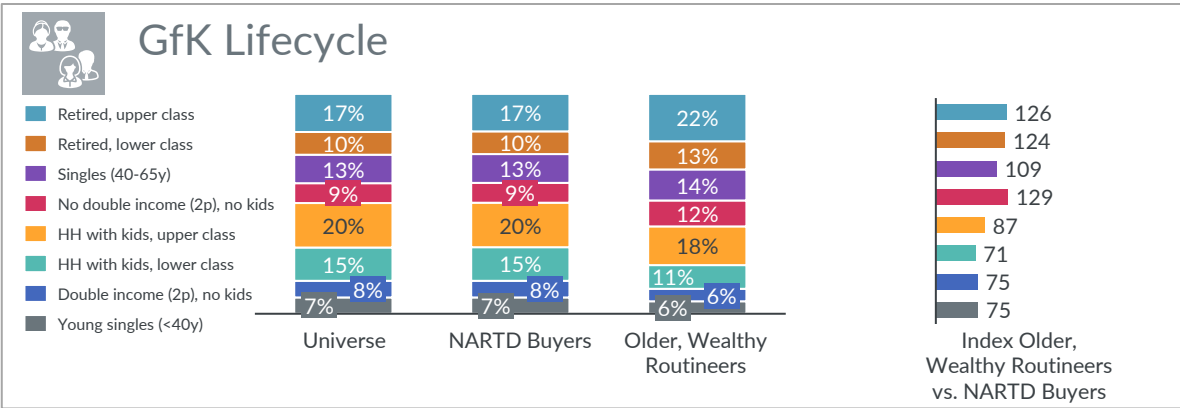
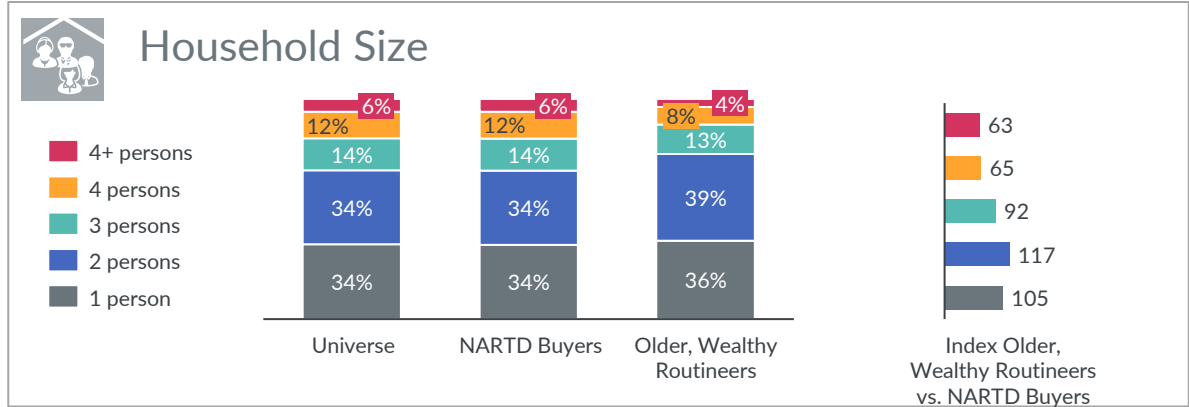
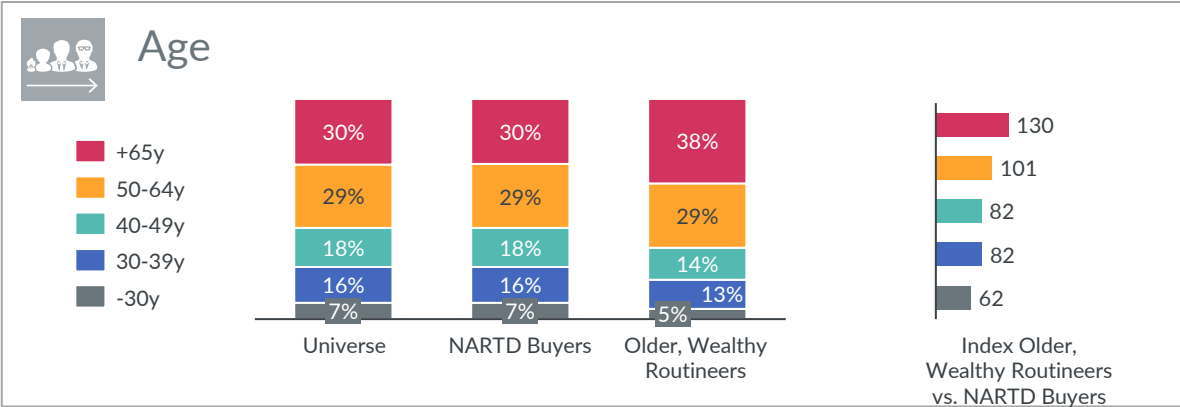


1



Sociodemographics & Living Situation

Older, Wealthy Routineers



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1

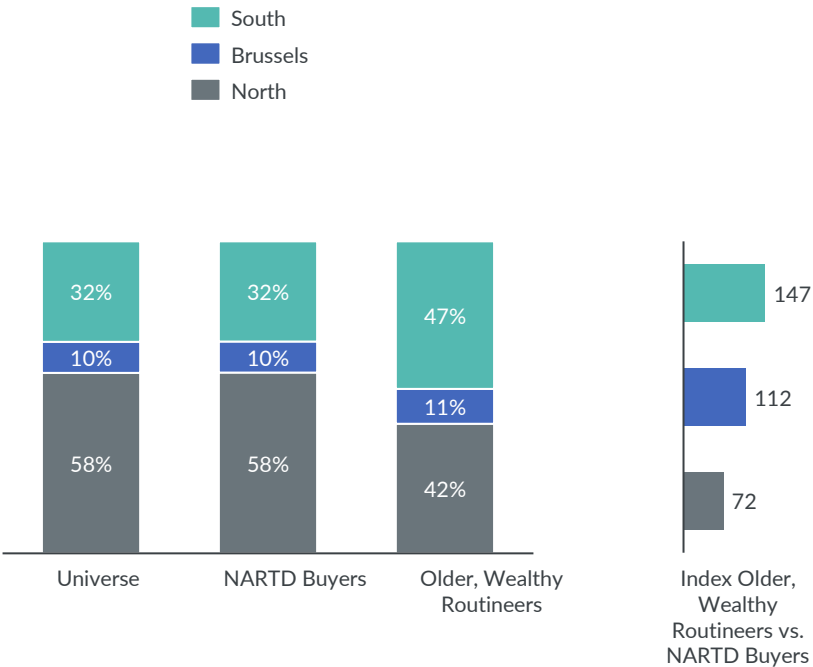


Sociodemographics & Region

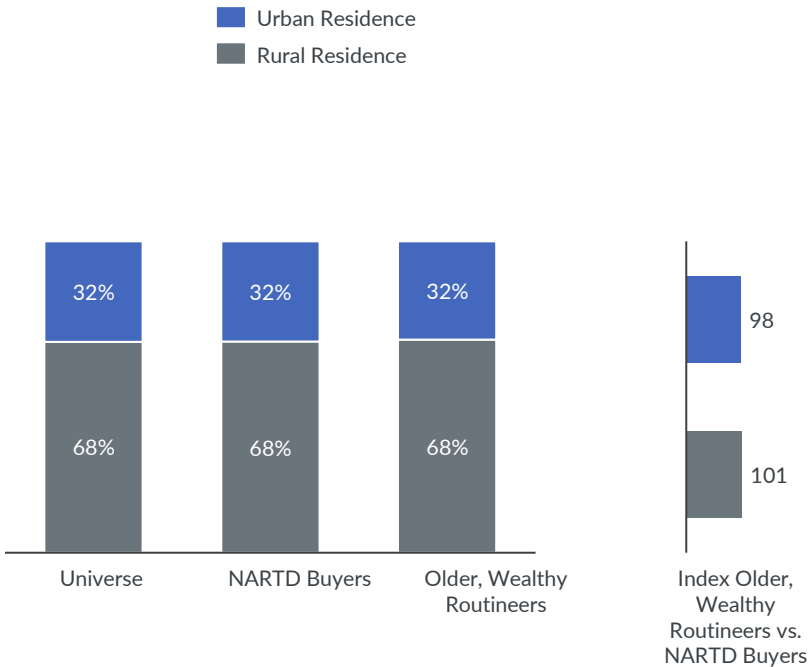
Older, Wealthy Routineers



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



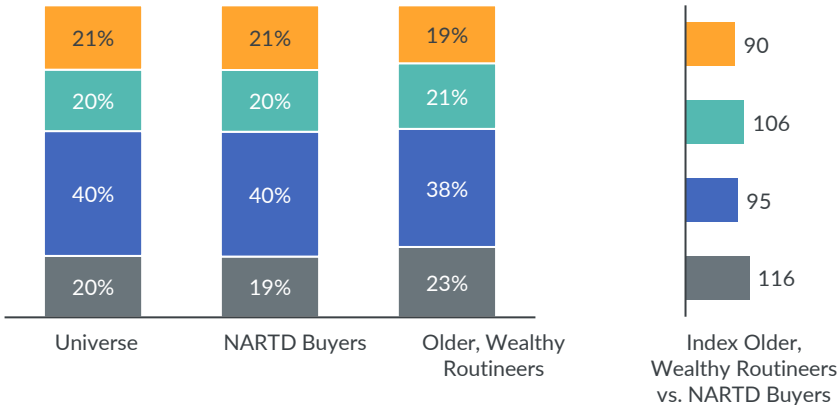
Sociodemographics & Financial Situation

Older, Wealthy Routineers



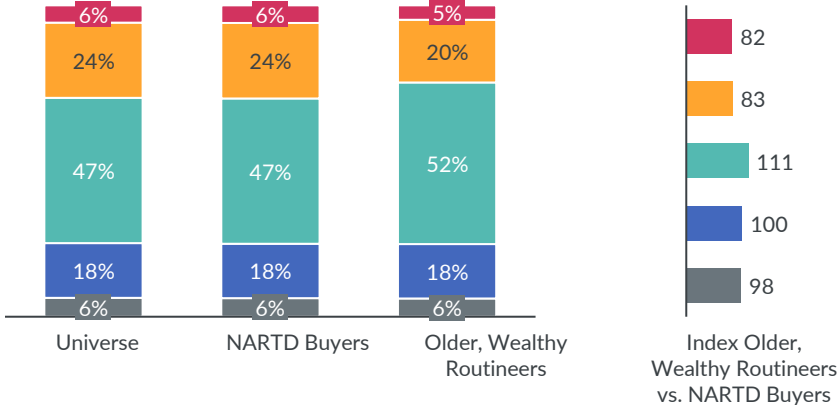
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



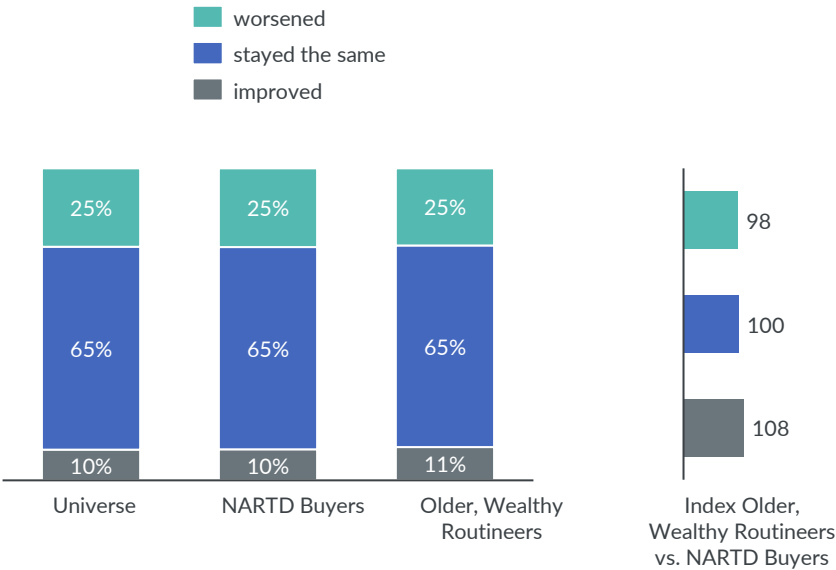
Sociodemographics & Financial Situation

Older, Wealthy Routineers



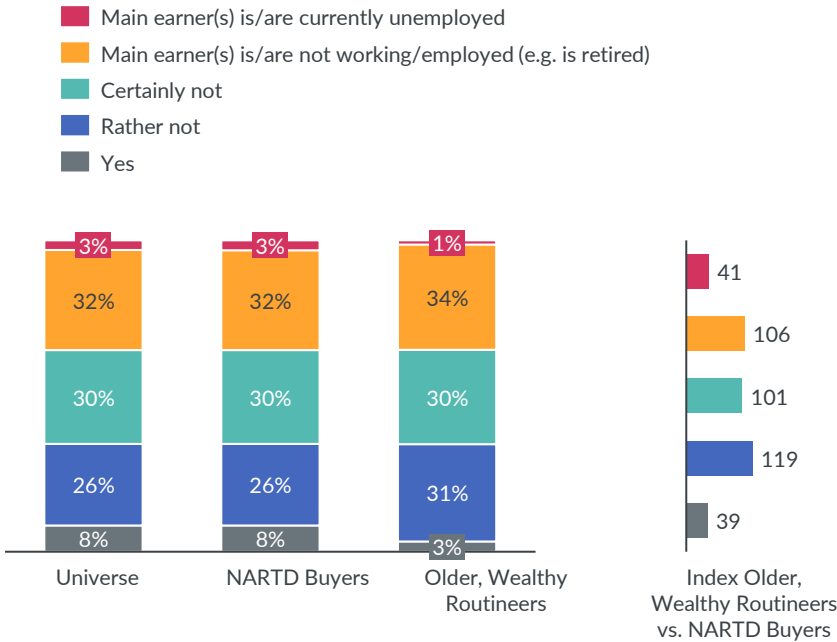
Future Financial Situation

Do you think that in 12 months your financial situation will have



Employment

Could the employment of the main earner(s) in your household be at risk?



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences

top and flop statements



Older, Wealthy Routineers

Meditating, praying, going to church	4%	223
Going to clubs/ nightclubs	2%	121
Doing sports	24%	118
Going to restaurants	35%	117
Cooking for pleasure	29%	115
Volunteering/ getting involved in activities of civil society organizations	14%	89
Going to Spa/Sauna (wellness activities)	14%	84
Watching TV/ movies	13%	82
Spending time with animals	24%	76
Doing handicrafts/needlework	18%	71

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers

- Leisure activities of the target group in focus are very out of home oriented.
- The target group is very into spirituality.
- “Classic” activities at home are not favorable

Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

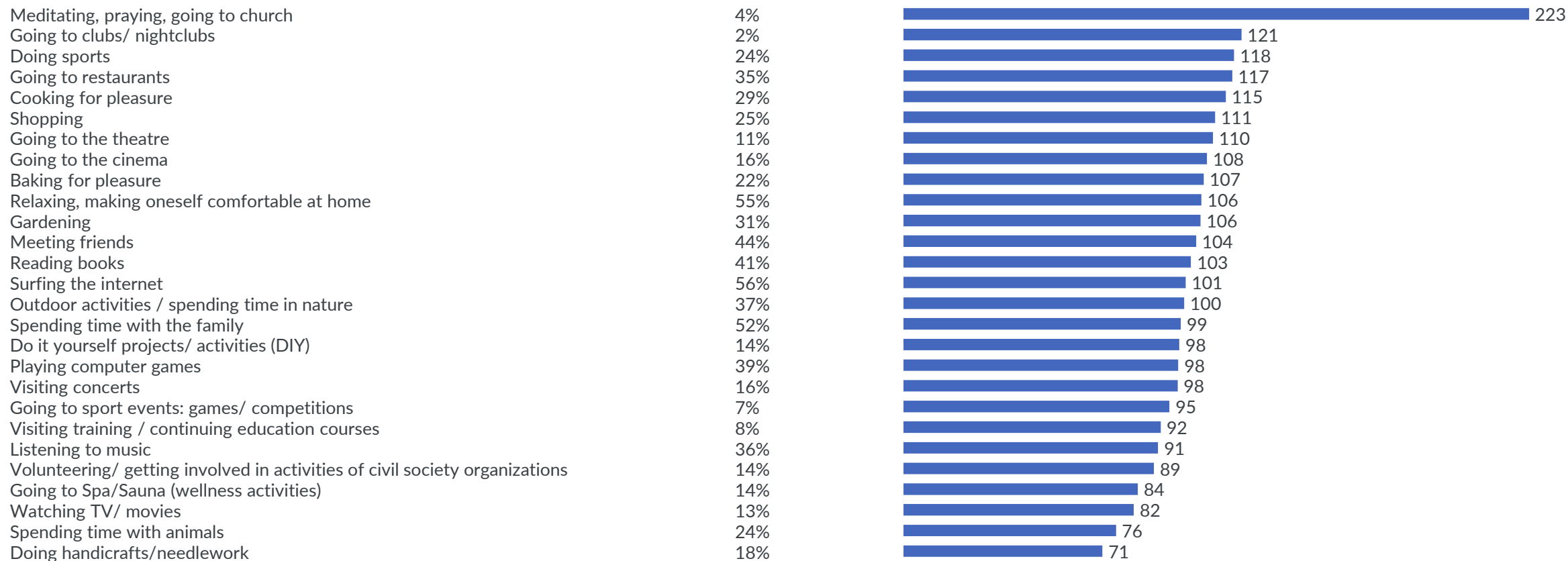
2



Personal attitudes & Leisure preferences



Older, Wealthy Routineers

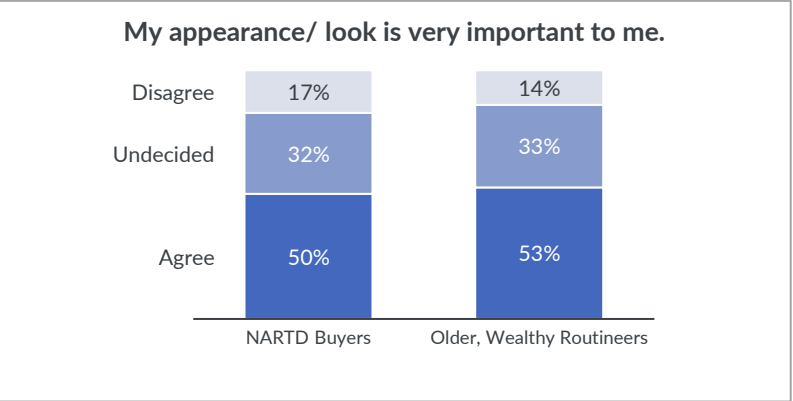
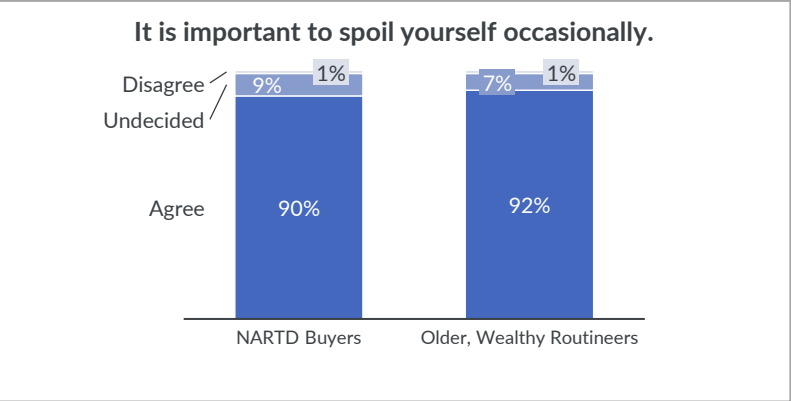
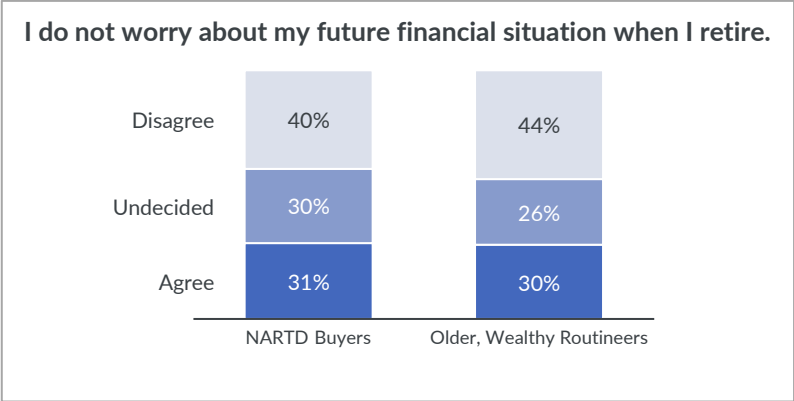
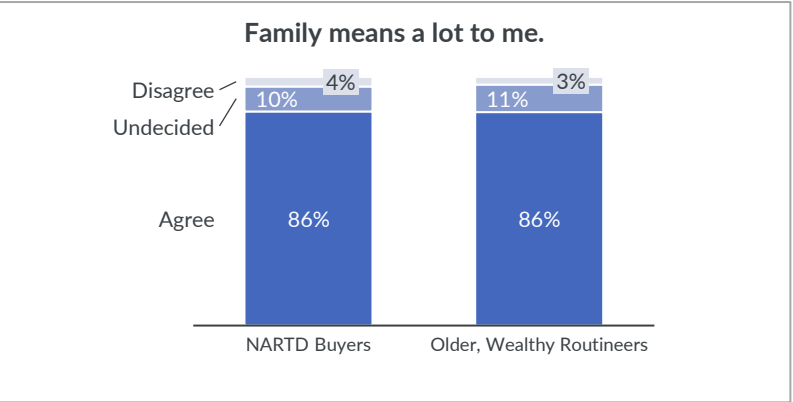
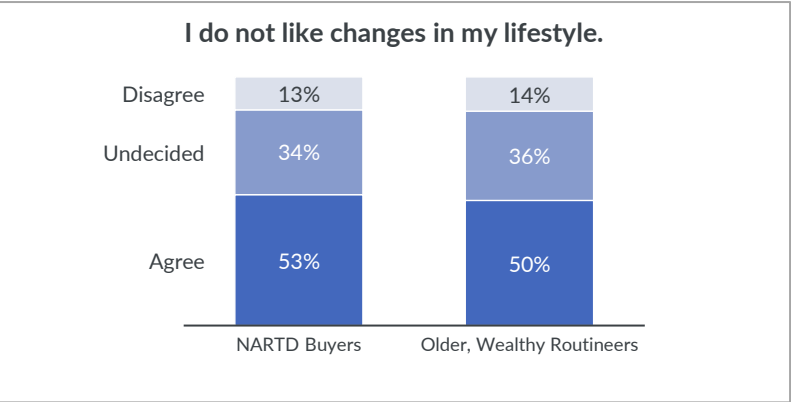
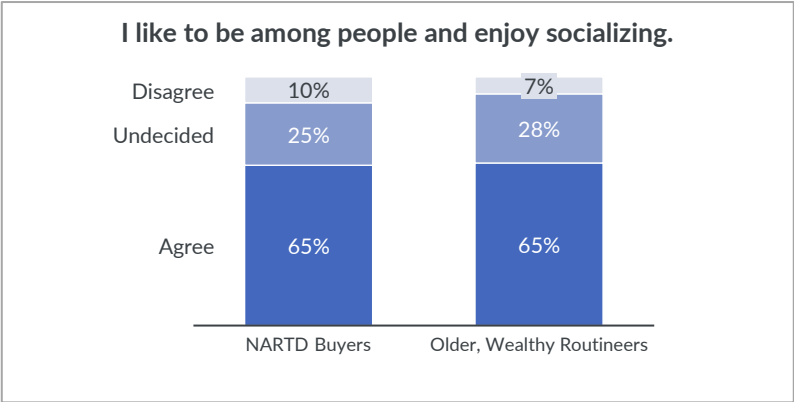


Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences

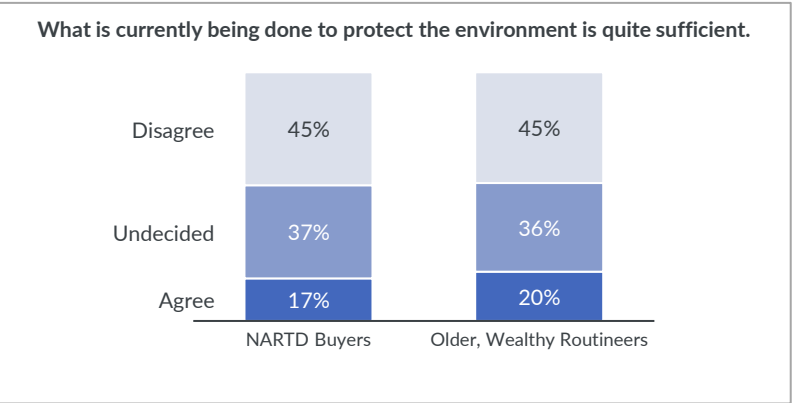
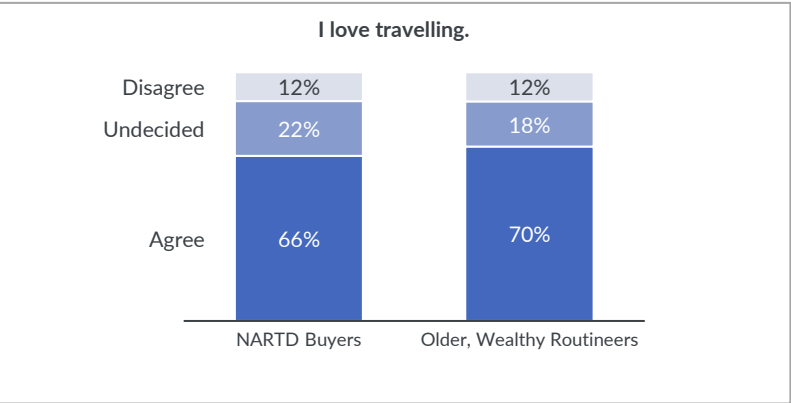
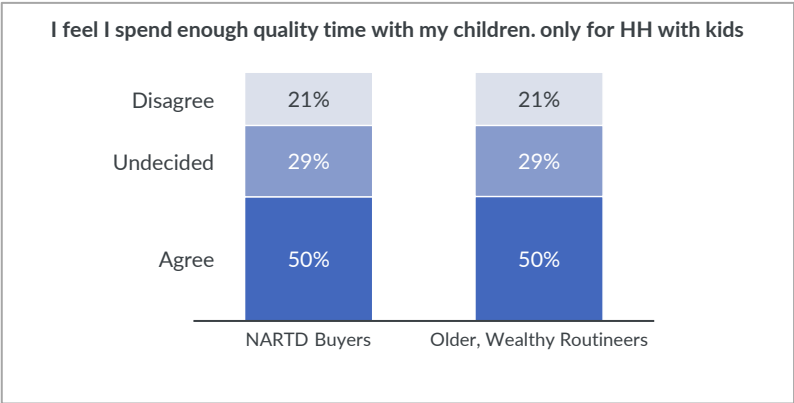
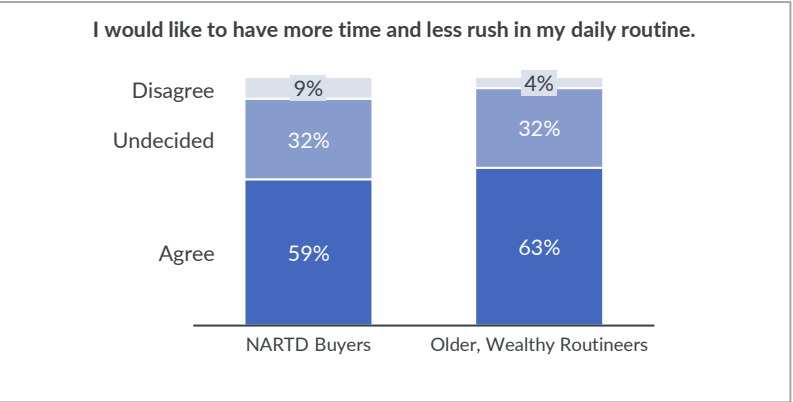
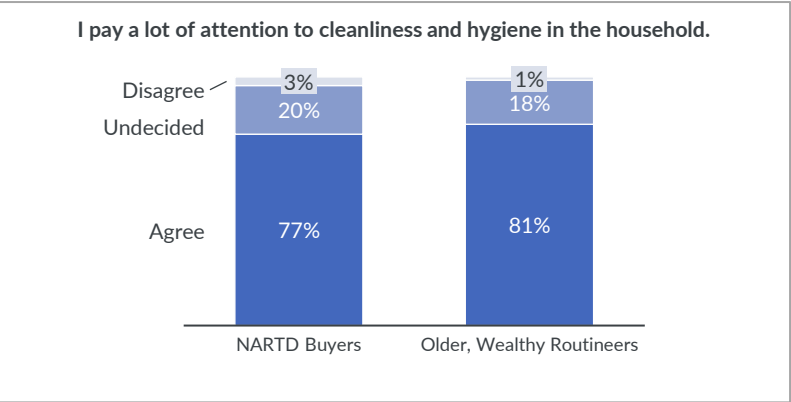
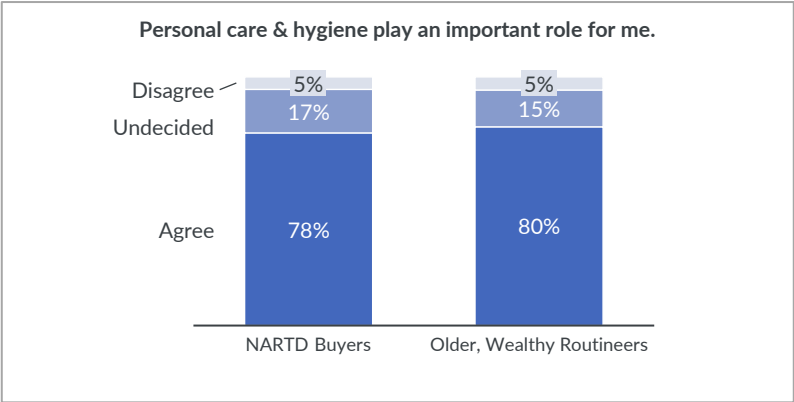
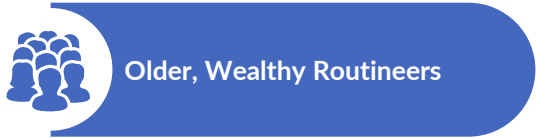


Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

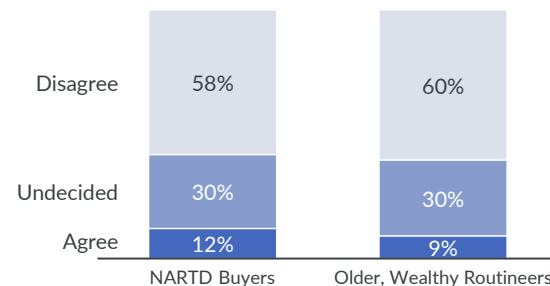


Personal attitudes & Leisure preferences



Older, Wealthy Routineers

I often have newly launched products faster than my friends.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



Older, Wealthy Routineers

● NARTD Buyers

● Older, Wealthy Routineers

Enjoying life in the here and now					Thinking about tomorrow
Buying what you like					Buying what is necessary
Being careful					Daring something/ taking risk
Living an active exciting life					Living a quiet, secluded life
Shopping for groceries is fun					Shopping groceries is annoying
I like to buy things that nobody else has					I don't care if others have the same products
When shopping, I pay particular attention to price					When shopping, I pay particular attention to quality

I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

I consciously pay attention to a healthy diet.	59%	<div></div> 120
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 113
I exercise regularly to stay fit.	50%	<div></div> 112
When eating and drinking I watch my figure.	46%	<div></div> 109
I take care of my inner, mental health/balance.	54%	<div></div> 107
I like to spoil myself with good food.	83%	<div></div> 104
I do a lot for my health.	48%	<div></div> 102
I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 83

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



Older, Wealthy Routineers

- The focus target group pays attention to a healthy diet.
- Slimness orientation and figure awareness are "top of mind" in the target group.

Nutrition & Health

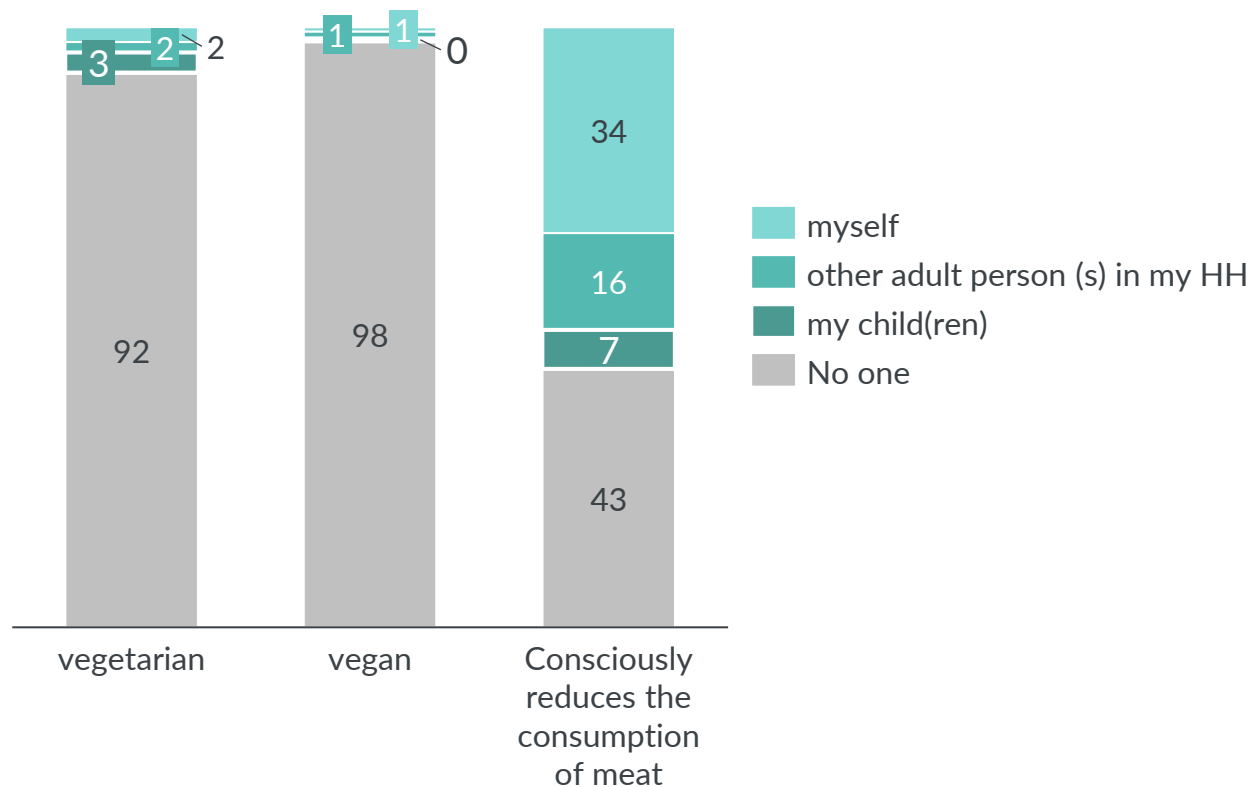
Special Nutrition patterns

3



Nutrition & Health

Share of different nutrition styles in the households



Older, Wealthy Routineers

- The focus target group pays attention to their meat consumption, but abstains from a purely plant-based diet

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

Coeliac disease (gluten intolerance)	2%	157
I prefer not to answer	3%	156
Skin problems	6%	124
High blood pressure	10%	115
High cholesterol level	13%	101
No, relevant health conditions with impact on shopping behavior	60%	101
Lactose intolerance	7%	85
Diabetes	10%	84
Other allergies or intolerances	9%	79
Others, not mentioned here	4%	66

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers



Older, Wealthy Routineers

- The focus target group has comparatively more health problems.
- Gluten intolerance is more common in the target group.

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption

4



Cooking & OOH Consumption

I love to cook fancy/exceptional dishes and meals.	19%	110
I often order takeaway food, delivered at home or for pick up).	7%	109
At home we cook hot meals every day/very often.	82%	104
I like to cook.	60%	103
I often eat out (canteen, cafe, restaurant, etc.).	13%	95
The easier the cooking, the more I like it.	45%	90
I prefer to cook meals that do not take a lot of time to prepare.	46%	87
I often eat quickly and 'on the go'.	10%	84
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	76

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers



Older, Wealthy Routineers

- the target group likes to cook (fancy meals) at home and also does so regularly.
- Also takeaway food is top of mind.
- The use of convenience products and eating 'on the go' play a rather subordinate role

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

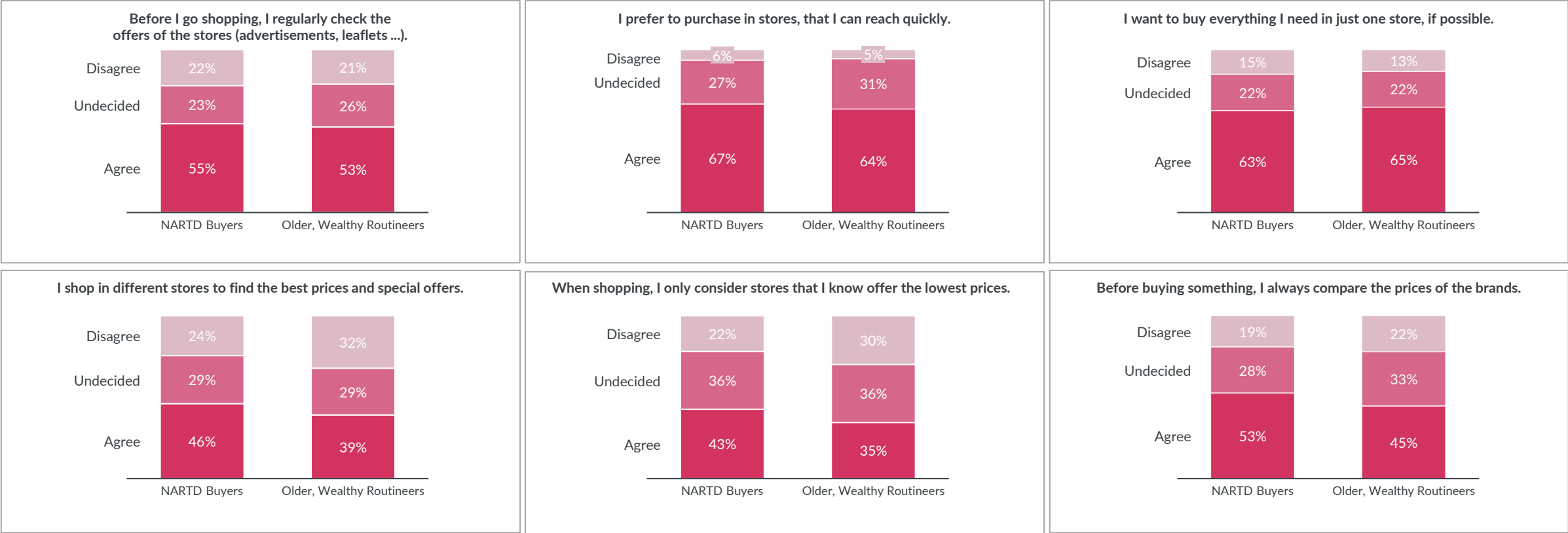


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

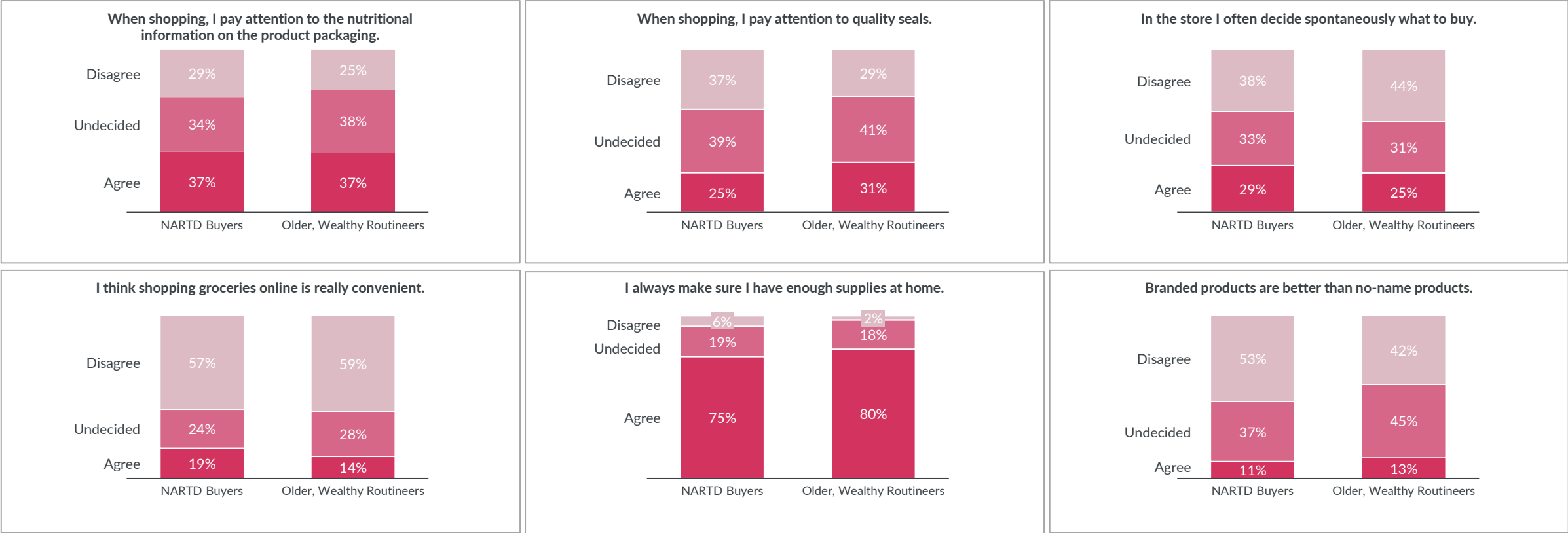


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

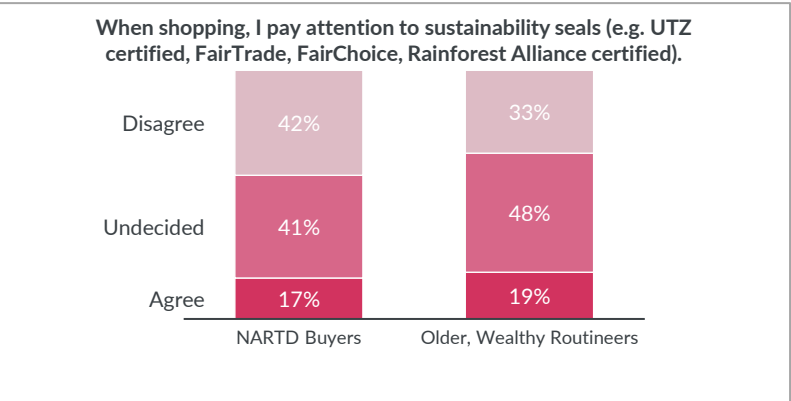
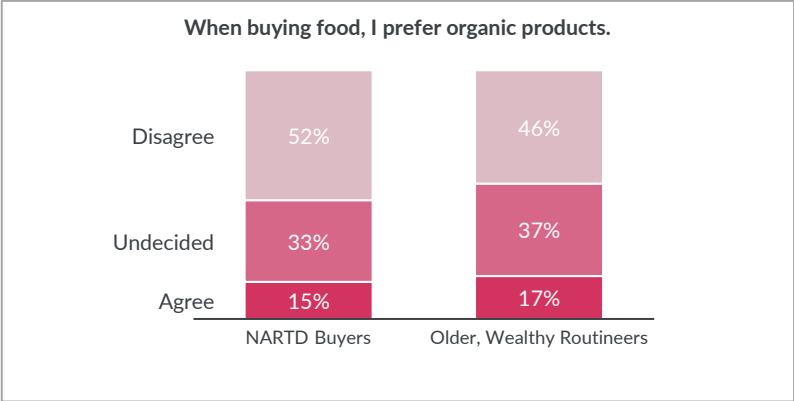
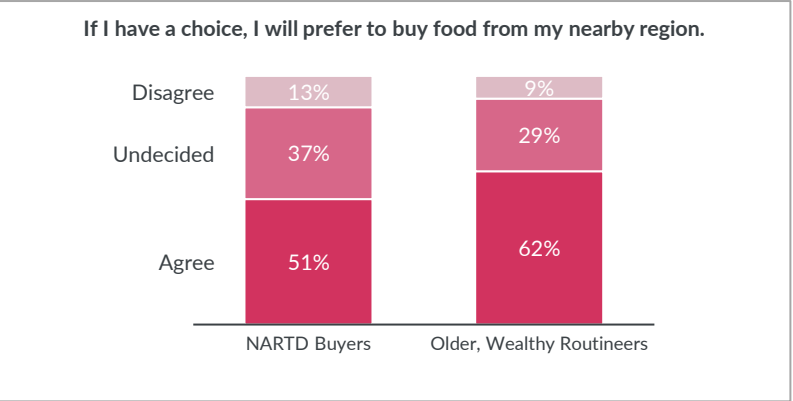
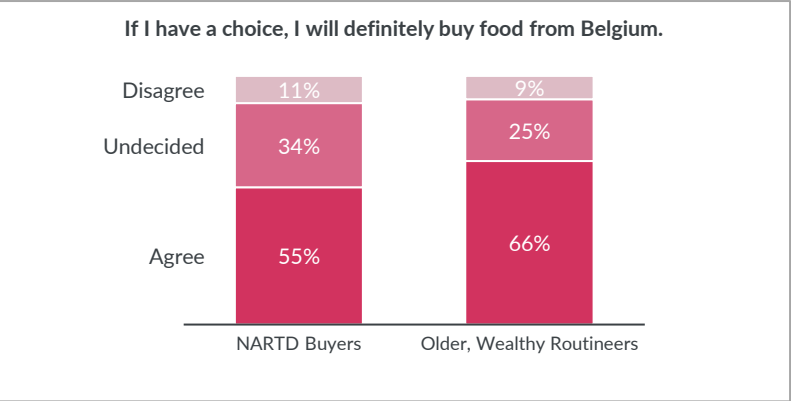
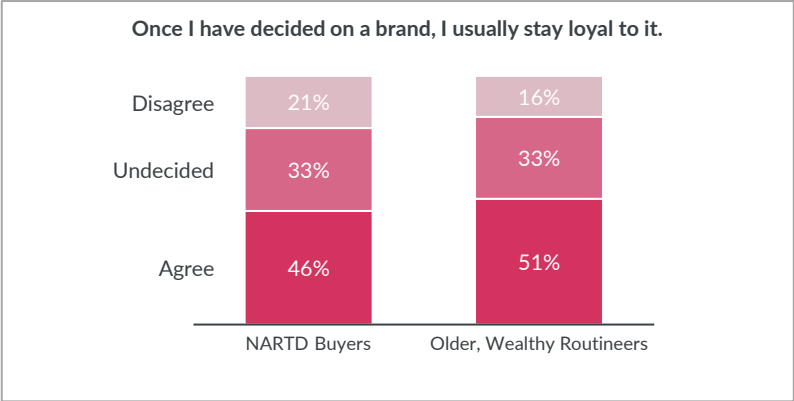


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



Purchase preferences

What do shoppers consider when they purchase?

5



Purchase Preferences

Products free from artificial sweeteners	22%	137
No genetically modified organisms (GMOs)	20%	135
Products low in salt	13%	129
No artificial additives/ preservatives	27%	126
Origin of ingredients is clear	29%	121
High protein products	14%	120
Products less harmful to the environment	24%	120
Products high in fiber	26%	107
Gluten free products	3%	106
Products with no/low fat	29%	101
Products with no/low sugar	40%	99
Products low in calories	30%	88
Lactose free products	9%	81

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers



Older, Wealthy Routineers

- the target group likes natural, artificial free & healthy products.
- They are not fond of light/zero or lactose free products.

Purchase preferences

What do shoppers consider when they purchase?

5

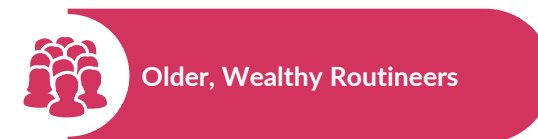


Purchase Preferences

Organic / bio products	9%	142
Products free from palm oil	22%	128
Products made from natural ingredients	37%	122
Climate-neutral / carbon-neutral products	8%	108
Products which are produced in an environmentally friendly manner	24%	107
Products without long transport	21%	106
Environmentally friendly packaging	37%	102
Products contributing to animal welfare	25%	101
Fairly produced and traded products	24%	94

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers



- The target group prefers organic & climate friendly products.
- Fair trade is subordinate for this group.

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7



Important Features of Retailers

top and flop statements

Attractive organic assortment	22%	124
Wide range of well-known brands	46%	119
Availability of local/regional products	42%	114
Offer of ready-to-go / ready-to-eat products and meals	17%	111
Nice, pleasant atmosphere	62%	110
Overall fair prices	95%	95
Convenient opening hours	77%	95
Possibility for self-scanning / self-checkout	27%	92
Attractive private labels	77%	92
Quick service / short waiting time at the checkout	70%	91

Share of agreement
NARTD Buyers

Index Older, Wealthy
Routineers vs. NARTD Buyers



Older, Wealthy Routineers

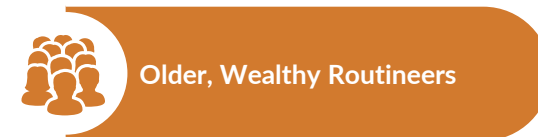
- The target group prefers a organic & local assortment & a nice atmosphere in the retailer.
- They do not really care about price, checkout service or convenient hours.

Important Features of Retailers

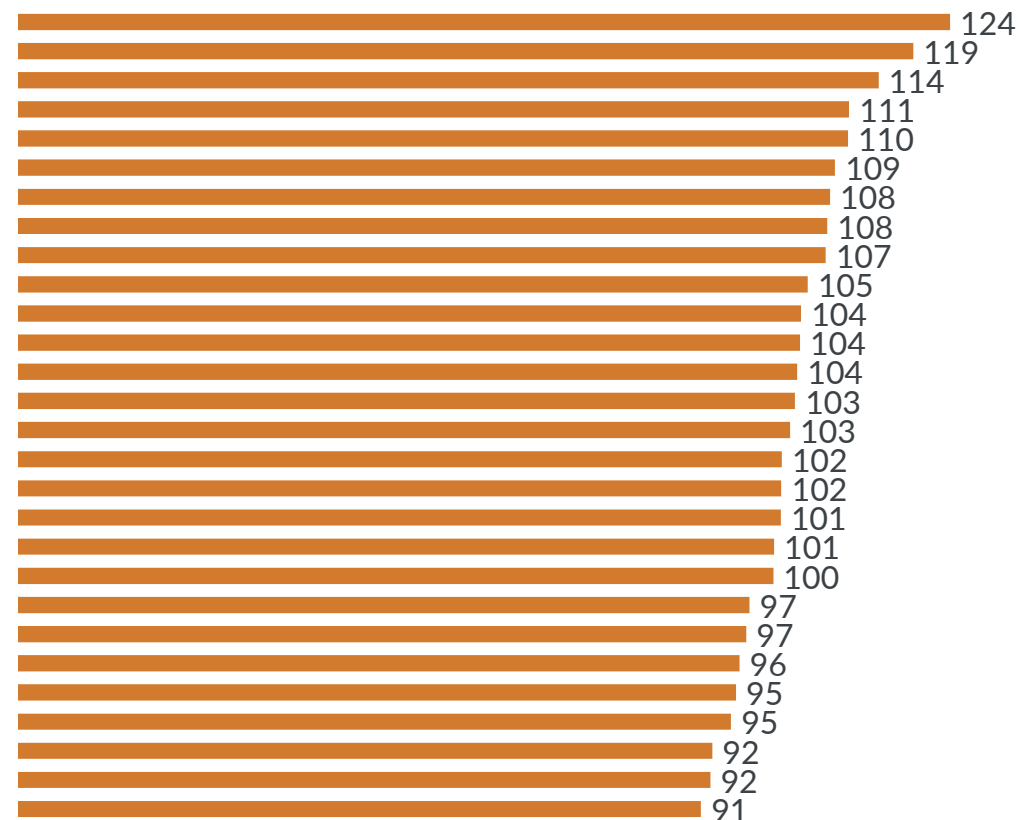
Criteria for choosing a retailer



Important Features of Retailers



Attractive organic assortment	22%
Wide range of well-known brands	46%
Availability of local/regional products	42%
Offer of ready-to-go / ready-to-eat products and meals	17%
Nice, pleasant atmosphere	62%
Retailer helps me to make healthy choices	48%
Social & environmental responsibility	53%
Clear store layout / easy navigation	74%
Large variety in pack sizes to meet my needs	66%
Retailer contributes to plastic reduction/ avoidance	66%
Easy to find products on shelves	83%
Clean and tidy store	90%
Retailer tries to reduce food waste	69%
Easy to reach by car, availability of parking lot	80%
Friendly, well-trained staff	88%
Constant availability of products, no out of stocks	91%
Loyalty card / loyalty program	64%
Good fresh department	92%
Broad assortment, wide range of products	86%
Offers a delivery service	12%
High quality of products	76%
Close to home/ workplace	73%
Attractive promotions	86%
Overall fair prices	95%
Convenient opening hours	77%
Possibility for self-scanning / self-checkout	27%
Attractive private labels	77%
Quick service / short waiting time at the checkout	70%



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

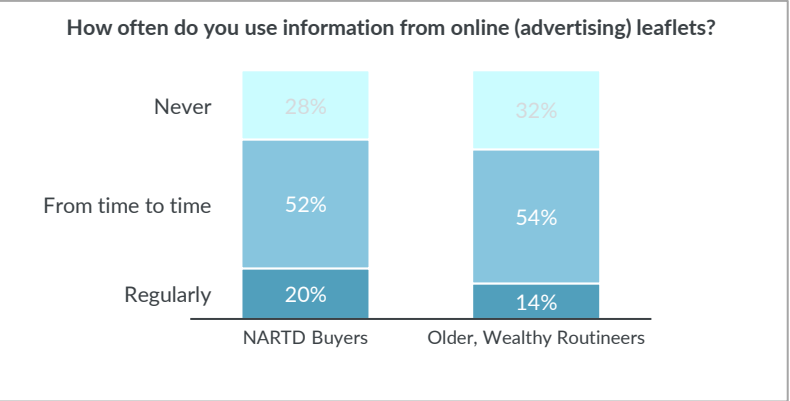
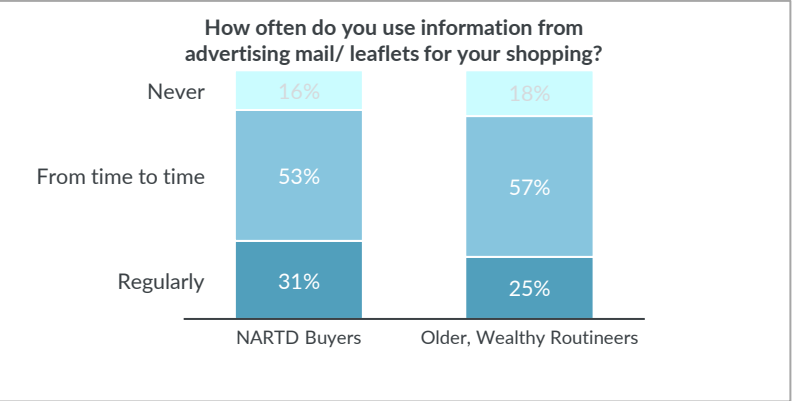
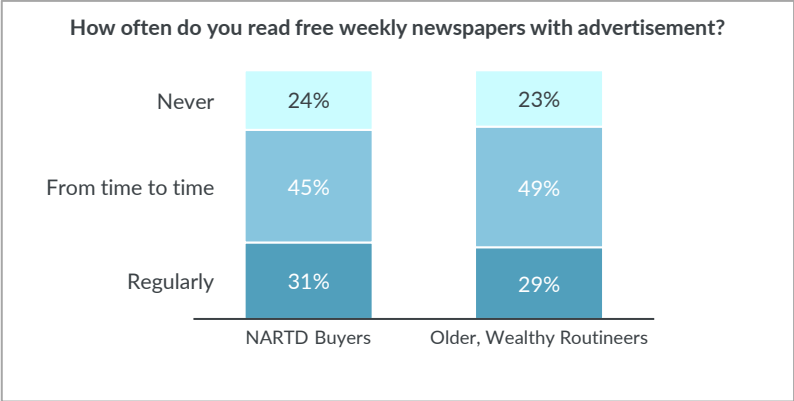
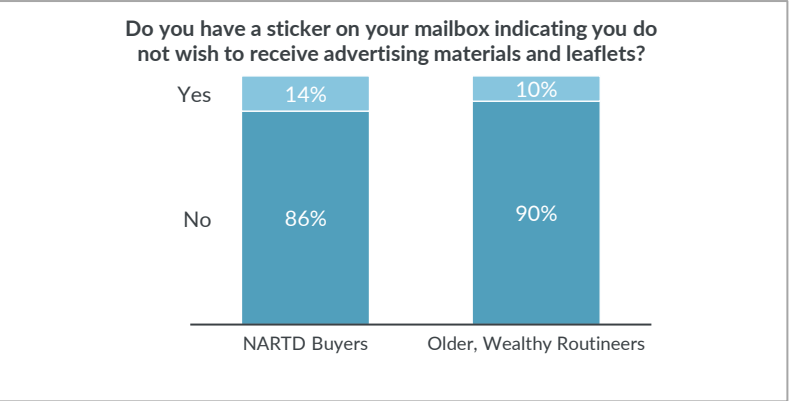
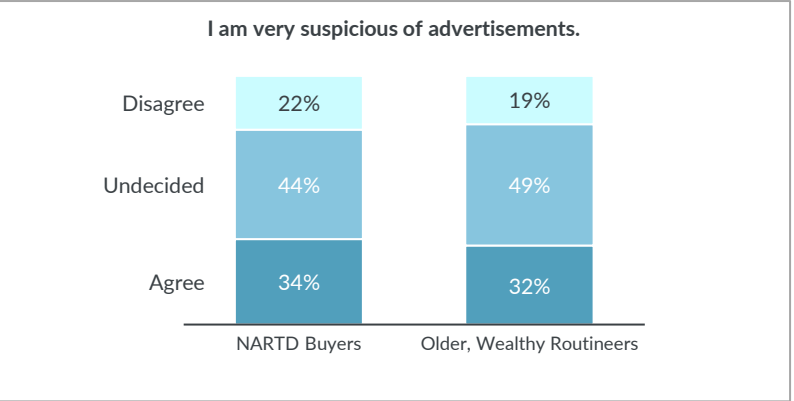
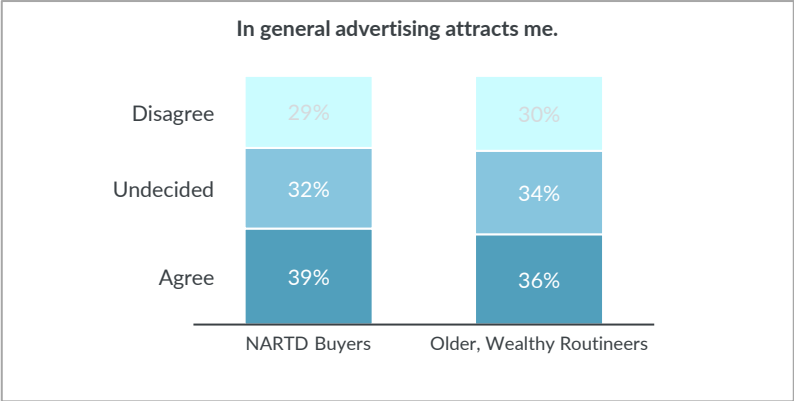
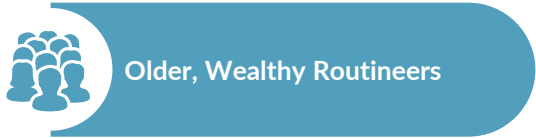


Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



Media behavior & Advertising usage



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



8



Media behavior & Advertising usage

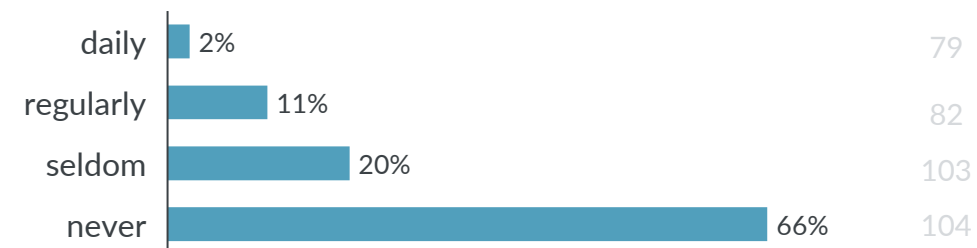


Older, Wealthy Routineers

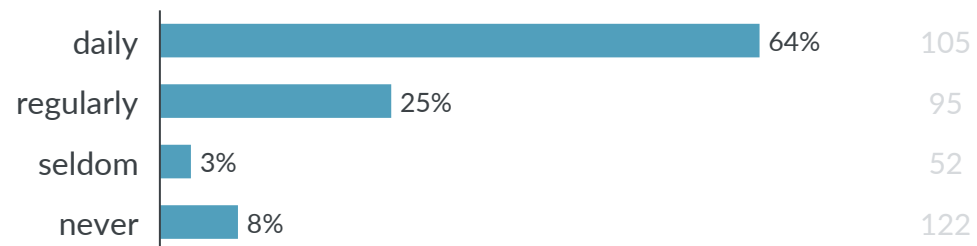
How often are you watching tv



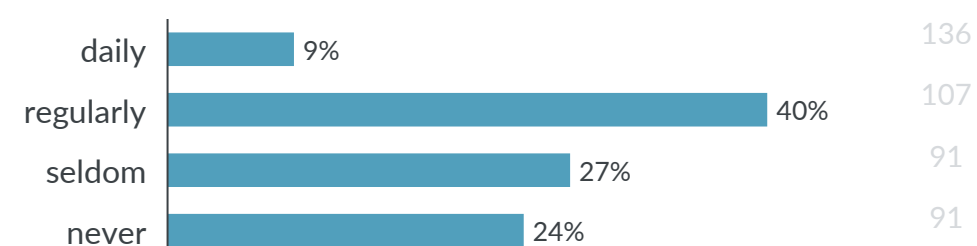
How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

8

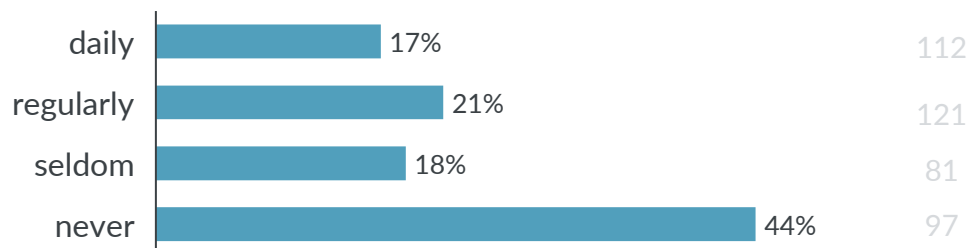


Media behavior & Advertising usage

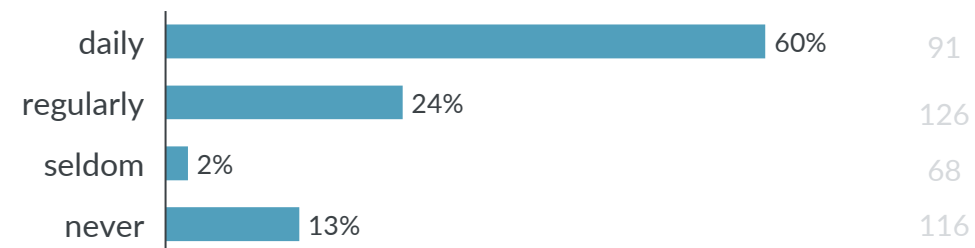


Older, Wealthy Routineers

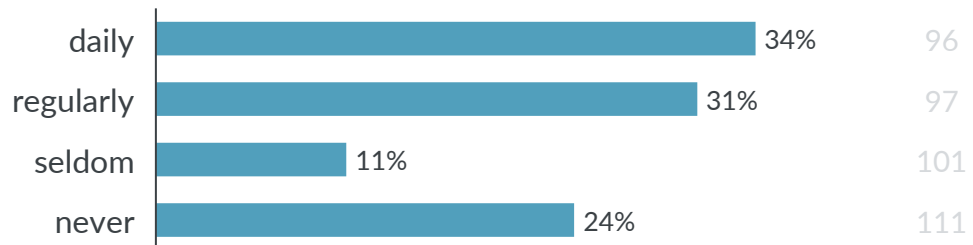
How often are you reading (printed) newspapers



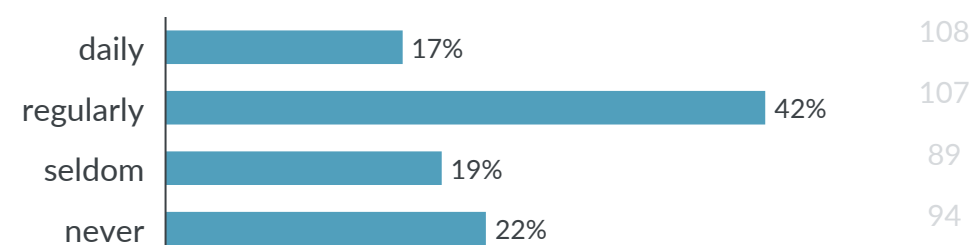
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



8

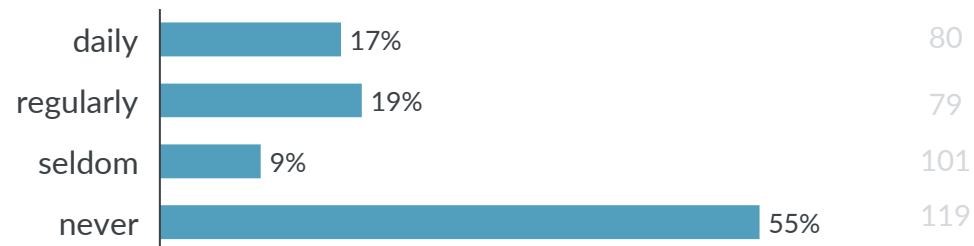


Media behavior & Advertising usage

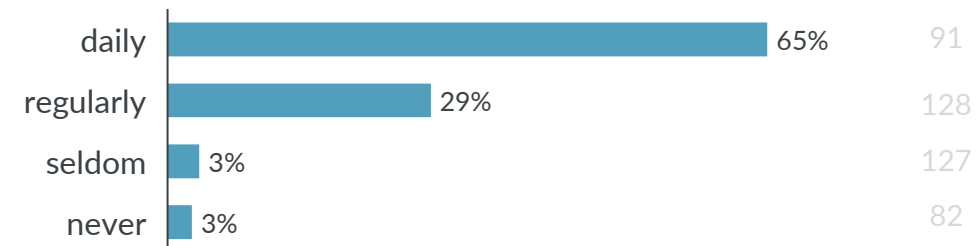


Older, Wealthy Routineers

How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



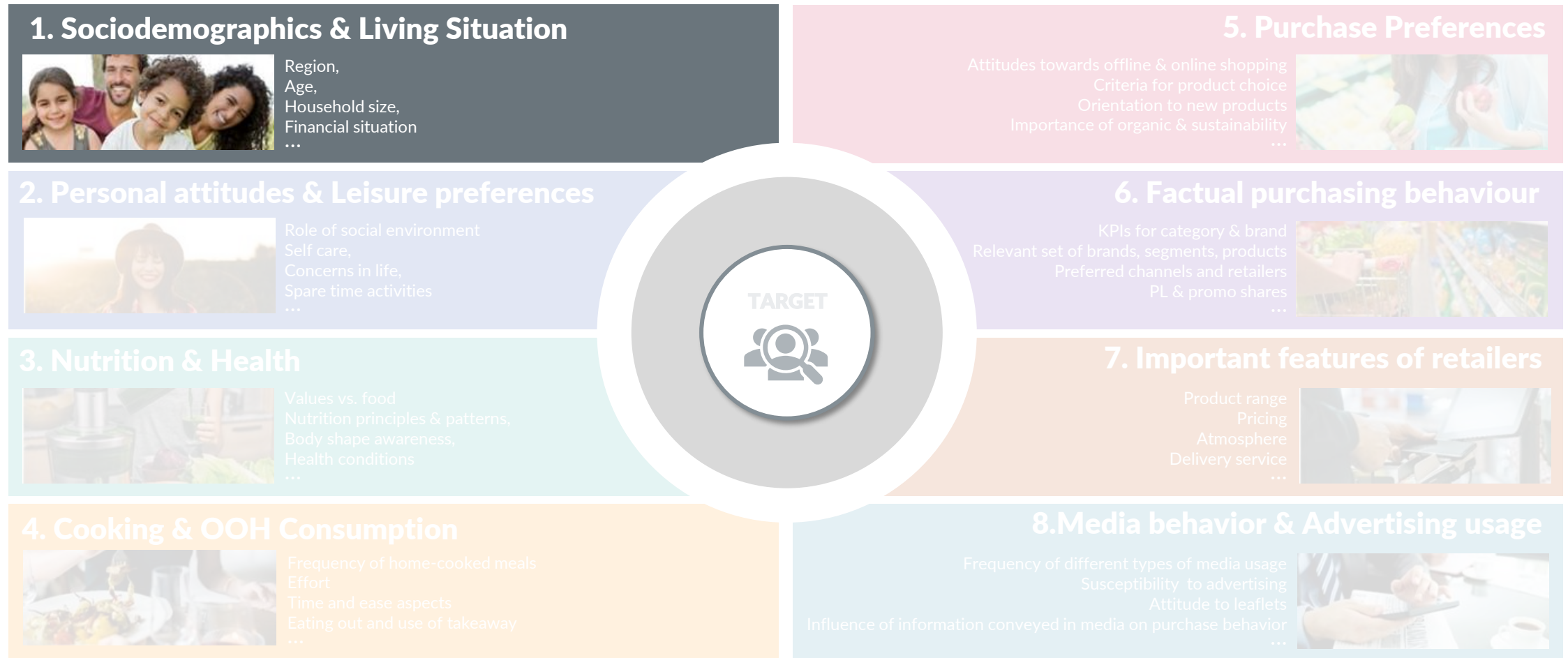
Surfing the internet (otherwise)



03

Brand Stock Up Promo Hunters

Chapter 1: Sociodemographics & Living Situation



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

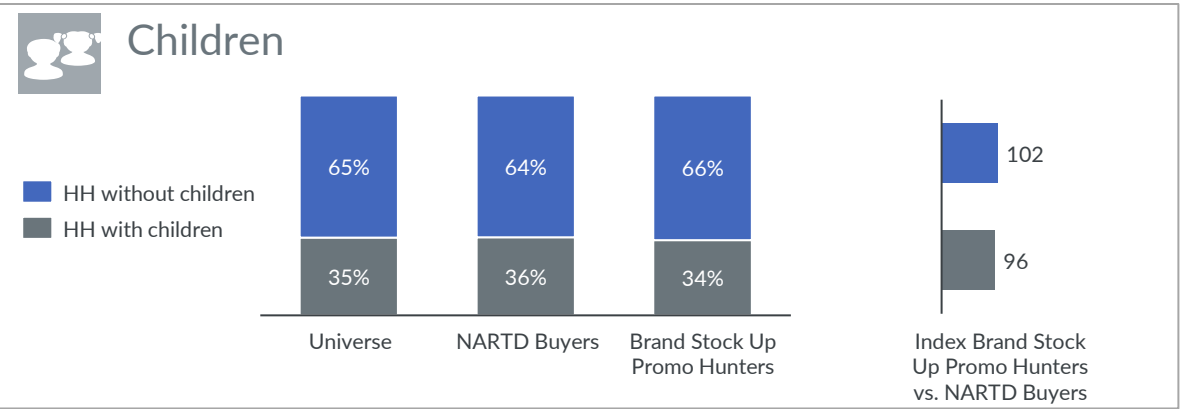
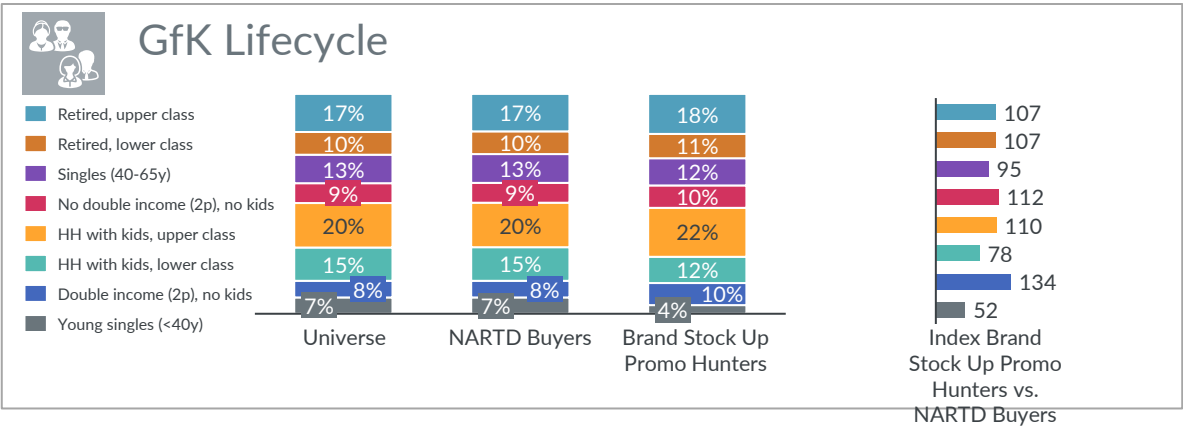
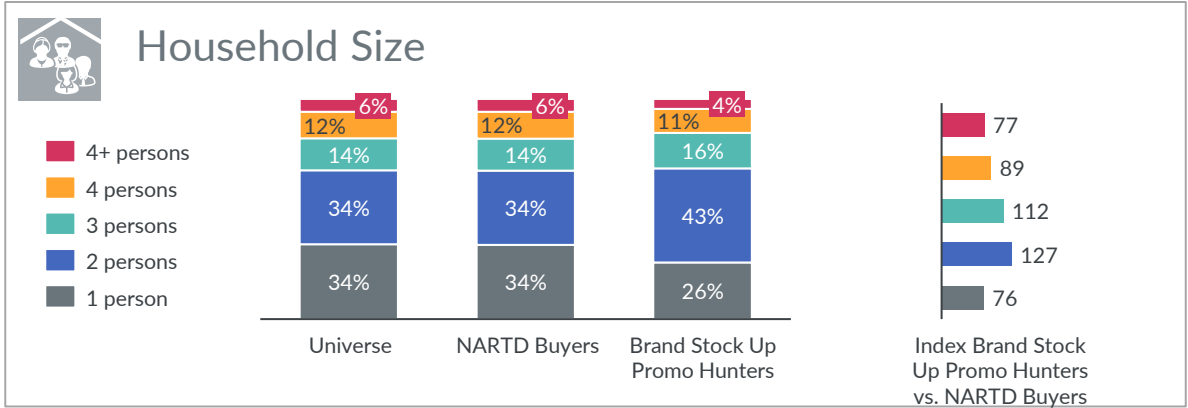
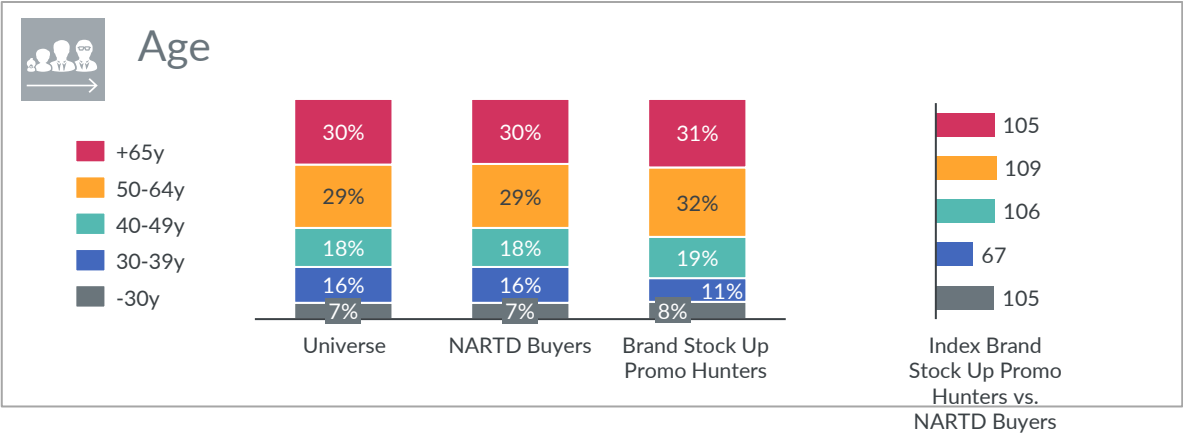


1



Sociodemographics & Living Situation

Brand Stock Up Promo Hunters



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



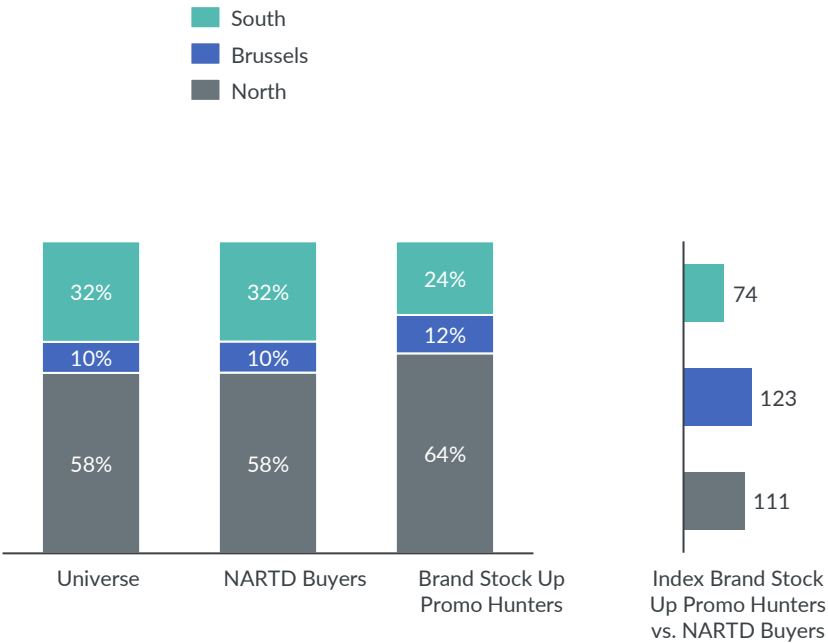
1



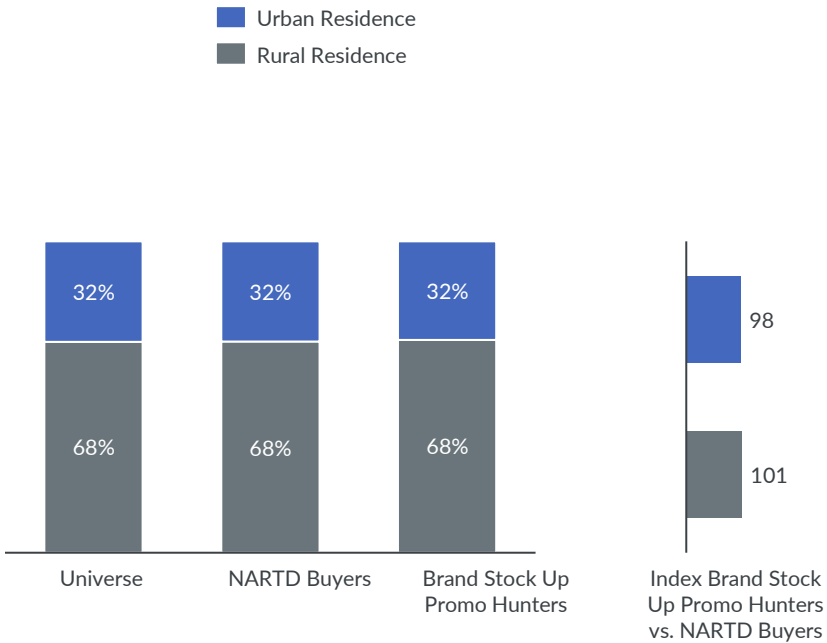
Sociodemographics & Region



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



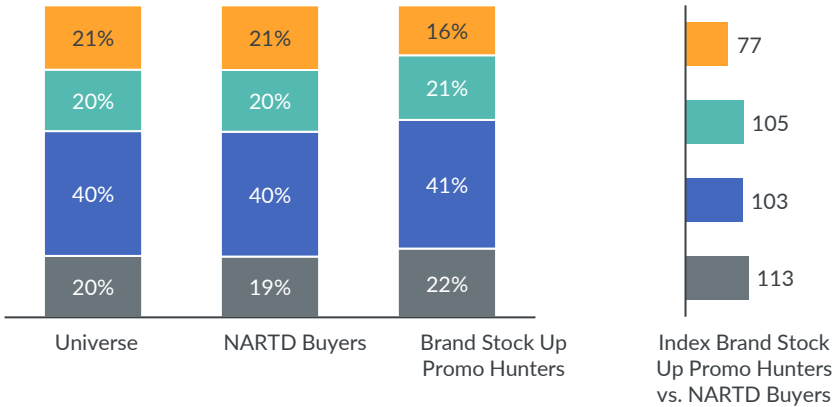
Sociodemographics & Financial Situation

Brand Stock Up Promo Hunters



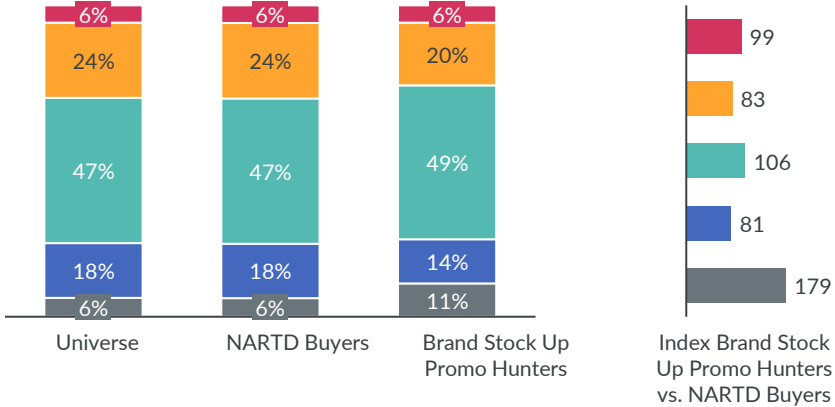
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



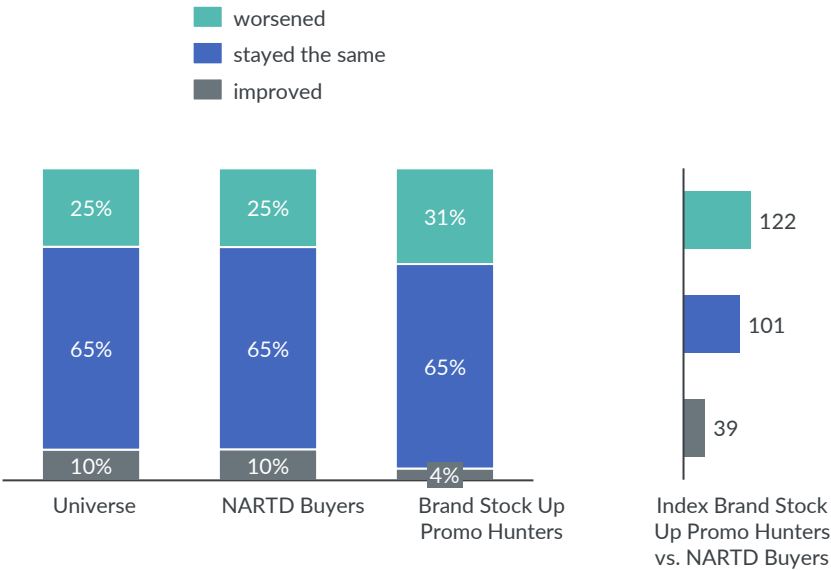
Sociodemographics & Financial Situation

Brand Stock Up Promo Hunters



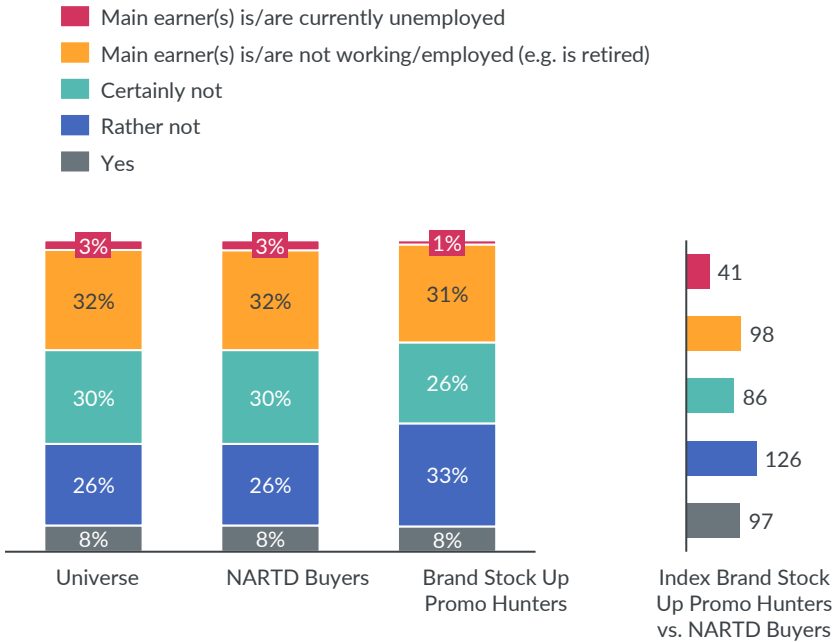
Future Financial Situation

Do you think that in 12 months your financial situation will have



Employment

Could the employment of the main earner(s) in your household be at risk?



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2













Personal attitudes & Leisure preferences

top and flop statements



Brand Stock Up Promo Hunters

Going to clubs/ nightclubs	2%	 126
Going to sport events: games/ competitions	7%	 124
Do it yourself projects/ activities (DIY)	14%	 117
Playing computer games	39%	 114
Doing sports	24%	 112
Going to the cinema	16%	 93
Outdoor activities / spending time in nature	37%	 93
Visiting training / continuing education courses	8%	 91
Going to the theatre	11%	 86
Meditating, praying, going to church	4%	 68

Share of agreement
NARTD Buyers

Index Brand Stock Up Promo
Hunters vs. NARTD Buyers

- Leisure activities of the target group in focus are very active & sport oriented.
- Calm activities at home or out are not favorable

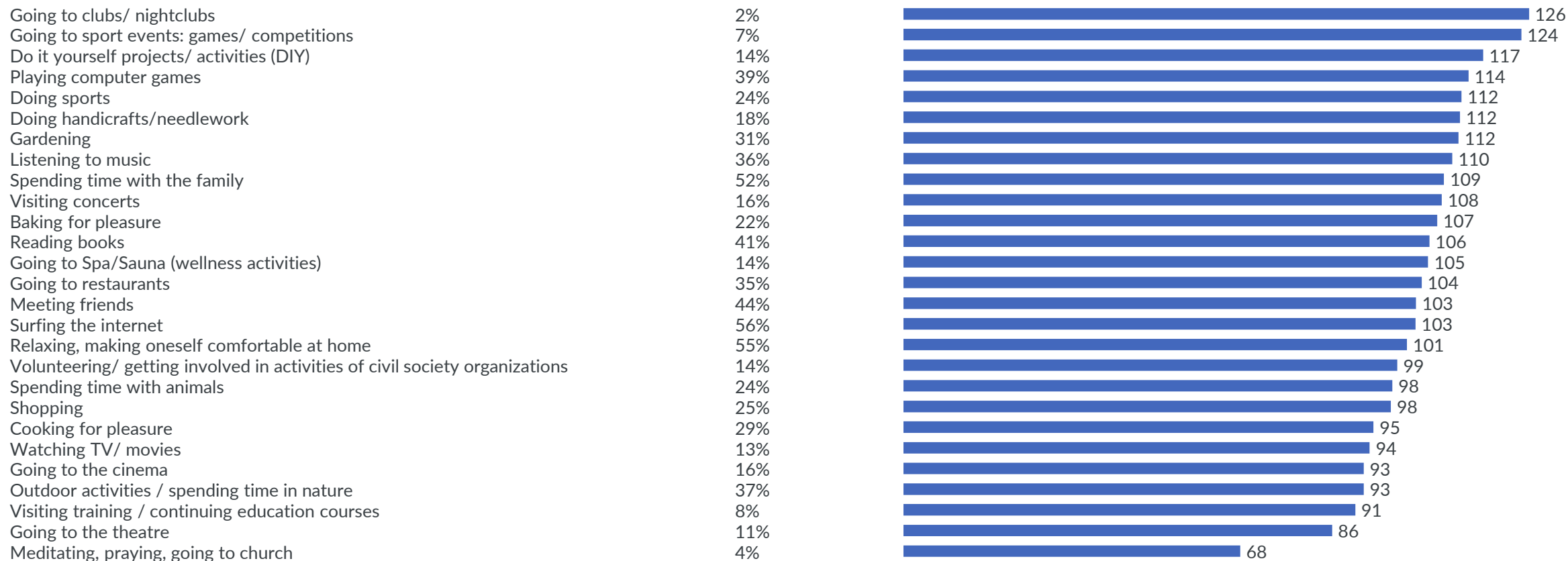
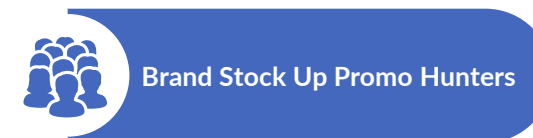
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

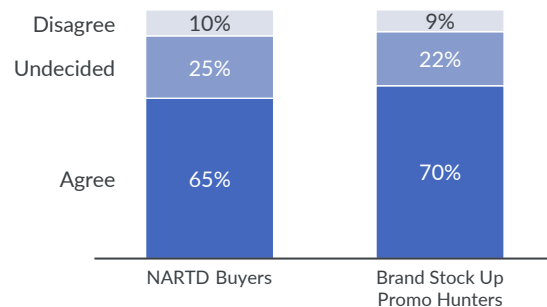


Personal attitudes & Leisure preferences

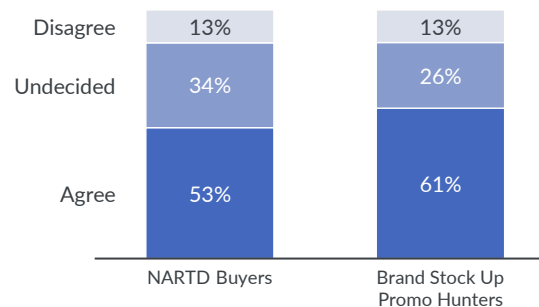


Brand Stock Up Promo Hunters

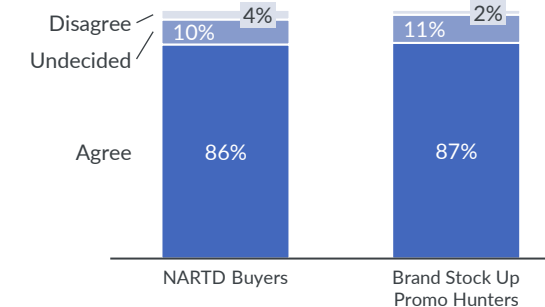
I like to be among people and enjoy socializing.



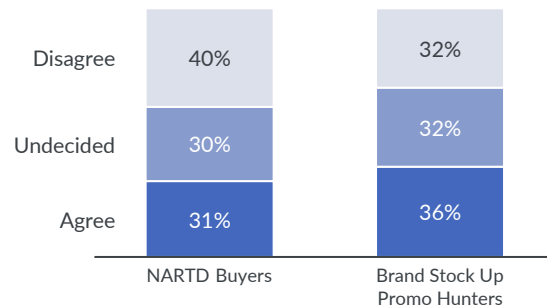
I do not like changes in my lifestyle.



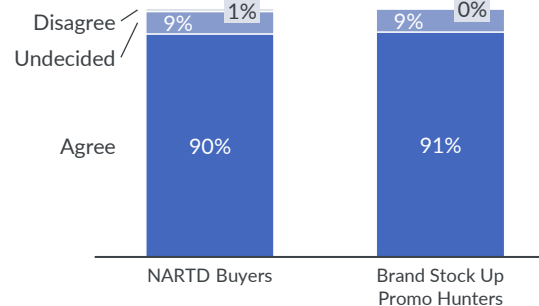
Family means a lot to me.



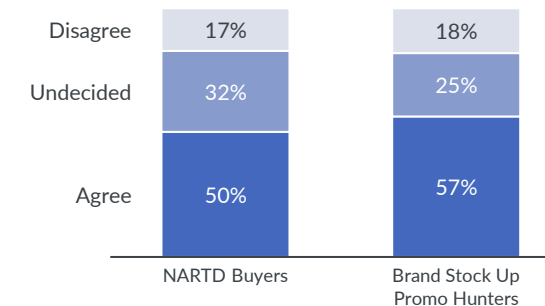
I do not worry about my future financial situation when I retire.



It is important to spoil yourself occasionally.



My appearance/ look is very important to me.

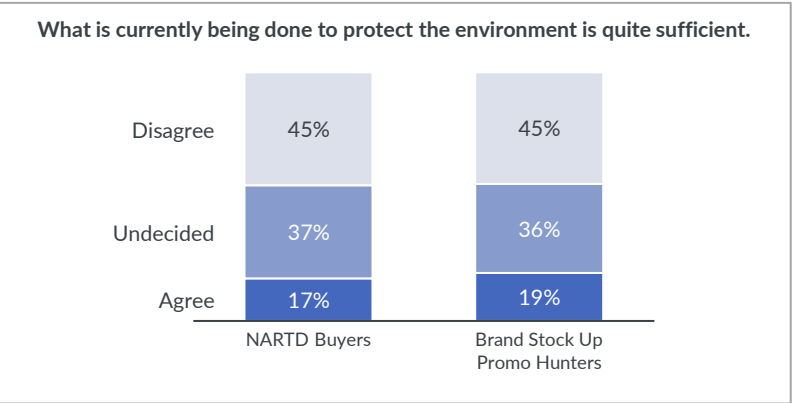
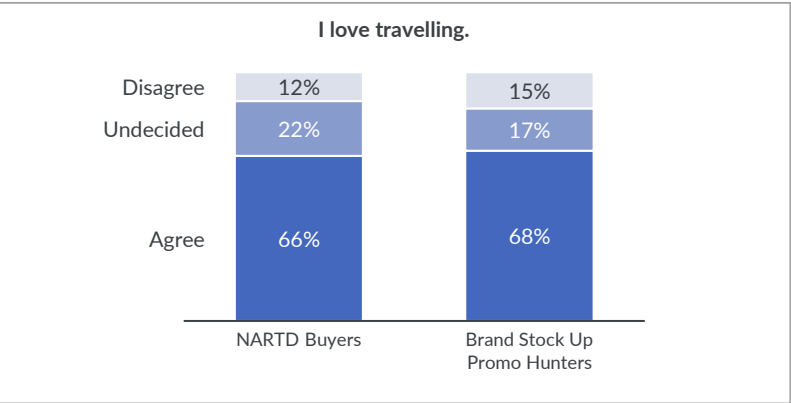
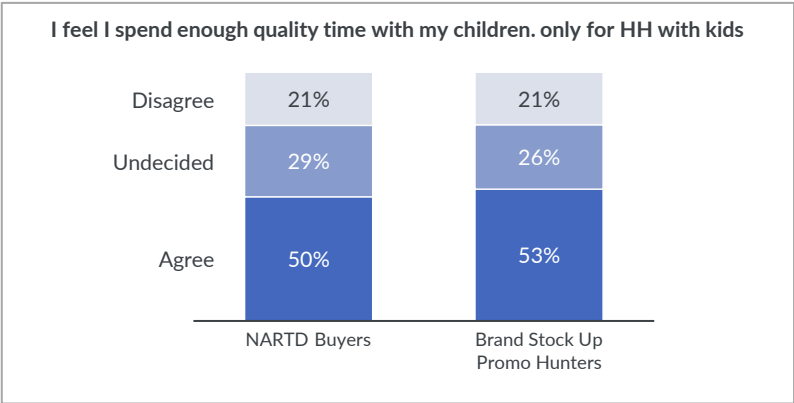
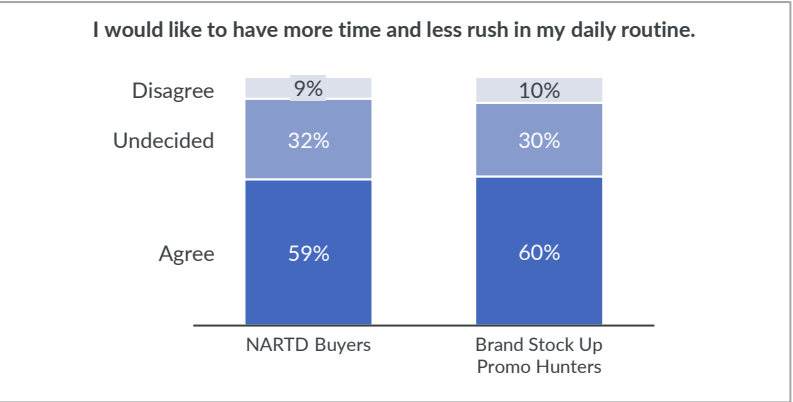
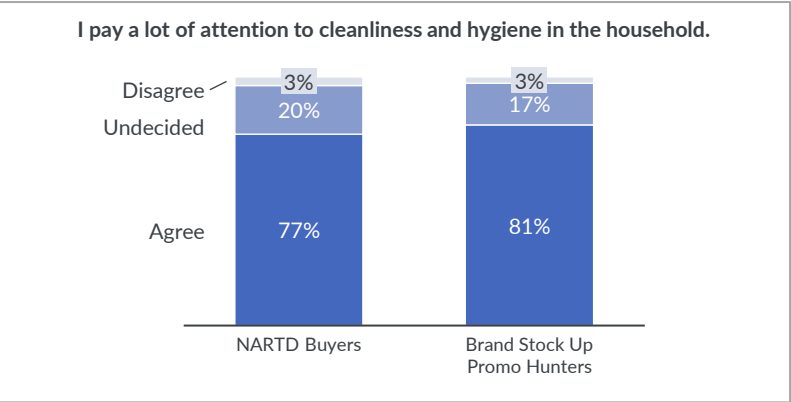
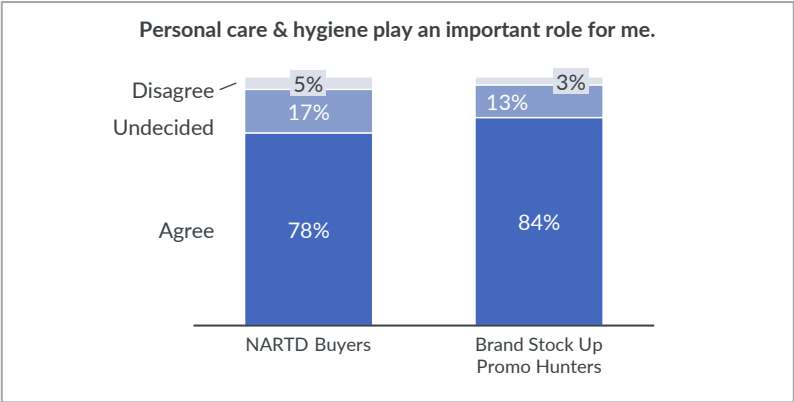
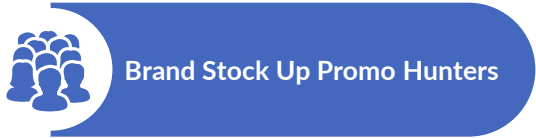


Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

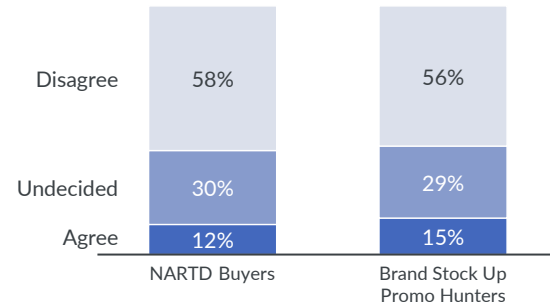


Personal attitudes & Leisure preferences



Brand Stock Up Promo Hunters

I often have newly launched products faster than my friends.



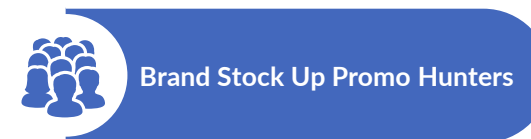
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



● NARTD Buyers

● Brand Stock Up Promo Hunters

Enjoying life in the here and now					Thinking about tomorrow
Buying what you like					Buying what is necessary
Being careful					Daring something/ taking risk
Living an active exciting life					Living a quiet, secluded life
Shopping for groceries is fun					Shopping groceries is annoying
I like to buy things that nobody else has					I don't care if others have the same products
When shopping, I pay particular attention to price					When shopping, I pay particular attention to quality

I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 128
I do a lot for my health.	48%	<div></div> 101
I like to spoil myself with good food.	83%	<div></div> 99
I exercise regularly to stay fit.	50%	<div></div> 98
I consciously pay attention to a healthy diet.	59%	<div></div> 98
I take care of my inner, mental health/balance.	54%	<div></div> 97
When eating and drinking I watch my figure.	46%	<div></div> 87
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 75

Share of agreement
NARTD Buyers

Index Brand Stock Up Promo
Hunters vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



Brand Stock Up Promo Hunters

- The focus target group does not pay attention to a healthy diet.
- They prefer to give their children what they want for their meals.

Nutrition & Health

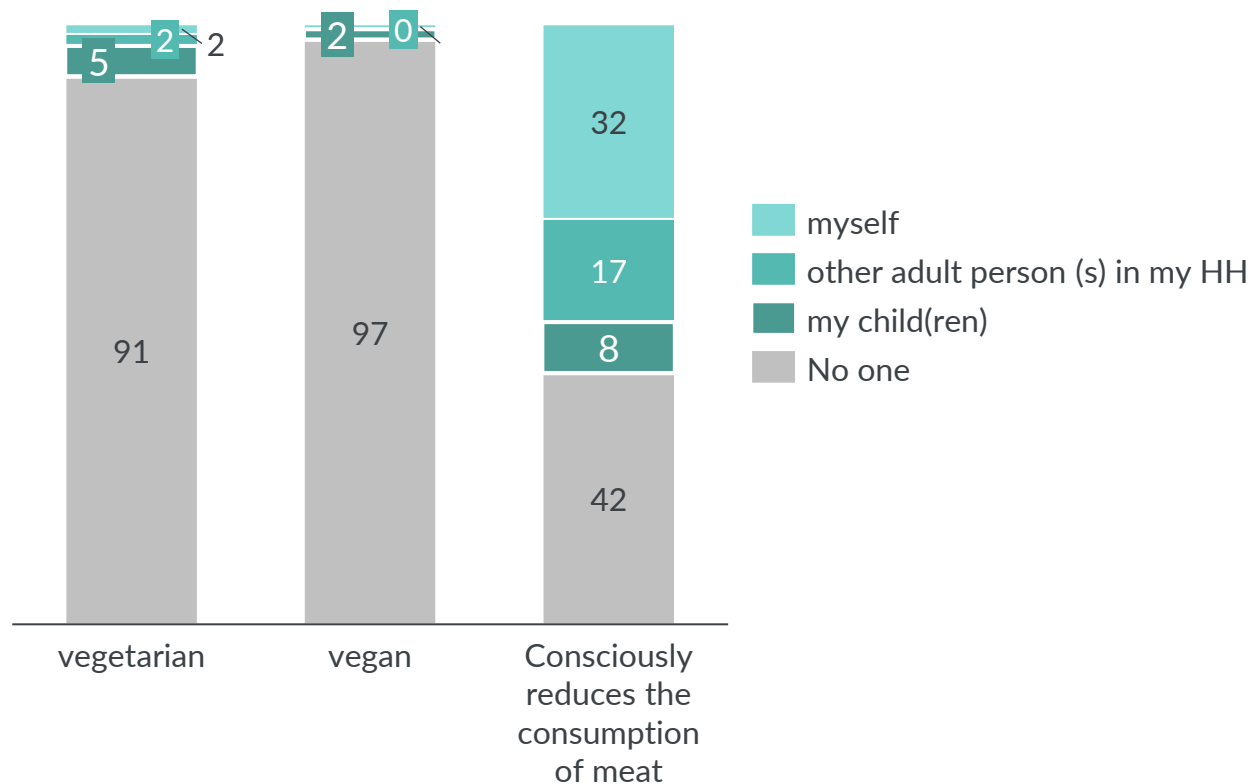
Special Nutrition patterns

3



Nutrition & Health

Share of different nutrition styles in the households



Brand Stock Up Promo Hunters

- The focus target group pays attention to their meat consumption, but abstains from a purely plant-based diet.

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

Coeliac disease (gluten intolerance)	2%	157
High blood pressure	10%	135
No, relevant health conditions with impact on shopping behavior	60%	107
Other allergies or intolerances	9%	106
Lactose intolerance	7%	99
High cholesterol level	13%	85
I prefer not to answer	3%	80
Diabetes	10%	74
Others, not mentioned here	4%	44
Skin problems	6%	41

Share of agreement
NARTD Buyers

Index Brand Stock Up Promo
Hunters vs. NARTD Buyers



Brand Stock Up Promo Hunters

- The focus target group has comparatively more allergies or intolerances.
- Gluten intolerance & high blood pressure is more common than average in the target group.

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption

4



Cooking & OOH Consumption



Brand Stock Up Promo Hunters

I love to cook fancy/exceptional dishes and meals.	19%	110
I like to cook.	60%	106
I prefer to cook meals that do not take a lot of time to prepare.	46%	101
At home we cook hot meals every day/very often.	82%	100
I often eat out (canteen, cafe, restaurant, etc.).	13%	99
The easier the cooking, the more I like it.	45%	95
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	91
I often eat quickly and 'on the go'.	10%	64
I often order takeaway food, delivered at home or for pick up).	7%	60

Share of agreement
NARTD Buyers

Index Brand Stock Up Promo
Hunters vs. NARTD Buyers

- the target group likes to cook (fancy meals) at home and does so regularly.
- The use of takeaway food and eating 'on the go' play a subordinate role

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

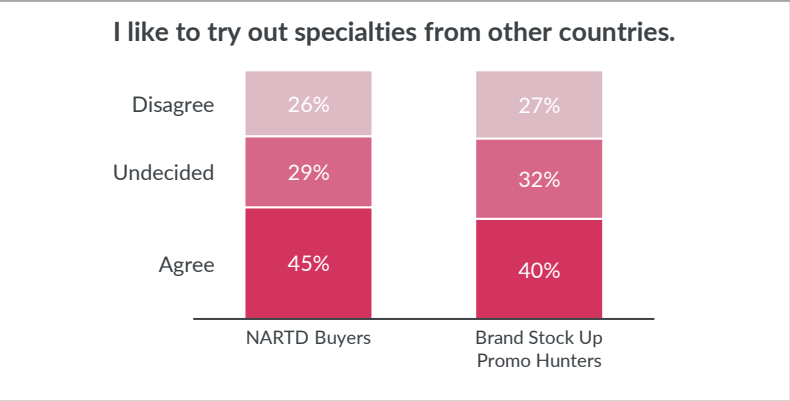
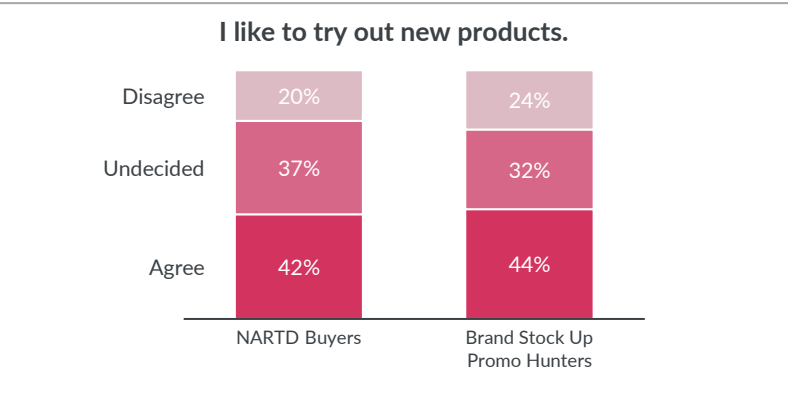
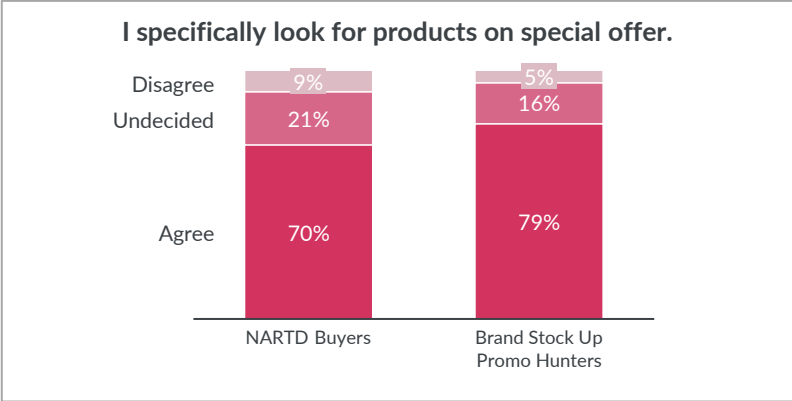
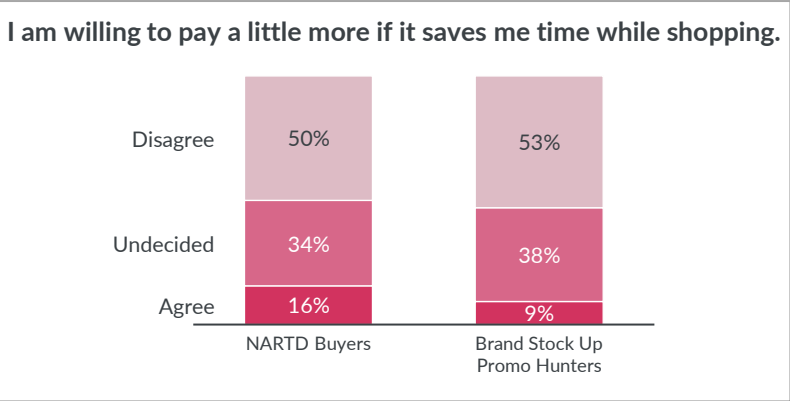
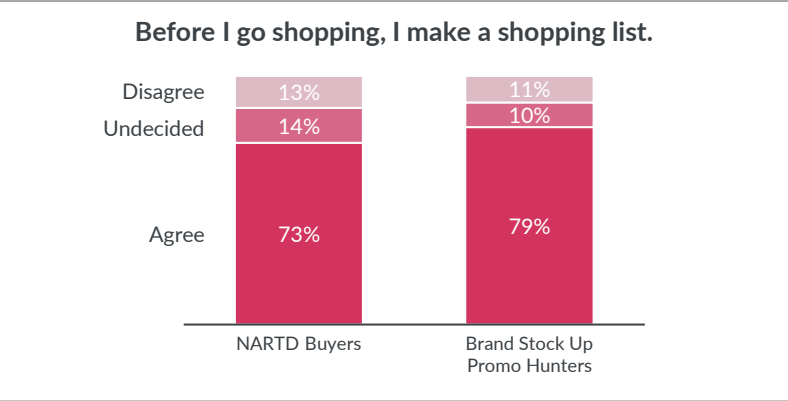
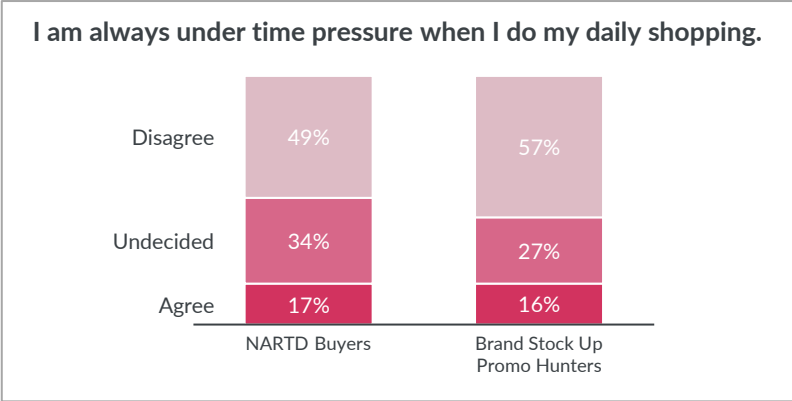
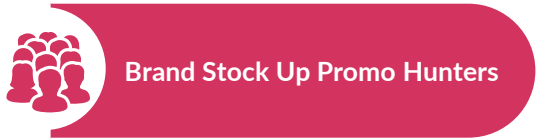


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

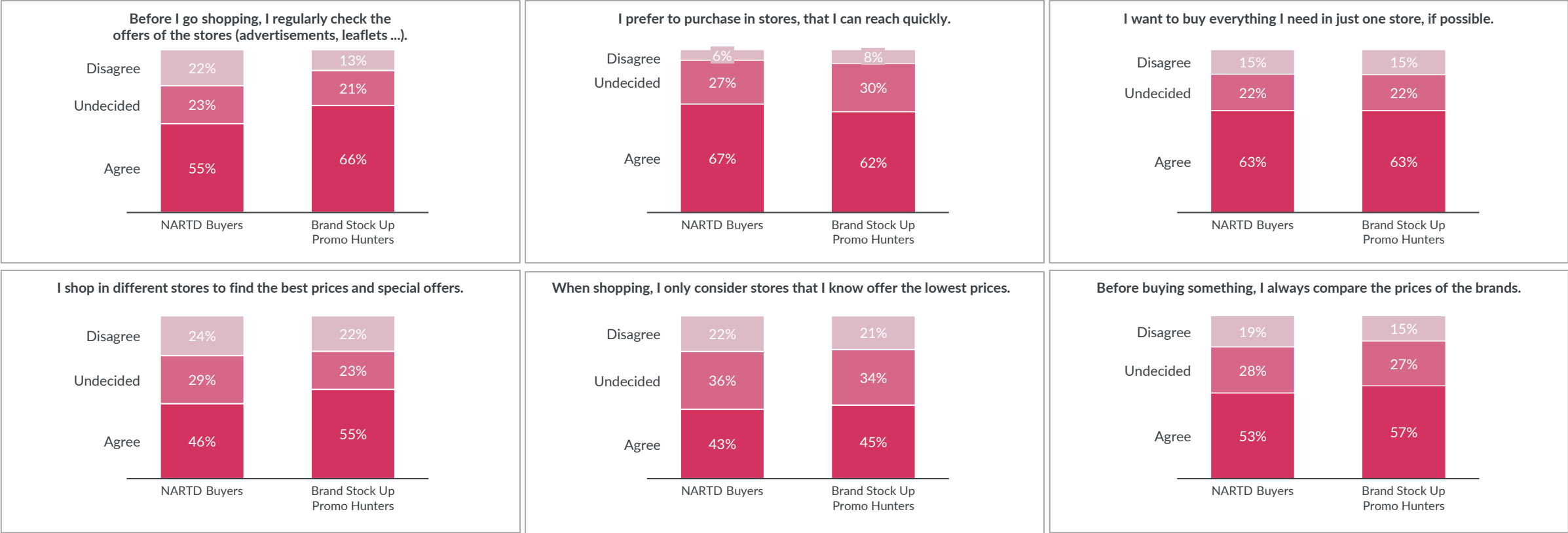
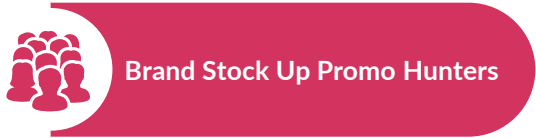


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

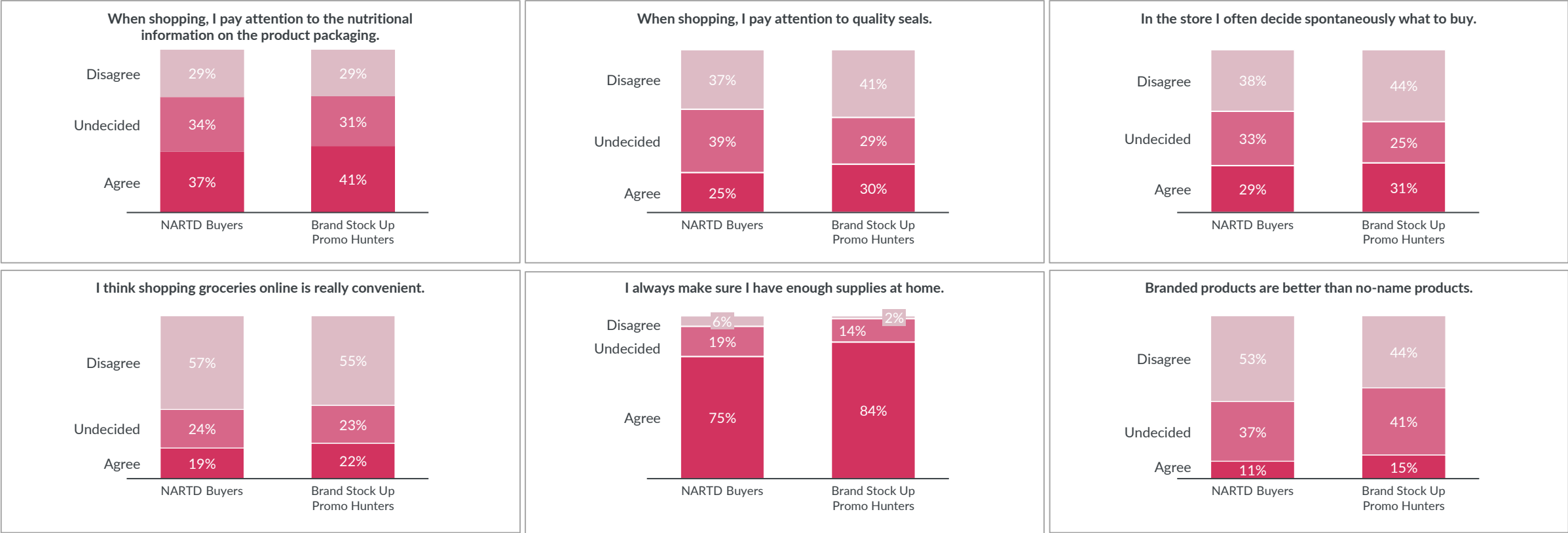


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

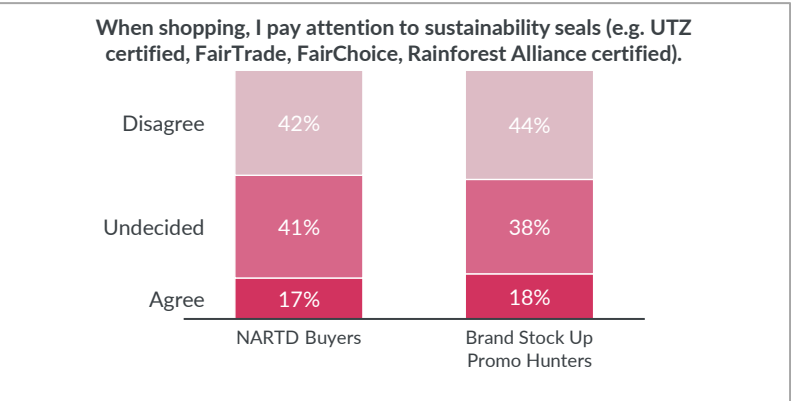
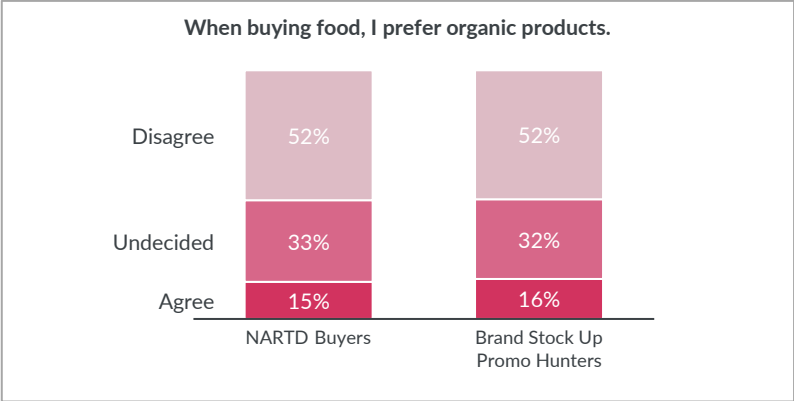
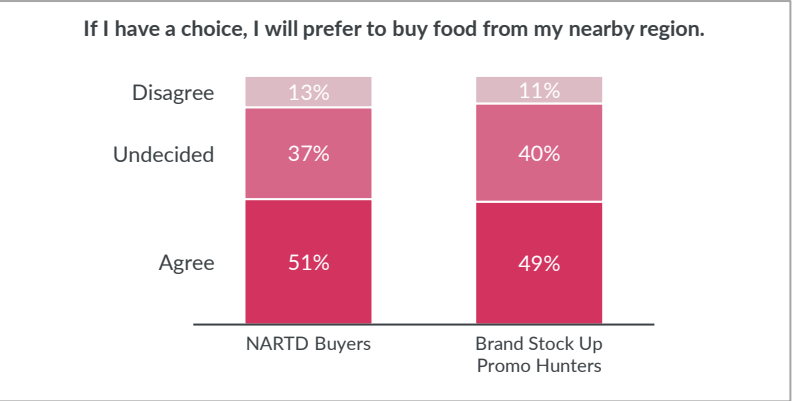
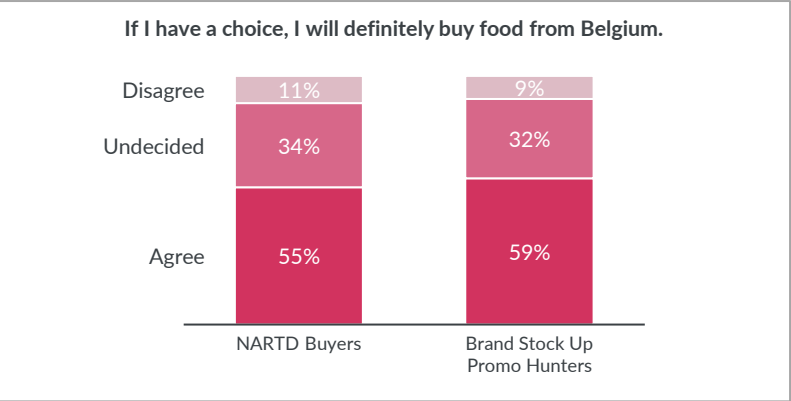
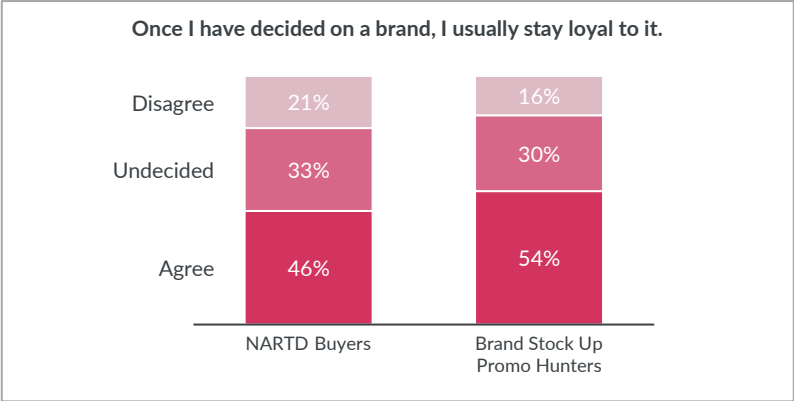
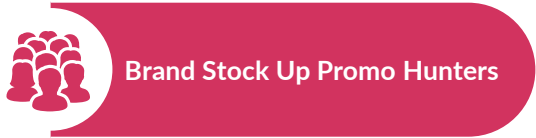


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



Purchase preferences

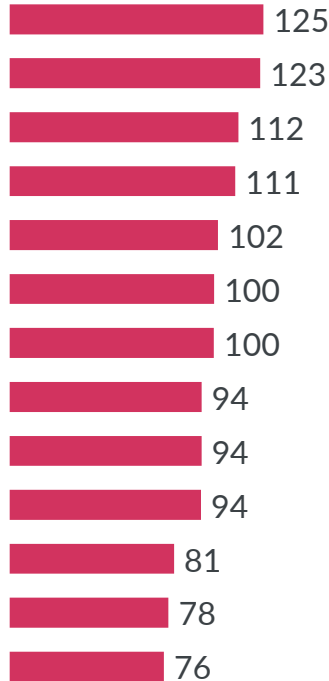
What do shoppers consider when they purchase?



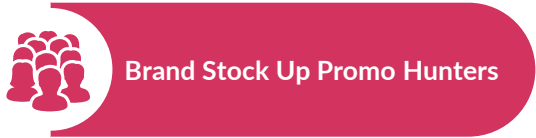
Purchase Preferences

Products low in salt	13%
Gluten free products	3%
Origin of ingredients is clear	29%
Products less harmful to the environment	24%
Products high in fiber	26%
Products low in calories	30%
Lactose free products	9%
No artificial additives/ preservatives	27%
Products with no/low fat	29%
Products with no/low sugar	40%
No genetically modified organisms (GMOs)	20%
High protein products	14%
Products free from artificial sweeteners	22%

Share of agreement
NARTD Buyers



Index Brand Stock Up Promo
Hunters vs. NARTD Buyers



- the target group likes low salt, gluten free products.
- They are not fond of light/zero or low fat products.
- These buyers don't really care about GMOs or artificial added ingredients.

Purchase preferences



What do shoppers consider when they purchase?

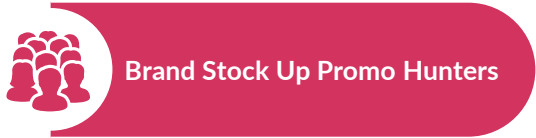


Purchase Preferences

Products free from palm oil	22%	<div></div> 127
Fairly produced and traded products	24%	<div></div> 119
Products made from natural ingredients	37%	<div></div> 119
Products which are produced in an environmentally friendly manner	24%	<div></div> 100
Products contributing to animal welfare	25%	<div></div> 98
Environmentally friendly packaging	37%	<div></div> 97
Organic / bio products	9%	<div></div> 94
Products without long transport	21%	<div></div> 92
Climate-neutral / carbon-neutral products	8%	<div></div> 68

Share of agreement
NARTD Buyers

Index Brand Stock Up Promo
Hunters vs. NARTD Buyers



- The target group cares about more about fair trade than about climate friendly products.

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7



Important Features of Retailers

top and flop statements

Wide range of well-known brands	46%	<div></div> 130
Loyalty card / loyalty program	64%	<div></div> 115
Attractive organic assortment	22%	<div></div> 110
Attractive promotions	86%	<div></div> 109
Quick service / short waiting time at the checkout	70%	<div></div> 108
Availability of local/regional products	42%	<div></div> 96
Nice, pleasant atmosphere	62%	<div></div> 96
Close to home/ workplace	73%	<div></div> 94
Offer of ready-to-go / ready-to-eat products and meals	17%	<div></div> 82
Offers a delivery service	12%	<div></div> 65

Share of agreement
NARTD Buyers

Index Brand Stock Up Promo
Hunters vs. NARTD Buyers



Brand Stock Up Promo Hunters

- The target group prefers a branded assortment, loyalty program & attractive promotions.
- They are looking for a delivery service or a ready-to-eat assortment

Important Features of Retailers

Criteria for choosing a retailer

7

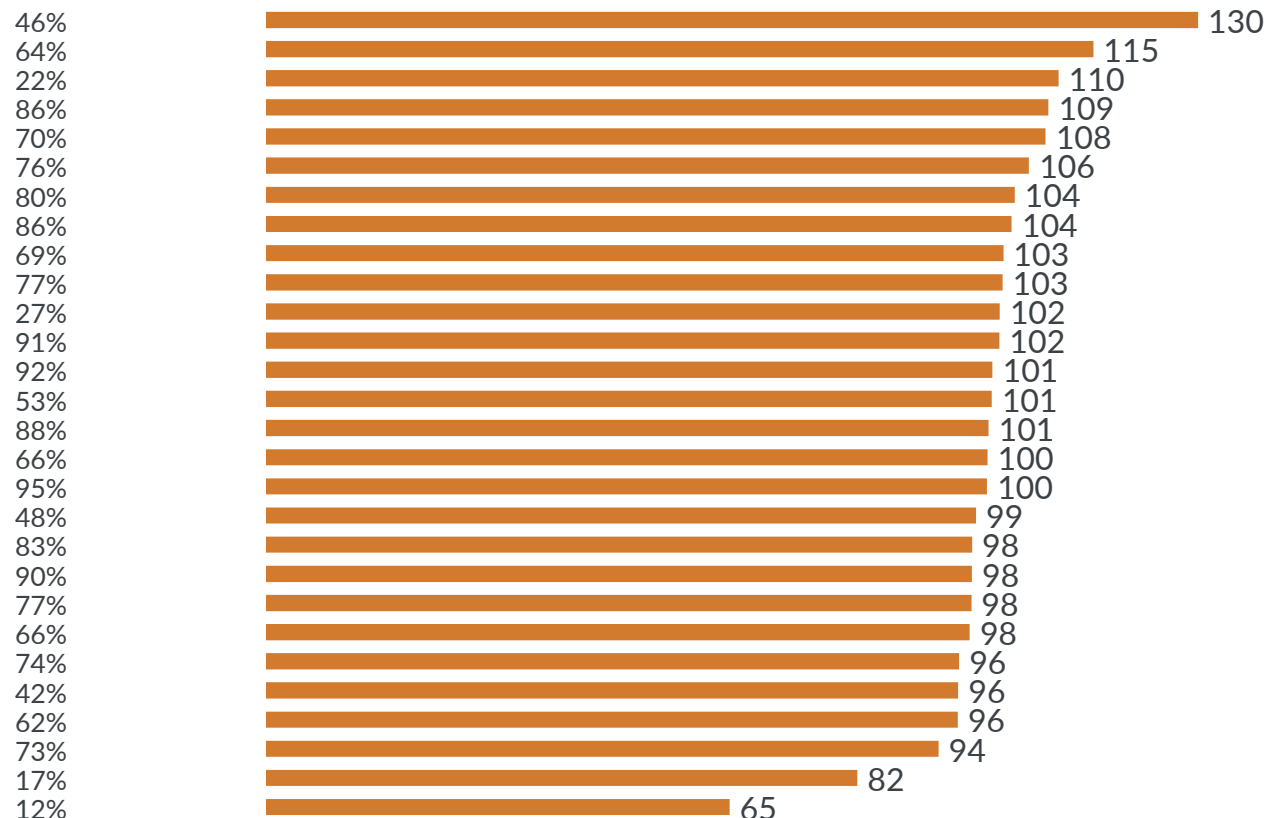


Important Features of Retailers



Brand Stock Up Promo Hunters

Wide range of well-known brands	46%
Loyalty card / loyalty program	64%
Attractive organic assortment	22%
Attractive promotions	86%
Quick service / short waiting time at the checkout	70%
High quality of products	76%
Easy to reach by car, availability of parking lot	80%
Broad assortment, wide range of products	86%
Retailer tries to reduce food waste	69%
Attractive private labels	77%
Possibility for self-scanning / self-checkout	27%
Constant availability of products, no out of stocks	91%
Good fresh department	92%
Social & environmental responsibility	53%
Friendly, well-trained staff	88%
Retailer contributes to plastic reduction/ avoidance	66%
Overall fair prices	95%
Retailer helps me to make healthy choices	48%
Easy to find products on shelves	83%
Clean and tidy store	90%
Convenient opening hours	77%
Large variety in pack sizes to meet my needs	66%
Clear store layout / easy navigation	74%
Availability of local/regional products	42%
Nice, pleasant atmosphere	62%
Close to home/ workplace	73%
Offer of ready-to-go / ready-to-eat products and meals	17%
Offers a delivery service	12%



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

8

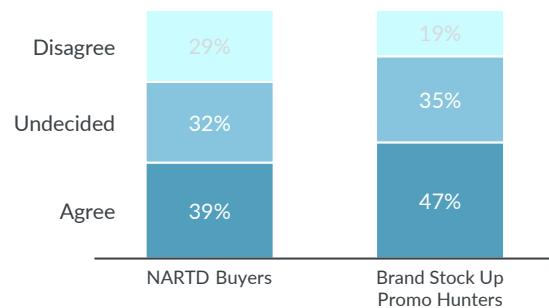


Media behavior & Advertising usage

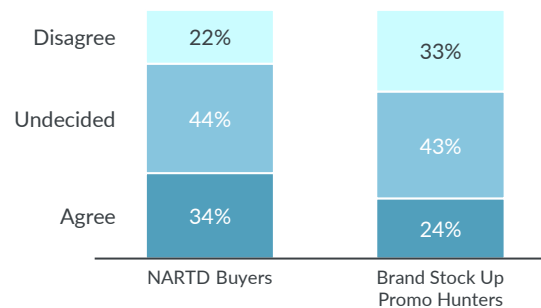


Brand Stock Up Promo Hunters

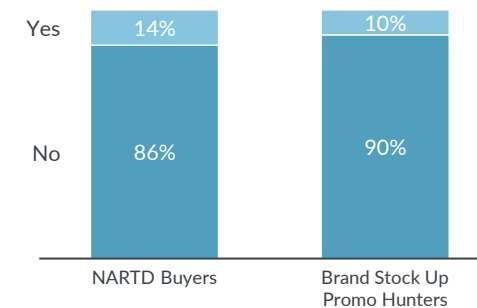
In general advertising attracts me.



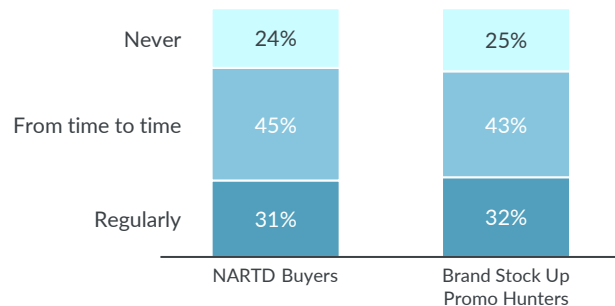
I am very suspicious of advertisements.



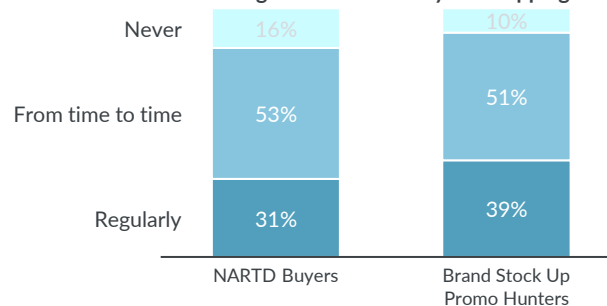
Do you have a sticker on your mailbox indicating you do not wish to receive advertising materials and leaflets?



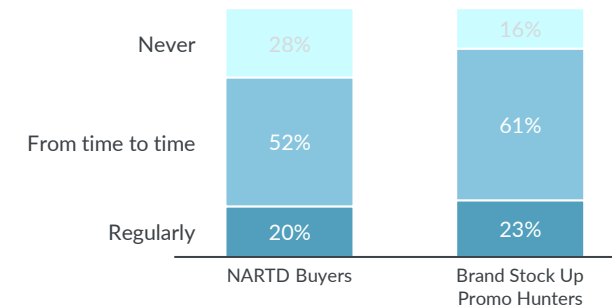
How often do you read free weekly newspapers with advertisement?



How often do you use information from advertising mail/ leaflets for your shopping?



How often do you use information from online (advertising) leaflets?

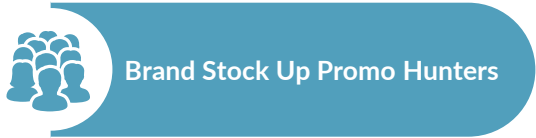


Media behavior & Advertising usage

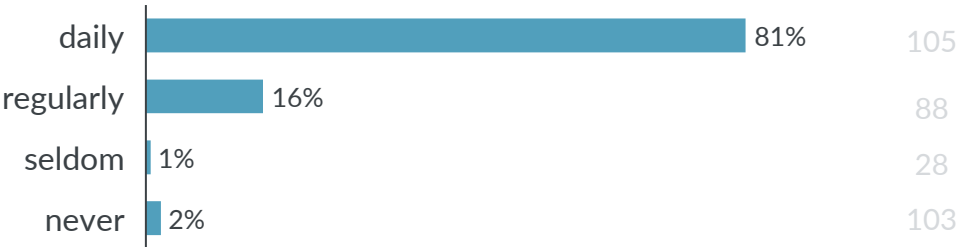
Attitudes and receptivity to media and advertising



Media behavior & Advertising usage



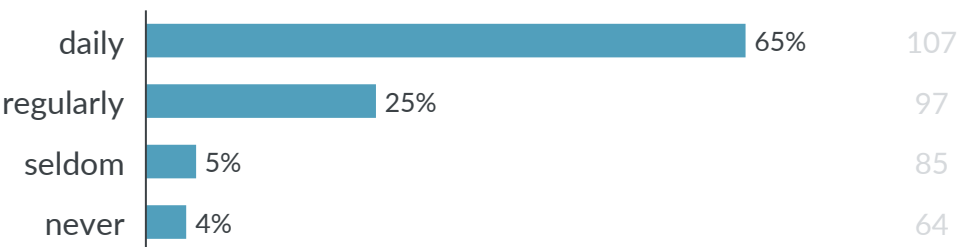
How often are you watching tv



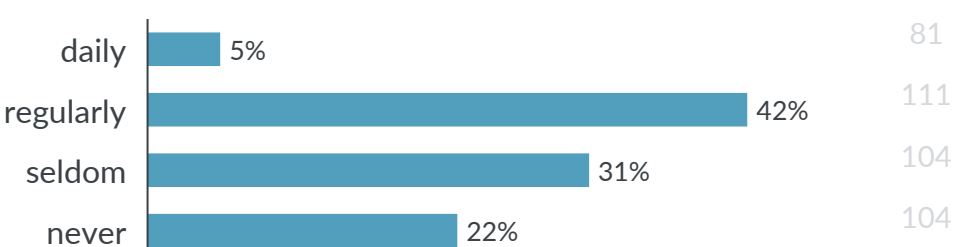
How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

8

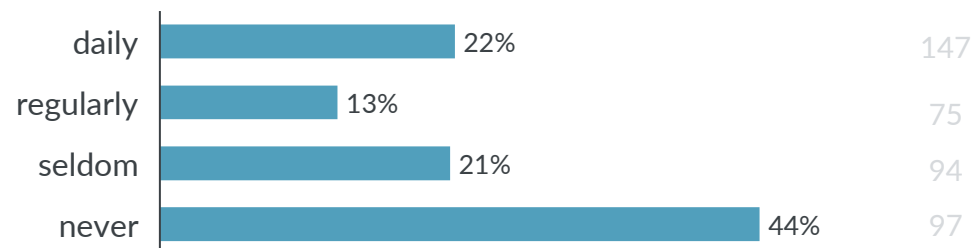


Media behavior & Advertising usage

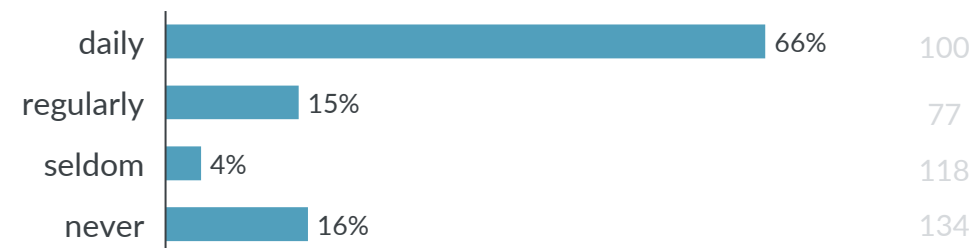


Brand Stock Up Promo Hunters

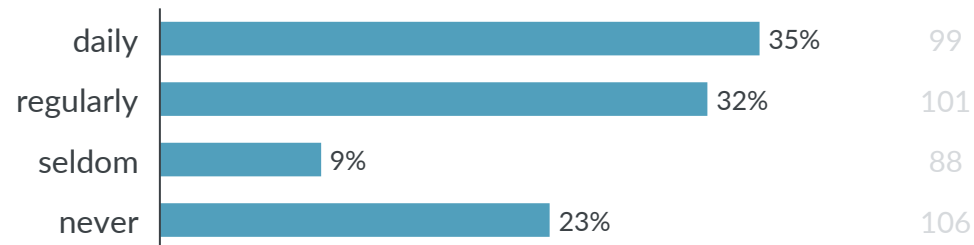
How often are you reading (printed) newspapers



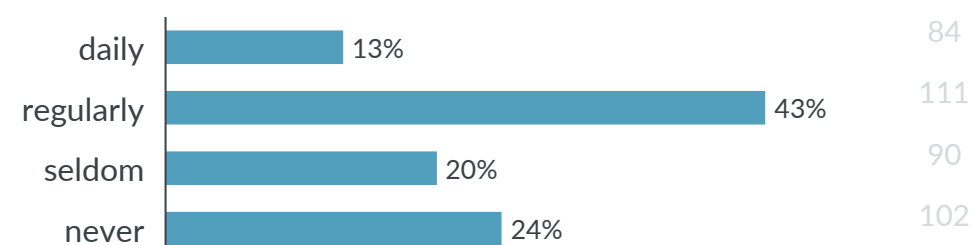
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



8

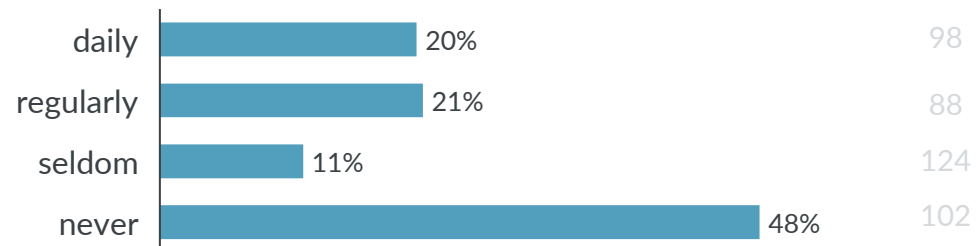


Media behavior & Advertising usage

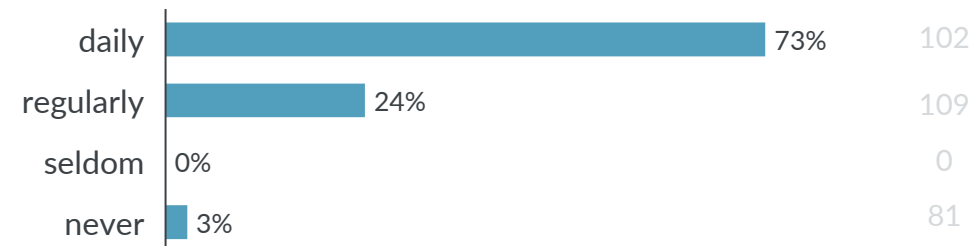


Brand Stock Up Promo Hunters

How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



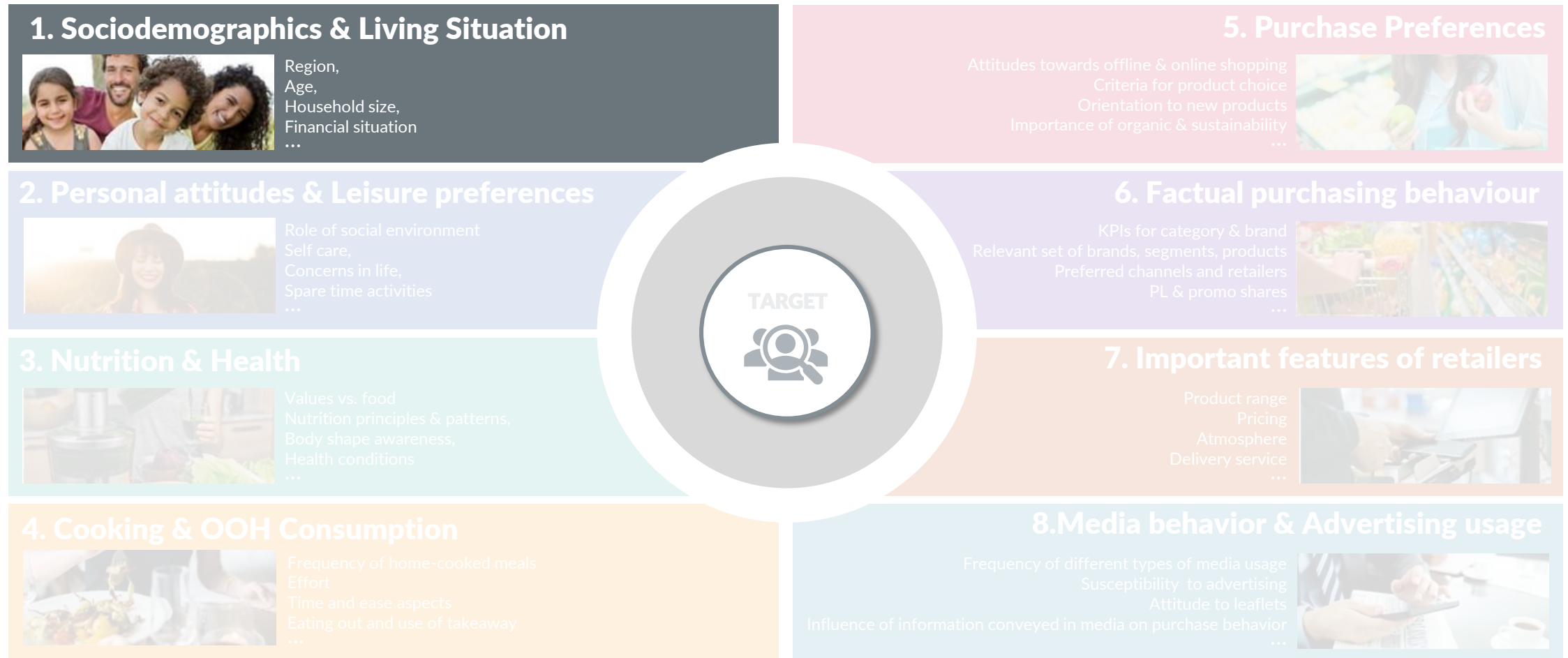
Surfing the internet (otherwise)



04

Spontaneous, SSD Single Servers

Chapter 1: Sociodemographics & Living Situation



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

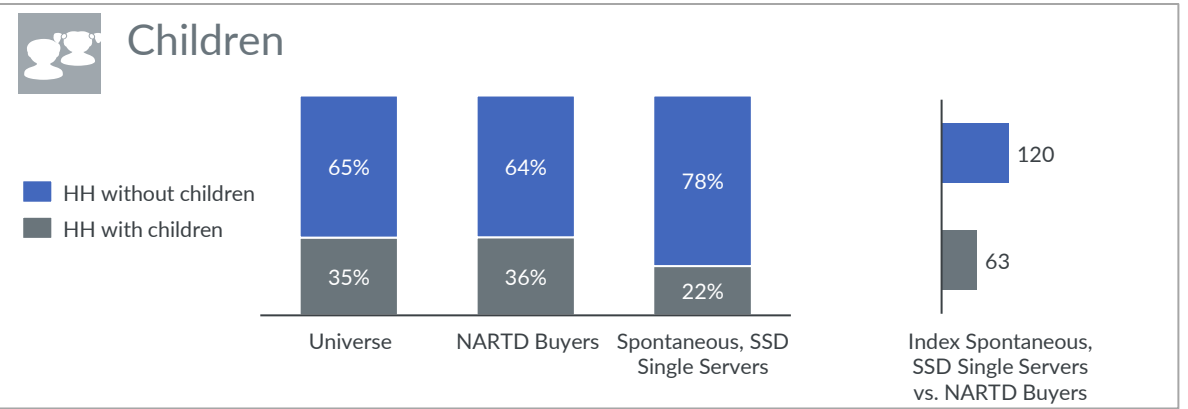
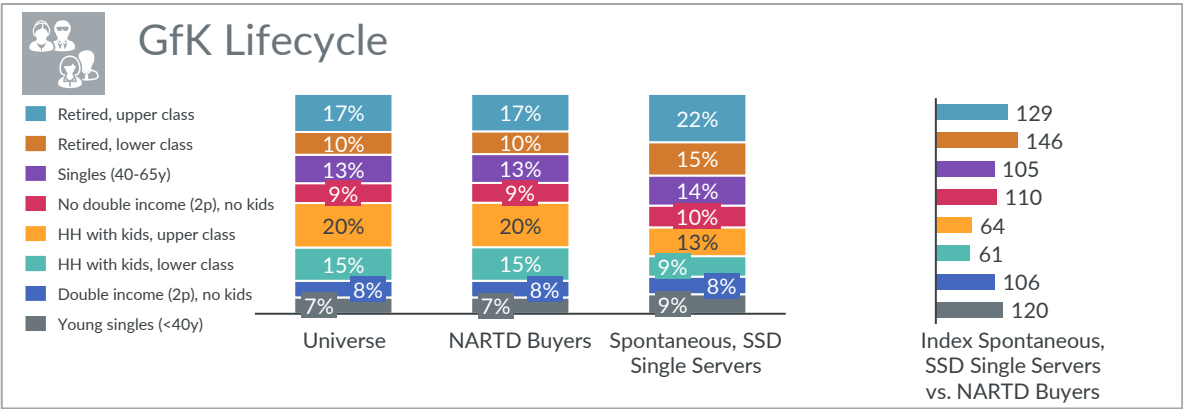
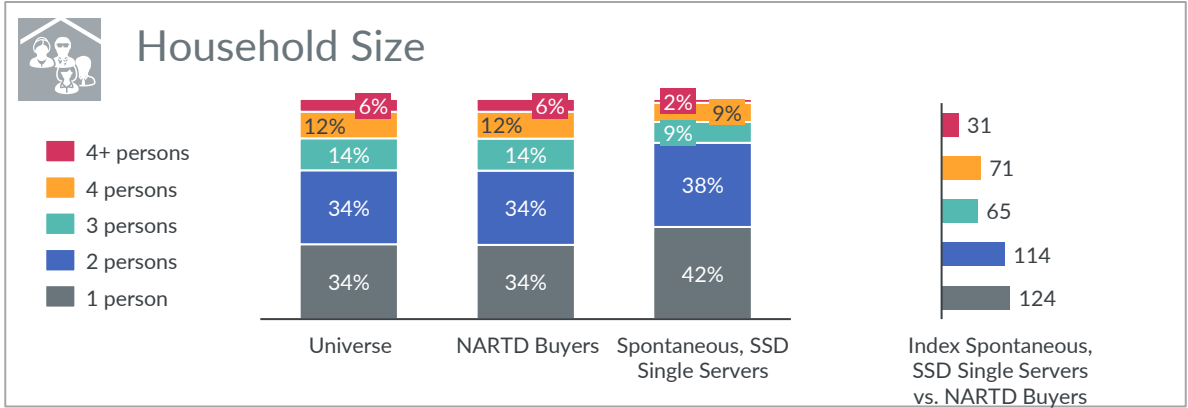
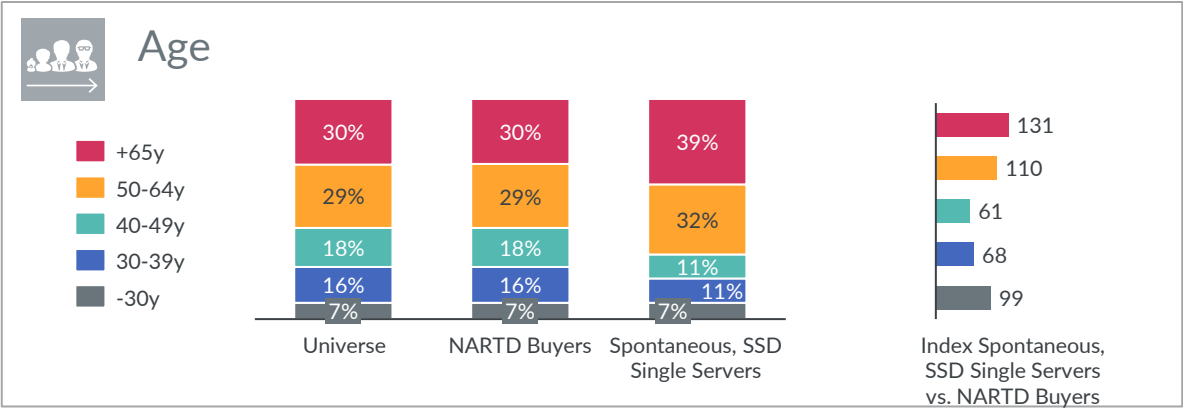


1



Sociodemographics & Living Situation

Spontaneous, SSD Single Servers



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1

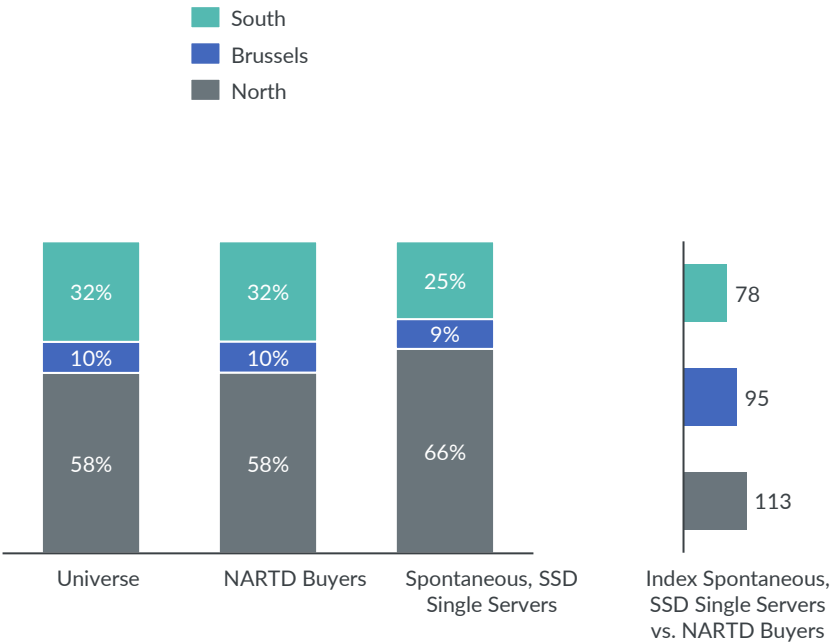


Sociodemographics & Region

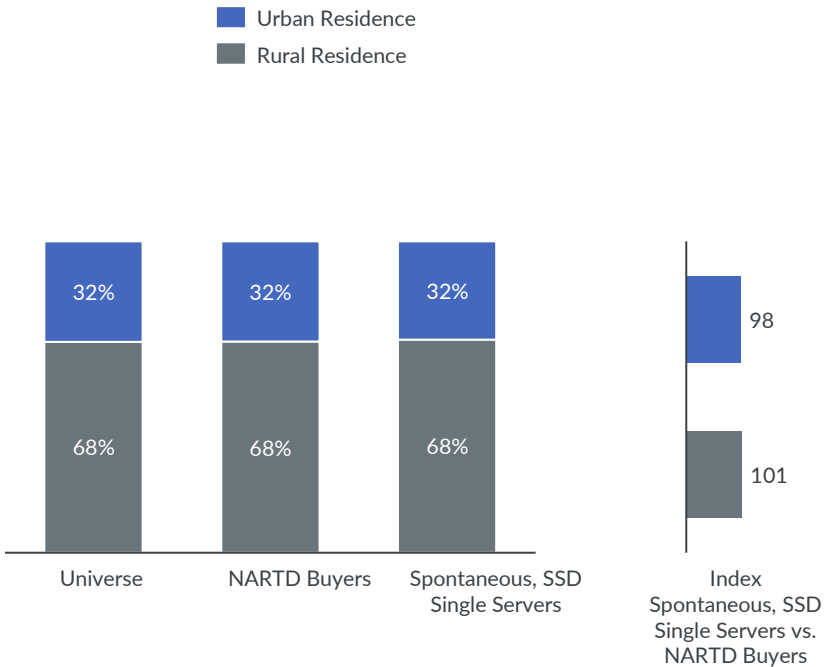
Spontaneous, SSD Single Servers



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



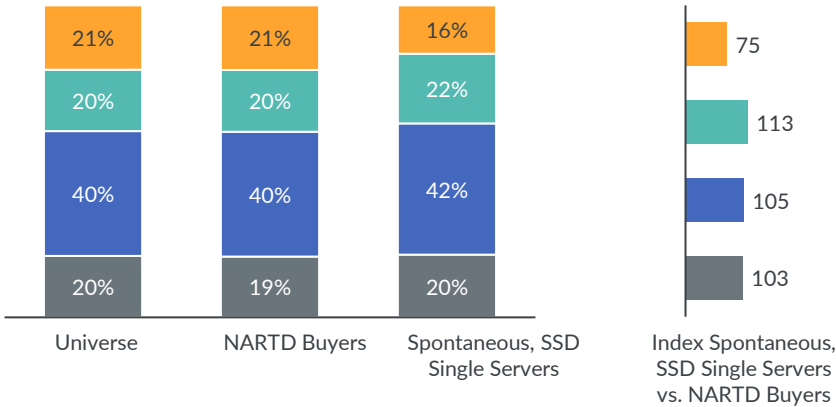
Sociodemographics & Financial Situation

Spontaneous, SSD Single Servers



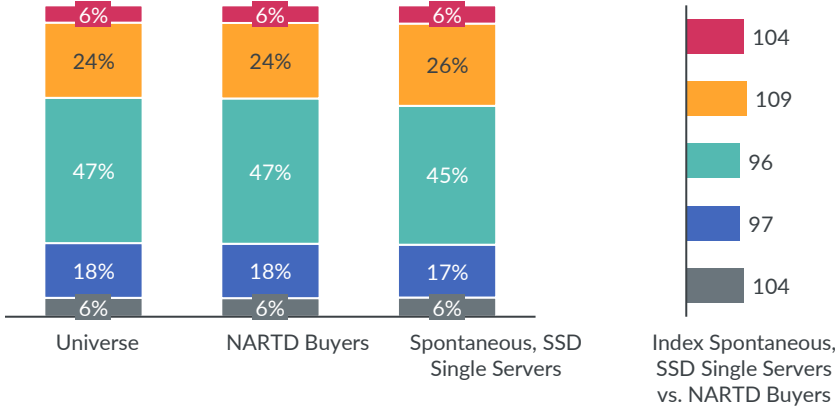
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



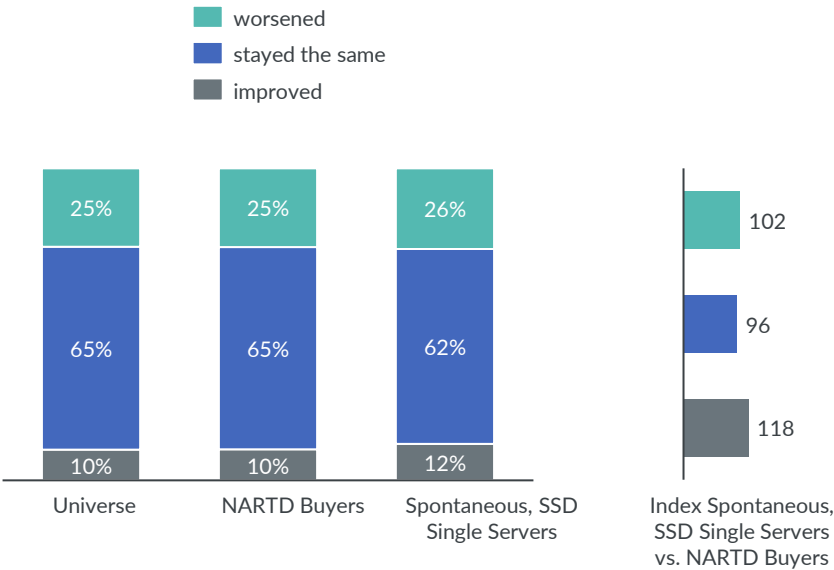
Sociodemographics & Financial Situation

Spontaneous, SSD Single Servers



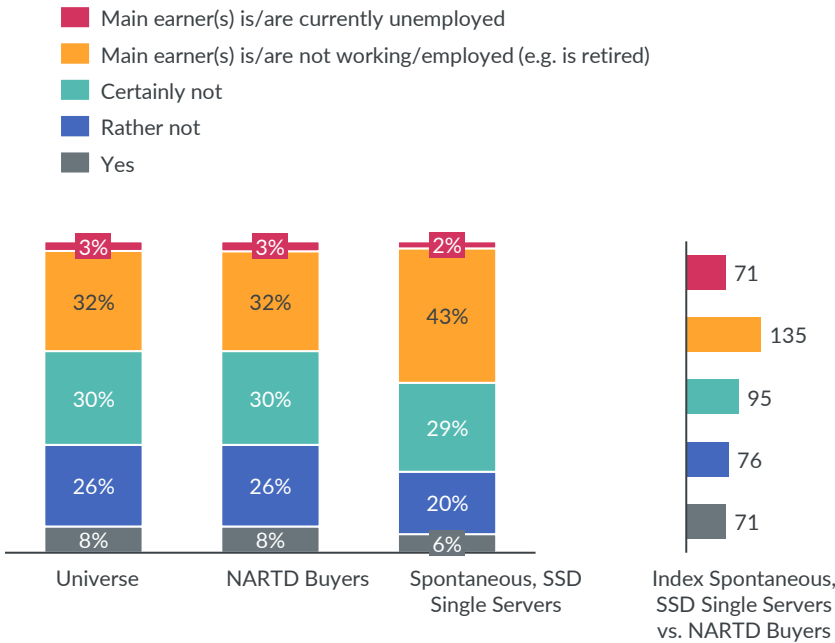
Future Financial Situation

Do you think that in 12 months your financial situation will have



Employment

Could the employment of the main earner(s) in your household be at risk?



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2













Personal attitudes & Leisure preferences

top and flop statements



Spontaneous, SSD Single Servers

Visiting training / continuing education courses	8%	 154
Doing handicrafts/needlework	18%	 137
Volunteering/ getting involved in activities of civil society organizations	14%	 130
Baking for pleasure	22%	 121
Going to the theatre	11%	 120
Spending time with the family	52%	 100
Visiting concerts	16%	 99
Meditating, praying, going to church	4%	 91
Going to the cinema	16%	 87
Going to clubs/ nightclubs	2%	 65

Share of agreement
NARTD Buyers

Index Spontaneous, SSD Single
Servers vs. NARTD Buyers

- Leisure activities of the target group in focus are rather calm and both in & out of home.
- They are not fond of clubbing & cinema trips.

Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

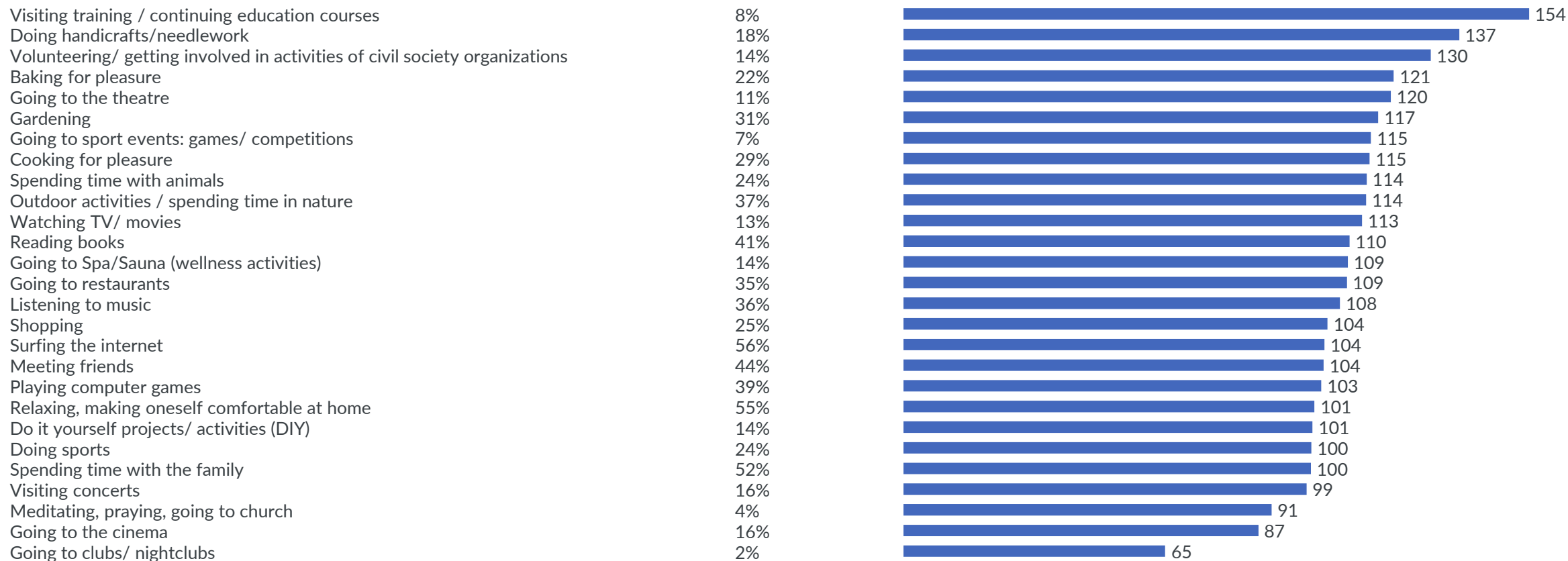
2



Personal attitudes & Leisure preferences



Spontaneous, SSD Single Servers



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

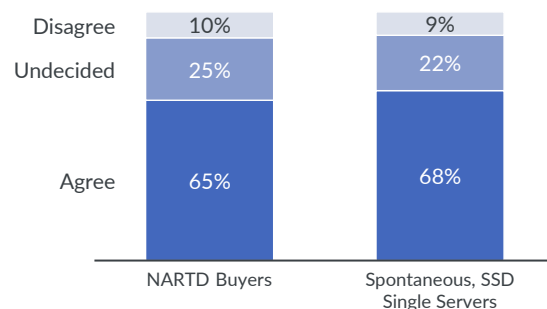


Personal attitudes & Leisure preferences

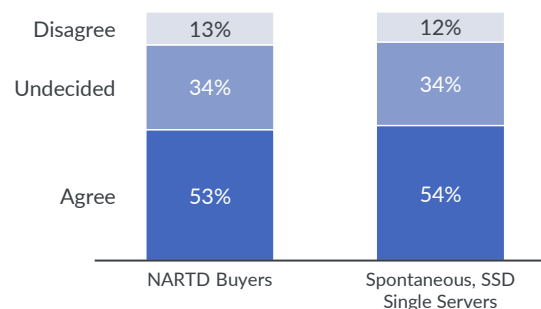


Spontaneous, SSD Single Servers

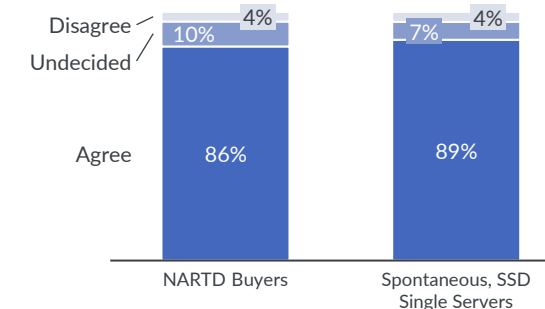
I like to be among people and enjoy socializing.



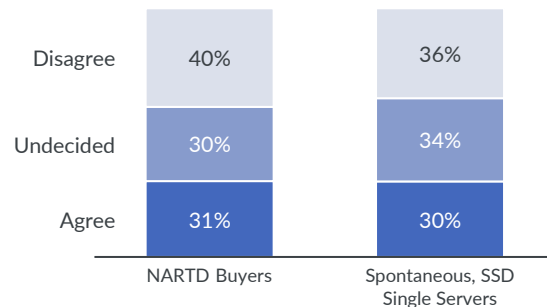
I do not like changes in my lifestyle.



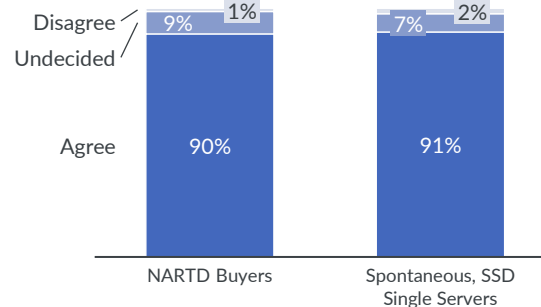
Family means a lot to me.



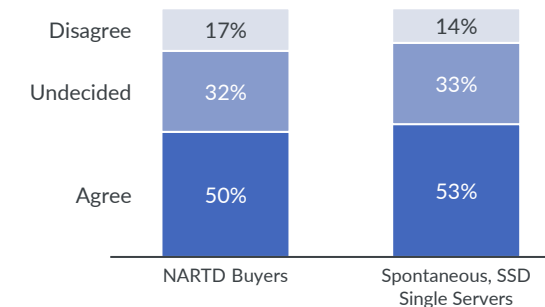
I do not worry about my future financial situation when I retire.



It is important to spoil yourself occasionally.



My appearance/ look is very important to me.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

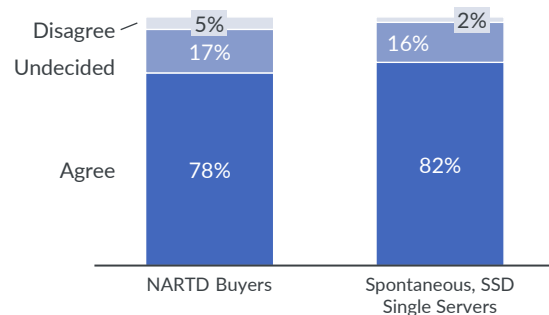


Personal attitudes & Leisure preferences

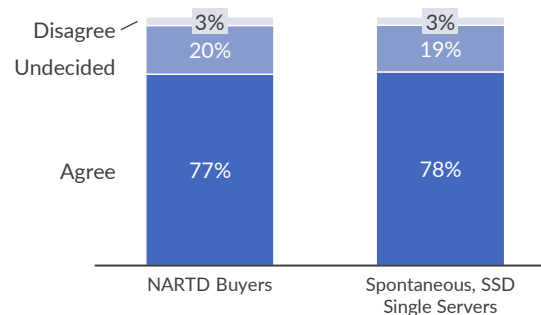


Spontaneous, SSD Single Servers

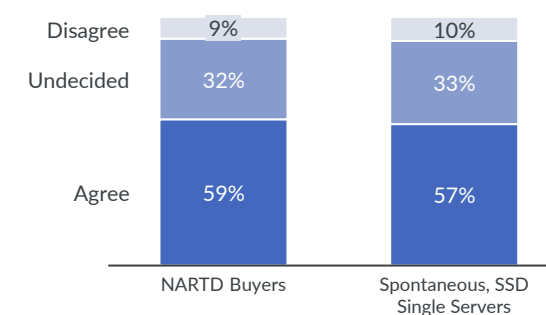
Personal care & hygiene play an important role for me.



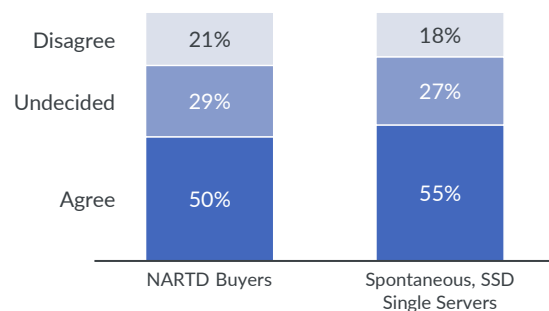
I pay a lot of attention to cleanliness and hygiene in the household.



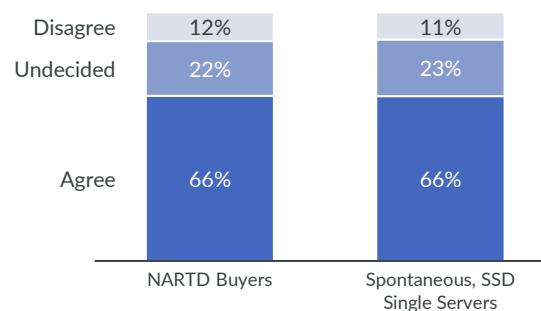
I would like to have more time and less rush in my daily routine.



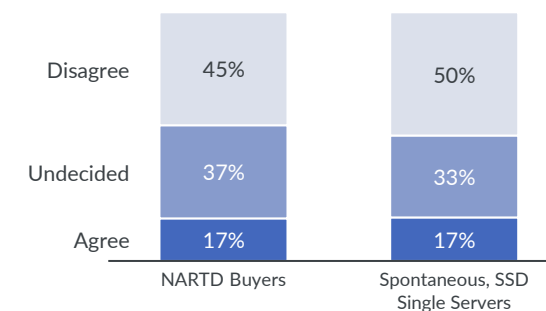
I feel I spend enough quality time with my children. only for HH with kids



I love travelling.



What is currently being done to protect the environment is quite sufficient.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

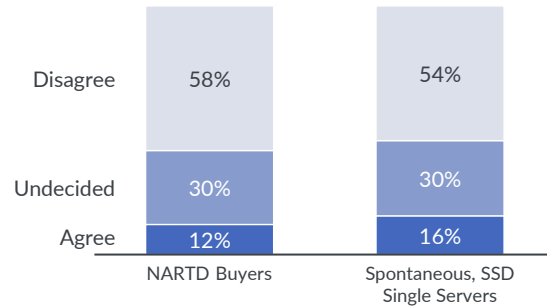


Personal attitudes & Leisure preferences



Spontaneous, SSD Single Servers

I often have newly launched products faster than my friends.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



Spontaneous, SSD Single Servers

● NARTD Buyers

● Spontaneous, SSD Single Servers

Enjoying life in the here and now			● ●		Thinking about tomorrow
Buying what you like				● ●	Buying what is necessary
Being careful			● ●		Daring something/ taking risk
Living an active exciting life				● ●	Living a quiet, secluded life
Shopping for groceries is fun			● ●		Shopping groceries is annoying
I like to buy things that nobody else has				● ●	I don't care if others have the same products
When shopping, I pay particular attention to price			● ●		When shopping, I pay particular attention to quality

I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

I consciously pay attention to a healthy diet.	59%	<div></div> 122
I do a lot for my health.	48%	<div></div> 119
I take care of my inner, mental health/balance.	54%	<div></div> 112
When eating and drinking I watch my figure.	46%	<div></div> 111
I exercise regularly to stay fit.	50%	<div></div> 109
I like to spoil myself with good food.	83%	<div></div> 106
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 102
I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 67

Share of agreement
NARTD Buyers

Index Spontaneous, SSD Single
Servers vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



Spontaneous, SSD Single Servers

- The focus target group pays attention to a healthy diet & health in general.
- Feeding the children what they want is not "top of mind" in the target group.

Nutrition & Health

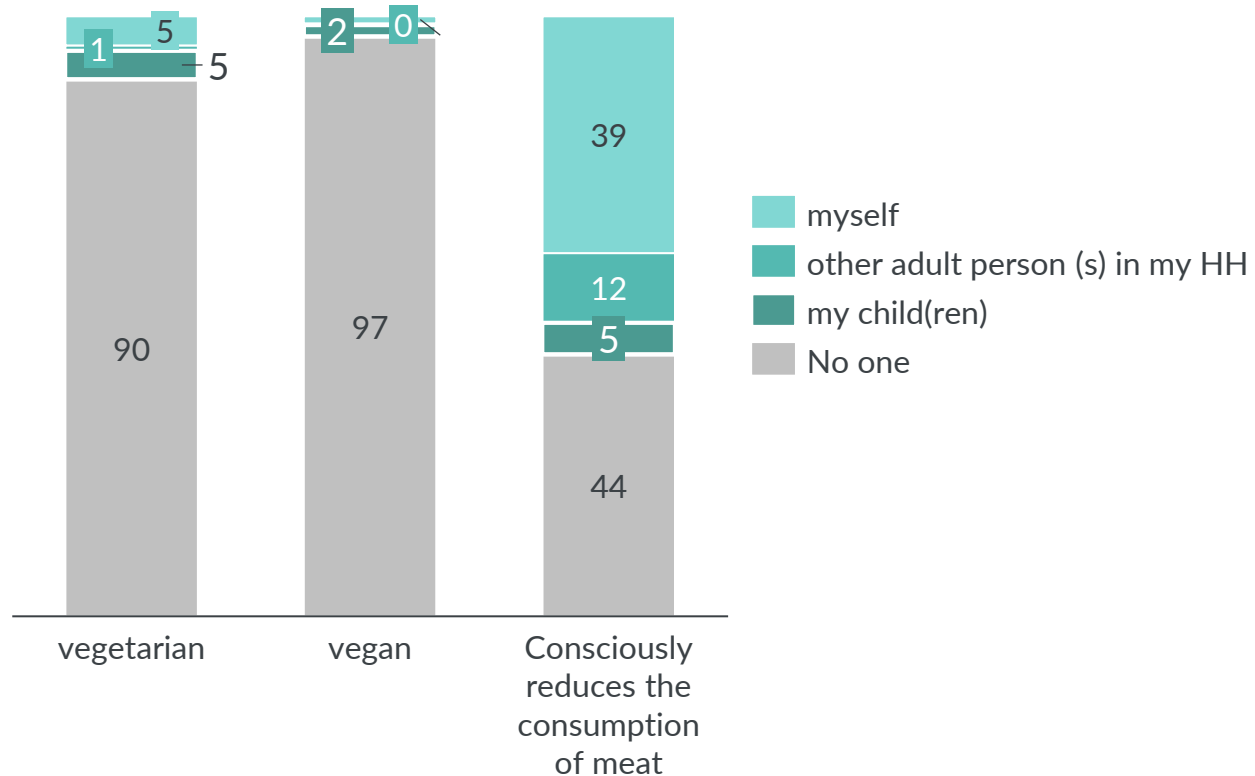
Special Nutrition patterns

3



Nutrition & Health

Share of different nutrition styles in the households



Spontaneous, SSD Single Servers

- The focus target group pays attention to their meat consumption, but abstains from a purely plant-based diet

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

Diabetes	10%	144
High cholesterol level	13%	128
I prefer not to answer	3%	121
Skin problems	6%	112
Other allergies or intolerances	9%	108
Lactose intolerance	7%	107
High blood pressure	10%	101
No, relevant health conditions with impact on shopping behavior	60%	92
Others, not mentioned here	4%	91
Coeliac disease (gluten intolerance)	2%	29

Share of agreement
NARTD Buyers

Index Spontaneous, SSD Single
Servers vs. NARTD Buyers



Spontaneous, SSD Single Servers

- The focus target group has comparatively more health problems. Especially high occurrence of diabetes.

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption



Cooking & OOH Consumption

Spontaneous, SSD Single Servers

I love to cook fancy/exceptional dishes and meals.	19%	<div></div> 133
I often order takeaway food, delivered at home or for pick up).	7%	<div></div> 128
I often eat out (canteen, cafe, restaurant, etc.).	13%	<div></div> 124
I like to cook.	60%	<div></div> 108
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	<div></div> 99
The easier the cooking, the more I like it.	45%	<div></div> 99
At home we cook hot meals every day/very often.	82%	<div></div> 98
I prefer to cook meals that do not take a lot of time to prepare.	46%	<div></div> 97
I often eat quickly and 'on the go'.	10%	<div></div> 80

Share of agreement
NARTD Buyers

Index Spontaneous, SSD Single
Servers vs. NARTD Buyers

- the target group likes to cook (fancy meals) at home.
- The use of eating 'on the go' play a rather subordinate role, while takeaway food & eating out is important.

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

 Spontaneous, SSD Single Servers



Purchase preferences

What do shoppers consider when they purchase?

5

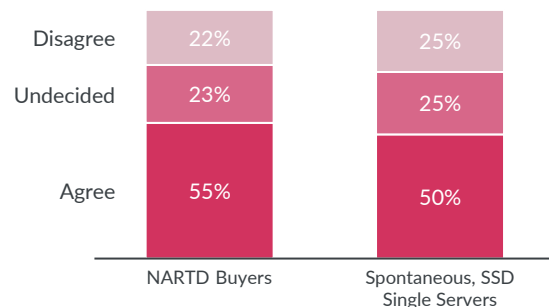


Purchase Preferences

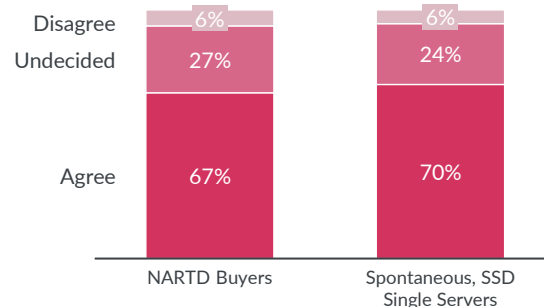


Spontaneous, SSD Single Servers

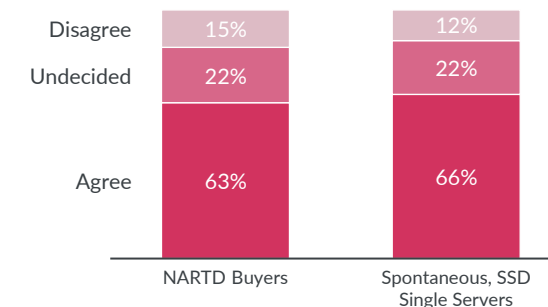
Before I go shopping, I regularly check the offers of the stores (advertisements, leaflets ...).



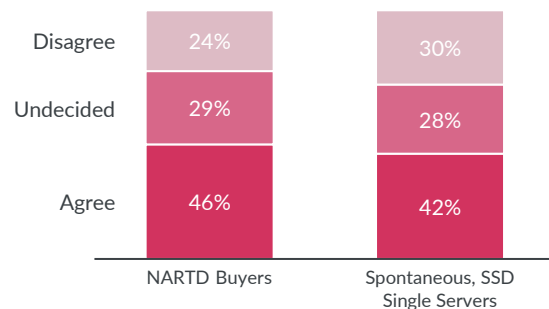
I prefer to purchase in stores, that I can reach quickly.



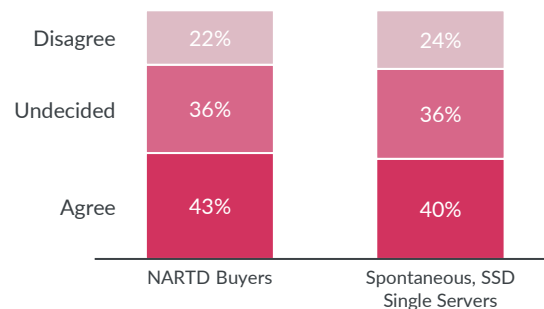
I want to buy everything I need in just one store, if possible.



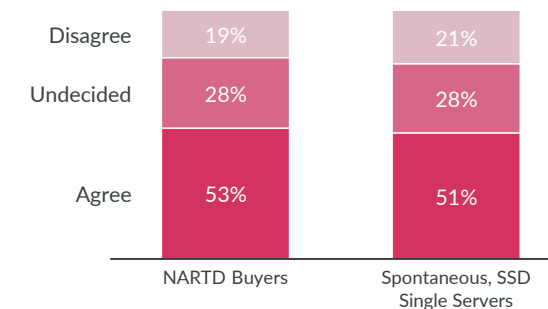
I shop in different stores to find the best prices and special offers.



When shopping, I only consider stores that I know offer the lowest prices.



Before buying something, I always compare the prices of the brands.

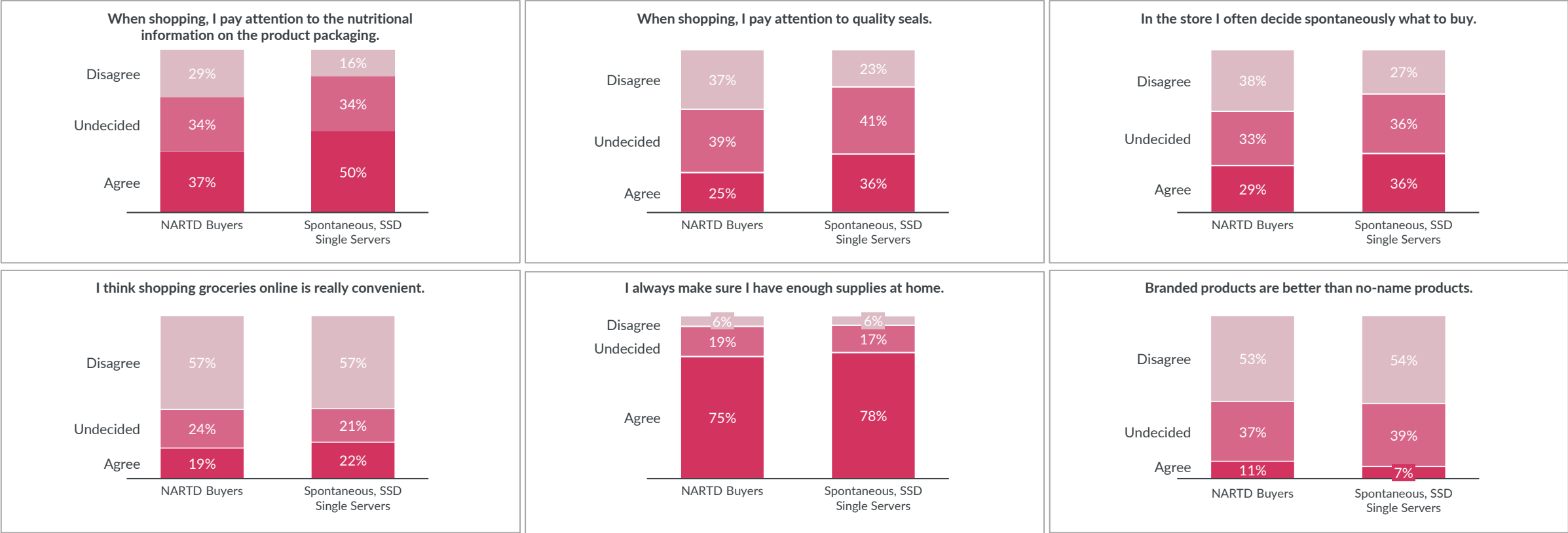


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

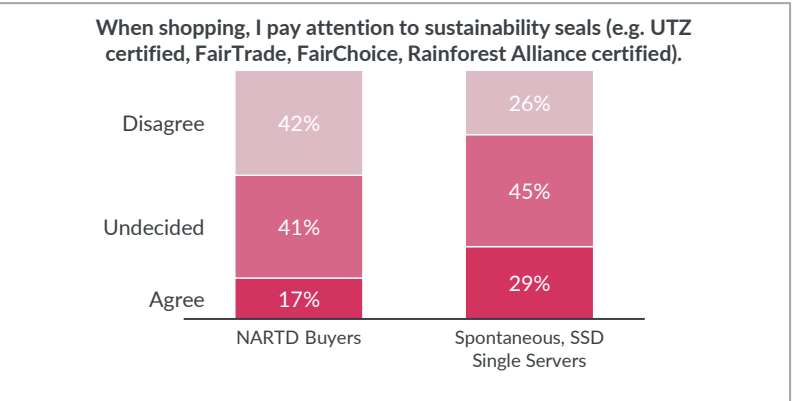
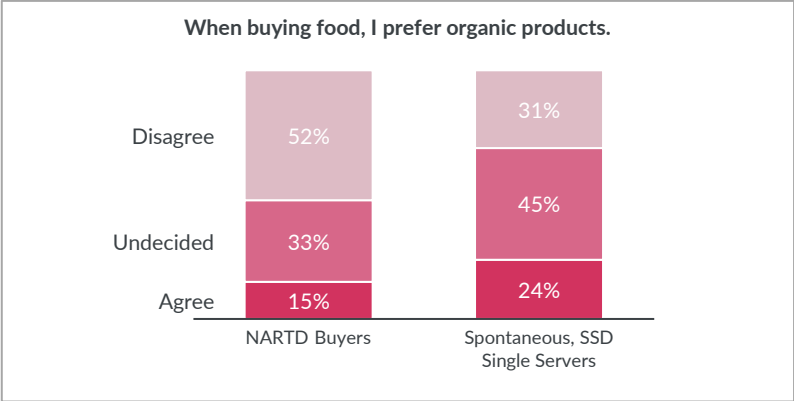
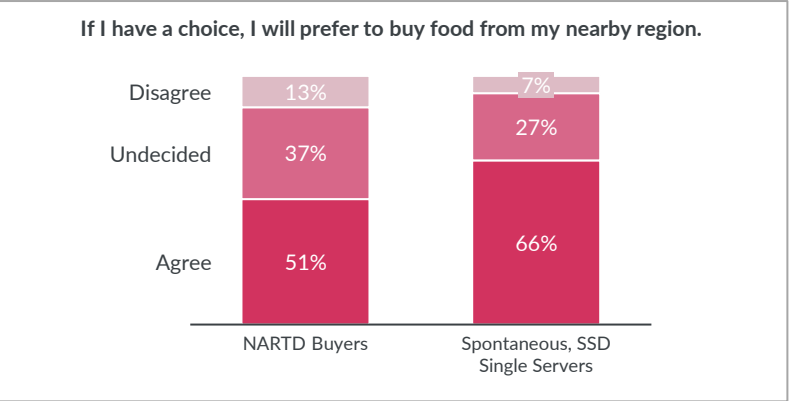
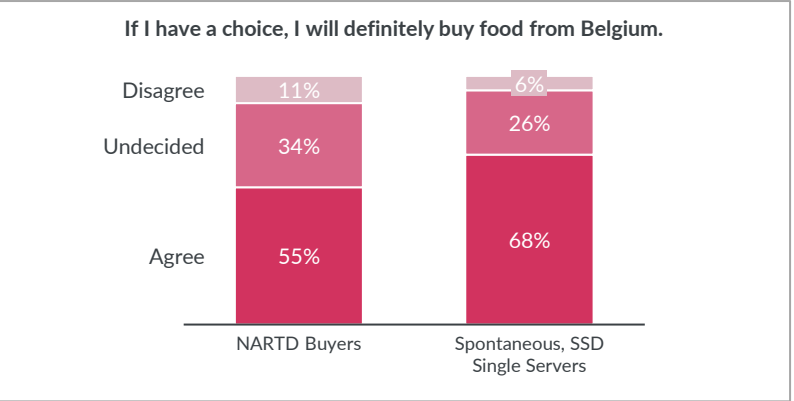
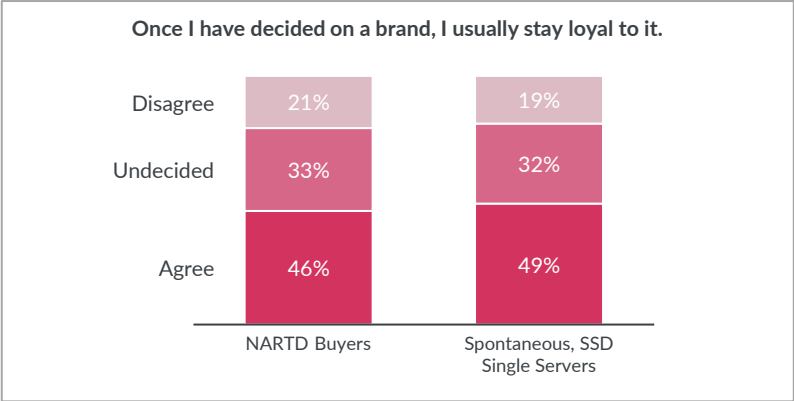


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



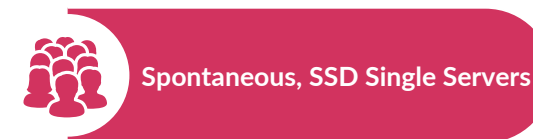
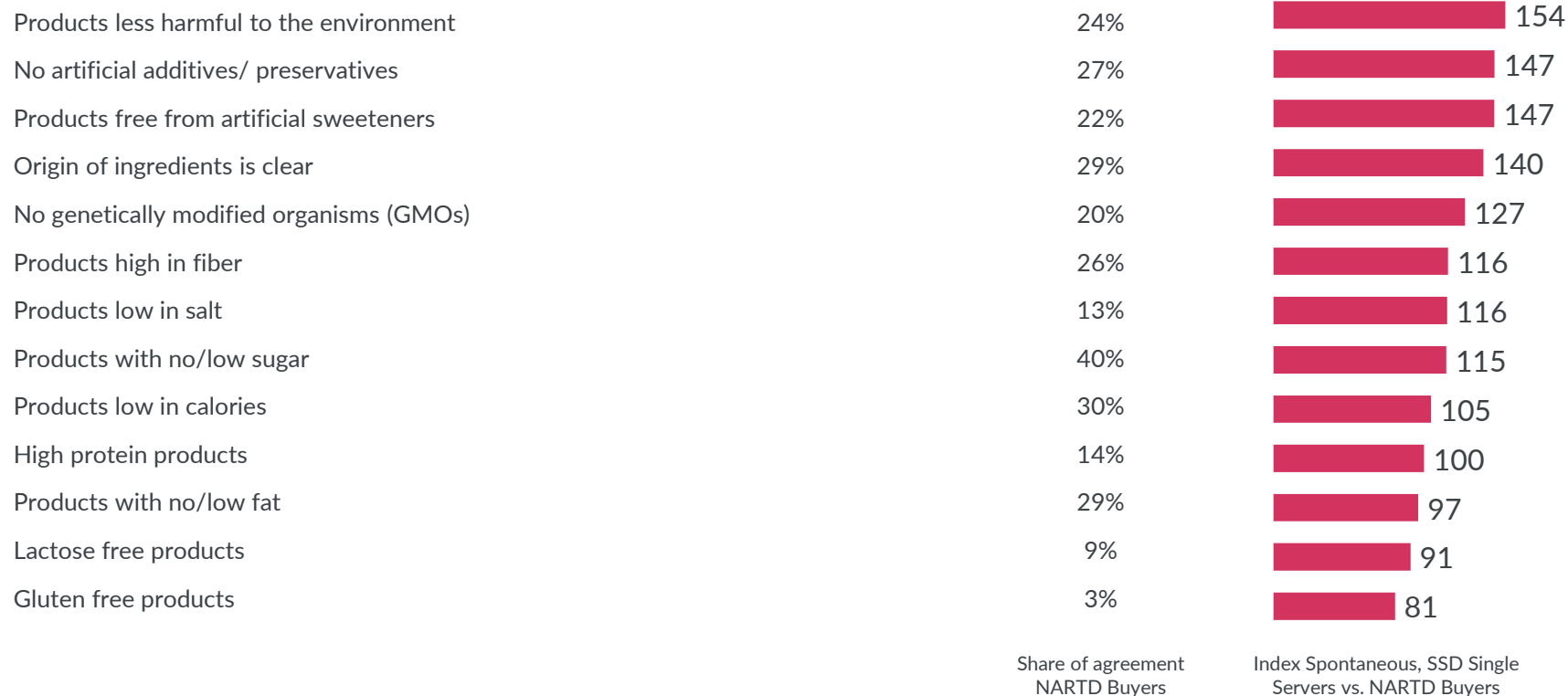
Purchase preferences

What do shoppers consider when they purchase?

5



Purchase Preferences



- the target group likes natural, artificial free & healthy products that don't harm the environment.
- They are not fond of low fat, gluten or lactose free products.

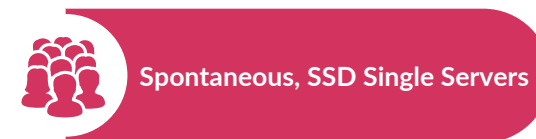
Purchase preferences

What do shoppers consider when they purchase?

5



Purchase Preferences



Organic / bio products	9%	<div></div> 170
Environmentally friendly packaging	37%	<div></div> 154
Products without long transport	21%	<div></div> 146
Products made from natural ingredients	37%	<div></div> 135
Fairly produced and traded products	24%	<div></div> 134
Climate-neutral / carbon-neutral products	8%	<div></div> 122
Products contributing to animal welfare	25%	<div></div> 112
Products which are produced in an environmentally friendly manner	24%	<div></div> 106
Products free from palm oil	22%	<div></div> 101

Share of agreement
NARTD Buyers

Index Spontaneous, SSD Single
Servers vs. NARTD Buyers

- The target group prefers organic & climate friendly products.

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7



Important Features of Retailers

top and flop statements

Attractive organic assortment	22%	162
Availability of local/regional products	42%	147
Social & environmental responsibility	53%	146
Retailer helps me to make healthy choices	48%	131
Offer of ready-to-go / ready-to-eat products and meals	17%	130
Possibility for self-scanning / self-checkout	27%	102
Overall fair prices	95%	102
Constant availability of products, no out of stocks	91%	99
Easy to reach by car, availability of parking lot	80%	99
Attractive promotions	86%	94

Share of agreement
NARTD Buyers

Index Spontaneous, SSD Single
Servers vs. NARTD Buyers



Spontaneous, SSD Single Servers

- The target group prefers an organic, local & responsible assortment.
- They don't prioritize promotion, price or parking space at the retailer.

Important Features of Retailers

Criteria for choosing a retailer

7

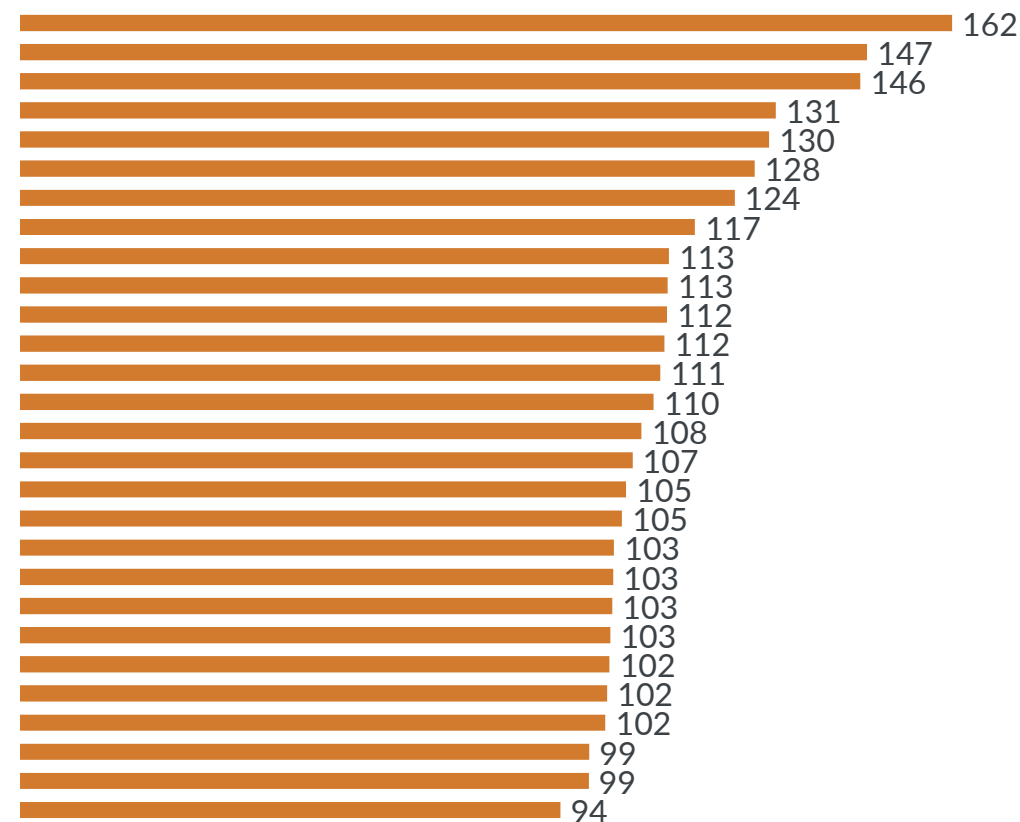


Important Features of Retailers



Spontaneous, SSD Single Servers

Attractive organic assortment	22%
Availability of local/regional products	42%
Social & environmental responsibility	53%
Retailer helps me to make healthy choices	48%
Offer of ready-to-go / ready-to-eat products and meals	17%
Retailer contributes to plastic reduction/ avoidance	66%
Retailer tries to reduce food waste	69%
Offers a delivery service	12%
Large variety in pack sizes to meet my needs	66%
Wide range of well-known brands	46%
High quality of products	76%
Nice, pleasant atmosphere	62%
Clear store layout / easy navigation	74%
Close to home/ workplace	73%
Convenient opening hours	77%
Friendly, well-trained staff	88%
Attractive private labels	77%
Quick service / short waiting time at the checkout	70%
Clean and tidy store	90%
Easy to find products on shelves	83%
Loyalty card / loyalty program	64%
Broad assortment, wide range of products	86%
Good fresh department	92%
Possibility for self-scanning / self-checkout	27%
Overall fair prices	95%
Constant availability of products, no out of stocks	91%
Easy to reach by car, availability of parking lot	80%
Attractive promotions	86%



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

8

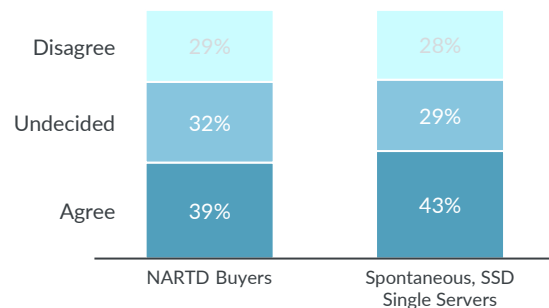


Media behavior & Advertising usage

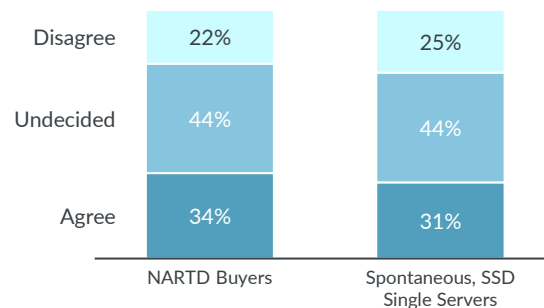


Spontaneous, SSD Single Servers

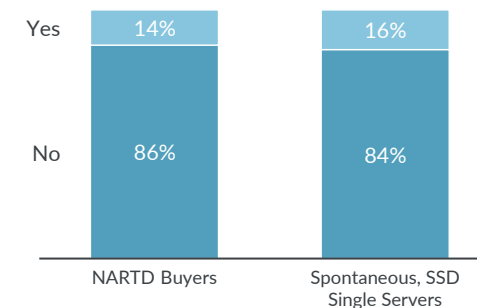
In general advertising attracts me.



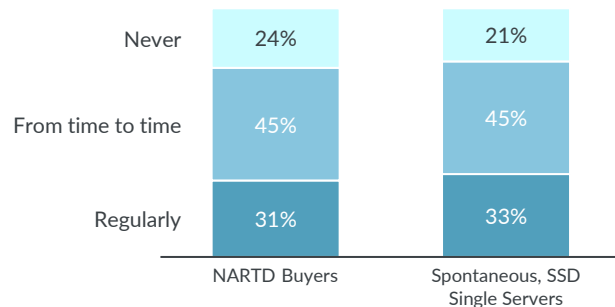
I am very suspicious of advertisements.



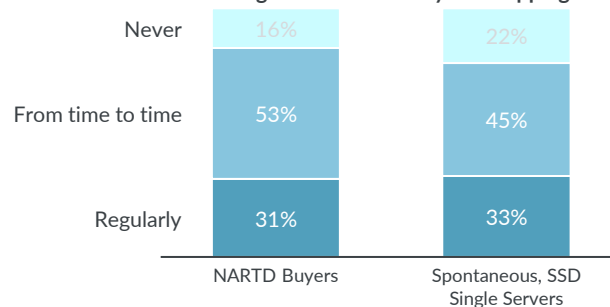
Do you have a sticker on your mailbox indicating you do not wish to receive advertising materials and leaflets?



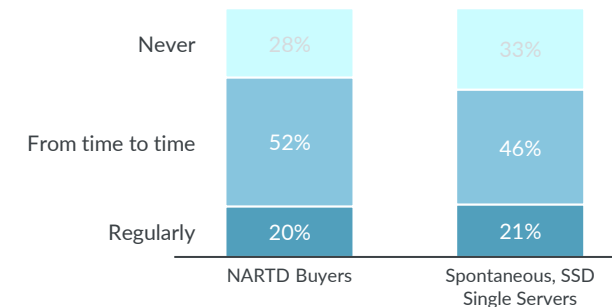
How often do you read free weekly newspapers with advertisement?



How often do you use information from advertising mail/ leaflets for your shopping?



How often do you use information from online (advertising) leaflets?



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



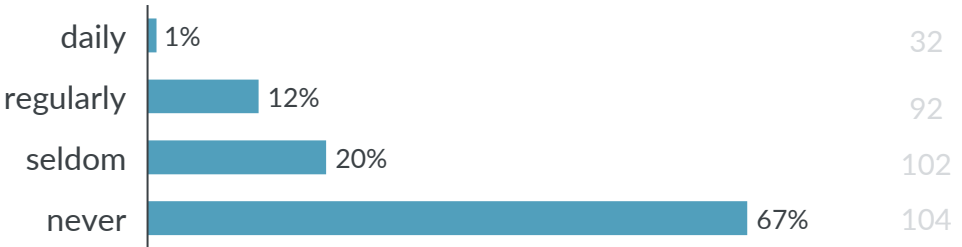
Media behavior & Advertising usage

 Spontaneous, SSD Single Servers

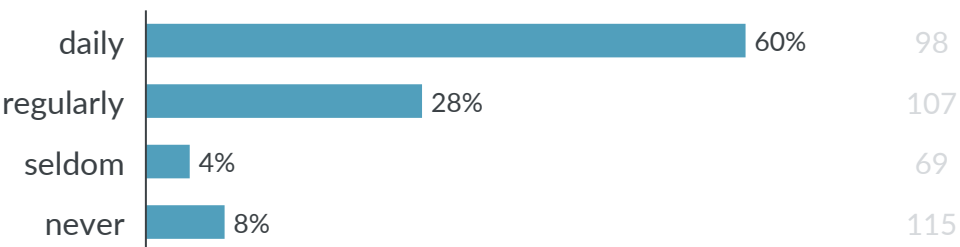
How often are you watching tv



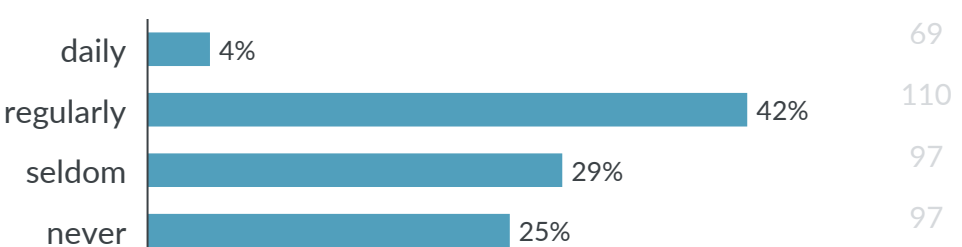
How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

8

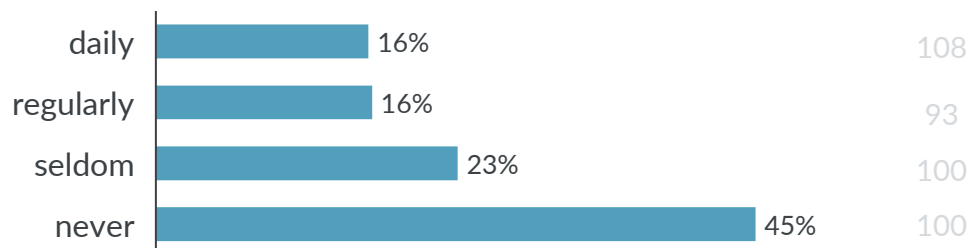


Media behavior & Advertising usage

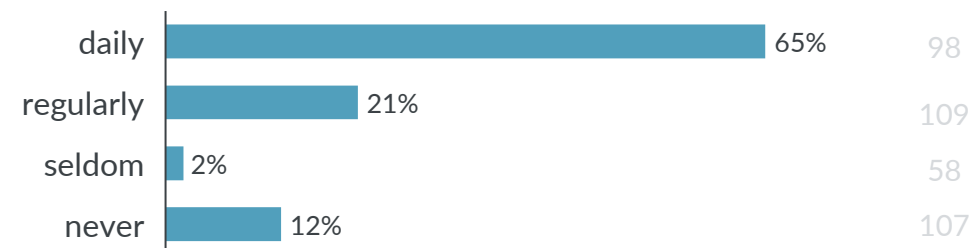


Spontaneous, SSD Single Servers

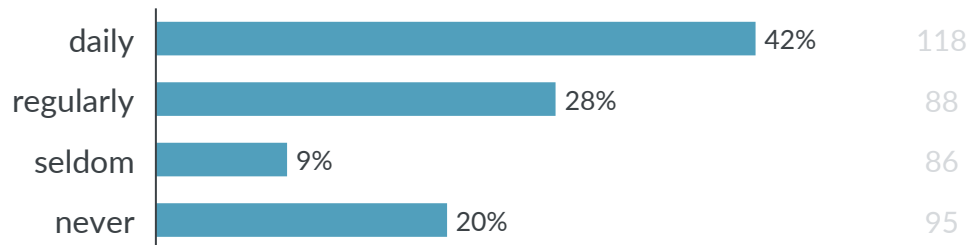
How often are you reading (printed) newspapers



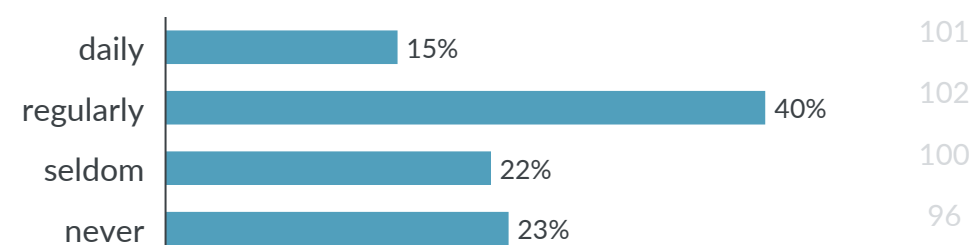
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

8

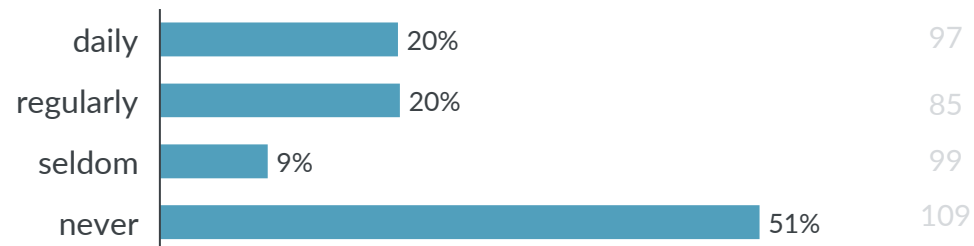


Media behavior & Advertising usage

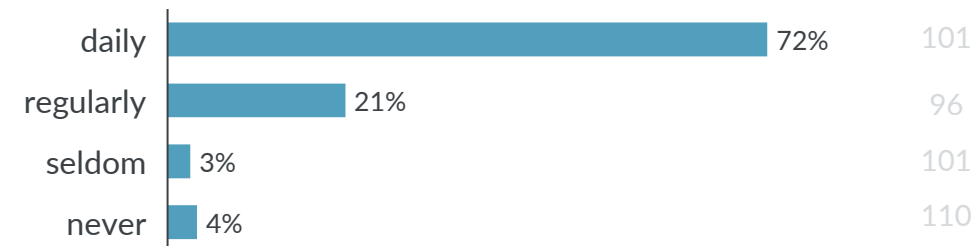


Spontaneous, SSD Single Servers

How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



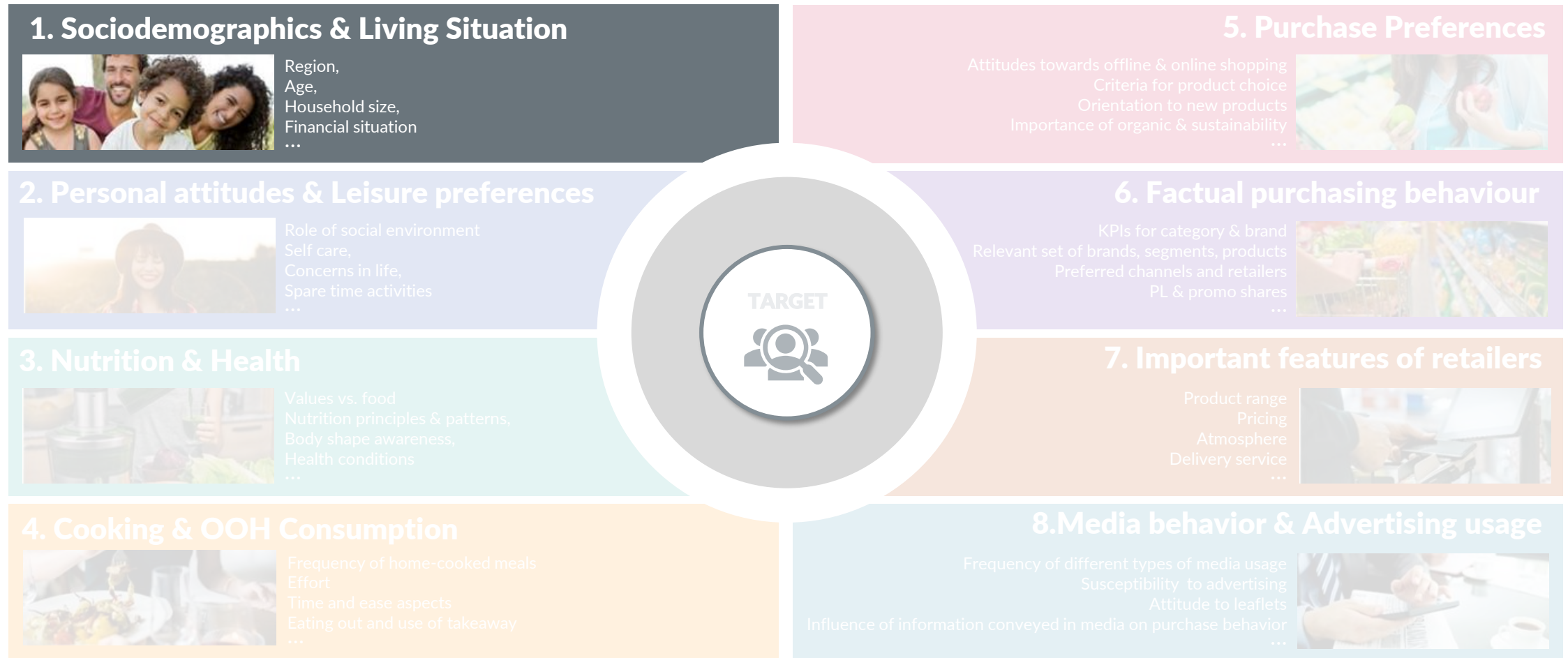
Surfing the internet (otherwise)



05

Concious NCB's

Chapter 1: Sociodemographics & Living Situation



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

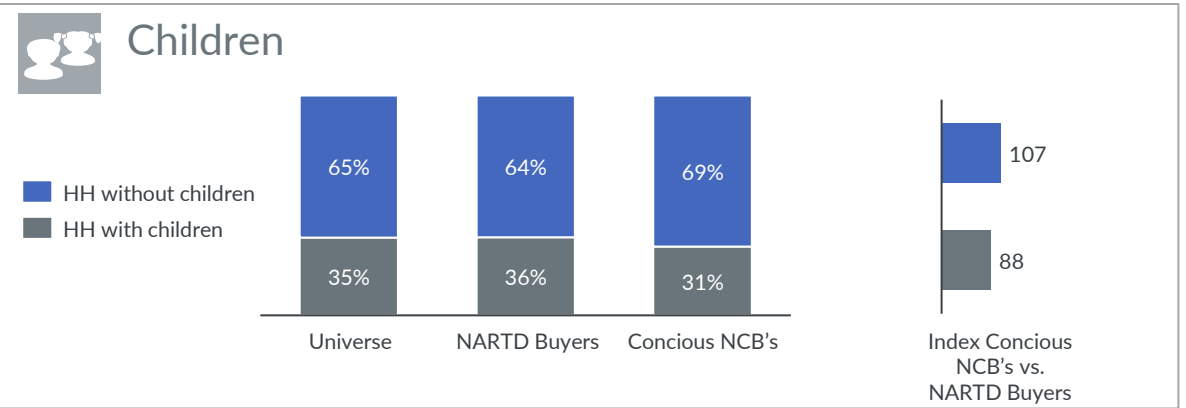
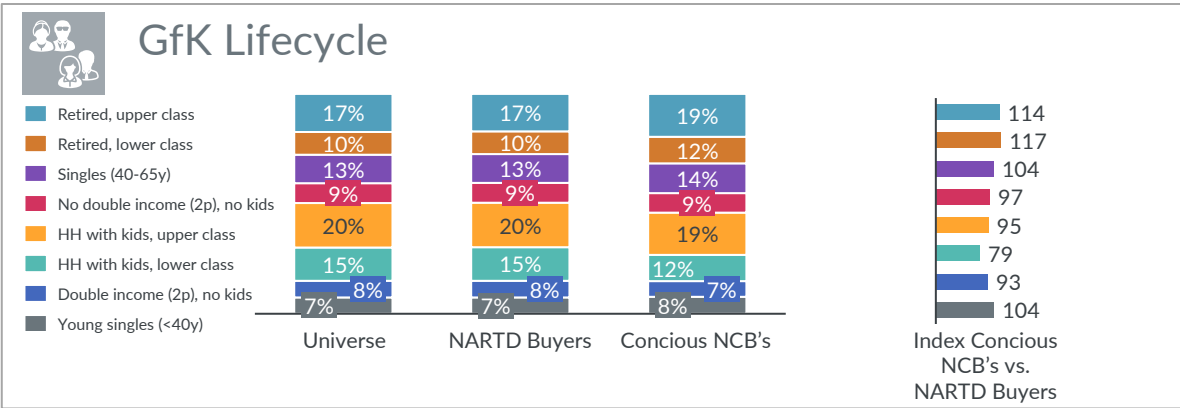
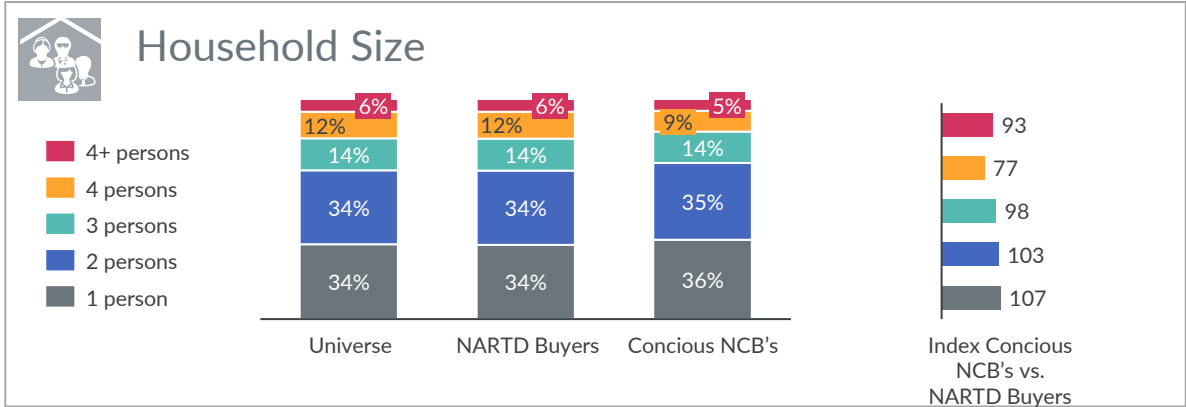
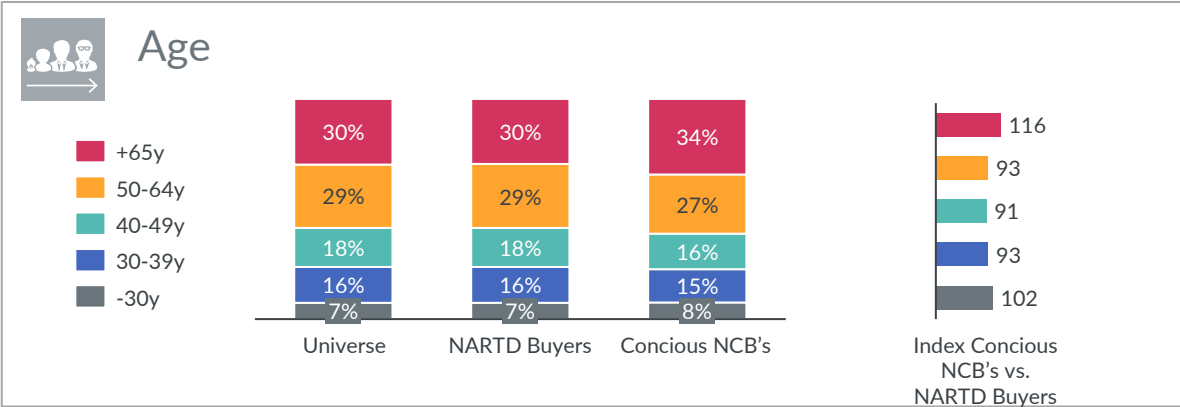


1



Sociodemographics & Living Situation

Conscious NCB's



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



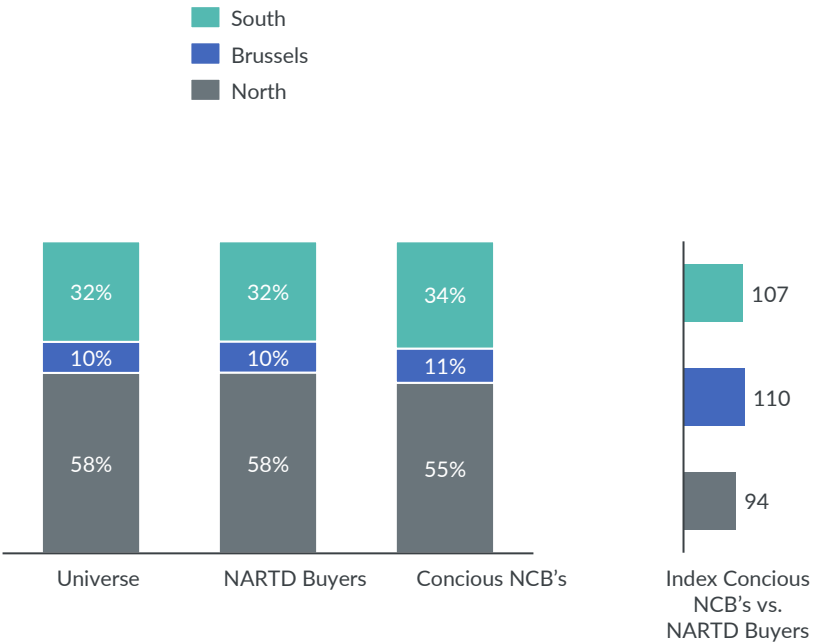
1



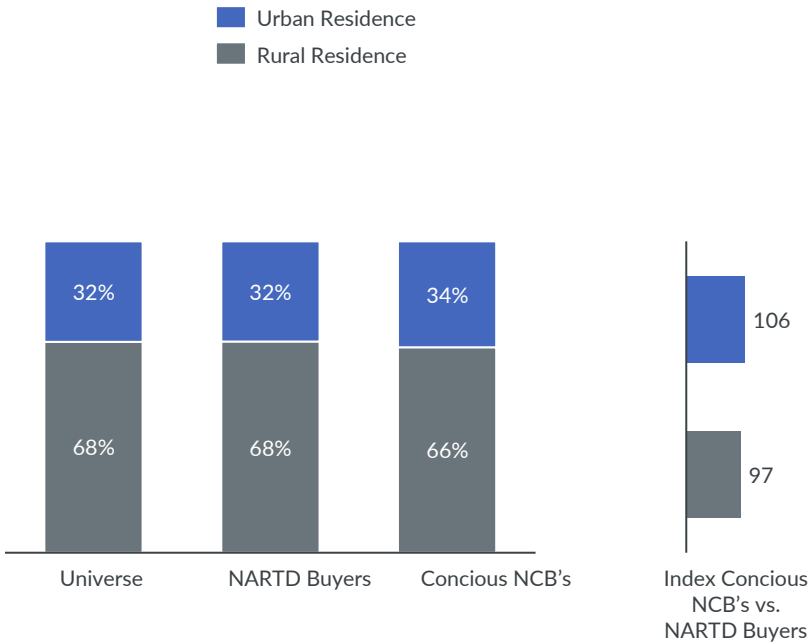
Sociodemographics & Region



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



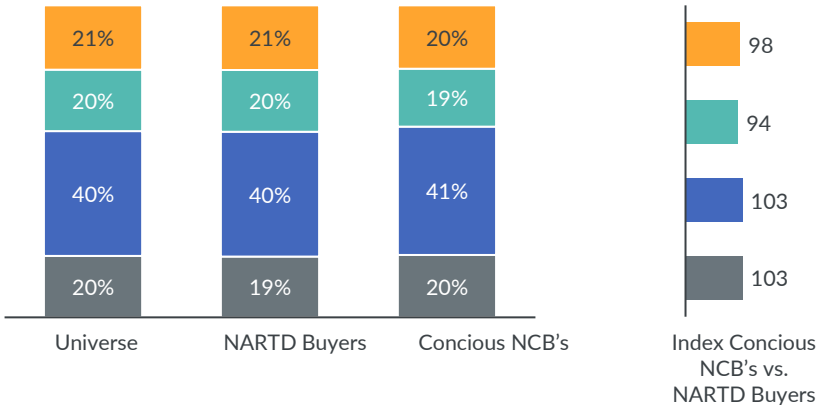
Sociodemographics & Financial Situation

Conscious NCB's



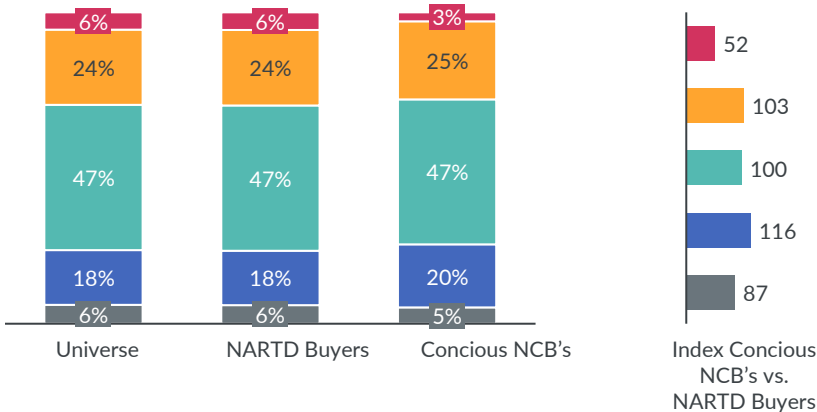
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1

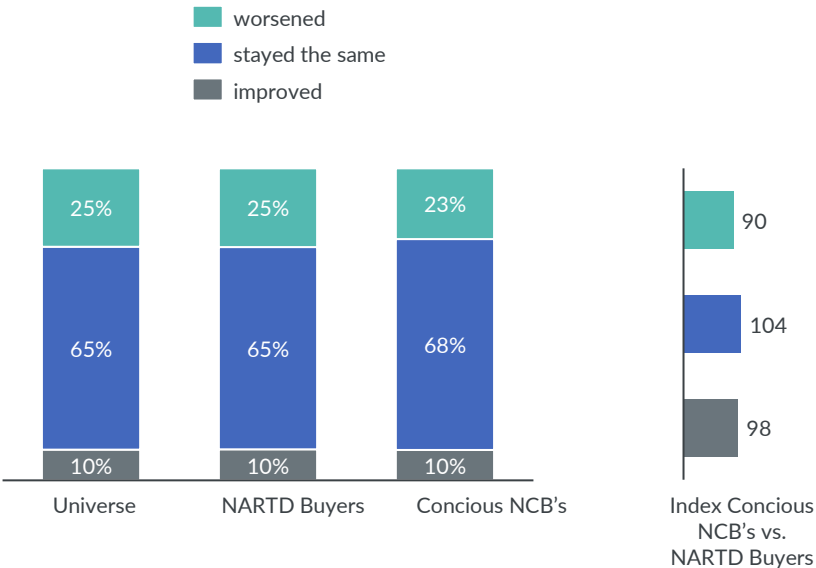


Sociodemographics & Financial Situation



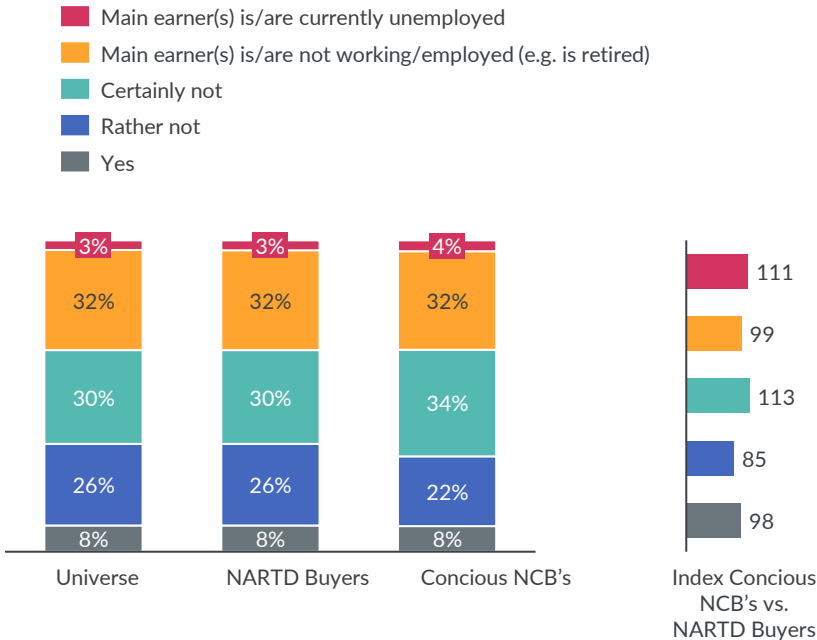
Future Financial Situation

Do you think that in 12 months your financial situation will have



Employment

Could the employment of the main earner(s) in your household be at risk?



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

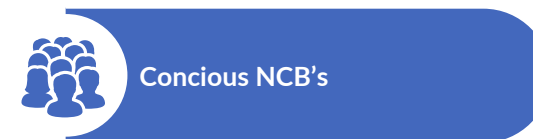
What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences

top and flop statements



Meditating, praying, going to church	4%	<div></div> 137
Going to the theatre	11%	<div></div> 127
Going to Spa/Sauna (wellness activities)	14%	<div></div> 123
Visiting concerts	16%	<div></div> 119
Outdoor activities / spending time in nature	37%	<div></div> 119
Doing handicrafts/needlework	18%	<div></div> 93
Do it yourself projects/ activities (DIY)	14%	<div></div> 92
Surfing the internet	56%	<div></div> 92
Going to sport events: games/ competitions	7%	<div></div> 79
Going to clubs/ nightclubs	2%	<div></div> 64

- Preferences of the target group in focus are rather calm, out-of-home activities.
- Very active & DIY activities are not favorable

Share of agreement
NARTD Buyers

Index Concious NCB's vs. NARTD Buyers

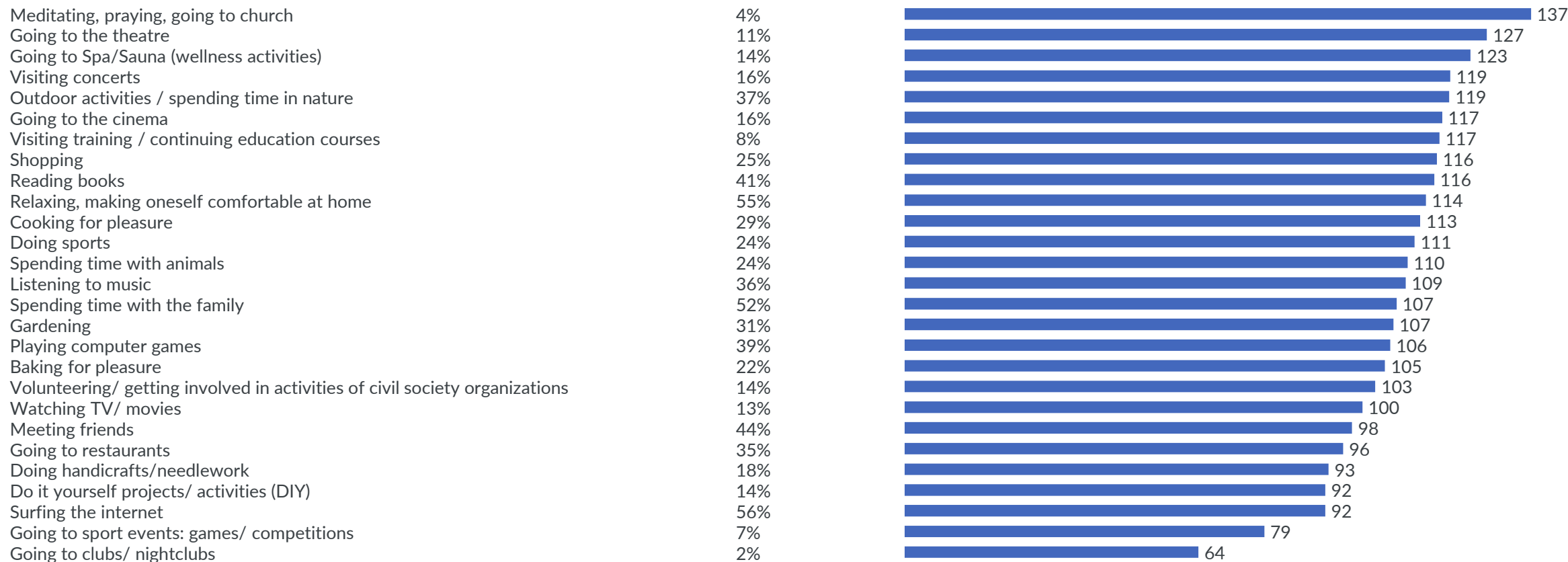
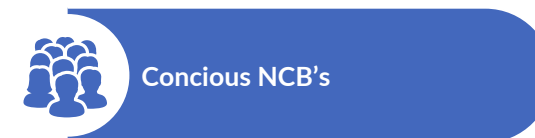
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



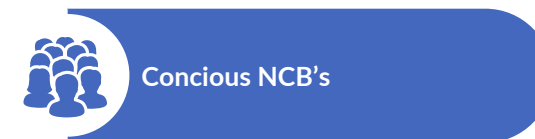
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

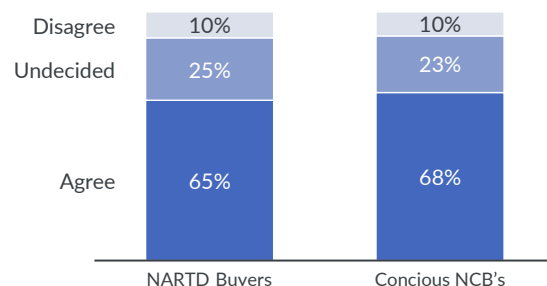
2



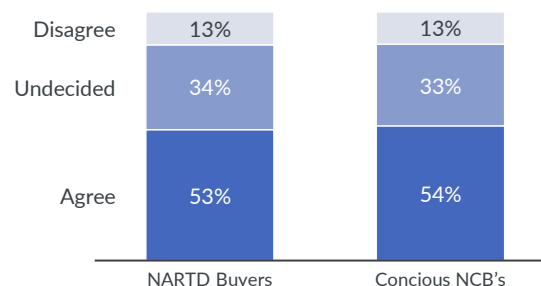
Personal attitudes & Leisure preferences



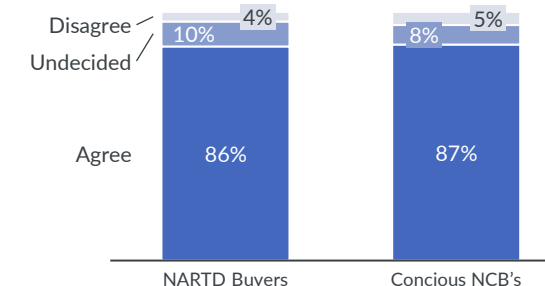
I like to be among people and enjoy socializing.



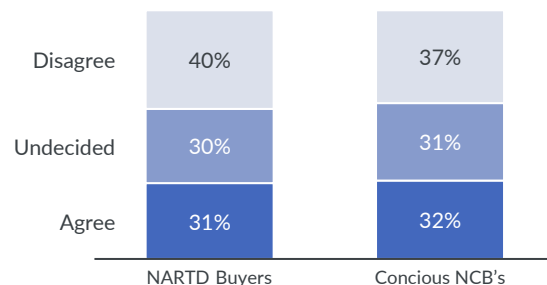
I do not like changes in my lifestyle.



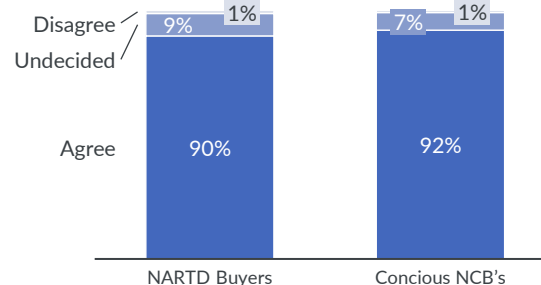
Family means a lot to me.



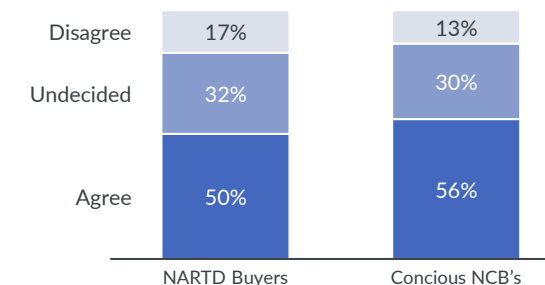
I do not worry about my future financial situation when I retire.



It is important to spoil yourself occasionally.



My appearance/ look is very important to me.

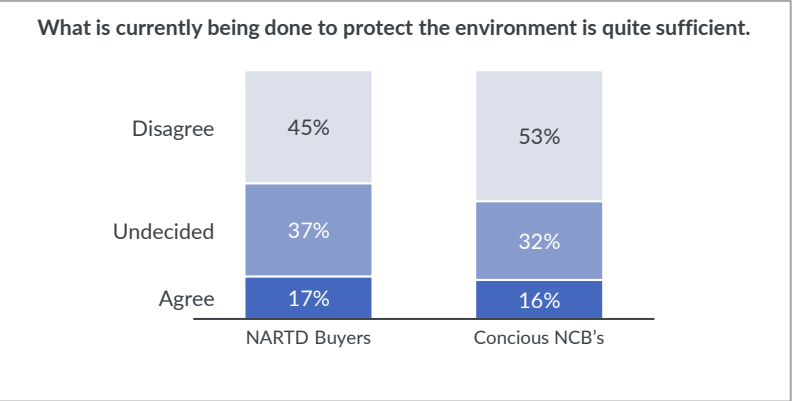
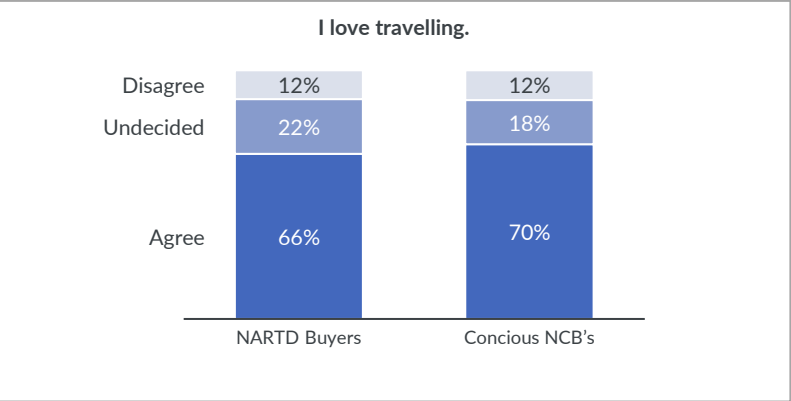
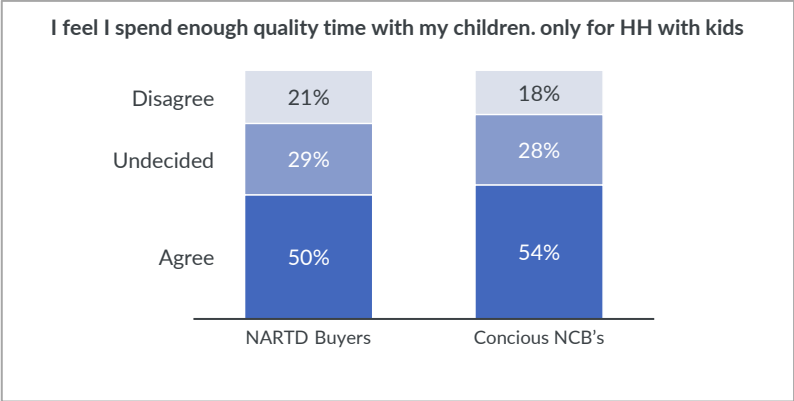
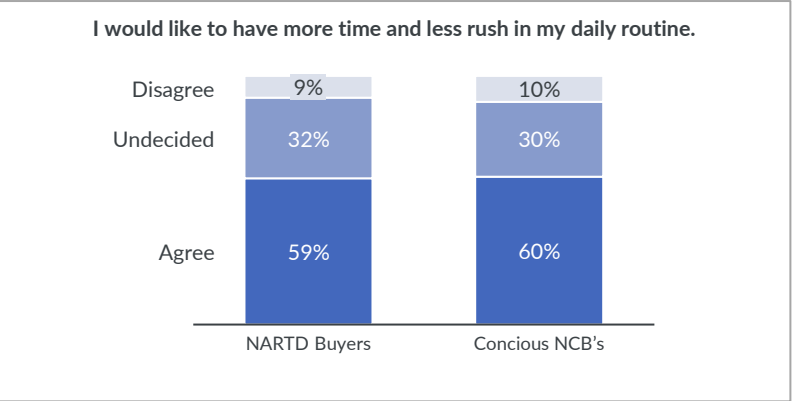
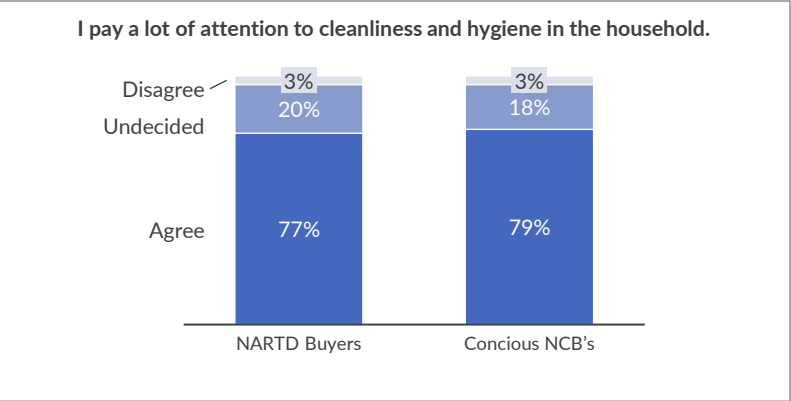
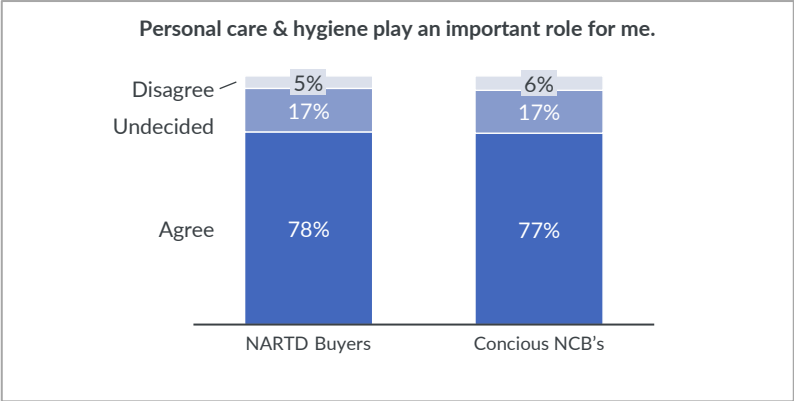


Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences



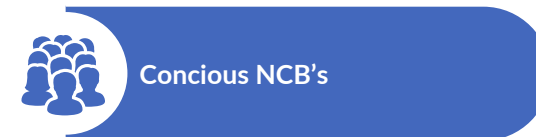
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

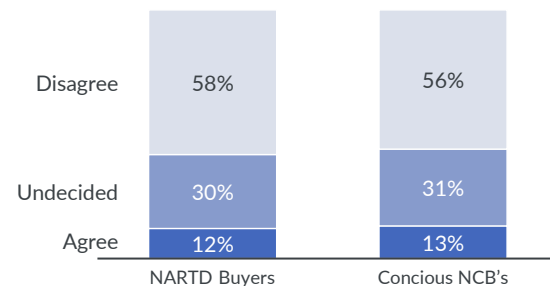
2



Personal attitudes & Leisure preferences



I often have newly launched products faster than my friends.



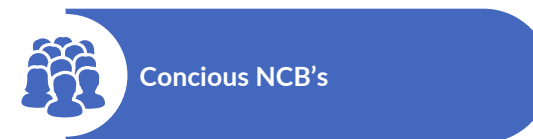
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



- NARTD Buyers
- Conscious NCB's

Enjoying life in the here and now					Thinking about tomorrow
Buying what you like					Buying what is necessary
Being careful					Daring something/ taking risk
Living an active exciting life					Living a quiet, secluded life
Shopping for groceries is fun					Shopping groceries is annoying
I like to buy things that nobody else has					I don't care if others have the same products
When shopping, I pay particular attention to price					When shopping, I pay particular attention to quality

I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

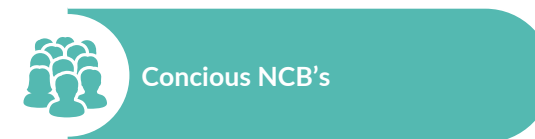
top agreement statements

I take care of my inner, mental health/balance.	54%	<div></div> 118
I do a lot for my health.	48%	<div></div> 118
I exercise regularly to stay fit.	50%	<div></div> 115
I consciously pay attention to a healthy diet.	59%	<div></div> 113
When eating and drinking I watch my figure.	46%	<div></div> 102
I like to spoil myself with good food.	83%	<div></div> 97
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 92
I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 68

Share of agreement
NARTD Buyers

Index Concious NCB's
vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



- The focus target group pays attention to both physical & mental health.
- A healthy diet is "top of mind" in the target group.

Nutrition & Health

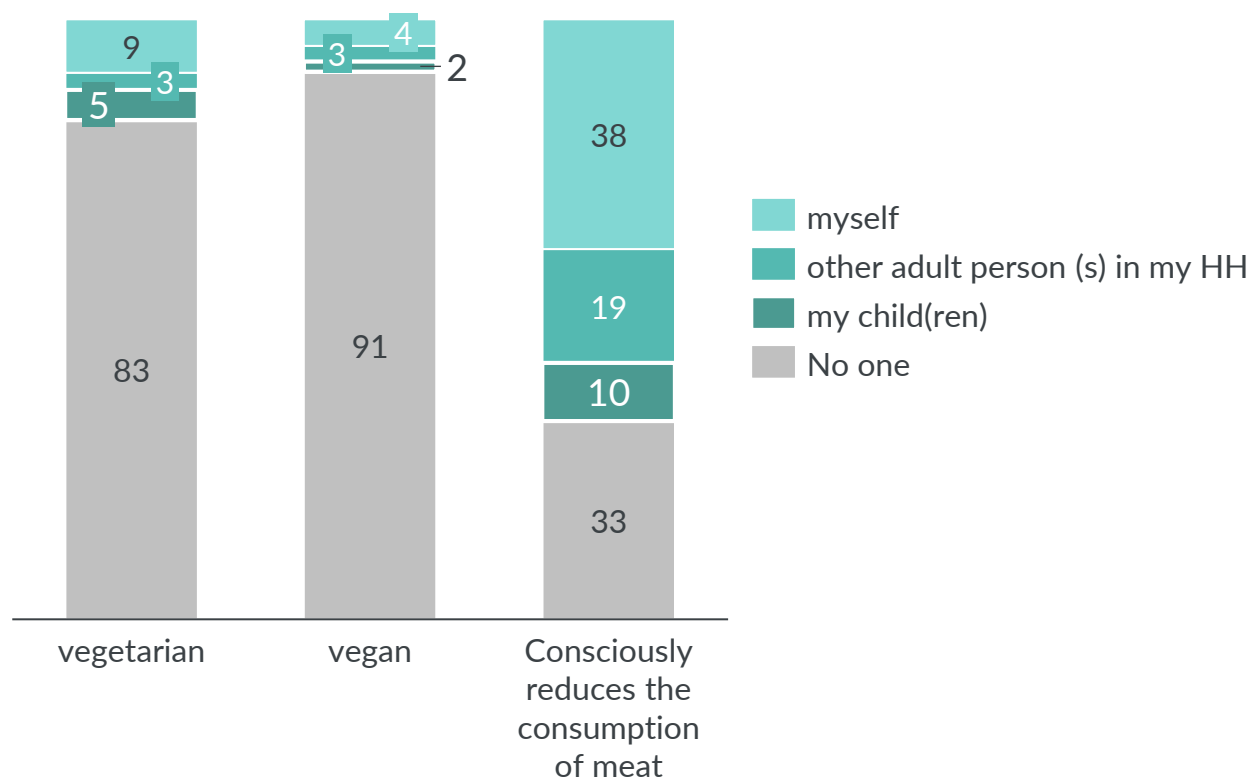
Special Nutrition patterns

3



Nutrition & Health

Share of different nutrition styles in the households



Conscious NCB's

- The focus target group pays attention to their meat consumption and has a higher share of vegetarians/vegans than the other groups.

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



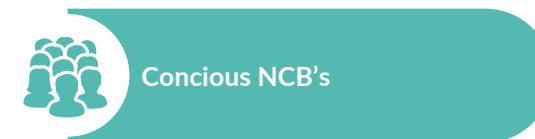
Nutrition & Health

top agreement statements

Others, not mentioned here	4%	182
Other allergies or intolerances	9%	151
Lactose intolerance	7%	125
Skin problems	6%	118
High cholesterol level	13%	107
Coeliac disease (gluten intolerance)	2%	106
High blood pressure	10%	95
No, relevant health conditions with impact on shopping behavior	60%	94
Diabetes	10%	73
I prefer not to answer	3%	65

Share of agreement
NARTD Buyers

Index Conscious NCB's
vs. NARTD Buyers



- The focus target group has comparatively few health problems but is over indexing on less common problems, allergies or intolerances.

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption

4



Cooking & OOH Consumption



I like to cook.	60%	<div></div> 103
I often eat quickly and 'on the go'.	10%	<div></div> 103
The easier the cooking, the more I like it.	45%	<div></div> 103
At home we cook hot meals every day/very often.	82%	<div></div> 101
I love to cook fancy/exceptional dishes and meals.	19%	<div></div> 101
I prefer to cook meals that do not take a lot of time to prepare.	46%	<div></div> 98
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	<div></div> 87
I often eat out (canteen, cafe, restaurant, etc.).	13%	<div></div> 84
I often order takeaway food, delivered at home or for pick up).	7%	<div></div> 65

Share of agreement Index Concious NCB's vs. NARTD Buyers
NARTD Buyers

- the target group likes to cook easy meals at home and often eats on-the-go.
- The use of convenience products, takeaway food and eating outplay a rather subordinate role.

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

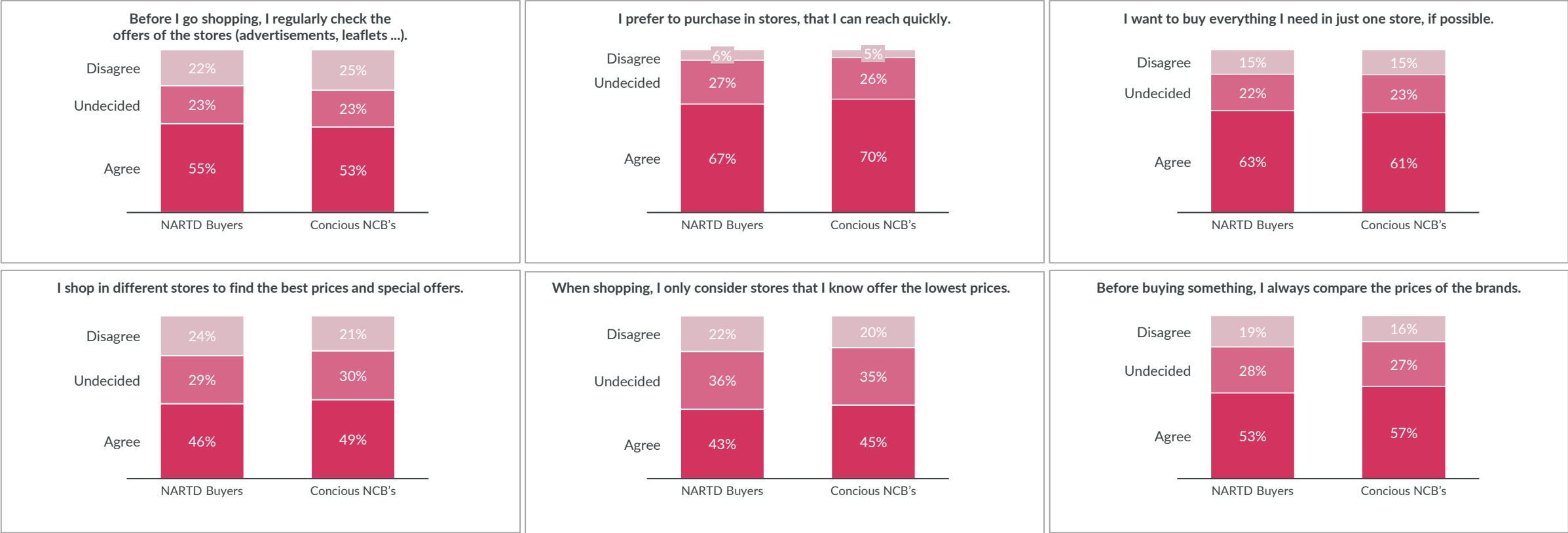


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

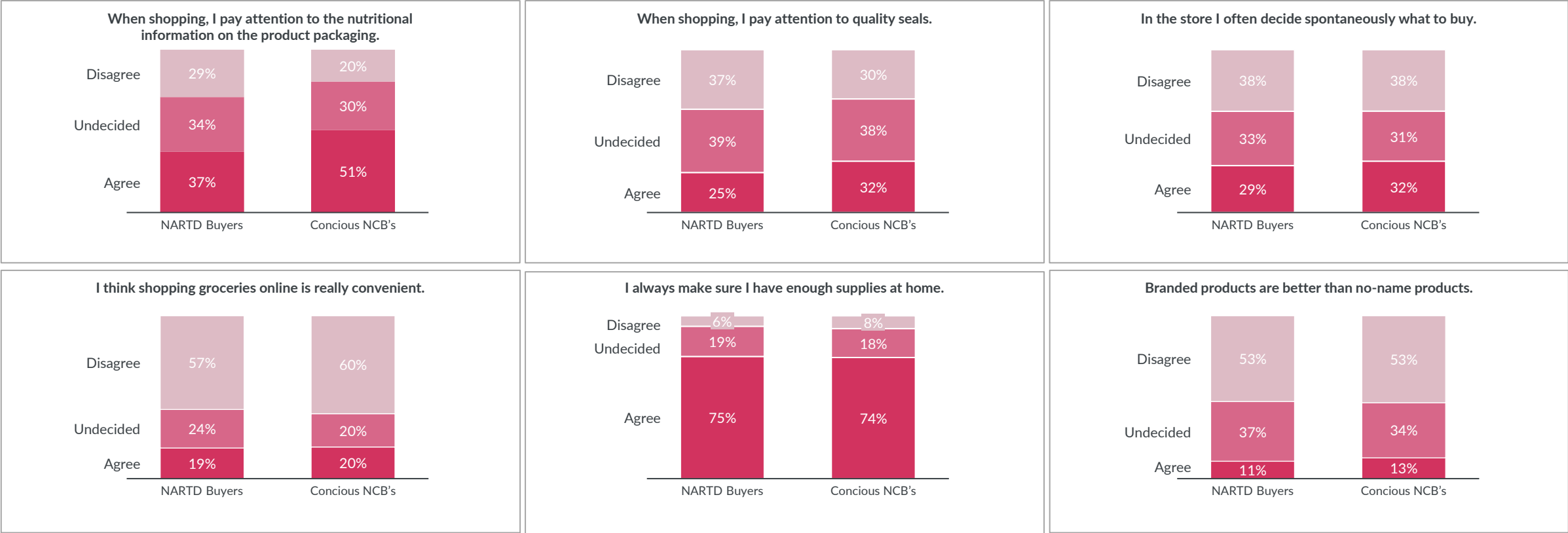


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

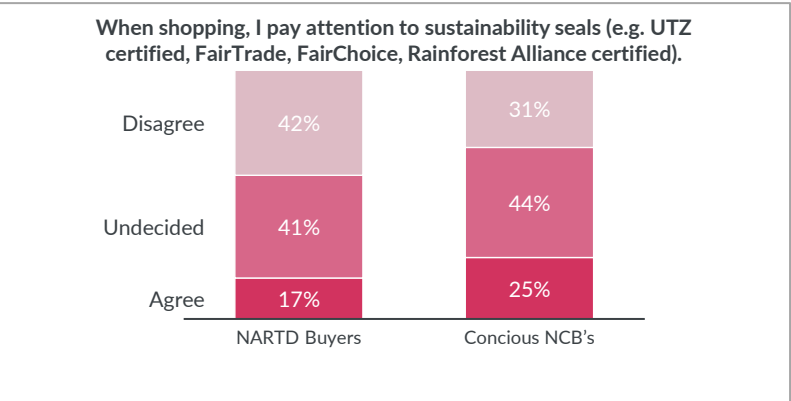
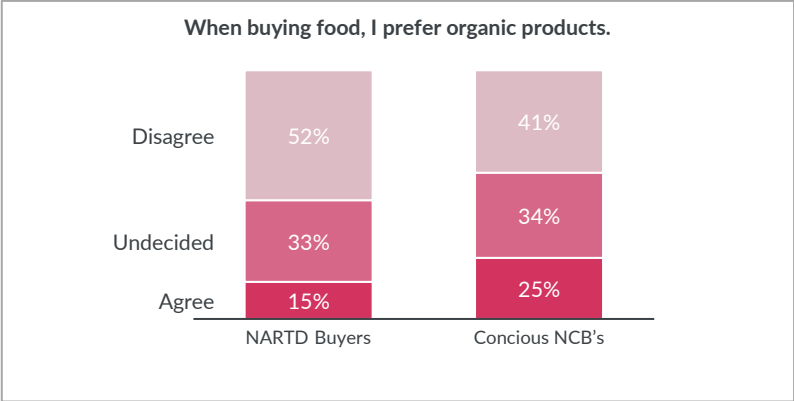
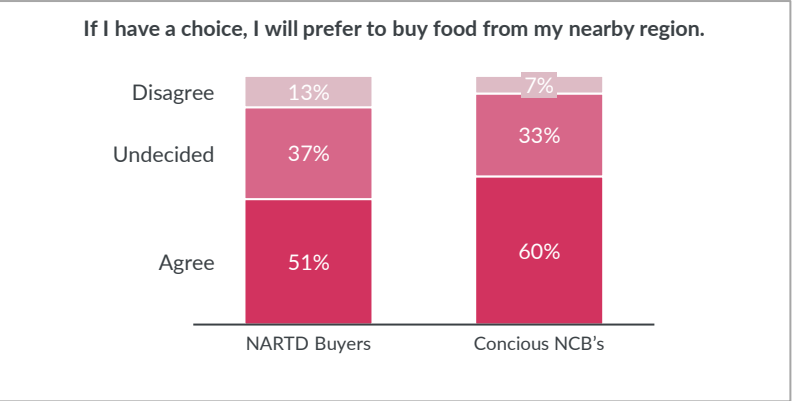
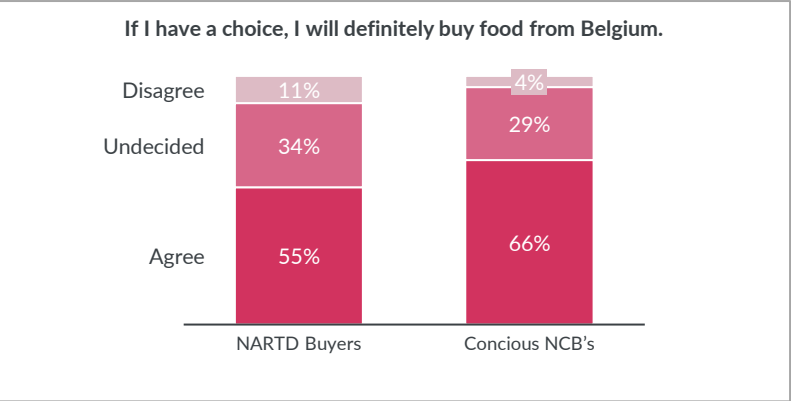
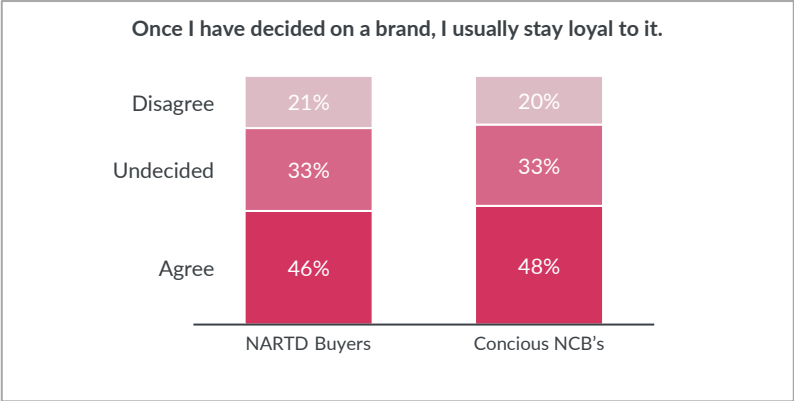


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



Purchase preferences

What do shoppers consider when they purchase?

5

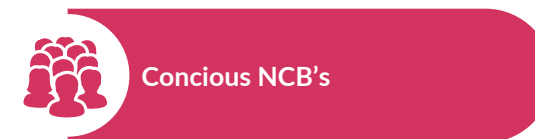


Purchase Preferences



Share of agreement
NARTD Buyers

Index Conscious NCB's vs. NARTD Buyers



- the target group likes natural, artificial free & healthy products that don't harm the environment.
- They also have a high preference for lactose & gluten free products.
- The group is not fond of light/zero or low fat products

Purchase preferences

What do shoppers consider when they purchase?

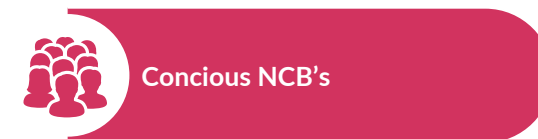
5



Purchase Preferences

Organic / bio products	9%	<div></div> 176
Products made from natural ingredients	37%	<div></div> 137
Products which are produced in an environmentally friendly manner	24%	<div></div> 131
Climate-neutral / carbon-neutral products	8%	<div></div> 124
Environmentally friendly packaging	37%	<div></div> 122
Products free from palm oil	22%	<div></div> 112
Products contributing to animal welfare	25%	<div></div> 111
Fairly produced and traded products	24%	<div></div> 108
Products without long transport	21%	<div></div> 98

Share of agreement NARTD Buyers Index Concious NCB's vs. NARTD Buyers



- The target group cares about all aspects here: organic, natural, environmentally friendly, sustainable, fair trade

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7



Important Features of Retailers

top and flop statements

Attractive organic assortment	22%	<div></div> 148
Offers a delivery service	12%	<div></div> 126
Social & environmental responsibility	53%	<div></div> 120
Availability of local/regional products	42%	<div></div> 116
Retailer helps me to make healthy choices	48%	<div></div> 113
Easy to find products on shelves	83%	<div></div> 95
Easy to reach by car, availability of parking lot	80%	<div></div> 93
Nice, pleasant atmosphere	62%	<div></div> 92
Wide range of well-known brands	46%	<div></div> 89
Offer of ready-to-go / ready-to-eat products and meals	17%	<div></div> 84

Share of agreement
NARTD Buyers

Index Conscious NCB's vs. NARTD Buyers



Conscious NCB's

- The target group prefers an organic, local & responsible assortment.
- They are not fond ready-to-eat products.

Important Features of Retailers

Criteria for choosing a retailer

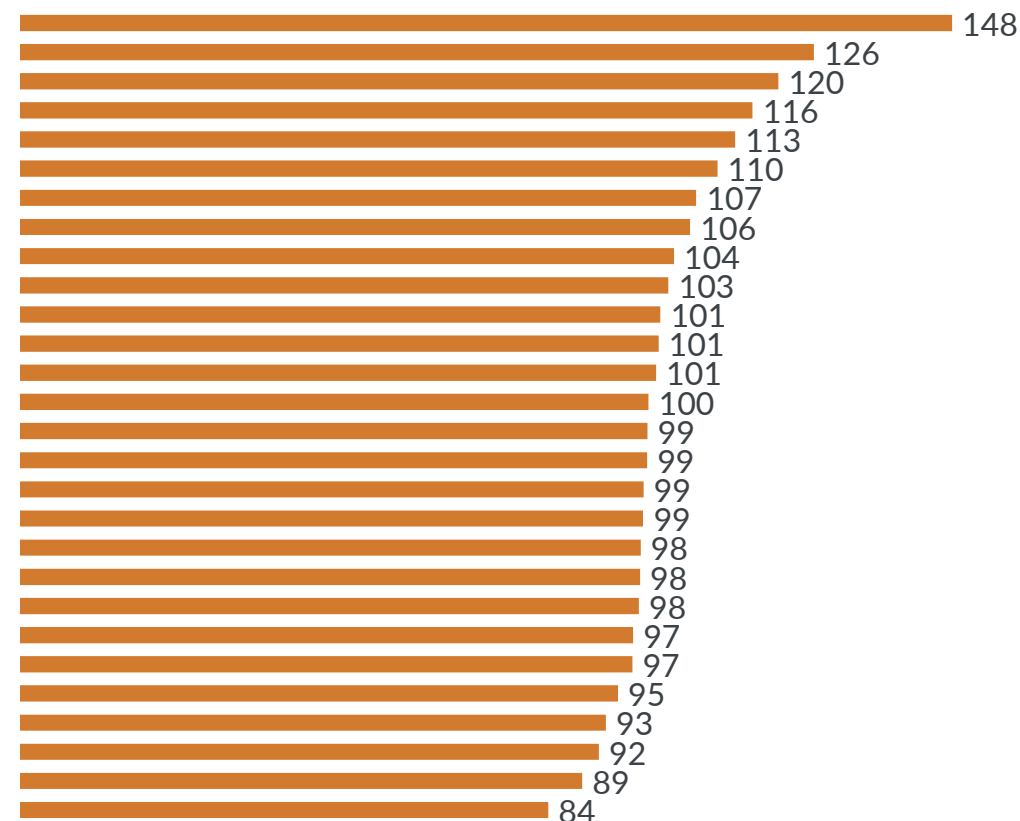
7



Important Features of Retailers



Attractive organic assortment	22%
Offers a delivery service	12%
Social & environmental responsibility	53%
Availability of local/regional products	42%
Retailer helps me to make healthy choices	48%
Retailer contributes to plastic reduction/ avoidance	66%
Close to home/ workplace	73%
Retailer tries to reduce food waste	69%
Overall fair prices	95%
Large variety in pack sizes to meet my needs	66%
Clean and tidy store	90%
High quality of products	76%
Convenient opening hours	77%
Constant availability of products, no out of stocks	91%
Good fresh department	92%
Attractive private labels	77%
Clear store layout / easy navigation	74%
Possibility for self-scanning / self-checkout	27%
Broad assortment, wide range of products	86%
Friendly, well-trained staff	88%
Attractive promotions	86%
Loyalty card / loyalty program	64%
Quick service / short waiting time at the checkout	70%
Easy to find products on shelves	83%
Easy to reach by car, availability of parking lot	80%
Nice, pleasant atmosphere	62%
Wide range of well-known brands	46%
Offer of ready-to-go / ready-to-eat products and meals	17%



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

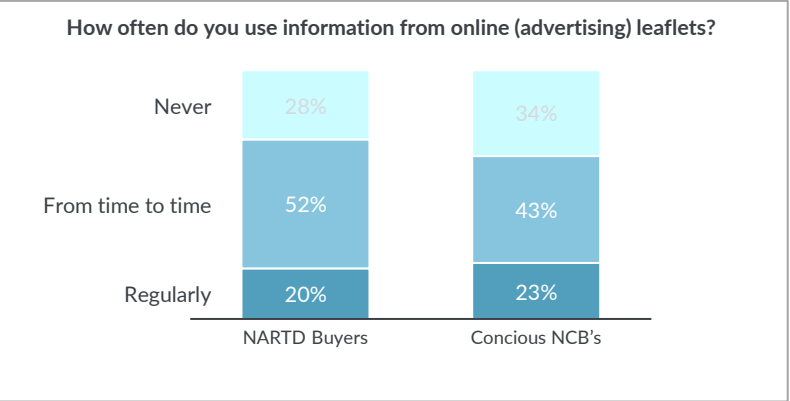
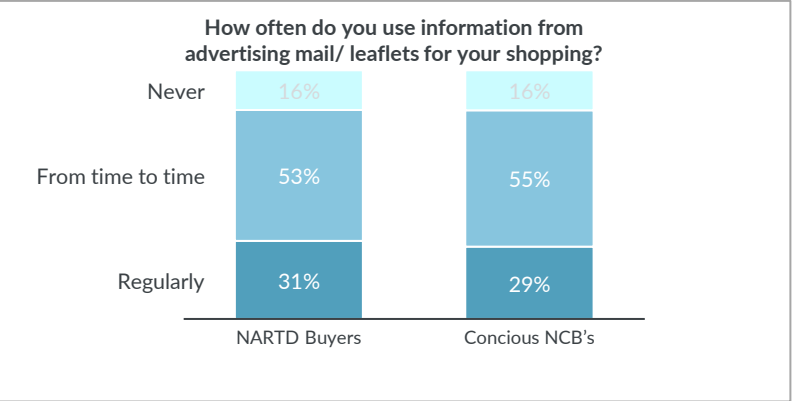
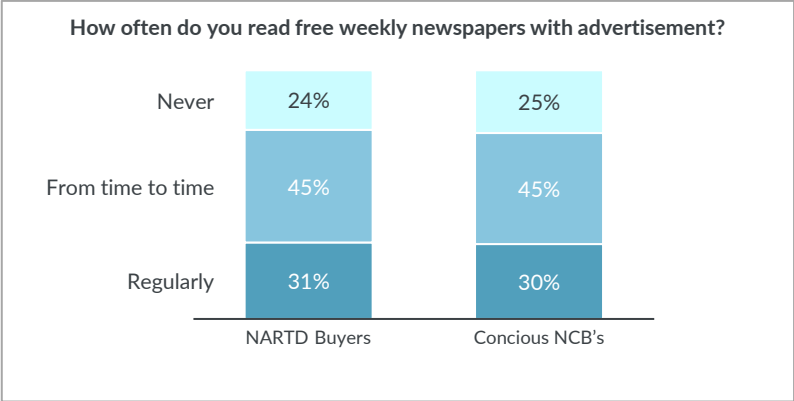
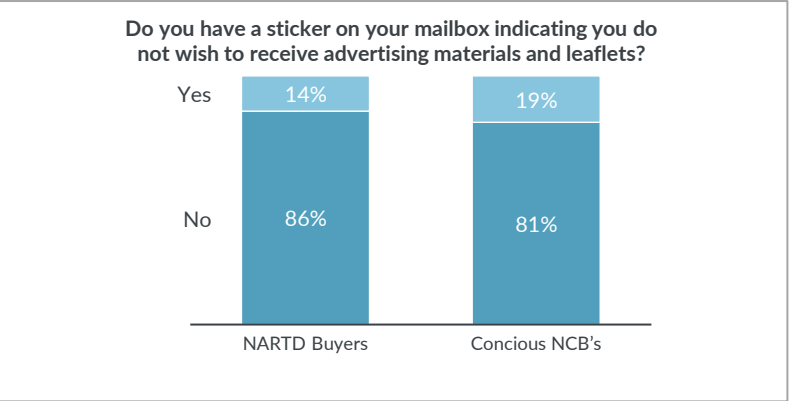
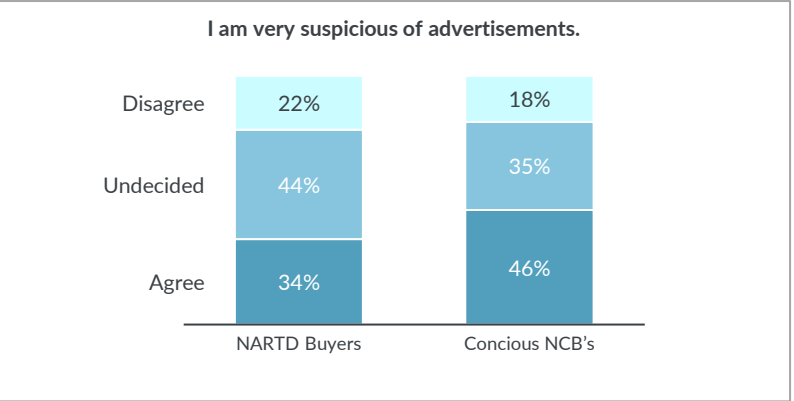
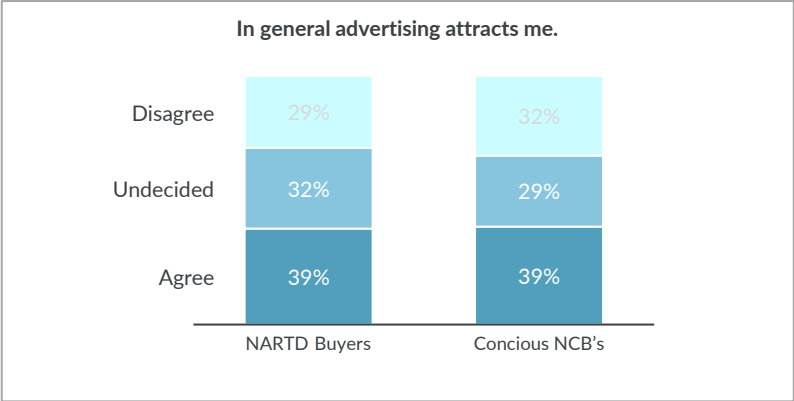


Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



Media behavior & Advertising usage



Media behavior & Advertising usage

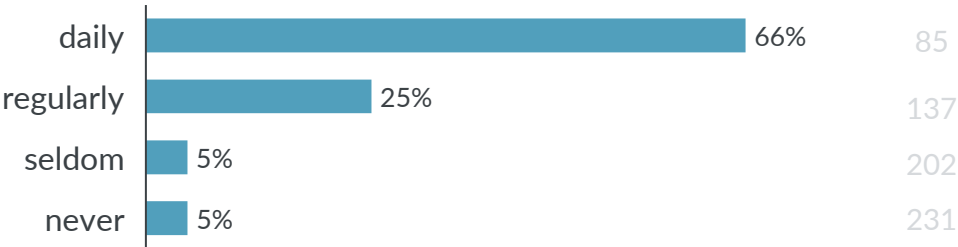
Attitudes and receptivity to media and advertising



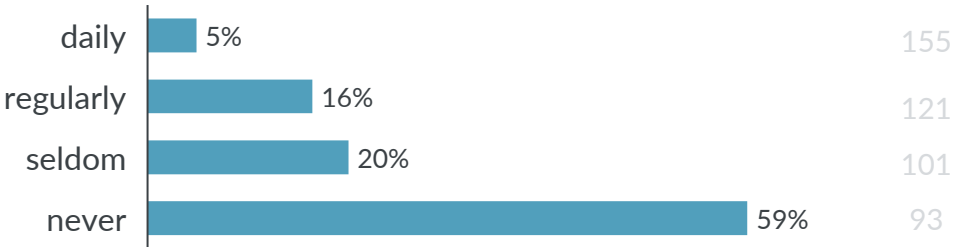
Media behavior & Advertising usage



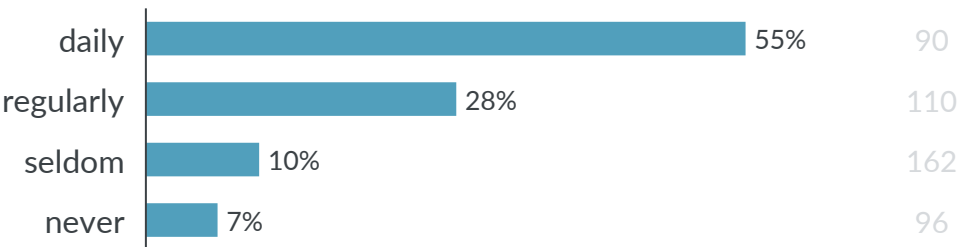
How often are you watching tv



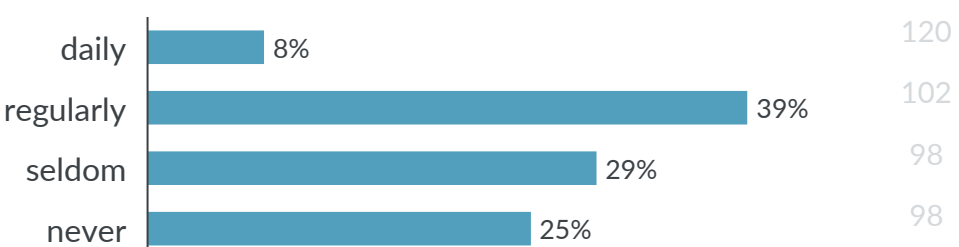
How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines



Media behavior & Advertising usage

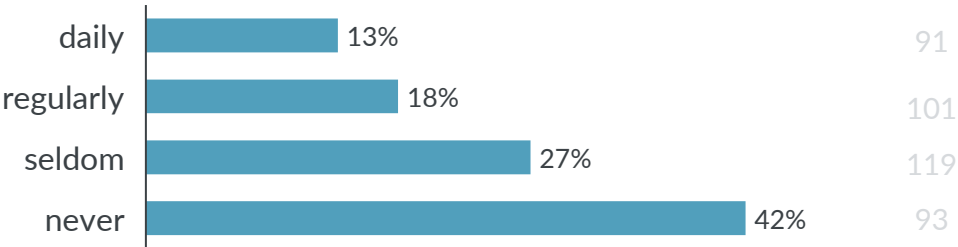
Attitudes and receptivity to media and advertising



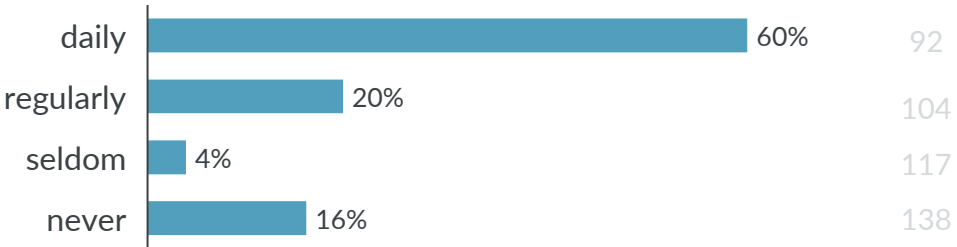
Media behavior & Advertising usage



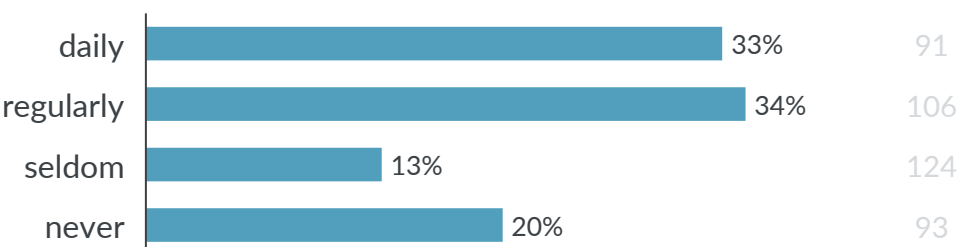
How often are you reading (printed) newspapers



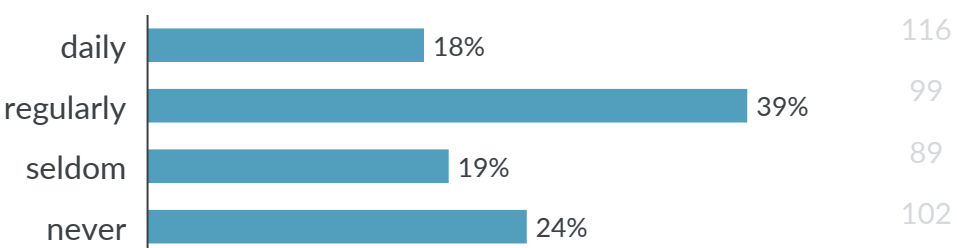
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising

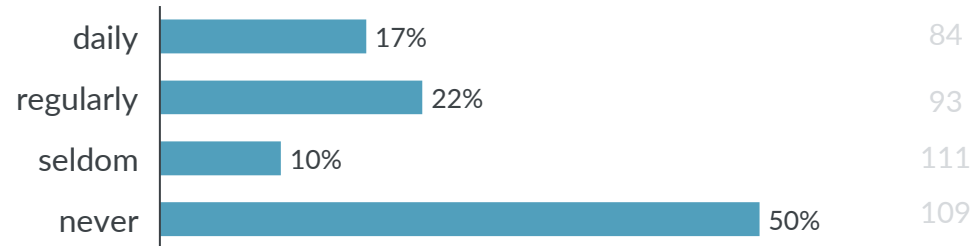
8



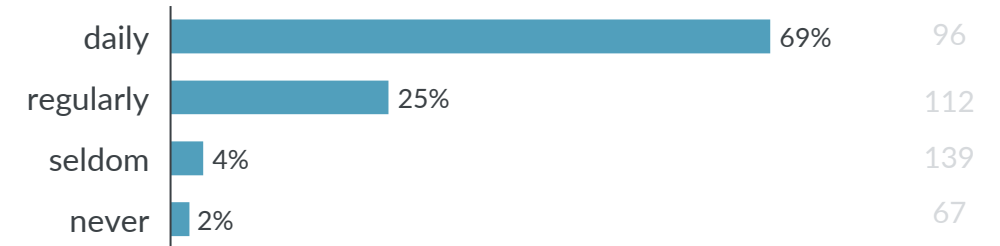
Media behavior & Advertising usage



How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



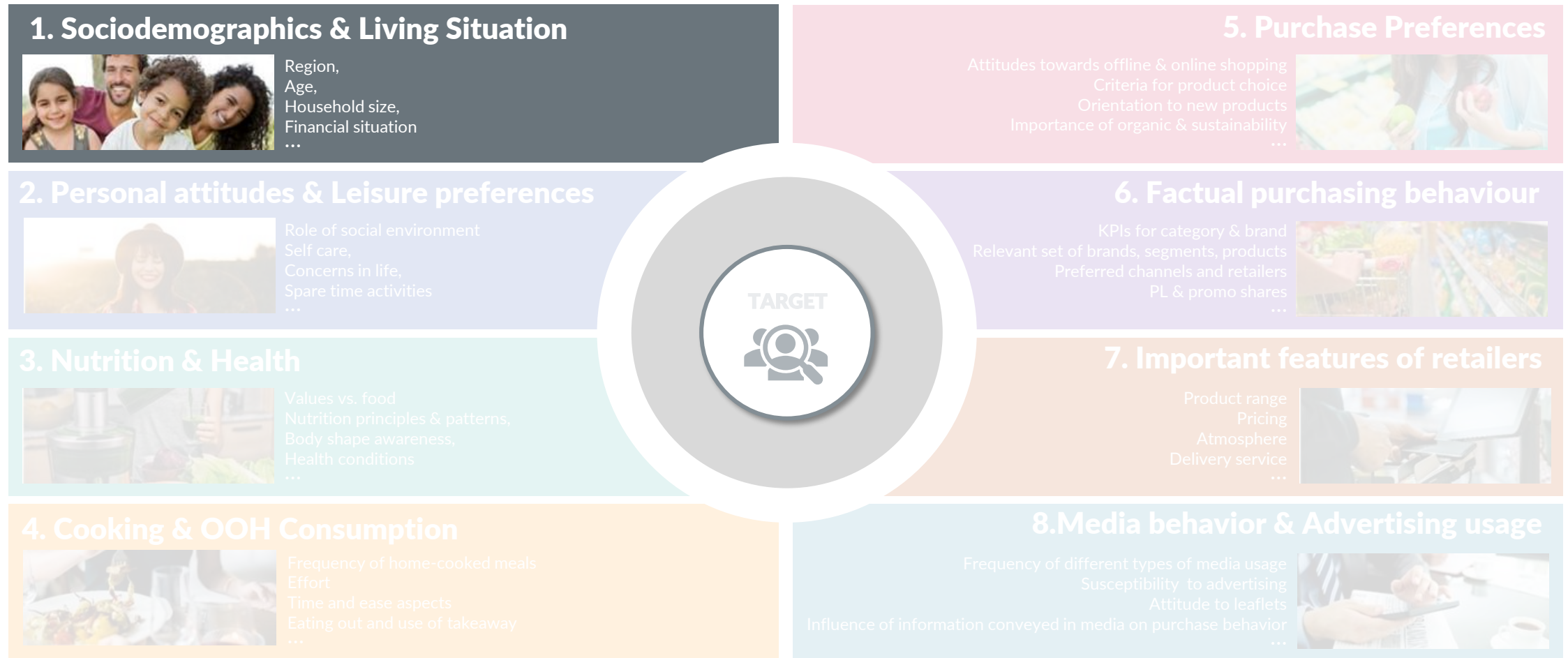
Surfing the internet (otherwise)



06

Intense, Emerging Families

Chapter 1: Sociodemographics & Living Situation



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis

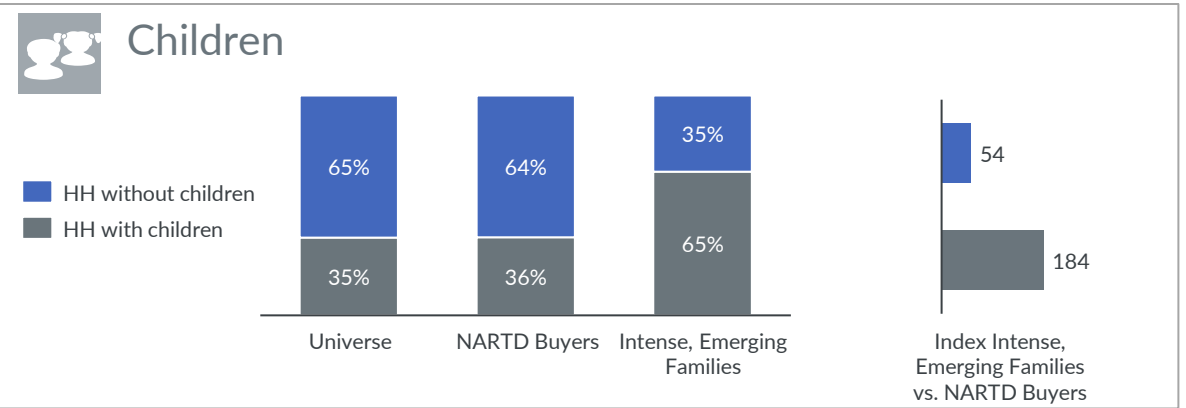
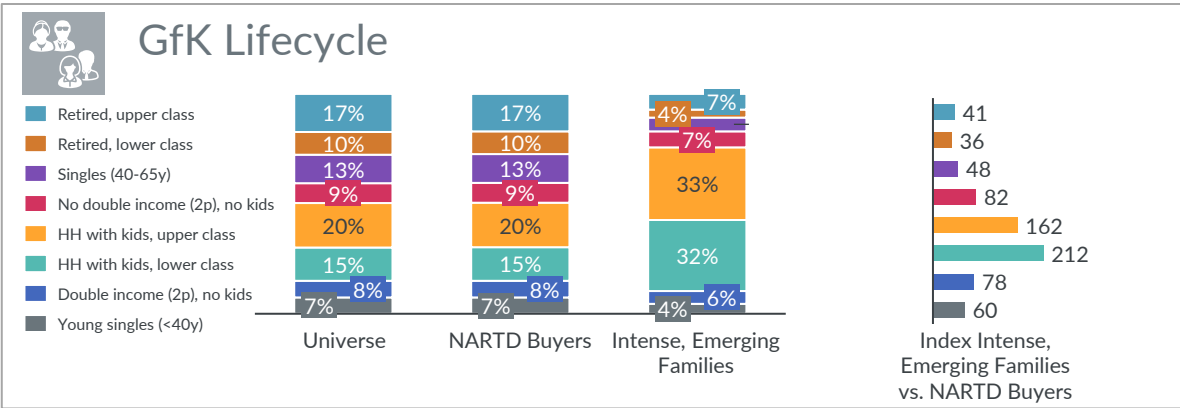
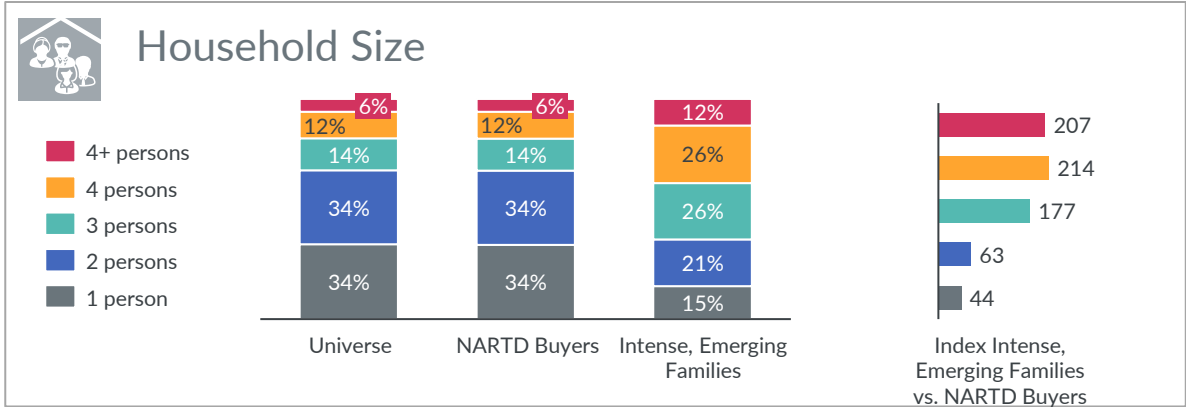
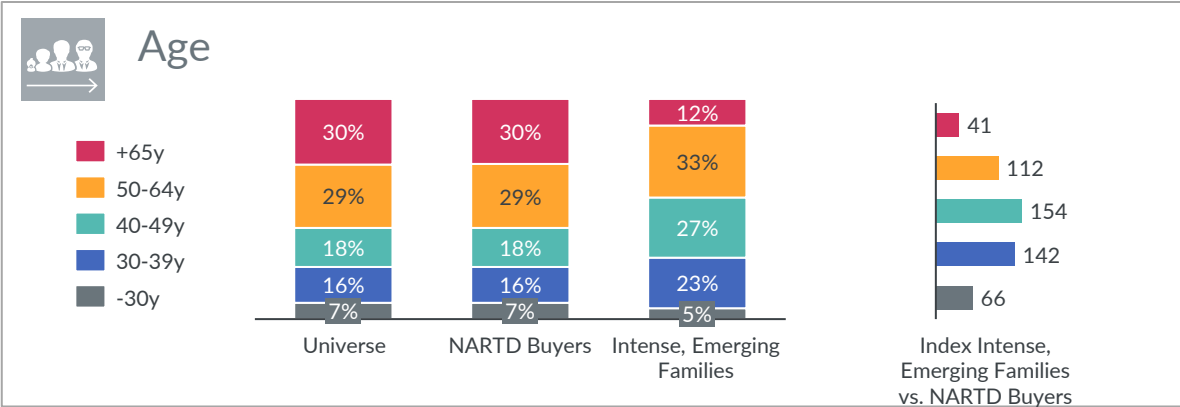


1



Sociodemographics & Living Situation

Intense, Emerging Families



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1

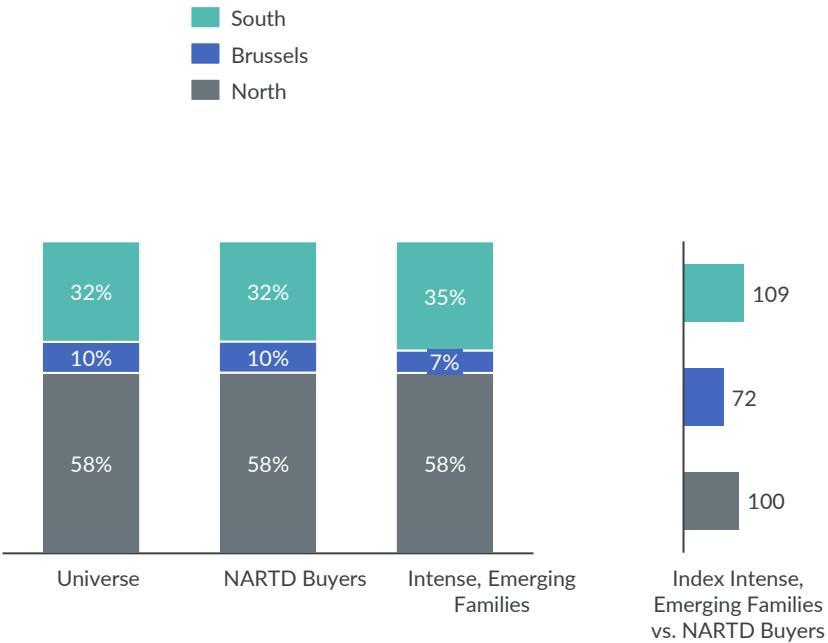


Sociodemographics & Region

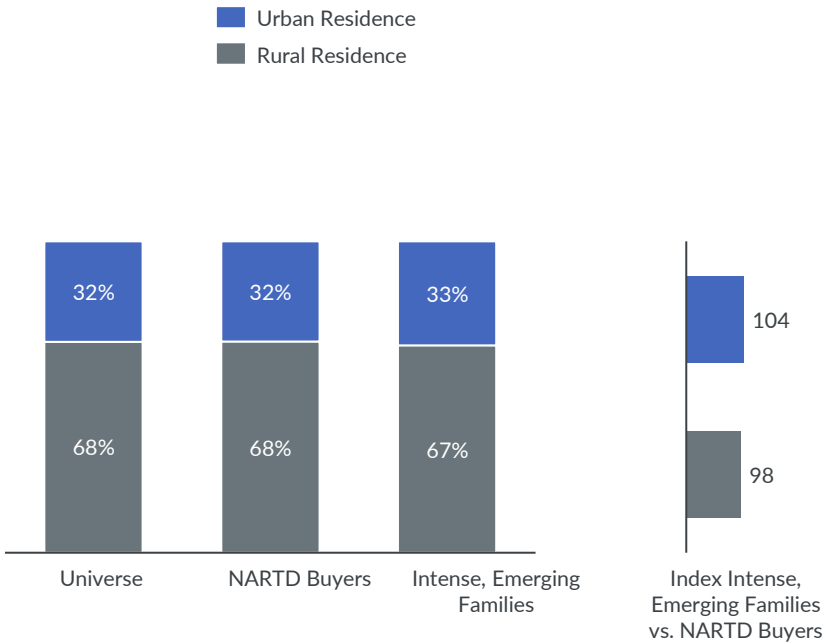
Intense, Emerging Families



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



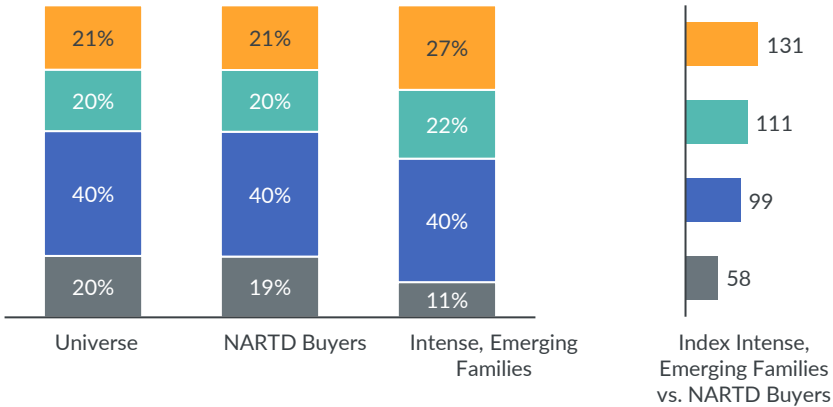
Sociodemographics & Financial Situation

Intense, Emerging Families



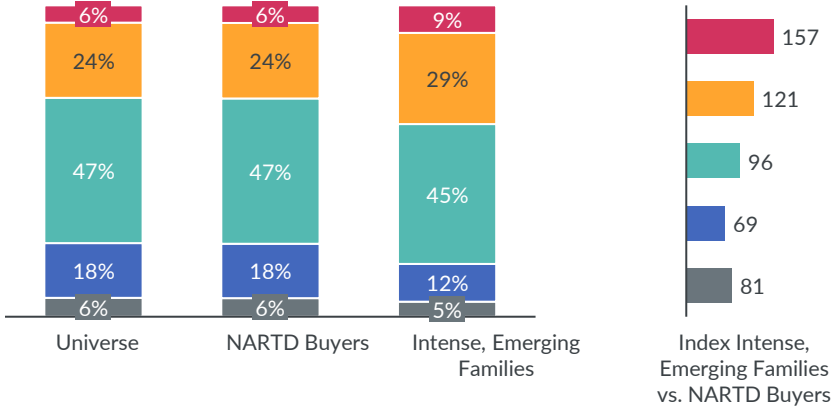
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



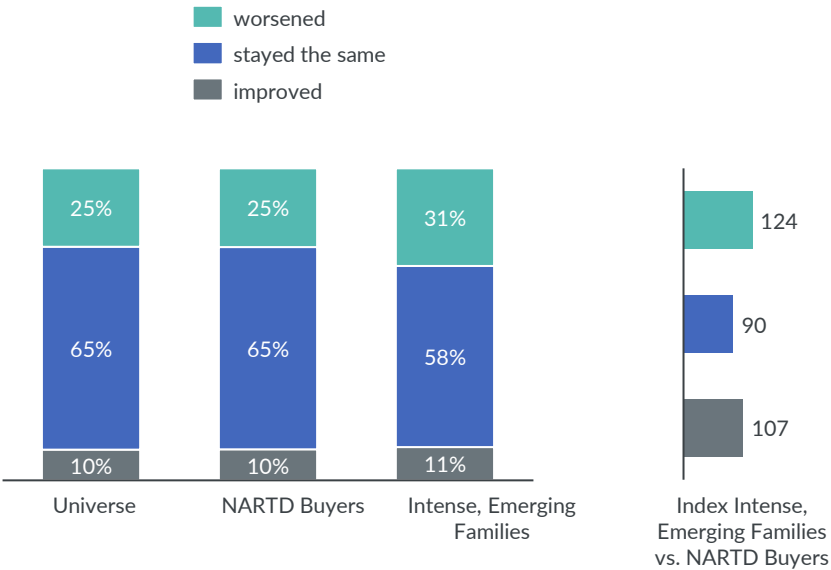
Sociodemographics & Financial Situation

Intense, Emerging Families



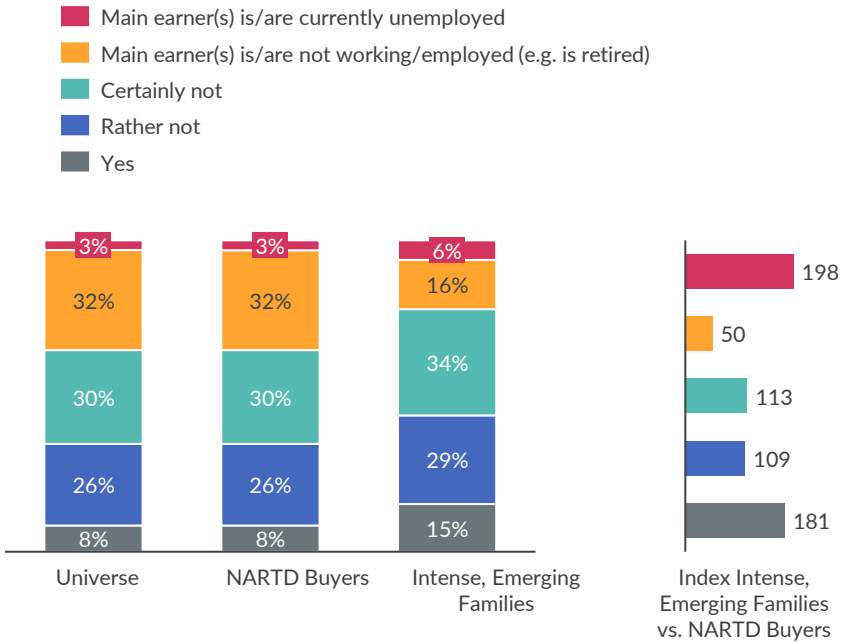
Future Financial Situation

Do you think that in 12 months your financial situation will have



Employment

Could the employment of the main earner(s) in your household be at risk?



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2













Personal attitudes & Leisure preferences

top and flop statements



Intense, Emerging Families

Going to sport events: games/ competitions	7%	 132
Going to the cinema	16%	 132
Shopping	25%	 127
Going to Spa/Sauna (wellness activities)	14%	 124
Visiting concerts	16%	 114
Meditating, praying, going to church	4%	 88
Visiting training / continuing education courses	8%	 82
Volunteering/ getting involved in activities of civil society organizations	14%	 80
Reading books	41%	 73
Doing sports	24%	 69

Share of agreement
NARTD Buyers

Index Intense, Emerging
Families vs. NARTD Buyers

- Leisure activities of the target group in focus are out of home oriented.
- Sporting, reading & learning are not favorable

Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

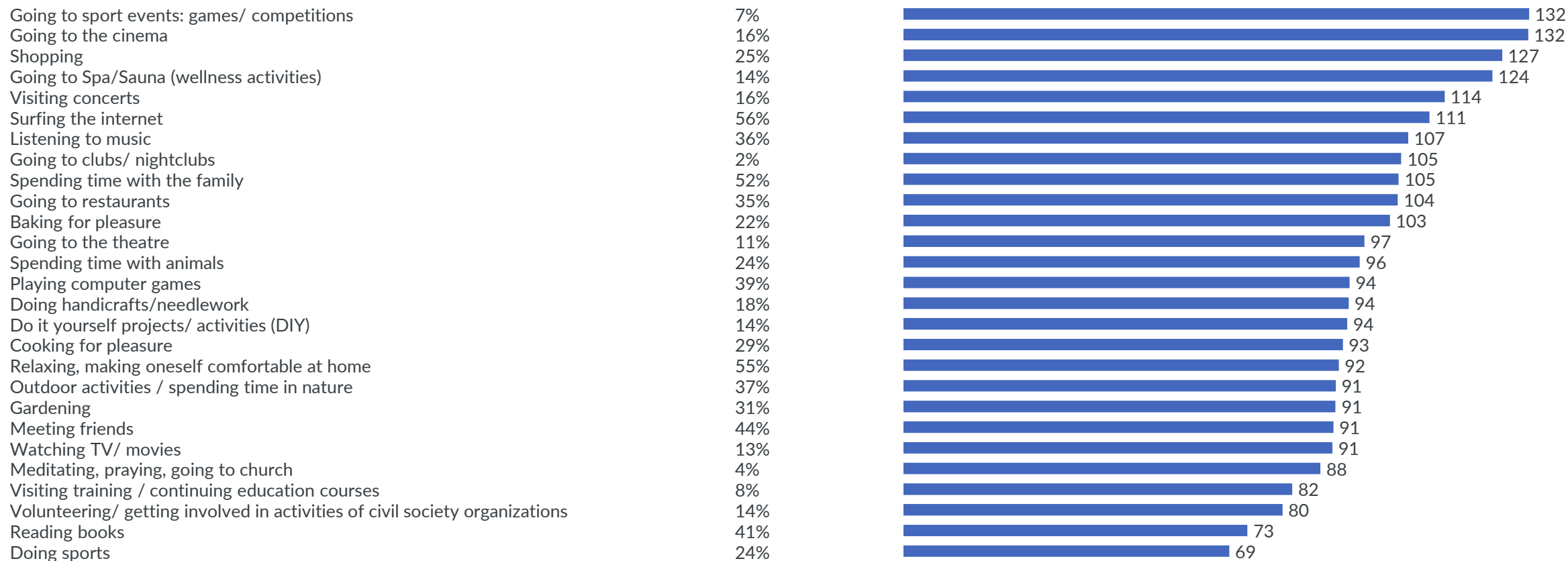
2



Personal attitudes & Leisure preferences



Intense, Emerging Families



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

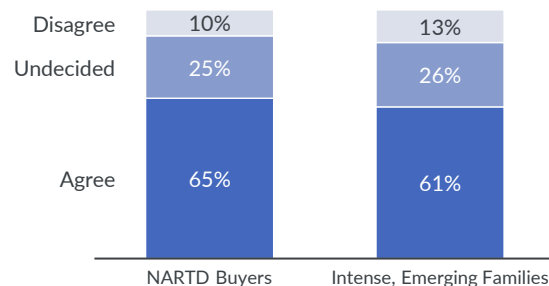


Personal attitudes & Leisure preferences

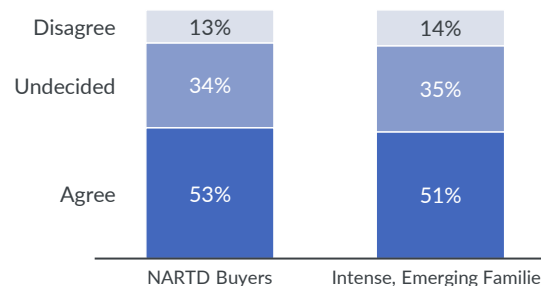


Intense, Emerging Families

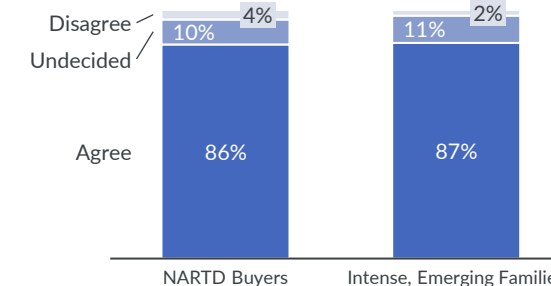
I like to be among people and enjoy socializing.



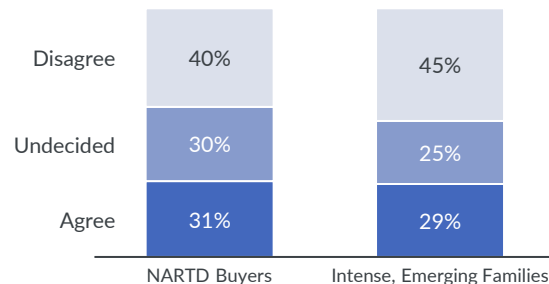
I do not like changes in my lifestyle.



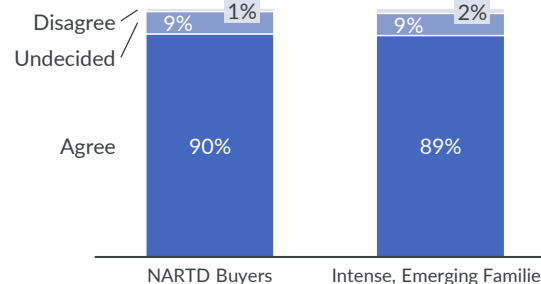
Family means a lot to me.



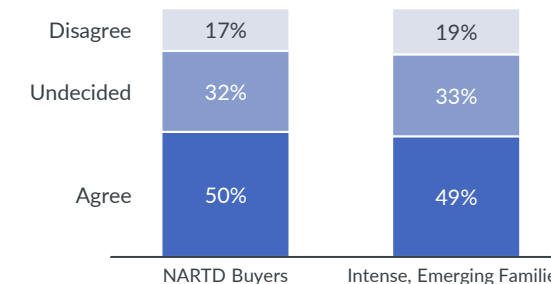
I do not worry about my future financial situation when I retire.



It is important to spoil yourself occasionally.



My appearance/ look is very important to me.

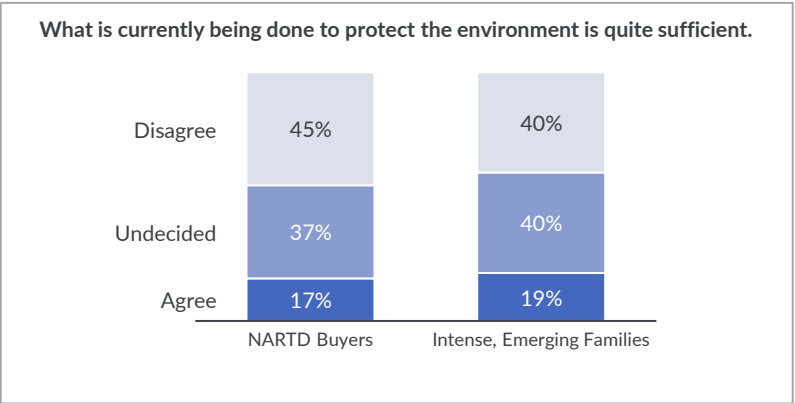
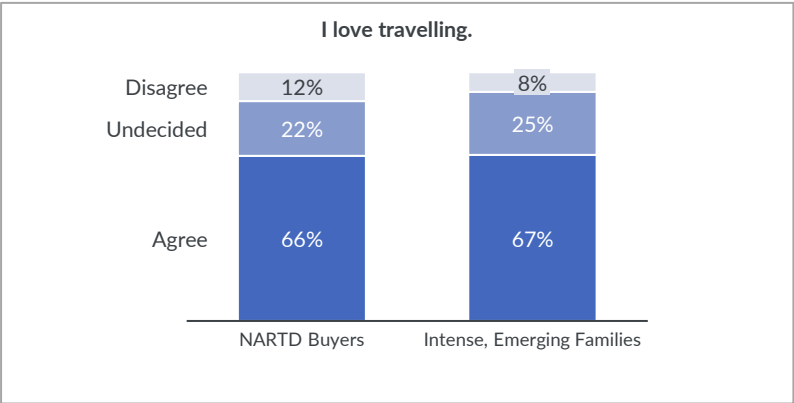
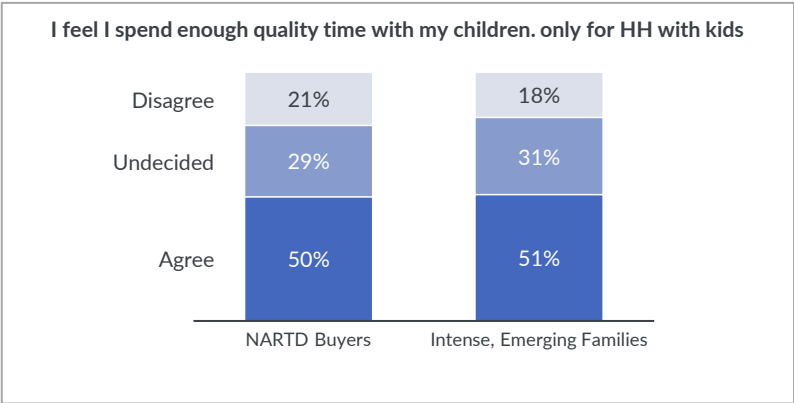
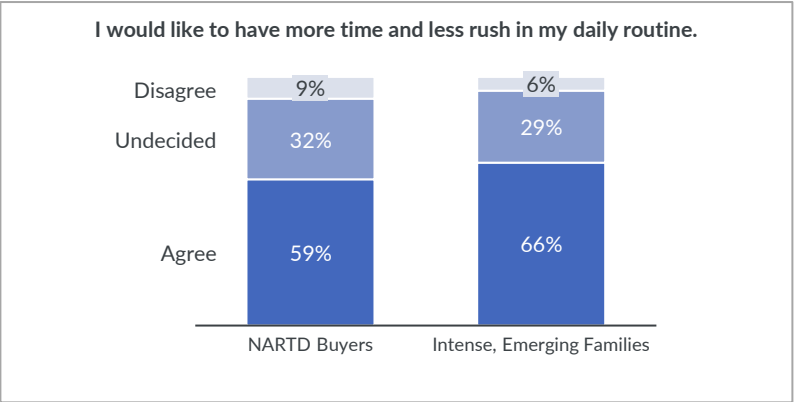
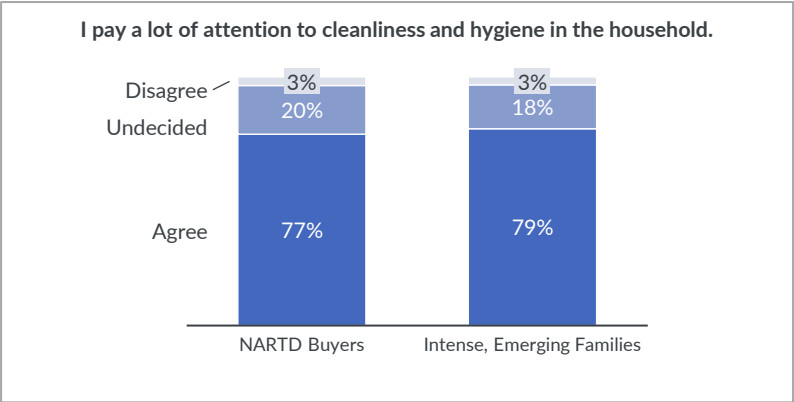
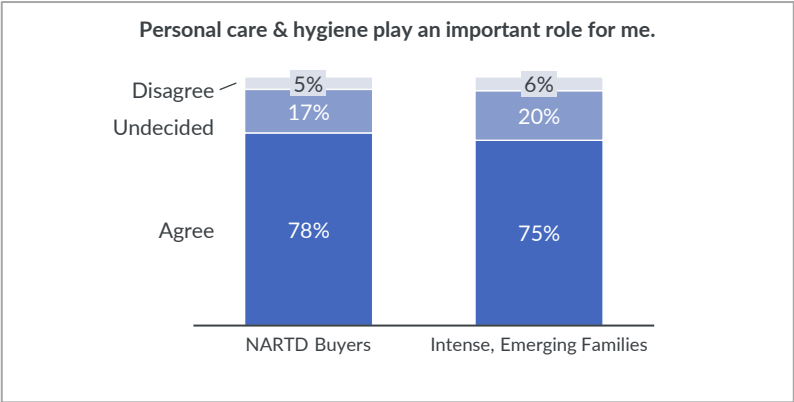
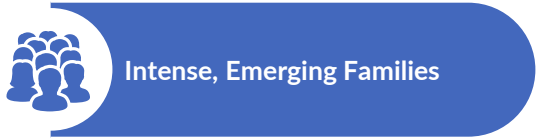


Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

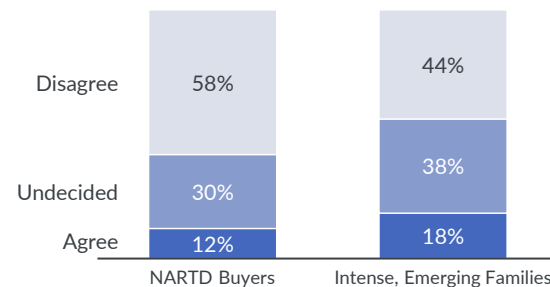


Personal attitudes & Leisure preferences



Intense, Emerging Families

I often have newly launched products faster than my friends.



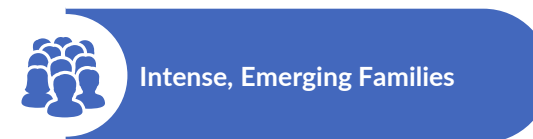
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



● NARTD Buyers

● Intense, Emerging Families

Enjoying life in the here and now					Thinking about tomorrow
Buying what you like					Buying what is necessary
Being careful					Daring something/ taking risk
Living an active exciting life					Living a quiet, secluded life
Shopping for groceries is fun					Shopping groceries is annoying
I like to buy things that nobody else has					I don't care if others have the same products
When shopping, I pay particular attention to price					When shopping, I pay particular attention to quality

I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 217
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 121
When eating and drinking I watch my figure.	46%	<div></div> 108
I like to spoil myself with good food.	83%	<div></div> 101
I do a lot for my health.	48%	<div></div> 91
I take care of my inner, mental health/balance.	54%	<div></div> 88
I consciously pay attention to a healthy diet.	59%	<div></div> 87
I exercise regularly to stay fit.	50%	<div></div> 84

Share of agreement
NARTD Buyers

Index Intense, Emerging
Families vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



Intense, Emerging Families

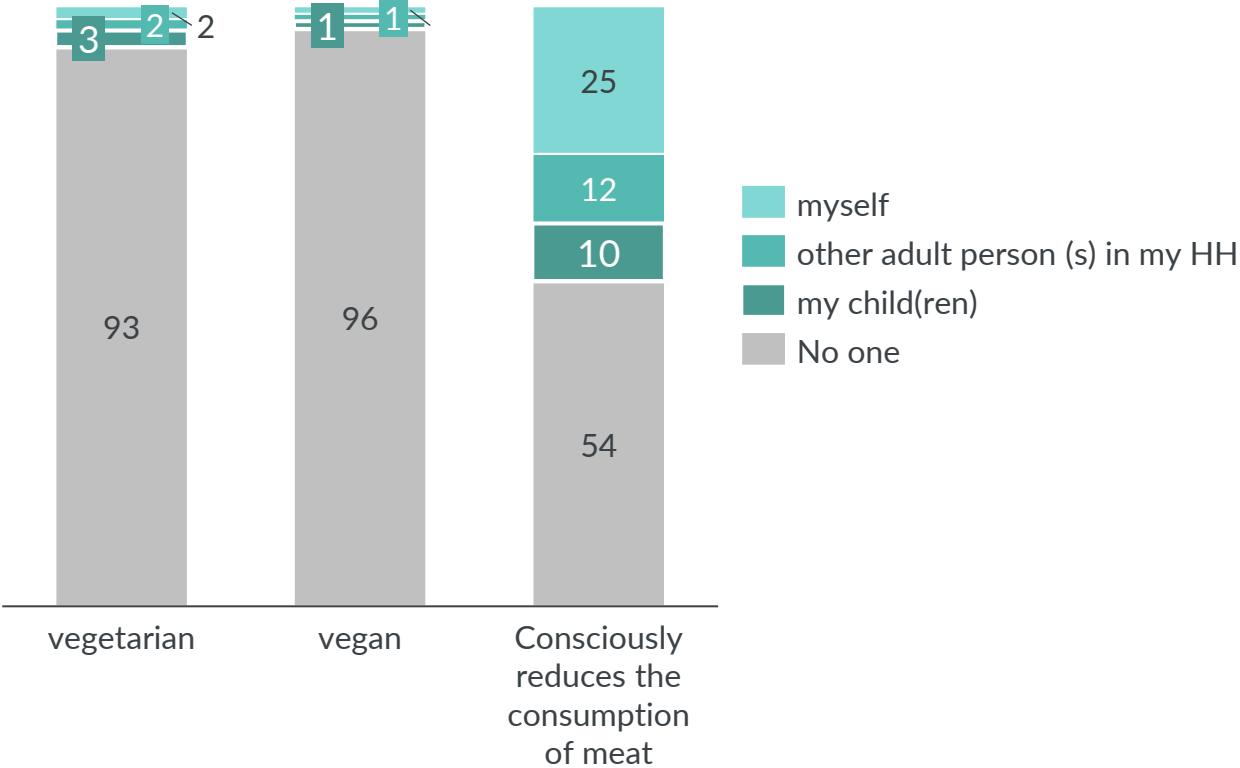
- The focus target group gives their children what they want to eat.
- Slimness orientation and figure awareness are "top of mind" in the target group.
- Less focus on health, both mental and physical.

3



Nutrition & Health

Share of different nutrition styles in the households



Intense, Emerging Families

▪ The focus target group pays attention to their meat consumption, but abstains from a purely plant-based diet

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

Coeliac disease (gluten intolerance)	2%	218
Skin problems	6%	145
Diabetes	10%	136
High cholesterol level	13%	100
No, relevant health conditions with impact on shopping behavior	60%	97
Other allergies or intolerances	9%	93
Others, not mentioned here	4%	91
Lactose intolerance	7%	84
I prefer not to answer	3%	84
High blood pressure	10%	84

Share of agreement
NARTD Buyers

Index Intense, Emerging
Families vs. NARTD Buyers



Intense, Emerging Families

- The focus target group is over indexing on gluten intolerance, diabetes and skin problems.

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption

4



Cooking & OOH Consumption



Intense, Emerging Families

I often order takeaway food, delivered at home or for pick up).	7%	121
I love to cook fancy/exceptional dishes and meals.	19%	115
I often eat quickly and 'on the go'.	10%	114
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	113
At home we cook hot meals every day/very often.	82%	106
The easier the cooking, the more I like it.	45%	105
I prefer to cook meals that do not take a lot of time to prepare.	46%	102
I often eat out (canteen, cafe, restaurant, etc.).	13%	101
I like to cook.	60%	96

Share of agreement
NARTD Buyers

Index Intense, Emerging
Families vs. NARTD Buyers

- the target group dislikes to cook at home.
- The use of takeaway food, convenience products and eating 'on the go' play an important role.

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

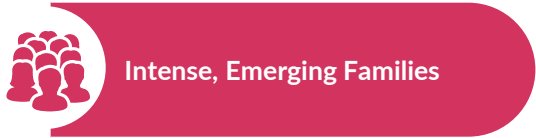


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

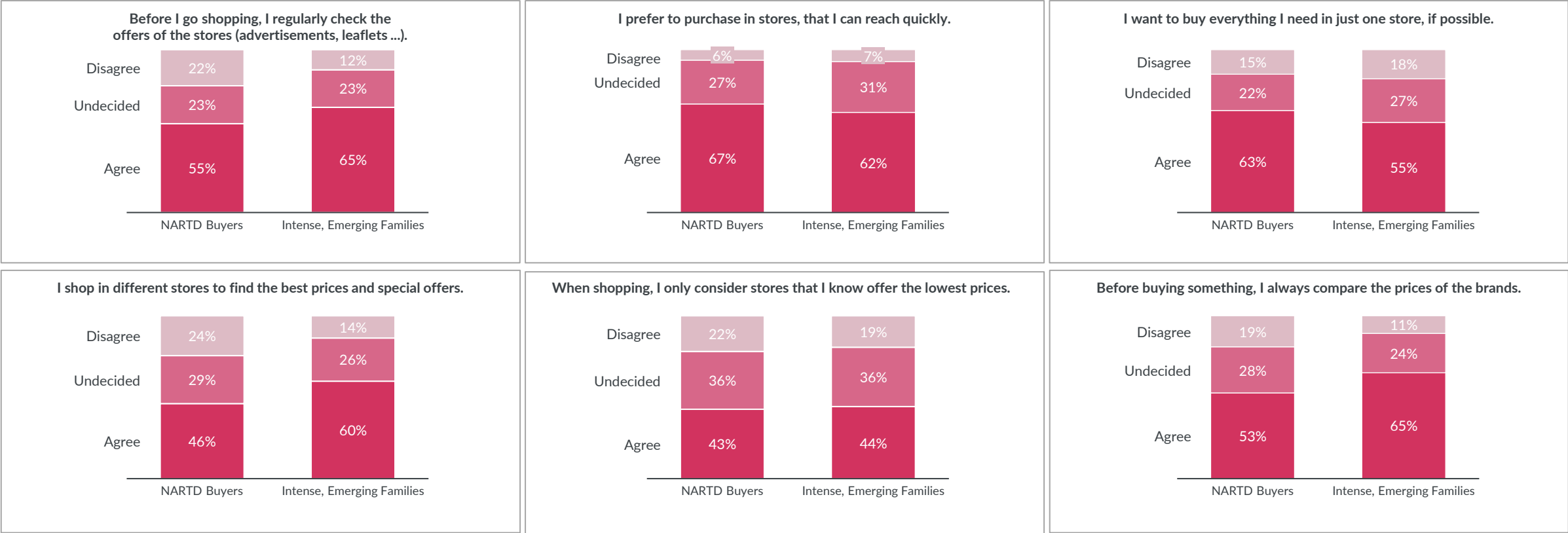
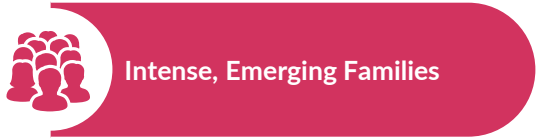


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

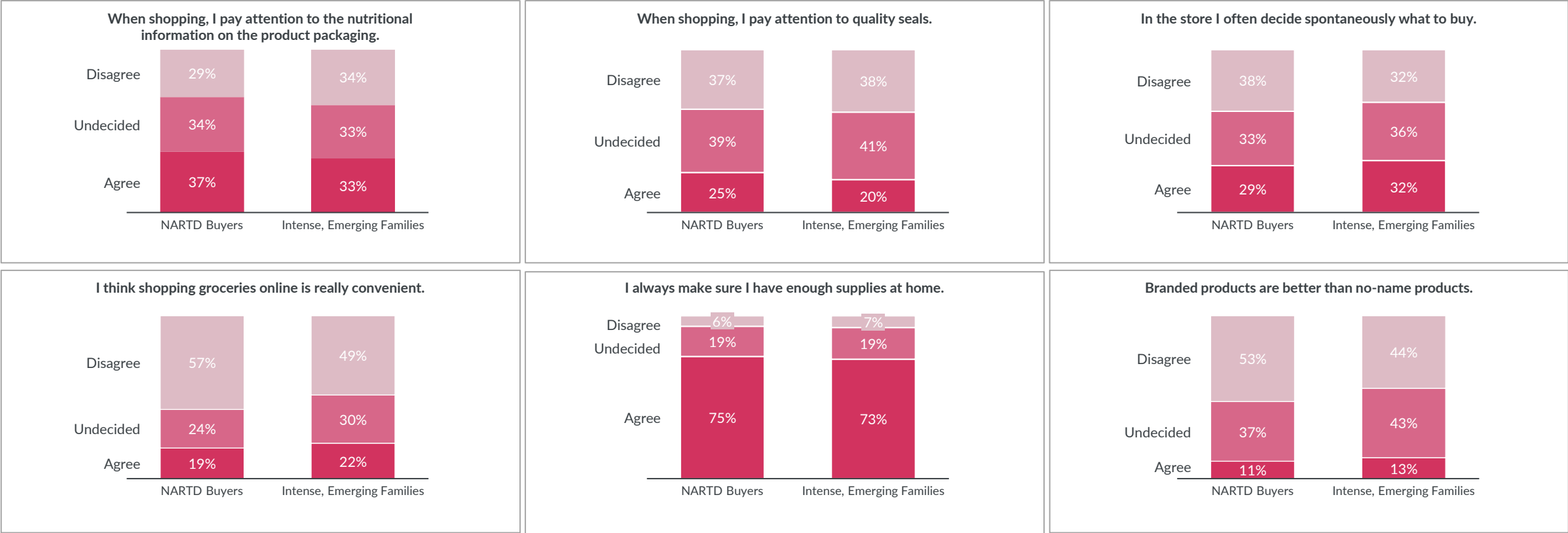
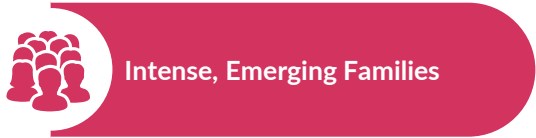


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

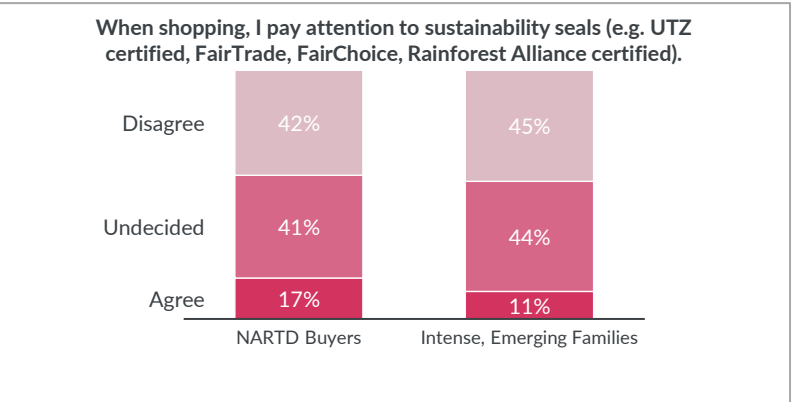
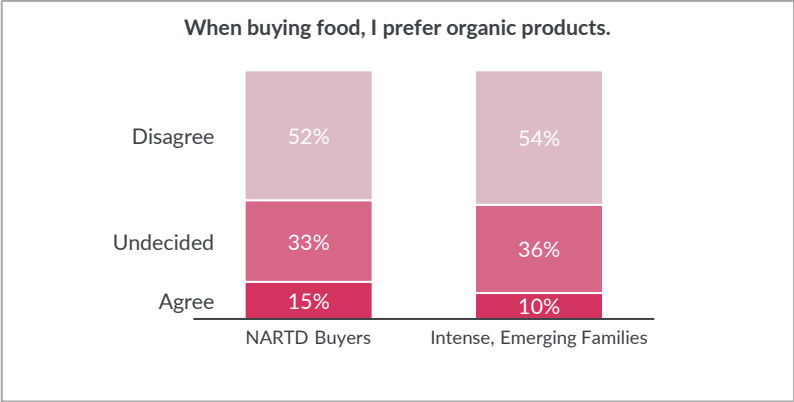
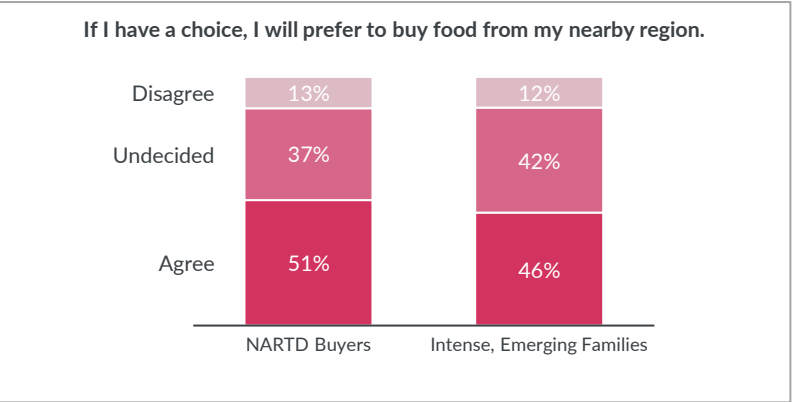
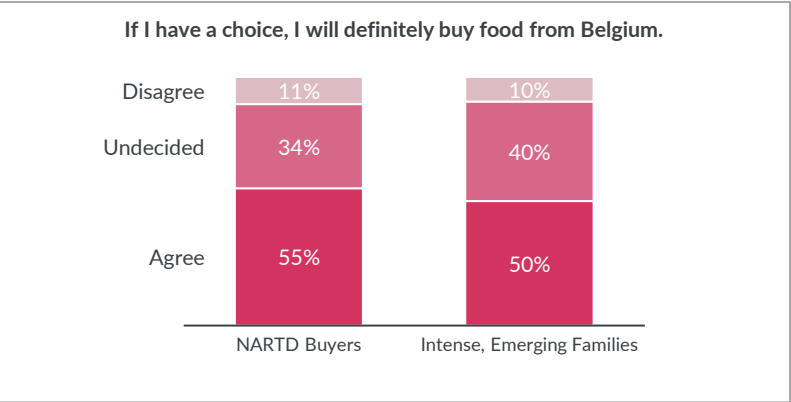
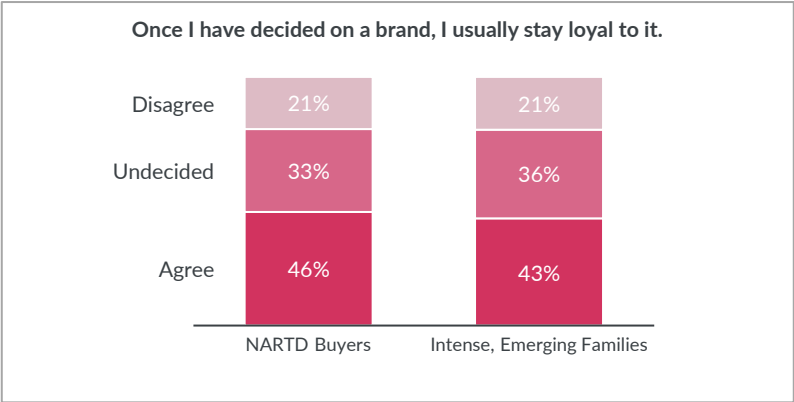
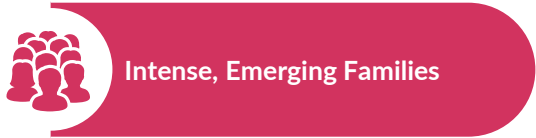


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



Purchase preferences

What do shoppers consider when they purchase?

5

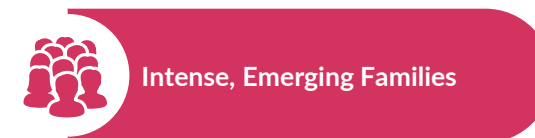


Purchase Preferences



Share of agreement
NARTD Buyers

Index Intense, Emerging
Families vs. NARTD Buyers



- the target group likes light/zero & low-fat products.
- They origin of the ingredients is of lesser importance to them. Same for climate friendliness.

Purchase preferences

What do shoppers consider when they purchase?

5

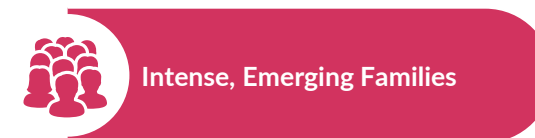


Purchase Preferences

Products contributing to animal welfare	25%	98
Products free from palm oil	22%	96
Climate-neutral / carbon-neutral products	8%	89
Fairly produced and traded products	24%	89
Products made from natural ingredients	37%	88
Products without long transport	21%	82
Products which are produced in an environmentally friendly manner	24%	82
Environmentally friendly packaging	37%	74
Organic / bio products	9%	54

Share of agreement
NARTD Buyers

Index Intense, Emerging
Families vs. NARTD Buyers



- The target group cares less about all these topics than the average NARTD Buyer.

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7

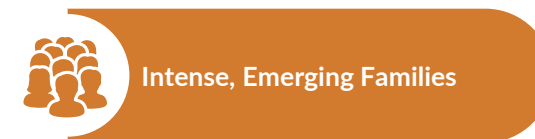


Important Features of Retailers

top and flop statements

Offer of ready-to-go / ready-to-eat products and meals	17%	126
Wide range of well-known brands	46%	122
Possibility for self-scanning / self-checkout	27%	119
Offers a delivery service	12%	117
Loyalty card / loyalty program	64%	111
Large variety in pack sizes to meet my needs	66%	89
Retailer tries to reduce food waste	69%	89
Retailer contributes to plastic reduction/ avoidance	66%	86
Social & environmental responsibility	53%	83
Attractive organic assortment	22%	68

Share of agreement Index Intense, Emerging Families vs. NARTD Buyers
NARTD Buyers



- The Target group prefers a branded assortment with loyalty card program & convenience services.
- They do not really care about the sustainability or climate impact of the assortment.

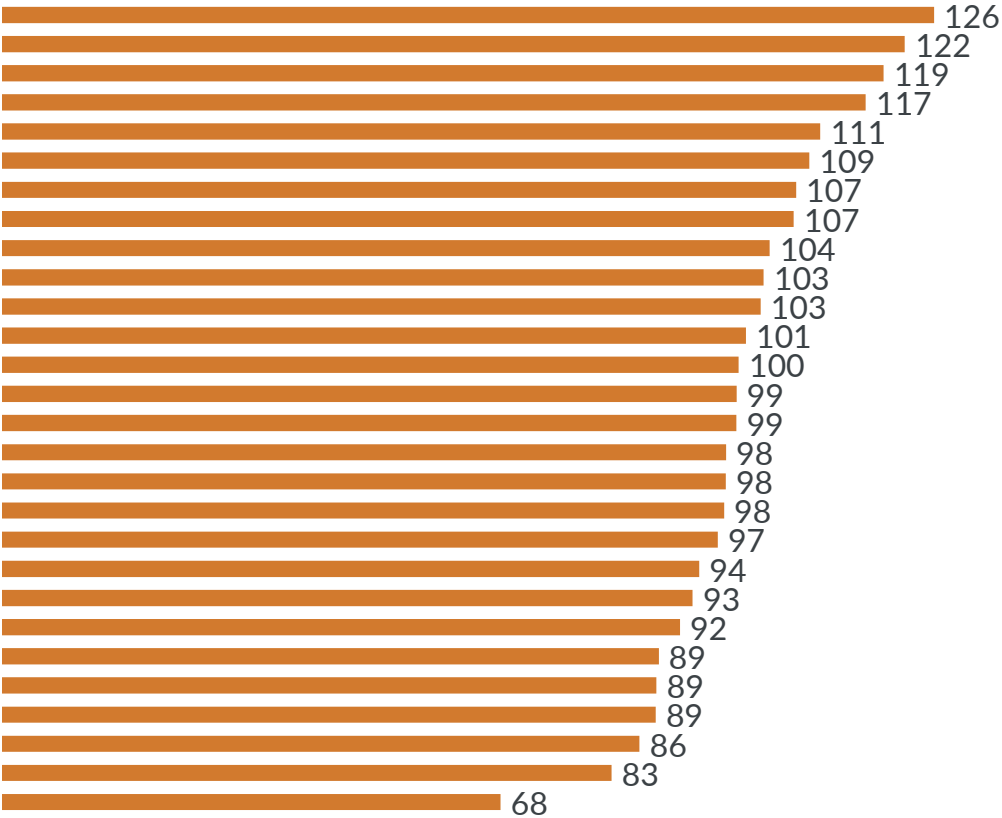
Important Features of Retailers

Criteria for choosing a retailer



Important Features of Retailers

Offer of ready-to-go / ready-to-eat products and meals	17%
Wide range of well-known brands	46%
Possibility for self-scanning / self-checkout	27%
Offers a delivery service	12%
Loyalty card / loyalty program	64%
Quick service / short waiting time at the checkout	70%
Easy to reach by car, availability of parking lot	80%
Attractive promotions	86%
Convenient opening hours	77%
Broad assortment, wide range of products	86%
Friendly, well-trained staff	88%
Constant availability of products, no out of stocks	91%
Easy to find products on shelves	83%
Nice, pleasant atmosphere	62%
Overall fair prices	95%
High quality of products	76%
Attractive private labels	77%
Good fresh department	92%
Clean and tidy store	90%
Clear store layout / easy navigation	74%
Availability of local/regional products	42%
Close to home/ workplace	73%
Retailer helps me to make healthy choices	48%
Large variety in pack sizes to meet my needs	66%
Retailer tries to reduce food waste	69%
Retailer contributes to plastic reduction/ avoidance	66%
Social & environmental responsibility	53%
Attractive organic assortment	22%



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



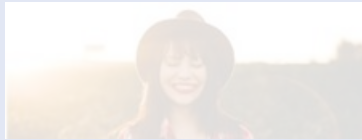
Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

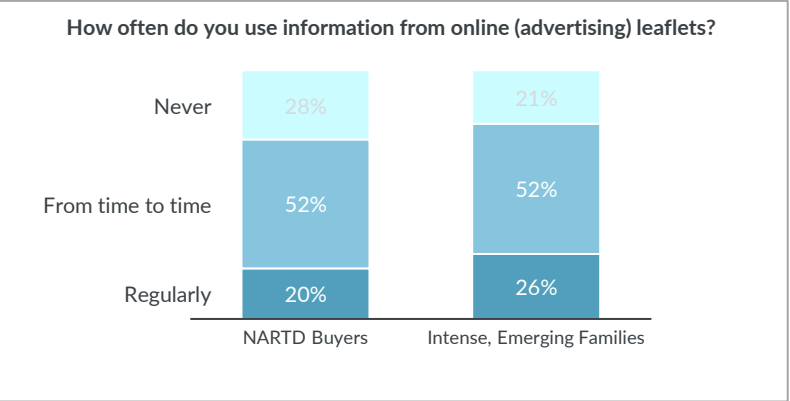
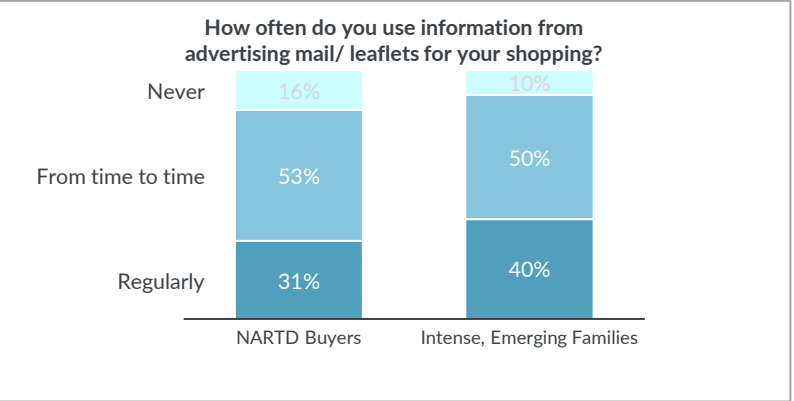
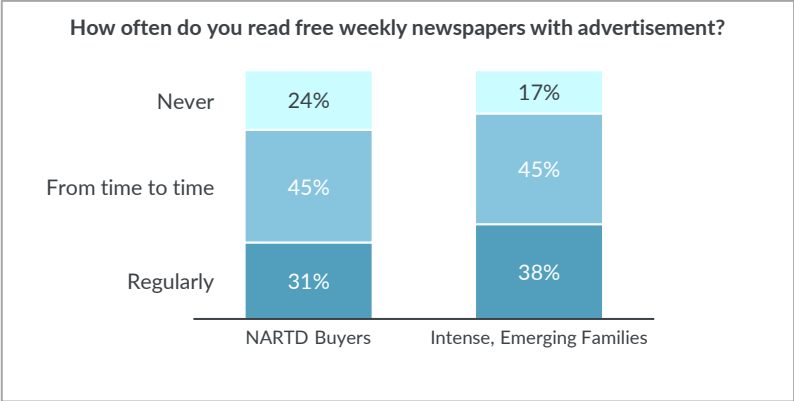
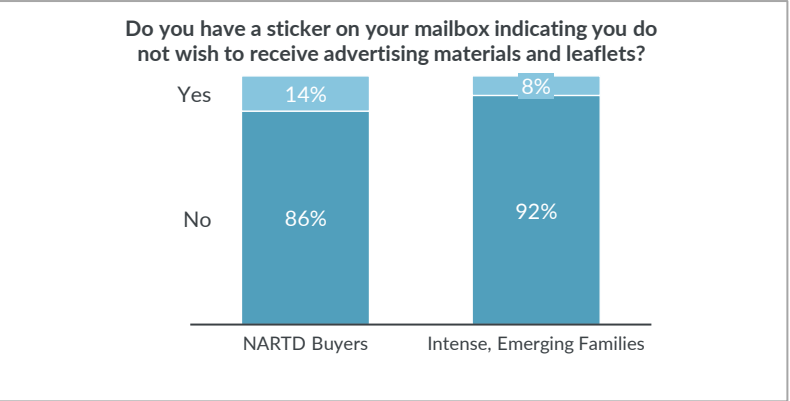
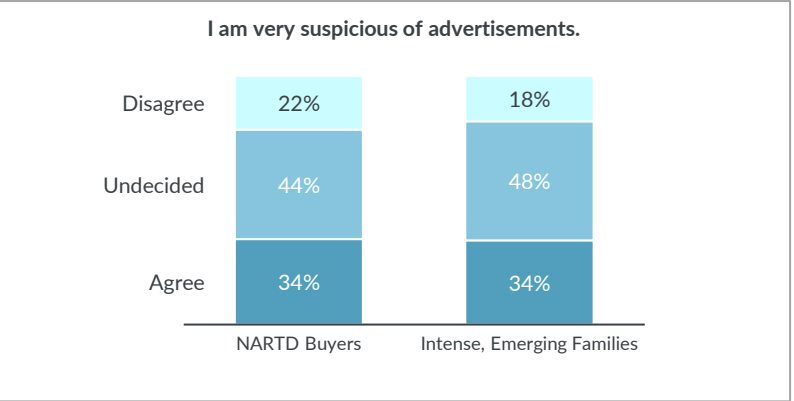
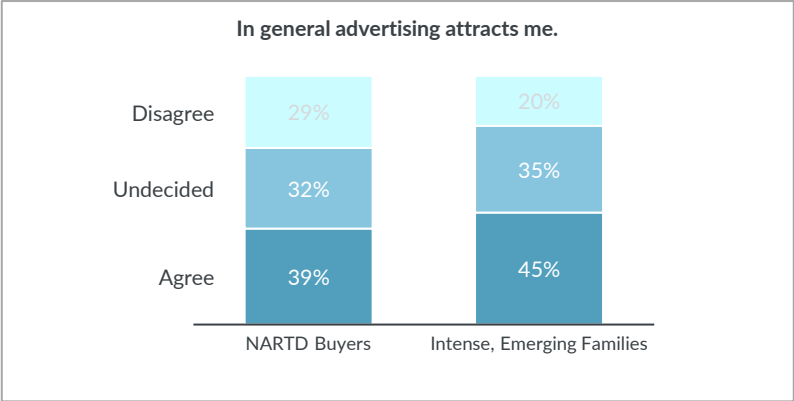
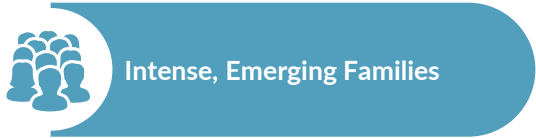


Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



Media behavior & Advertising usage

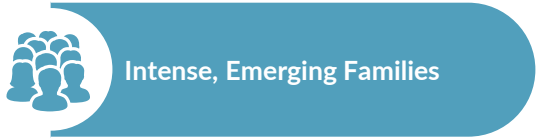


Media behavior & Advertising usage

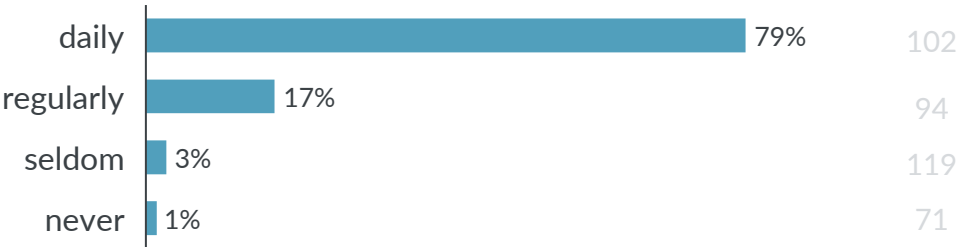
Attitudes and receptivity to media and advertising



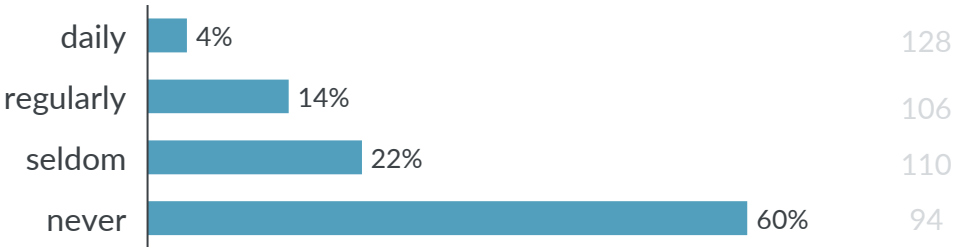
Media behavior & Advertising usage



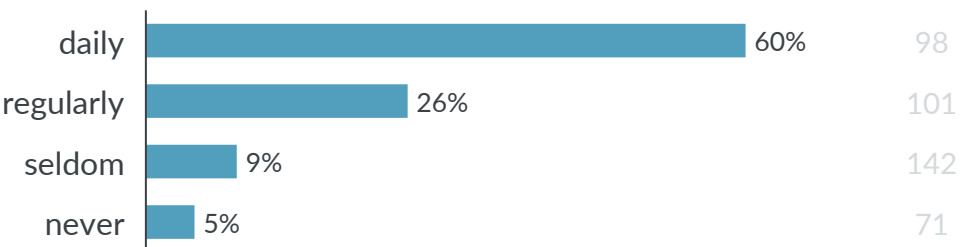
How often are you watching tv



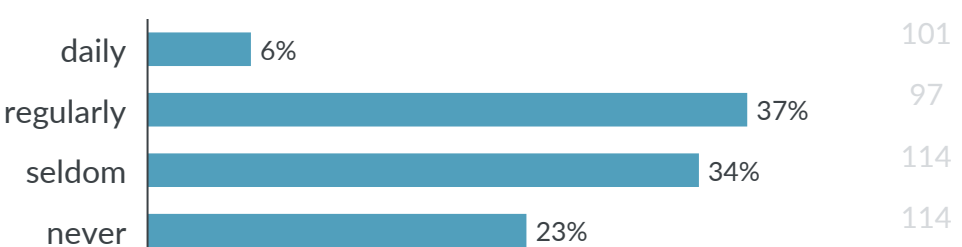
How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



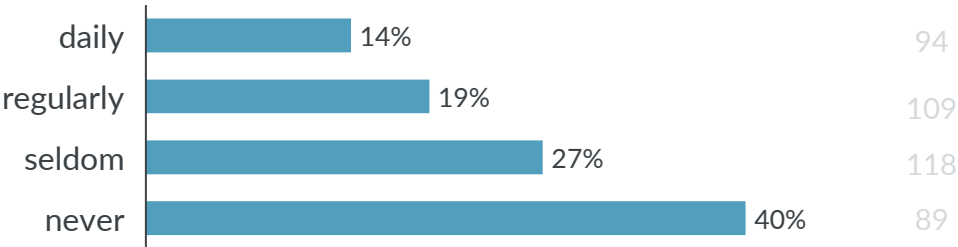
8



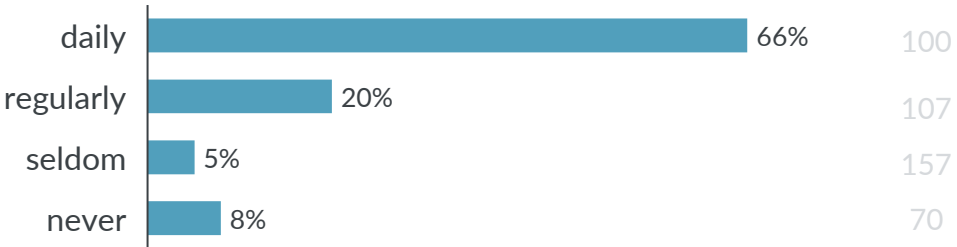
Media behavior & Advertising usage

Intense, Emerging Families

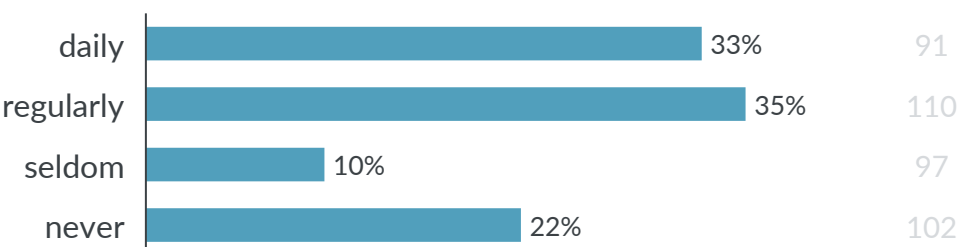
How often are you reading (printed) newspapers



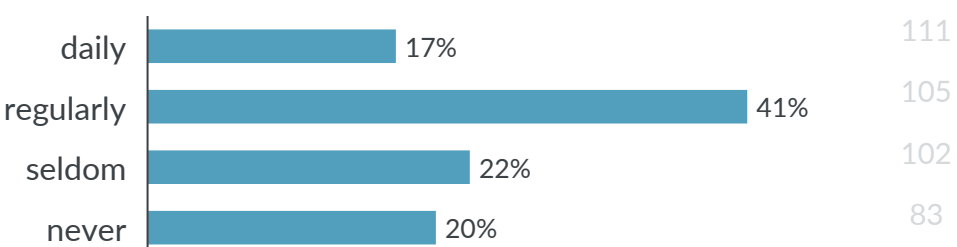
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)

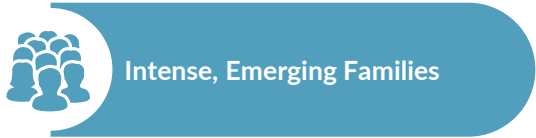


Media behavior & Advertising usage

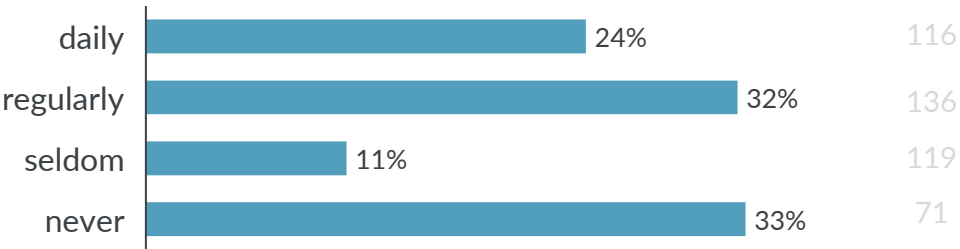
Attitudes and receptivity to media and advertising



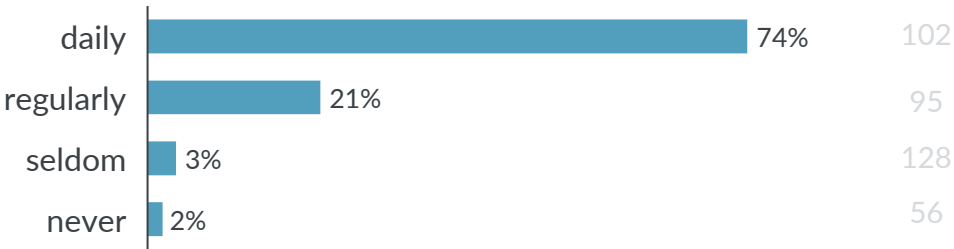
Media behavior & Advertising usage



How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



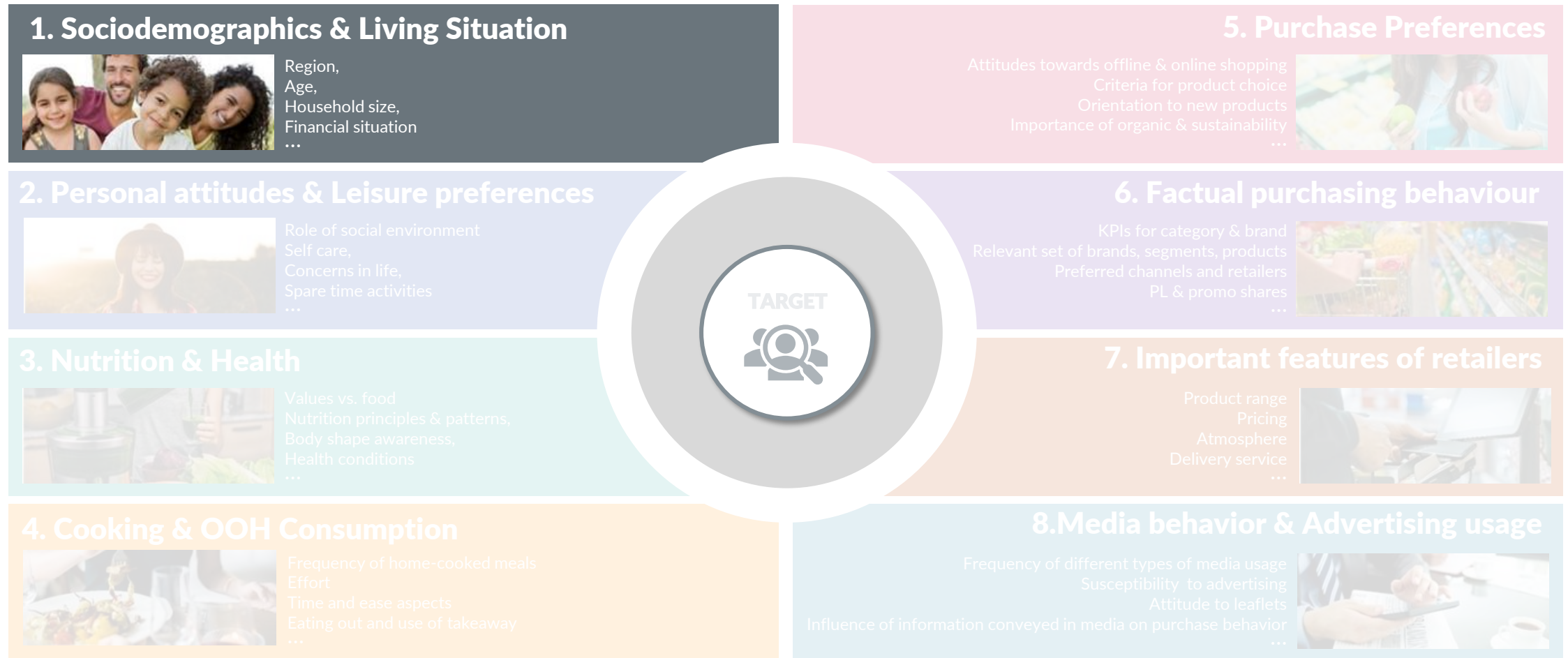
Surfing the internet (otherwise)



07

Single, High Routine Shoppers

Chapter 1: Sociodemographics & Living Situation



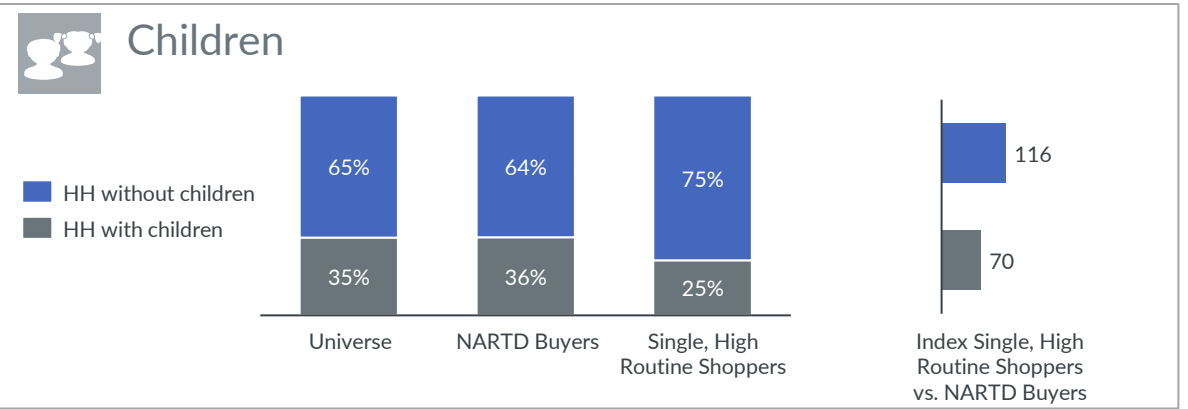
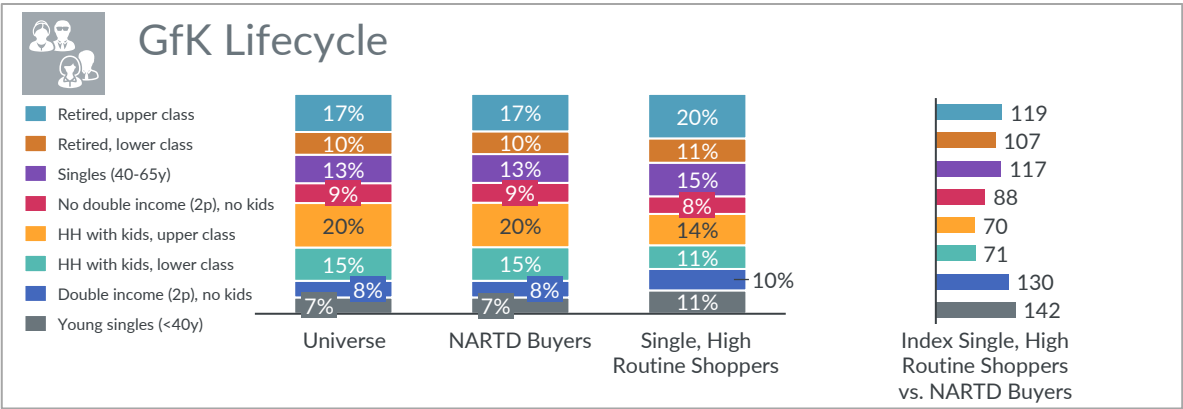
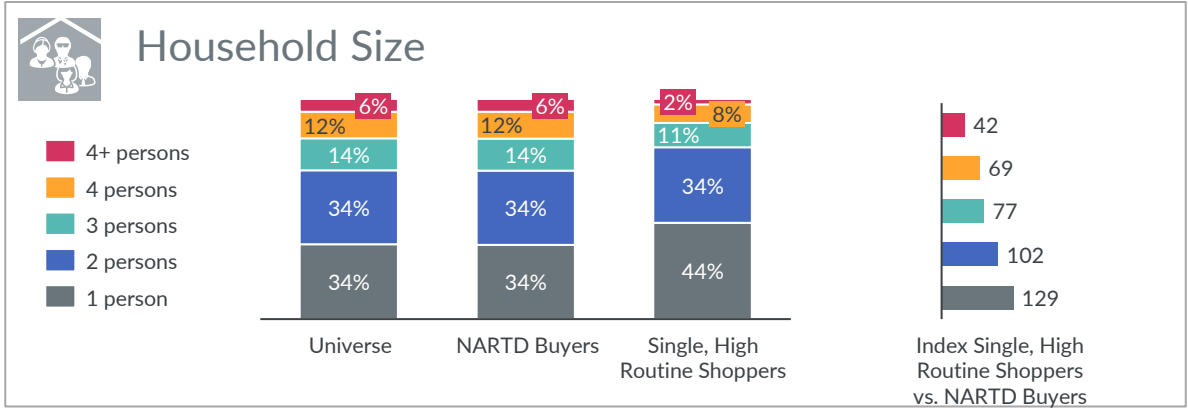
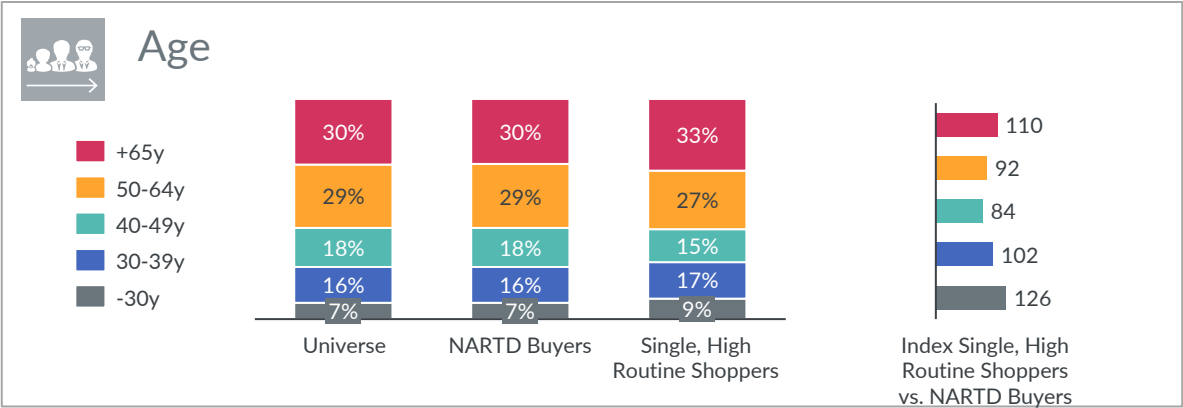
Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



Sociodemographics & Living Situation

Single, High Routine Shoppers



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1

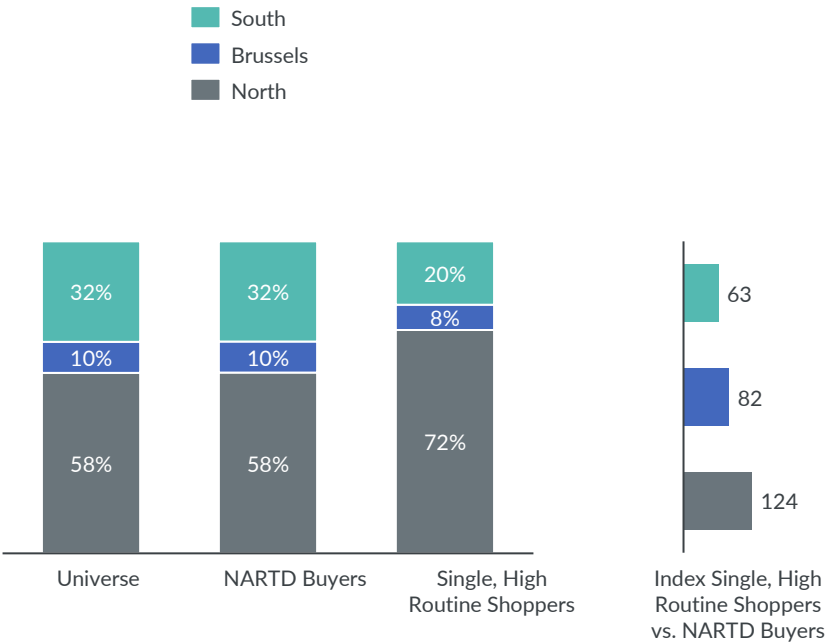


Sociodemographics & Region

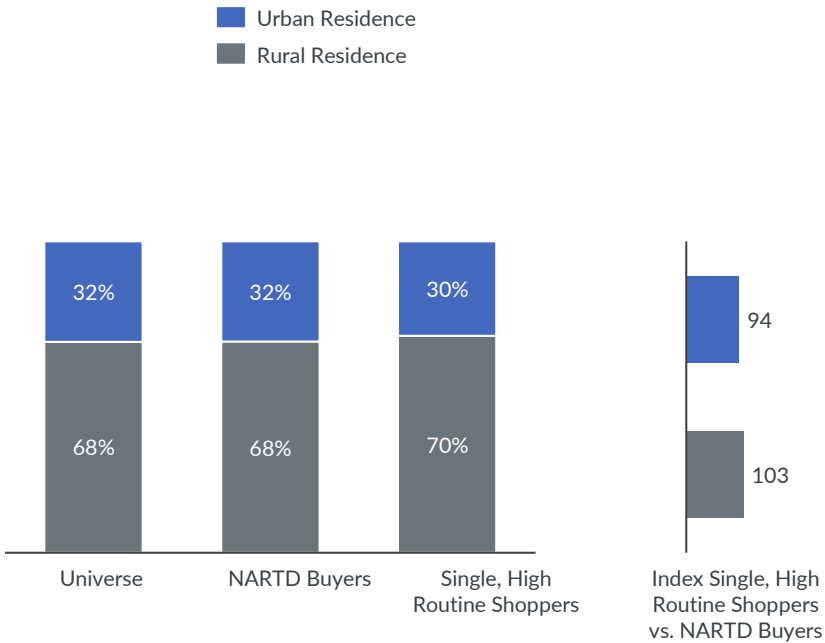
Single, High Routine Shoppers



Region



Urban or rural residence



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



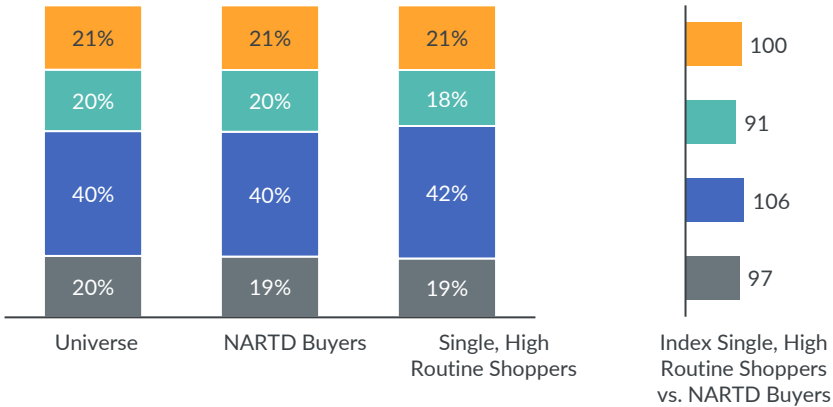
Sociodemographics & Financial Situation

Single, High Routine Shoppers



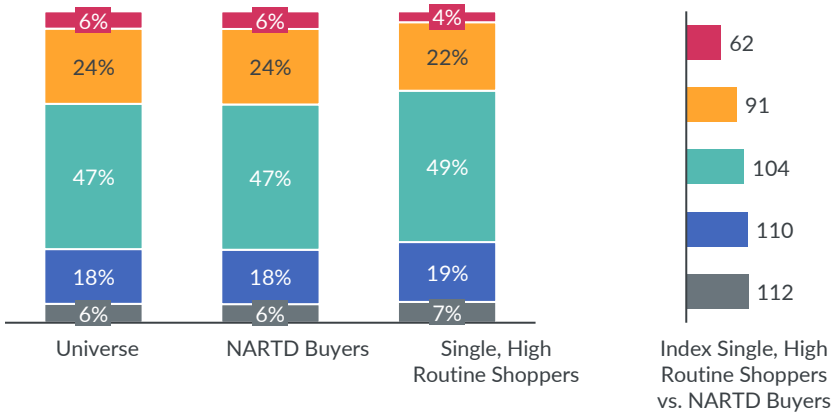
Social Class

- CIM 4 - Lower
- CIM 3 - Medium lower
- CIM 2 - Medium upper
- CIM 1 - Upper



Financial Situation

- I don't have enough to cover my expenses
- I have just enough to make ends meet
- Overall, I am doing alright
- I am well provided for and can afford many things I want
- I don't have to limit my expenses and can afford everything I want



Explanation of the structural situation

The dimension of living conditions forms the foundation of TG analysis



1



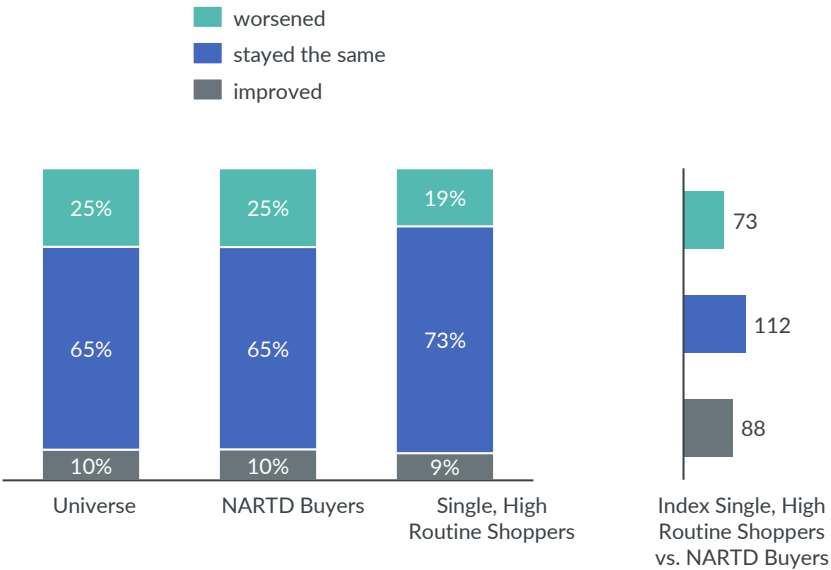
Sociodemographics & Financial Situation

Single, High Routine Shoppers



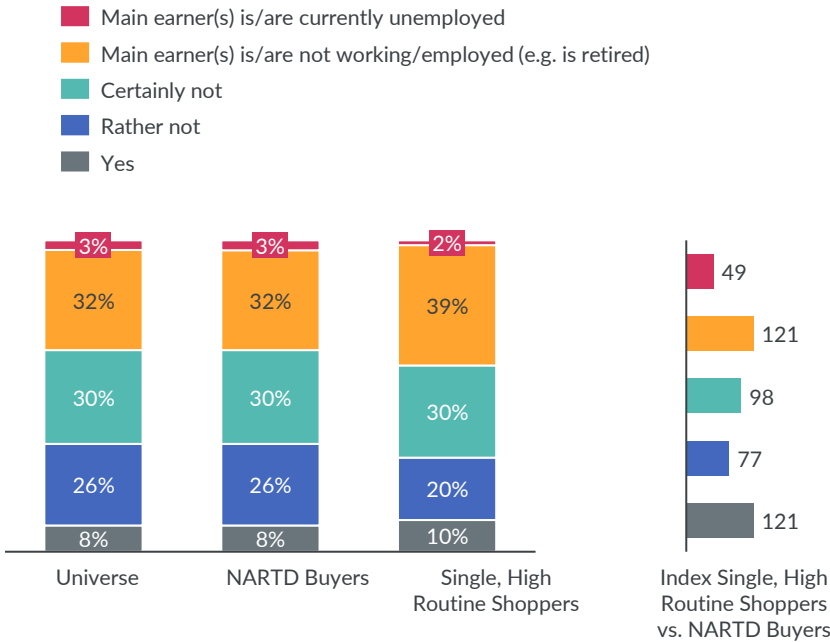
Future Financial Situation

Do you think that in 12 months your financial situation will have



Employment

Could the employment of the main earner(s) in your household be at risk?



Chapter 2: Personal attitudes & Leisure preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences

top and flop statements



Single, High Routine Shoppers

Volunteering/ getting involved in activities of civil society organizations	14%	<div></div> 125
Going to sport events: games/ competitions	7%	<div></div> 112
Spending time with animals	24%	<div></div> 109
Meeting friends	44%	<div></div> 107
Doing sports	24%	<div></div> 106
Going to Spa/Sauna (wellness activities)	14%	<div></div> 77
Do it yourself projects/ activities (DIY)	14%	<div></div> 77
Cooking for pleasure	29%	<div></div> 77
Going to clubs/ nightclubs	2%	<div></div> 51
Meditating, praying, going to church	4%	<div></div> 35

Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers

- The target group in focus is very out of home oriented with a high percentage doing volunteering.
- Spirituality or clubbing are not favorable activities.

Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

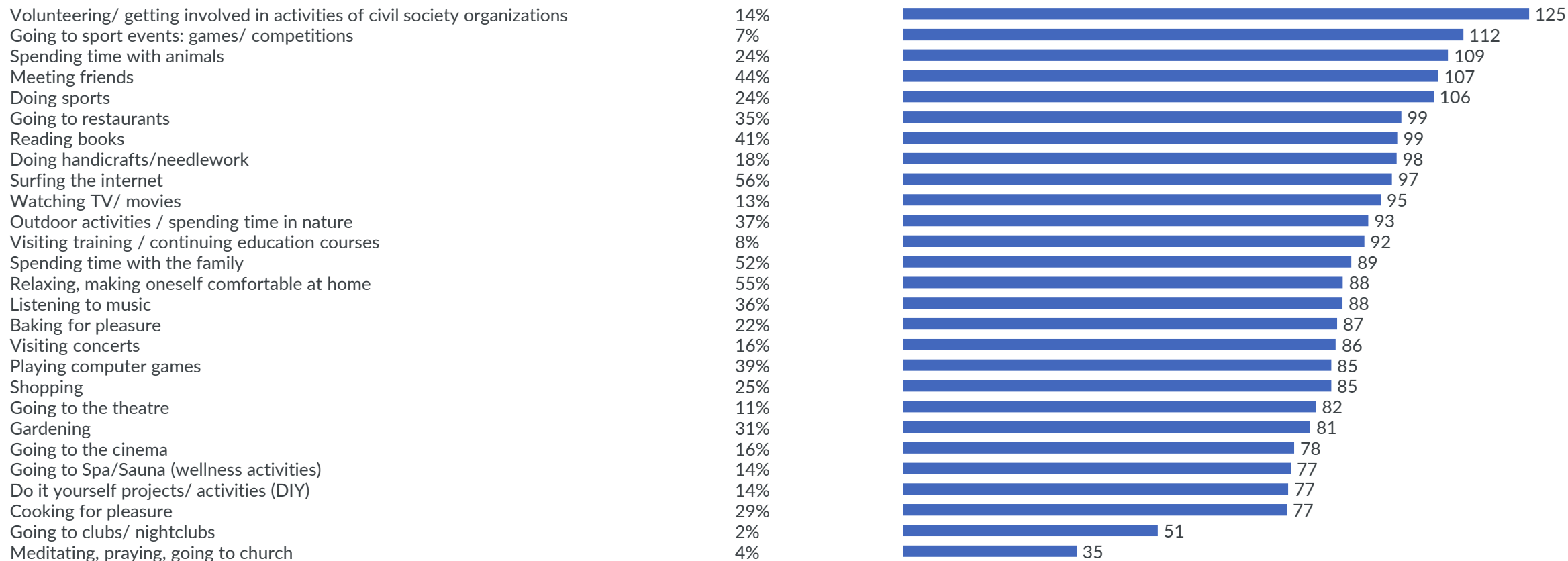
2



Personal attitudes & Leisure preferences



Single, High Routine Shoppers



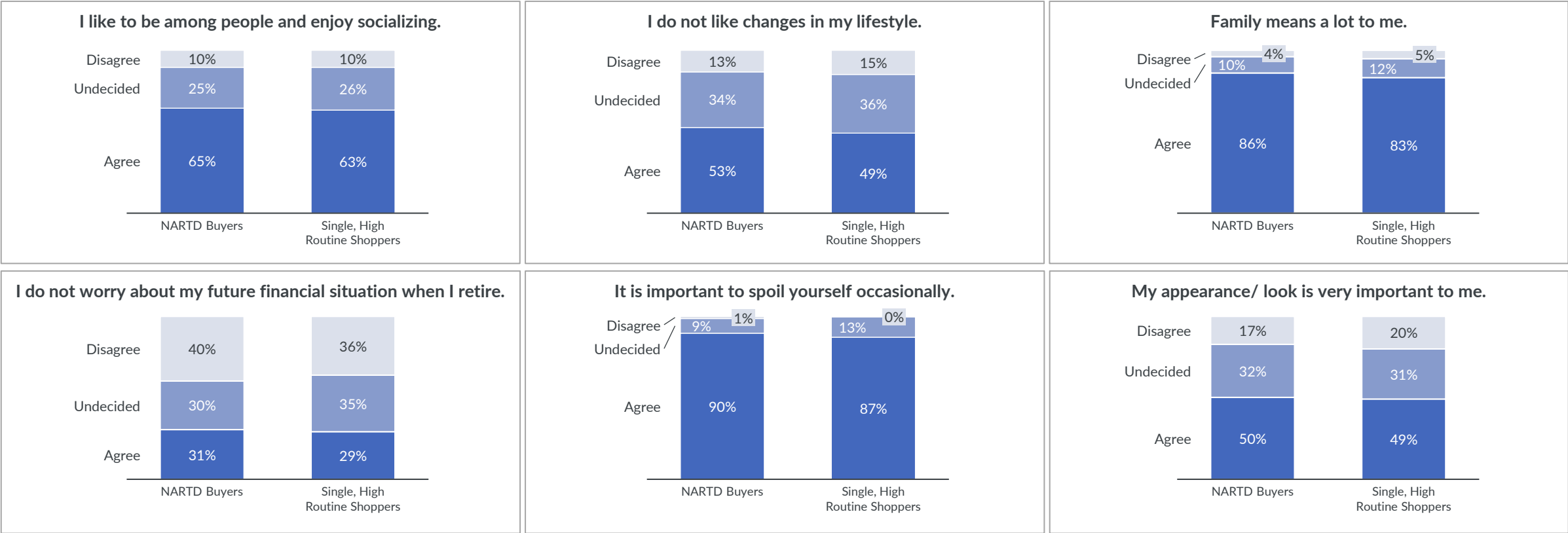
Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences

Single, High Routine Shoppers

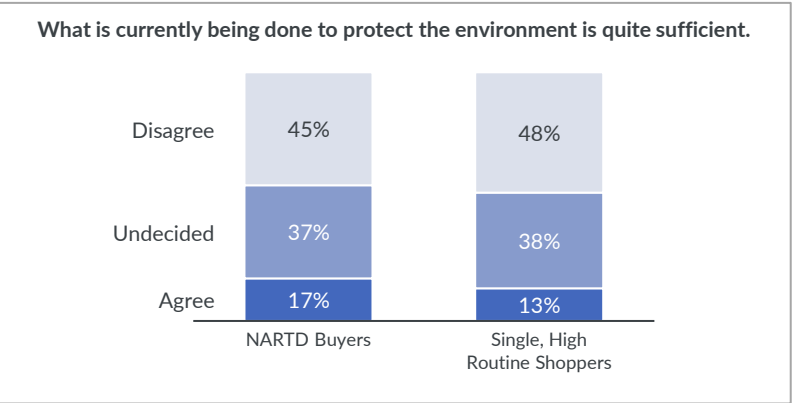
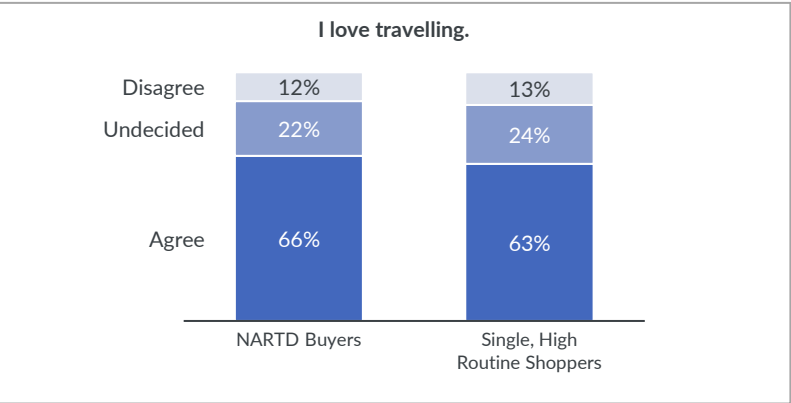
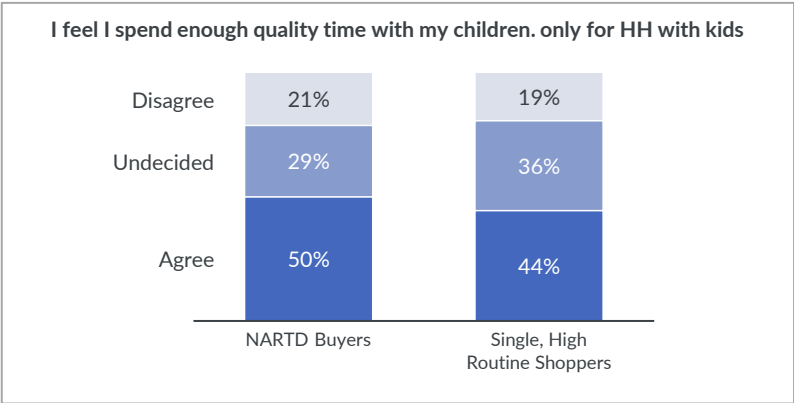
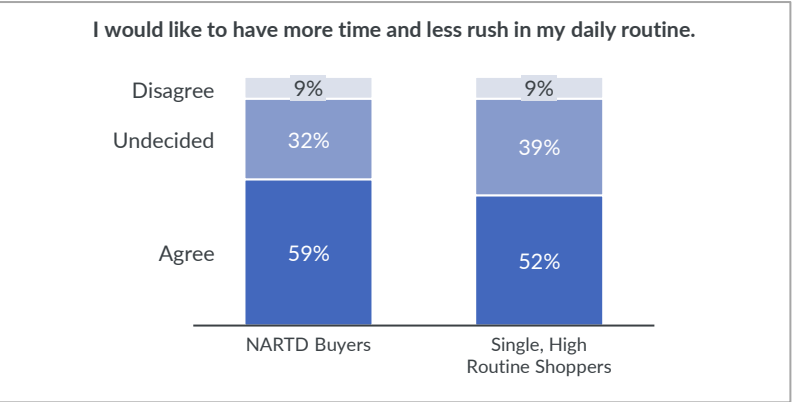
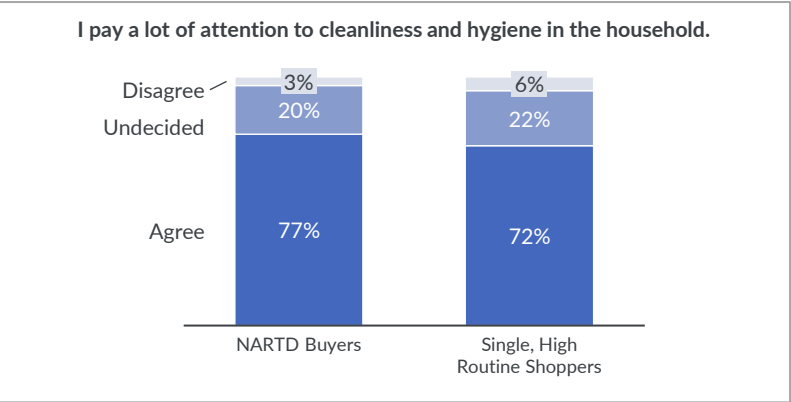
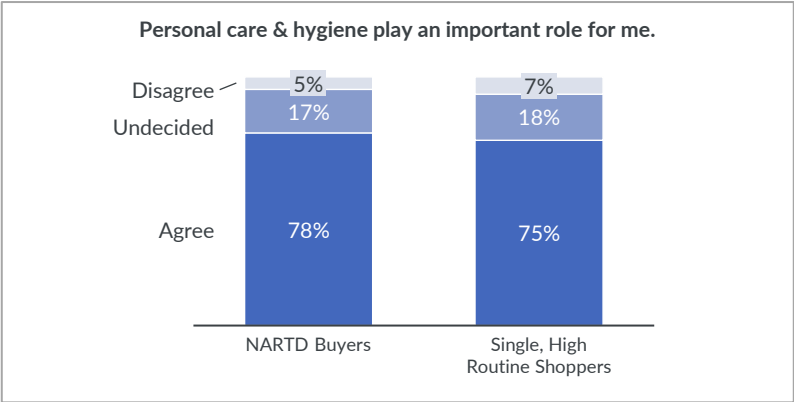


Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?



Personal attitudes & Leisure preferences



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2

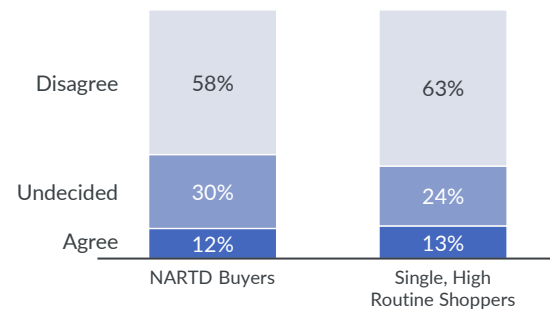


Personal attitudes & Leisure preferences



Single, High Routine Shoppers

I often have newly launched products faster than my friends.



Personal attitudes & Leisure preferences

What are the general values of my target group? What are the leisure time interests?

2



Personal attitudes & Leisure preferences



Single, High Routine Shoppers

● NARTD Buyers

● Single, High Routine Shoppers

Enjoying life in the here and now					Thinking about tomorrow
Buying what you like					Buying what is necessary
Being careful					Daring something/ taking risk
Living an active exciting life					Living a quiet, secluded life
Shopping for groceries is fun					Shopping groceries is annoying
I like to buy things that nobody else has					I don't care if others have the same products
When shopping, I pay particular attention to price					When shopping, I pay particular attention to quality

I completely Agree with left statement

indifferent

I completely Agree with right statement

Chapter 3: Nutrition & Health

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

I exercise regularly to stay fit.	50%	<div></div> 103
I do a lot for my health.	48%	<div></div> 99
When eating and drinking I watch my figure.	46%	<div></div> 98
I take care of my inner, mental health/balance.	54%	<div></div> 97
I like to spoil myself with good food.	83%	<div></div> 94
I consciously pay attention to a healthy diet.	59%	<div></div> 93
I am often on a diet to lose weight / stay in shape.	23%	<div></div> 91
I usually give my children what they want for their meals. only for HH with kids	15%	<div></div> 63

Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers

* Share of agreement (based on total category buyers) Top Box 1+2 on 5-point scale (totally agree – totally disagree)



Single, High Routine Shoppers

- The focus target group pays attention to staying in shape.
- A healthy diet is not "top of mind" in the target group.

Nutrition & Health

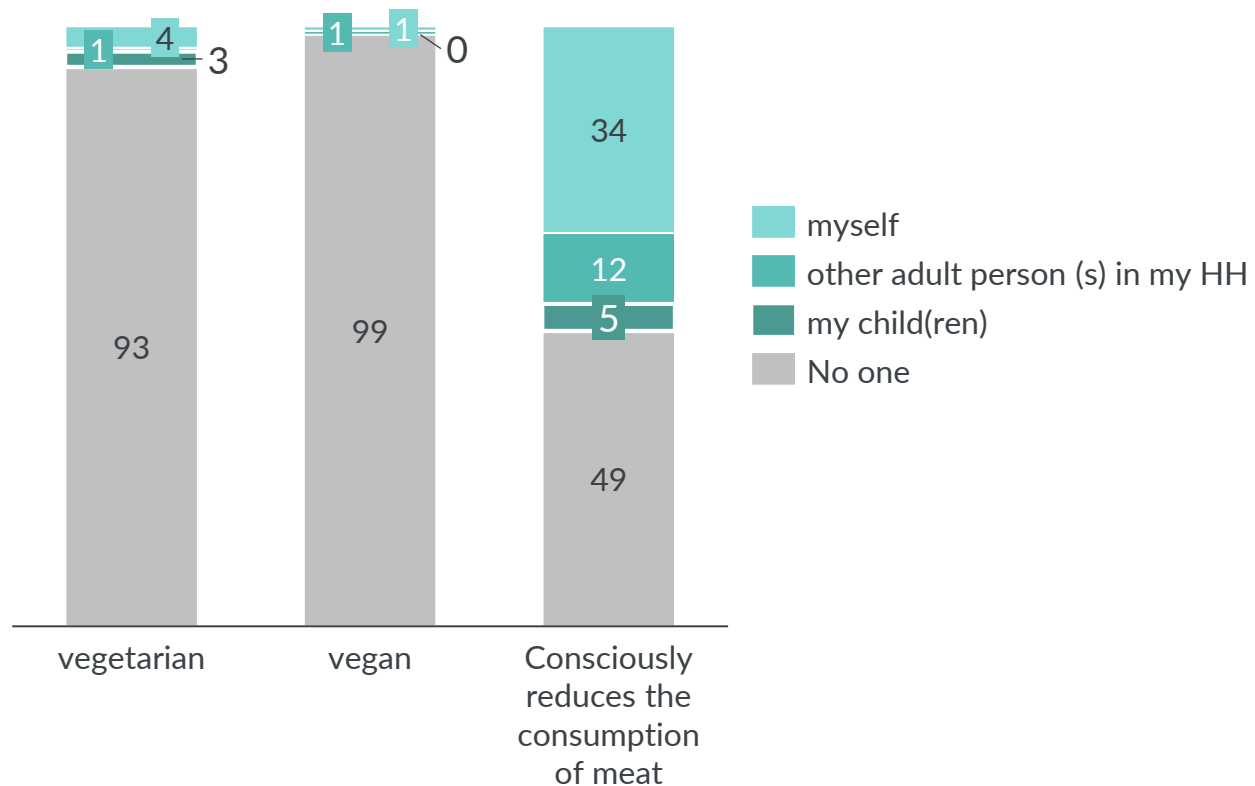
Special Nutrition patterns

3



Nutrition & Health

Share of different nutrition styles in the households



Single, High Routine Shoppers

- The focus target group pays attention to their meat consumption, but abstains from a purely plant-based diet

Nutrition & Health

What is paid attention to in terms of Nutrition & Health

3



Nutrition & Health

top agreement statements

Other allergies or intolerances	9%	119
Lactose intolerance	7%	110
I prefer not to answer	3%	107
Diabetes	10%	103
No, relevant health conditions with impact on shopping behavior	60%	100
Others, not mentioned here	4%	96
High blood pressure	10%	96
High cholesterol level	13%	86
Coeliac disease (gluten intolerance)	2%	68
Skin problems	6%	50

Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers



Single, High Routine Shoppers

- More allergies/intolerances than on average
- Fewer cases of skin problems & high cholesterol.

Chapter 4: Cooking & OOH Consumption

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Cooking & OOH Consumption

Attitudes and habits regarding cooking and OOH Consumption

4



Cooking & OOH Consumption



Single, High Routine Shoppers

I often eat quickly and 'on the go'.	10%	151
I often order takeaway food, delivered at home or for pick up).	7%	124
I can hardly imagine cooking without convenience products (e.g. instant sauces, frozen or tinned food).	19%	120
I often eat out (canteen, cafe, restaurant, etc.).	13%	116
I prefer to cook meals that do not take a lot of time to prepare.	46%	99
I like to cook.	60%	98
The easier the cooking, the more I like it.	45%	93
At home we cook hot meals every day/very often.	82%	91
I love to cook fancy/exceptional dishes and meals.	19%	69

Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers

- The target group does not like to cook at home & prefers takeaway food & convenience products.
- They eat on-the-go & like to eat out.

Chapter 5: Purchase Preferences

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

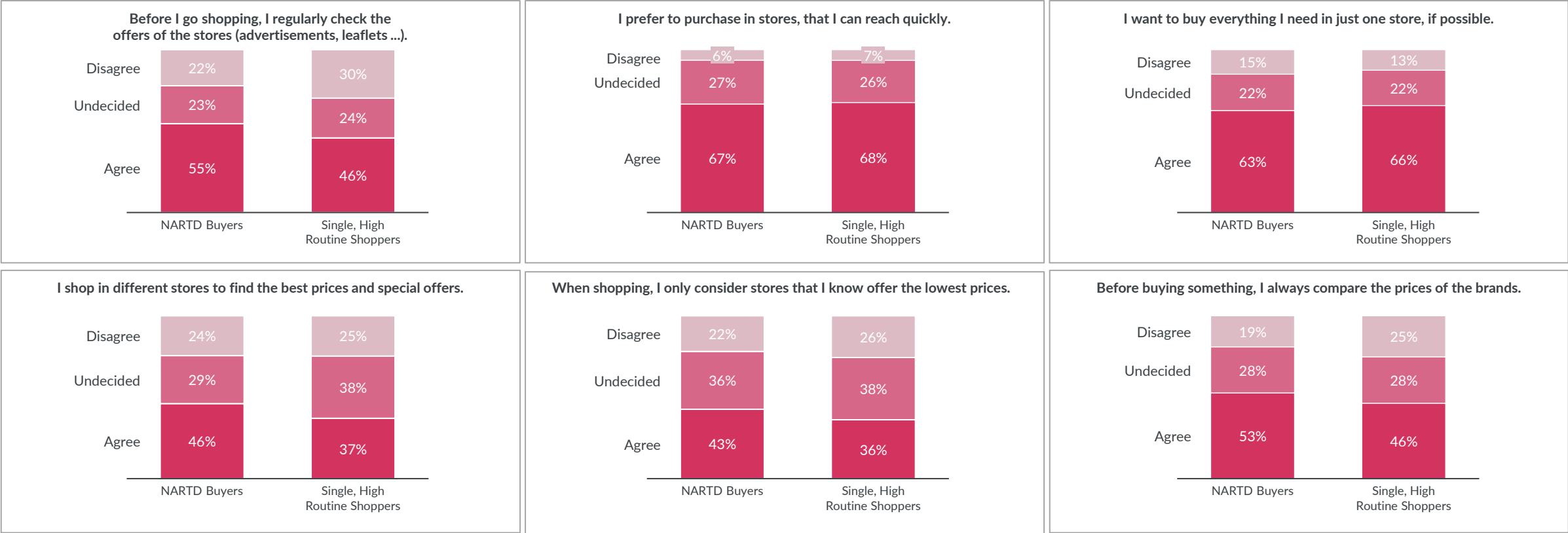


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

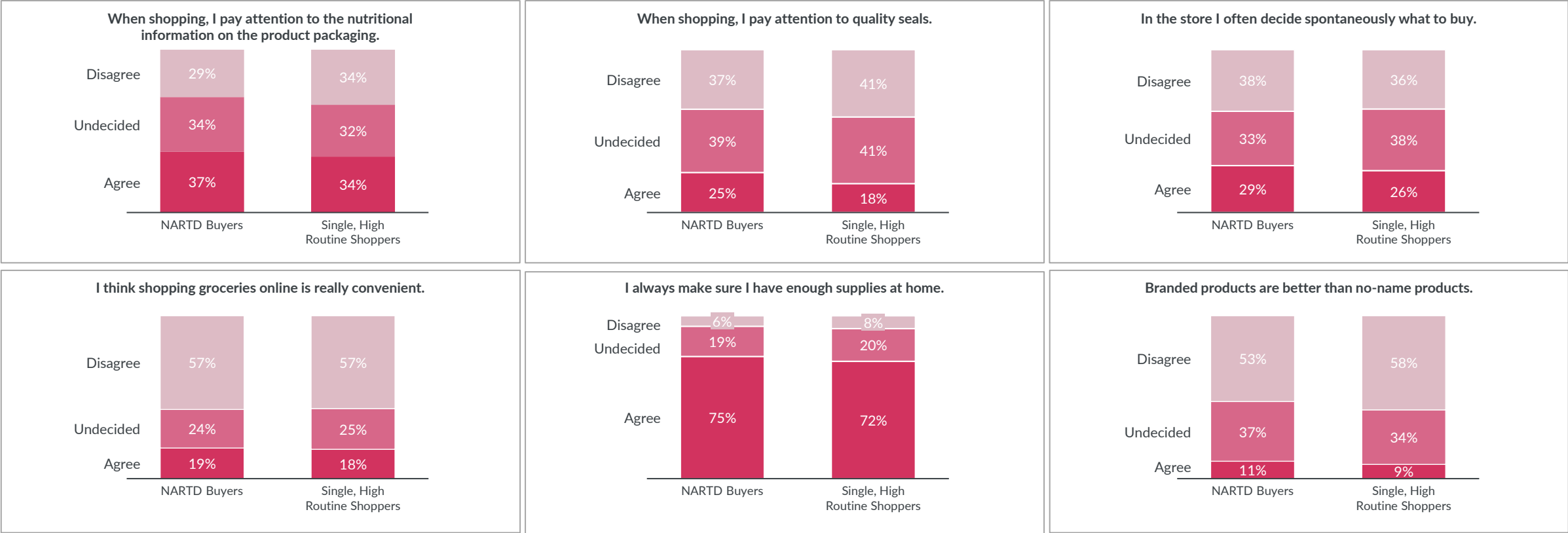


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences

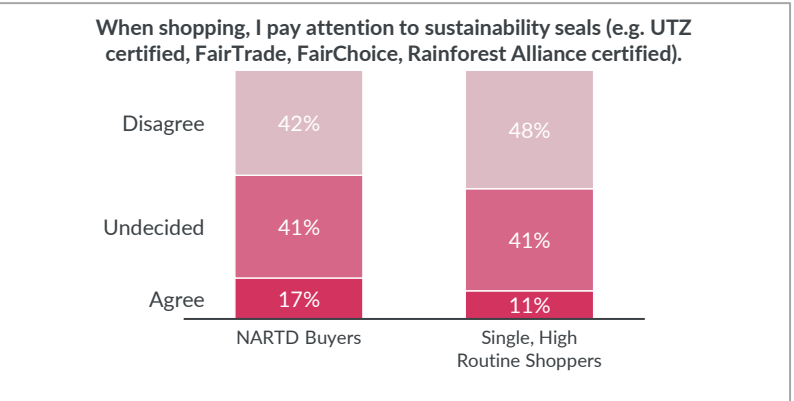
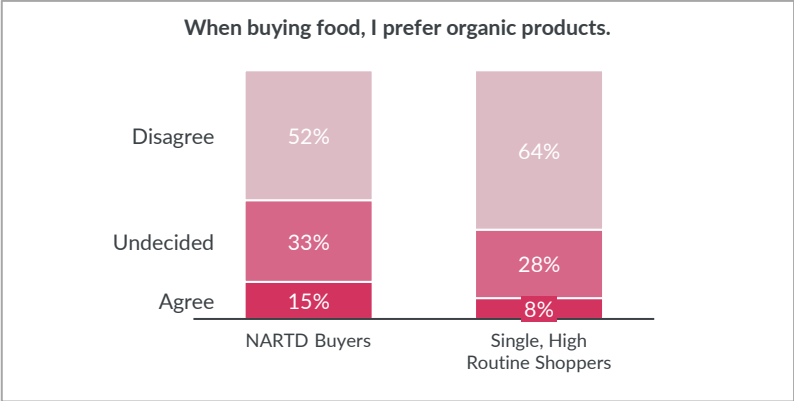
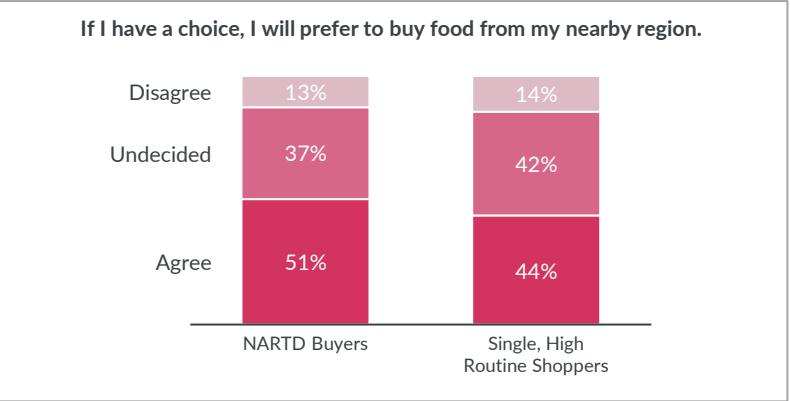
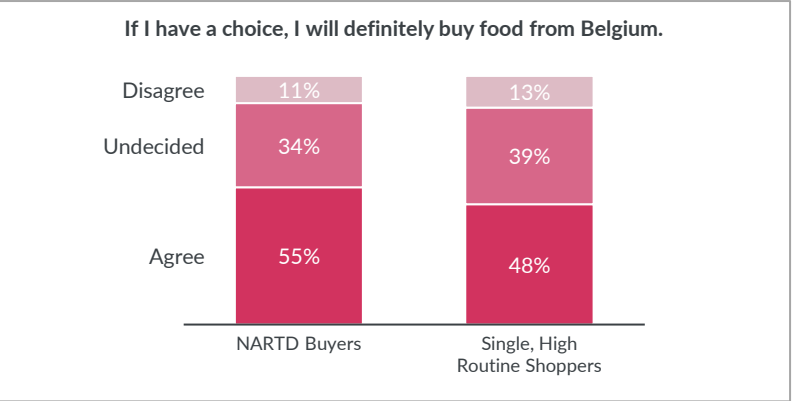
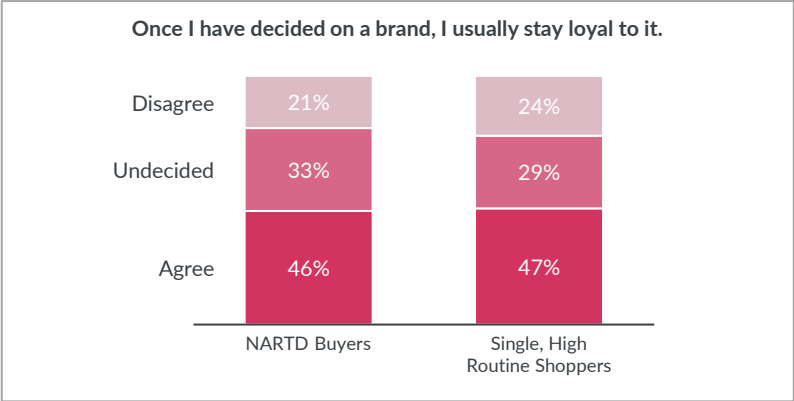


Purchase preferences

What do shoppers consider when they purchase?



Purchase Preferences



Purchase preferences

What do shoppers consider when they purchase?

5

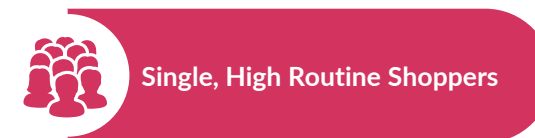


Purchase Preferences



Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers



- The target group likes High fibres/protein, light/zero & low-fat products.
- They origin of the ingredients is of lesser importance to them. Same for climate friendliness & allergens.

Purchase preferences

What do shoppers consider when they purchase?

5



Purchase Preferences



Single, High Routine Shoppers

Products which are produced in an environmentally friendly manner	24%	107
Products without long transport	21%	100
Environmentally friendly packaging	37%	100
Fairly produced and traded products	24%	93
Products contributing to animal welfare	25%	89
Products free from palm oil	22%	82
Climate-neutral / carbon-neutral products	8%	68
Products made from natural ingredients	37%	66
Organic / bio products	9%	46

Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers

- The target group cares about the product's impact on the environment, but is less interested in animal welfare, fair trade or the origin of the ingredients.

Chapter 6: Factual purchasing behaviour

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Part 6 will be
delivered
with
segmentation

Chapter 7: Important features of retailers

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET



Important Features of Retailers

Criteria for choosing a retailer

7



Important Features of Retailers

top and flop statements

Possibility for self-scanning / self-checkout	27%	117
Nice, pleasant atmosphere	62%	104
Clean and tidy store	90%	102
Easy to find products on shelves	83%	102
Large variety in pack sizes to meet my needs	66%	102
Loyalty card / loyalty program	64%	92
Availability of local/regional products	42%	84
Offers a delivery service	12%	79
Wide range of well-known brands	46%	79
Attractive organic assortment	22%	64

Share of agreement
NARTD Buyers

Index Single, High Routine
Shoppers vs. NARTD Buyers



Single, High Routine Shoppers

- The target group prefers a quick, easy & clean store layout within a nice atmosphere.
- They do not really care about an organic, local or branded assortment. Neither do they expect a loyalty program or delivery service.

Important Features of Retailers

Criteria for choosing a retailer

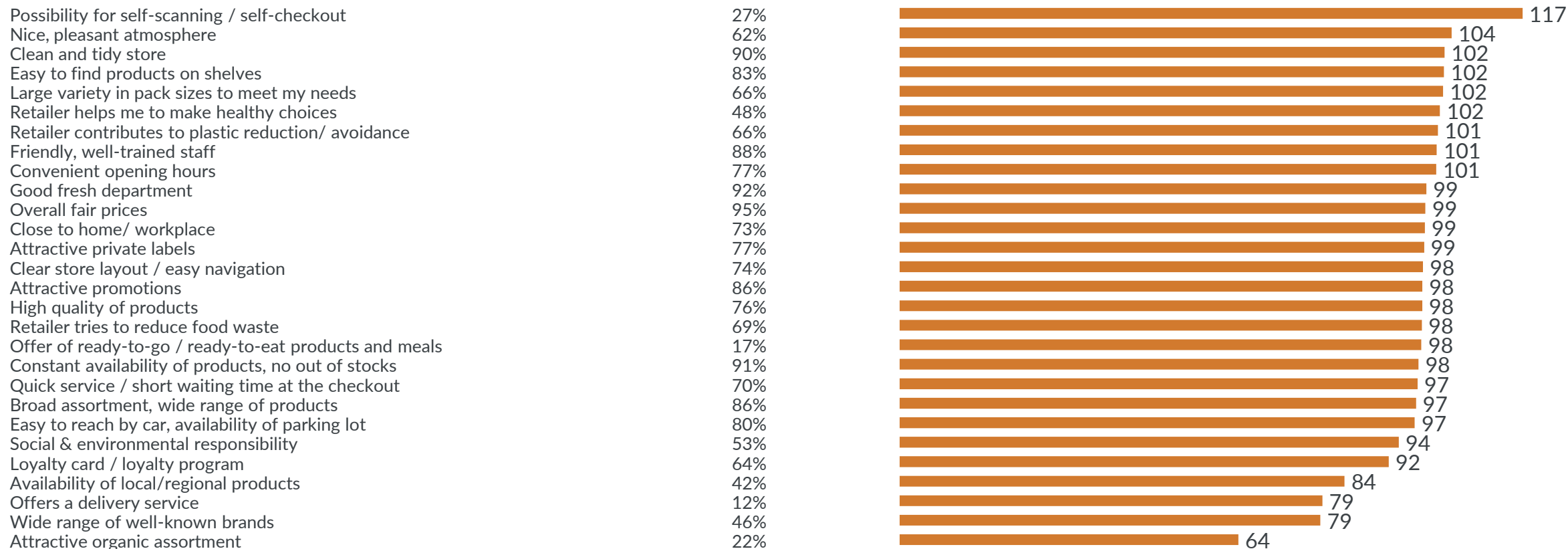
7



Important Features of Retailers



Single, High Routine Shoppers



Chapter 8: Media behavior & Advertising usage

1. Sociodemographics & Living Situation



Region,
Age,
Household size,
Financial situation
...

5. Purchase Preferences

Attitudes towards offline & online shopping
Criteria for product choice
Orientation to new products
Importance of organic & sustainability
...



2. Personal attitudes & Leisure preferences



Role of social environment
Self care,
Concerns in life,
Spare time activities
...

6. Factual purchasing behaviour

KPIs for category & brand
Relevant set of brands, segments, products
Preferred channels and retailers
PL & promo shares
...



3. Nutrition & Health



Values vs. food
Nutrition principles & patterns,
Body shape awareness,
Health conditions
...

7. Important features of retailers

Product range
Pricing
Atmosphere
Delivery service
...



4. Cooking & OOH Consumption



Frequency of home-cooked meals
Effort
Time and ease aspects
Eating out and use of takeaway
...

8. Media behavior & Advertising usage

Frequency of different types of media usage
Susceptibility to advertising
Attitude to leaflets
Influence of information conveyed in media on purchase behavior
...



TARGET

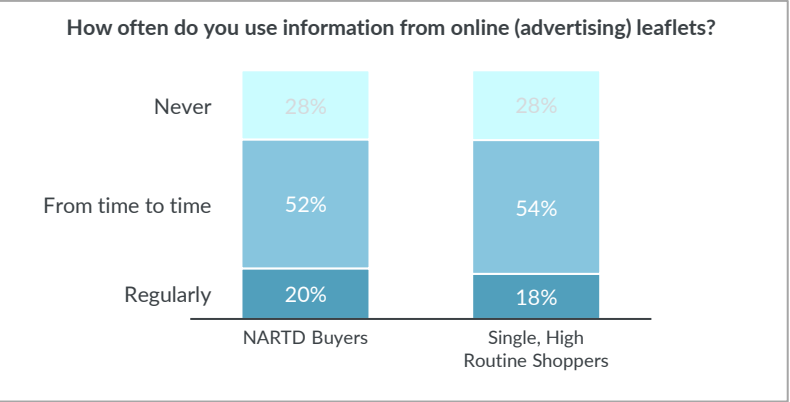
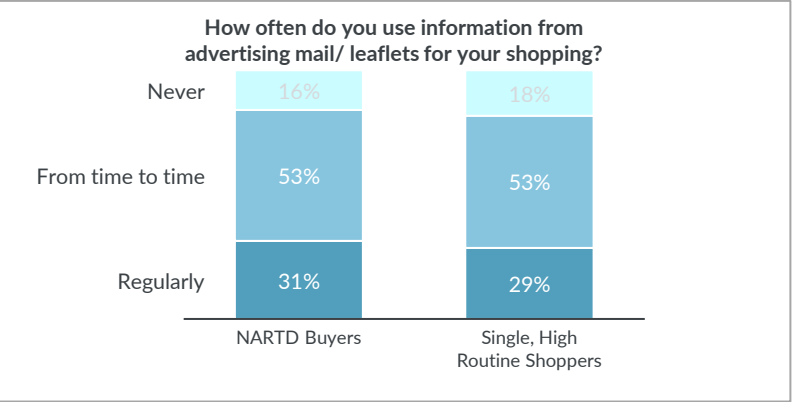
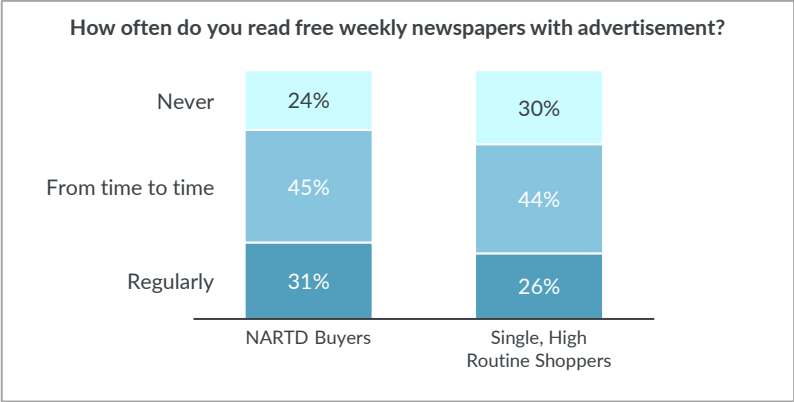
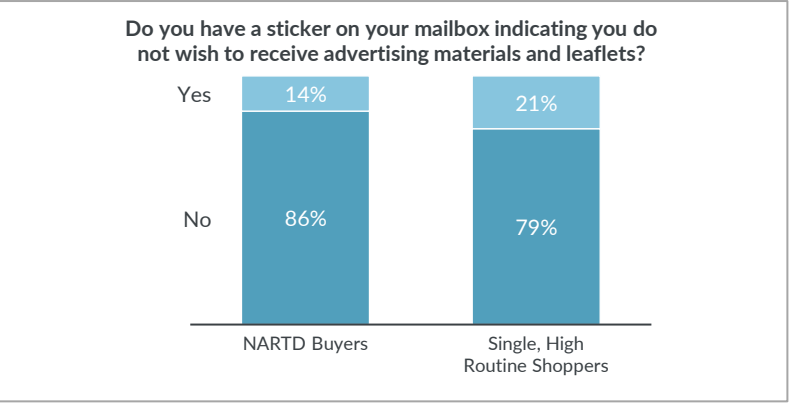
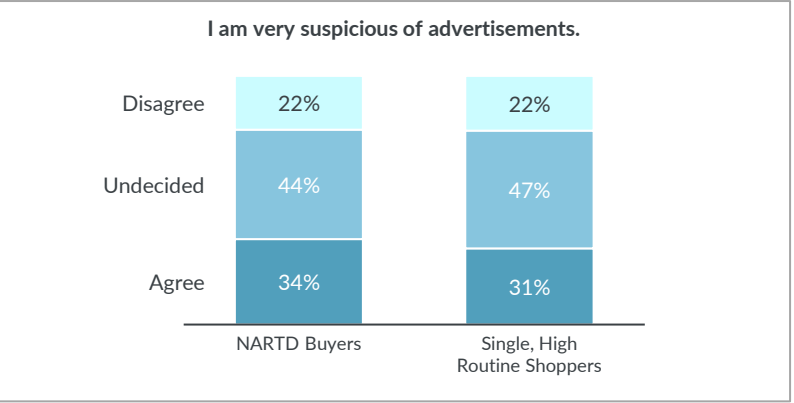
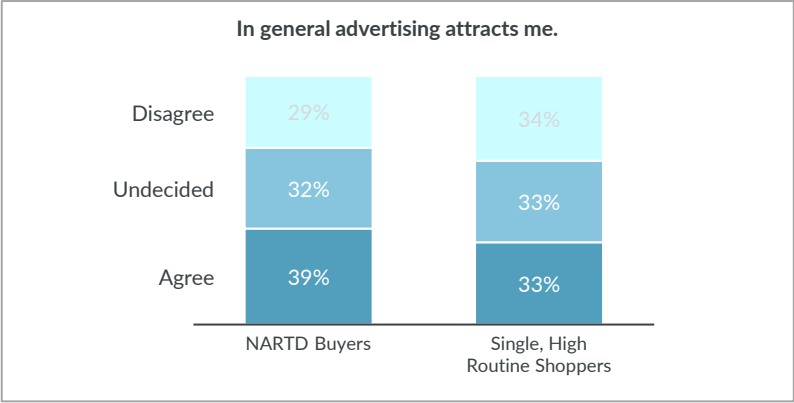


Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



Media behavior & Advertising usage



Media behavior & Advertising usage

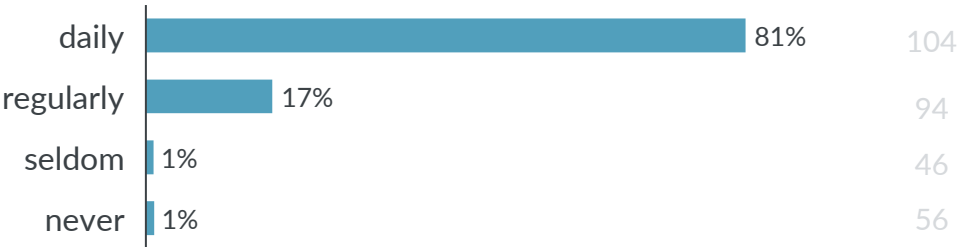
Attitudes and receptivity to media and advertising



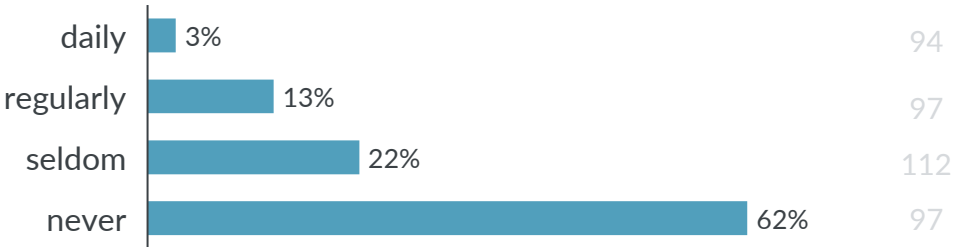
Media behavior & Advertising usage

Single, High Routine Shoppers

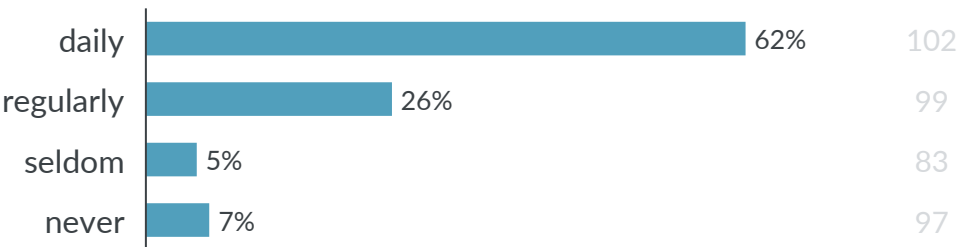
How often are you watching tv



How often are you listening to podcasts



How often are you listening to the radio



How often are you reading magazines



Media behavior & Advertising usage

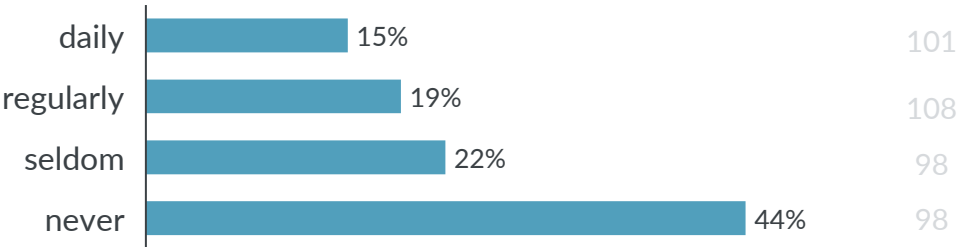
Attitudes and receptivity to media and advertising



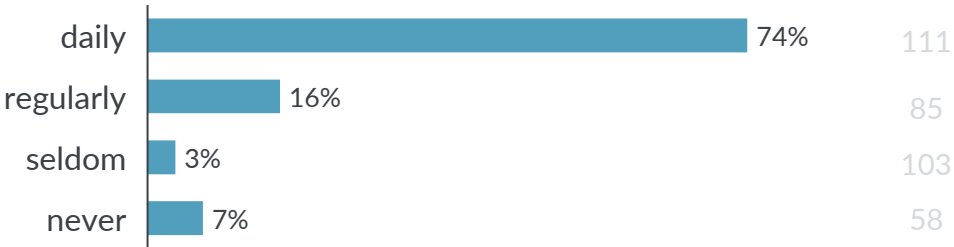
Media behavior & Advertising usage

Single, High Routine Shoppers

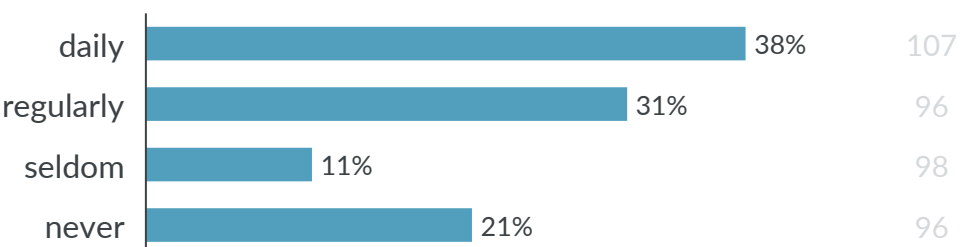
How often are you reading (printed) newspapers



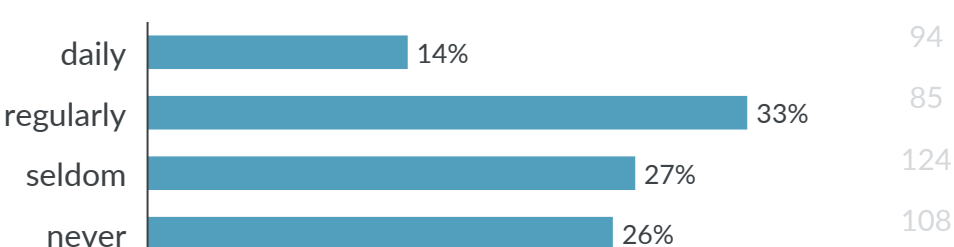
How often are you social media (e.g. facebook, instagram, twitter, tiktok)



How often are you view online newspapers / news channels



How often are you watching video clips on the internet (e.g. youtube)



Media behavior & Advertising usage

Attitudes and receptivity to media and advertising



8

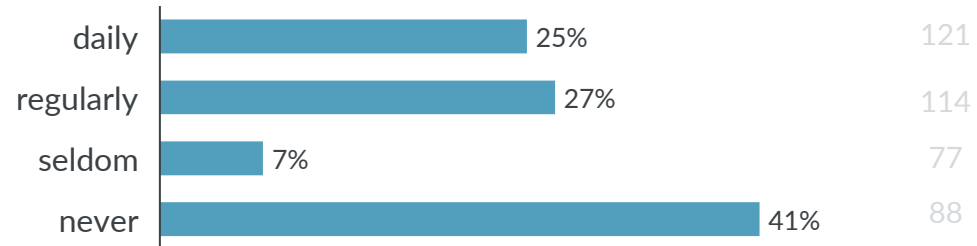


Media behavior & Advertising usage



Single, High Routine Shoppers

How often are you using paid streaming services (e.g. spotify, netflix, amazon prime, etc.)



Surfing the internet (otherwise)

