

Family Food

Milk and dessert products

Foundational study on the purchase and use
of food products in German families

October 2024

iconkids & youth international research GmbH

Rückertstraße 4 80336 München
info@iconkids.com
www.iconkids.com



Family Food - The well-founded analysis of market, target group and brand.

1. The foundational study

Market analysis: The fundamental values and attitudes of parents in Germany.

- We record parents' core values, which guide **their children's upbringing**, as well as **purchasing motives and product preferences**.
- Summarized in **personas**, we map the **key parent segments** for you in the German family market.
- For each of the **product categories covered**, we carry out a **driver analysis** to determine what is really responsible for the purchase of your products.
- In a **positioning analysis**, we show how different **brands perform in the category**.

2. The extension for your brand

Focus on your brand: Based on the basic study, we show where your brand stands in the German family market and what potential it has.

- How does your brand fit into the **value cosmos of parents**?
- Which of the **product requirements of parents** and **category drivers** does your brand serve? What makes you unique and where could you improve?
- Which **parent segments** are you currently addressing with your brand and how are you achieving this? Which other segments could you conquer?
- Where are there **niches in the market** that you could fill with the introduction of **new products**?

Family Food - The well-founded analysis of market, target group and brand.

The categories:

Family Food Dairy and dessert products

These 6 categories were surveyed in detail:

- **Cheese products** from the chiller cabinet
- **Desserts for spooning** from the chiller cabinet (pudding, jelly)
- **Flavored dairy products for spooning** from the chiller cabinet (yogurt, cream cheese products, quark)
- **Flavored milk products for drinking** (drinking yogurt, milk, cocoa, ...)
- **Milk-based snacks and bars from the chiller cabinet**
- **Dual-chamber dairy products**



1 The basis of the study

To understand the family food market one must first understand the families.

That's why we asked them. Exactly.



1

Family Food records values and attitudes that influence the use of your products in the family.



**General values
and lifestyle**

*Conservative vs. progressive,
technology-open vs.
technology-critical upwardly
mobile vs. security-oriented,
hedonistic vs. ascetic*



**Personal
parenting style**

*Directive vs. permissive,
cooperative vs. authoritarian,
protective vs. demanding,
strategic vs. situational-
impulsive*



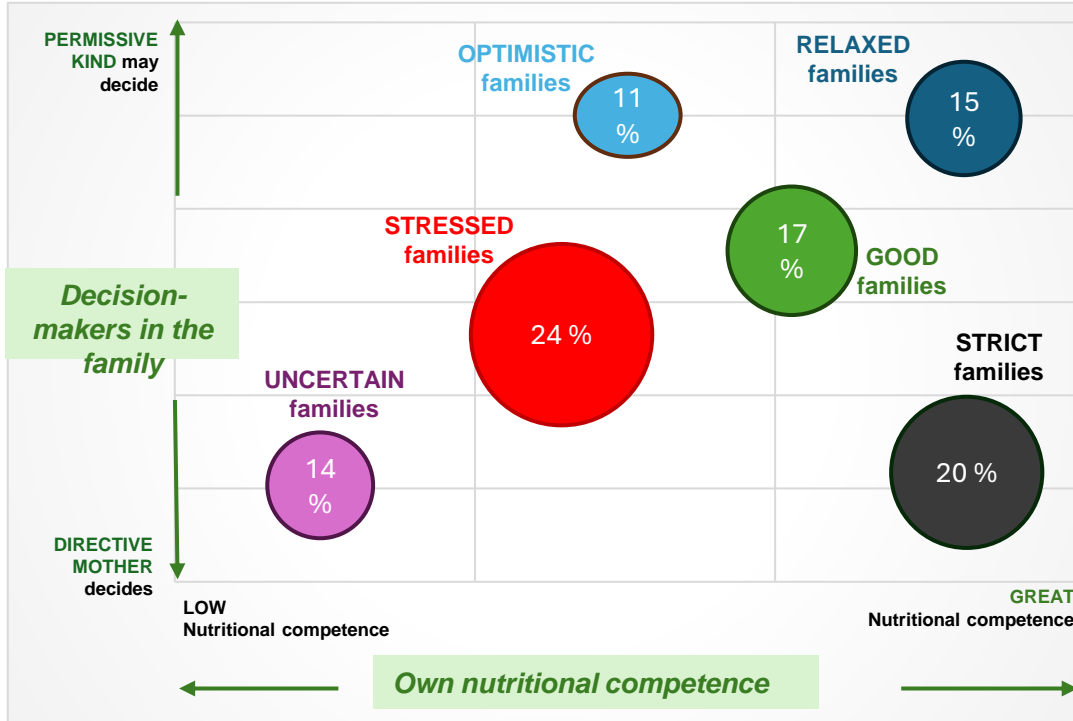
**Attitude
towards
nutrition**

*Relevance of quality, prestige,
price, health, sustainability,
convenience, child-friendly
implementation ...*



Values, parenting styles and attitudes towards nutrition summarized in a **segmentation**.

2 **Family Food** makes the heterogeneous market tangible with a **parent segmentation** and describes the various target groups with **clear and well-founded personas**.

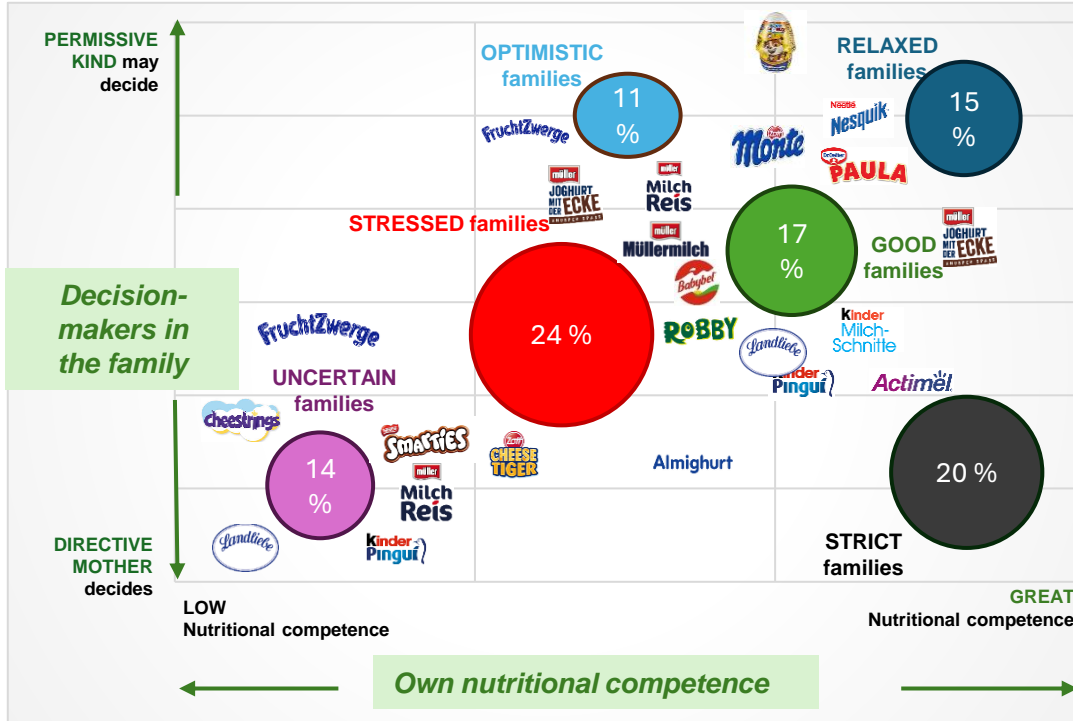



The relaxed parents (15%) - "Why should I stress myself any more?"

- Progressive, future-oriented and open to change.
- They are very knowledgeable about education and nutrition, but are generous and compromise-oriented.
- Their behavior is a mixture of directive action on the one hand and gut feeling on the other in areas where they respond to the child. So there are few arguments ...
- They are sure that the child is eating well. But there is also enough time - including for cooking - and eating is generally important.

Values, parenting styles and attitudes towards nutrition summarized in a **segmentation**.

2 **Family Food** makes the heterogeneous market tangible with a **parent segmentation** and describes the various target groups with **clear and well-founded personas**.

The relaxed parents (15%) - "Why should I stress myself any more?"

- Progressive, future-oriented and open to change.
- They are very knowledgeable about education and nutrition, but are generous and compromise-oriented.
- Their behavior is a mixture of directive action on the one hand and gut feeling on the other in areas where they respond to the child. So there are few arguments ...
- They are sure that the child is eating well. But there is also enough time - including for cooking - and eating is generally important.

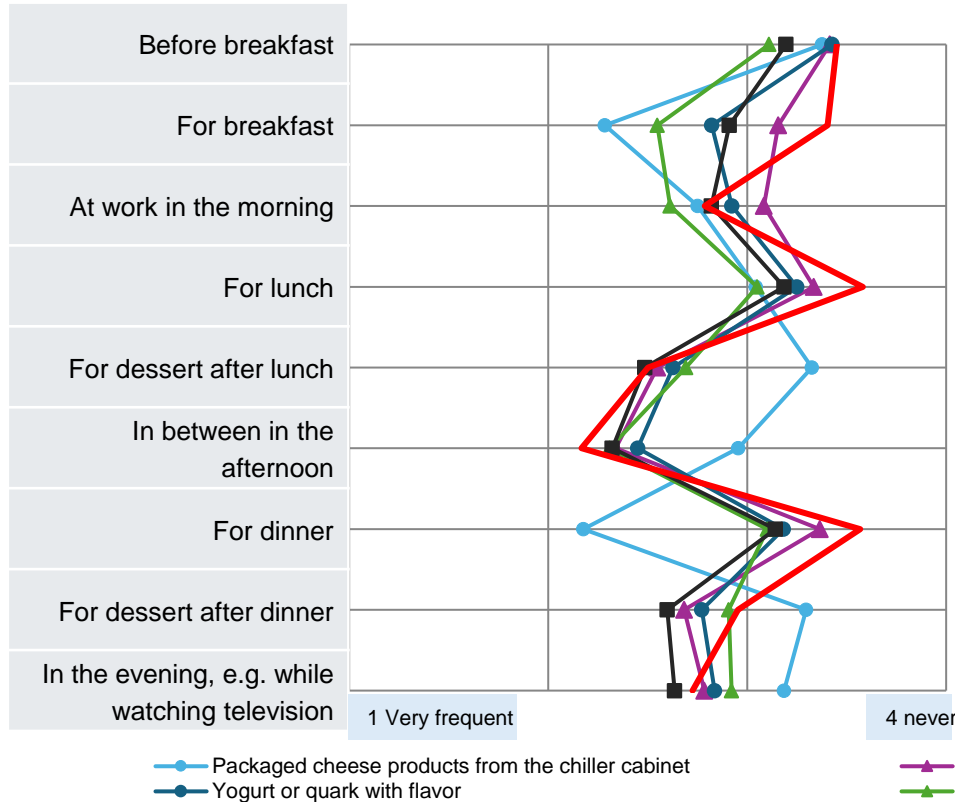
Your products are something very special.

***Diversity demands differentiation
and that is why we distinguish
between the individual
categories.***

***In the section on milk and
dessert products.***



1 **Family Food** shows you in which **situations** your category is **used** and which drivers are generally decisive in the usage situations.



Family Food shows **separately for the children and the adult users** in the household:

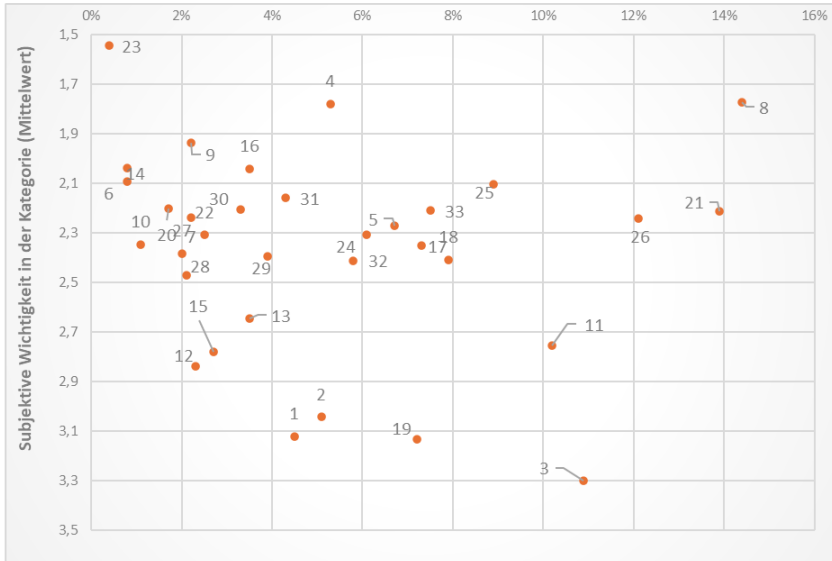
- ▶ Which usage situations are decisive for the **category**?
- ▶ What drives children's **product use** in these situations?
- ▶ Additionally **in the brand section** for the covered brands: **When exactly are the brands used?**

! Which other usage situations could you serve and how can you become relevant for these situations?

What really counts for parents.

2

Family Food compares what parents **subjectively perceive as important** and what is **really decisive for purchasing in reality**.



- 1 Mein Kind findet die Verpackung toll
- 2 Die Verpackung gefällt mir
- 3 Ist eine Belohnung
- 4 Hat eine hohe Qualität
- 5 Ist gut zum Aufteilen
- 6 Schmeckt der ganzen Familie
- 7 Ist gut für den kleinen Hunger
- 8 Hat ein gutes Preis-Leistungsverhältnis
- 9 Ist gesund
- 10 Ist oft im Sonderangebot
- 11 Ist aus der Region
- 12 Ist ein Bio-Produkt
- 13 Hat eine nachhaltige Verpackung
- 14 Das Produkt sieht lekker aus
- 15 Bietet viele Sorten / Geschmacksrichtungen zur Auswahl
- 16 Hat eine passende Portionsgröße
- 17 Hat eine lange Haltbarkeit
- 18 Schmeckt sehr intensiv
- 19 Hat eine gute Süße
- 20 Passt für viele Gelegenheiten
- 21 Enthält viele wichtige Nährstoffe oder Vitamine
- 22 Ist eine vertraute, bewährte Marke
- 23 Schmeckt meinem Kind richtig gut
- 24 Ist eine gute Kleinigkeit für zwischendurch
- 25 Ist natürlich
- 26 Gibt mir als Mutter / Vater ein gutes Gefühl
- 27 Mein Kind bittet mich, es zu kaufen
- 28 Kaufen wir schon immer, ist bewährt
- 29 Bietet Ess-Spaß
- 30 Für unterwegs geeignet
- 31 Ist ideal für Kinder
- 32 Der Nutriscore ist für ein Kinderprodukt in Ordnung
- 33 Hat eine praktische Verpackung

Family Food shows the reality of purchasing decisions:

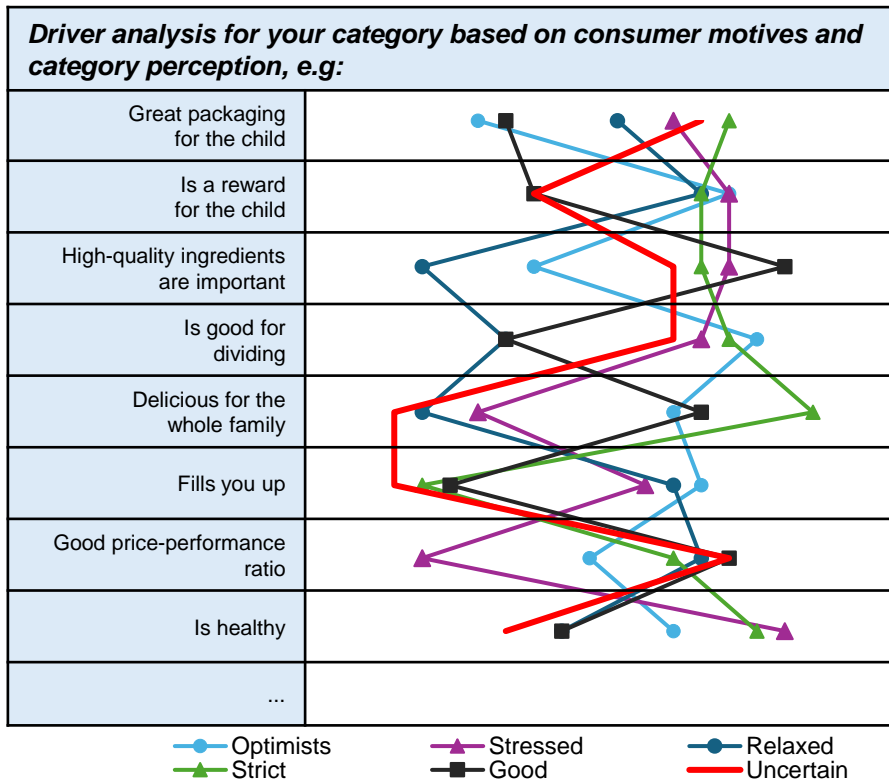
- ▶ What parents **subjectively** experience **as important** often plays **no role** in the purchase.
- ▶ Instead, **characteristics** that parents consciously or **unconsciously play down** are **important**.

Vertikale: B8 – Wichtigkeit beim Kauf für Kinder (Mittelwerte auf einer 5-stufigen Verbalskala). Vertikale: Lineare Regression der B8 mit S12 Kaufhäufigkeit im Haushalt als unabhängige Variablen B8 Wichtigkeit (Regressionskoeffizient in %)
 Filter: alle, die zu dieser Kategorie befragt wurden.

Check your brand messages: Are you addressing the really important things?

The values and motives of parents that determine purchasing decisions in a **driver analysis**.

3 **Family Food** shows for each parent segment which **values and motives** are **really decisive for purchasing** in your category.

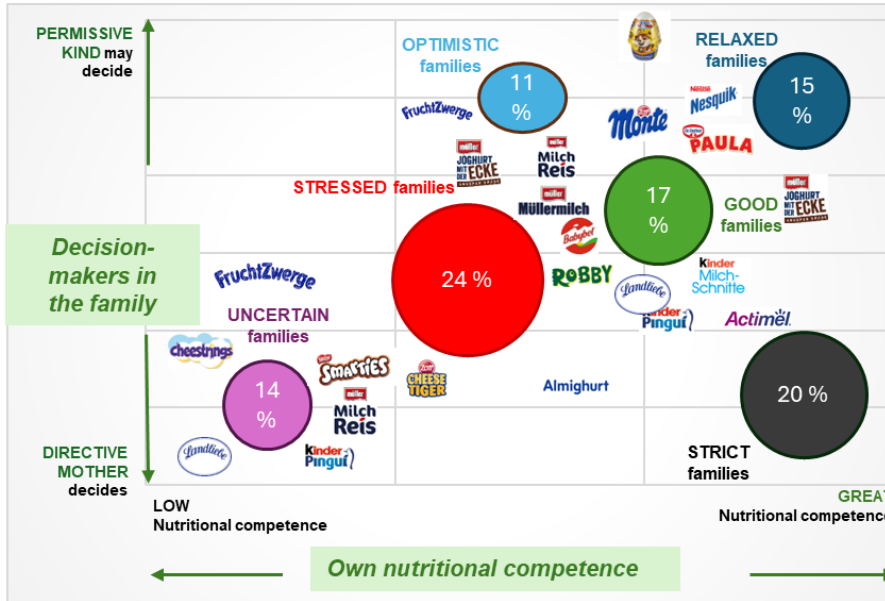


Family Food identifies the **purchase drivers** for **each category** and **each parent segment**, because:

- ▶ **Every family's diet is different.**
- ▶ **Each parent segment defines its own cosmos of values** in an individual way and has **different requirements** for products.
- ▶ **Each product category fulfills different functions** within the family and therefore follows **different drivers**.
- ▶ The **purchasing process** is different for each product category.

The positioning of selected brands* in the various categories.

4 **Family Food** shows which parent segments are close to which brands and which segments are currently not (yet) well served.



Family Food shows you:

- The correspondence of the relevant brands with the various buyer segments / personas in the German family market.
- Where are market-relevant niches that you could occupy with line extensions or new products?

! Important for your strategic brand positioning: Which parents are you currently targeting and how does the brand need to change in order to reach other segments?

* A detailed brand analysis is available for these brands.

3. The extension for the brands.

The use of brands is not by chance.

We show you how well your brand meets the needs meets the needs of families.



You want to know what makes your brand really strong?

And which of your brand attributes consumers may not even care about? don't care about at all?

Our driver analysis will show you.

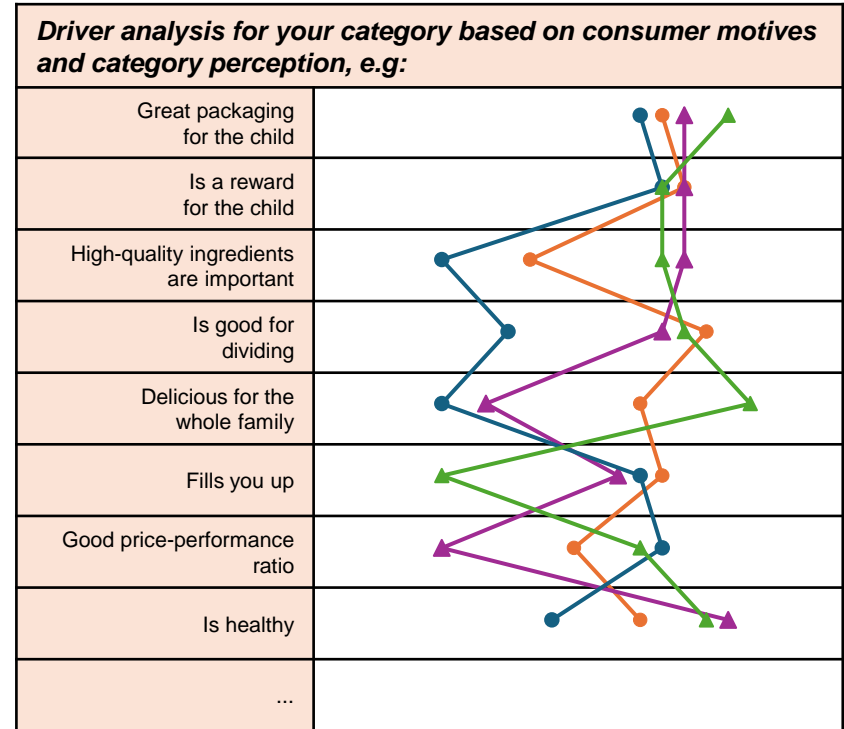


A close look at the **drivers of your brand**.

2 We analyze the **drivers of your brand and your two main competitors** and show you where you currently stand in the market.

Family Food identifies the **purchase drivers of your brand** and **compares them with the category drivers** and relevant competitors:

- ▶ Do you meet the **emotional needs** of families?
- ▶ Do you fulfill the **relevant functions** that are crucial in your category?
- ▶ Do you fit into the **purchasing process** in your product category?



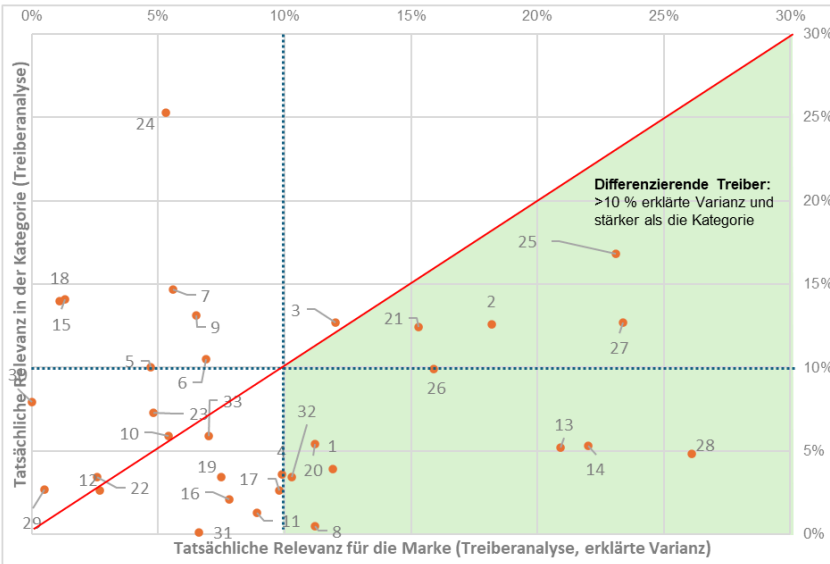
—○— Your brand
—●— Competitor B

—▲— Competitor A
—▲— Your category

Which drivers of your brand are actually **relevant to the market?**

3 **Family Food** shows which category drivers **your brand** serves and where the brand could be strengthened.

Treiber für den Kauf der Marke vs. Treiber der Kategorie



Horizontale: Treiberanalyse B8 für Joghurt und Quark mit Geschmack (siehe Kategorie-Teil). Vertikale: Treiberanalyse der Marke (Lineare Regression der M16 mit M7 Kaufwahrscheinlichkeit der Marke als abhängige Variable, Regressionskoeffizient in %). Filter: alle Kenner und Verwender mind. Einmal im Monat) der Marke.

- 1 Mein Kind findet die Verpackung toll
- 2 Die Verpackung gefällt mir
- 3 Ist eine Belohnung
- 4 Hat eine hohe Qualität
- 5 Ist gut zum Aufteilen
- 6 Schmeckt der ganzen Familie
- 7 Ist gut für den kleinen Hunger
- 8 Hat ein gutes Preis-Leistungsverhältnis
- 9 Ist gesund
- 10 Ist oft im Sonderangebot
- 11 Ist aus der Region
- 12 Ist ein Bio-Produkt
- 13 Hat eine nachhaltige Verpackung
- 14 Das Produkt sieht lecker aus
- 15 Bietet viele Sorten-/Geschmacksrichtungen zur Auswahl
- 16 Hat eine passende Portionsgröße
- 17 Hat eine lange Haltbarkeit
- 18 Schmeckt sehr intensiv
- 19 Hat eine gute Süße
- 20 Passt für viele Gelegenheiten
- 21 Enthält viele wichtige Nährstoffe oder Vitamine
- 22 Ist eine vertraute, bewährte Marke
- 23 Schmeckt meinem Kind richtig gut
- 24 Ist eine gute Kleinigkeit für zwischendurch
- 25 Ist natürlich
- 26 Gibt mir als Mutter/ Vater ein gutes Gefühl
- 27 Mein Kind bittet mich, es zu kaufen
- 28 Kaufen wir schon immer, ist bewährt
- 29 Bietet Ent-Spaß
- 30 Für unterwegs geeignet
- 31 Ist ideal für Kinder
- 32 Der Nährscore ist für ein Kinderprodukt in Ordnung
- 33 Hat eine praktische Verpackung

Vertical: Category driver
What is really important for the use of the category?

Horizontal: Strength of the brand
How does your brand / product perform with these drivers?

Important for your initiatives:
How can you improve the performance of your brand to become even more relevant?

FAMILY FOOD

The details of the study



This is *family food*: the key points of the study.

Method and sample: online survey of n = 750 parents of 4 to 12-year-olds in Germany (85% mothers, 15% fathers according to the distribution in the population); otherwise online-representative sample

Food categories:

(two categories per interview with n = 250 parents each)

- Cheese products from the chiller cabinet
- Desserts to spoon from the chiller cabinet
- Dairy products with flavor for spooning
- Flavored milk products for drinking
- Milk-based snacks and bars from the chiller cabinet
- Dual-chamber dairy products

1. Contents of the foundational study:

- **Consumption motives and attitudes** (*all respondents*): Measured with statements; in the analysis **condensed into consumer segments** with personas derived from them
- **Per category:**
 - **Category use:** Brand (open question), users in the household, purchase frequency, purchase decision-makers, occasions of use
 - **Drivers of the category in the family:** Consumption motives and category perception with statements (see above)

2. Optional: Brand analysis

Only available for selected brands; support of the brand with logo and product image.

- **KPIs:** Awareness, popularity, purchase frequency, purchase interest
- **Driver analysis** based on relevant product dimensions
- In the analysis: **Positioning** of the brand in the market segmentation

Costs and timing

Costs:

Basic study Family Food: € 5.900,--

*Includes PowerPoint report with **parent segmentation** (n = 752), **category and brand usage** and **driver analysis** for each of the six categories (approx. n = 250 each)*

Report for your brand € 3.800,--

Costs per brand incl. 2 competitors in the category.

Only in combination with the basic study.

Includes query of the KPIs, integration into the family segmentation as well as individual driver analysis for the main parent segments

The copyright of the study remains with iconkids & youth. The dissemination or publication of results (including excerpts) is only possible in consultation with and with the permission of iconkids & youth.

All costs are exclusive of VAT. The order amount is due when the order is placed. All invoiced amounts are payable within 10 days without any deductions. The General Terms and Conditions of iconkids & youth international research GmbH apply. These terms and conditions may only be amended with the consent of iconkids & youth.



Your contact persons



Axel Dammler



+49 89 544629 - 33



a.dammler@iconkids.com



Rückertstraße 4, 80336 Munich



Nilufar Amberger



+49 89 544629 - 25



n.amberger@iconkids.com



Rückertstraße 4, 80336 Munich

iconkids & youth international research GmbH

Rückertstraße 4 80336 Munich

info@iconkids.com

www.iconkids.com