



who cares? who does?

HEALTH



SUSTAINABILITY



Europanel's solution looking into strategic topics and helping clients turn insights into actions.



who cares? who does?

HEALTH

Offers:

- Country Report
- Category Report
- Cross Country Report

Report Release:

October 2024



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SUSTAINABILITY

Offers:

- Category Plus Report
- Eco Segment Tracking

Report Release:

October 2024

Thought Leadership Reports & Webinars:

September & October 2024

What to use WCWD for?



Market Maturity

- Size of shopper segments
- Growth rate of sustainable shoppers
- Comparison with other countries
- Your brand and category share

Develop your targeting

- Demographic profile of shoppers
- Understand attitude and motivations
- Understand shoppers' claimed actions
 - How engaged are shoppers on relevant behaviors

Quantify your opportunity

- Value of most engaged shoppers in your category
- Do engaged shoppers buy your brands and whether this has changed over time?
- Predict how big engaged shoppers will be in the future

Build your go to market plan

- Shopping behaviour of the most engaged shoppers inc.
 - What categories, brands and formats shopper segments purchase at macro level
 - What brands, formats, pack sizes, stores are used by shopper segments at category level
- Evidence backed case studies

who cares? who does?

HEALTH



Understand how health influences shopper, segment trends, attitudes around the world



Establish the role of retailers and manufacturers within health



Maximize the success of your brand strategy by targeting global & local health trends



Identify and target consumer segments with actual behaviour to optimize performance



34 Markets in 2024

APAC

China
India
Indonesia

EUROPE

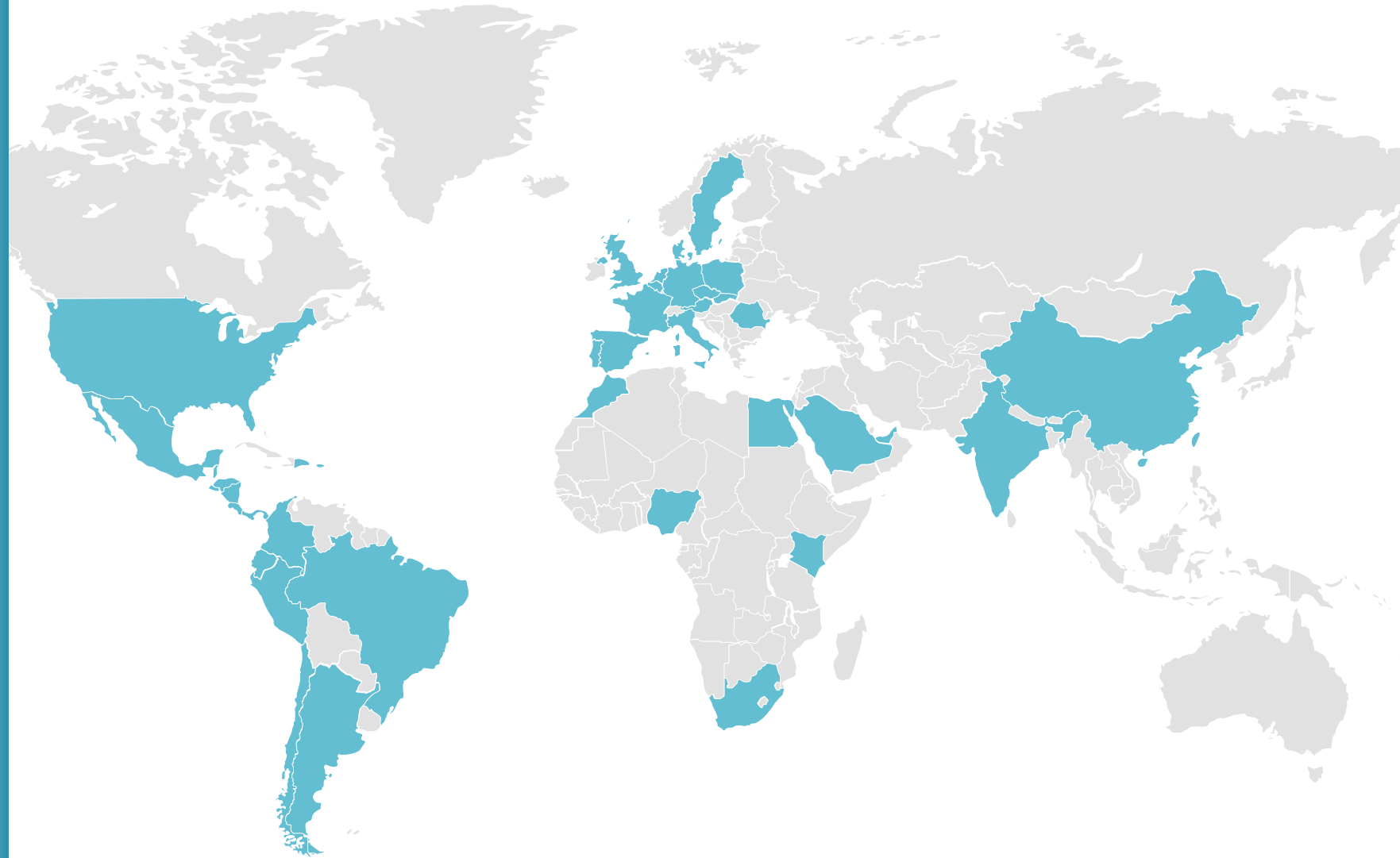
Austria
Belgium
Czech Republic
Denmark
France
Germany
Great Britain
Italy
Netherlands
Poland
Portugal
Romania
Slovakia
Spain
Sweden

AMERICAS

Argentina
Brazil
CAM
Chile
Columbia
Ecuador
Mexico
Peru
USA

MEA

Egypt
Kenya
Morocco
Nigeria
Saudi Arabia
South Africa
UAE



AU, BE, CZ, DN, DE, IT, NL, PL, RO, SL, SE provided by GfK - CPS
Americas, APAC, MEA and FR, GB, PT, ES provided by Kantar

Single source survey and panel capability to best understand consumer behaviour

New survey content aimed at understanding health trends

Meet the Segments

- Segmentation explanation – how were the segments created?
- Segment profiles – shopper description, FMCG worth, demographics
- Macro purchase KPIs
- Categories favoured/rejected by segments

Overview of Health

- Measure overall and prioritization of mental and physical wellbeing
- How common are vegan, vegetarian & reducing meat consumption diet behaviours
- Understand which health conditions are worrying shoppers (ex. Allergies, Intolerances)

Health Perceptions

- Can healthy food be indulgent?
- Which products are perceived as harmful or beneficial for health? (ex. Supplements, Plant Based, Processed Foods)
- Which factors are believed to have the greatest negative impact on health? (ex. Disease, Stress, Lack of Sleep)

Actions & Behaviours

- Explore treating behaviours and reasons behind
- Common and uncommon diet & lifestyle practices to stay healthy (ex. Balanced diet, exercise, limit screen time)
- Specific actions taken to manage stress/sleep, weight, and skin health challenges (ex. Natural, OTC or other remedies)
- Top barriers to purchasing healthy packaged food and beverages (ex. Inconvenient, prices, limited assortment)

Attitudes of Manufacturers/Retailers

- Who is most responsible to ensure a healthy life? (ex. Governments, Brands, Retailers, Individuals)
- What is the role of the manufacturer/retailer to promote a healthy life? (ex. Labelled products, reward healthy behaviour)
- Are retailers helping shoppers achieve a healthy lifestyle?

Access options

Country Report

Off-the-shelf PowerPoint deck examining mental and physical wellbeing, who are health engaged shoppers and what are their lifestyle/diet actions, helpful vs harmful products and actions for retailers/manufacturers. c45 slides combining charts, a data-backed case study, summaries including attitudes, motivations and purchase data.

Category Report

Category specific PowerPoint deck examining the purchase behaviour of health engaged shoppers in your categories. Created with fixed template c15 slides which can be tailored to your specifications. Follow the story of your brands, understanding their performance with shoppers and quantifying opportunities.

Cross Country Report

Combination of country and category report insights in a PowerPoint deck across multiple markets and/or categories. After purchasing individual reports data can be used to find similarities and differences across markets.

Bespoke access

Add segments or statements to your category databases for a deep dive on purchase behaviour by a client/category trained consultant.



who cares? who does?

SUSTAINABILITY



Harmonized survey
from 20+ countries



Understand 6 year eco segment trends
and other sustainable behaviours



Link segments to category databases to look
at what is bought by those that say they care
about sustainability



Our 6th year of helping companies understand what sustainable shoppers purchase

LOOKING BACK



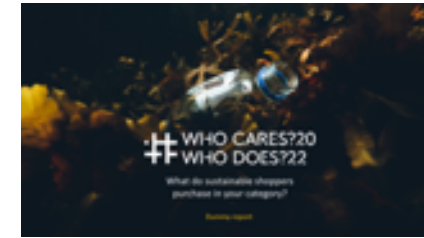
2019



2020



2021



2022



2023

32 Markets in 2024

AMERICAS

'19, '22 – '24	Argentina
2019 – 2024	Brazil
2024	CAM
2019 – 2024	Chile
2019 – 2024	Columbia
2020 – 2024	Ecuador
2019 – 2024	Mexico
2019 – 2024	USA
2019 – 2024	Peru

APAC

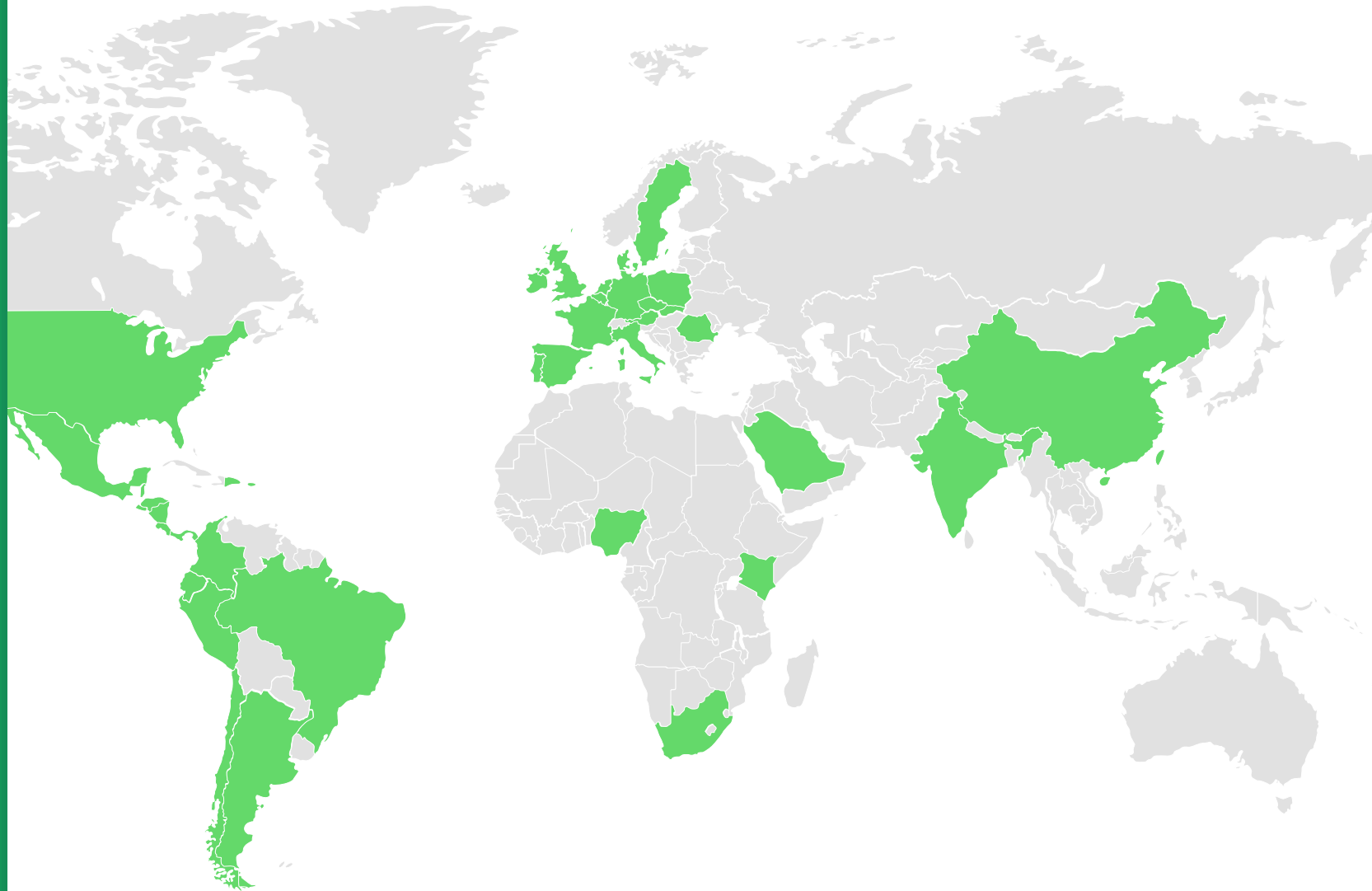
2019 – 2024	China
2019, '21 – '24	India
'19-'20, '23-'24	Indonesia

EUROPE

2019, 2024	Austria
2019, '21 – '24	Belgium
2019 – 2024	Czech Republic
2019, 2023, 2024	Denmark
2019 – 2024	France
2019 – 2024	Germany
2019 – 2024	Great Britain
2020 – 2024	Ireland
2020 – 2024	Italy
2019, '21 – '24	Netherlands
2019 – 2024	Poland
2020 – 2024	Portugal
2023 – 2024	Romania
2019 – 2024	Slovakia
2019 – 2024	Spain
2019, 2023, 2024	Sweden

MEA

2023, 2024	Kenya
2023, 2024	Nigeria
2021, '23-'24	Saudi Arabia
2023, 2024	South Africa



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2024 edition of Who Cares? Who Does?

6th year of sustainability segmentation



Eco Actives



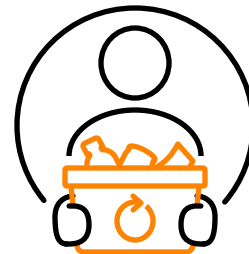
Highly concerned about the environment and plastic waste.



Taking the most actions to reduce their waste.



They feel an intrinsic responsibility to be more sustainable, follow the topic more actively and have a greater awareness.



Eco Considerers



Worried about the environment and plastic waste.



Not taking many actions to reduce their waste.



Their biggest barriers are convenience and price.



Eco Dismissers



Little or no interest in the environment and making no steps to reduce waste.



They do not think they make a difference.



The topic rarely features amongst friends and family and lack awareness of environmental concerns.

Access options

Category Plus Report

Follow the story of your brands, understanding their performance with sustainable shoppers and quantifying opportunities, c32 slides. Contextual survey background on sustainability shopper attitudes and perceptions, c17 slides. Focus on Category specific PowerPoint deck examining the purchase behaviour of sustainable shoppers in your categories. Created with fixed template c15 slides which can be tailored to your specifications.

Eco Segment Tracking Report

Excel deliverable measuring KPIs of eco segment shoppers across time to understand category and brand performance.

Bespoke access

Add segments or statements to your category databases for a deep dive on purchase behaviour by a client/category trained consultant.

