

Continental PERIscope

European Consumers and their Food

Understanding attitudes in France

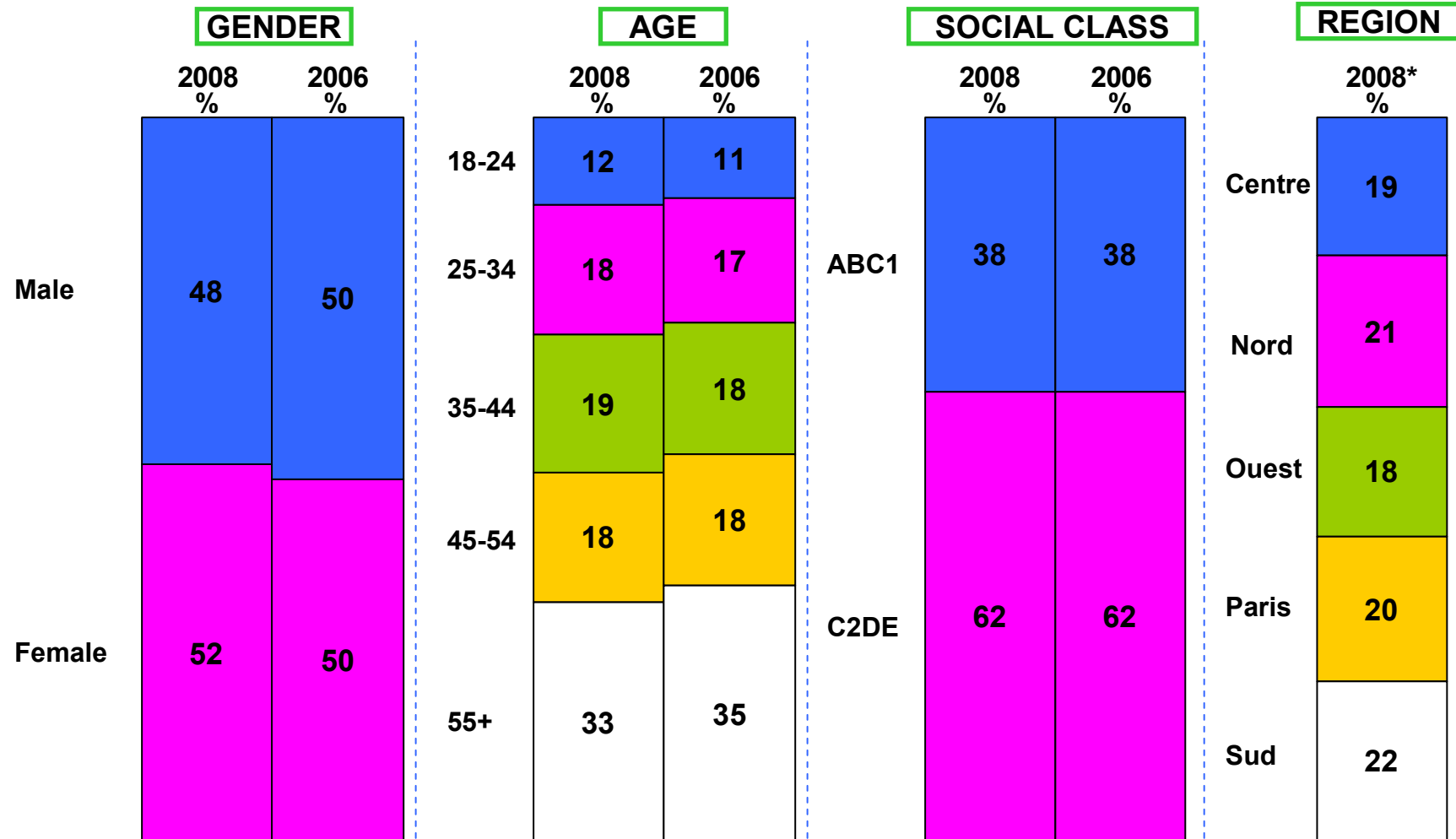


SECTION 1: Profile of Sample



Profile of sample – France

(Base: All Adults 18+ - France)



Nationally representative population of France

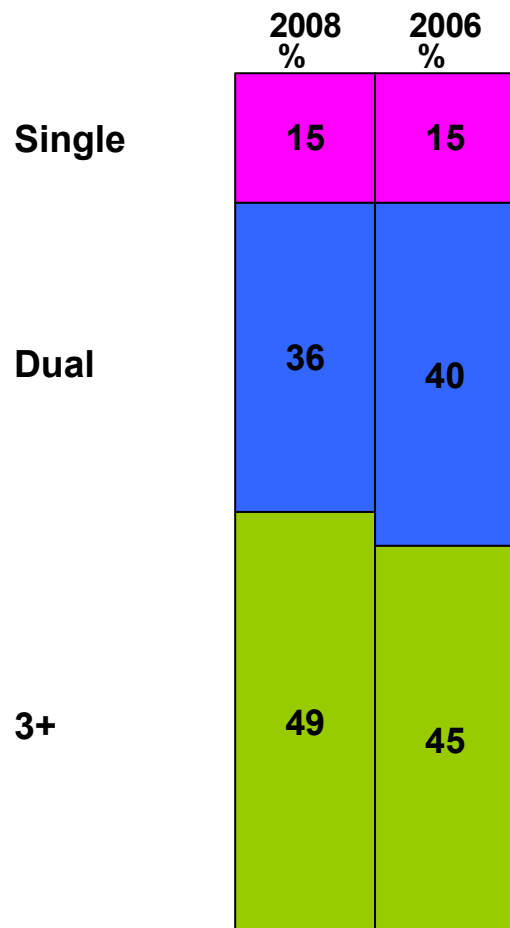


* Geographic breakout of regions different for Nord and Est regions between 2006/2008.

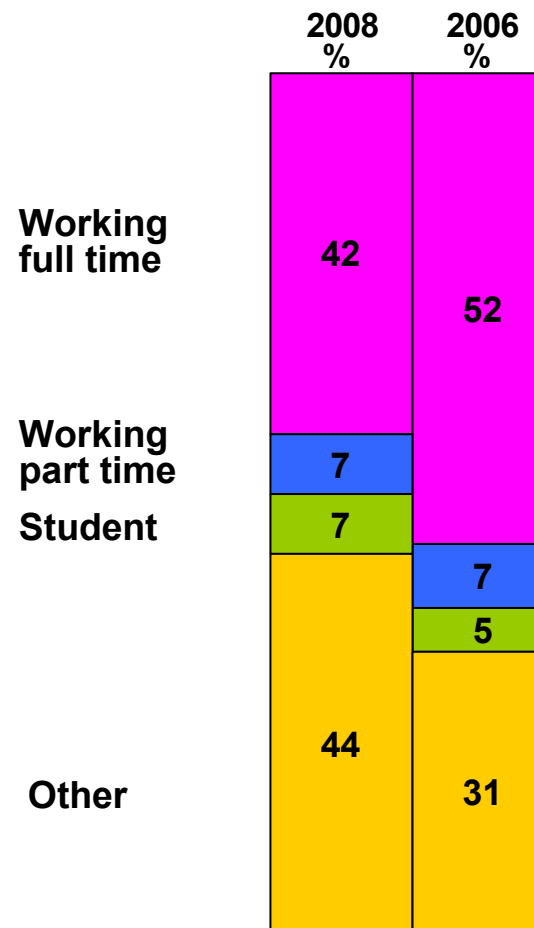
Profile of sample –household composition and work status

(Base: All Adults 18+ - France)

HOUSEHOLD COMPOSITION



WORK STATUS



* Other includes housewife, retired, unemployed

SECTION 2: Food & Cooking



Attitudes to food & cooking summary points

- ◆ **French consumers have a healthy attitude towards food.**
 - Fruit and vegetables, dairy food and meat are all seen as important to their diet.
 - They are interested in new foods and low fat foods.
 - Spending time with the family over dinner is also important.

- ◆ **There have been some notable shifts in attitude since 2006:**
 - Ready meals and prepared deli foods have become more popular especially among the younger age groups (18-44 years).
 - More French are adding sauces and dressings to their food.

- ◆ **Time pressure is having an impact on French cooking habits.**
 - Cooking is a little less enjoyable and more of a chore – eating well is important and perhaps this has taken some of the fun out of cooking.
 - Dinner is often a last minute choice and French cooks are preparing fewer meals from scratch and are turning to convenience meals as an alternative when time is short.
 - Foods that are quick to cook and prepare are more popular.
 - Meals components are being used less often, with convenience meals perhaps been used instead.
 - Young French consumers are less likely to have good cooking skills are more likely to look use meal components and convenience meals.



Attitude to food & cooking summary points

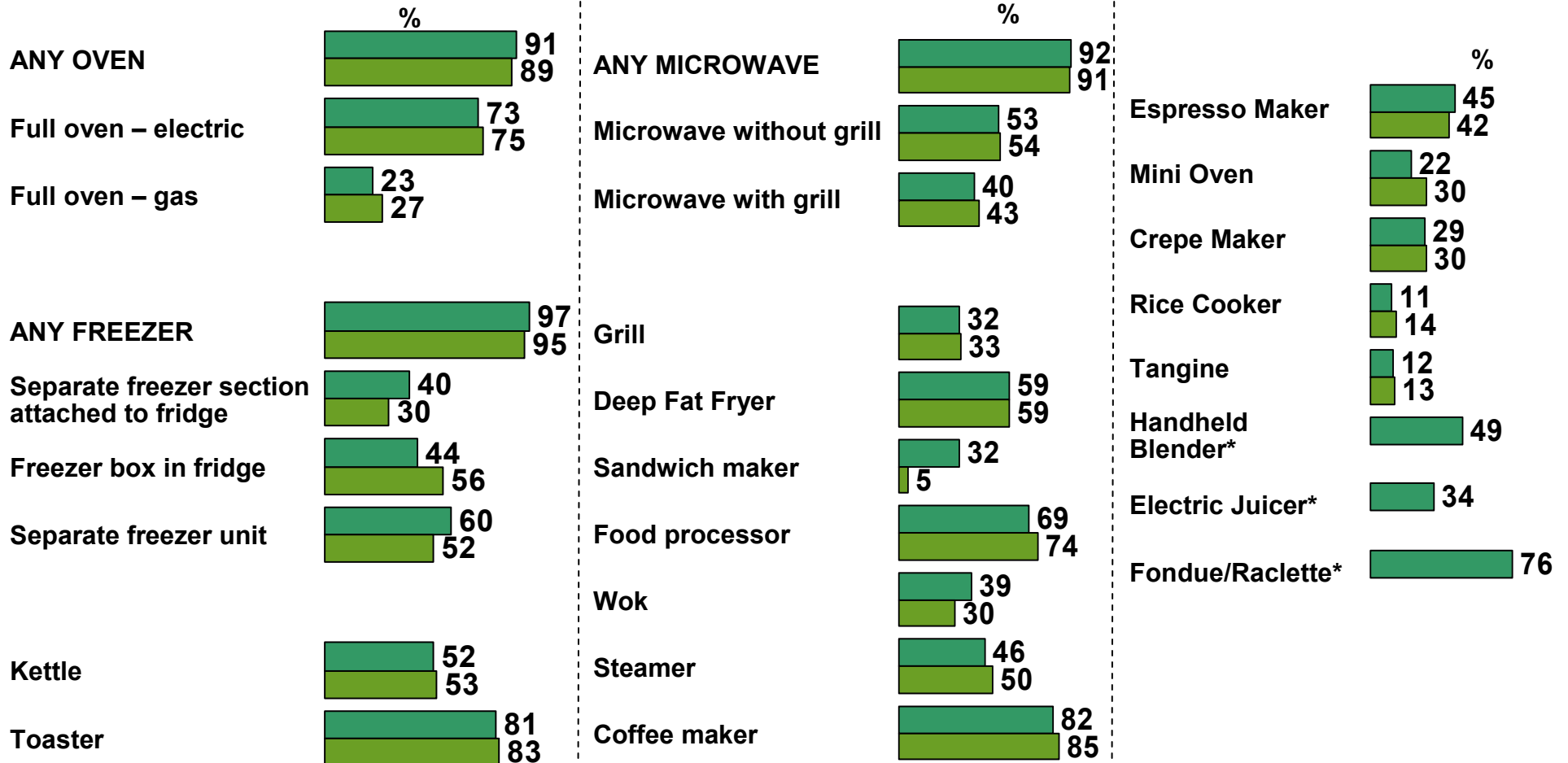
- ◆ **There is a mixed opinion of convenience meals**
 - They are easy to cook and prepare, and are time saving
 - However, they are expensive, lack taste and are not seen as being healthy.
 - Fresh ready meals are seen as superior to frozen on aspects of taste, quality and healthiness.



Utility ownership in home

UTILITY OWNERSHIP IN HOME

(Base: All Adults 18+ - France)

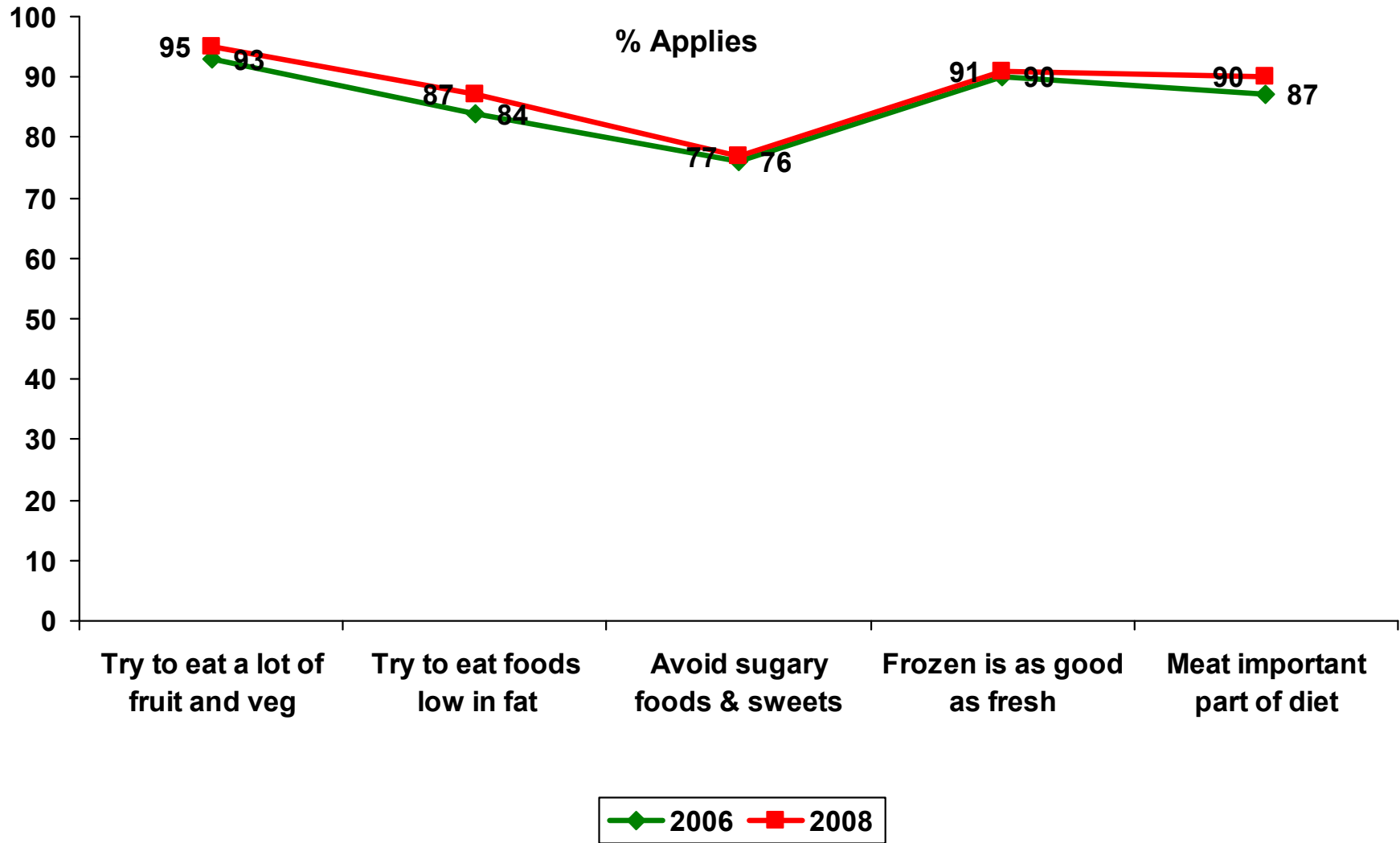


Utility ownership has remained consistent with 2006 levels, with the exception of sandwich makers which are now owned by one third of respondents.

 * New question added 2008

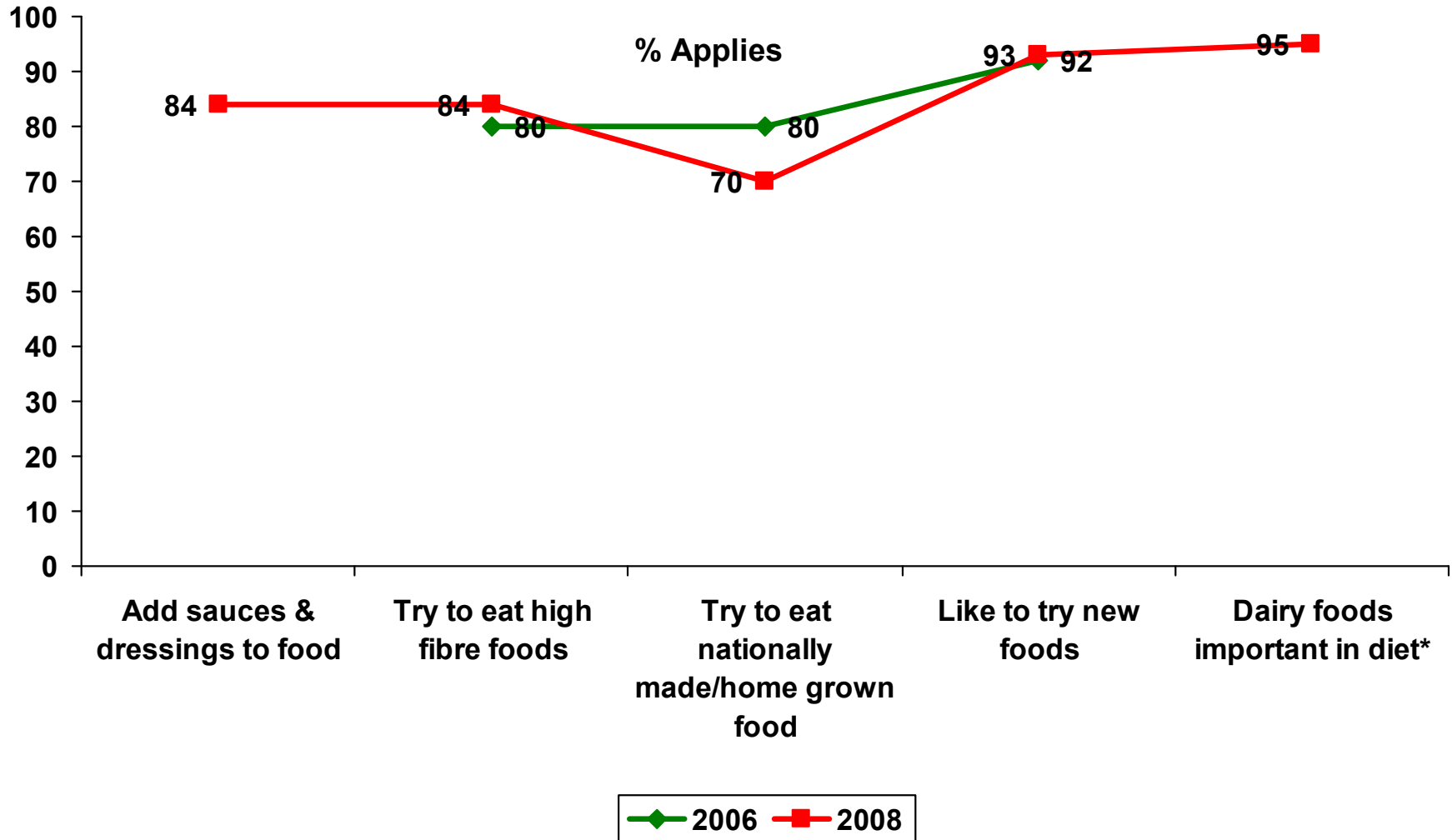
Healthy eating attitude unchanged

(Base: All Adults 18+ - France)



Home grown / national food growing in importance

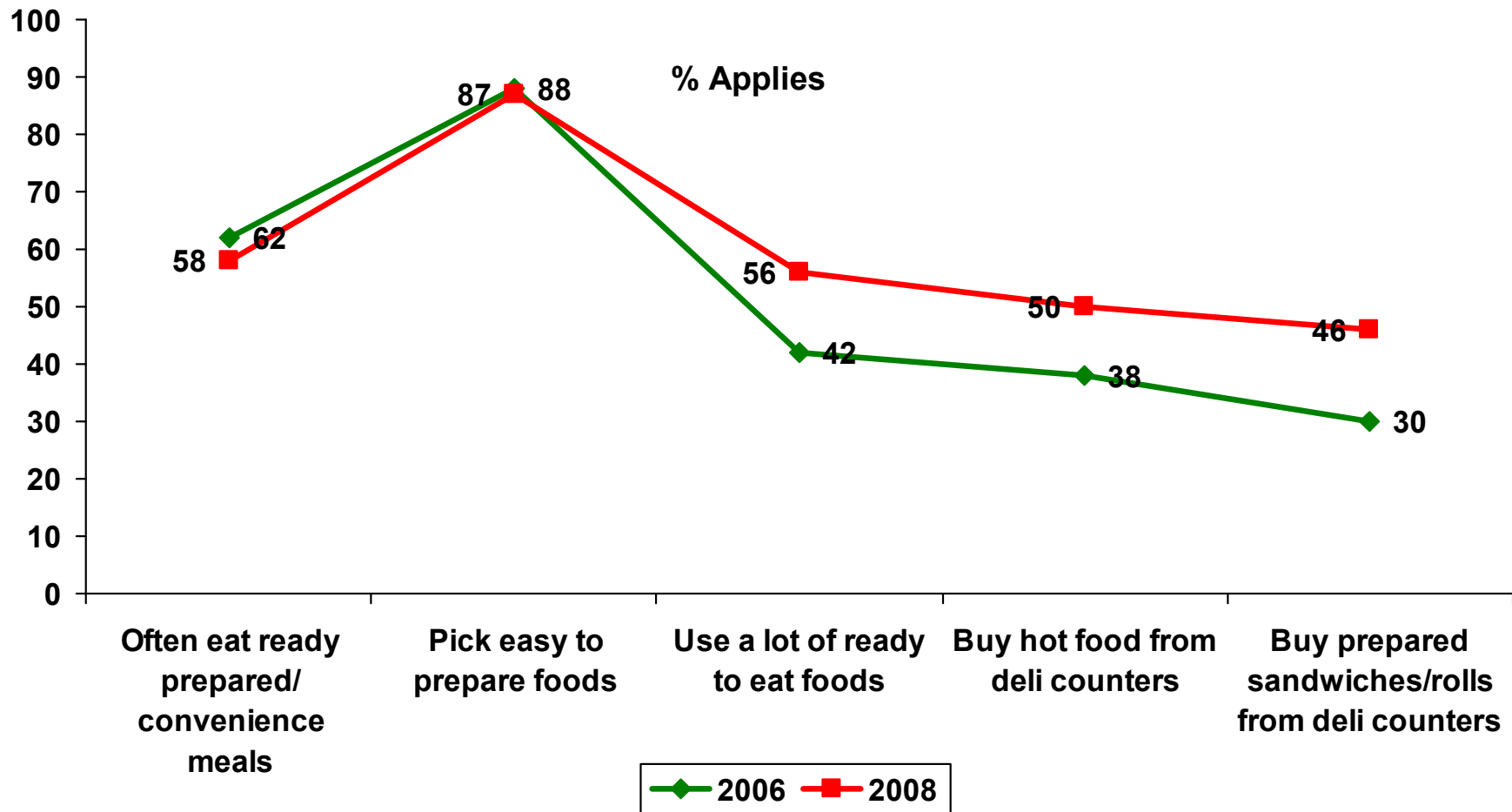
(Base: All Adults 18+ - France)



 *New attribute added 2008

Increased appeal of ready to eat food

(Base: All Adults 18+ - France)

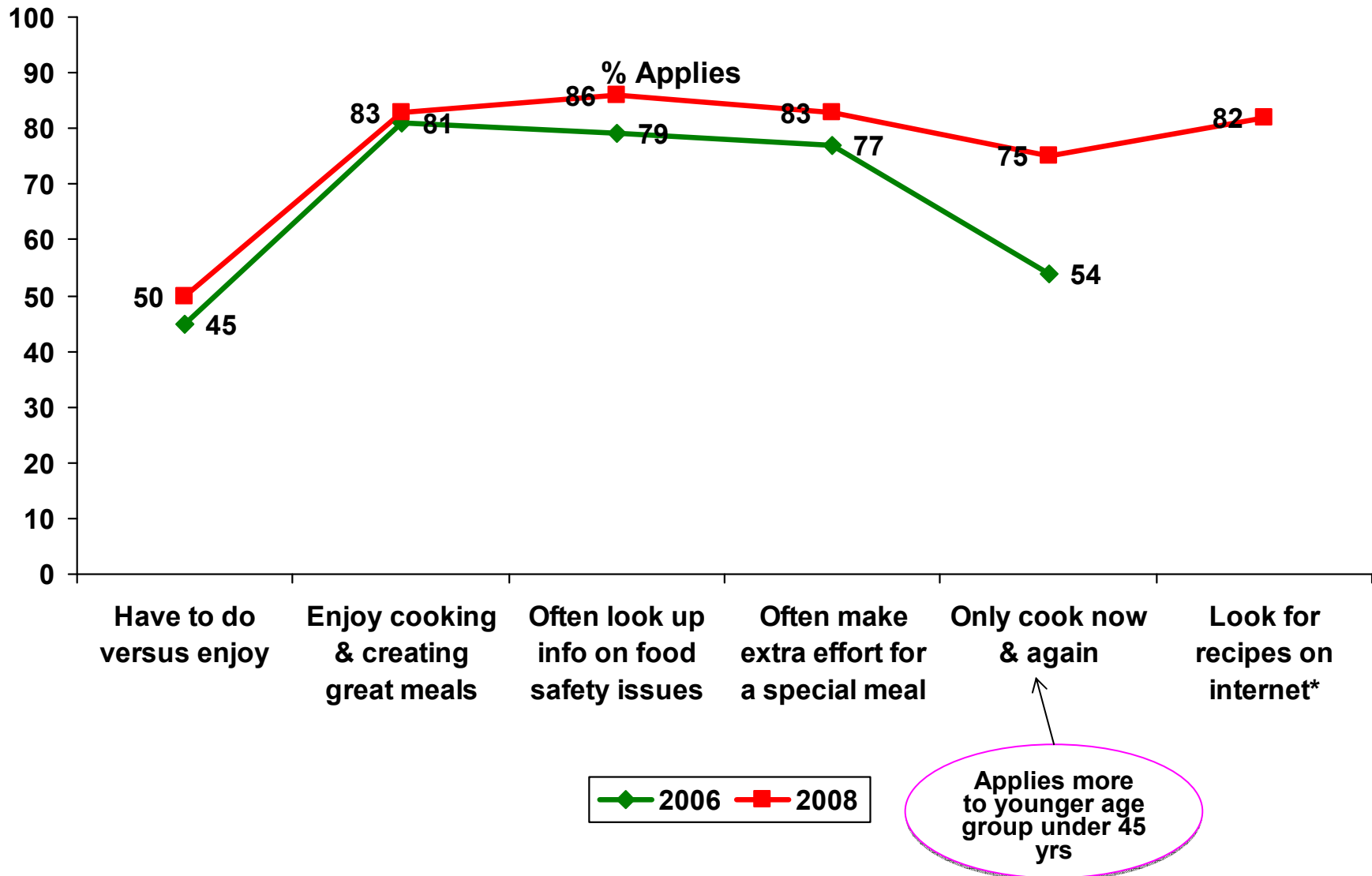


Ready meals and prepared deli food are becoming more popular – especially among those under 45 years.



Enjoy cooking but frequency declining

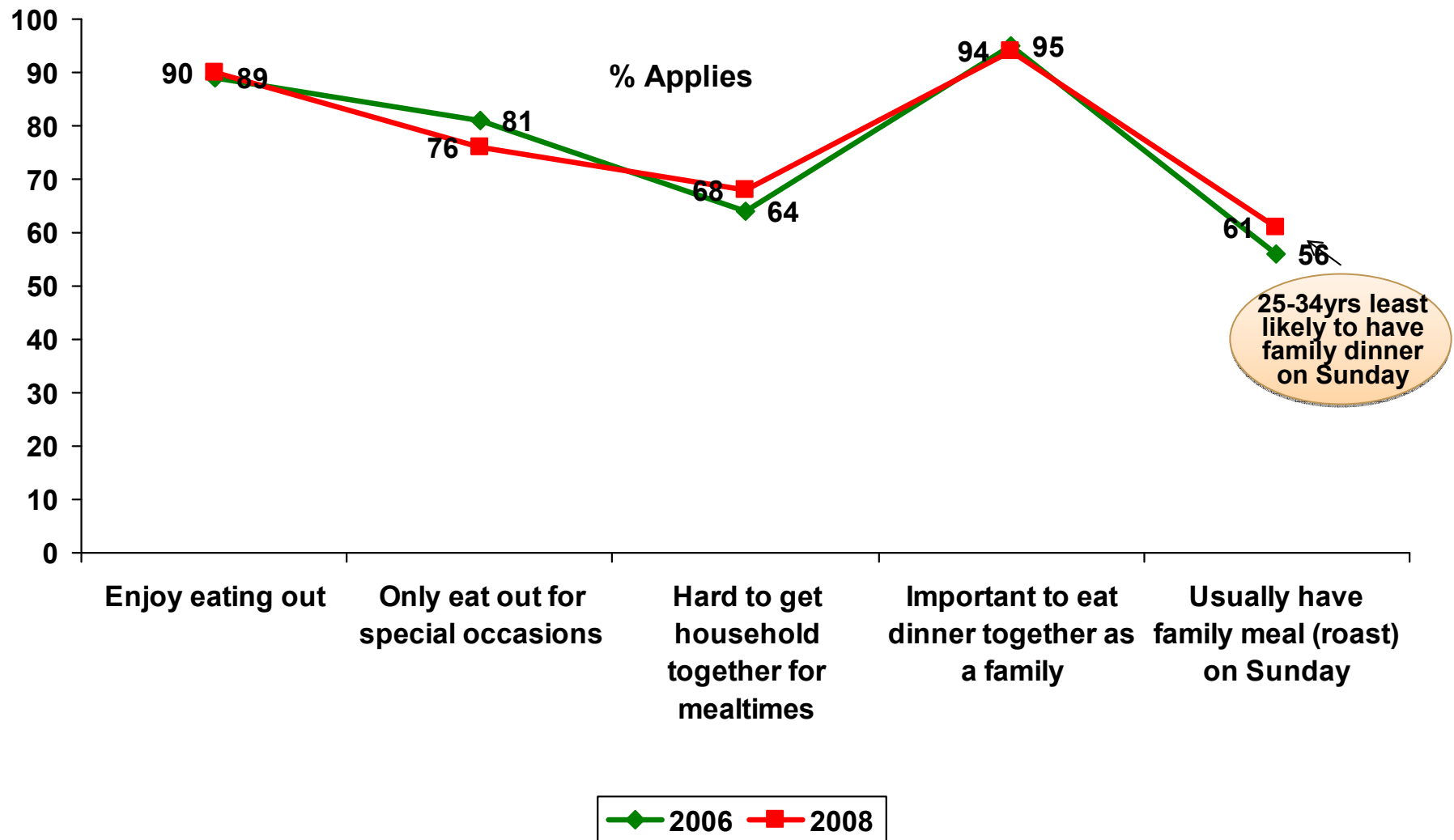
(Base: All Adults 18+ - France)



*New attribute added 2008

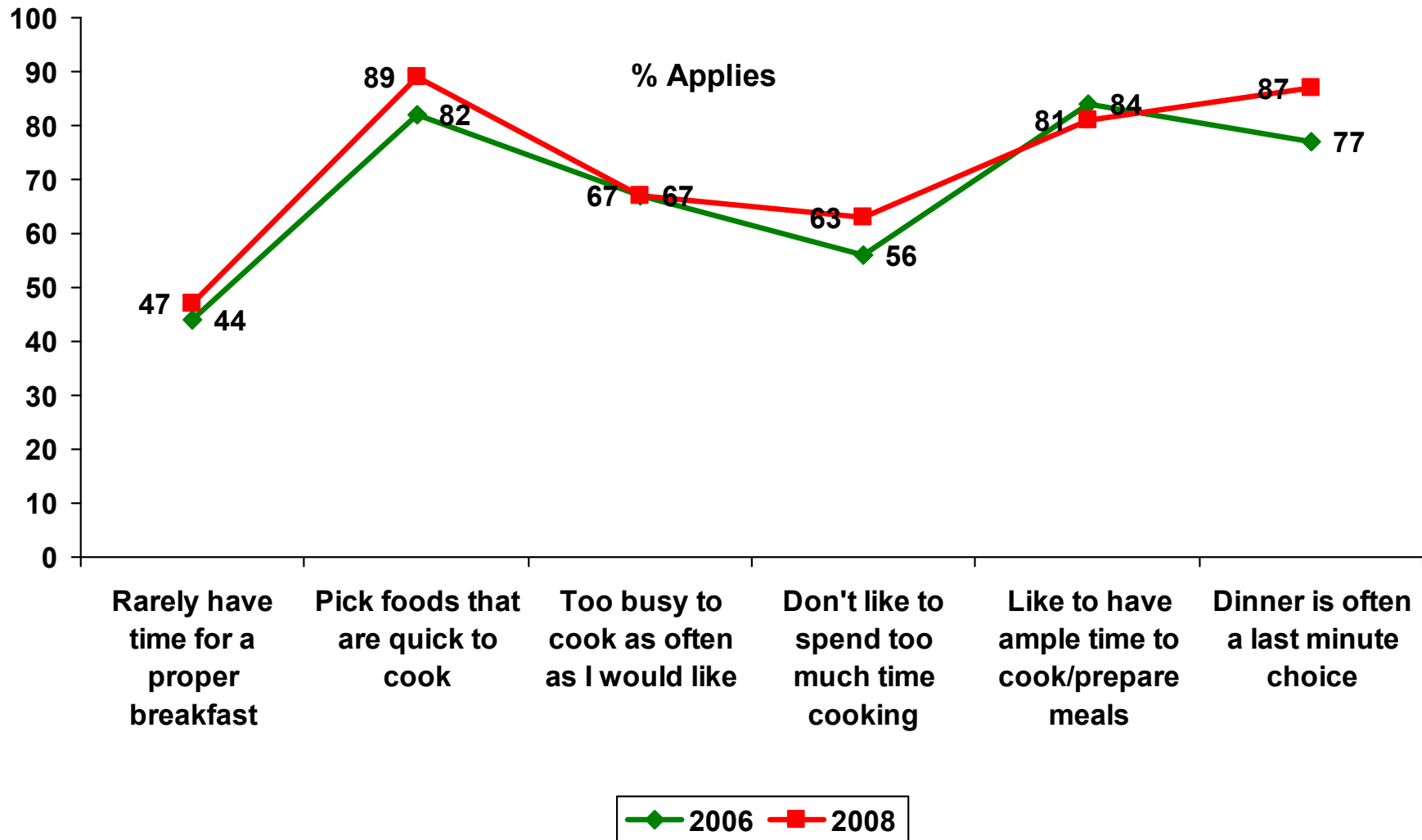
Difficult to gather family for meal times

(Base: All Adults 18+ - France)



Time pressure more evident

(Base: All Adults 18+ - France)



Fruit and veg and dairy important

(Base: All Adults 18+ - France)

% Applies



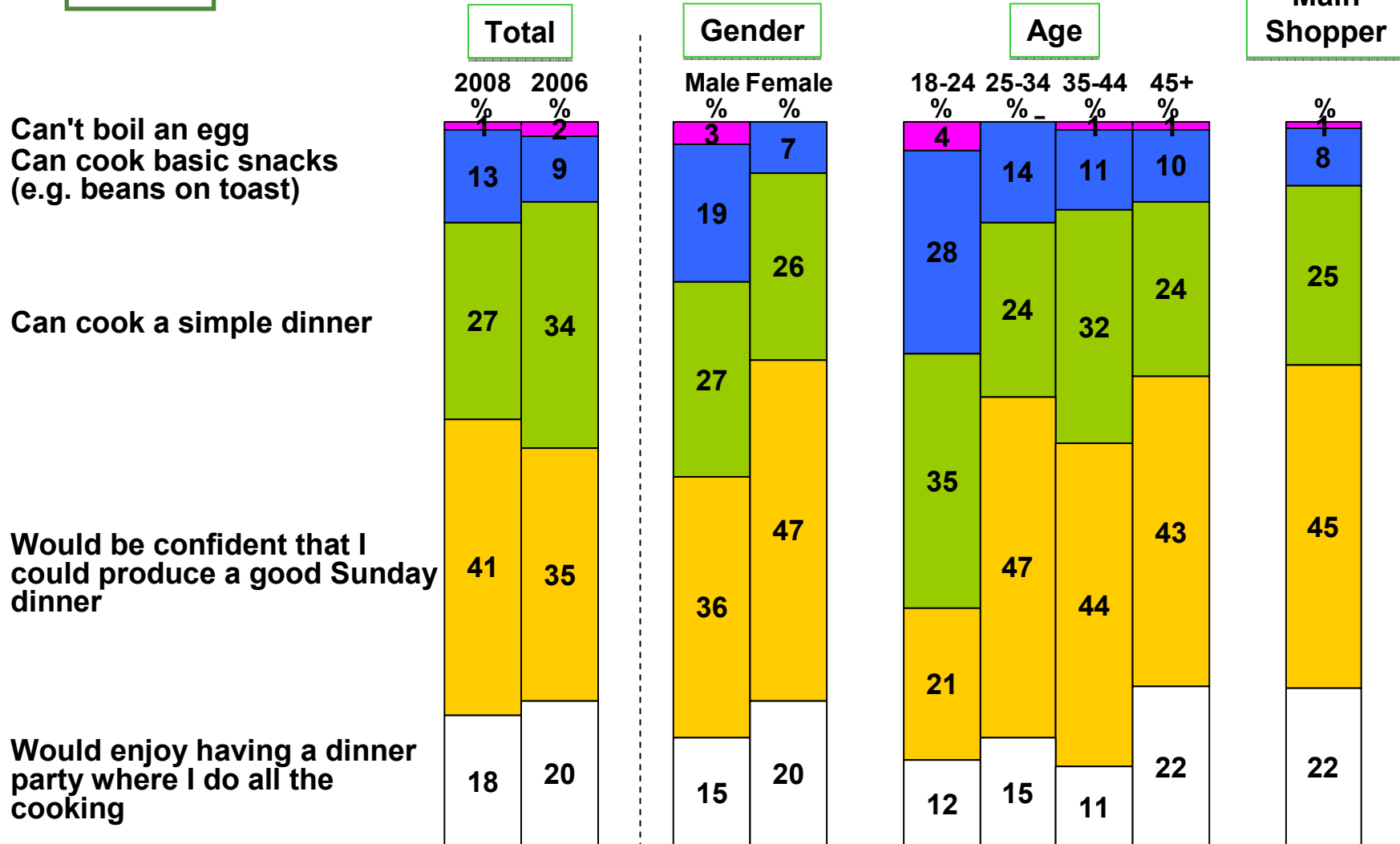
Females and the older age groups (45+ yrs) are more likely to feel that fruit and vegetables, as well as low fat foods are important to their diet. Males and the younger age groups favour meat as important to their diet.



No change in cooking skills

2008

(Base: All Adults 18+ - France)



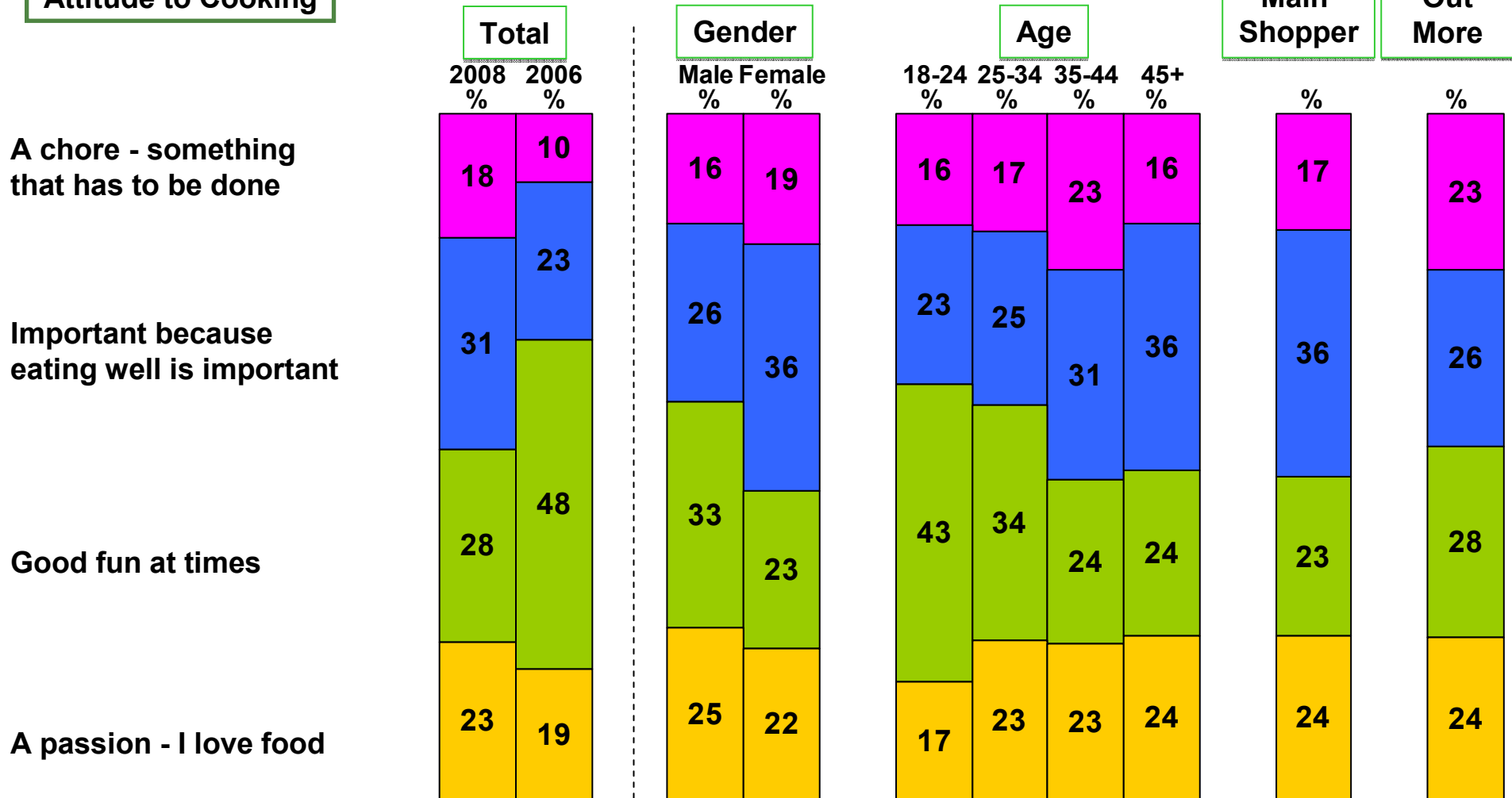
18-24 and males have weaker cooking skills.



But cooking less fun

(Base: All Adults 18+ - France)

Attitude to Cooking



Cooking has taken on more importance due to diet/health concerns but is more likely to be seen as a chore.



Decline in preparing meals from scratch daily

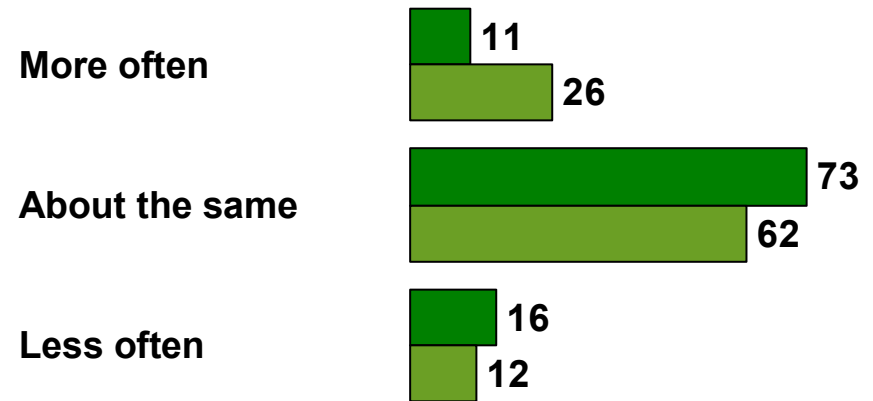
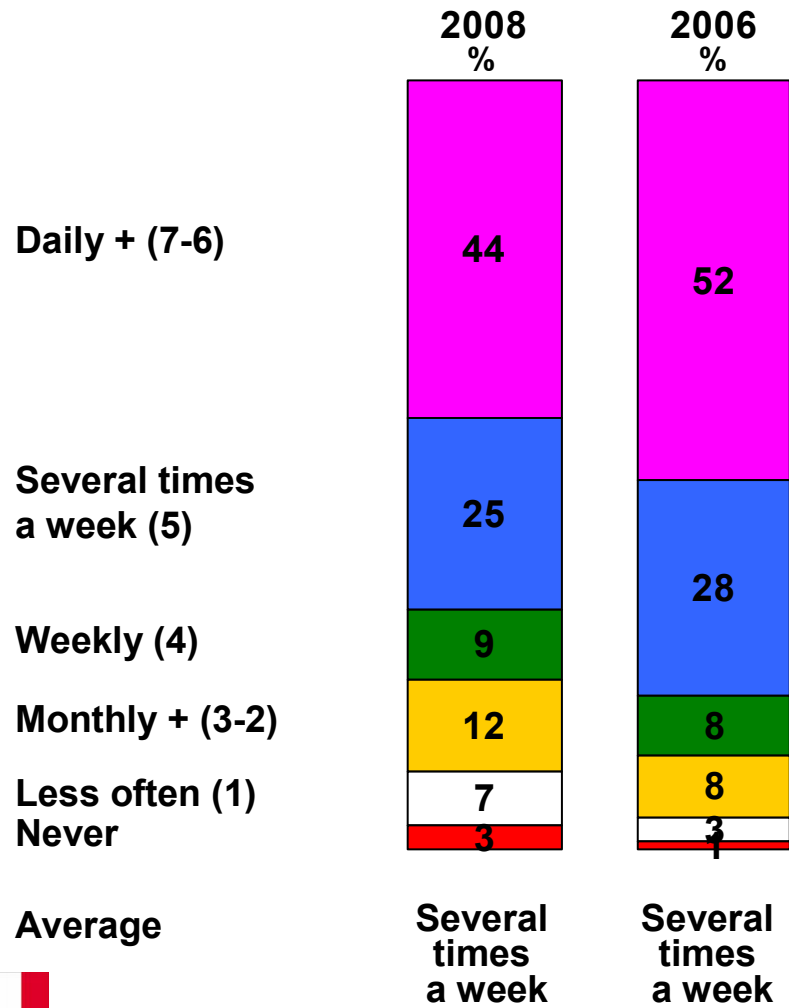
(Base: All Adults 18+ - France)

2008
2006

Frequency of Preparing/Cooking Meals from Scratch

Frequency

Change in Frequency

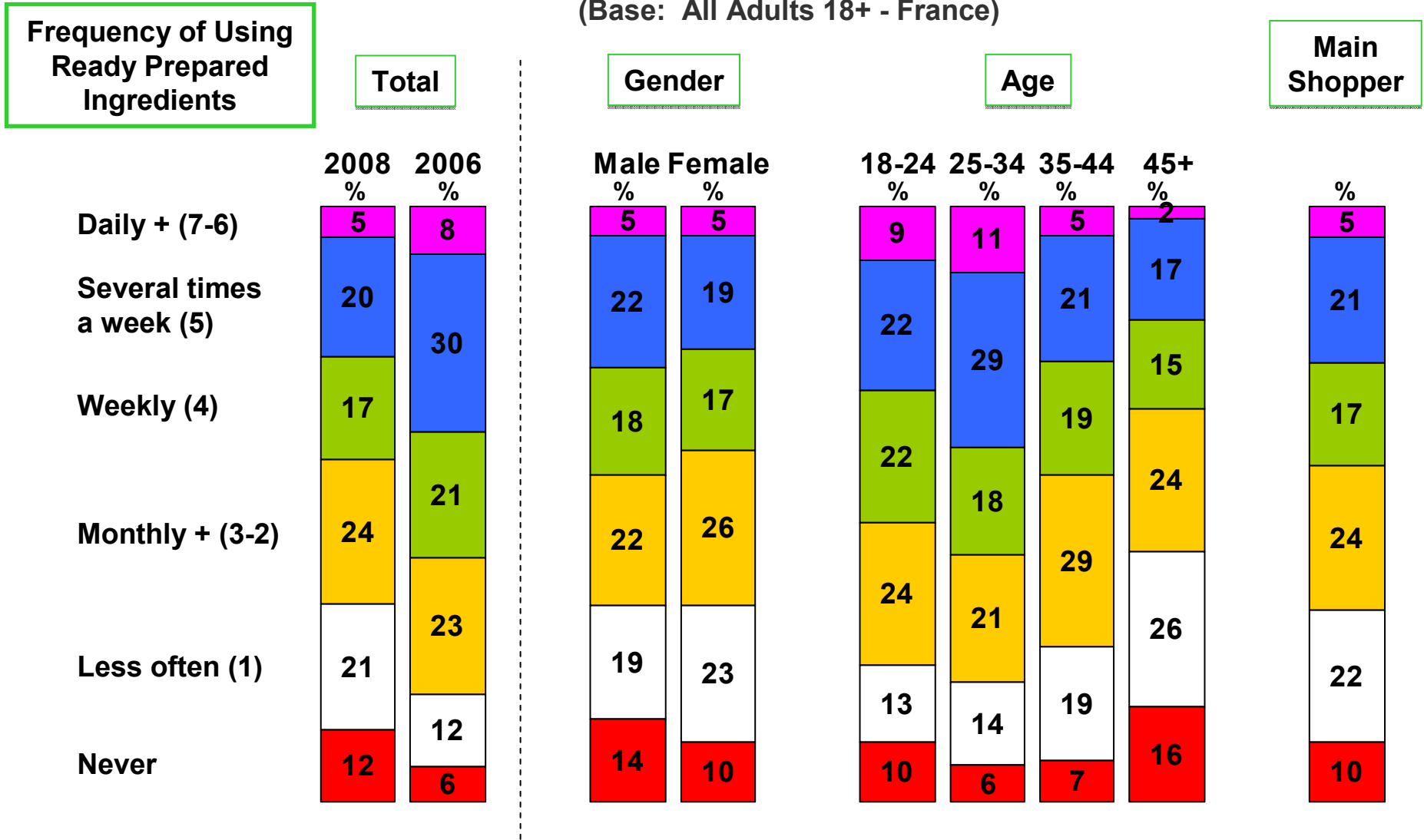


40% of 18-24 year olds are preparing meals from scratch less often versus last year.



Younger more likely to use meal components

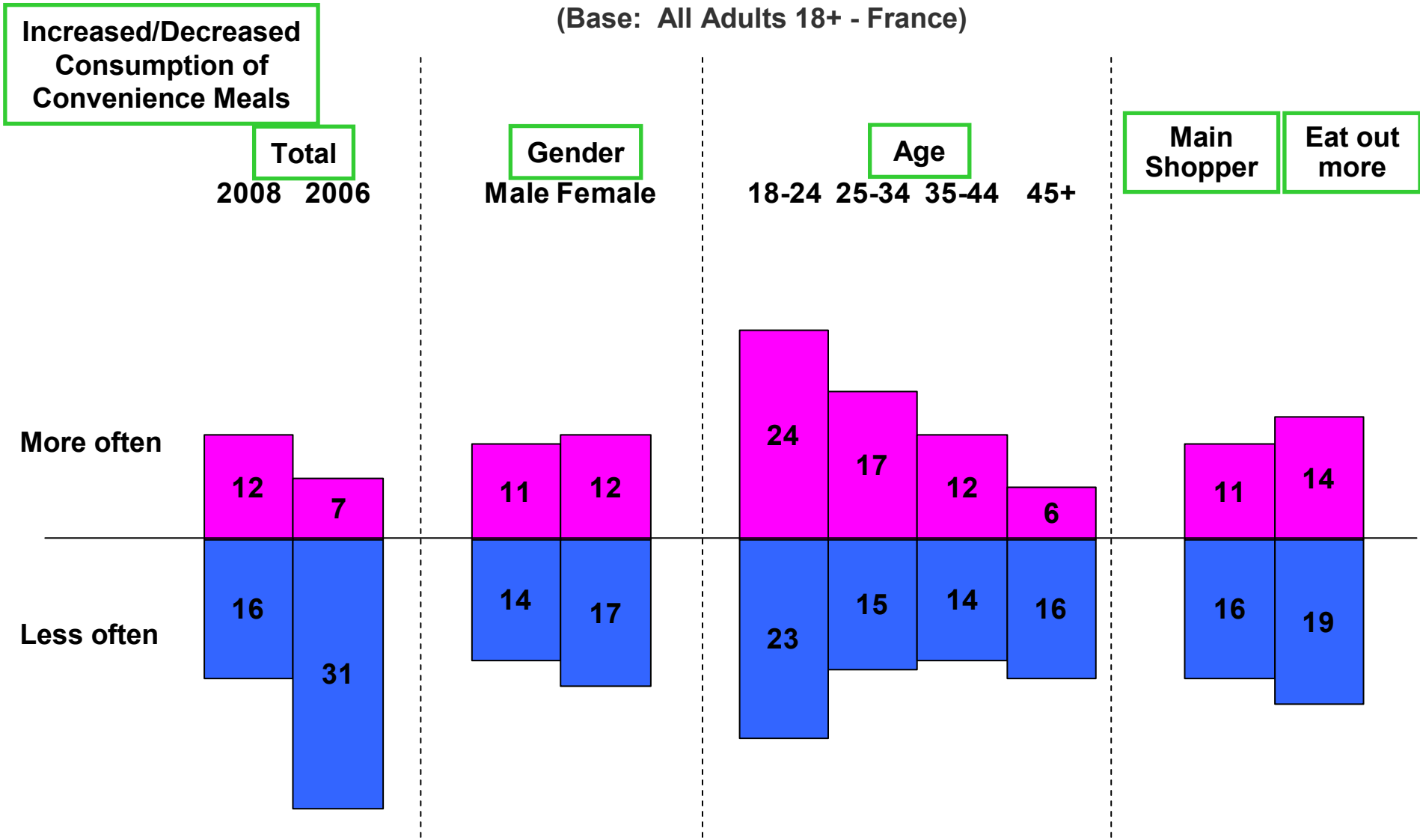
(Base: All Adults 18+ - France)



Decrease in the frequency of using ready made ingredients. However younger consumers (under 45 yrs) are using meals components more frequently.



More consumers using ready meals less often

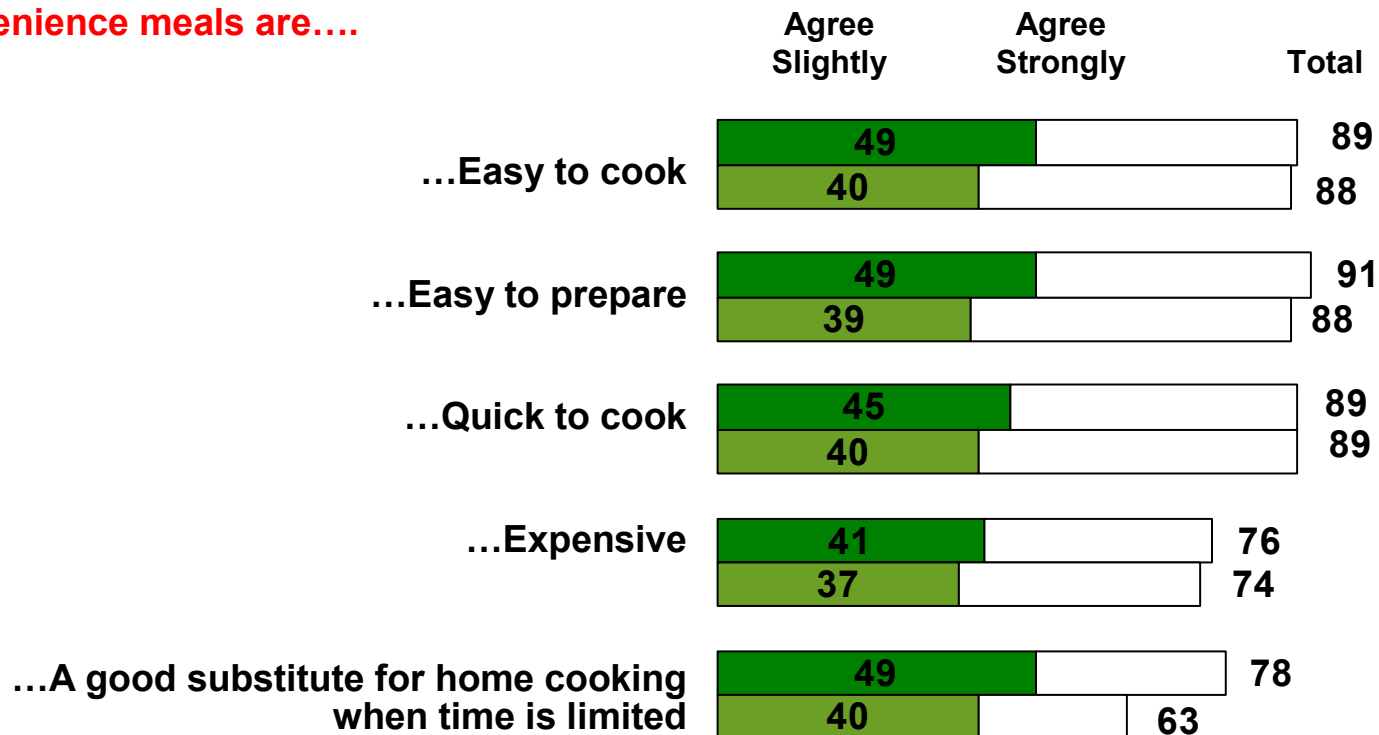


Convenience meals continue to offer advantages when time is limited

(Base: All Adults 18+ - France)

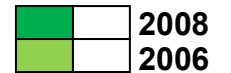


Convenience meals are....

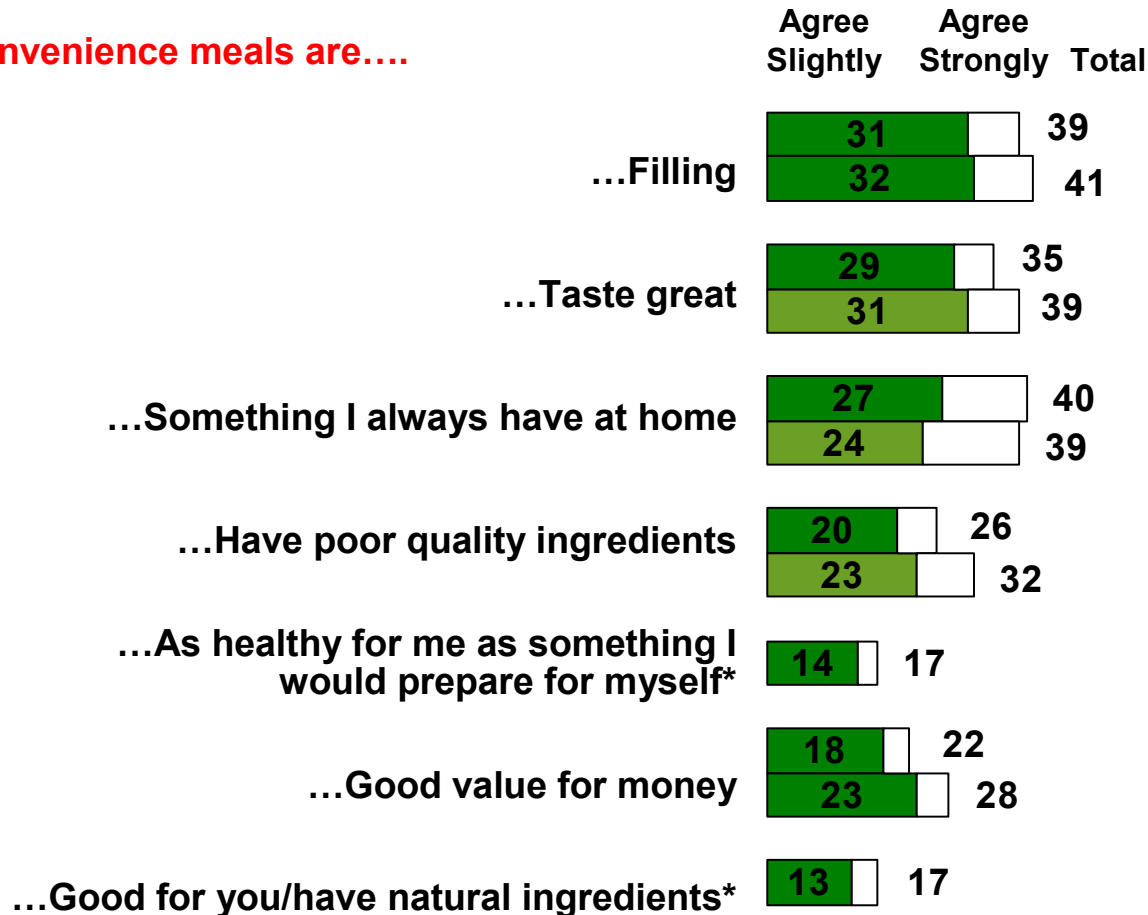


But taste and value for money declined

(Base: All Adults 18+ - France)



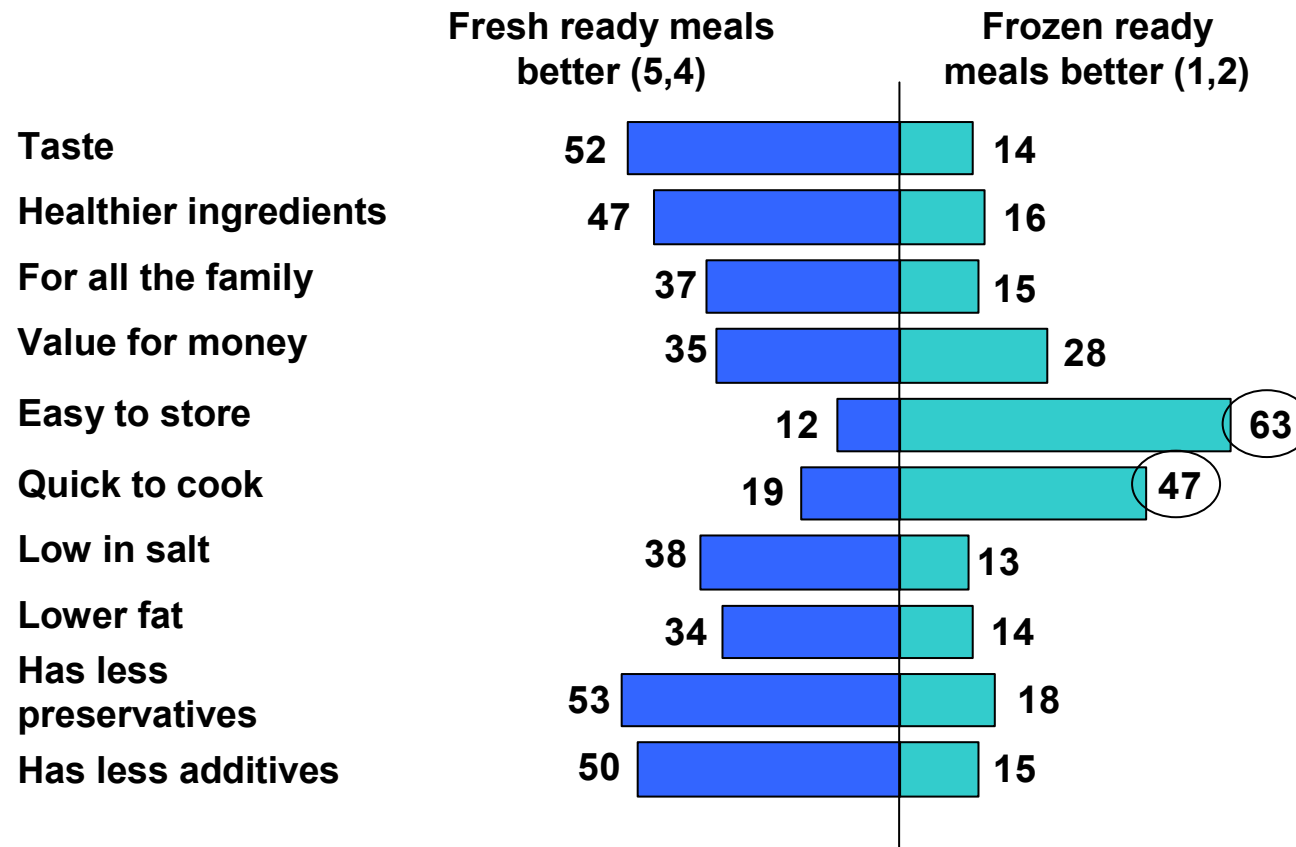
Convenience meals are....



Attitudes to convenience meals are similar across age and gender, however the younger age group (under 45 yrs) are more likely to regard convenience meals as easier/quicker to cook and prepare.



Fresh wins over frozen for ready meals



SECTION 2: Eating In Home



Eating in home summary points

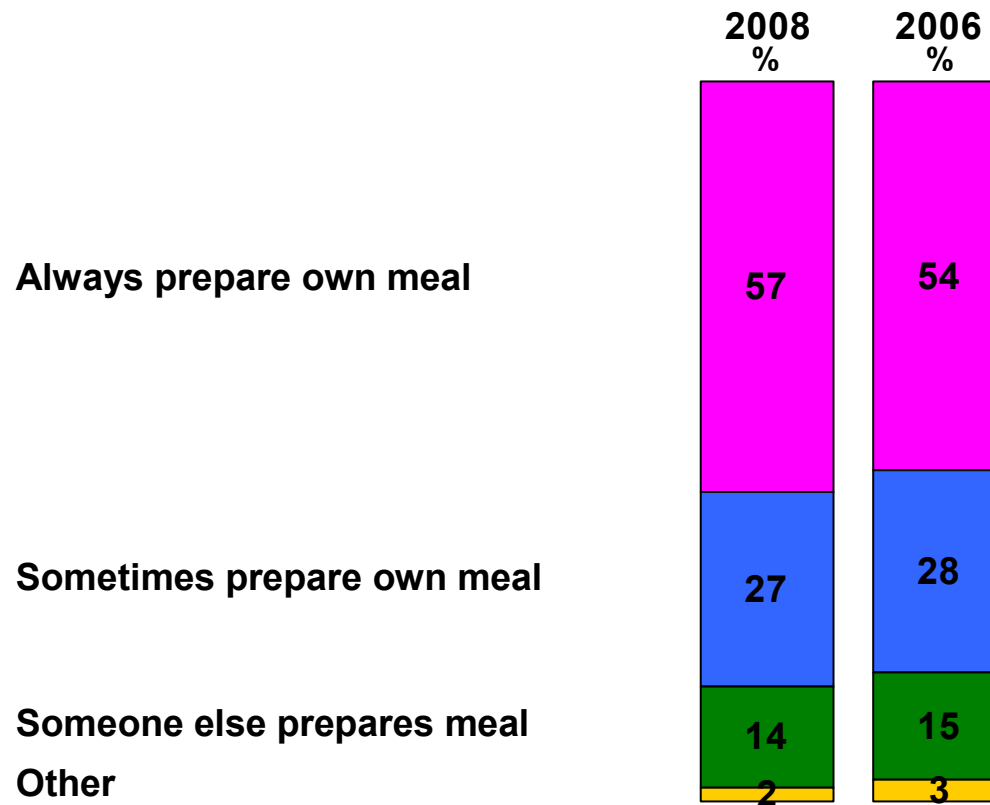
- ◆ **Responsibility for cooking/preparing food in the home generally rests with females aged 35+ years.**
- ◆ **The French use a variety of cooking methods when preparing food but the most popular are also the methods considered the best for your health:**
 - **Stir-fry (rated #3 for healthiness)**
 - **Steamed (rated #1 for healthiness)**
 - **Uncooked/cold (rated #2 for healthiness)**
 - **Baked/roasted (rated #4 for healthiness)**
- ◆ **Taste, quality and enjoyment and ranked as the top three factors considered important when eating or preparing food in the home.**
 - **Safeness, ease of preparation and nutritional value are all of lesser importance to the French when compared with taste.**



Responsibility for meal preparation consistent

**Responsibility for
Meal Preparation
in the Home**

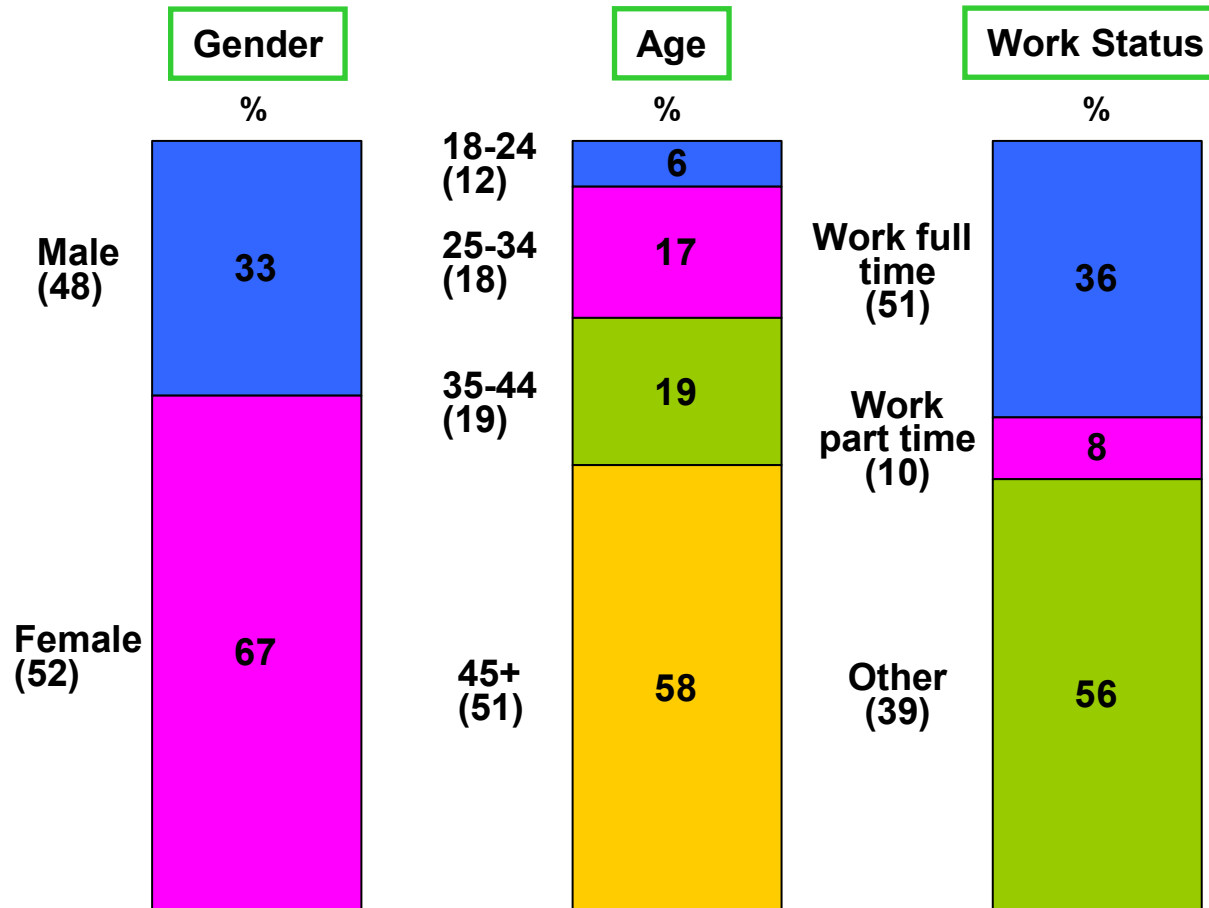
(Base: All Adults 18+ - France)



Meal preparer female and 35+ years

(Base: All Adults 18+ - France)

ALWAYS PREPARE OWN MEAL



Meal preparers are less likely to be working either full time or part time.



Stir frying most popular

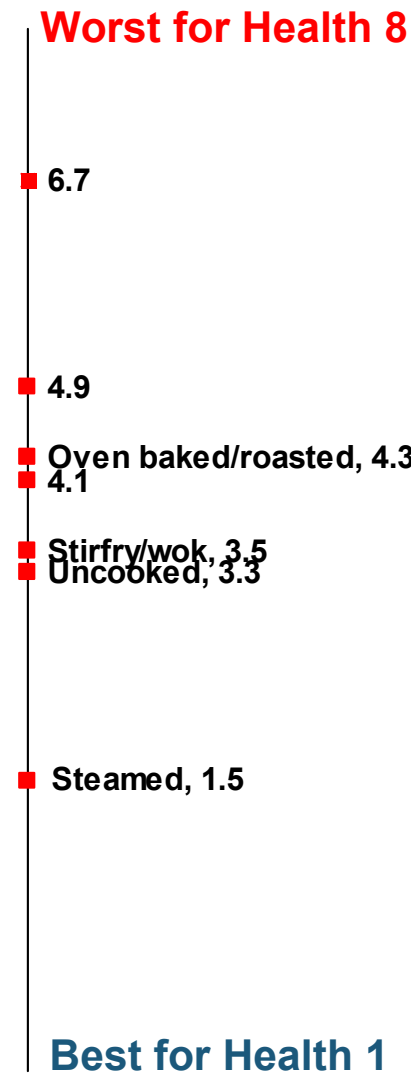
(Base: All who always prepare own meals – 57%)



 * Amendment to question in 2008, data not directly comparable to 2006

Steaming considered healthiest

(Base: All adults 18+ who always prepare their own meals)

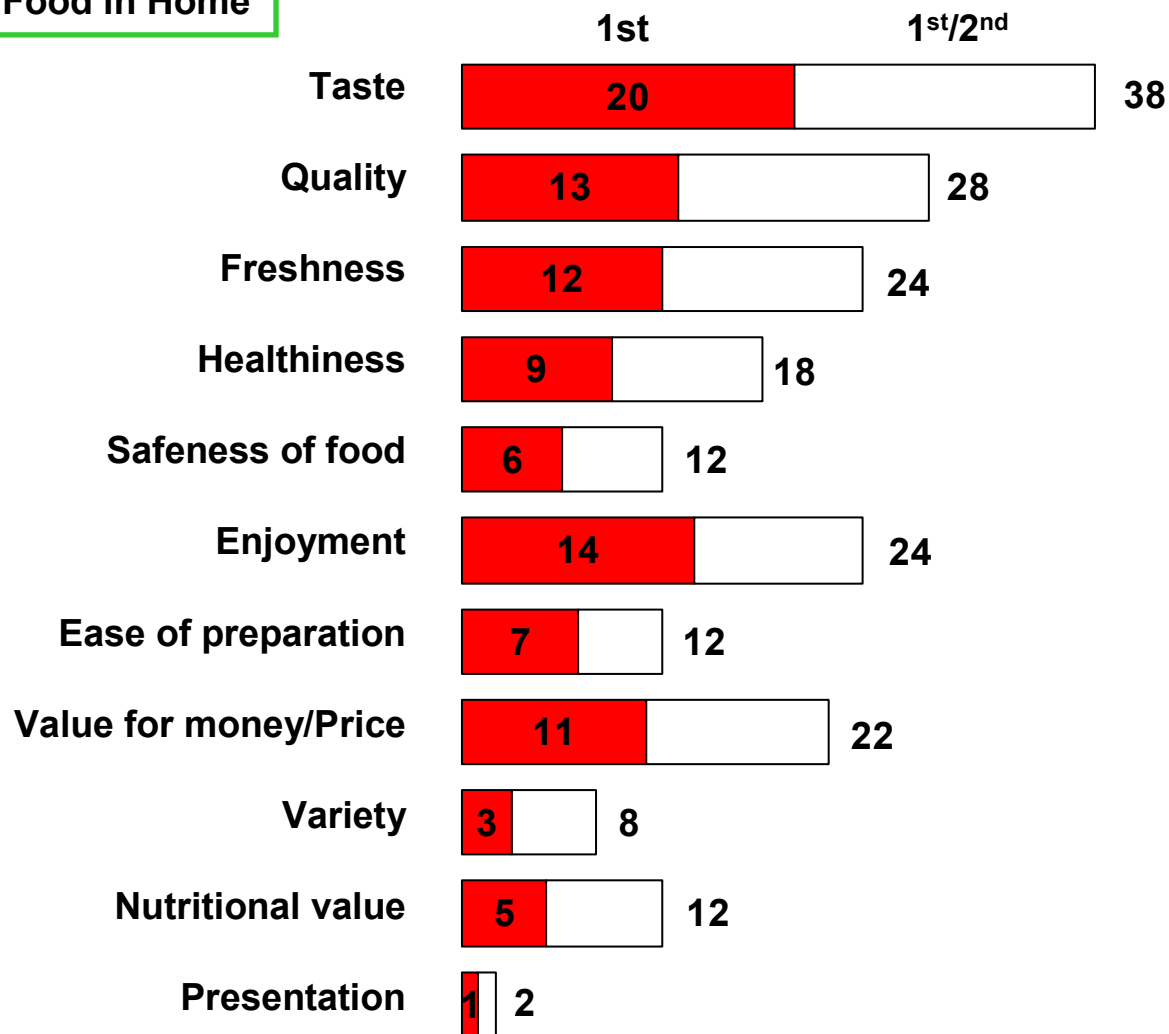


Ranked from 1 through 8.
1 = Best for health, 8 = Worst for health

Taste, quality and enjoyment most Important factors

Ranking of Factors Considered Important When Eating/Preparing Food in Home

(Base: All Adults 18+ - France)



 * Amendment to question in 2008, data not directly comparable to 2006

SECTION 3: Eating Out of Home



Eating out of home summary points

- ◆ **French consumers are eating out more often than in 2006.**
 - There has been an increase in the proportion eating in café's, restaurants or bars. Younger French adults (18-34 yrs) are more likely to eat out.
 - Takeaway meals are also being consumed more, especially among those under 45 years.
 - There has also been a small increase in the proportion having meals or snacks delivered to the door.
 - Midweek dining has declined since 2006 levels. It is seen as less of a treat and more of a chance to catch up with friends or when time is short and there is no food at home.

- ◆ **Time pressure is impacting eating at work practices.**
 - French workers are more likely to eat at their desks than in 2006. This is especially true among Parisians.
 - French consumers are also eating in the car more often and frequency of eating at work everyday has declined.

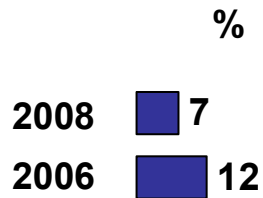


Midweek eating out declined

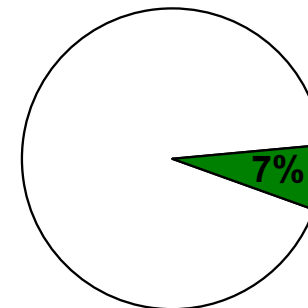
(Base: All Adults 18+ - France)

“Do you find you are eating out during the week more often or not?”

Incidence of Eating Out More Often During the Week



Factors Influencing Incidence



Yes

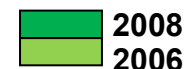
1. Just feel like a treat/something different (46%).
2. Chance to meet with friends/catch up (48%).
3. More choice of places to eat out locally (24%).
4. Don't want to wait for something to cook/no time to prepare (29%).
5. Working day is longer (23%).

The younger age groups (18-34yrs) report higher levels of eating out mid week.



Eating out mid week less of a treat and more a chance to meet up or lack of time

(Base: All who eat out more during the week – 8%)



Factors Influencing Decision to Eat Out More



Longer working and commuting times seem to impact the amount of time available to cook.

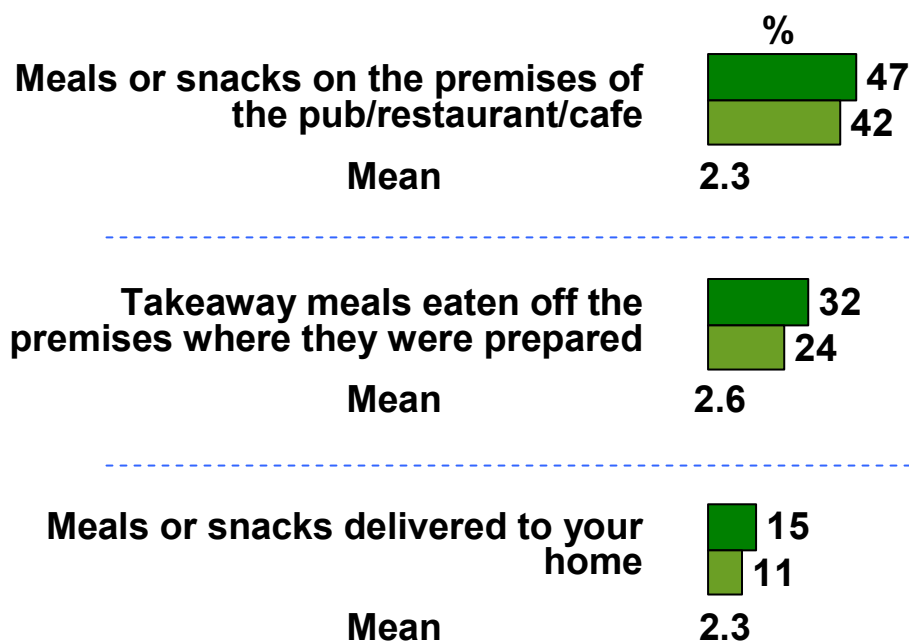


Consumption of meals prepared out of home increased

(Base: All Adults 18+ - France)



Meals Eaten Out in the Last 7 Days – Summary



The younger age groups(18-34 yrs) are more likely to have eaten a meal or snack in a café/bar. Takeaway meals are most popular amongst those under 45 yrs. While the highest proportion having meals delivered to the door are 25-34 year olds.



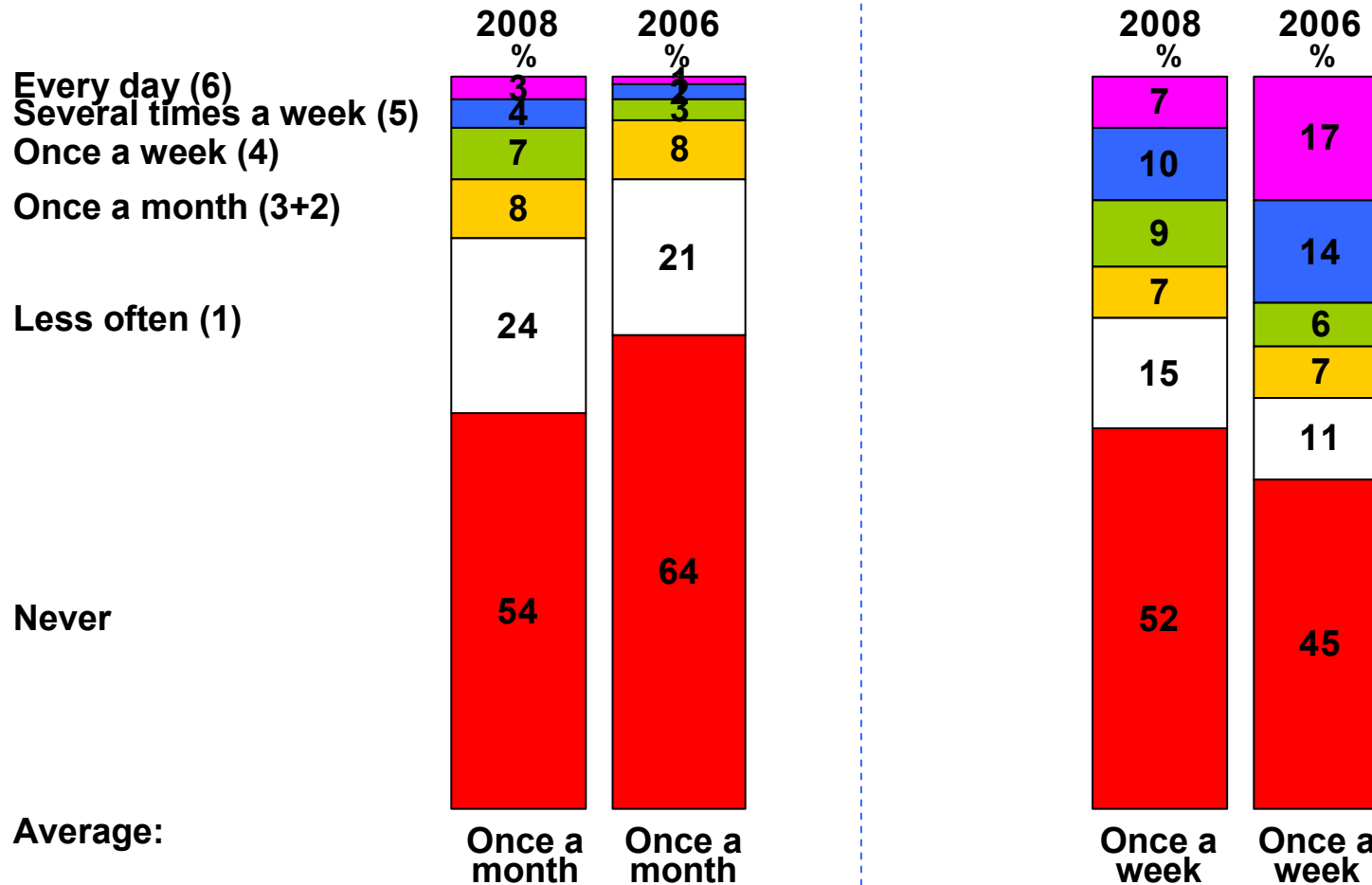
Frequency of eating in car up slightly while declining at work

Frequency of Eating in Car/at work (Excluding Sweets and Chocolate)

(Base: All Adults 18+ - France)

In the car

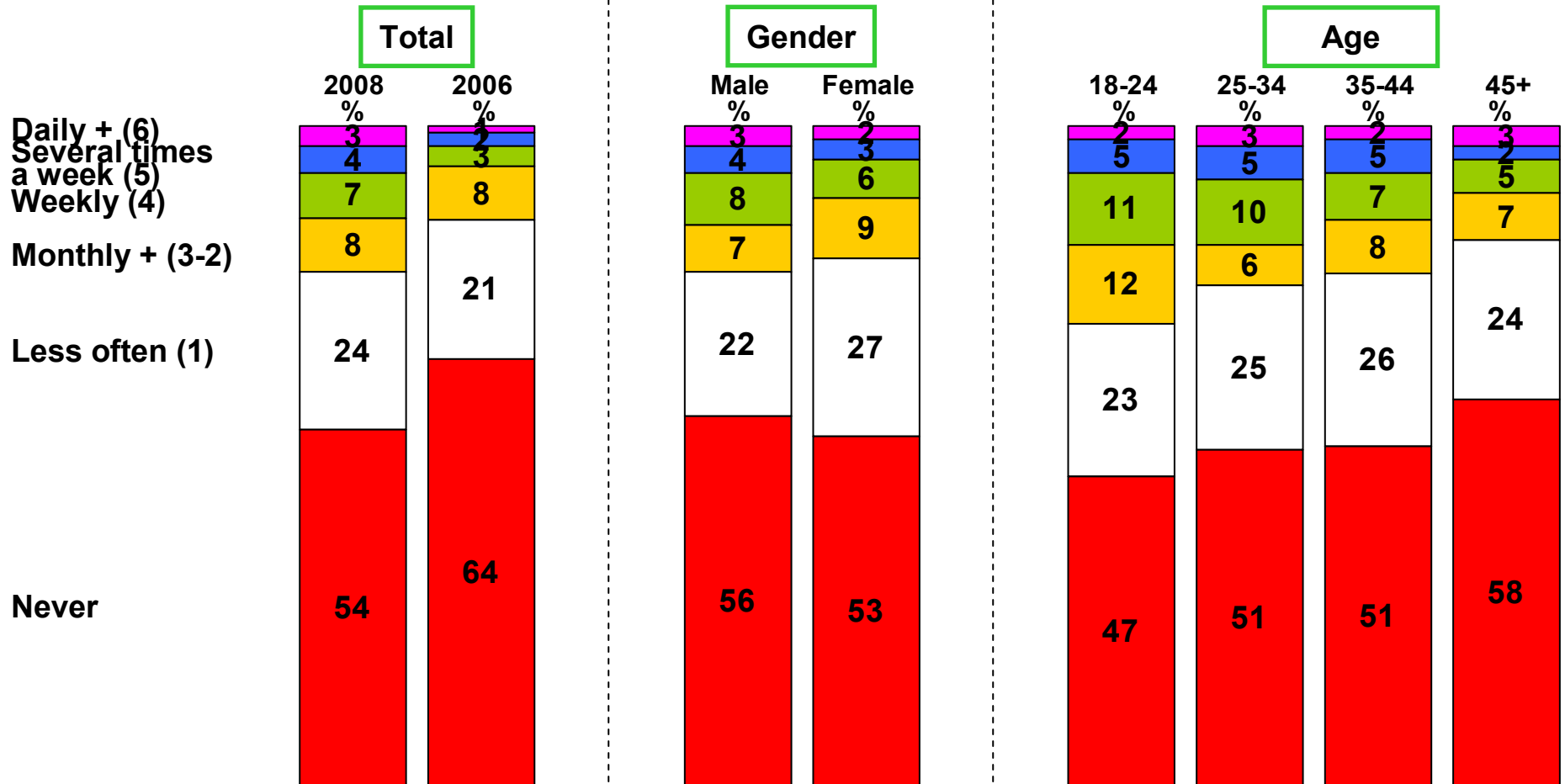
At work



Males and younger more likely to eat in car weekly

Frequency of Eating in Car
x Demographics (Exc.
Sweets and Chocolates)

(Base: All Adults 18+ - France)



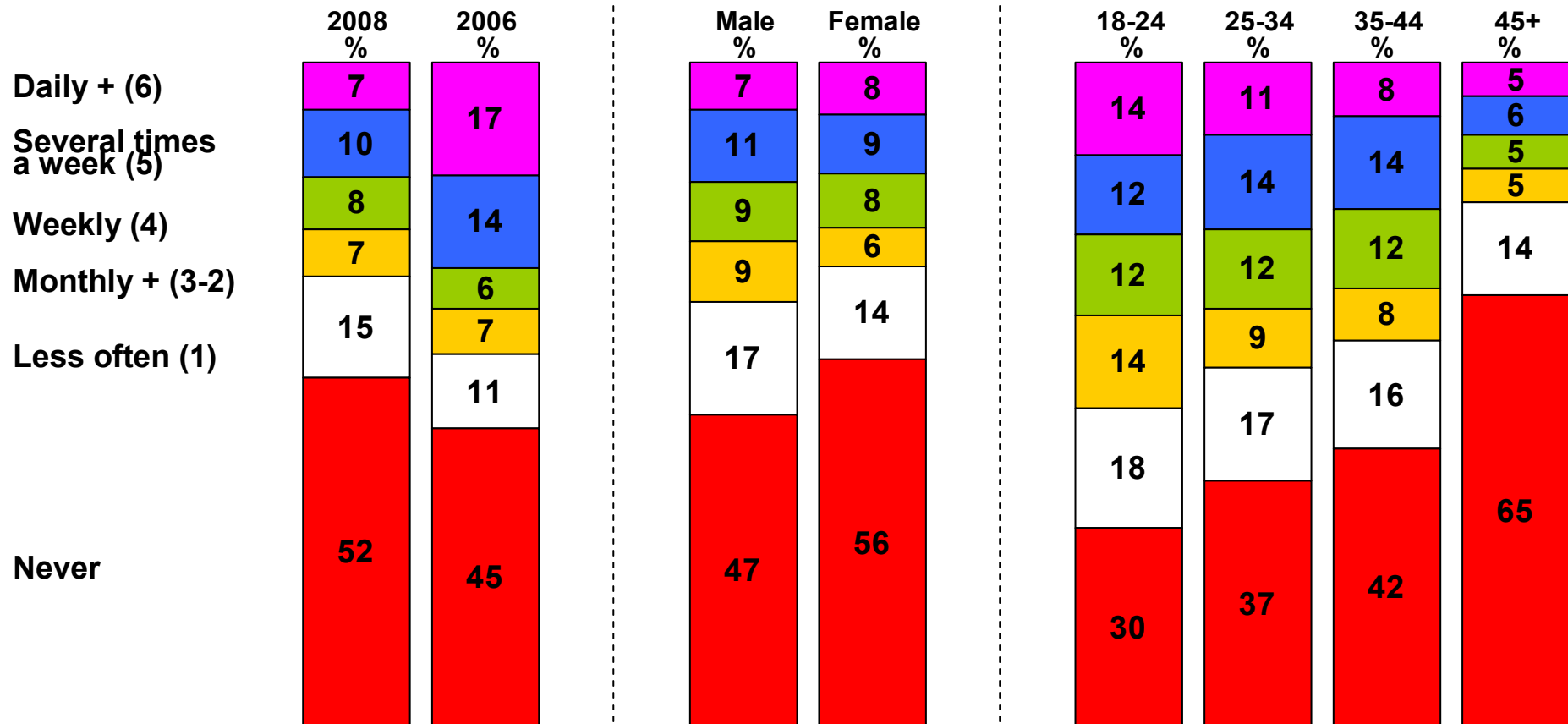
Younger more likely to eat at work frequently

Frequency of Eating at Work x Demographics
(Excluding Sweets and Chocolate)

(Base: All Adults 18+ - France)

Gender

Age



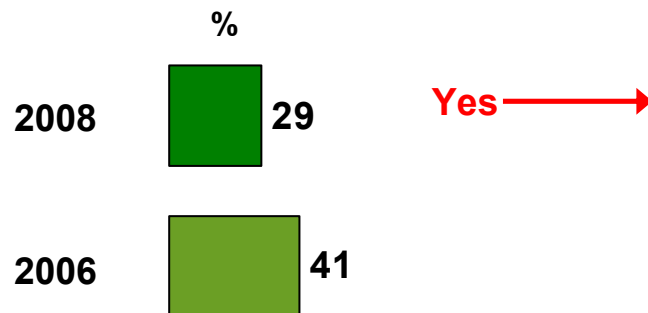
Fewer eating lunch at work, of those that do more eat at their desks

Location (Most Often) for Eating in Workplace

(Base: All Adults 18+ - France)

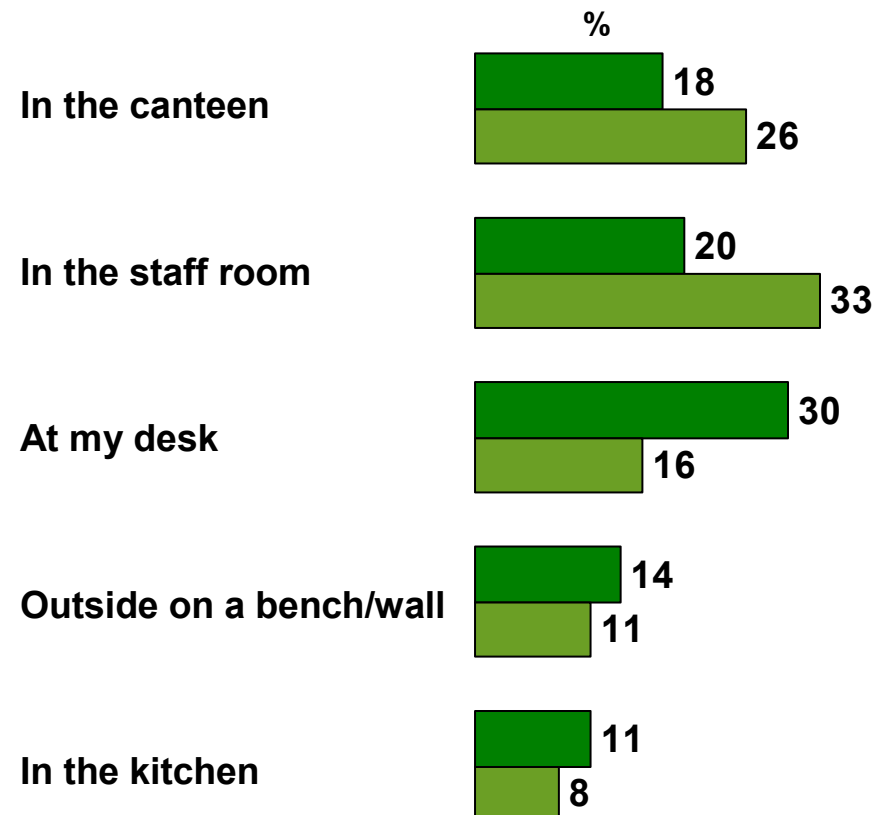
2008
2006

% eat more than twice monthly



Workers in the Paris region are more likely to eat at their desk compared to other regions.

Location of Eating



SECTION 4: Health and Wellbeing



Attitude towards diet and wellbeing summary points

- ◆ **Just under three quarters of French consumers regard their diet as fairly or very healthy.**
 - **Females and those 45+ years are most likely to have a healthy diet.**
 - **18-24 year olds are more likely than other age groups to report that their diets are less healthy than a year ago.**

- ◆ **French consumers try to have a balanced diet and to limit fast food more than in 2006. They are more likely to believe that it is not they type of food that you eat but the quantity of food that contributes to health problems. Healthy food is also seen as contributing to a better lifestyle and improved mental health. However, there is agreement with the sentiment that healthy food is boring and limiting. Attempting to make eating healthily more fun will be a challenge for food manufacturers in the future.**

- ◆ **Enriched foods/functional foods and low fat foods are not seen as ‘healthy’ as they were in 2006.**

- ◆ **Weight control is important for females and older consumers (45+years).**
 - **They are also more likely to check nutritional labels and to be concerned about the fat content of products.**



Attitude towards diet and wellbeing summary points

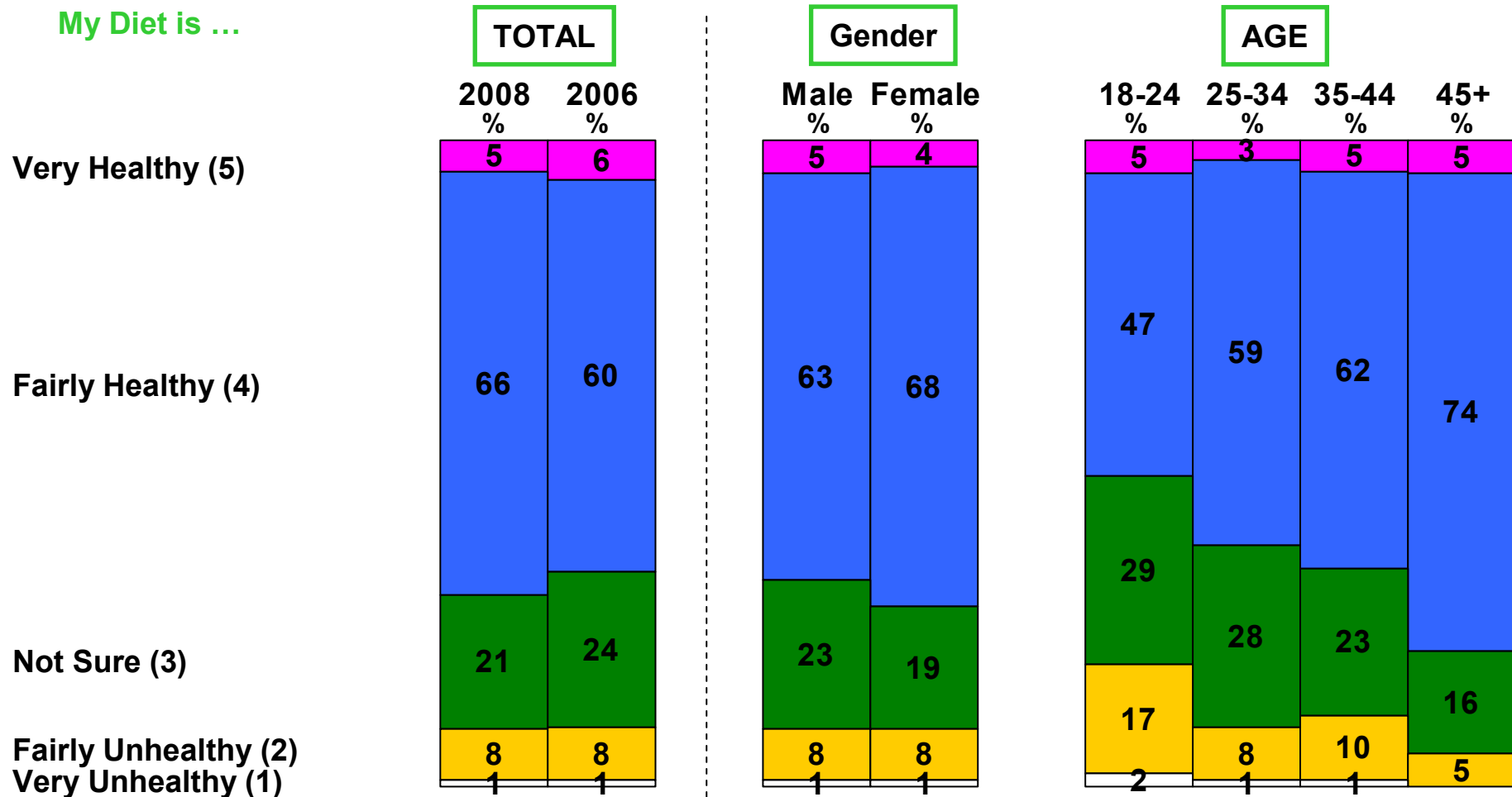
- ◆ **French consumers appear to have less difficulty understanding labelling and nutritional content on food products compared to 2006 levels.**
- ◆ **Younger French consumers have few cares about their health and wellbeing. It is more something they will deal with when they are older.**
 - **18-24 year olds are less aware of the nutritional benefits of food.**
 - **They are less likely to consider the impact good food has on their mental health.**
 - **Food is seen more as just something to be enjoyed.**
 - **Quantity of food is seen as more of the healthy issue than the quality of food.**



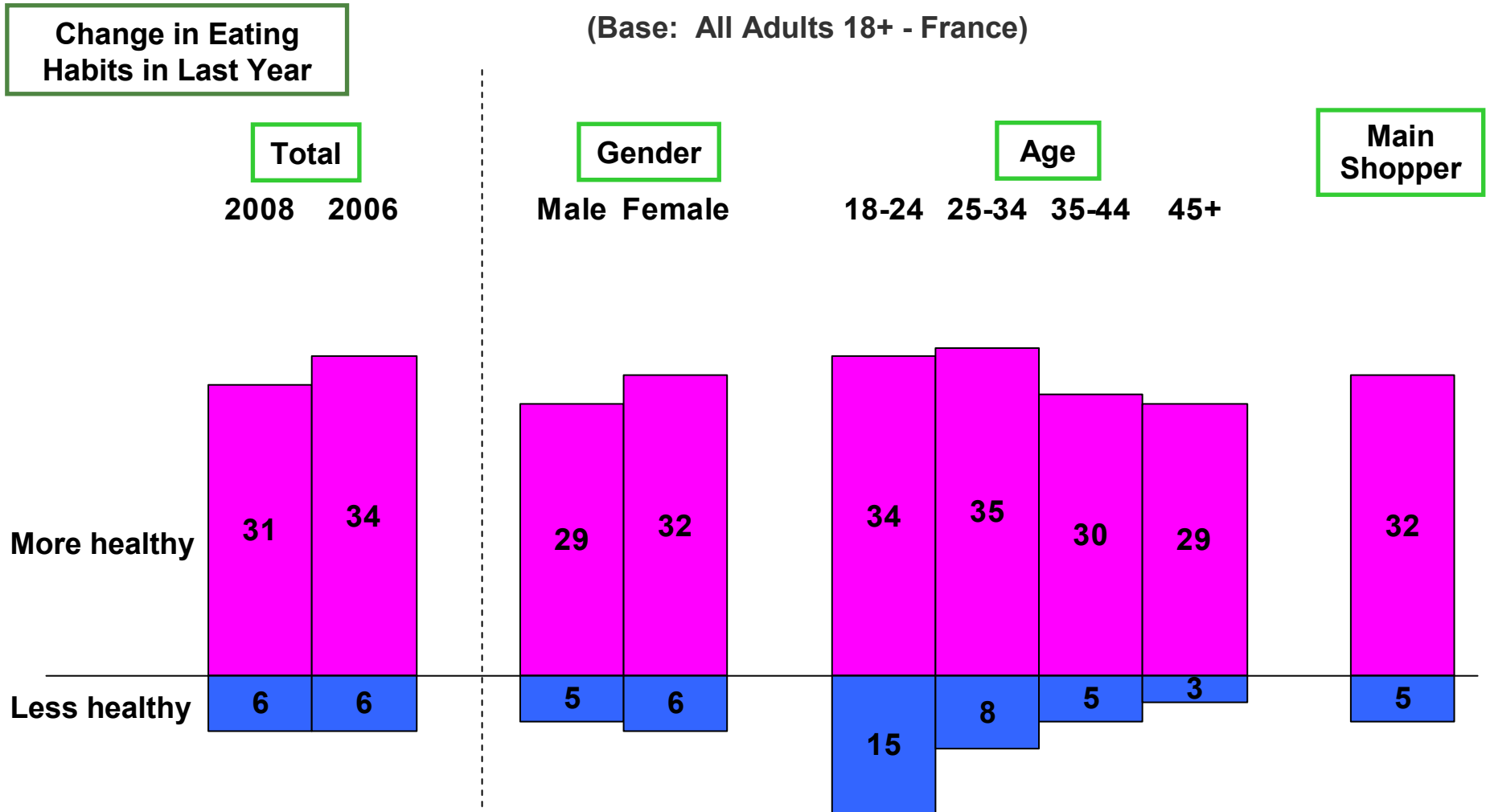
Females and older adults consider diets healthier

(Base: All Adults 18+ - France)

My Diet is ...



General movement towards more healthy diets



18-24 year olds are more likely to report that their diets have become less healthy than other age groups.

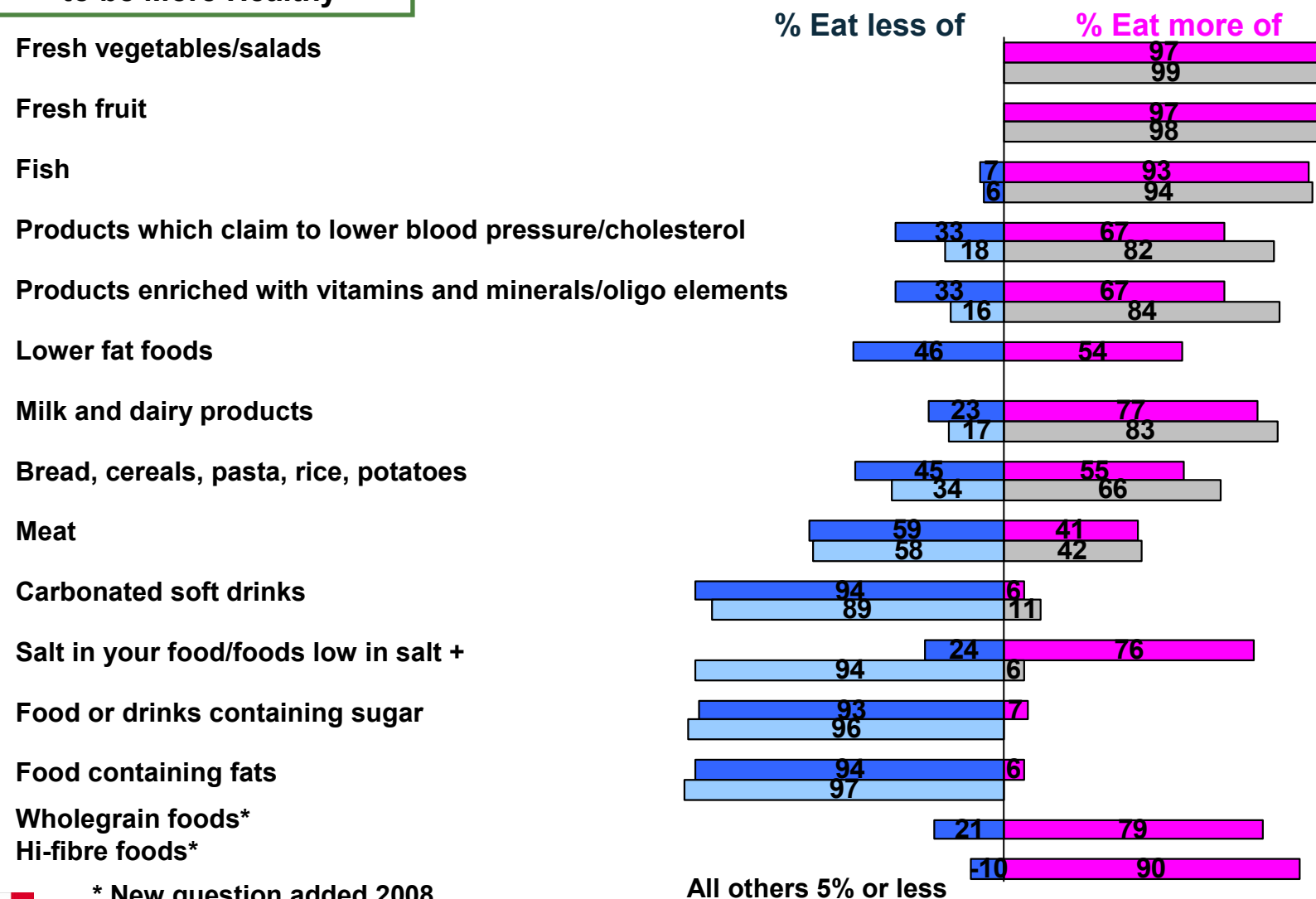


Increase in negativity towards low fat and enriched products

Items Eaten More if Trying to be More Healthy

(Base: All Adults 18+ - France)

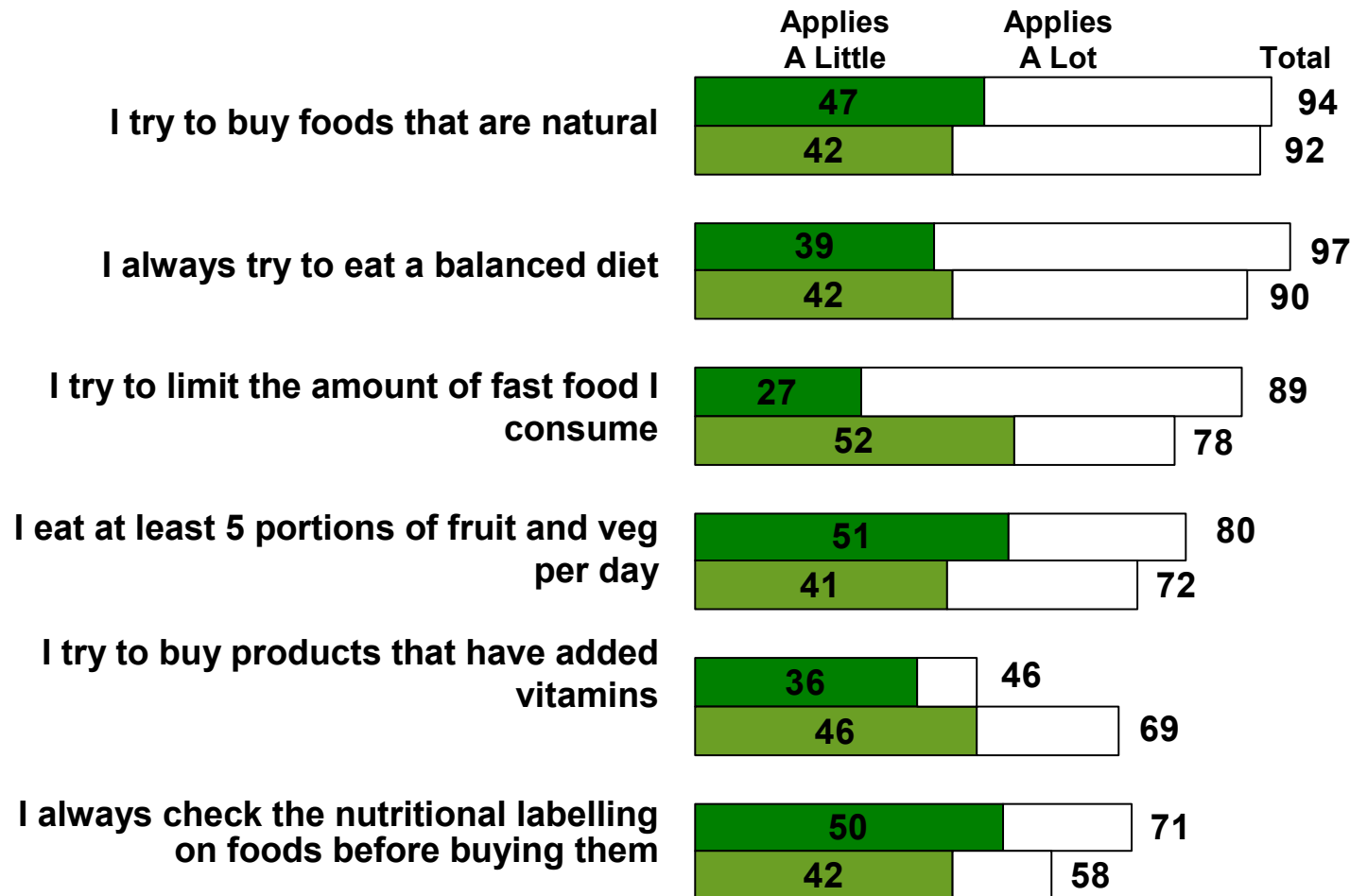
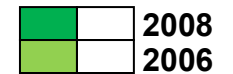
2008
2006



* New question added 2008
+ Change in wording in 2008

More Striving for a Healthy, Balanced Diet

(Base: All Adults 18+ - France)

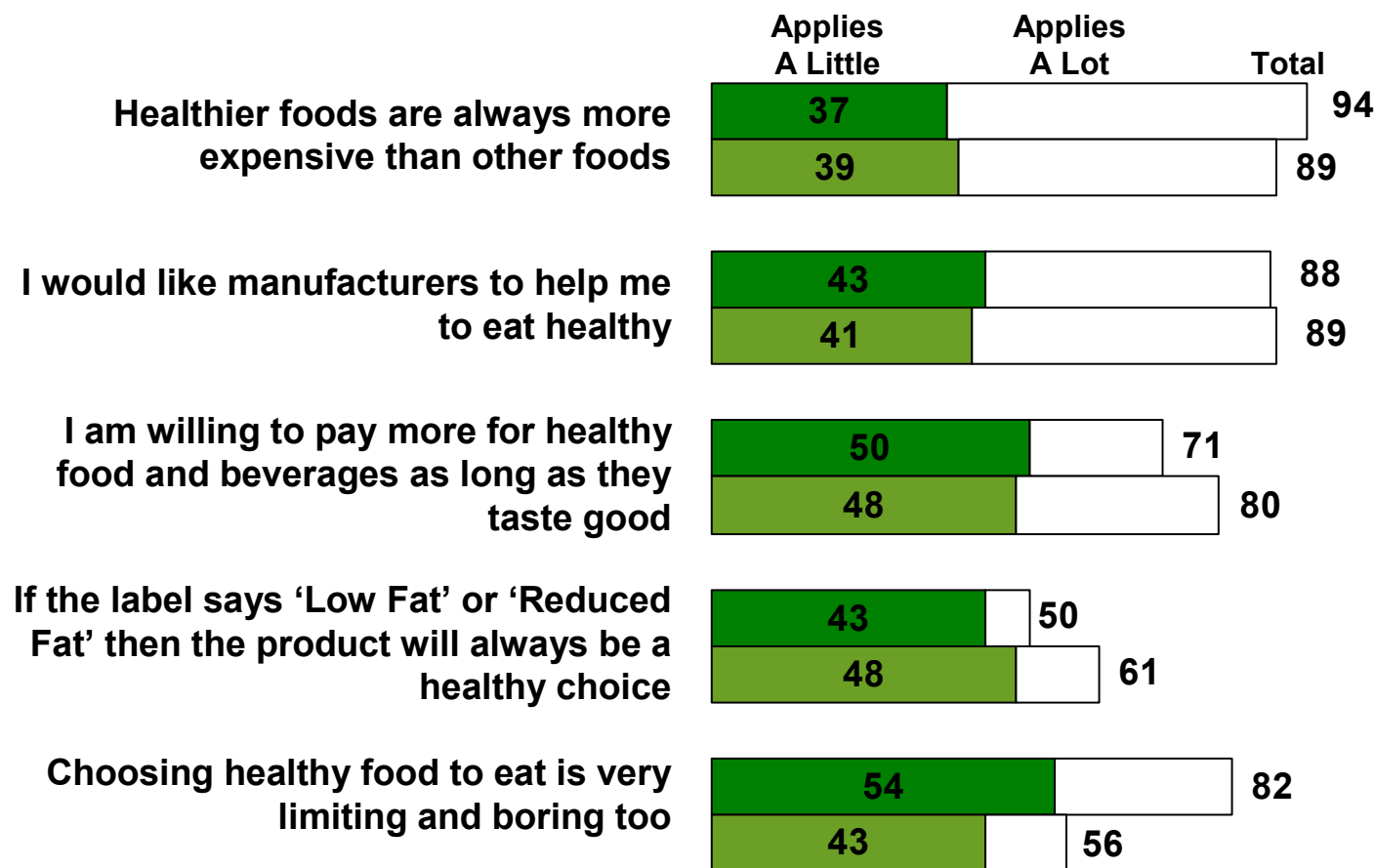


Females and older consumers (45+yrs) are more likely to eat a balanced diet with adequate amounts of fruit and veg. They are also more likely to check labels. Older consumers (gender balanced) look for natural foods and limit fast food in their diet.



Less confidence in 'low/reduced fat' labels being a healthy choice

(Base: All Adults 18+ - France)

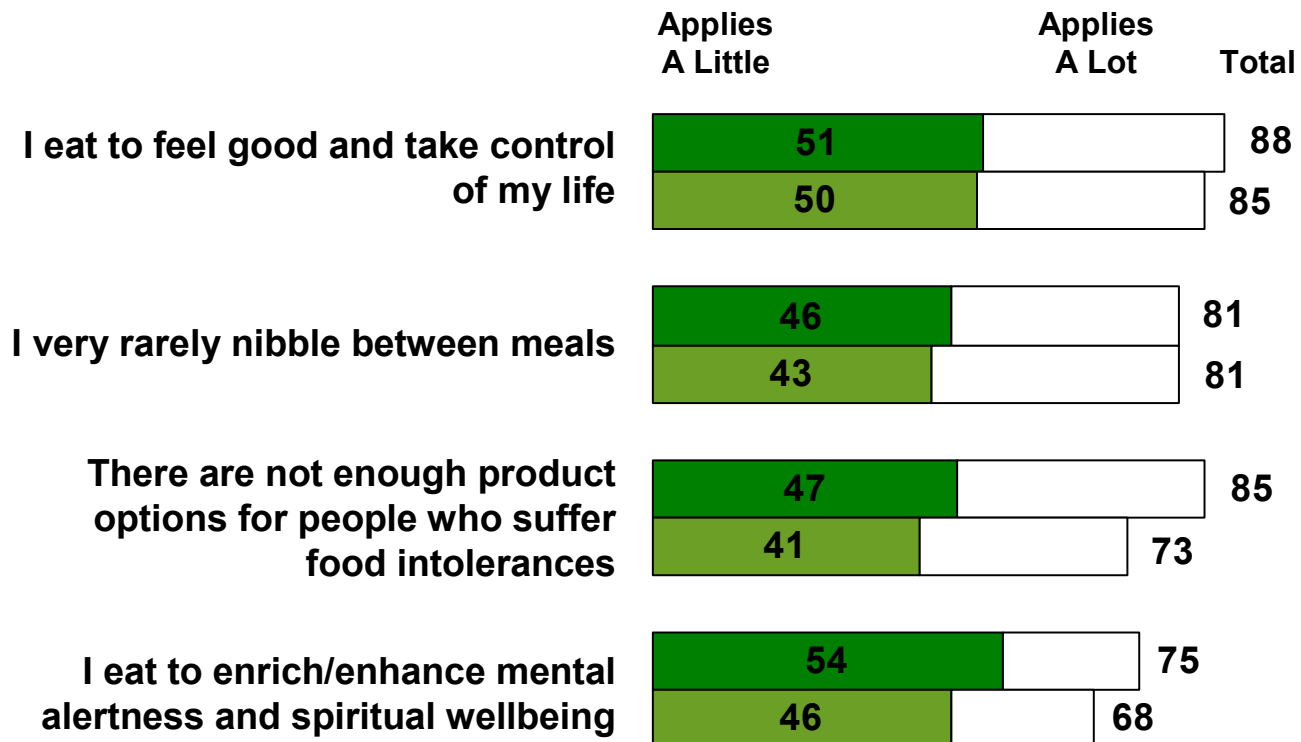
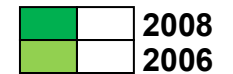


Females are more aware of the expense of healthier foods.



Food important for good lifestyle and wellbeing

(Base: All Adults 18+ - France)

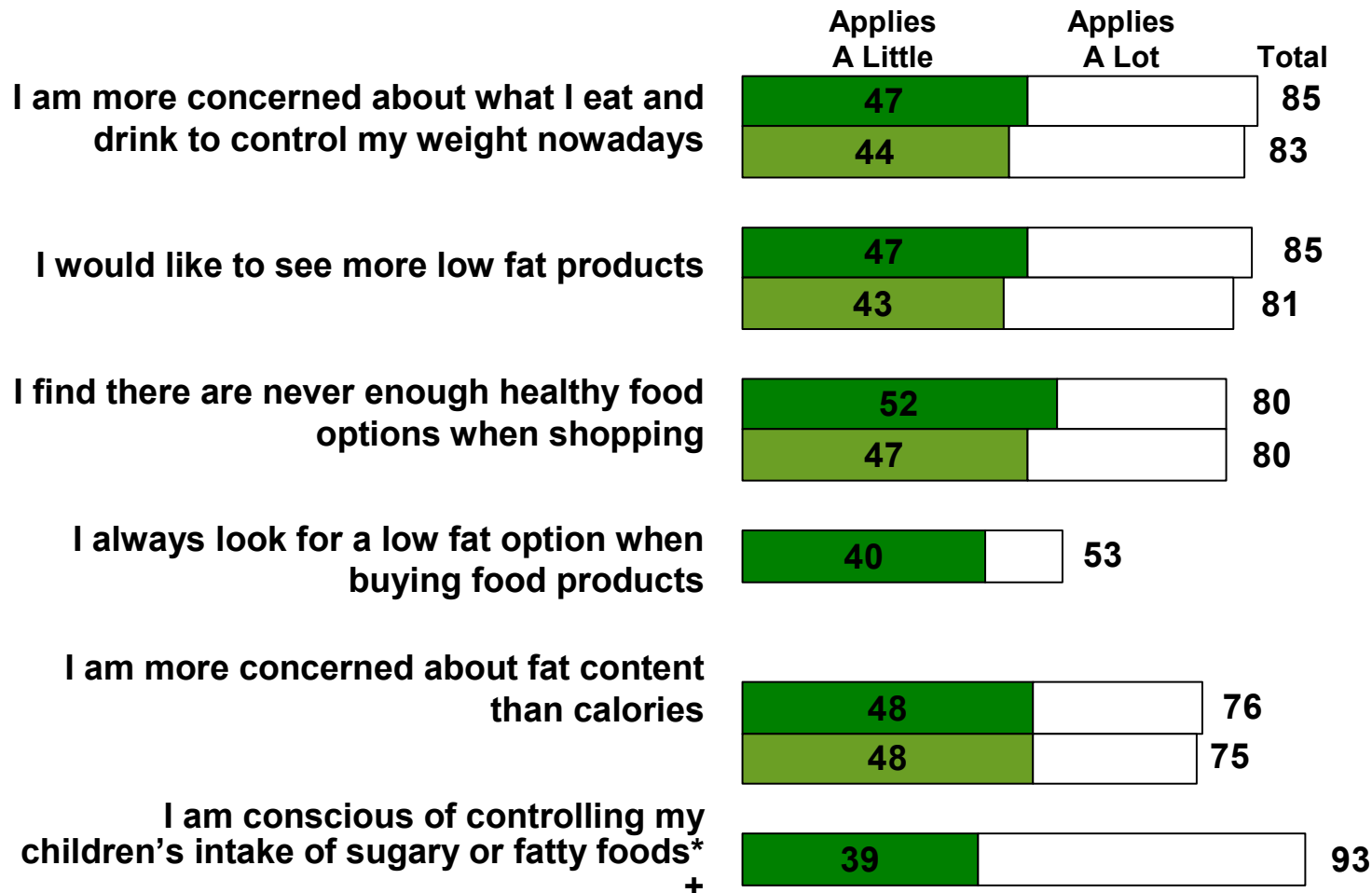
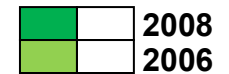


Older consumers are less likely to snack between meals. Females are more aware of the limited options available for people who suffer from food intolerances.



Weight control remains important

(Base: All Adults 18+ - France)



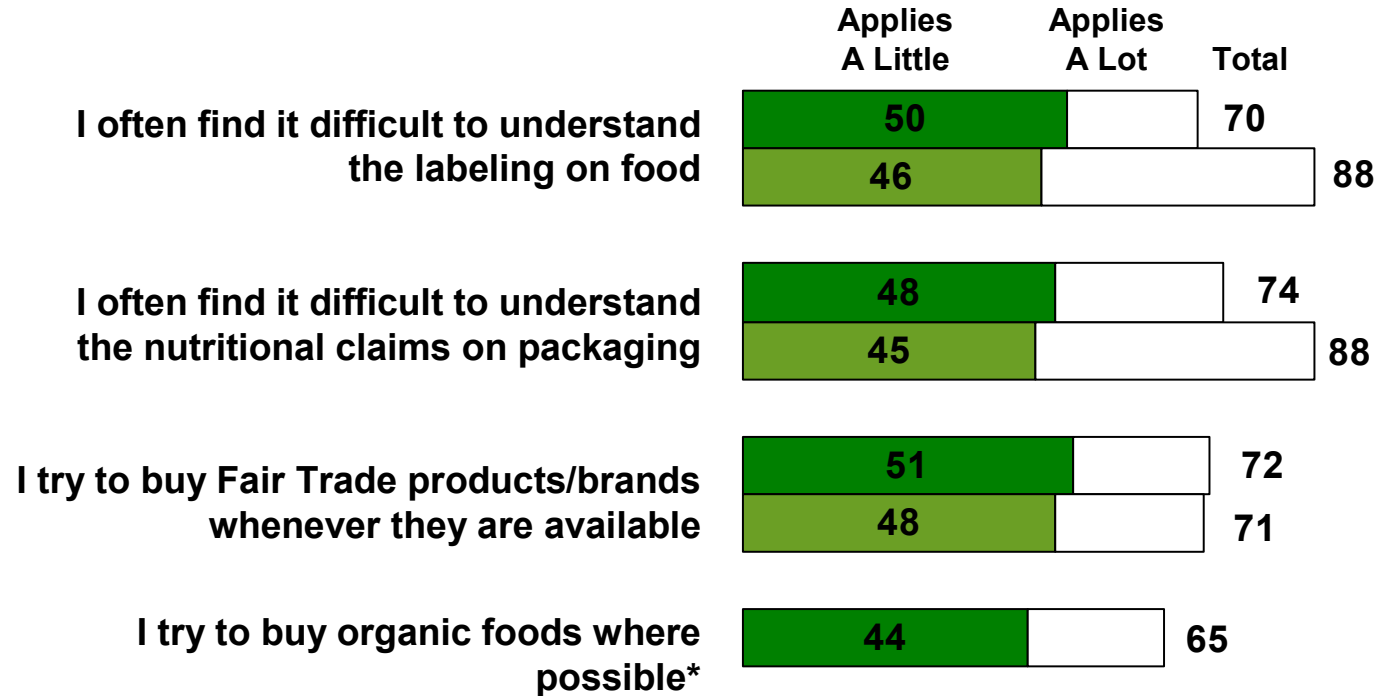
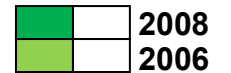
Females and older consumers (45+yrs) are more concerned about controlling their weight, the fat content of products, and of controlling what their children eat.



* New question added 2008
+ Base: Have children

Improved understanding of labels

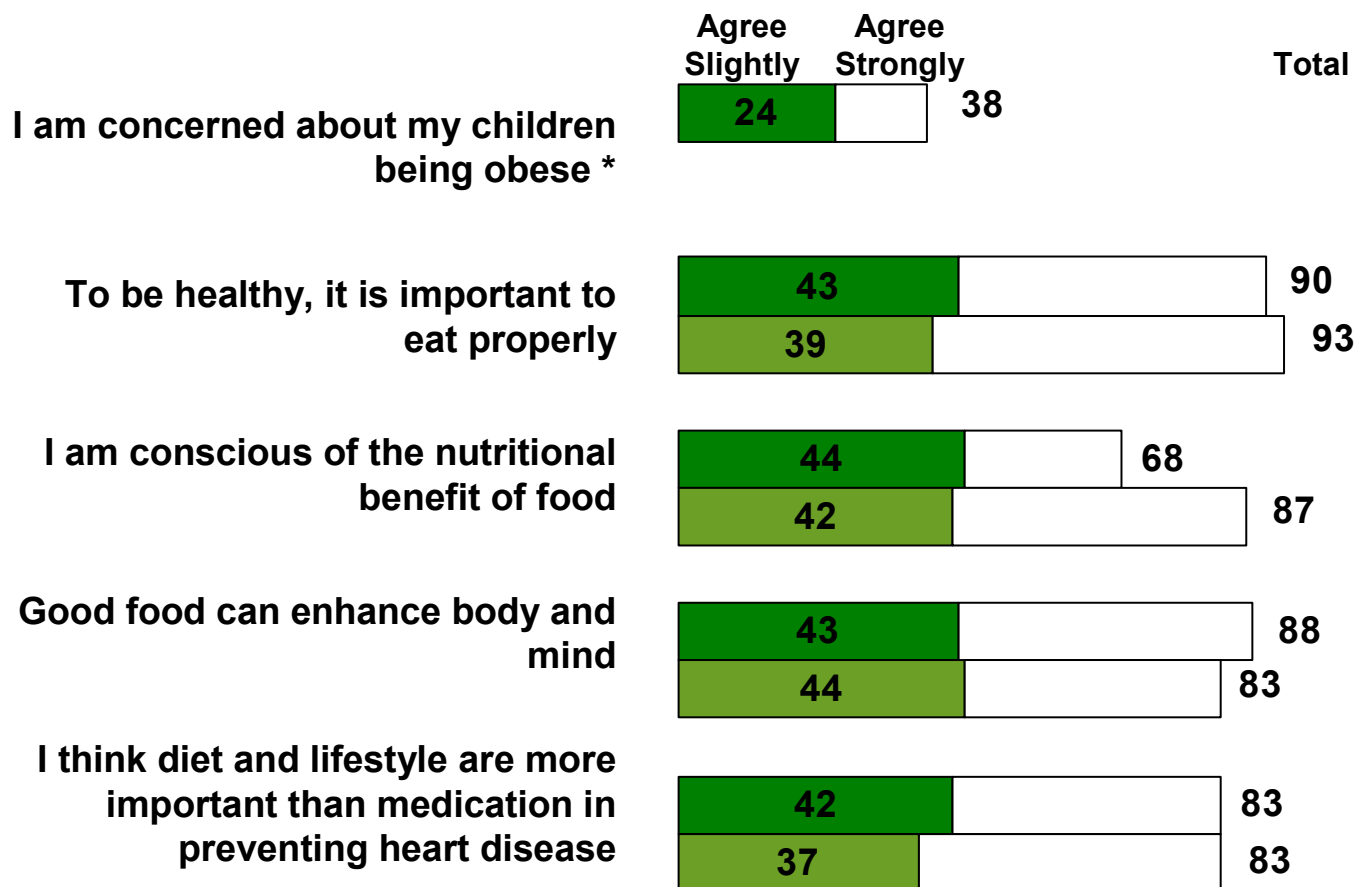
(Base: All Adults 18+ - France)



 * New question added 2008

Strong awareness of role food plays in maintaining Health

(Base: All Adults 18+ - France)

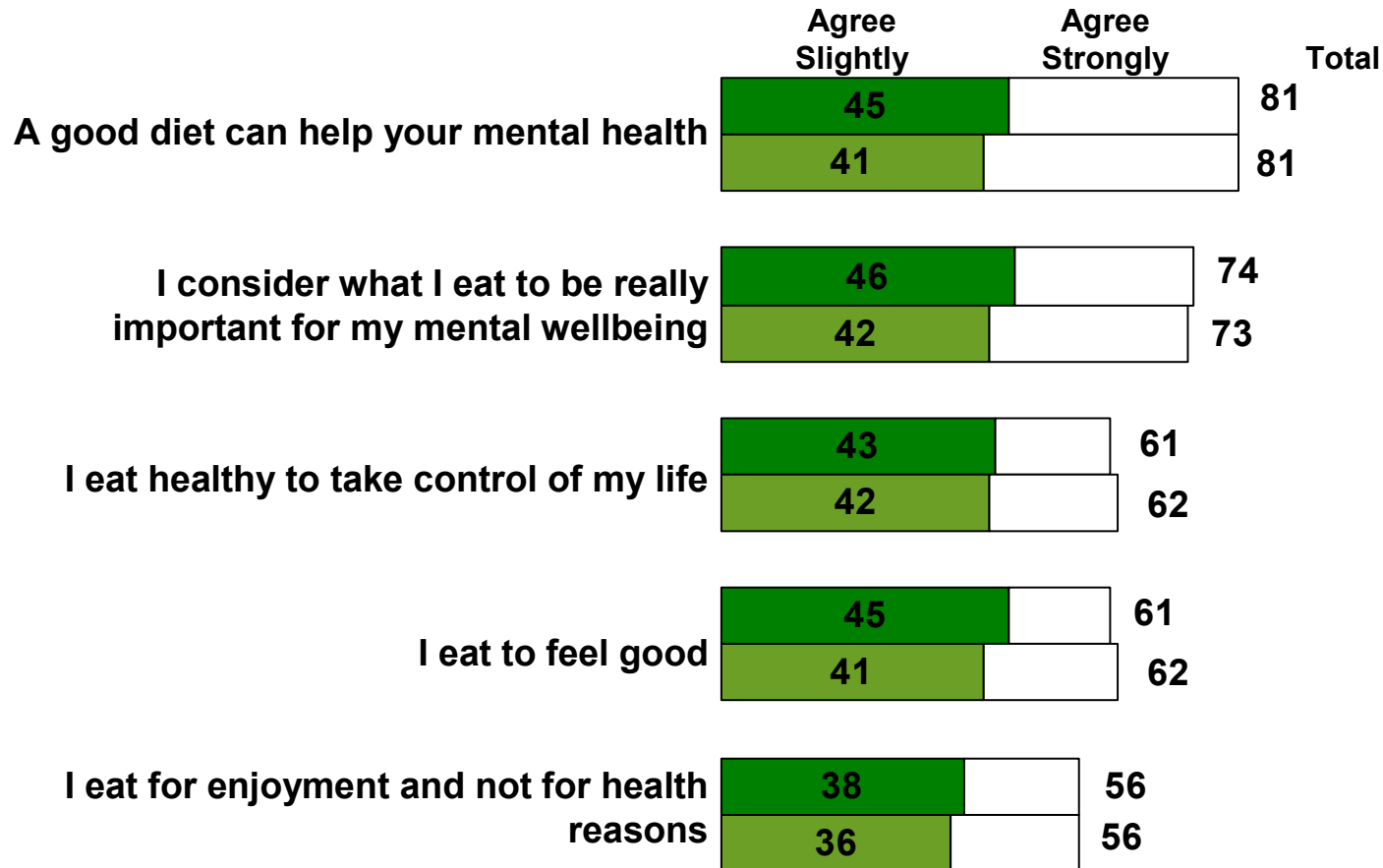
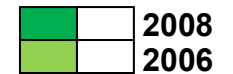


Females are more aware of the nutritional benefit of food while the younger (18-24) age group are less aware of the benefits of nutrition.

 * Base: Those with children

Diet considered important for mental health

(Base: All Adults 18+ - France)

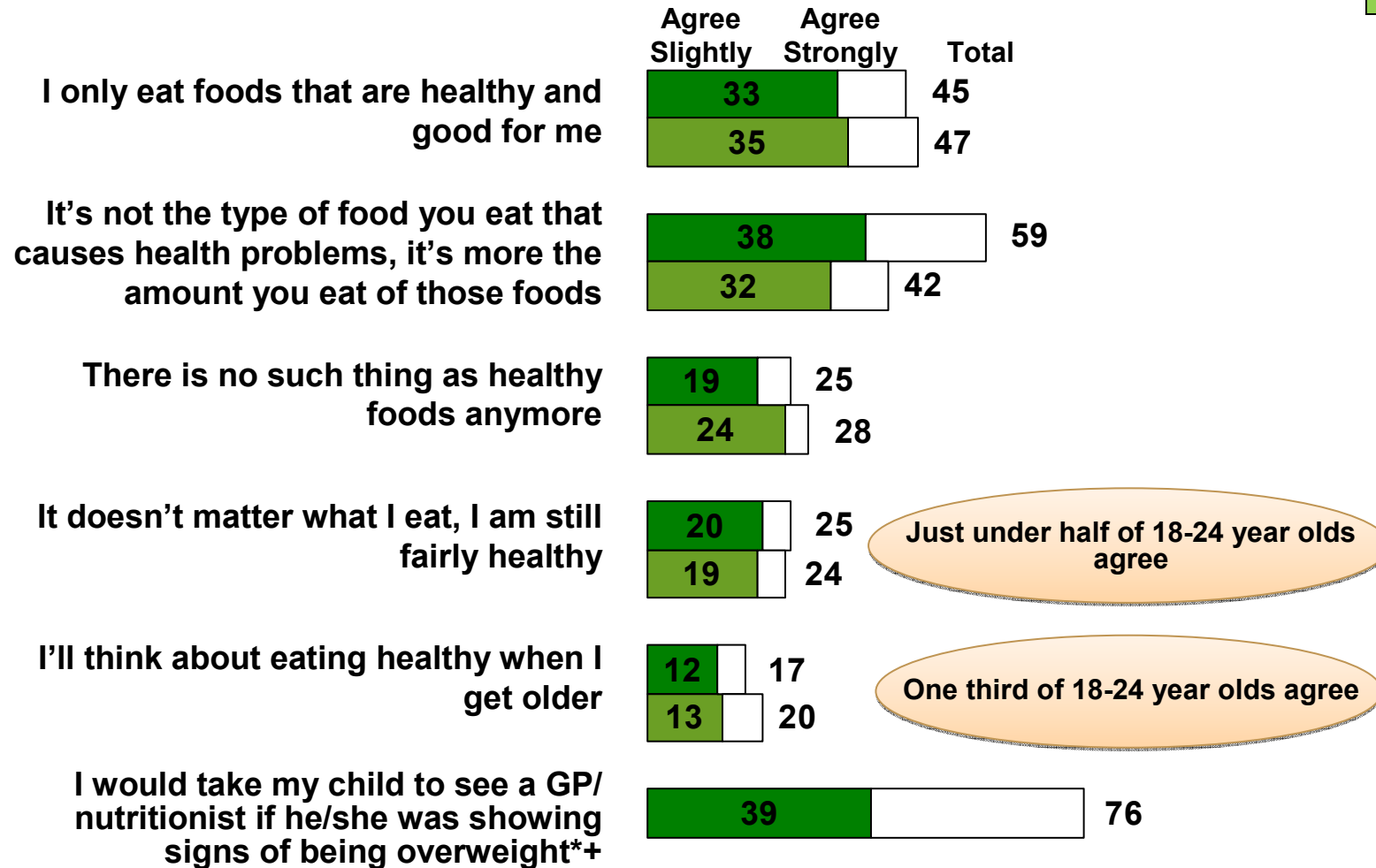
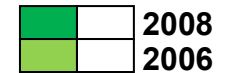


Younger age group (18-24yrs) less likely to agree that diet impacts their mental wellbeing. They see food more as something to be enjoyed.



Portion control seen as important

(Base: All Adults 18+ - France)



Younger French consumers (18-24yrs) are less concerned about their health. They believe that it is not the type of food but the amount of food that contributes to health problems.

*New question added 2008
+Base: Those with children

SECTION 5: Environmental Issues



Environmental Issues

- ◆ **Nine out of ten French consumers are aware of Sustainability.**
 - **One third of consumers claim it has an impact on their shopping habits.**

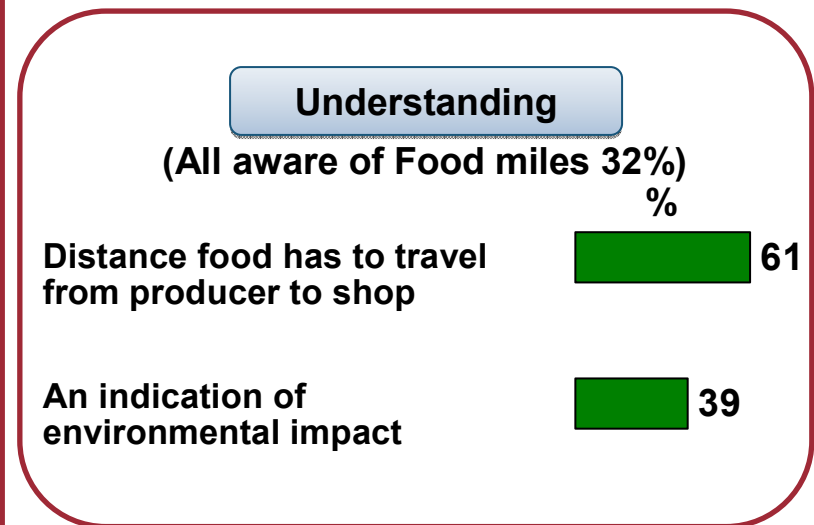
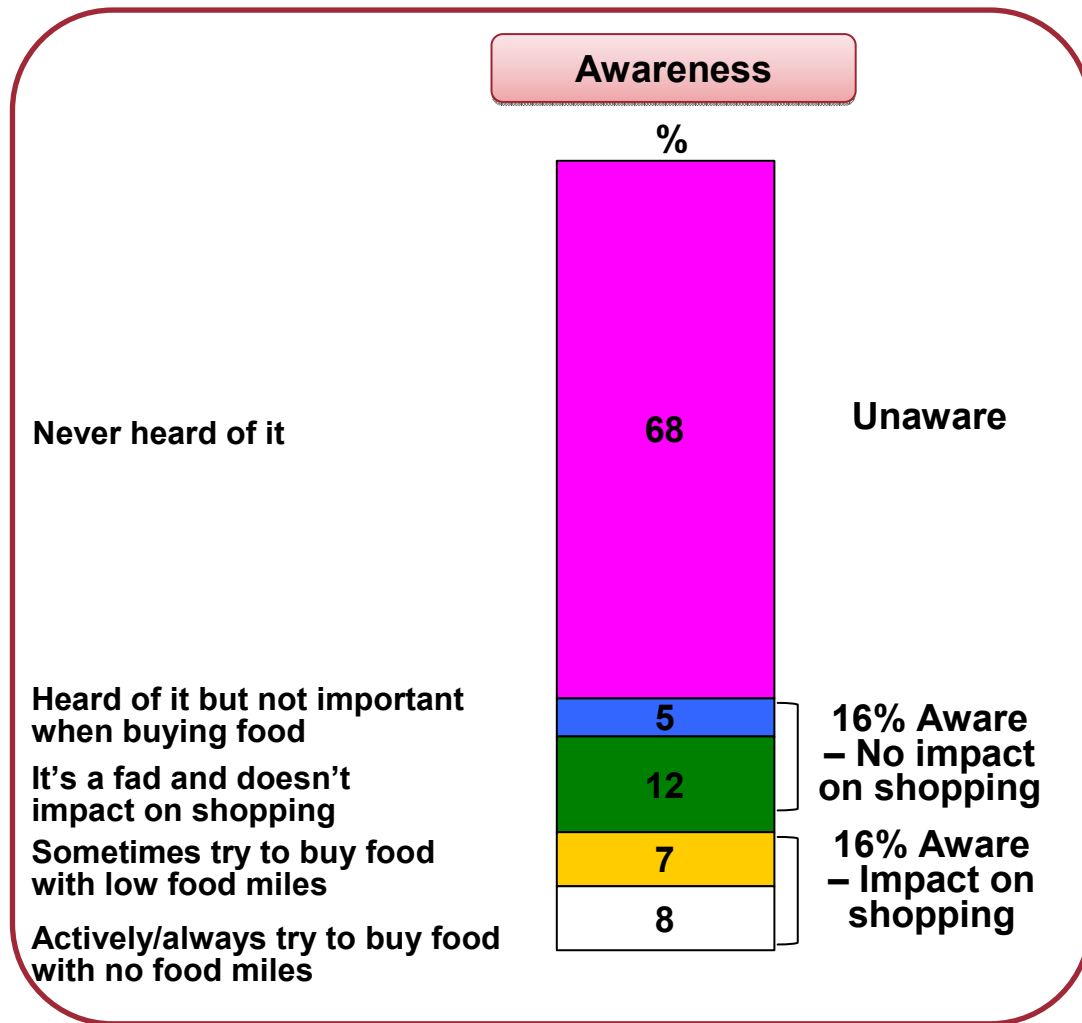
- ◆ **Awareness of Food Miles and Carbon Footprint are much lower with over half unaware.**
 - **Older consumers have higher levels of awareness of both terms, while younger consumers (18-24 years) appear less interested in any environmental issues.**

- ◆ **French consumers have a positive attitude towards the environment. When shopping they look for products from companies who are aware of the environment and look for recycled/recyclable packaging when possible.**



Low awareness of 'food miles'

(Base: All adults 18+ Years)

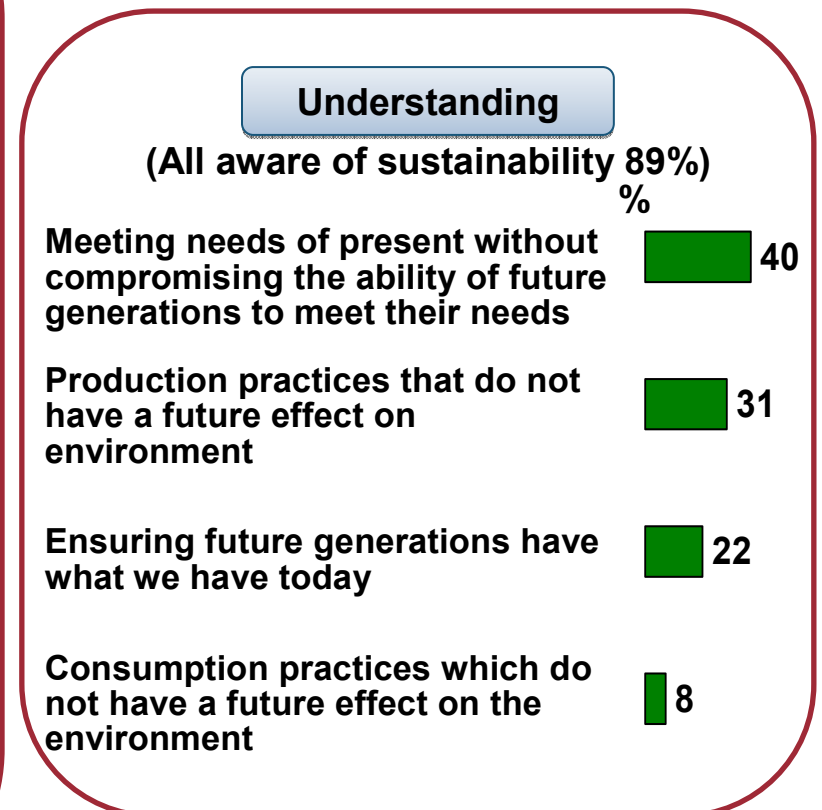


55+ yrs have a greater awareness of 'food miles', although they are more likely to report it has no impact on their shopping.



Greater awareness of sustainability and impacting shopping

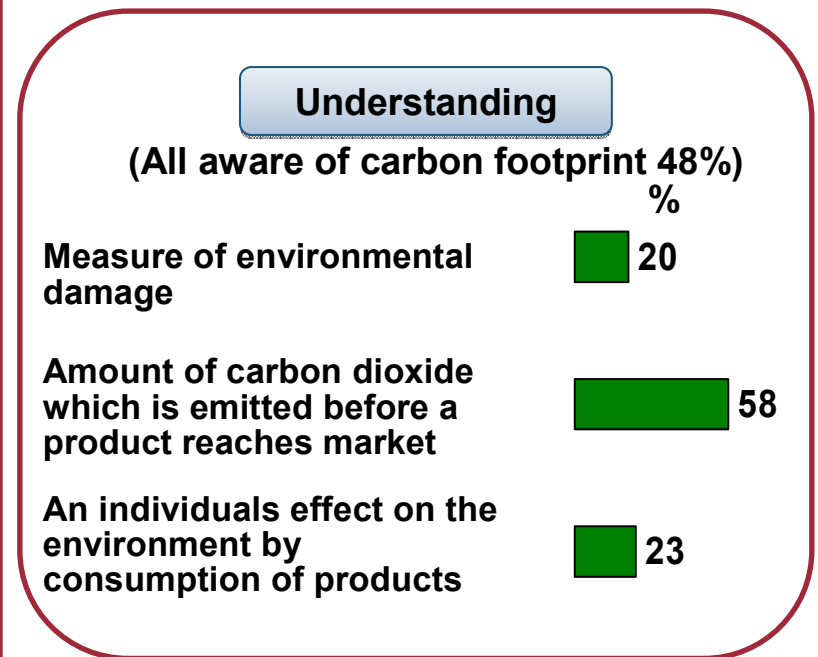
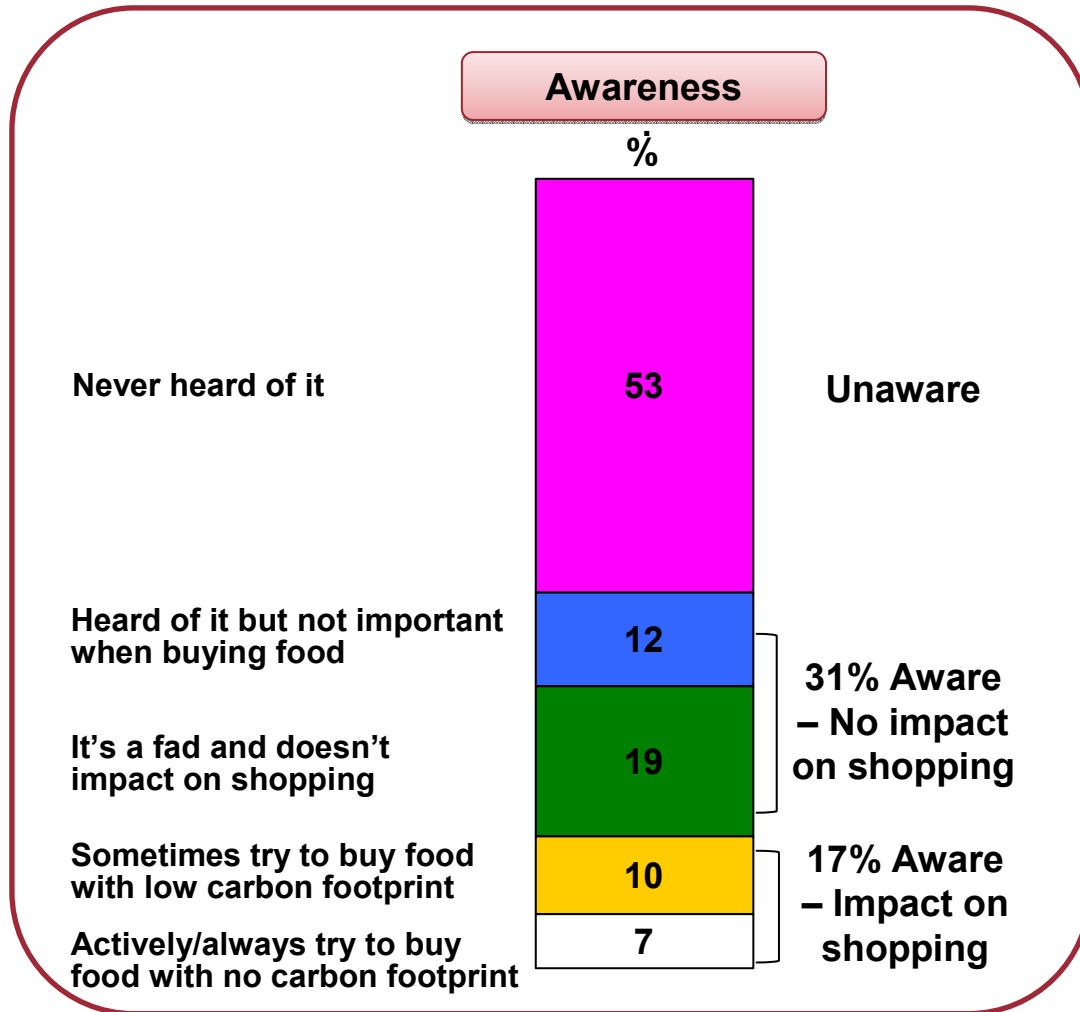
(Base: All adults 18+ Years)



Just over half unaware of 'carbon footprint'

2008

(Base: All adults 18+ Years)



As with 'Food Miles' the older (55+ yrs) have greater awareness of 'carbon footprint' but they more likely to report it has no impact on their shopping. Females have a lower awareness of the term 'carbon footprint'.



Environmental issues impacting on product choices

(Base: All Adults 18+ - France)



Older consumers (45+ yrs) show stronger attitudes towards environmental issues, while 18-24 years appear least concerned about the environment.

SECTION 6: Grocery Shopping



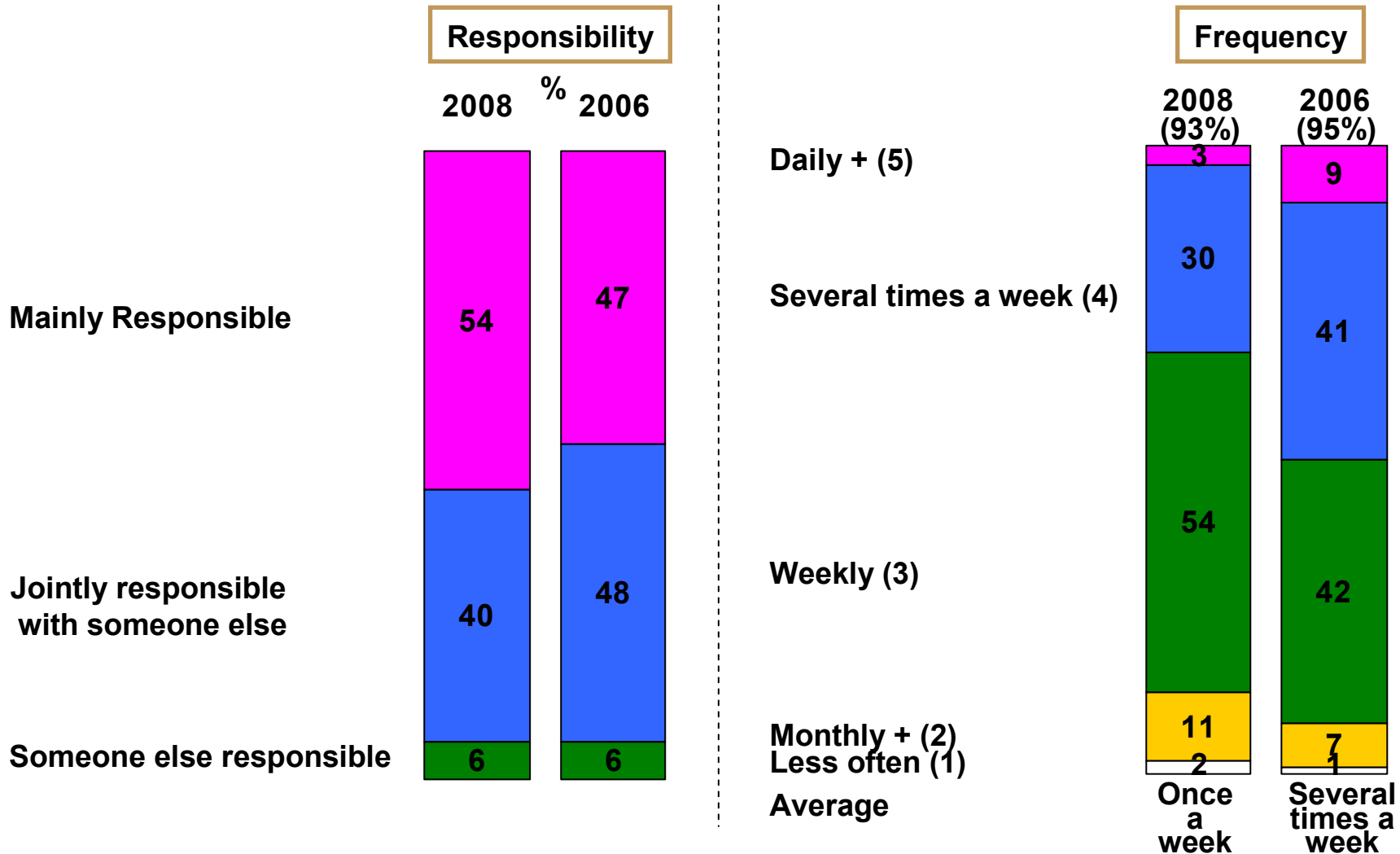
Attitudes towards grocery shopping summary points

- ◆ **French shoppers are shopping less frequently – more on a weekly basis. They are more concerned about price than in 2006.**
- ◆ **Younger shoppers (under 45 years) appear to be driving these changes. They shop less frequently and appear more concerned with price than older consumers.**
 - **Younger consumers are more likely to trade off quality of fresh foods for better prices and are more likely to seek out sales and promotions on groceries.**
 - **Impulse purchasing is stronger than in 2006**
- ◆ **In line with the increased interest in price, French consumers regard private label brands as just as good as branded products. They also report an increase in purchasing multi-packs – perhaps due to the cost savings they offer.**
- ◆ **Awareness of Ethical/Fair Trade products has increased, 9 out of ten French consumers are aware.**



Frequency of shopping declined

(Base: All Adults 18+ - France)

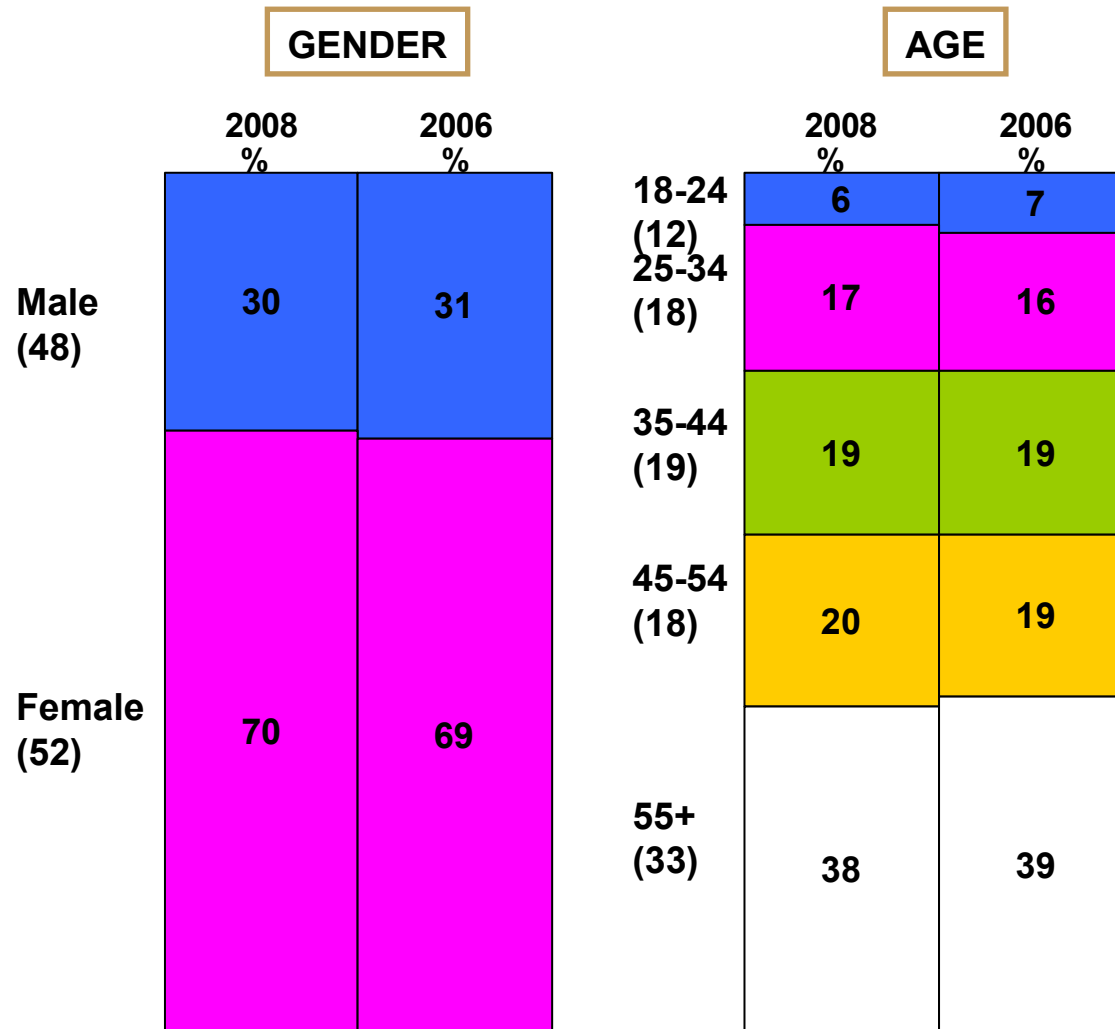


Younger shoppers are more likely to shop on a weekly basis while older shoppers (45+ yrs) are more likely to shop several times a week.



Primary grocery shopper is female and somewhat older

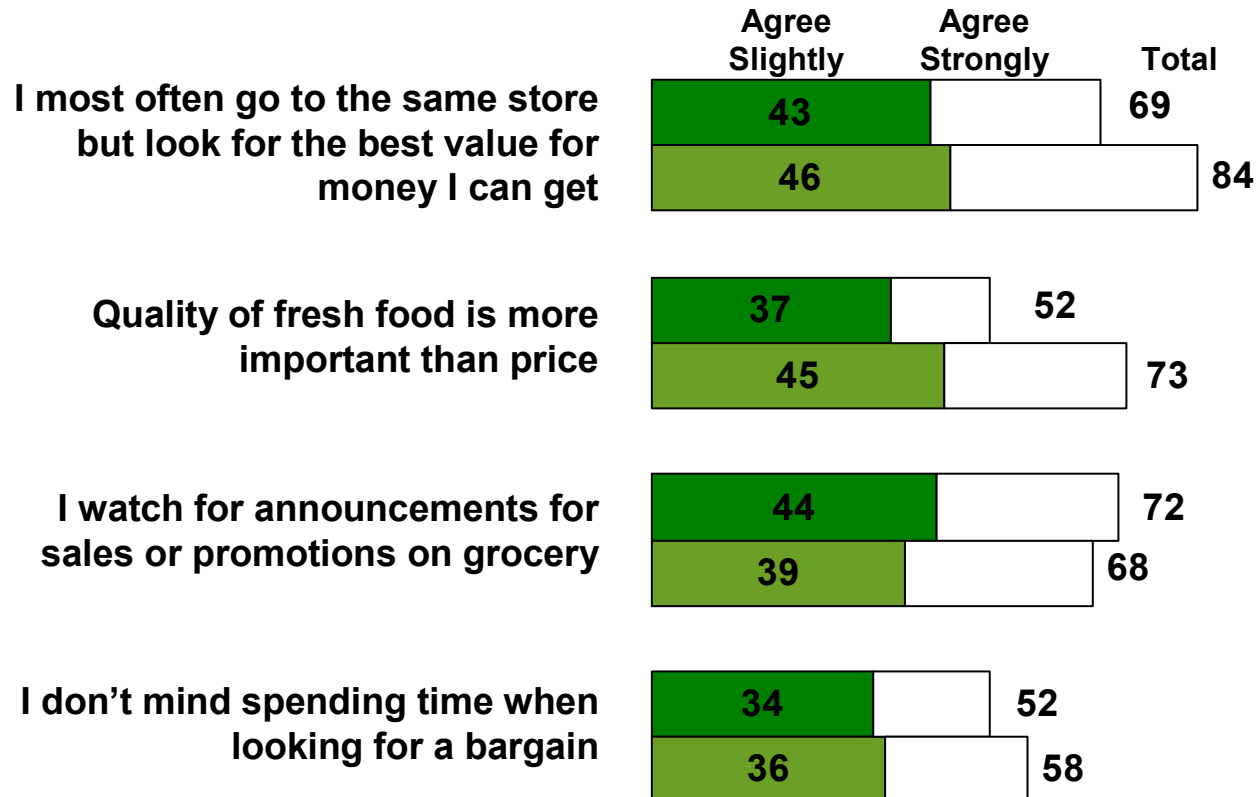
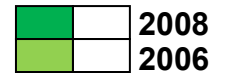
(Base: All main responsible for grocery shopping – 2006 - 54%, 2008 – 47%)



 () = Total French Population

Price becoming more important

(Base: All Adults 18+ - France)

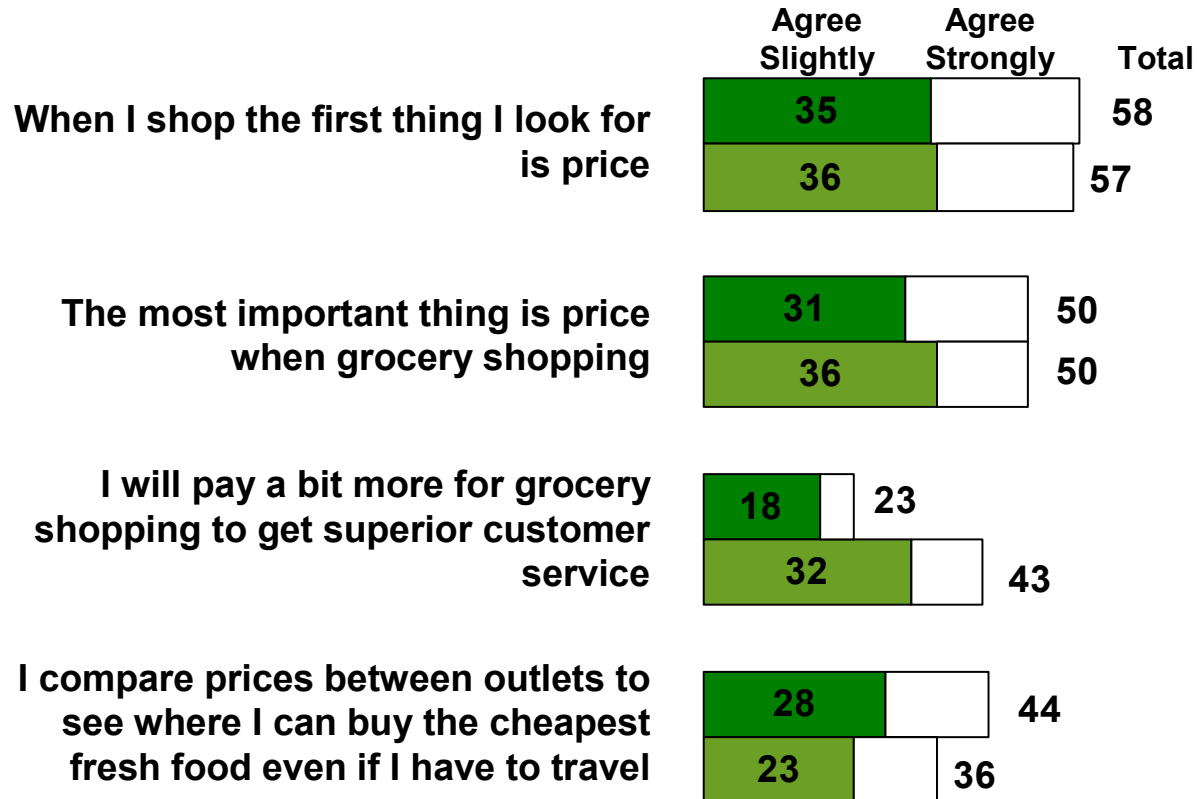
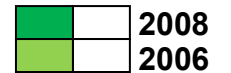


Older French Consumers (45+yrs) are more likely to agree that quality is more important than price. Younger consumers are more conscious of price and more likely to look for sales or promotions.



Price becoming more important

(Base: All Adults 18+ - France)

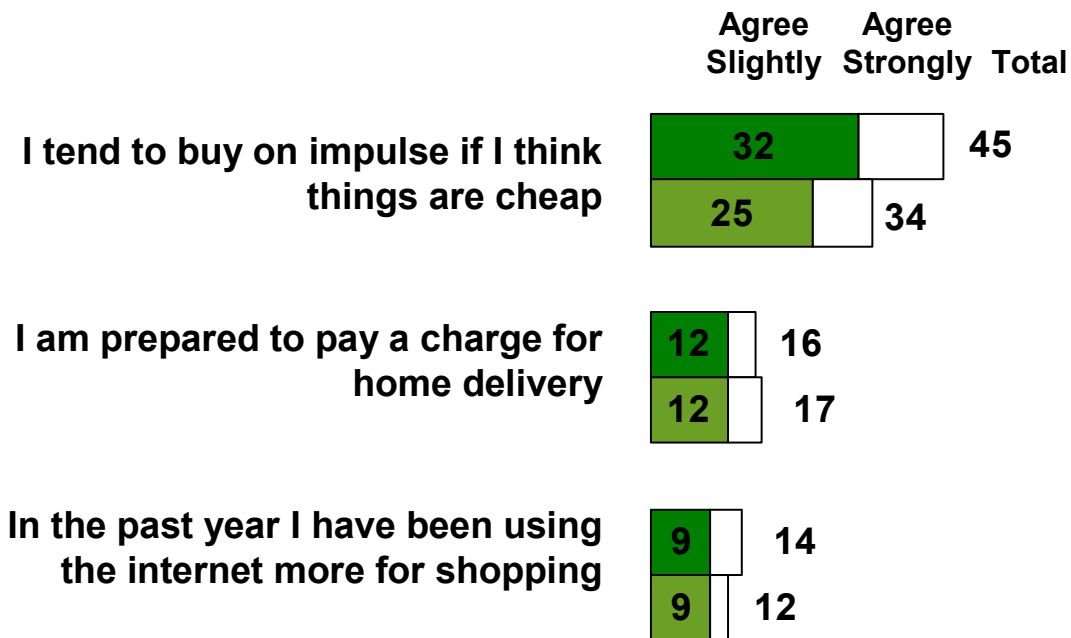
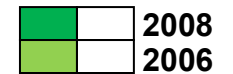


Females and younger consumers (18-44yrs) place more emphasis on price when grocery shopping.



Internet shopping still low

(Base: All Adults 18+ - France)



Impulse buying is stronger among younger consumers (18-34yrs). Males and 18-24 year olds show somewhat increased usage of internet shopping.



Strong pester power & private label

(Base: All Adults 18+ - France)

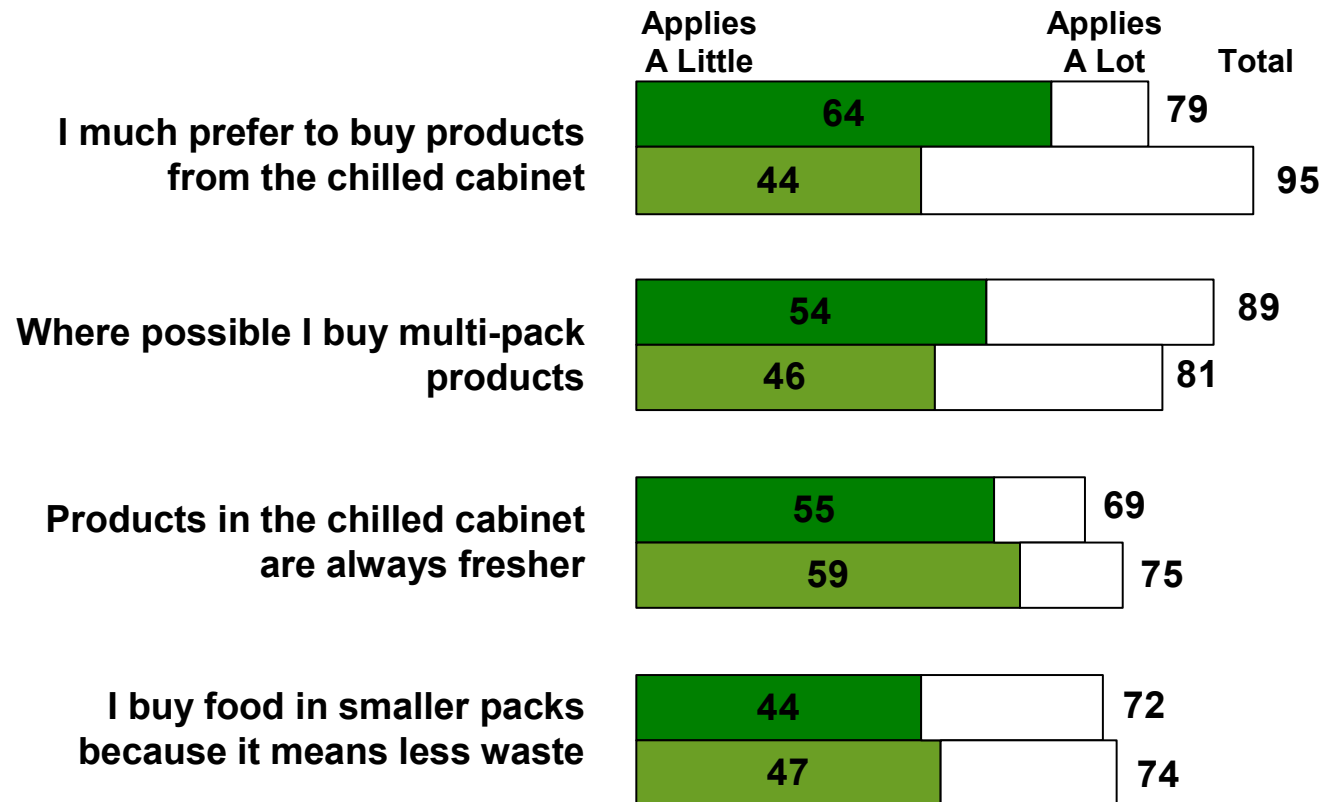
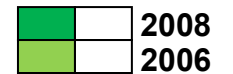


Females are more likely to give into pester power from their children than males.

* New question added 2008
+ Base: Those with children

Less positive about chilled cabinet

(Base: All Adults 18+ - France)

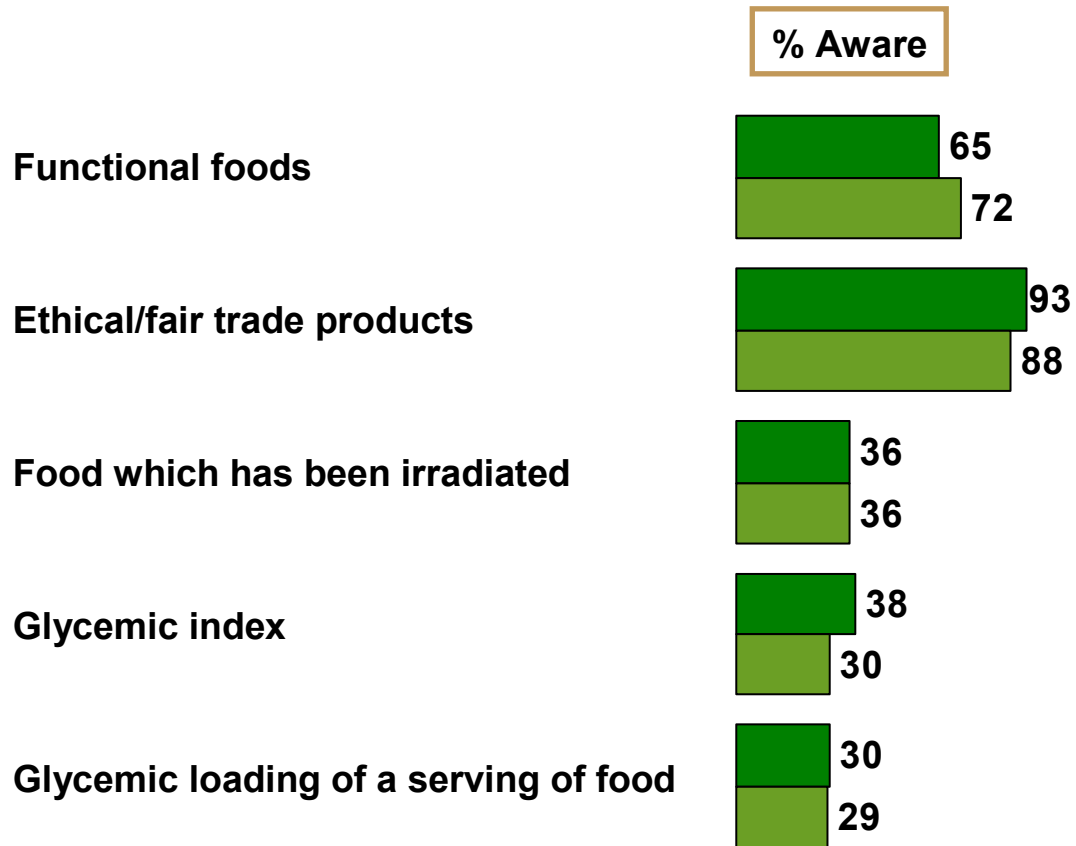


Younger consumers (18-34yrs) and females are more likely to purchase multi-packs. They also have a stronger preference for chilled products.



Strong awareness of fair trade

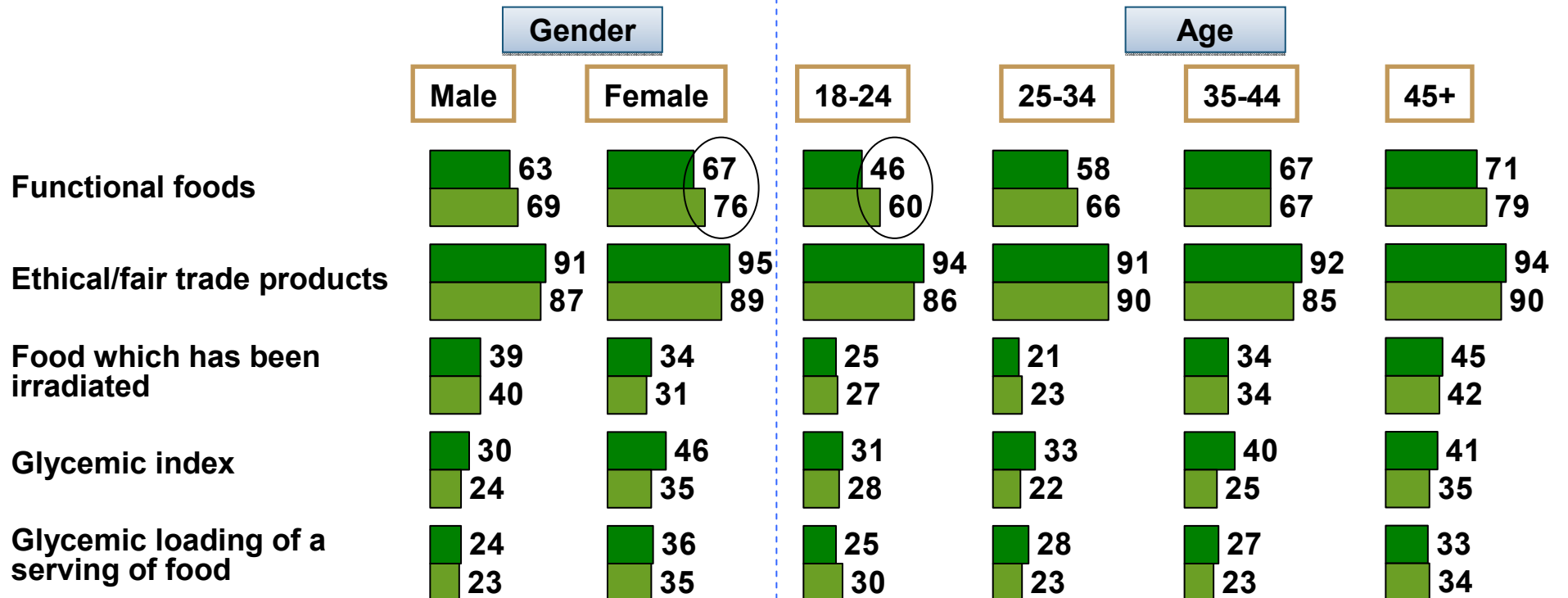
(Base: All Adults 18+ - France)



Decline in awareness of functional food

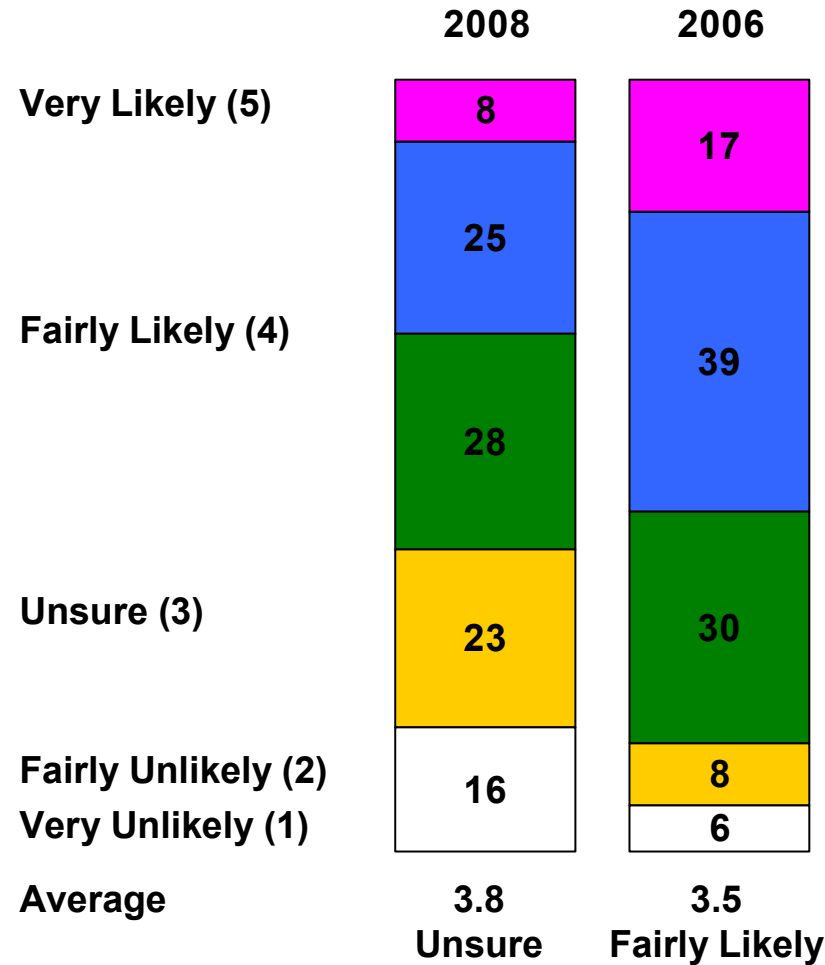
(Base: All Adults 18+ - France)

2008
2006



Likelihood to purchase functional foods weakened

(Base: All Adults 18+ - France)



Females and older consumers (45+yrs) show stronger likelihood to purchase functional foods.



SECTION 7: Local Food



Attitudes towards local food summary points

- ◆ **Local food is important to French consumers. However, there has been a slight decline in frequency of purchasing local food.**
 - **Younger French consumers (under 45 years) see local food as less important and purchase it less frequently.**

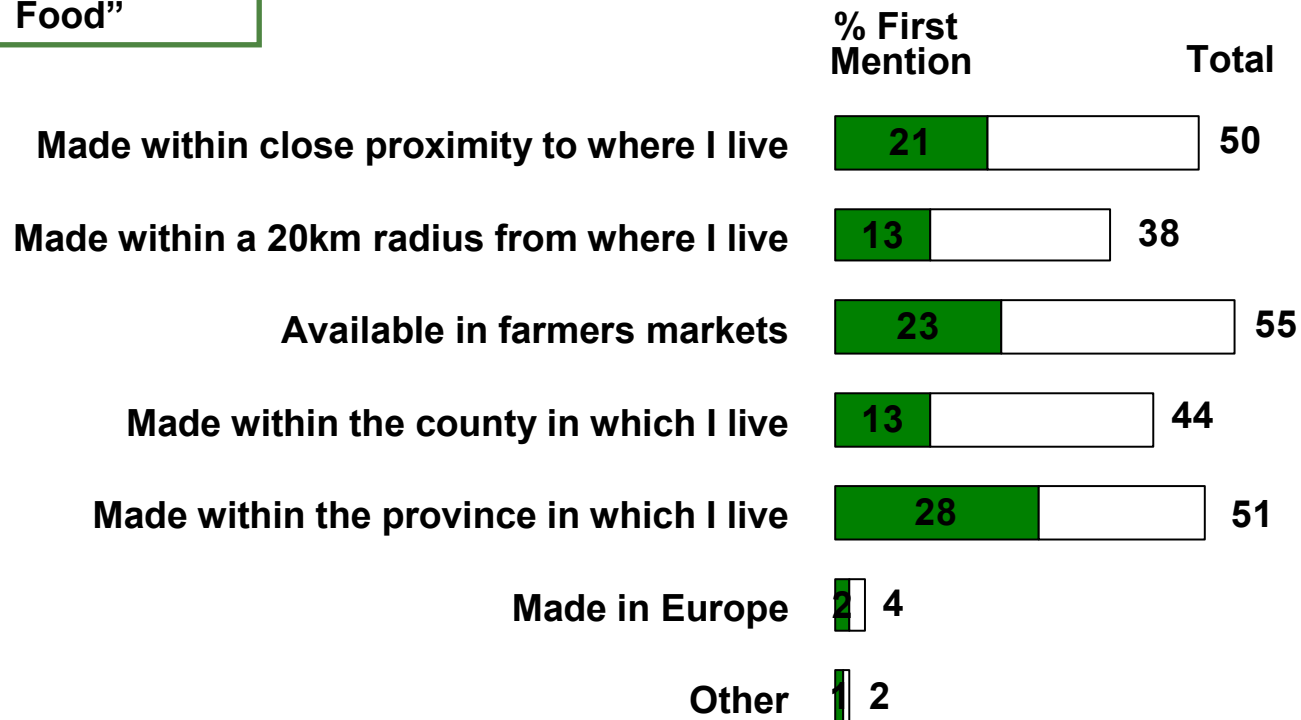
- ◆ **French consumers like to know where their food comes from and tend to look for meat which is fully traceable. Local food is seen as fresher and of better quality.**
 - **Younger consumers especially 18-24 year olds are less concerned about where their food comes from.**



Local food is from the locality, the local market or within the province

(Base: All adults 18+ Years)

Understanding of the Term "Local Food"

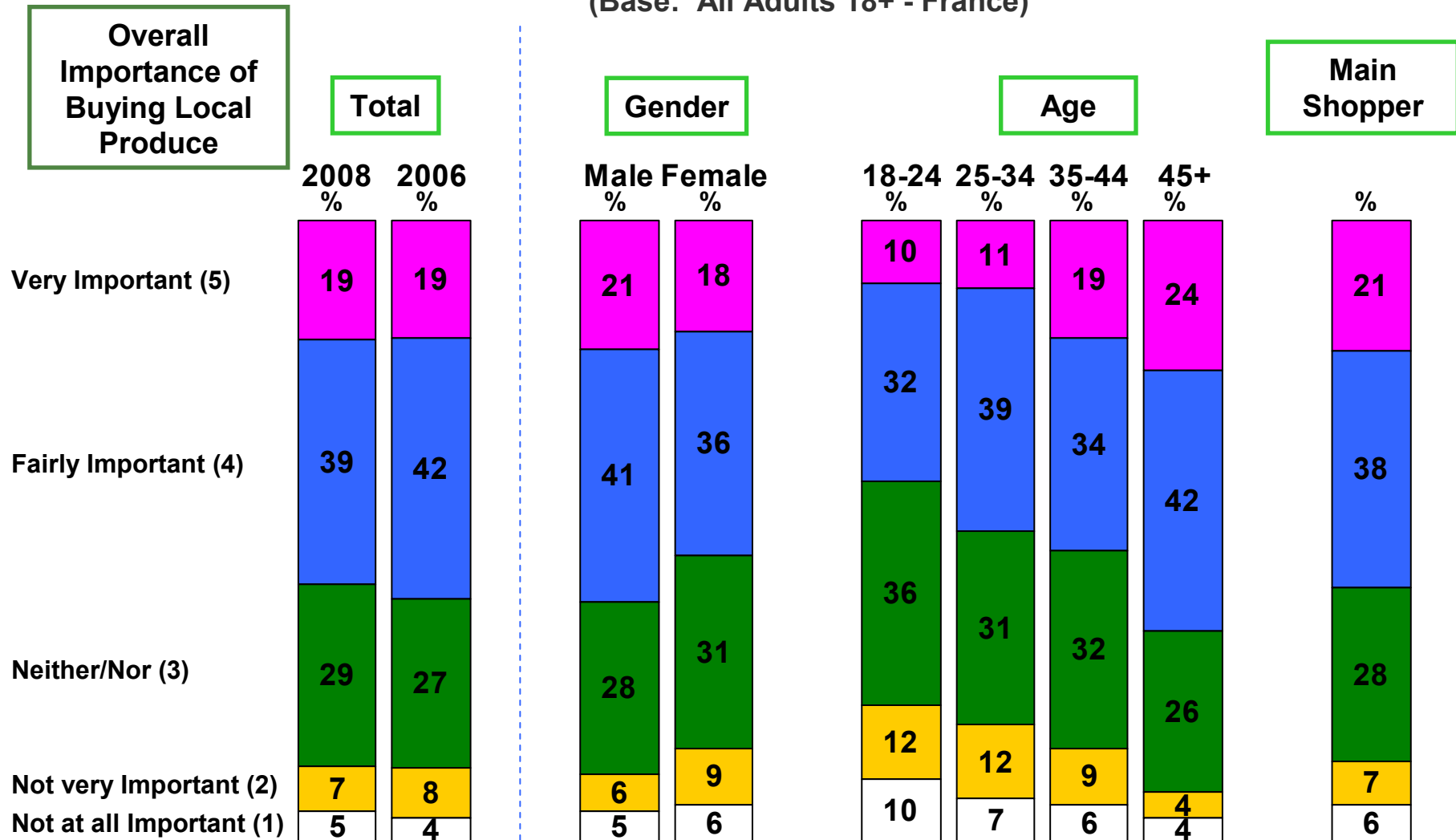


Females and older consumers (45+yrs) are more likely to describe local food as coming from the local market.



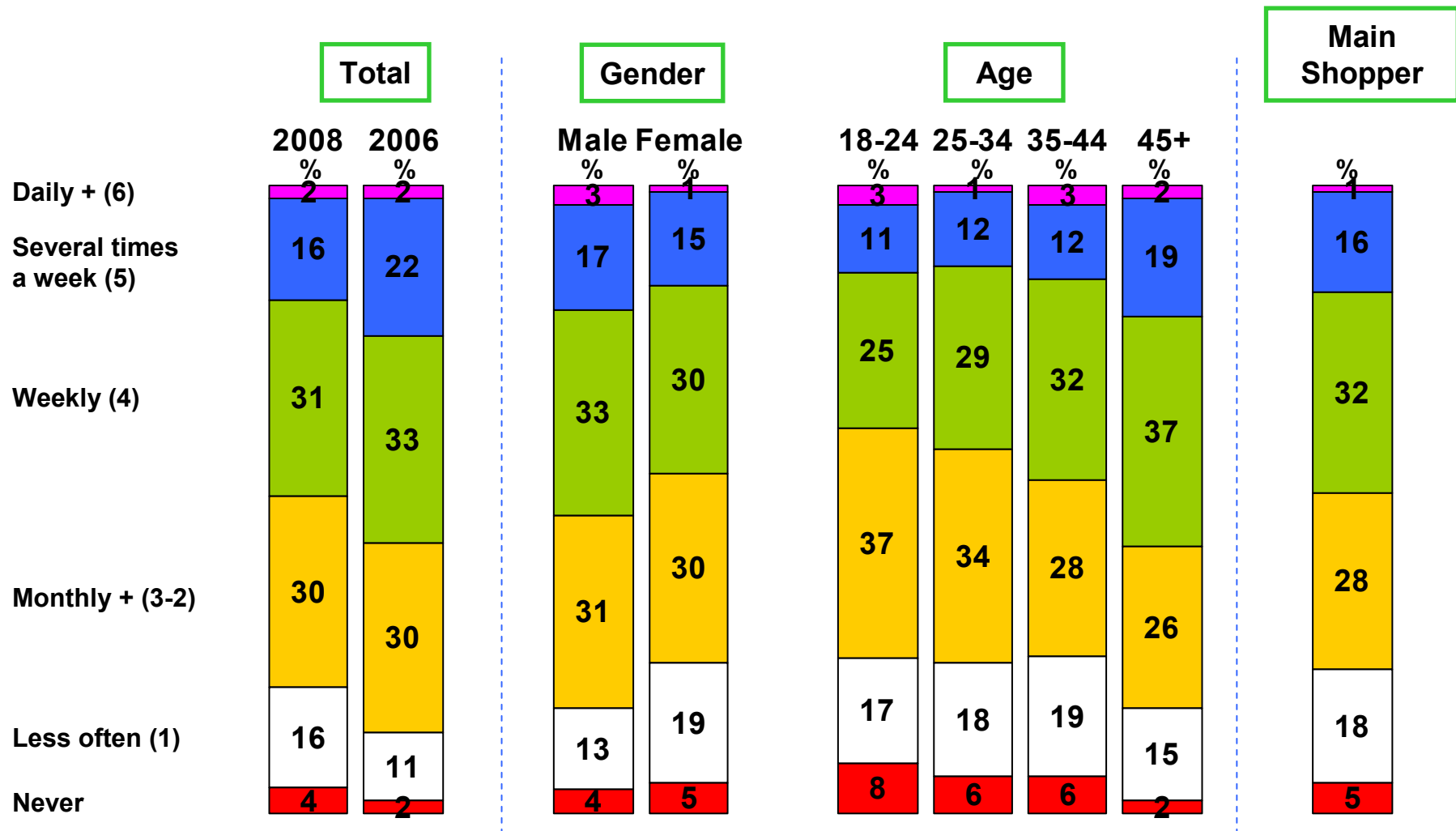
Purchasing local produce remains important

(Base: All Adults 18+ - France)



Decline in frequency of purchasing local produce

(Base: All Adults 18+ - France)

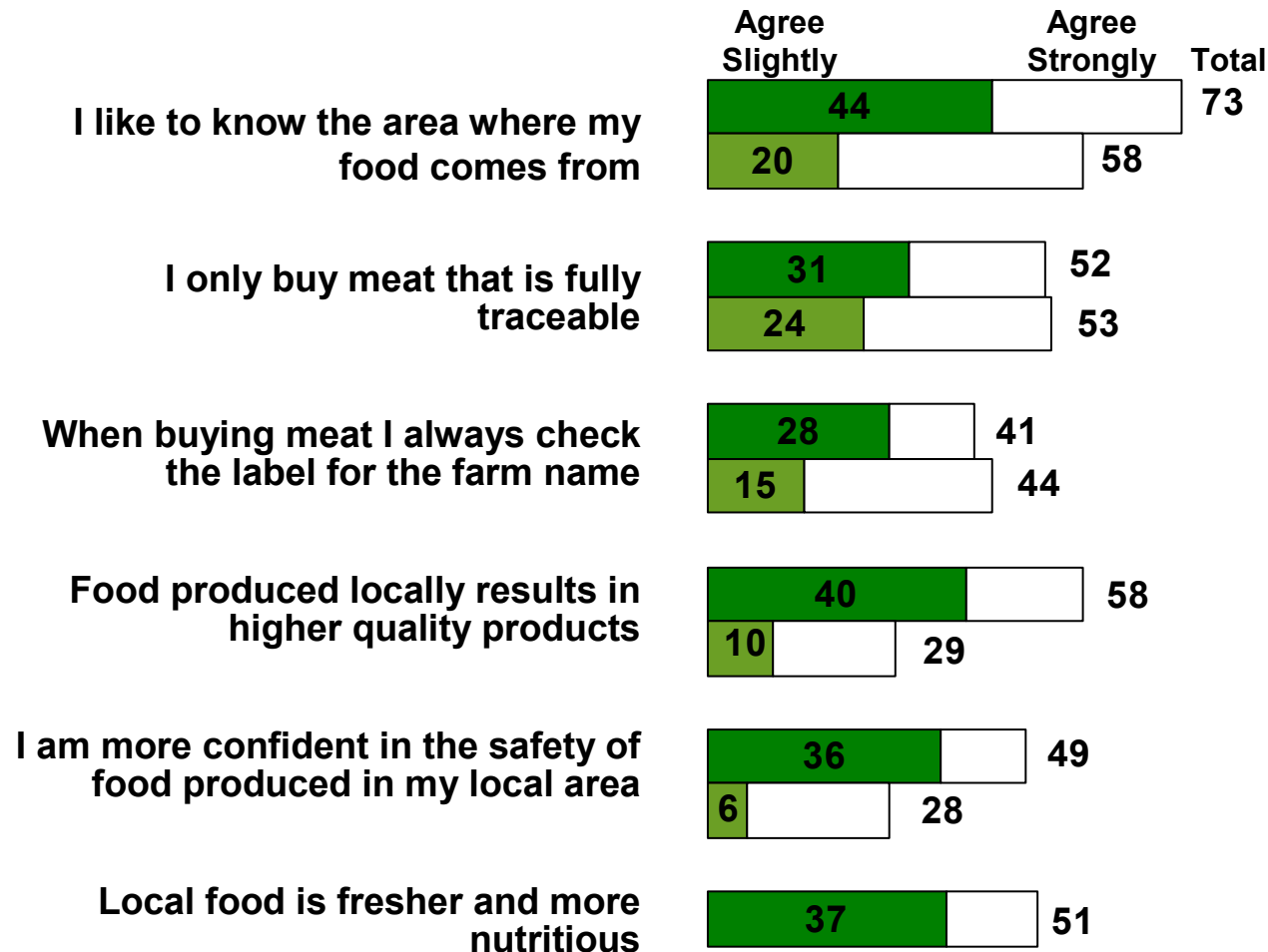
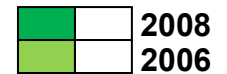


Frequency of purchasing local produce is stronger among the older age groups (45+ yrs).



Increased importance for origin and local

(Base: All Adults 18+ - France)



Females are more likely to check meat labels for the farm source and believe local food is fresher and better quality. Younger consumers especially 18-24 year olds are less concerned about where their food comes from.



SECTION 8: Food Labelling



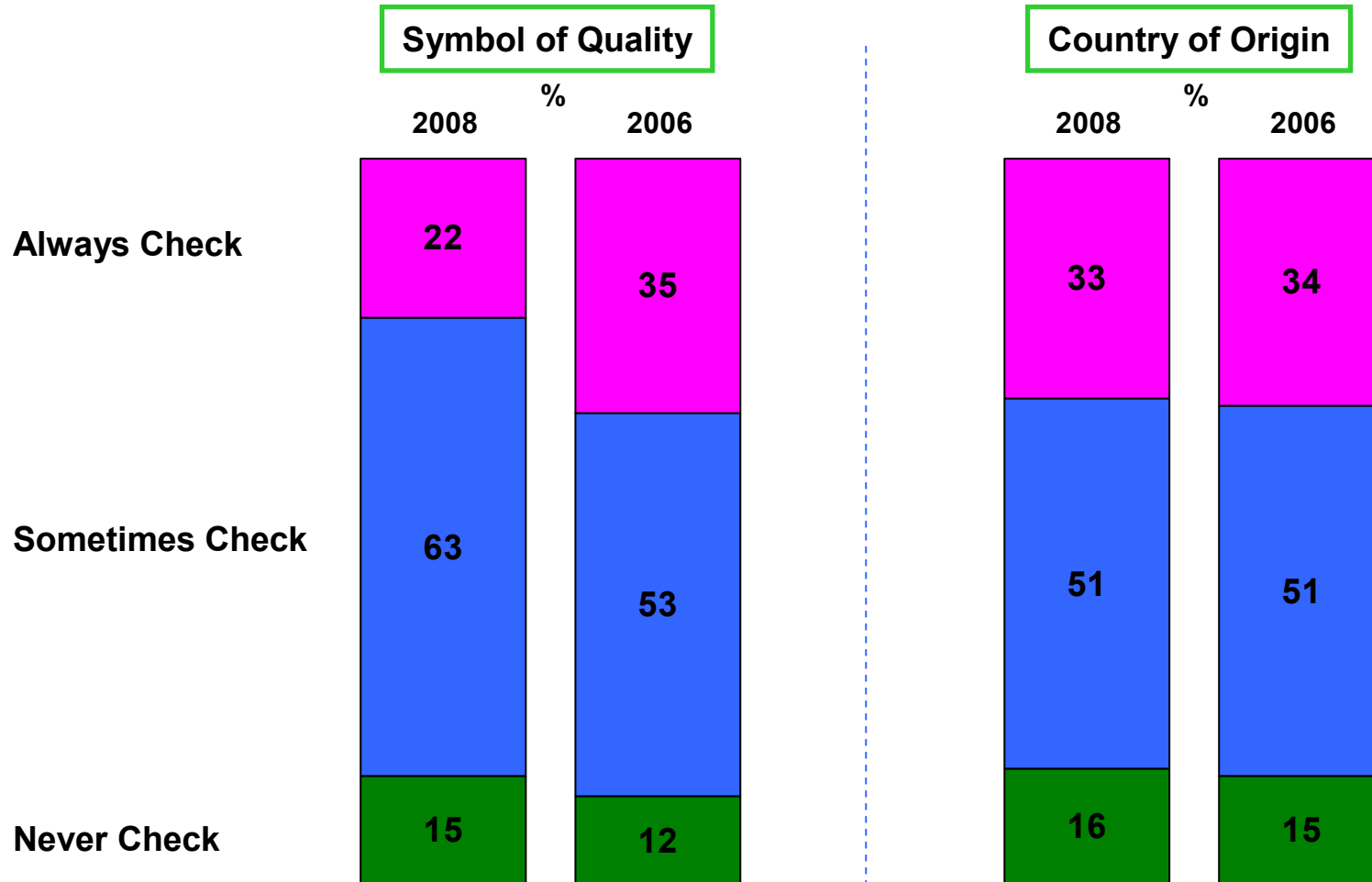
Food Labelling

- ◆ **French consumers are less likely to always check for a symbol of quality but they remain constant in checking the country of origin of food products.**
- ◆ **Including 'Fresh' on a label is very important to the French. Fresh is associated with Fruit and Vegetables and products free from preservatives.**
- ◆ **Natural is also important and implies that a product is unrefined/unprocessed and free from artificial ingredients/preservatives and colours.**



Decline in checking of quality symbol

(Base: All Grocery Shoppers)



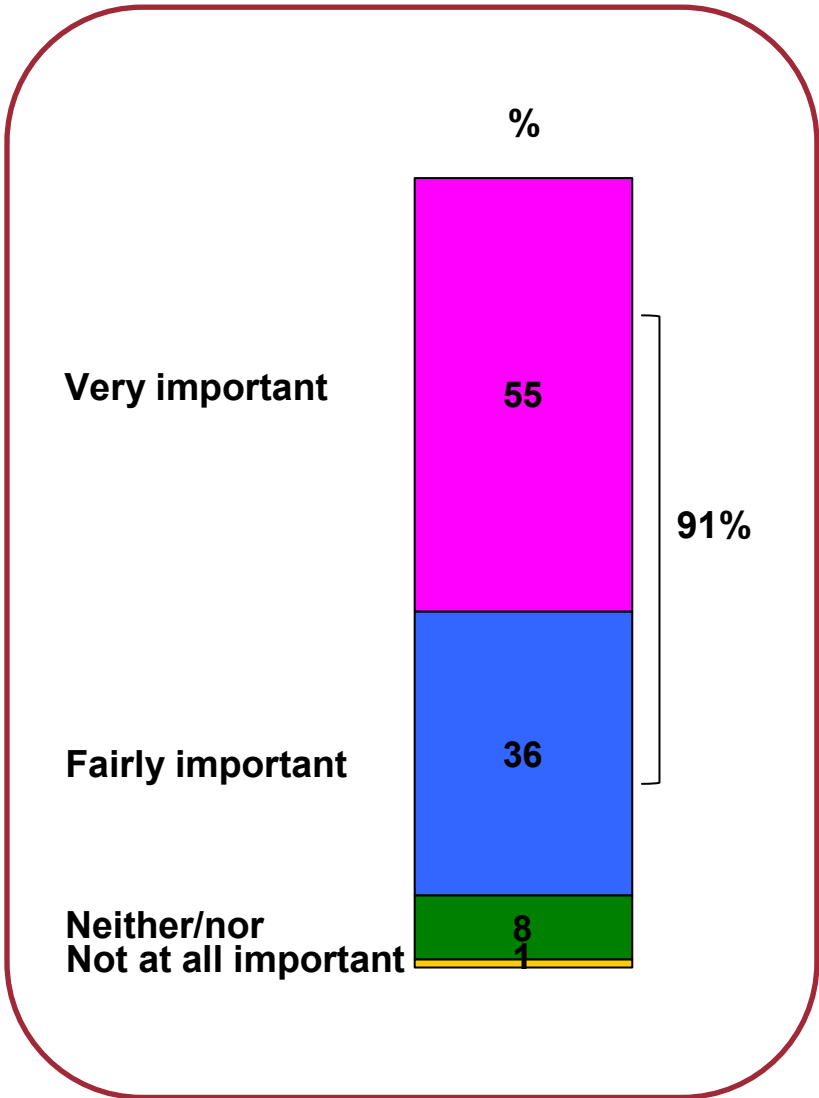
Older consumers are more likely to always check the country of origin.



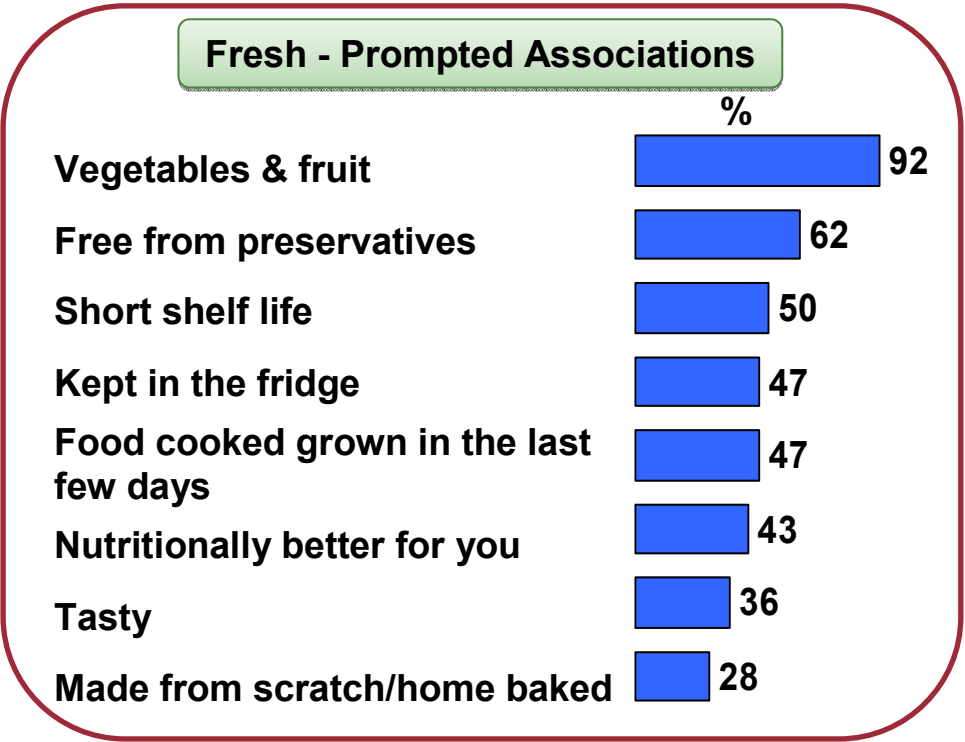
'Fresh' is important on a label

(Base: All adults 18+ Years)

Impact of 'Fresh' on Labels when Shopping



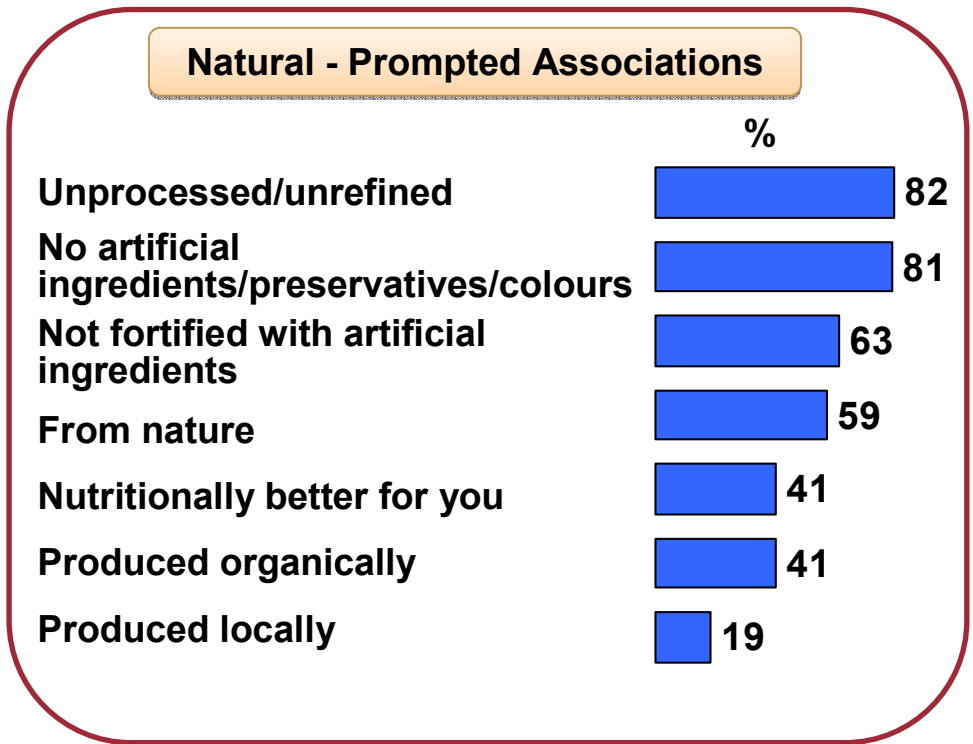
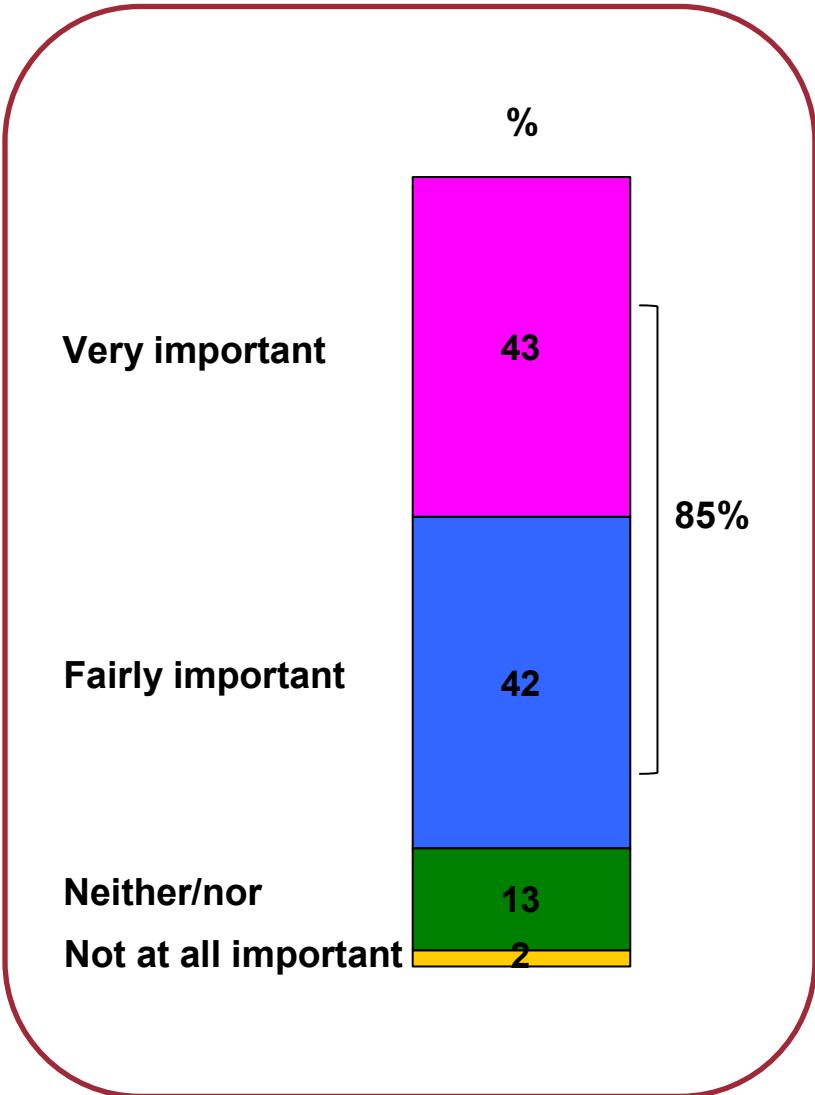
Fresh - Prompted Associations



'Natural' is important too

(Base: All adults 18+ Years)

Impact of 'Natural' on Labels when Shopping



18-24 years olds see 'natural' as less important.



SECTION 9: Attitude Towards Alcohol



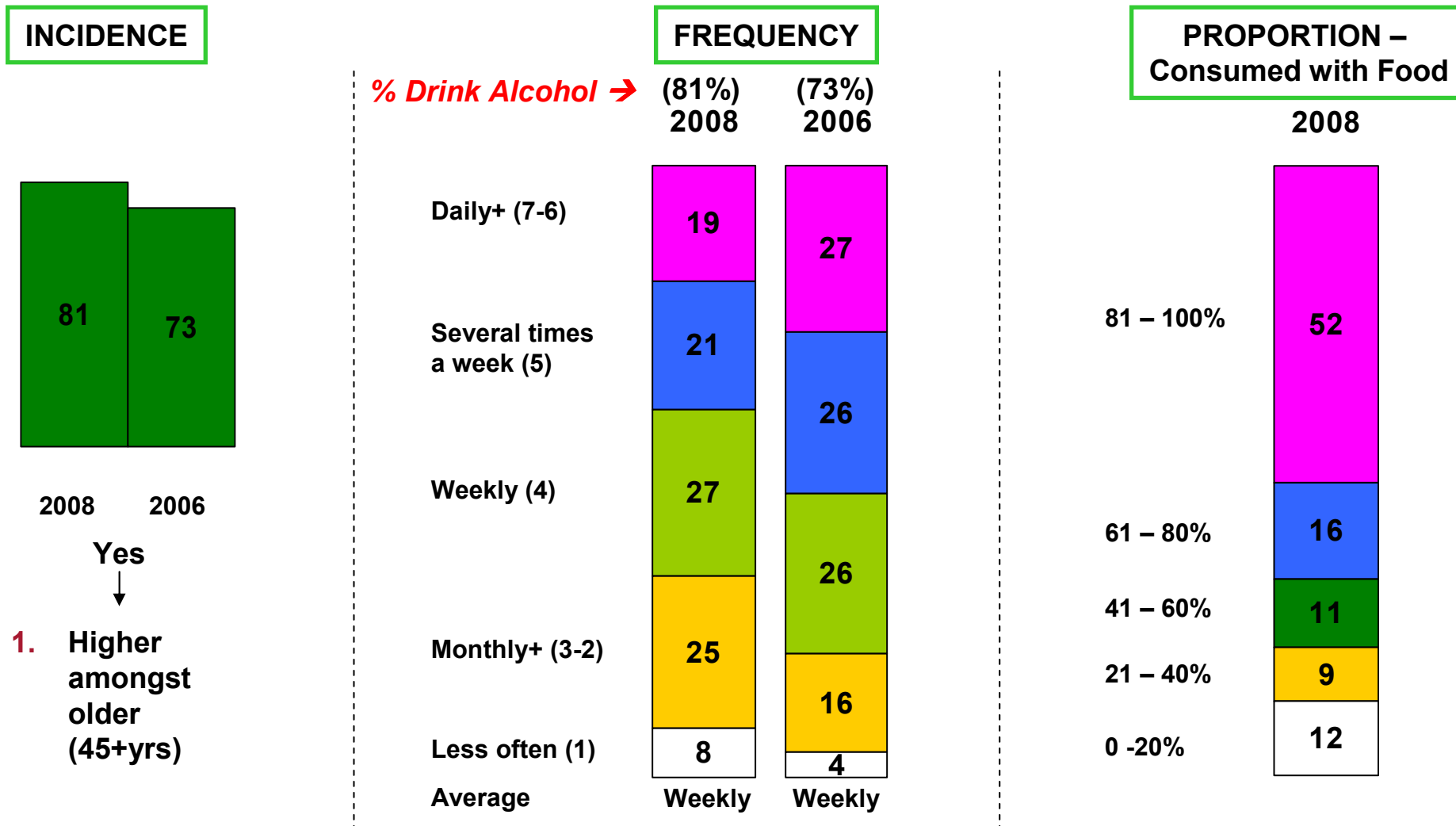
Attitudes towards alcohol summary points

- ◆ **Incidence of drinking alcohol has increased in France but frequency of drinking has declined.**
 - **Older French (45+ years) drink more frequently and are more likely to drink with food. Younger French are more likely to drink without food.**
 - **Drinking at home seems to have reduced, with the exception of 18-24 year olds who are more likely to report that they drink more often at home.**
 - **Alcohol is mostly drunk when at a restaurant with dinner or while dining at home at the weekends.**



Increased incidence of drinking alcohol but frequency declining

(Base: All Adults 18+ - France)



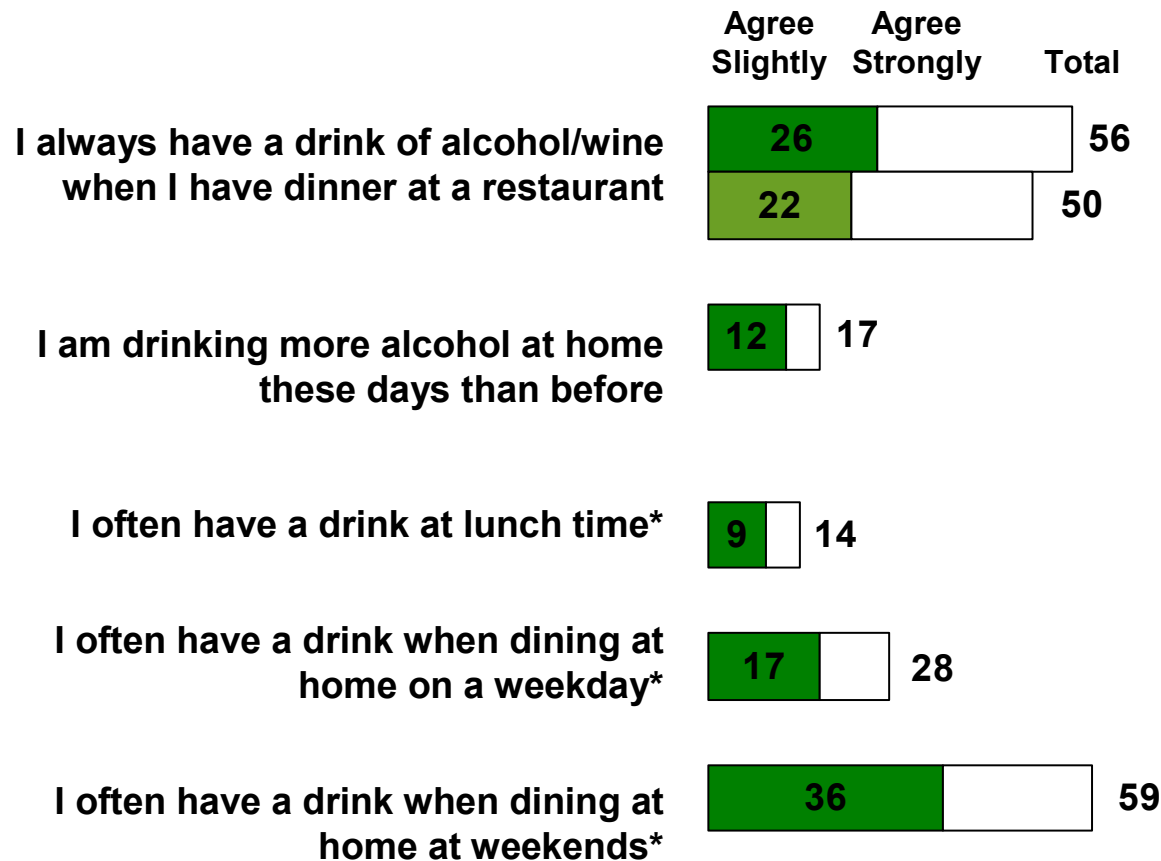
Yes
↓
1. Higher amongst older (45+yrs)

Older consumers (45+) drink alcohol more frequently and are more likely to drink alcohol with food.



Alcohol more associated with dinner and weekends

(Base: All who drink alcohol)



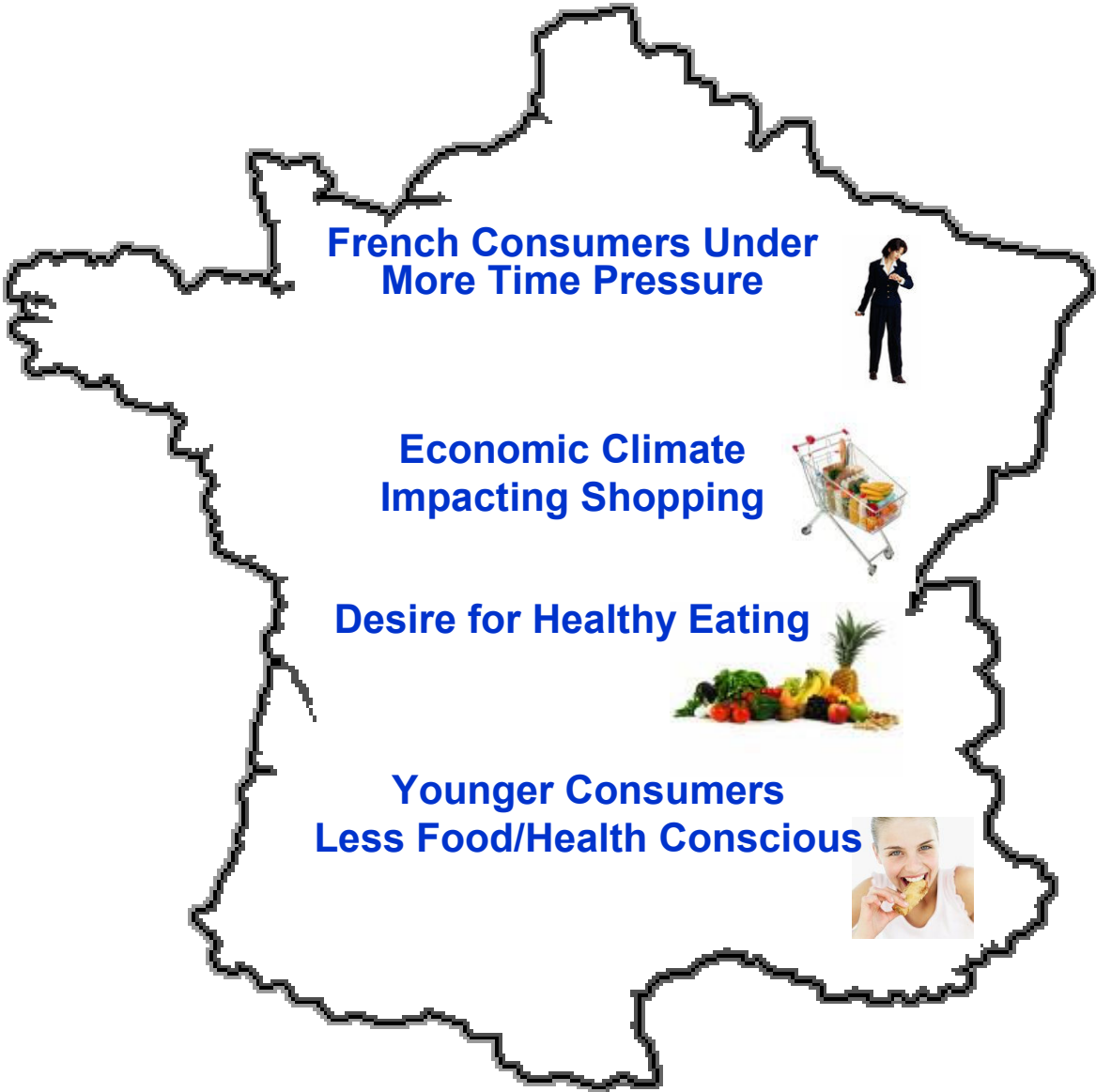
Older consumers (45+) and males are more likely to agree with all of the alcohol statements, with the exception of drinking from home. Over one-third of 18-24 year olds report drinking more alcohol from home than before.

 * New question added 2008

Study Summary



Key Lifestyle Trends



French consumers under more time pressure

- ◆ French consumers appear more stretched for time than in 2006; dinner is often a last minute choice and there is a stronger interest in foods that are quick to prepare and cook.
- ◆ The frequency of cooking meals from scratch has decreased and there has been an increase in purchasing of ready to eat foods, prepared sandwiches and convenience meals.
- ◆ While still very passionate about their food and cooking, routine cooking may be a bit of a chore for some.
- ◆ French consumers are shopping less frequently than in 2006– more on a weekly basis.

Economic climate may impact French shopping habits

- ◆ There is increased concern about the price of grocery items, especially amongst younger shoppers (under 45 years).
- ◆ Younger consumers are more likely to trade off quality of fresh foods for price.
- ◆ There has been an increase in price comparison shopping and a small increase in interest in sales promotions.



Desire for Healthy Eating

- ◆ French consumers have a healthy attitude to food and eating.
- ◆ Food is seen as very important to overall health and wellness.
- ◆ French consumers check labels for nutritional content and are conscious of the fat content of products.
- ◆ Healthy methods of food preparation are used most such as steaming, stir frying, uncooked and baking/roasting foods.

Younger French consumers – are they less food conscious?

- ◆ Younger French consumers (18-24) have weaker cooking skills and have few cares about the impact of food on their health.
- ◆ Increase in usage of convenience meals is strongest among younger consumers.
- ◆ Lower awareness of the impact of food on mental health and of its nutritional benefits.
- ◆ Quantity of food is seen as key to weight issues versus the quality of food.
- ◆ Younger consumers are more interested in price than quality when it comes to fresh food.



Looking for when they shop....

French consumers are looking for healthy choices but taste is very important to them.

- ◆ **Taste is the first thing they look for when preparing food. They are also looking for products that are quick to cook and prepare.**
- ◆ **French consumers appear a little less enthusiastic about low fat products than in 2006; functional foods and enriched foods are also somewhat less popular than in 2006.**

Portable/on the go food products may have increased potential.

- ◆ **There has been an increase in eating food prepared outside of home among the French.**
- ◆ **More takeaway meals are being eaten and there is increased incidence of eating in the car, and at work more are eating at their desk.**
- ◆ **Prepared foods from deli counters are also on the increase.**



Looking for when they shop....

What's on the label?

- ◆ The French are very aware of the nutritional content of food and are more confident in understanding labels than in 2006. They check for country of origin (especially for meat) and are particularly interested in local food.
- ◆ Adding words such as 'fresh' and 'natural' to a label are very important to French consumers. Fresh implies products that are free from preservatives, while natural implies products that are unrefined /unprocessed and free from artificial colours, flavours and preservatives.
- ◆ Awareness of environmental issues is strong and French consumers look for recycled/recyclable packaging when possible.
- ◆ Sustainability is the key buzzword to use rather than Carbon Footprint or Food Miles. Nine out of ten French consumers are aware of Sustainability and one-third claim it has an impact on their shopping habits.




Appendix (1)

- ◆ **PERIscope is Bord Bia's biennial study that has been tracking the Irish, British and Northern Irish consumer since 2001. In 2006 Bord Bia expanded this study to include consumer views from five Continental European countries.**
 - France
 - Spain
 - Sweden
 - The Netherlands
 - Germany
- ◆ **Continental PERIscope provides a detailed perspective on how consumers view food related issues and report their behaviours. The 2008 study expands on the first study undertaken in 2006 and allows us to compare and contrast between countries but also over time. Where possible we have included the Irish, British and Northern Ireland data to highlight differences between the markets.**
- ◆ **The study findings are presented in six booklets, first an analysis and comparison of all countries and then separately findings for each of the individual countries.**



Appendix (2)

- ◆ **A large quantitative study was undertaken through on-line panels of households, thereby effectively and efficiently drawing a nationally representative sample of households across all five countries.**
- ◆ **Quotas were set against age, gender, region and social class, additional weighting was applied to ensure a fully representative sample.**
- ◆ **Although social class by country is outlined within the profile of sample, its definition differs between countries and therefore is not directly comparable, e.g. the French classing system is based on whether the work is derived from the land, from manufacturing or from service.**
- ◆ **The research was conducted amongst a representative sample of adults aged 18+ in France, Germany, Spain, Sweden and the Netherlands.**
- ◆ **A sample size of 1,000+ was obtained for each region to ensure comparable statistically robust data at a national level.**
- ◆ **Fieldwork was conducted on behalf of Bord Bia by**  **during May and June 2008.**

