

Continental PERIscope

European Consumers and their Food

Understanding attitudes in Spain

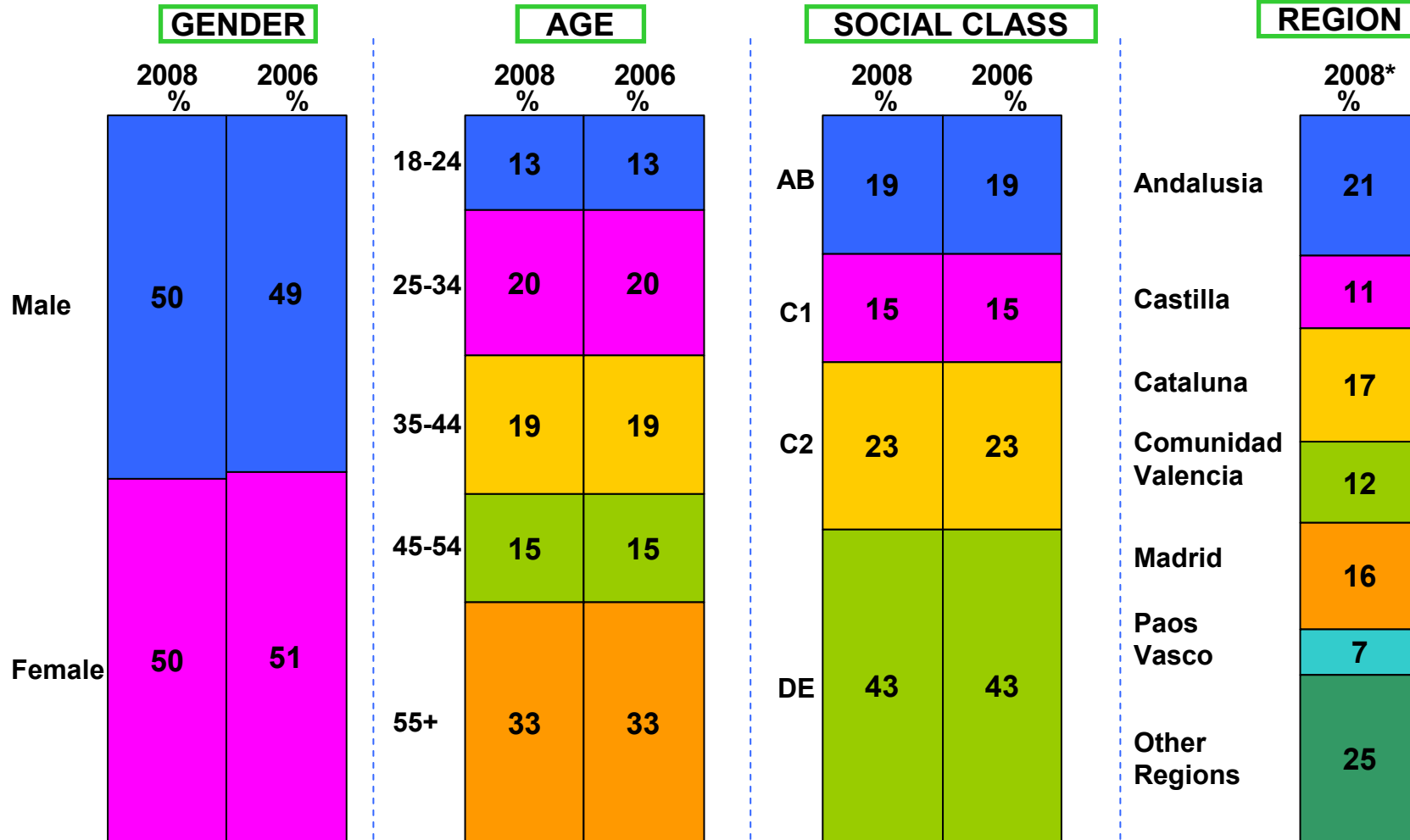


SECTION 1: Profile of Sample



Profile of sample – Spain

(Base: All Adults 18+ - Spain)



Nationally representative population of Spain

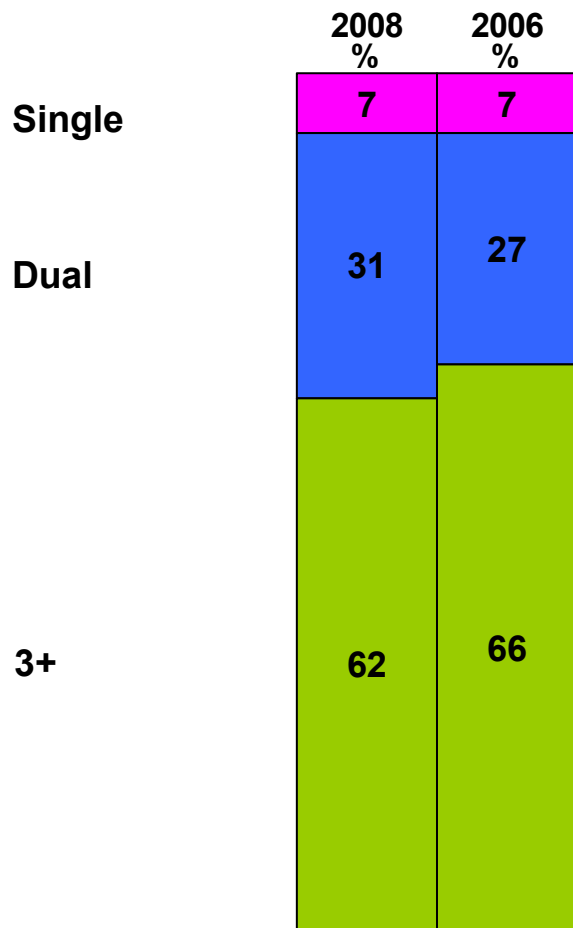


* Other regions 5% or less

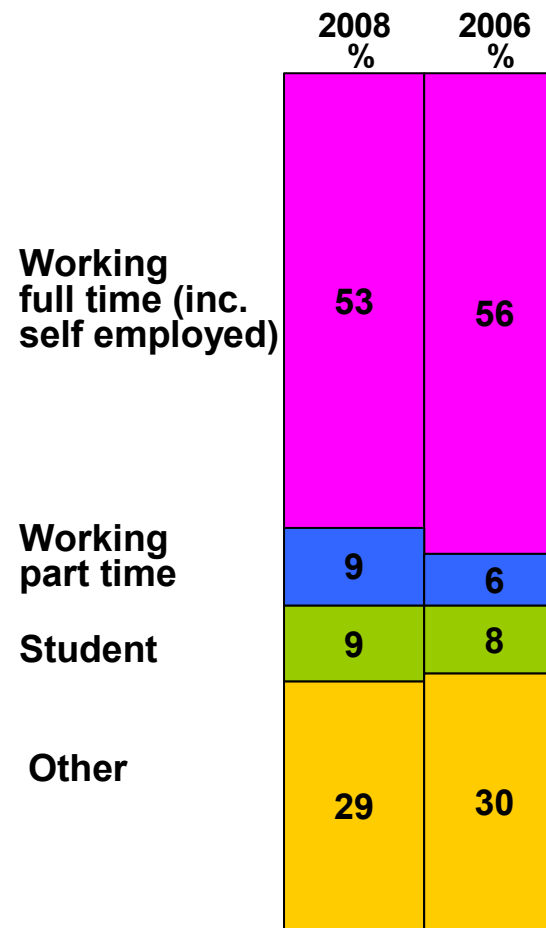
Profile of sample – household composition and work status

(Base: All Adults 18+ - Spain)

HOUSEHOLD COMPOSITION



WORK STATUS



* Other includes housewife, retired, unemployed

SECTION 2: Food & Cooking



Attitude to food & cooking summary points

- ◆ **Consistently high scores evident amongst Spanish for eating a lot of fruit and veg, trying to eat foods low in fat, as well as meat remaining an important aspect within their diet.**
- ◆ **Overall perception of frozen foods being as good as fresh has increased.**
- ◆ **Claimed increase in consumption of nationally made/home grown food, Spanish becoming more conscious of home grown produce.**
- ◆ **The Spanish favour foods that are easy to prepare, one in two eat convenience meals, however, the likes of deli counters are not a key purchase location.**
- ◆ **Evidence of enjoyment of cooking, making an extra effort for special meals, enjoyment of dinner as a family occasion.**
- ◆ **Females show much greater inclination towards cooking, being skilled enough to prepared Sunday dinner or a meal for a dinner party. Male Spaniards are more skilled towards making a simple dinner.**



Attitude to food & cooking summary points

- ◆ **Cooking/preparing a meal from scratch is part of the Spanish lifestyle, six in ten cooking from scratch on a daily basis. There is also an increase in the proportion cooking from scratch – one fifth claim to be doing so more often.**
- ◆ **Over a quarter are consuming ready meals less often – a greater proportion amongst females than males. There is declining agreement that convenience meals are a good substitute for home cooking. They are seen to be expensive and not good value for money.**
- ◆ **Younger Spanish (18-44 yrs) are more stretched for time and are more likely to cook less and use ready meals and convenience foods more.**

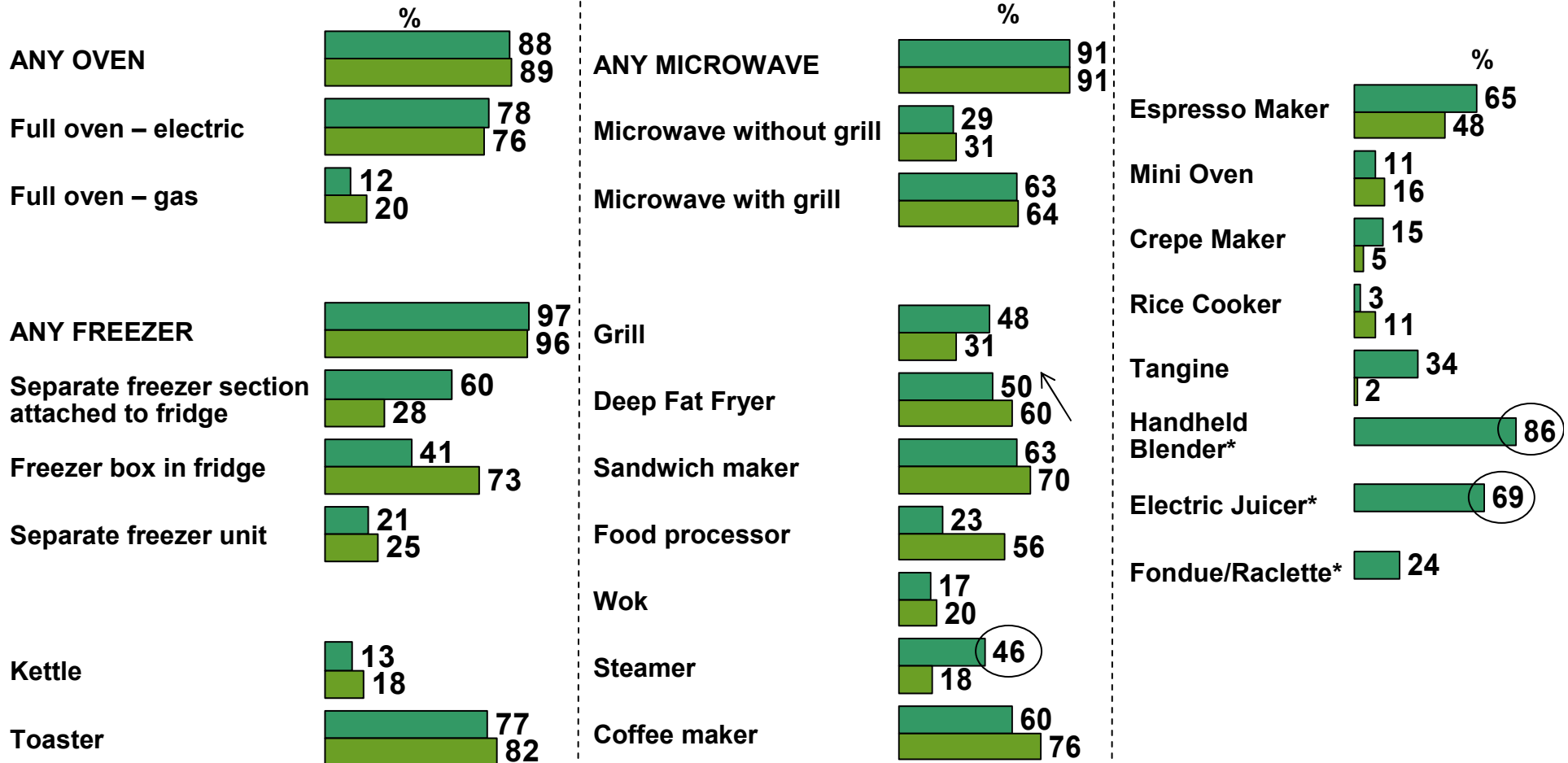


Healthy trends in Spanish kitchen equipment

UTILITY OWNERSHIP IN HOME

(Base: All Adults 18+ - Spain)

2008
2006



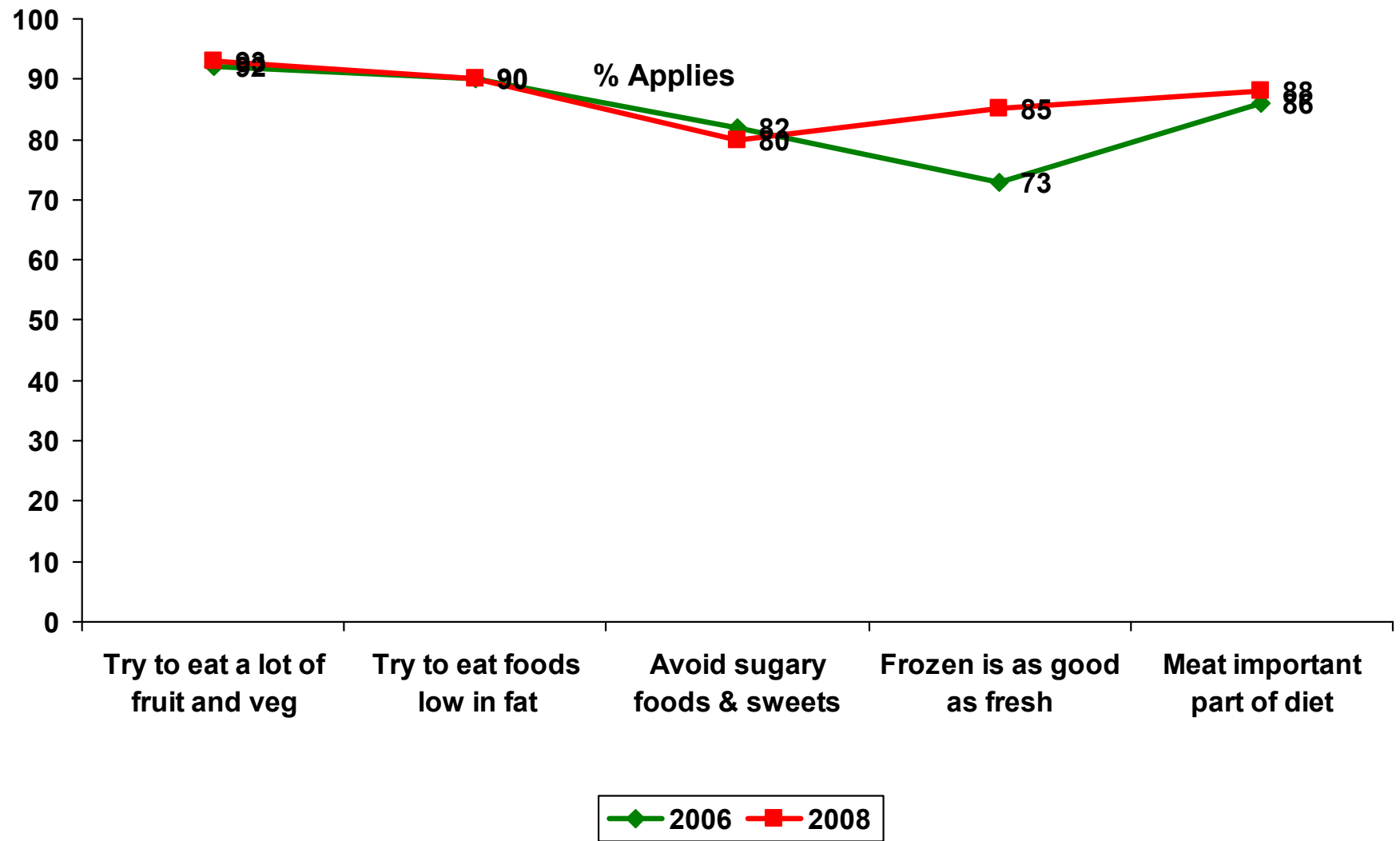
Ownership of a steamer has increased, deep fat fryer in decline and overall high incidence of ownership of handheld blender & electric juicer.



* New question added 2008

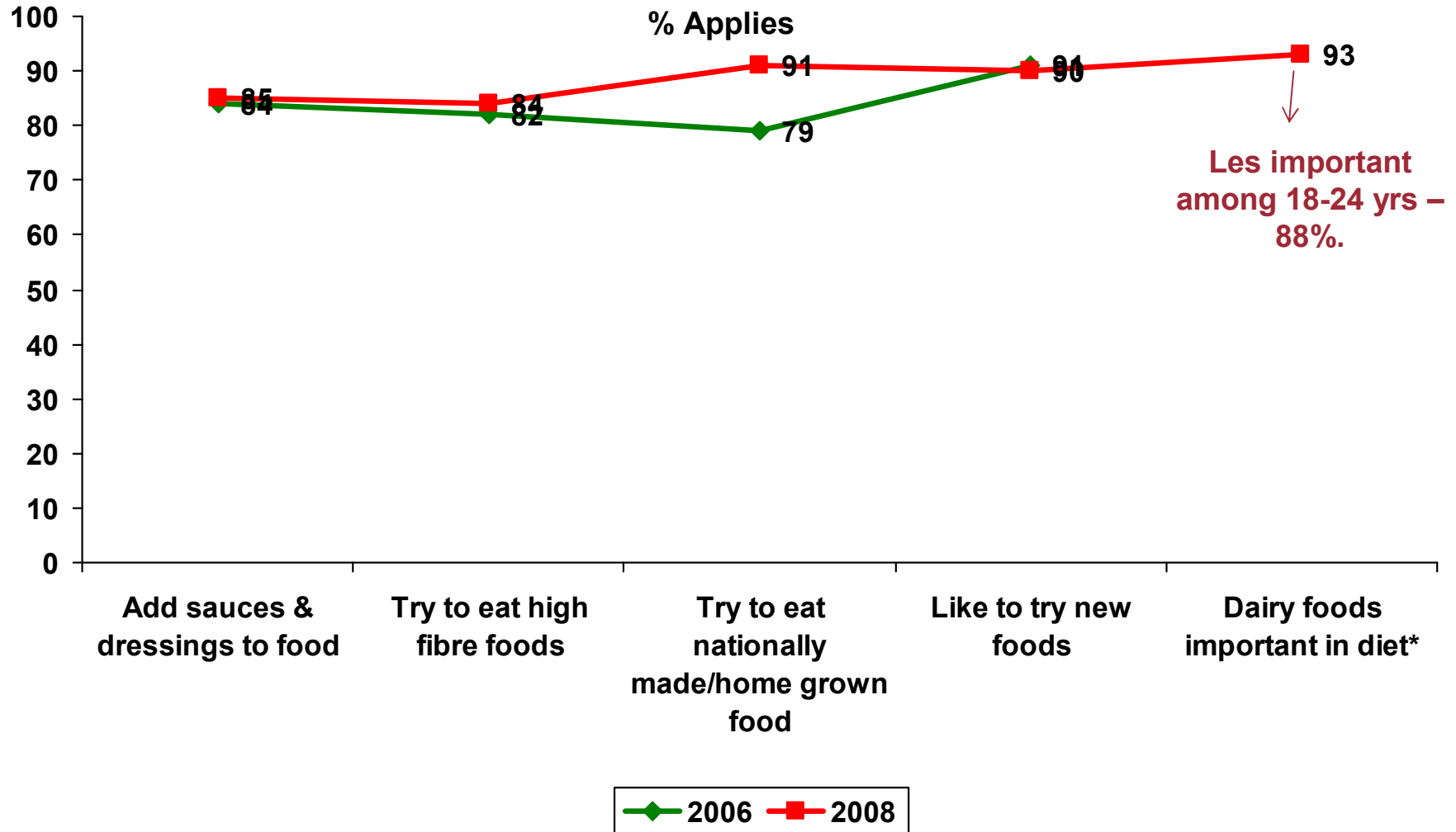
Healthy attitudes

(Base: All Adults 18+ - Spain)



Increased claimed consumption of national produce

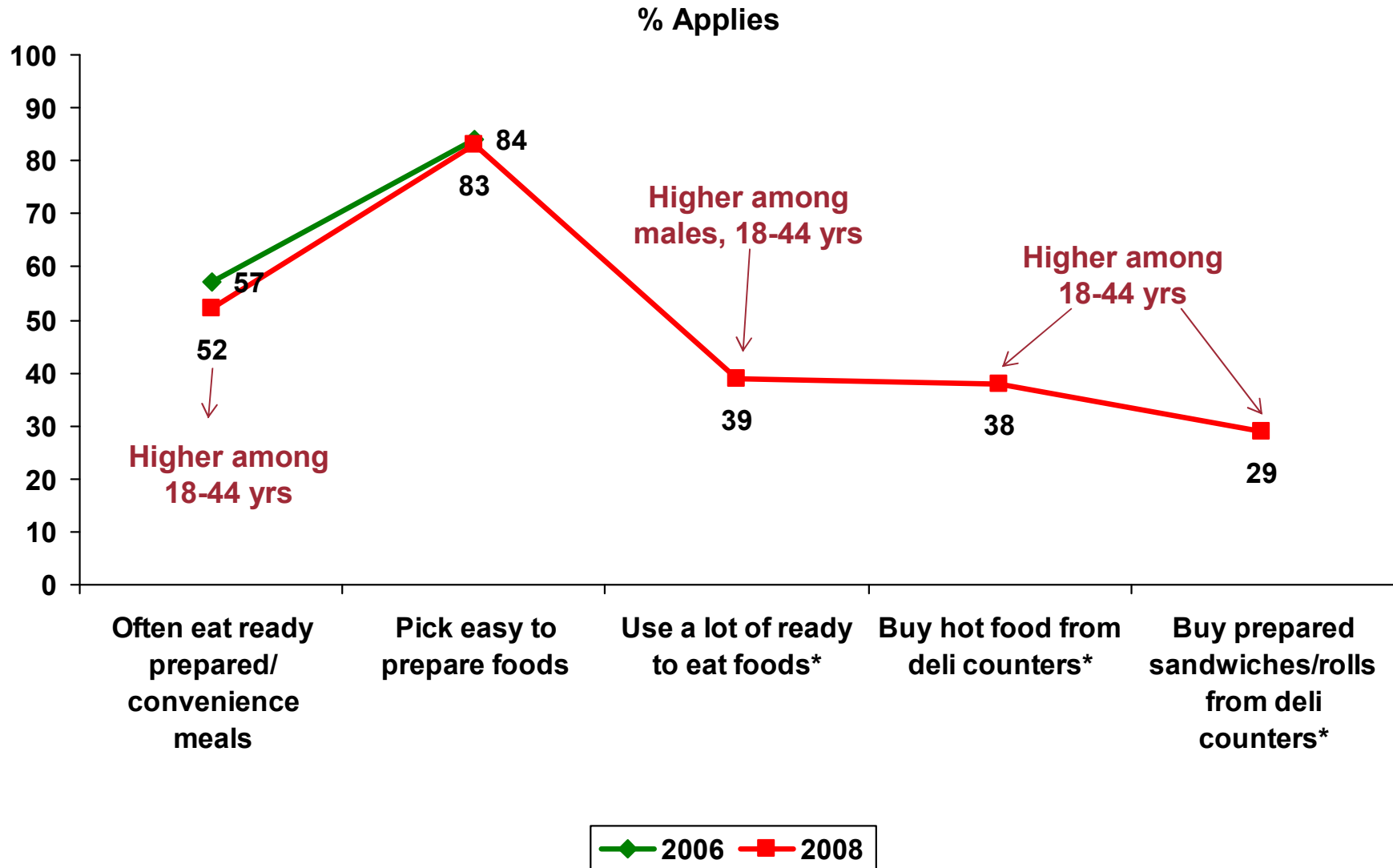
(Base: All Adults 18+ - Spain)



*New attribute added 2008

Younger favouring easy to prepare foods

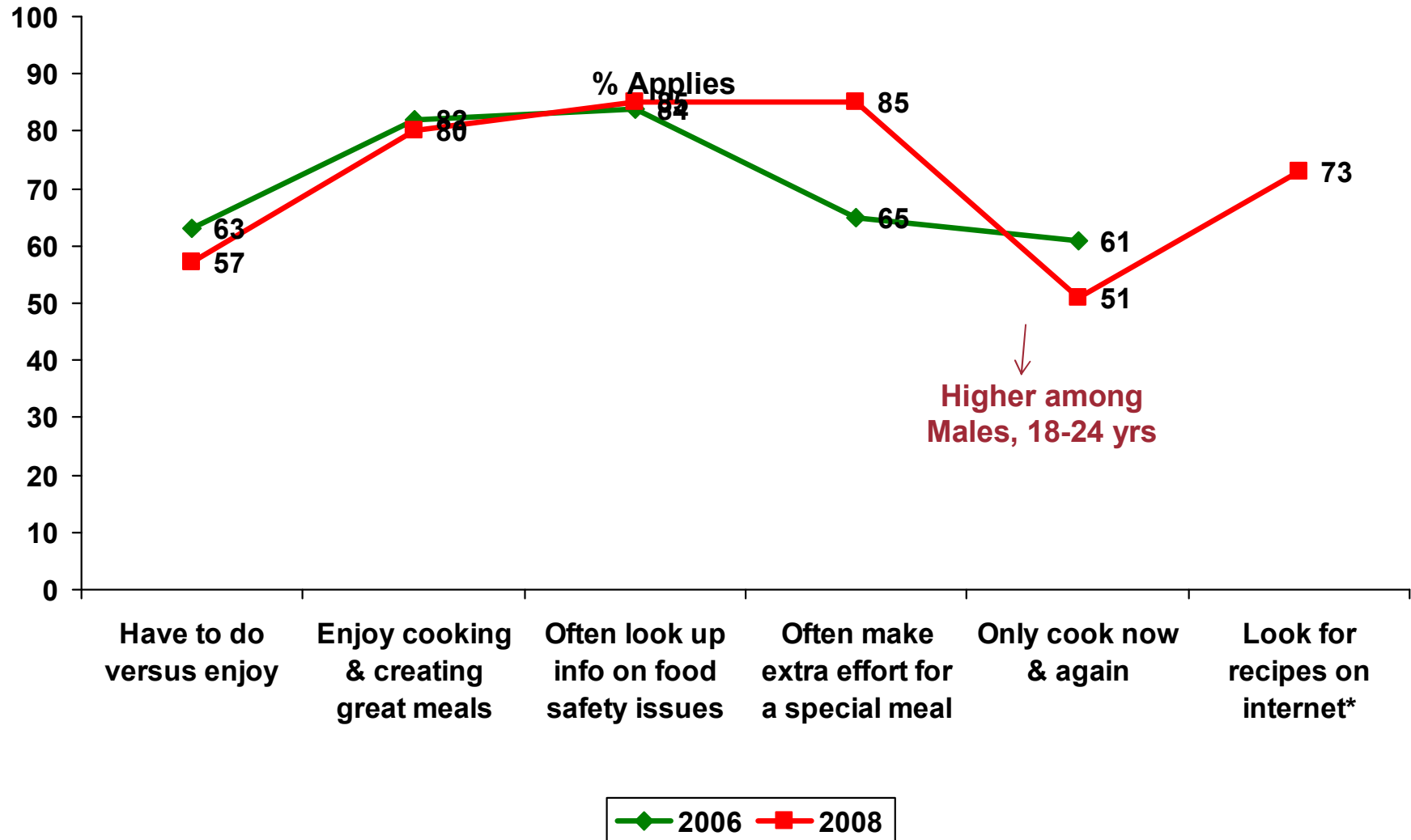
(Base: All Adults 18+ - Spain)



*New attribute added 2008

Enjoy cooking & making extra effort

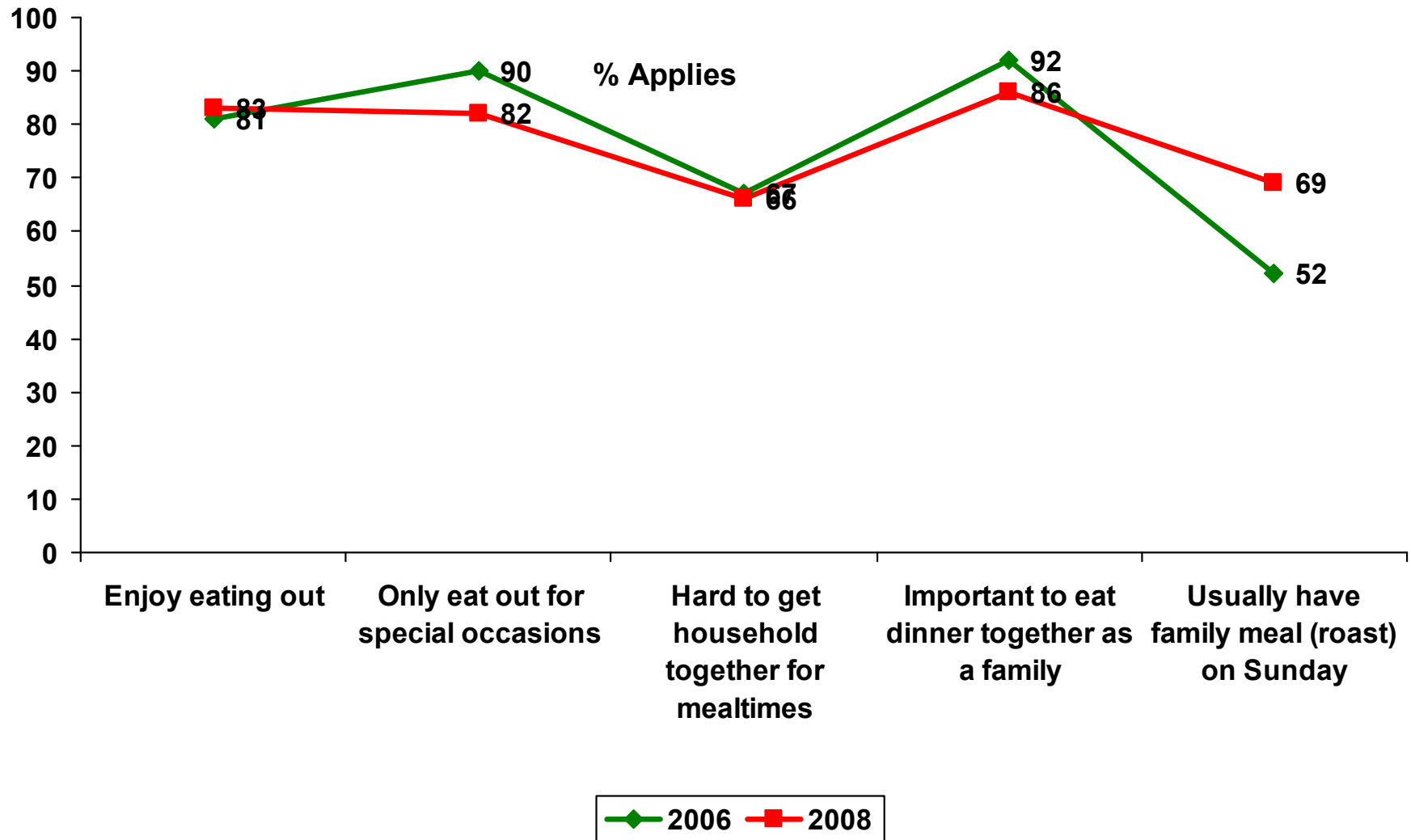
(Base: All Adults 18+ - Spain)



*New attribute added 2008

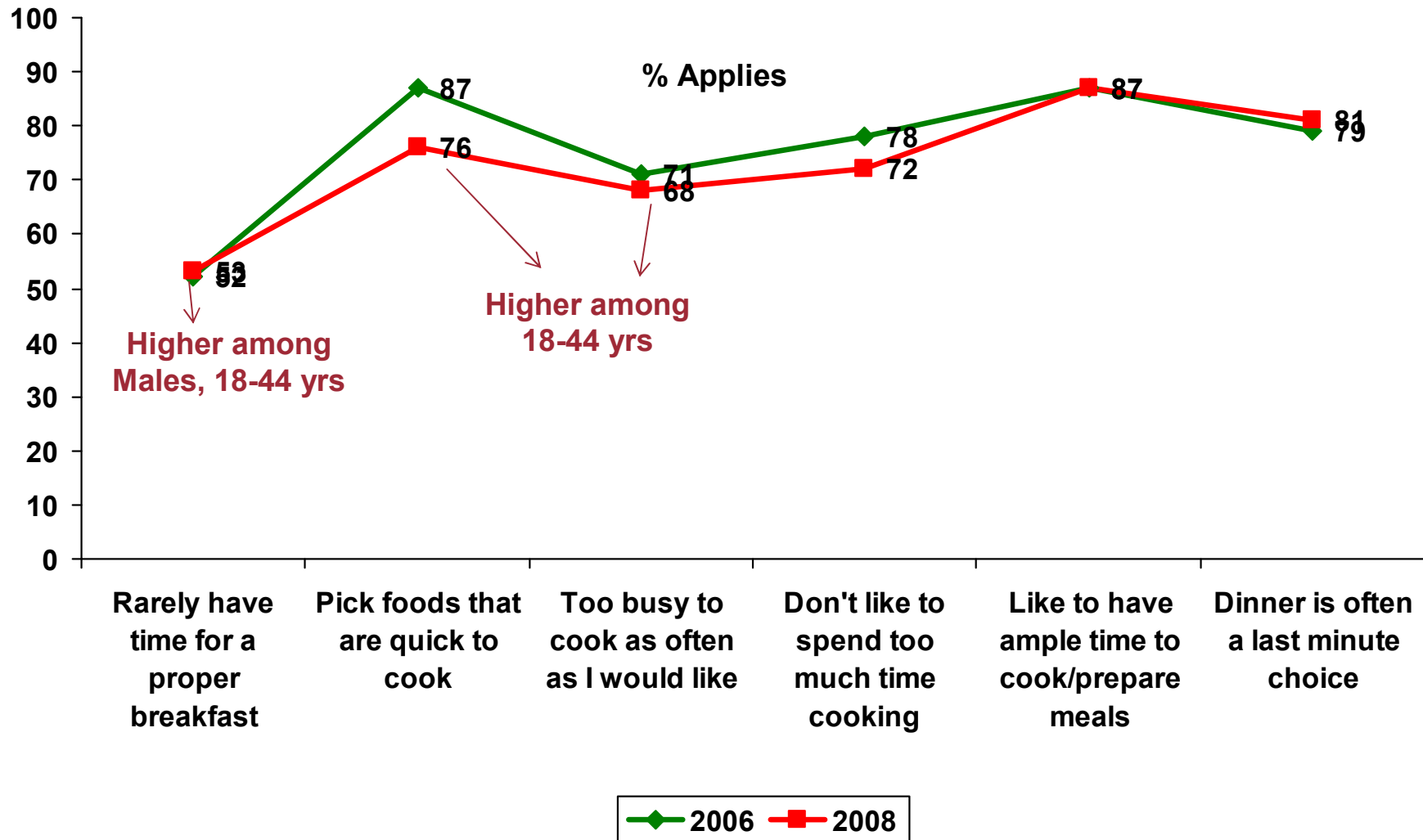
Meal times important for family time

(Base: All Adults 18+ - Spain)



Time pressures evident

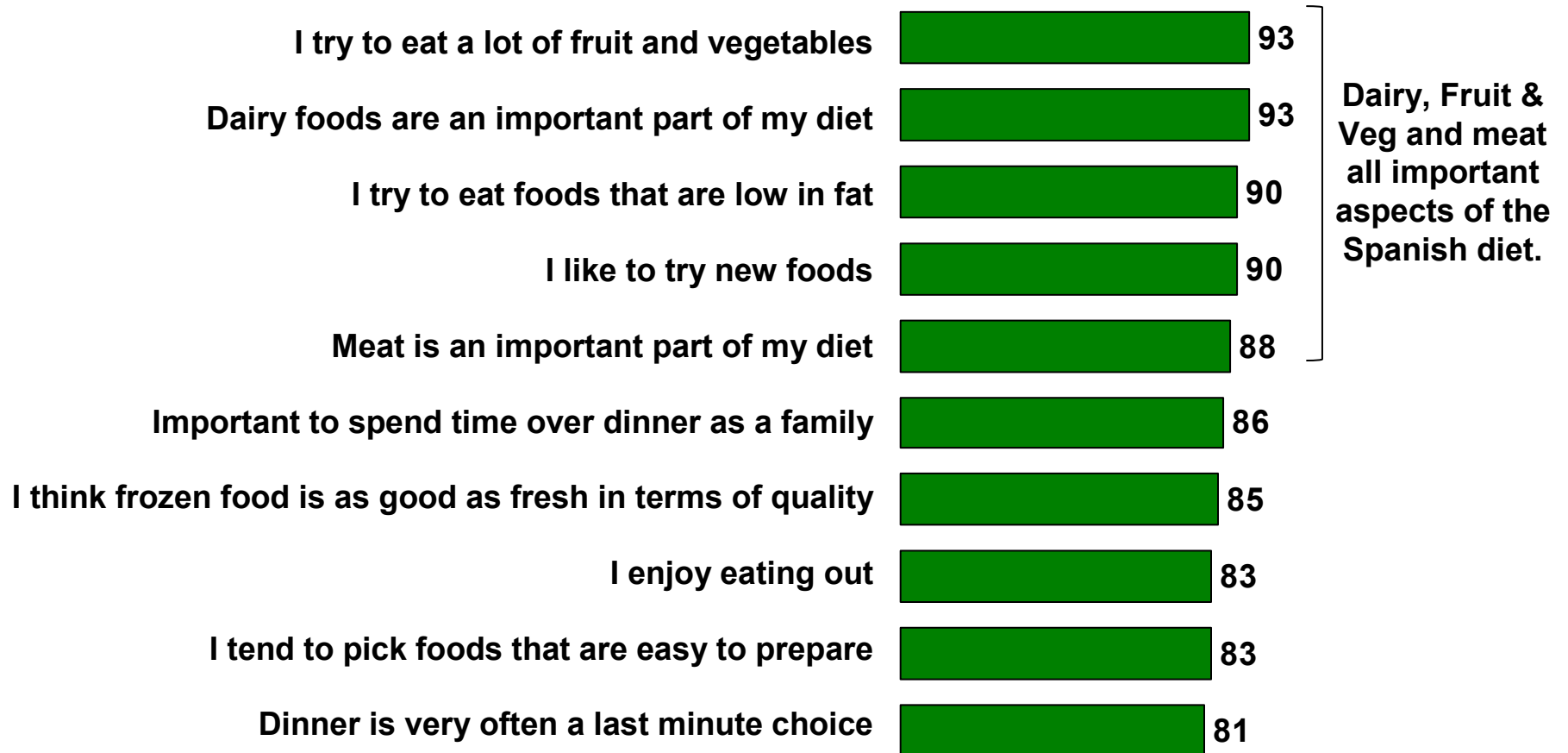
(Base: All Adults 18+ - Spain)



Primary attitudes to food

(Base: All Adults 18+ - Spain)

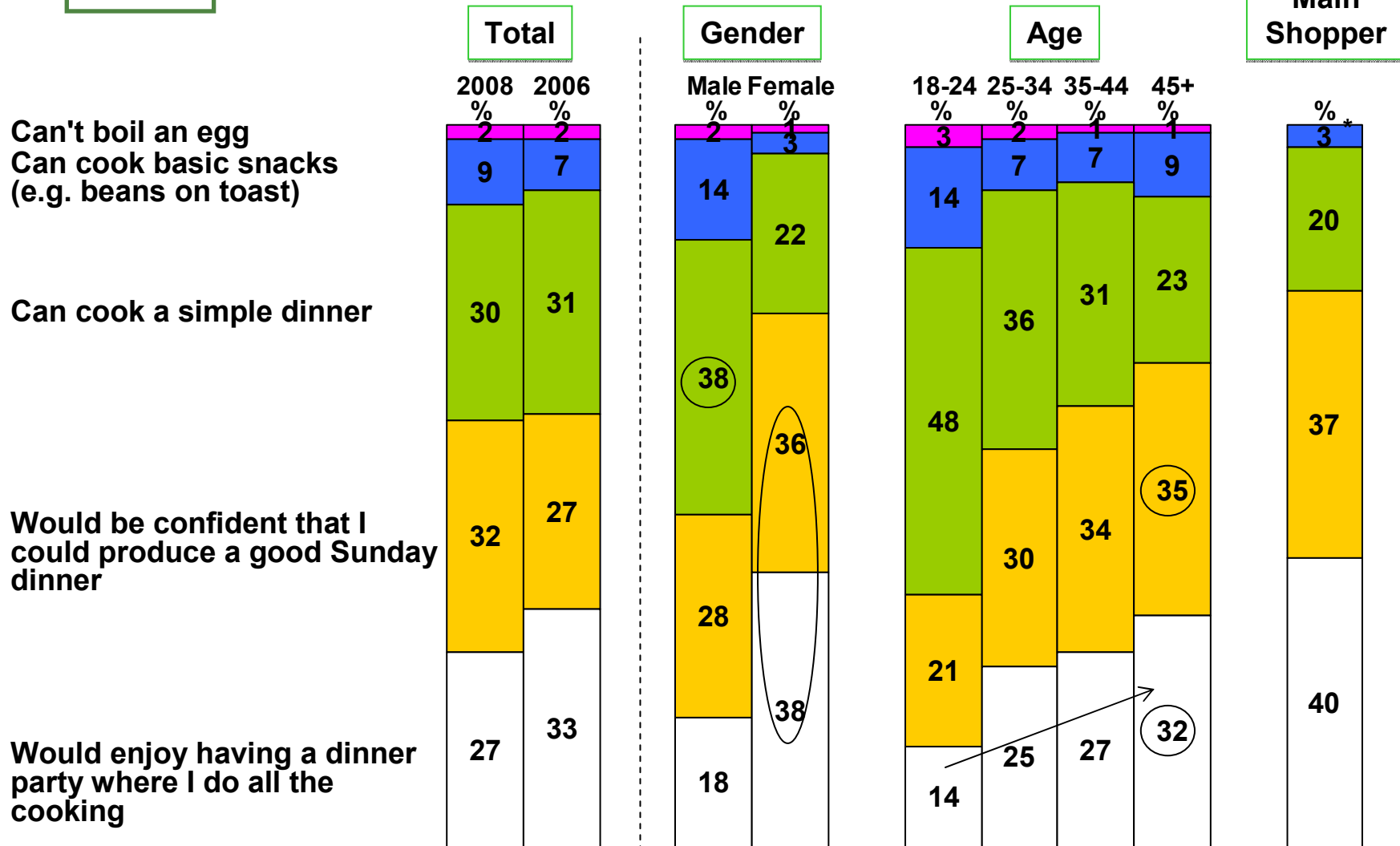
% Applies



Good cooking skills

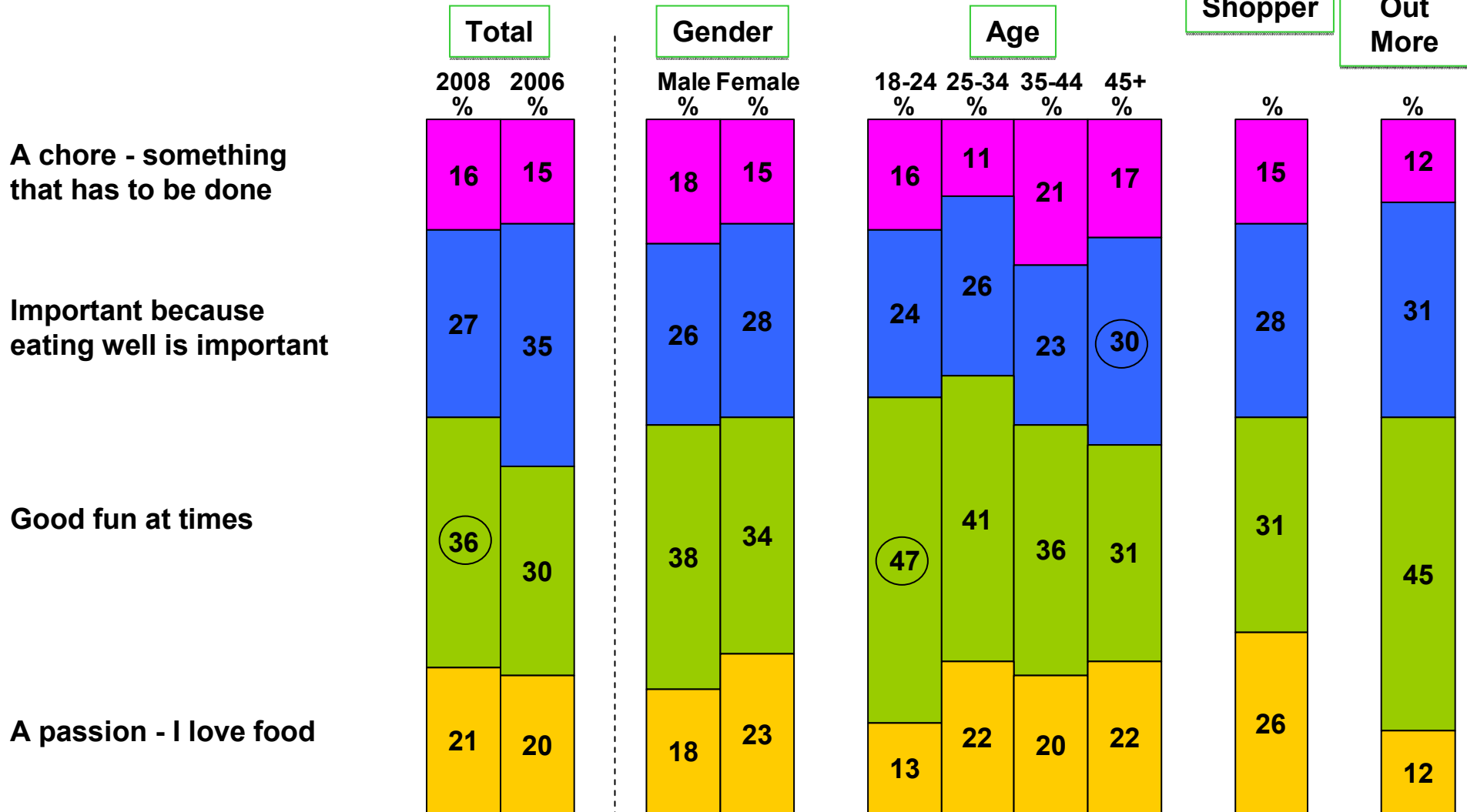
2008

(Base: All Adults 18+ - Spain)



Cooking considered good fun

(Base: All Adults 18+ - Spain)



Majority prepare meals from scratch daily

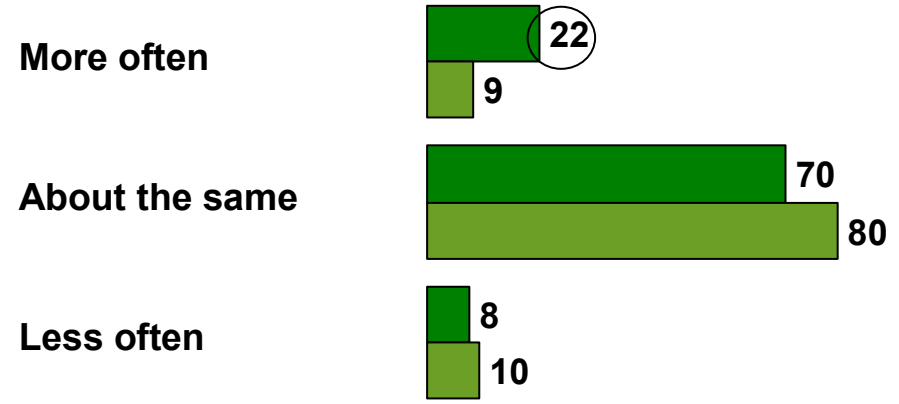
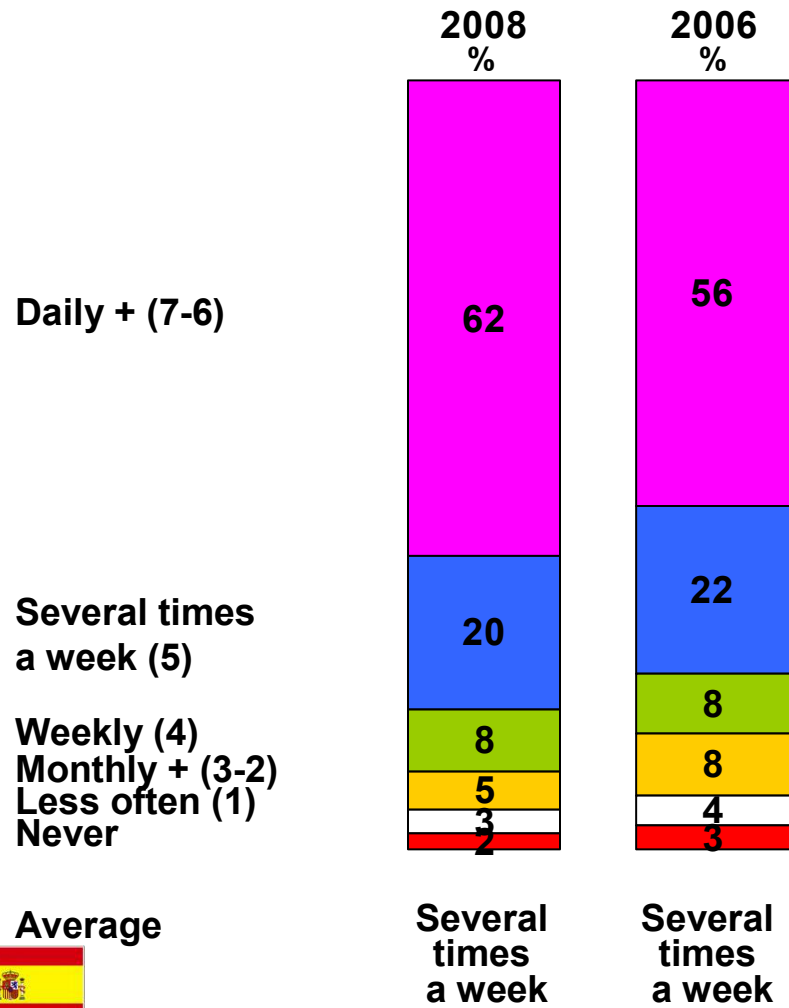
(Base: All Adults 18+ - Spain)

2008
2006

Frequency of Preparing/Cooking Meals from Scratch

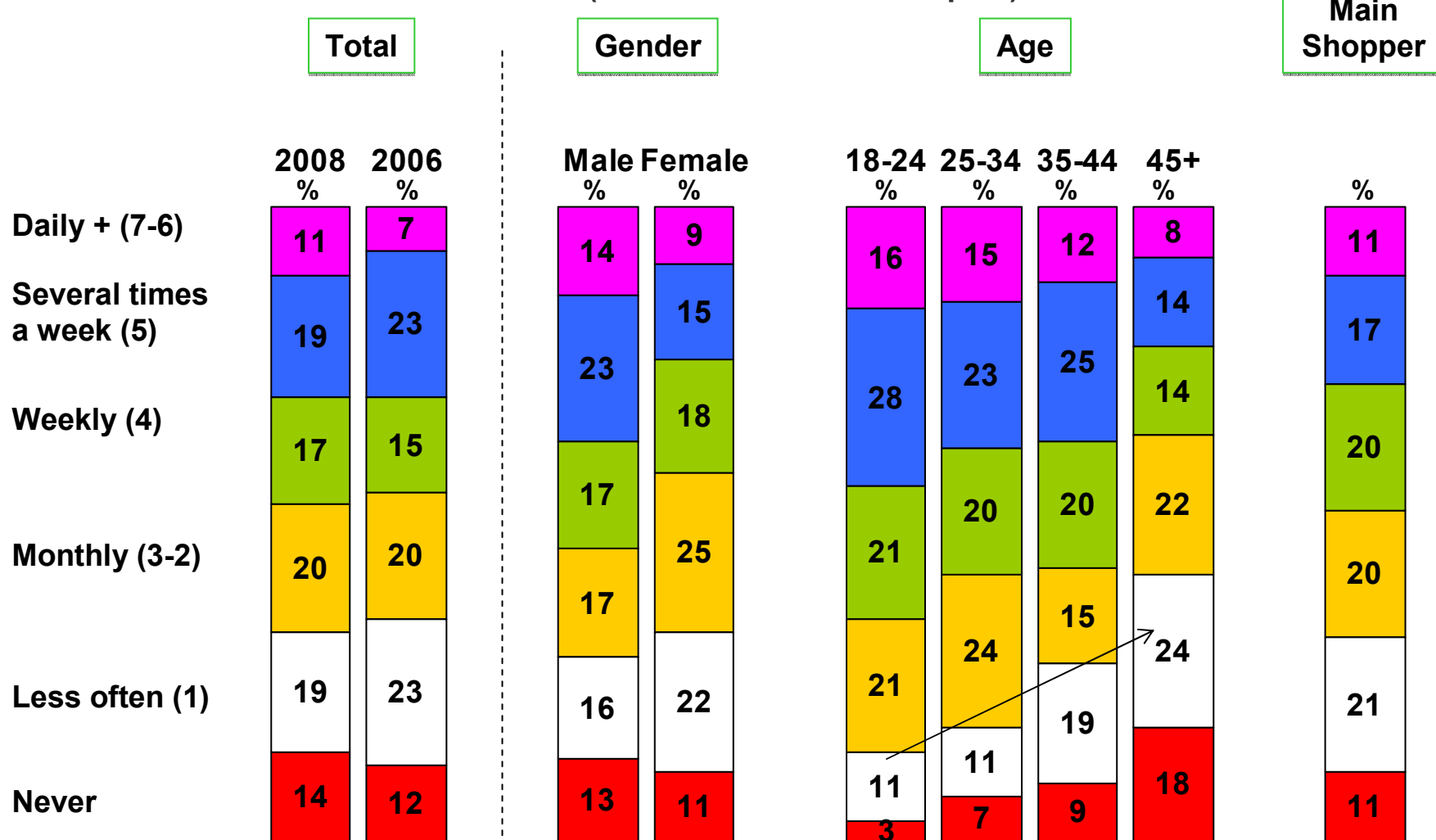
Frequency

Change in Frequency



Low frequency of using ready prepared ingredients

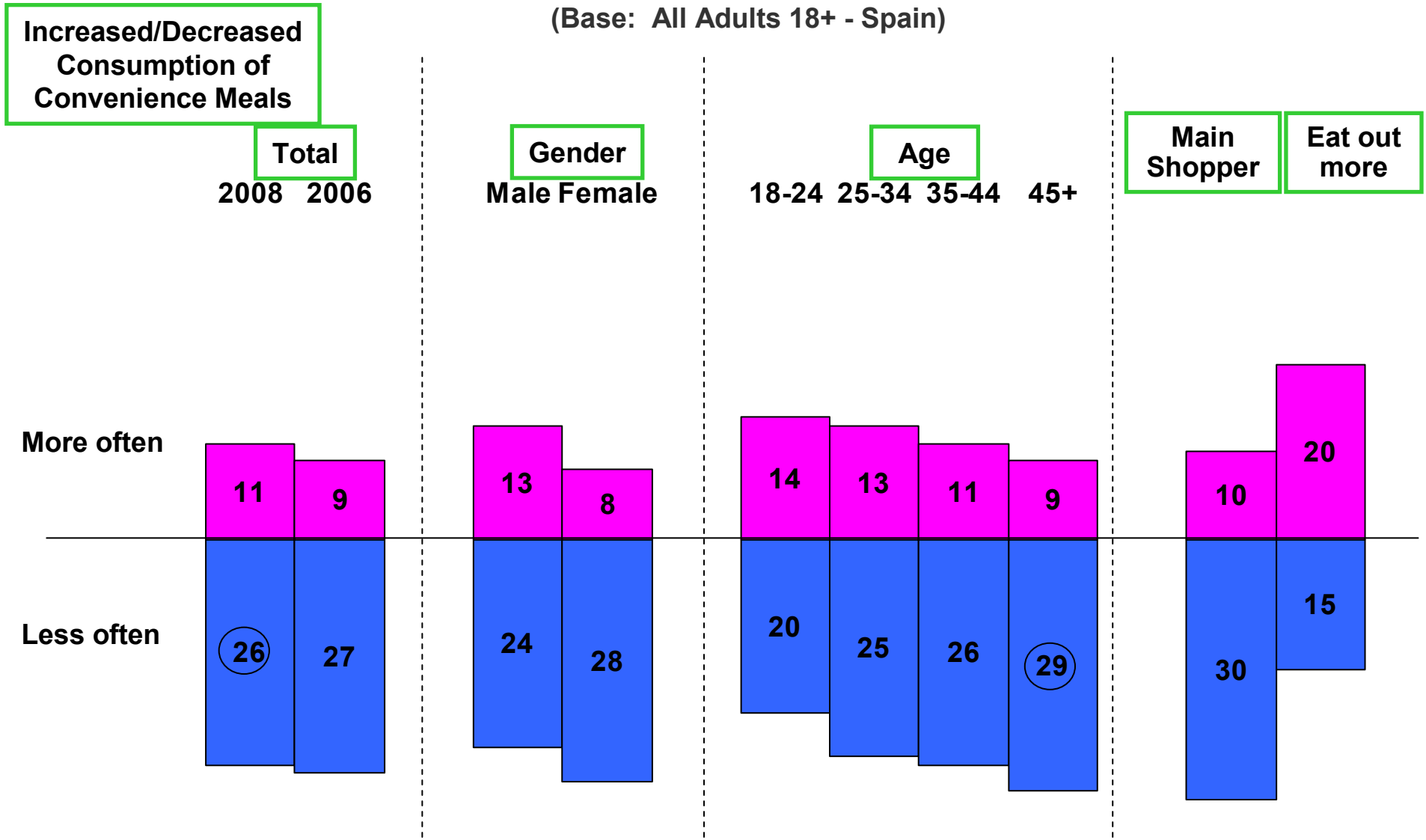
(Base: All Adults 18+ - Spain)



Older generations less likely to use ready prepared ingredients.

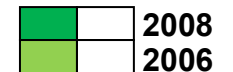


Ready meals eaten less often

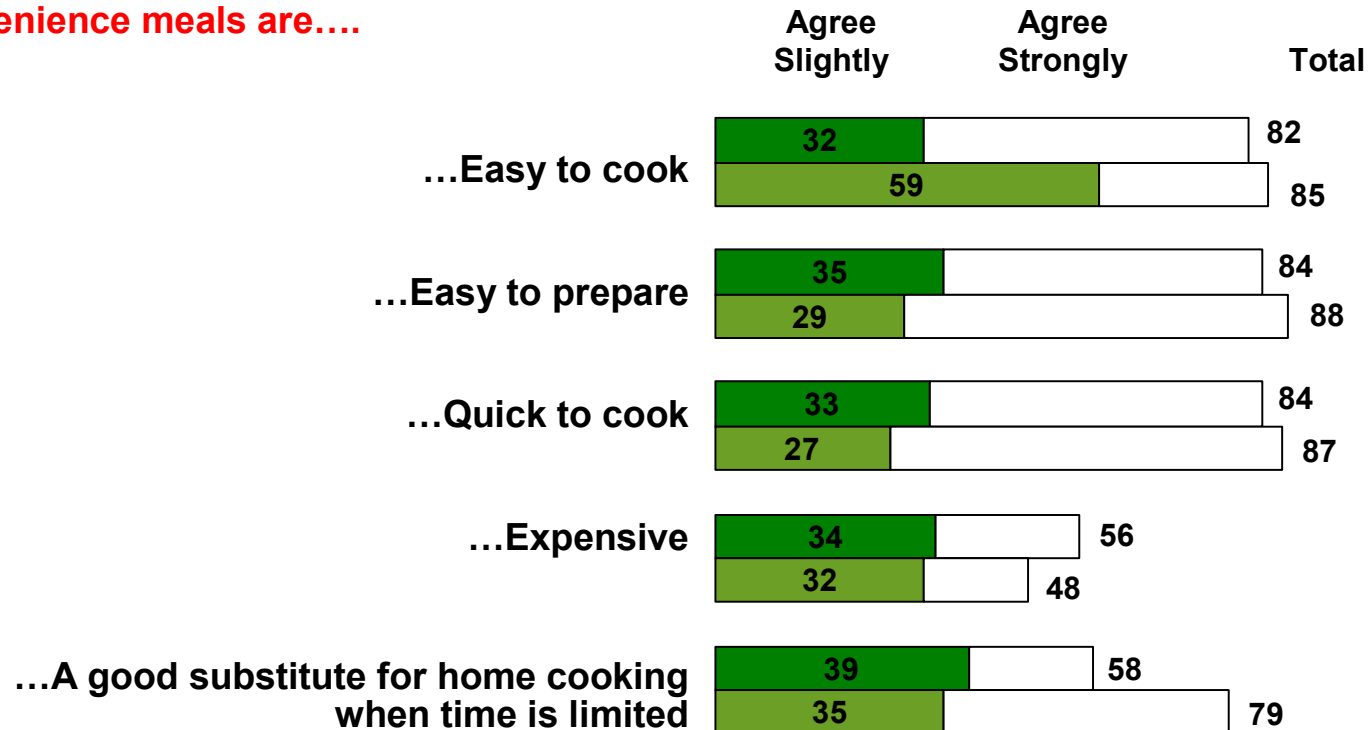


Perceptions of convenience meals declining

(Base: All Adults 18+ - Spain)



Convenience meals are....

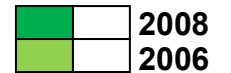


Spanish differ in attitudes to convenience meals:
 -Younger (18-34) always have them at home, see them as filling but feel the ingredients are of poor quality.
 -Older (45+) easy to cook and prepare and good substitute when time is limited.

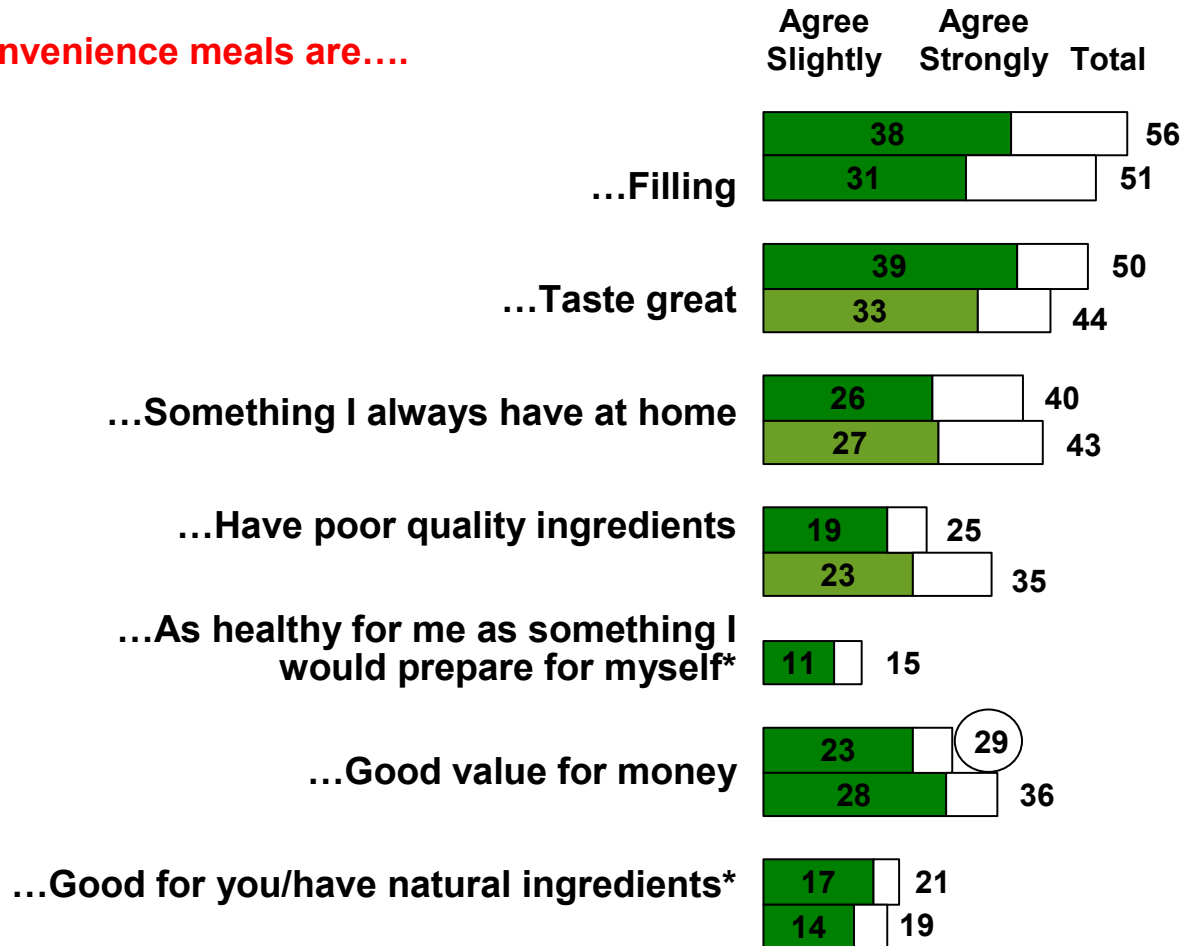


Viewed as not good value for money

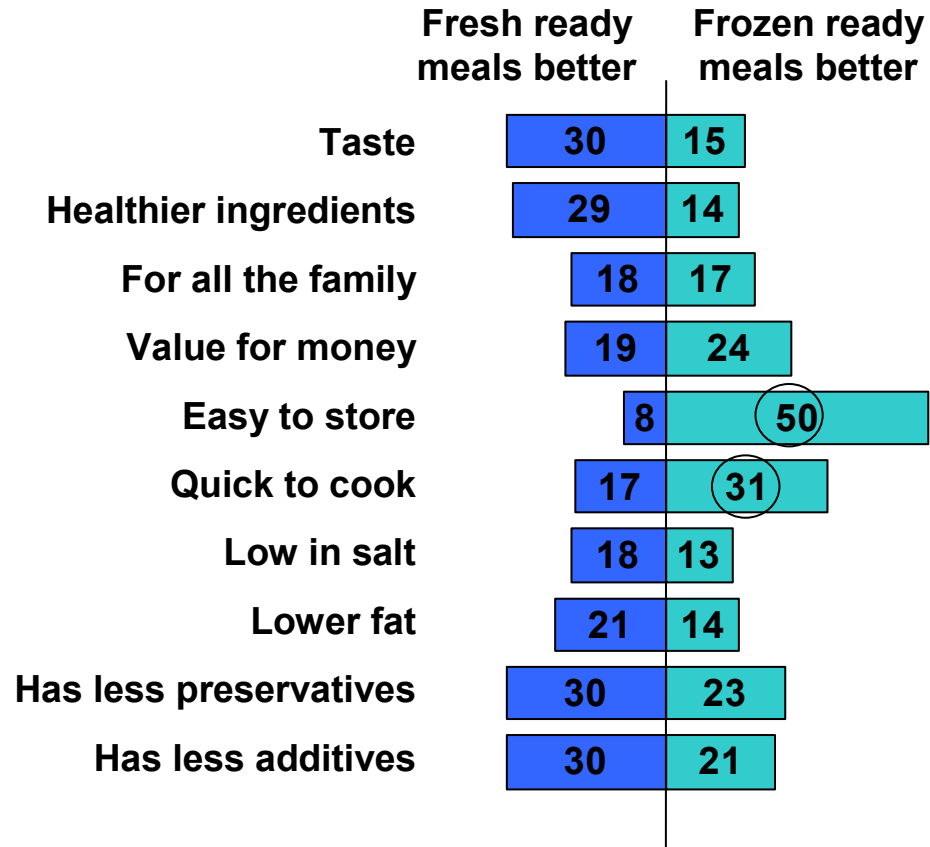
(Base: All Adults 18+ - Spain)



Convenience meals are....



Fresh wins over frozen



Spanish rate fresh ready meals lower than other countries especially on taste and healthy ingredients.



SECTION 2: Eating In Home



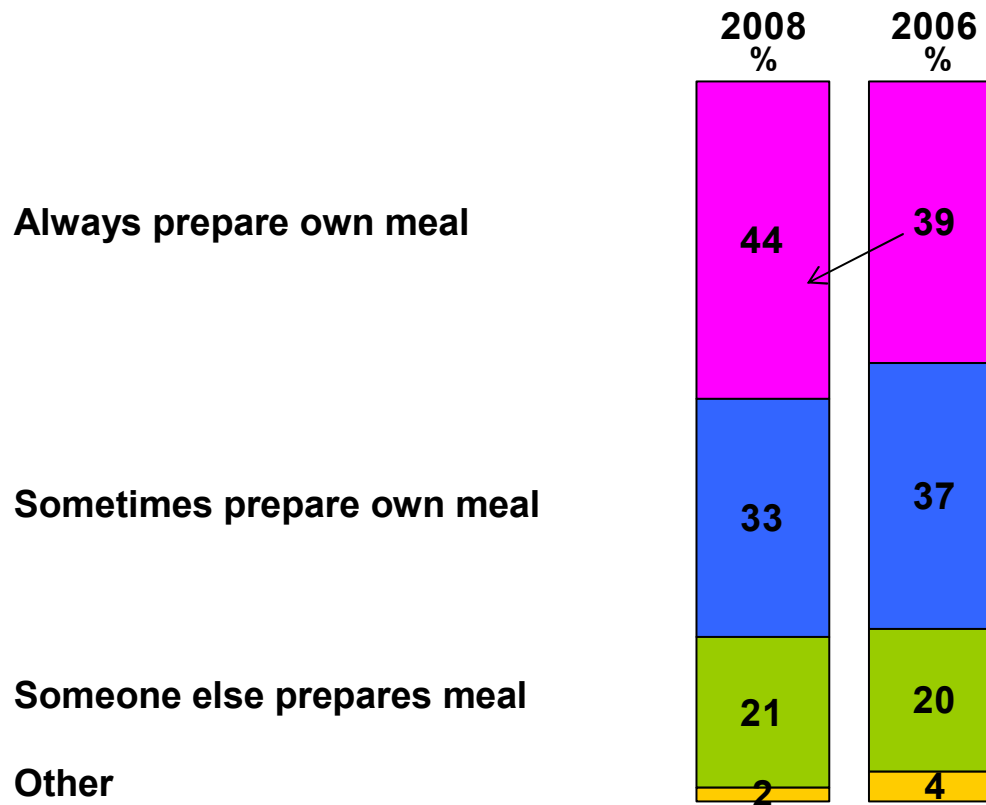
Eating in home summary points

- ◆ **Over four in ten are responsible for their own meal preparation, one third share meal preparation whilst one fifth have their meals prepared for them by someone else.**
- ◆ **Meal preparation is predominantly female and higher amongst older age groups.**
- ◆ **The Spanish like to boil and stir-fry their foods, frying is also high.**
- ◆ **For health steaming and boiling are perceived as best.**
- ◆ **Quality & healthiness are top of the list of priorities for Spanish when ranking what's important to food. Taste is more important to younger Spanish while freshness is more important to older Spanish consumers.**



One fifth rely on someone else to prepare meals

(Base: All Adults 18+ - Spain)

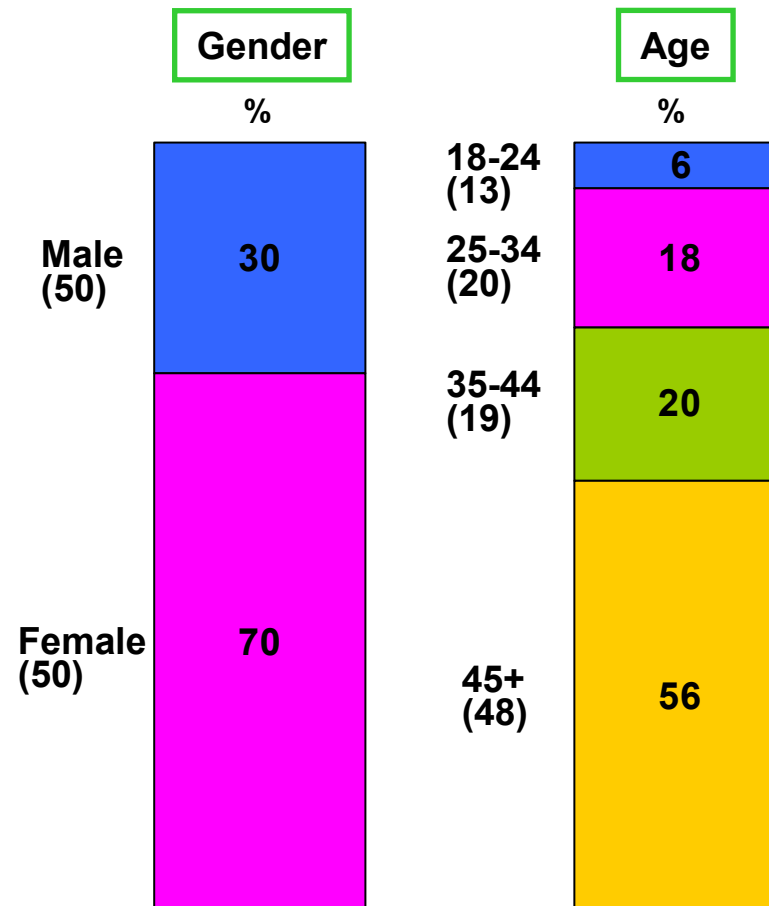


Slight increase evident in proportion preparing their own meal, over four in ten.



Female are meal preparers

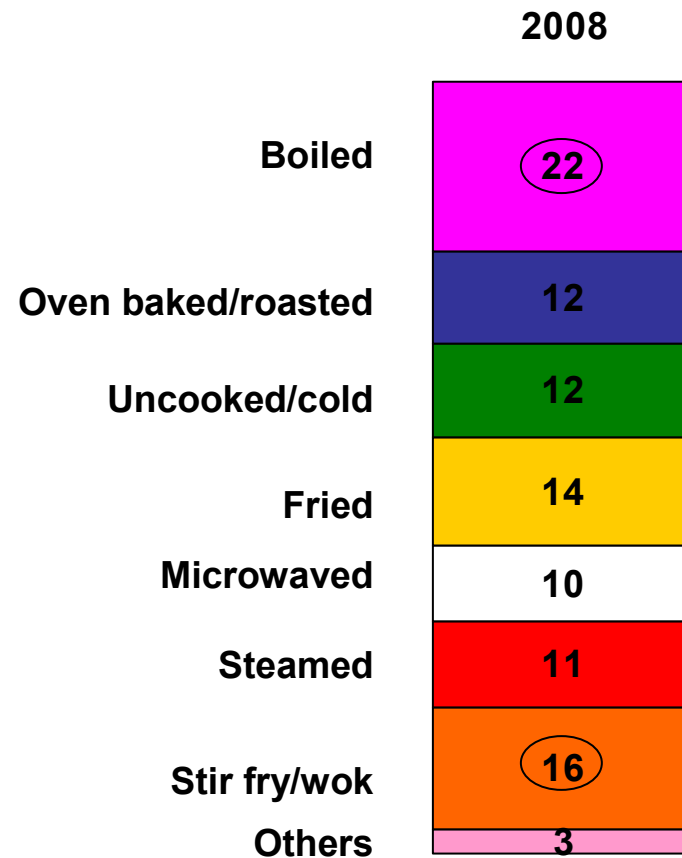
(Base: All Adults who prepare own meal – 44%)



Boiling most popular food preparation

Preparation
of Food

(Base: All who always prepare own meals - 44%)



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

Steaming & boiling considered healthiest

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

Ranking of Methods of
Cooking – Based on
Healthiness of Method

Worst for health

- Fried, 6.4
- Microwave, 5.2
- Stirfry/wok, 4.4
- Uncooked, 4.0
- Oven baked/roasted, 3.8
- Boiled/Boil in bag, 2.6
- Steamed, 1.7

Best for health

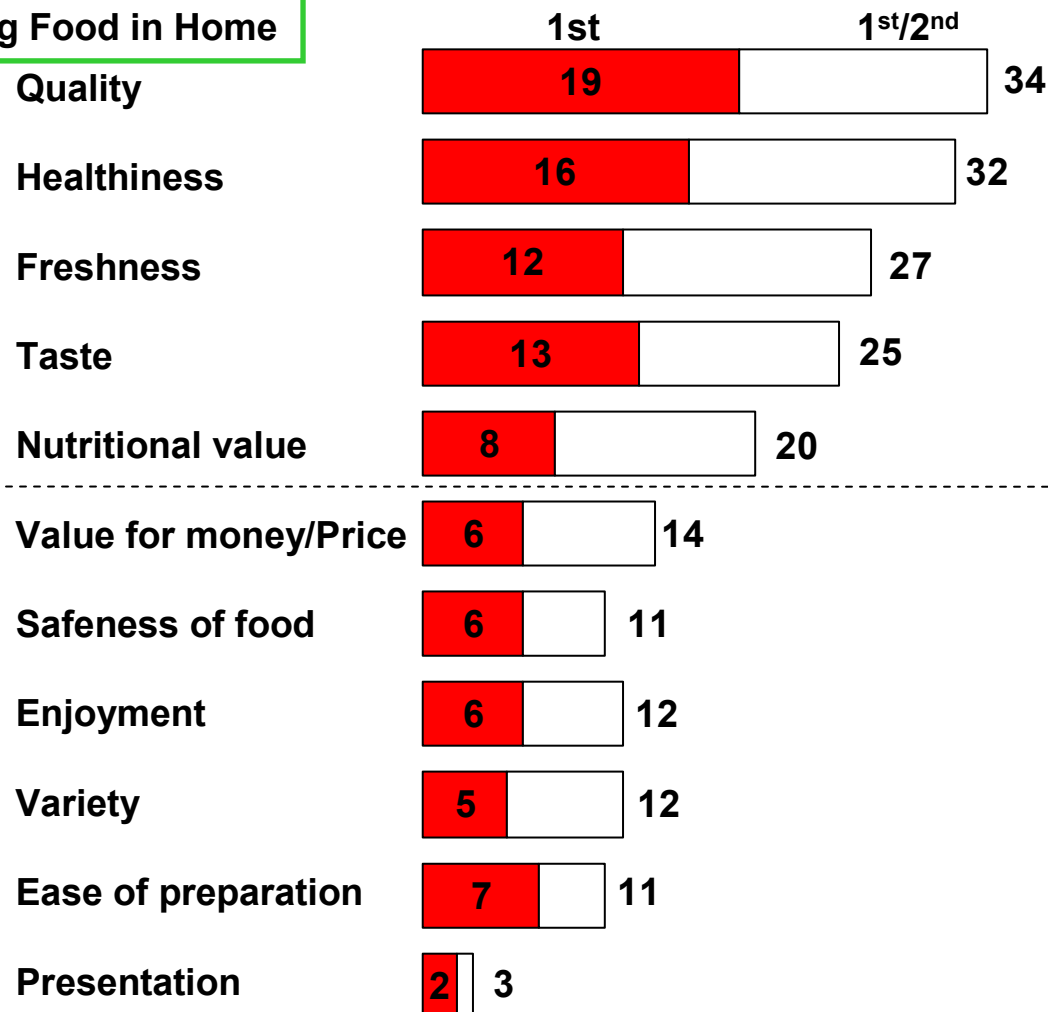


Ranked from 1 through 8.
1 = Best for health, 8 = Worst for health

Quality & healthiness top priorities

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

(Base: All Adults 18+ - Spain)



Taste is rated higher among 18-34 year olds while freshness is rated higher amongst 45+ yrs.

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



SECTION 3: Eating Out of Home



Eating out of home summary points

- ◆ **The Spanish are eating out less in 2008. Midweek dining out has decreased and is seen now as more of a treat or a chance to meet up with friends.**
- ◆ **Fewer Spanish report that they have eaten out in a cafe or bar or have had a takeaway meal in the past week compared with 2006.**
- ◆ **Frequency of eating at work has remained stable but frequency of eating in the car has reduced.**

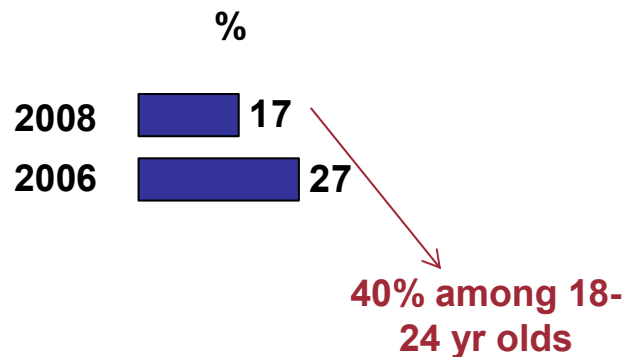


Decline in midweek eating out

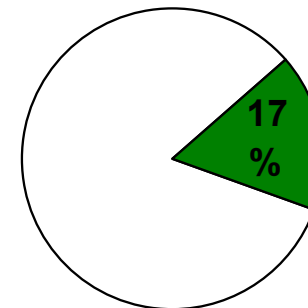
(Base: All Adults 18+ - Spain)

“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 (50%).
2. Chance to meet with friends/catch up (47%).
3. Staying out for the evening/going somewhere else late so I don't want to go home (25%).
4. Working day is longer (22%).

Not as high a proportion increasing their eating out patterns as 2006, however key reasons remain the same.

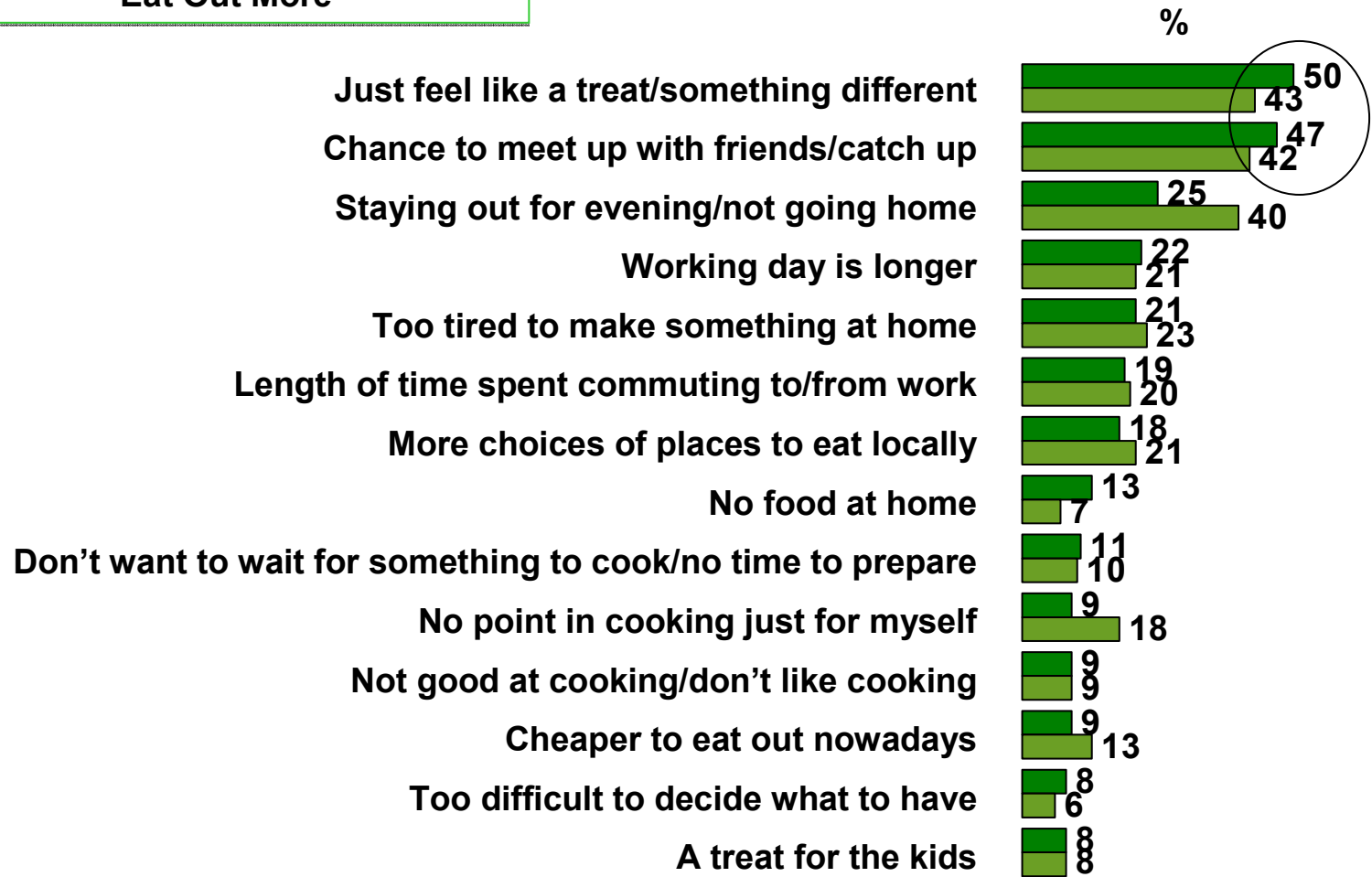


Eating out a treat & something sociable

(Base: All who eat out more during the week – 17%)



Factors Influencing Decision to Eat Out More

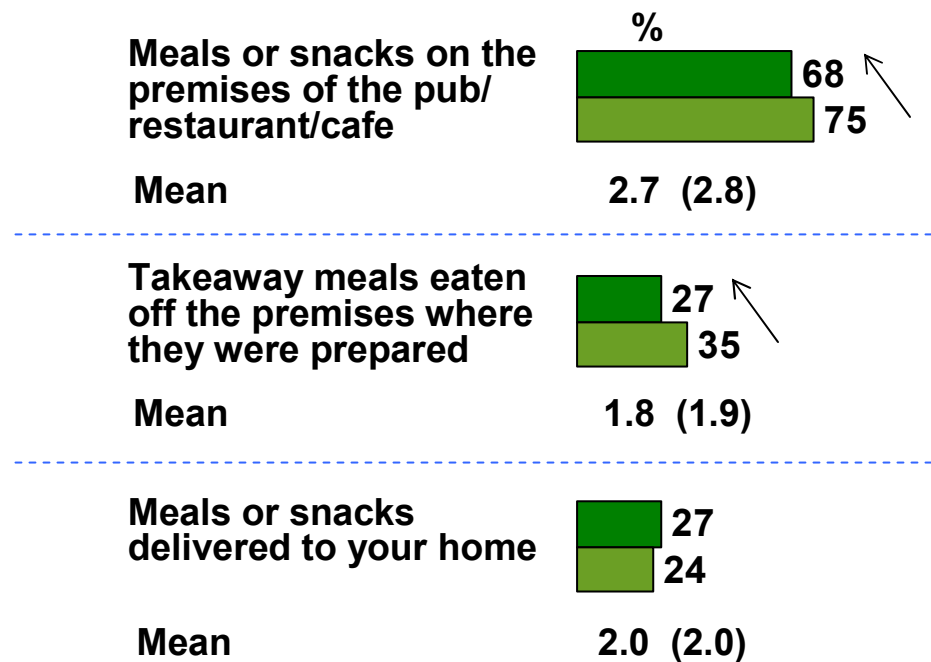


Marginal decrease in takeaway & pub meals

(Base: All Adults 18+ - Spain)



Meals Eaten Out in the Last 7 Days – Summary



Mean based on % of those who ate out
() = 2006

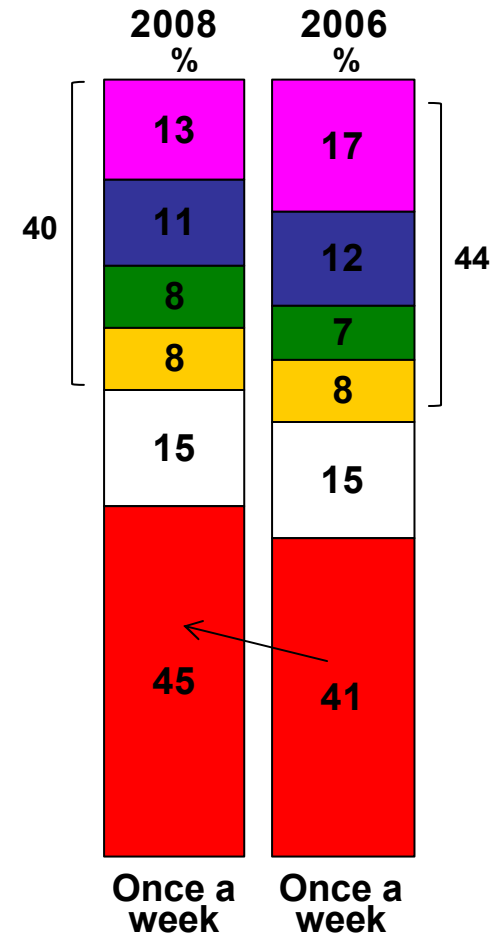
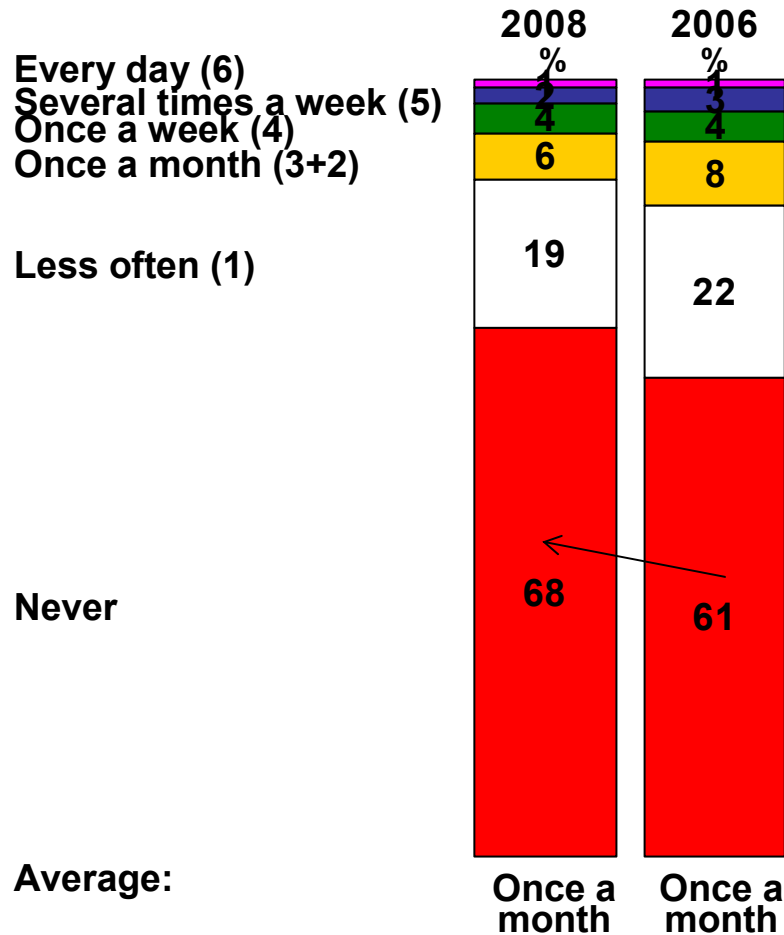
Reduced incidence of eating in the car

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

(Base: All Adults 18+ - Spain)

In the car

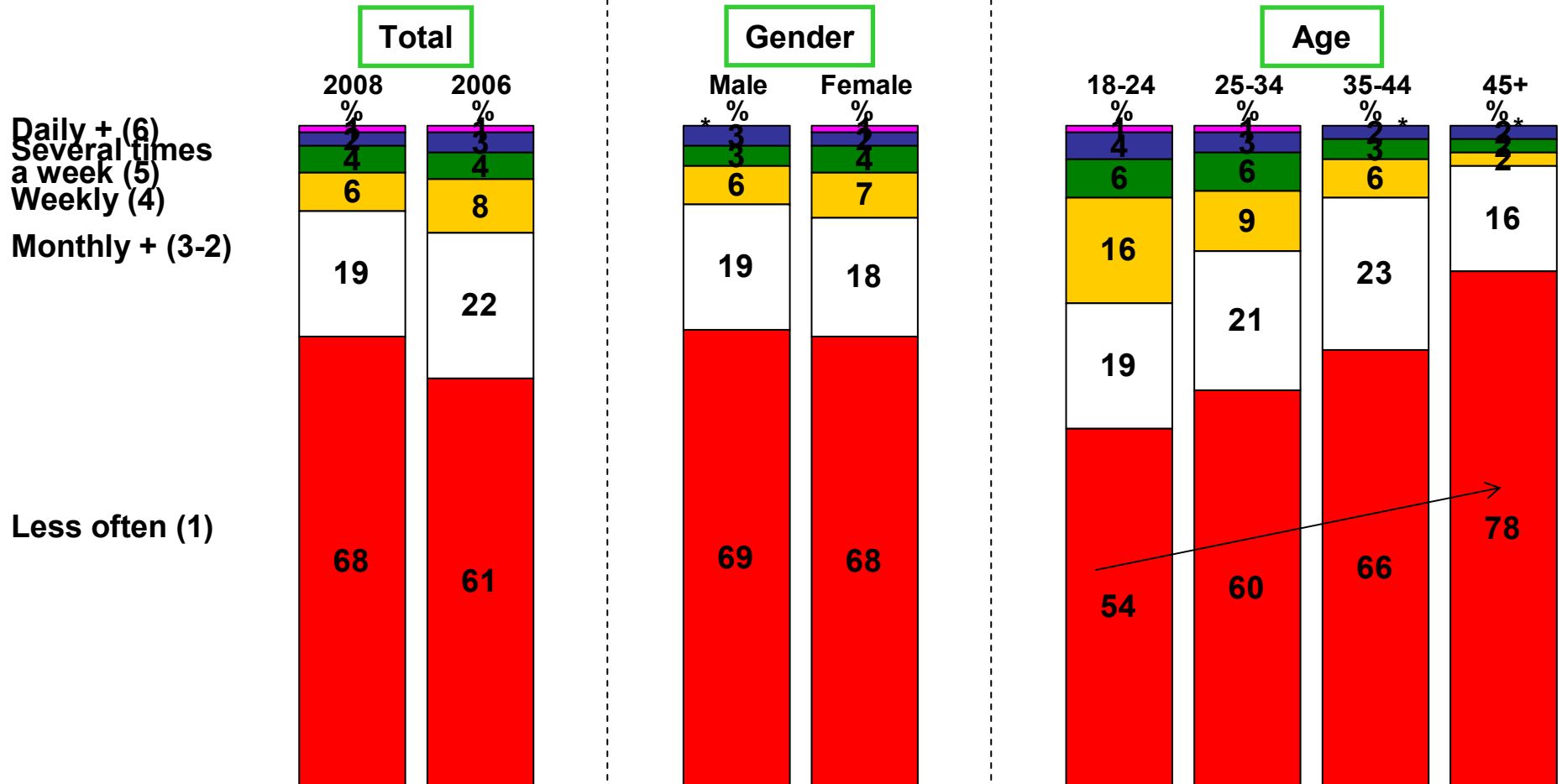
At work



45+ least likely to eat in car

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

(Base: All Adults 18+ - Spain)



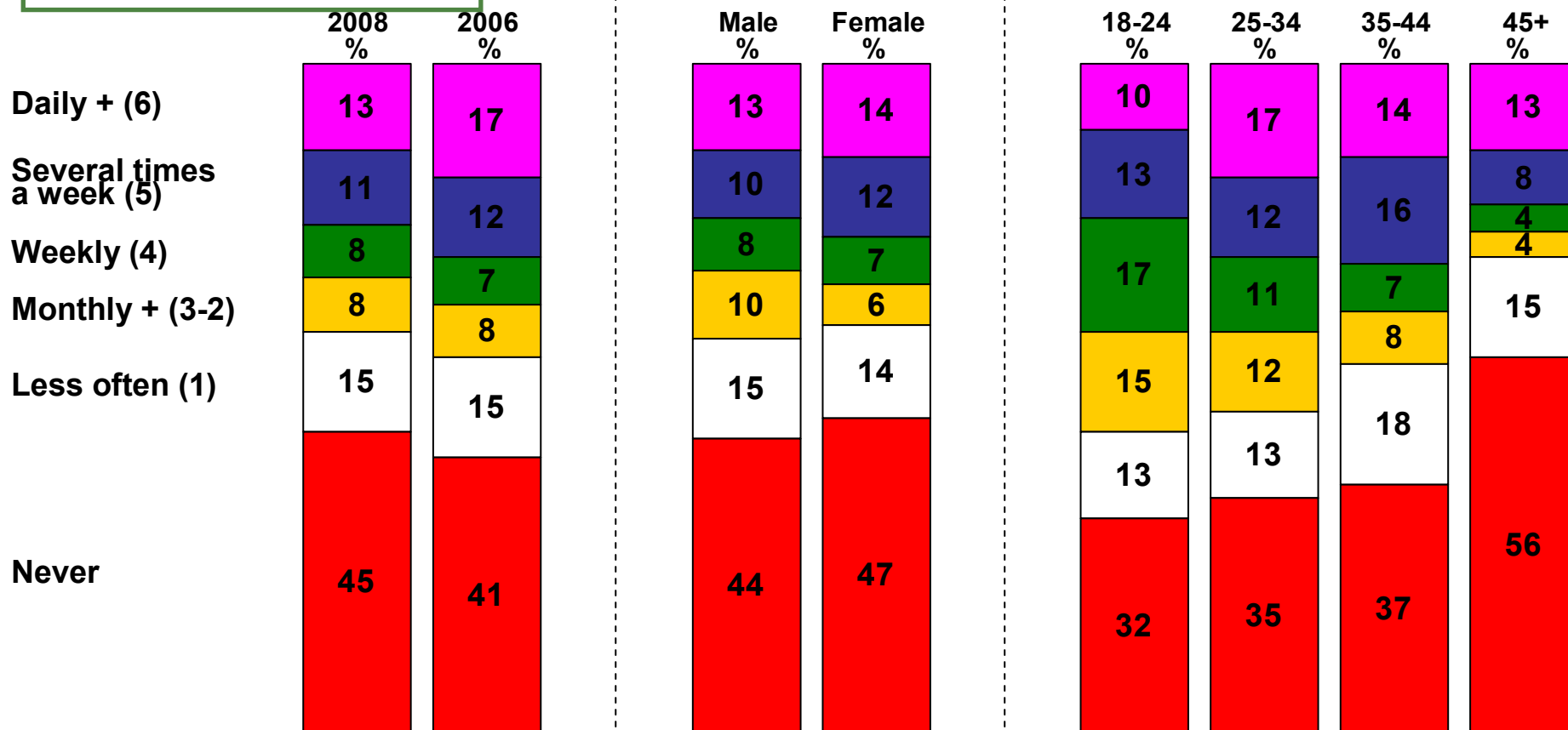
No difference between male/female frequency of eating at work

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

(Base: All Adults 18+ - Spain)

Gender

Age



Retired segments reducing frequency of 45+ age groups



Canteen & at desk – 2 primary locations for eating at work

Location (Most Often) for Eating in Workplace

(Base: All Adults 18+ - Spain)

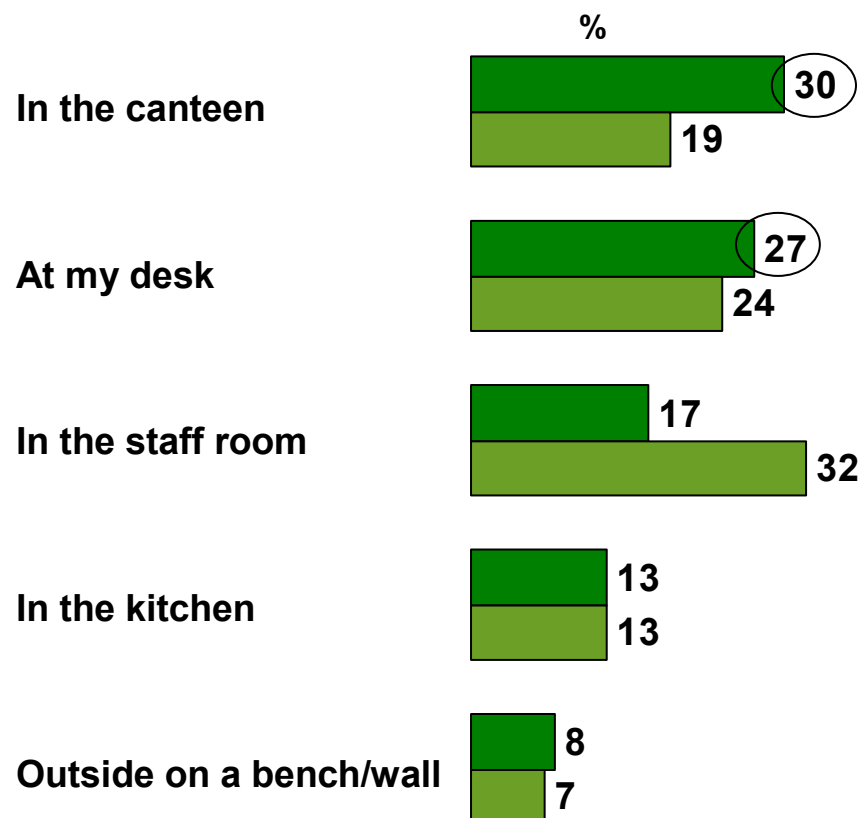
2008
2006

% eat more than twice monthly



Yes →

Location of Eating



SECTION 4: Health and Wellbeing



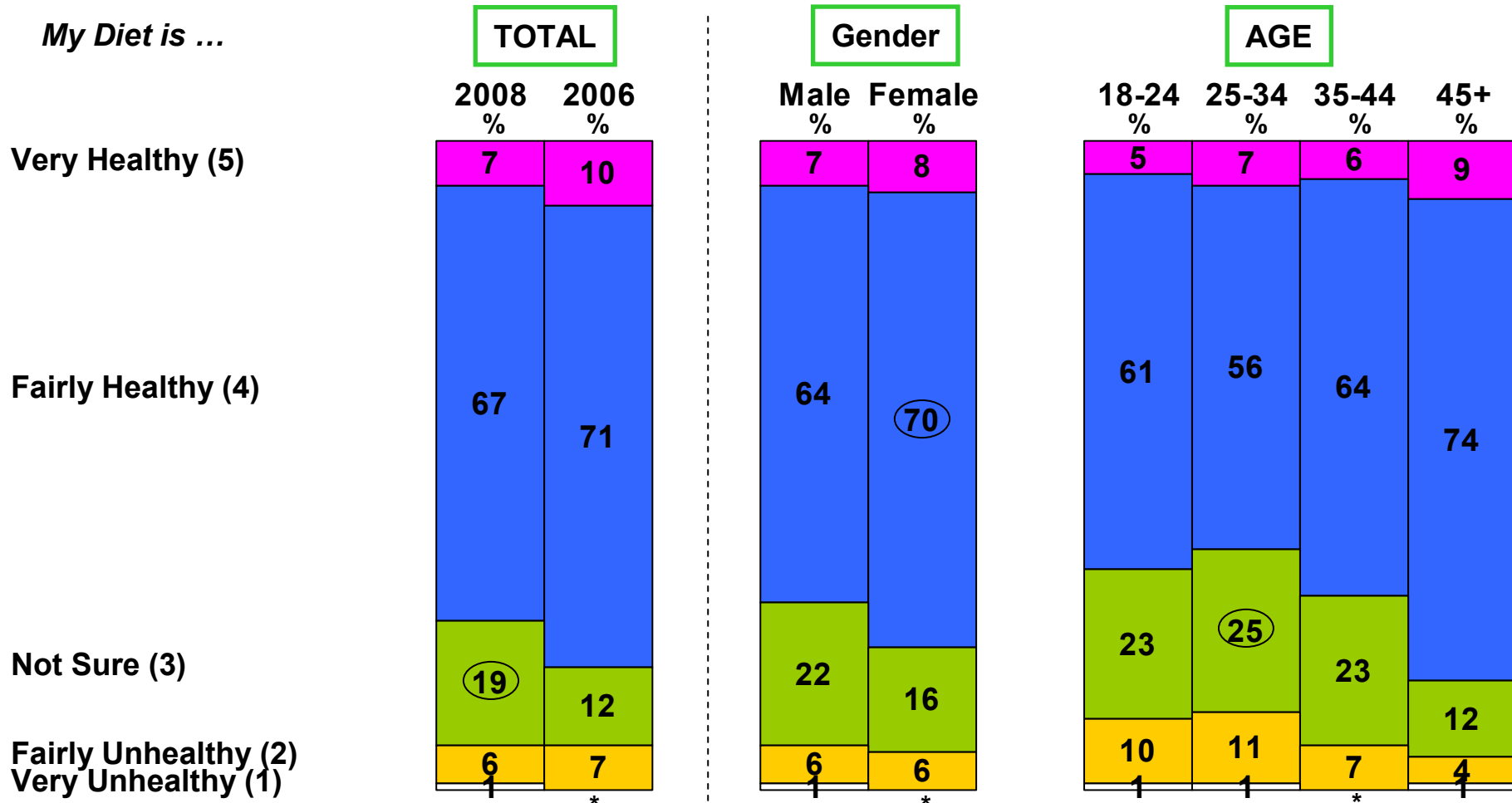
Attitude towards diet and wellbeing summary points

- ◆ **Spanish are very conscious of being healthy eaters and the impact that this has on having a healthy mind, they are also conscious of weight and watching the food and beverages they consume.**
- ◆ **Relate healthy foods with being expensive but would pay extra for healthy foods that taste great.**
- ◆ **They are conscious of reducing the consumption of ready meals and favouring of low fat options.**
- ◆ **They also feel there are not enough options for those who suffer food intolerances, and would like manufacturers to help them to have healthy eating options.**
- ◆ **The Spanish are conscious of their children's weight, looking to control sugar intake and would be very much in favour of talking to a consultant if their child showed signs of obesity.**
- ◆ **Endeavour to check food labelling for nutritional value but struggle to always understand the nutritional claims.**



One in five not sure if diet is healthy or not

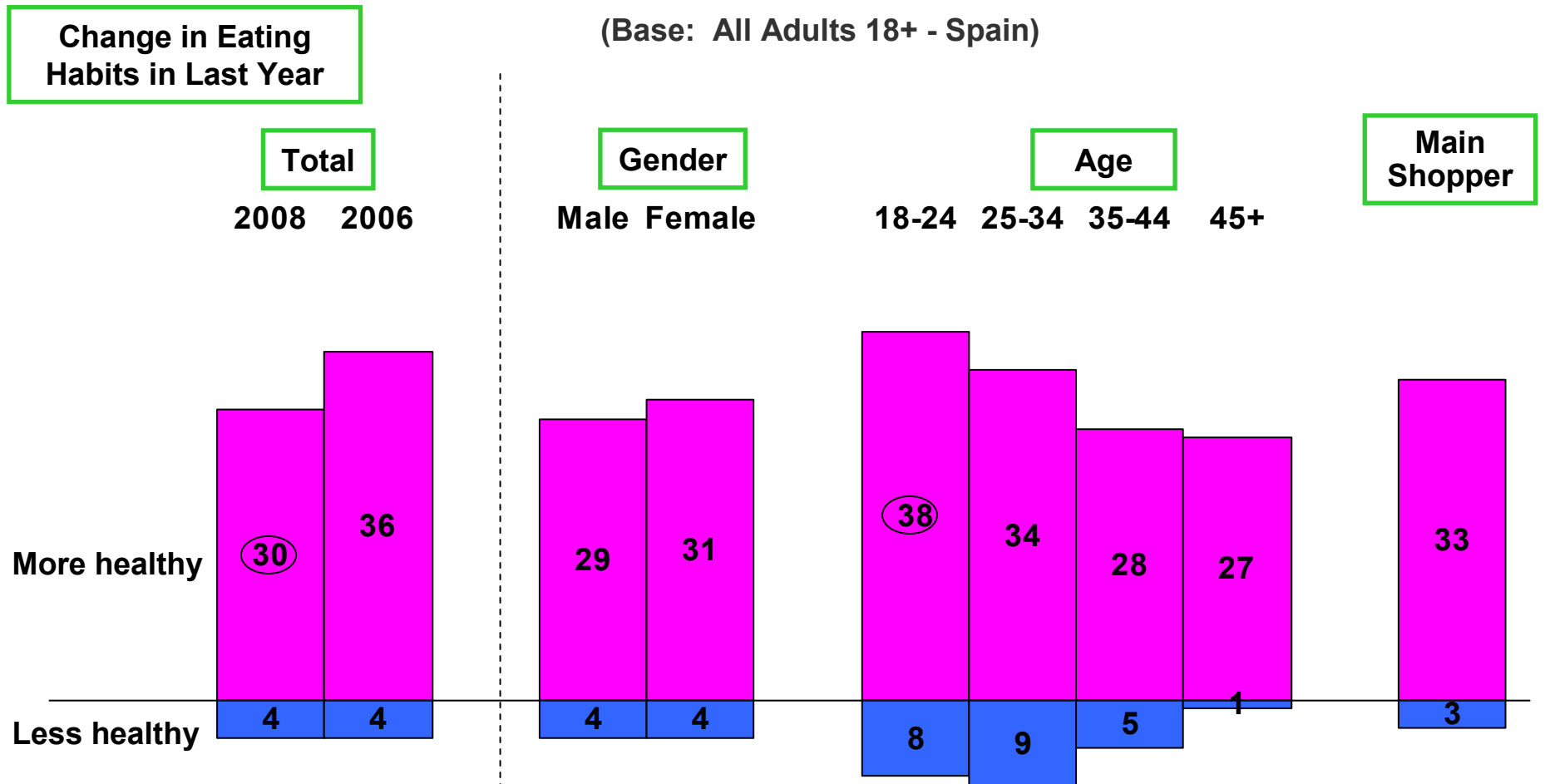
(Base: All Adults 18+ - Spain)



Overall the Spanish believe themselves to be very/fairly healthy however one fifth aren't sure – an increase since 2006.



Eating healthier

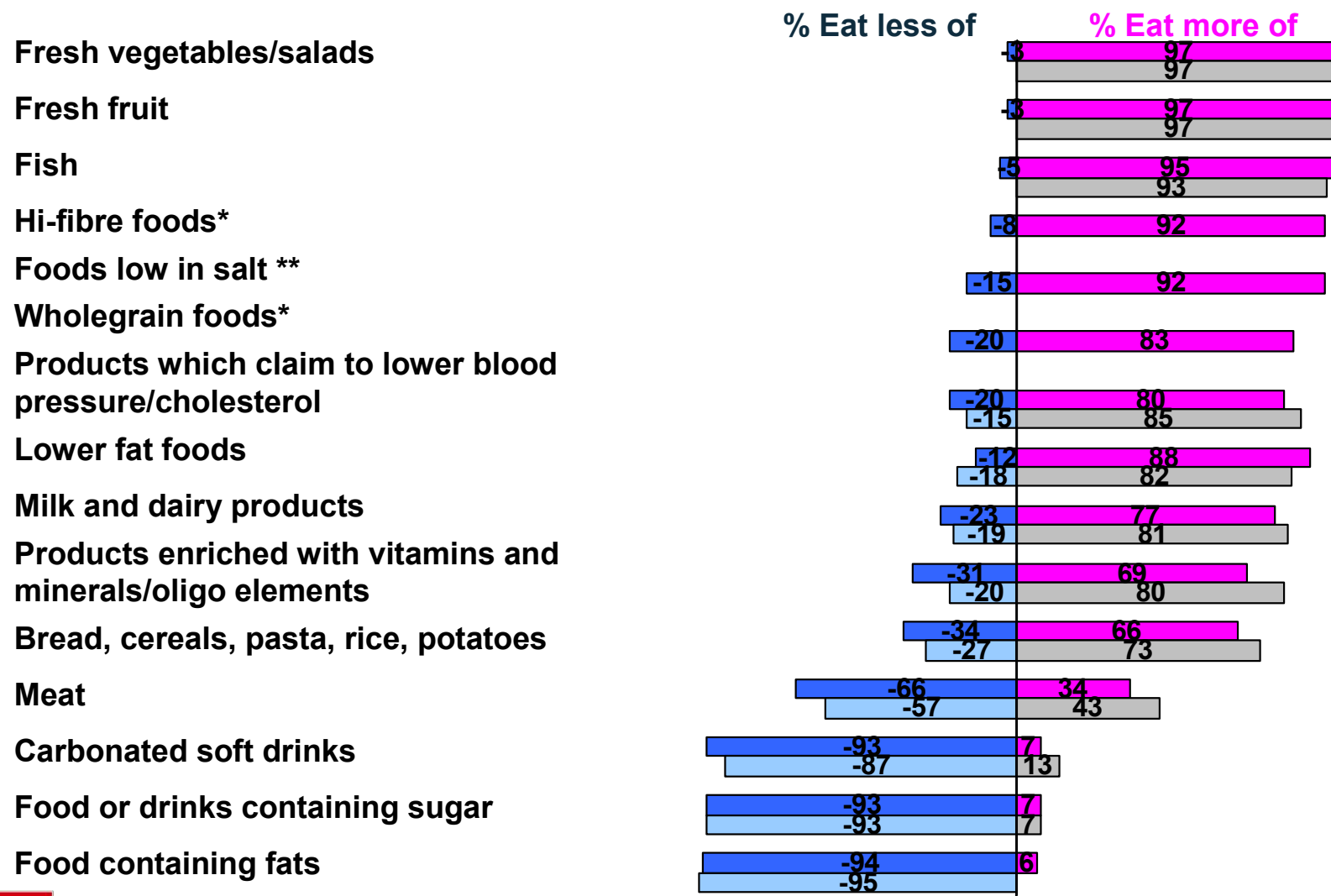
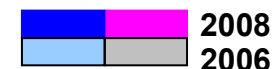


Three in ten believing their eating habits are more healthy than last year – mostly 18-24 year olds.



Consistent in foods eaten more of to be healthy

(Base: All Adults 18+ - Spain)

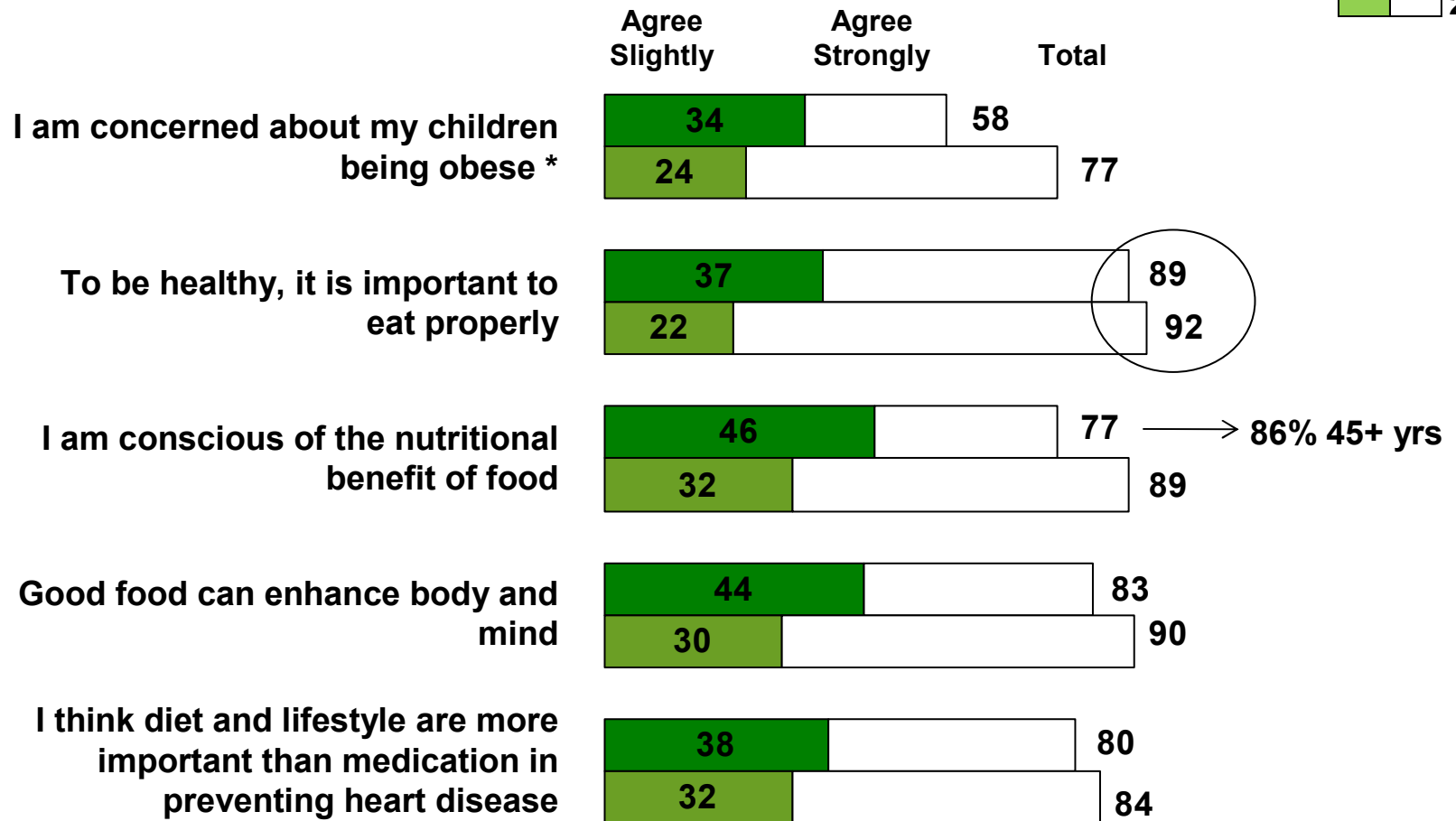
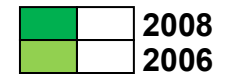


*New question added 2008

**Change in wording in 2008 All others 5% or less

Healthy attitude but some declines

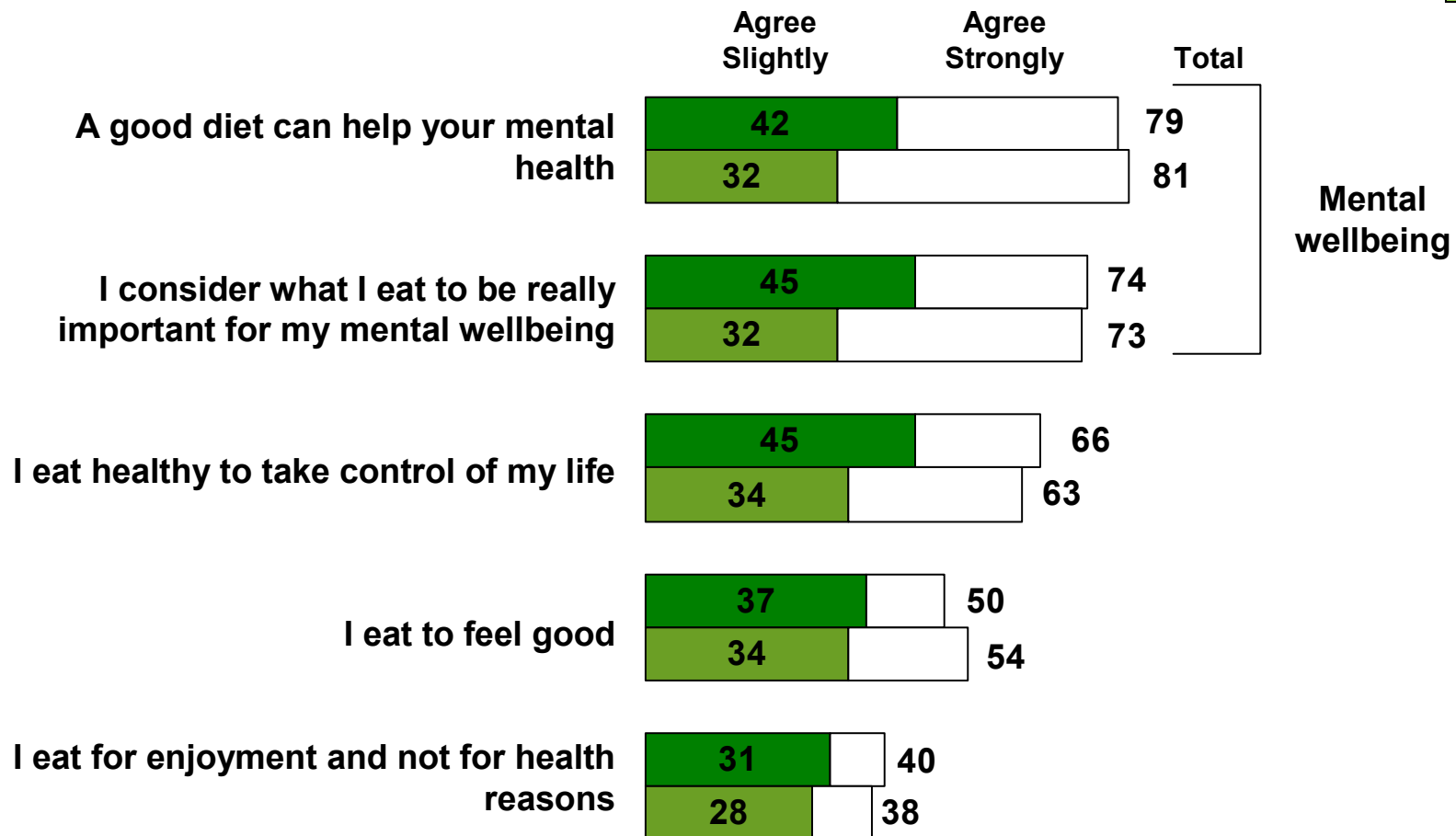
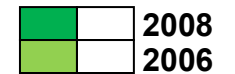
(Base: All Adults 18+ - Spain)



* Those with children

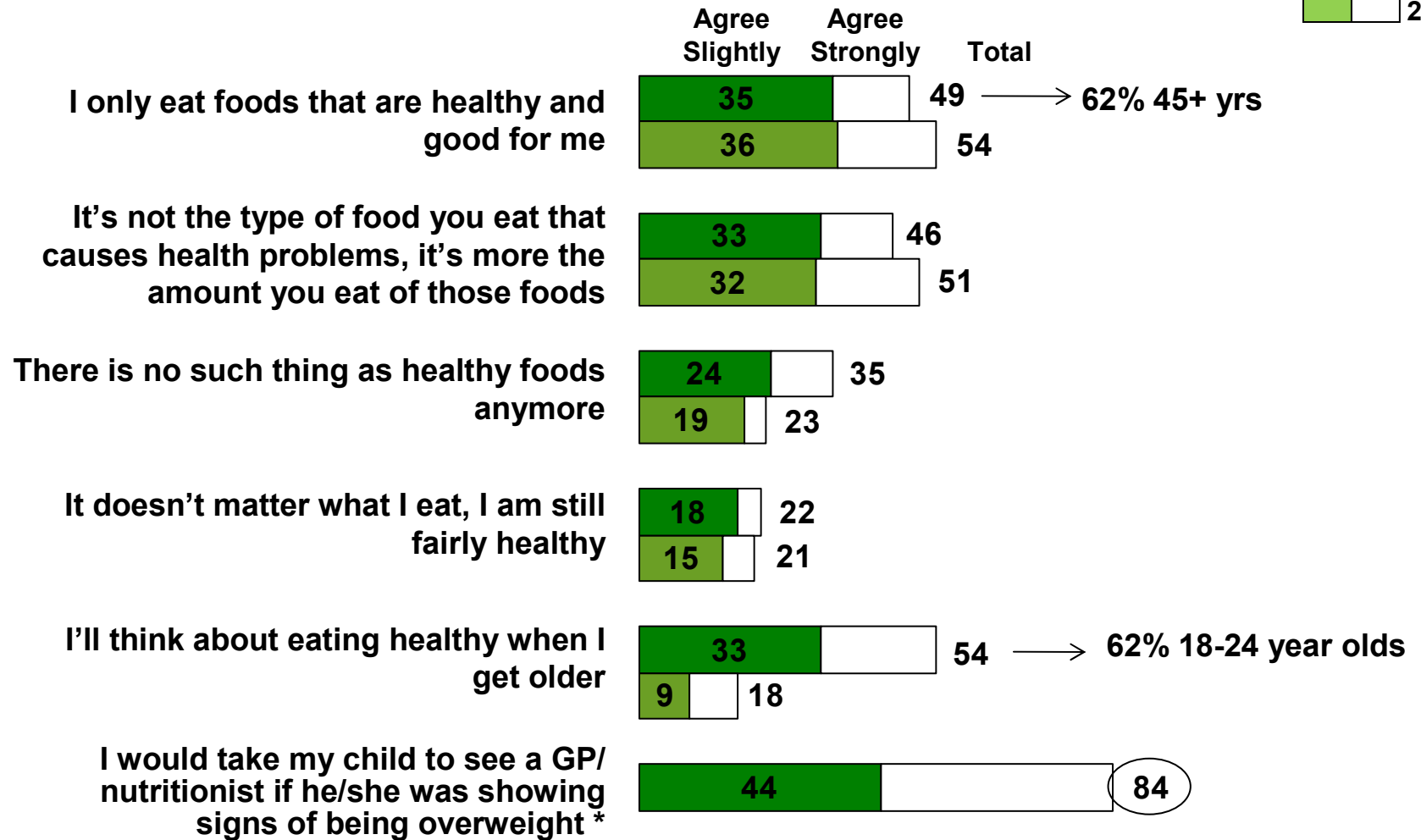
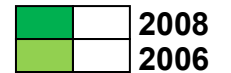
Good diet important for healthy mind

(Base: All Adults 18+ - Spain)



Weight a big concern for parents

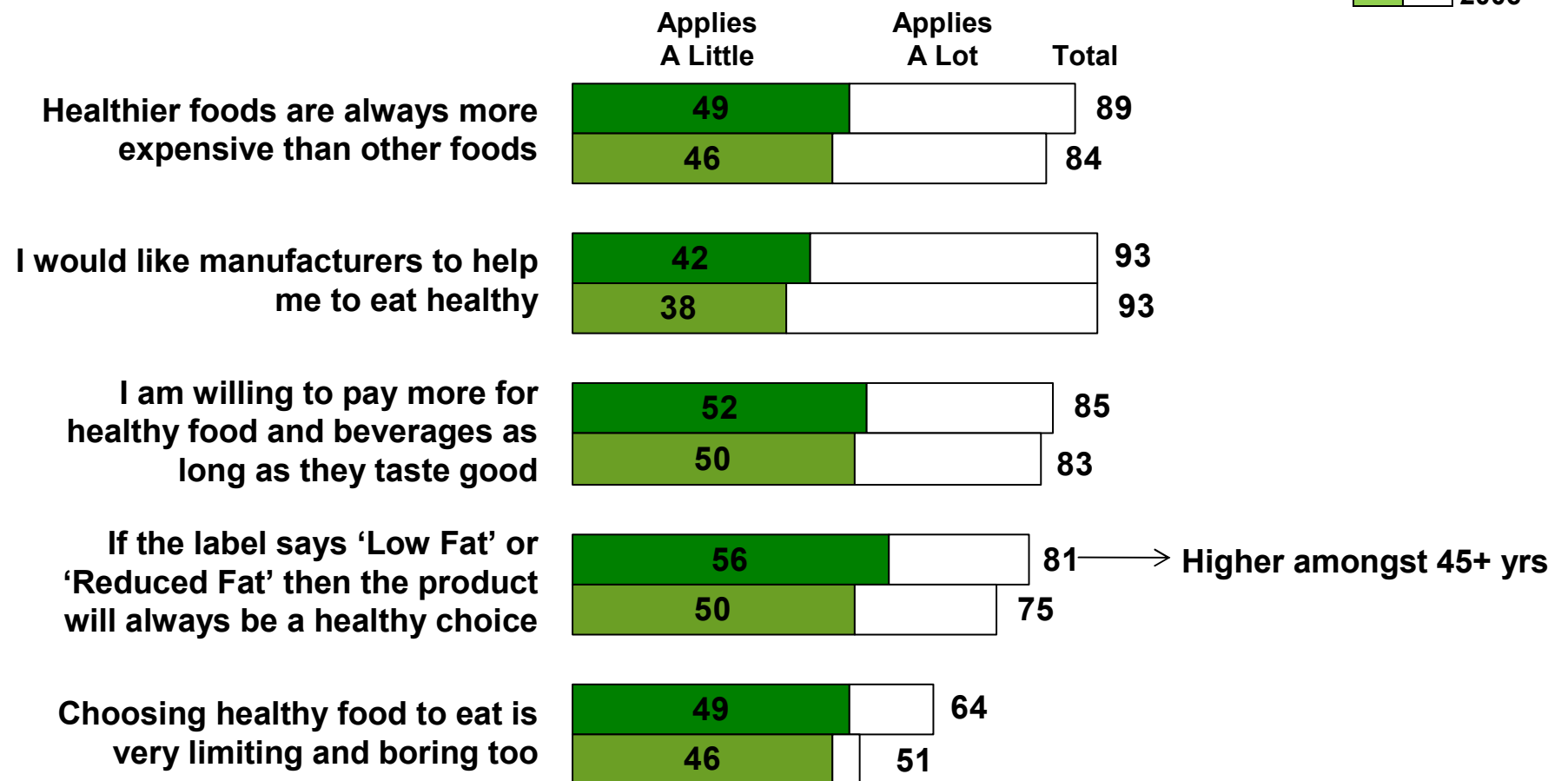
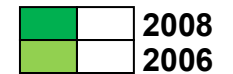
(Base: All Adults 18+ - Spain)



*New question added 2008
Base: Those with children

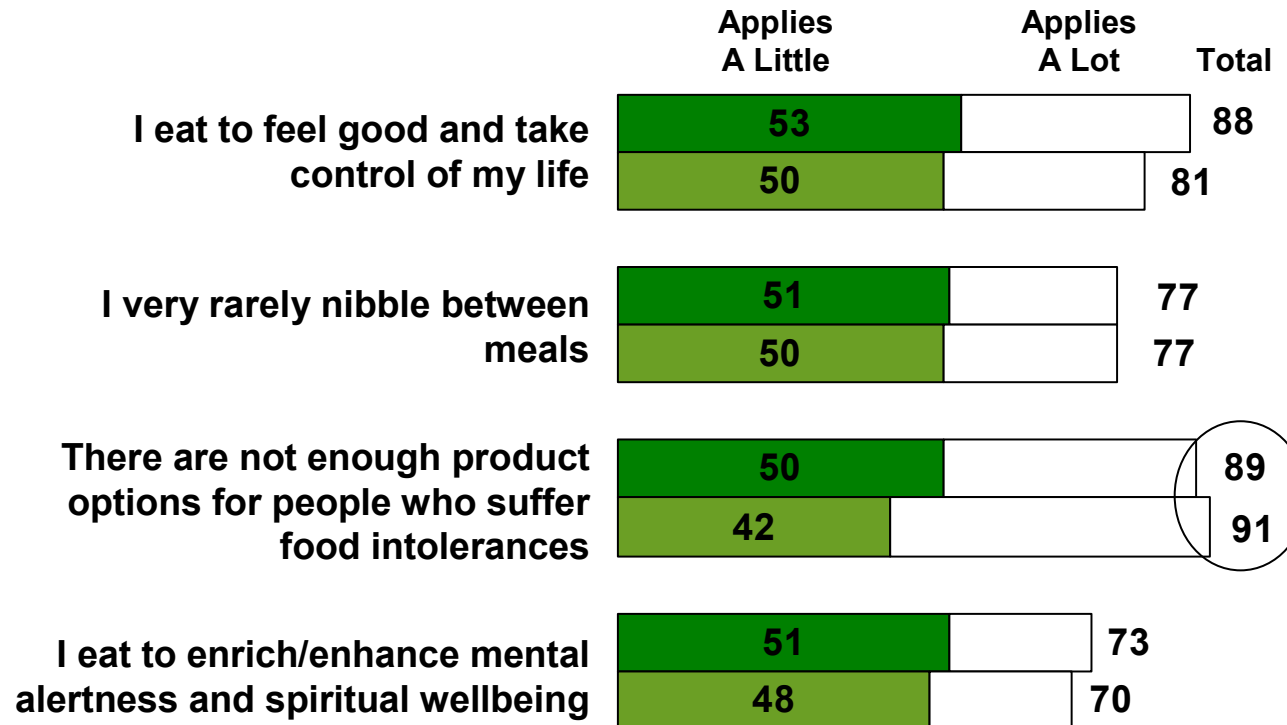
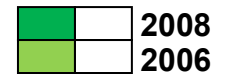
Healthy foods expensive but worth it

(Base: All Adults 18+ - Spain)



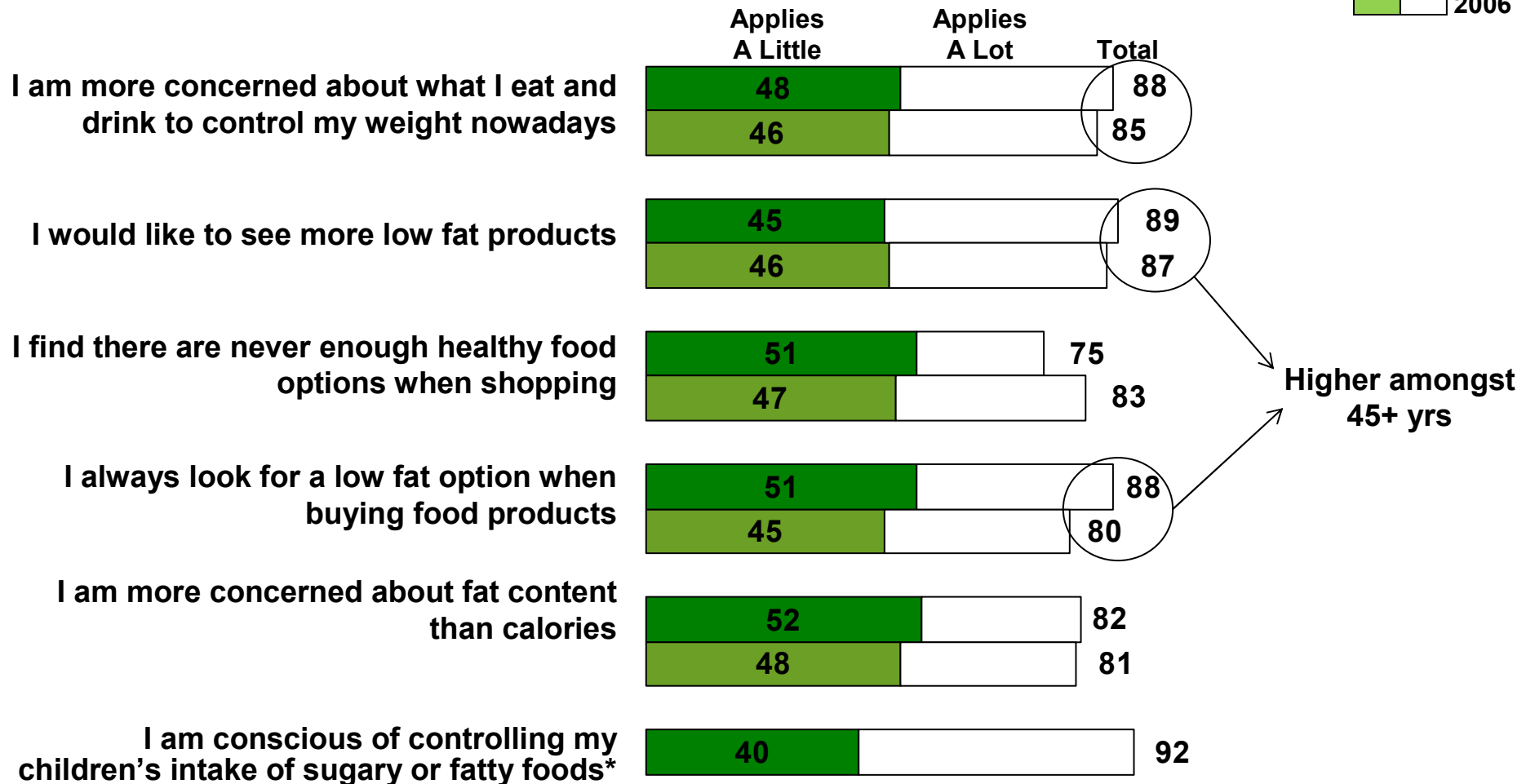
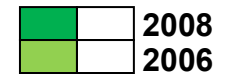
Not enough options for food intolerances

(Base: All Adults 18+ - Spain)



Weight conscious & looking for healthy options

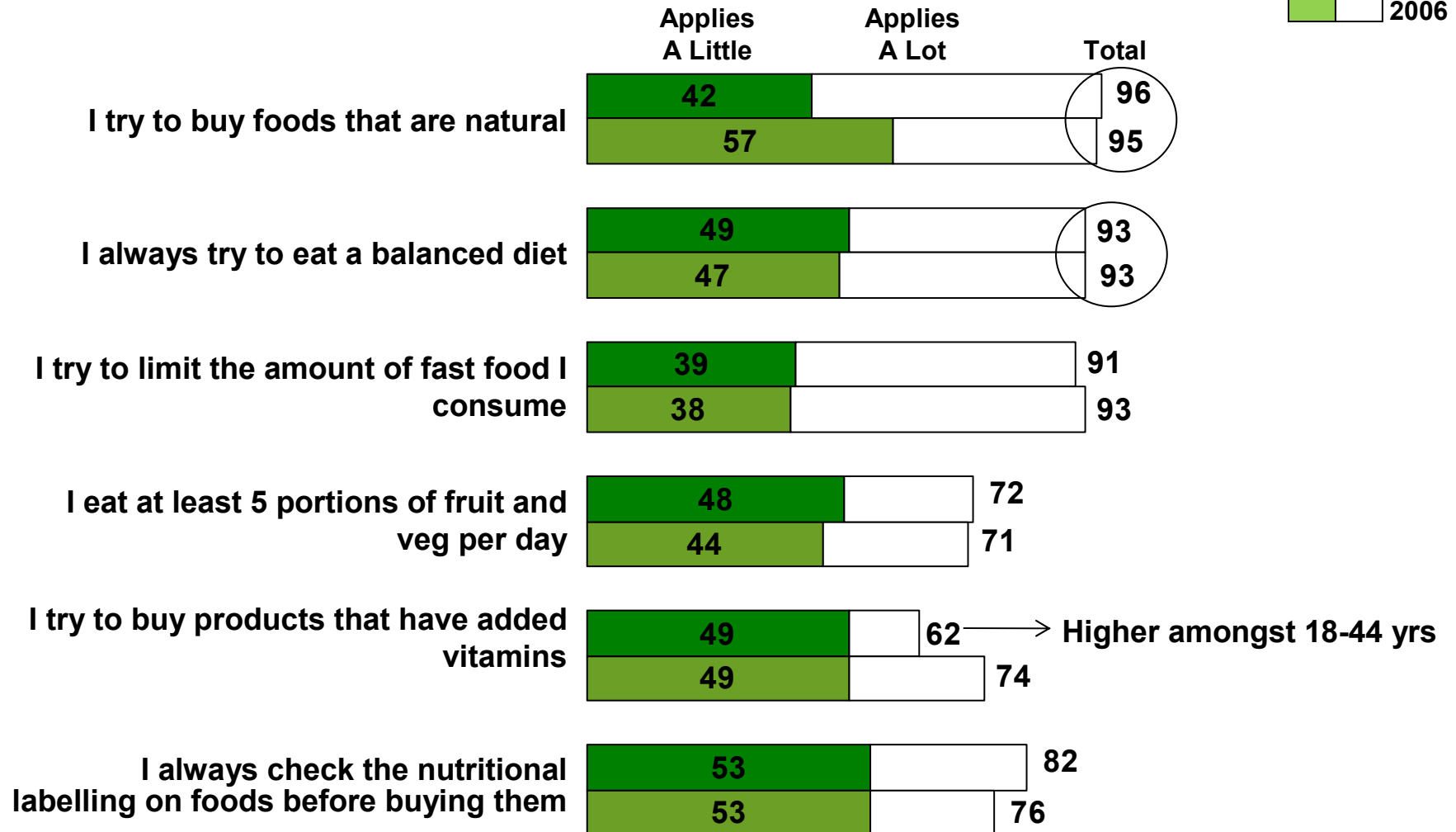
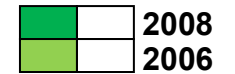
(Base: All Adults 18+ - Spain)



* New question added 2008

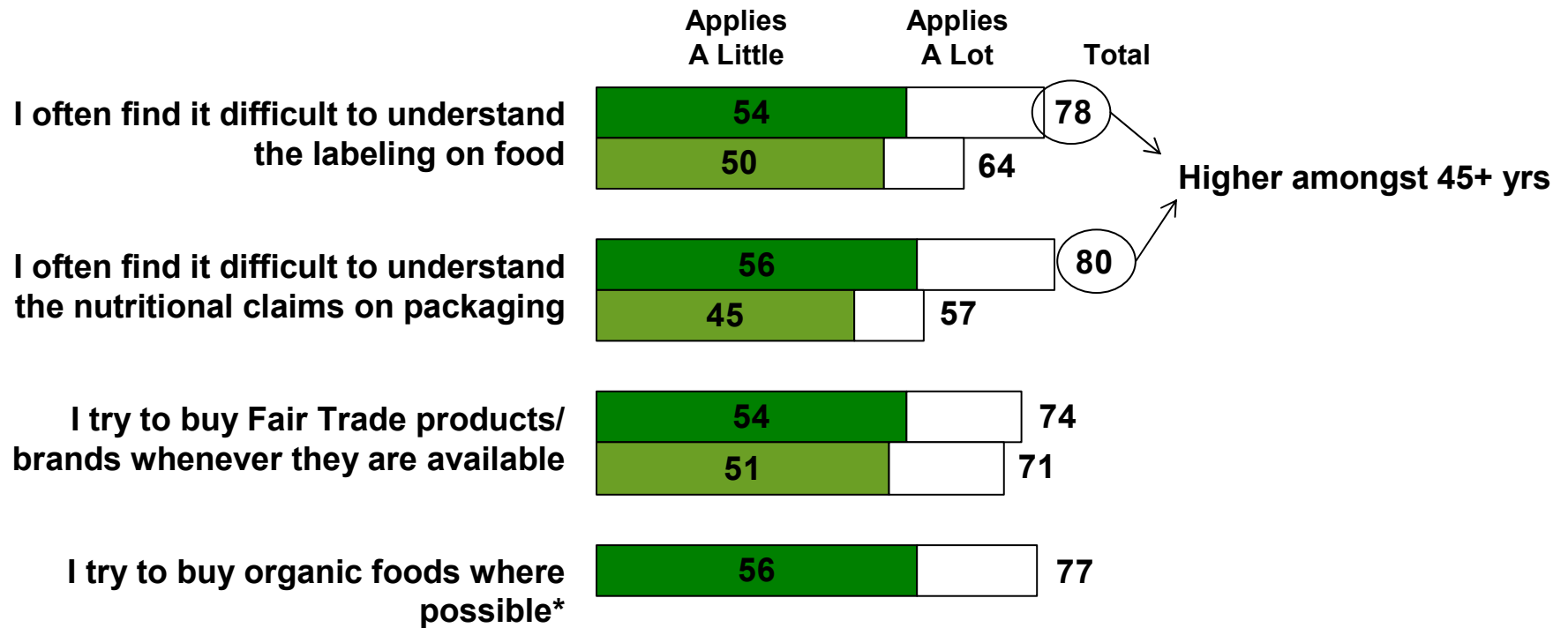
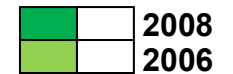
Aim for balanced, healthy diet

(Base: All Adults 18+ - Spain)



Increases in difficulty of understanding labels

(Base: All Adults 18+ - Spain)



* New question added 2008

SECTION 5: Environmental Issues



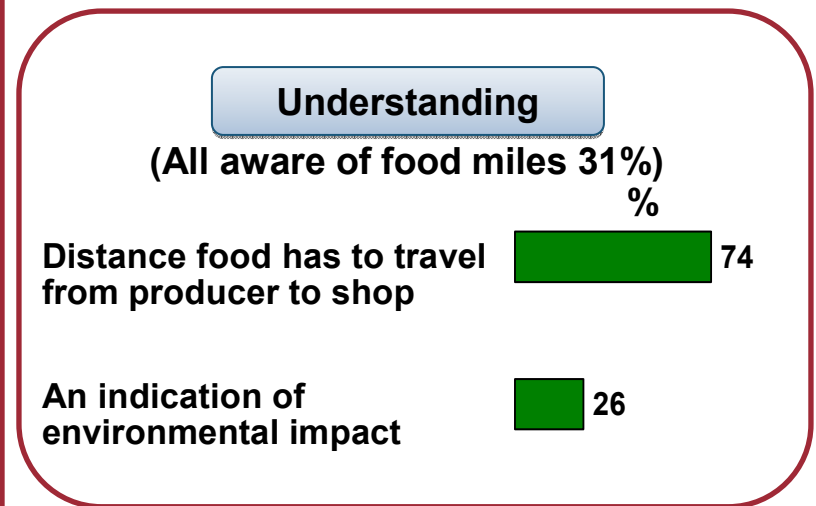
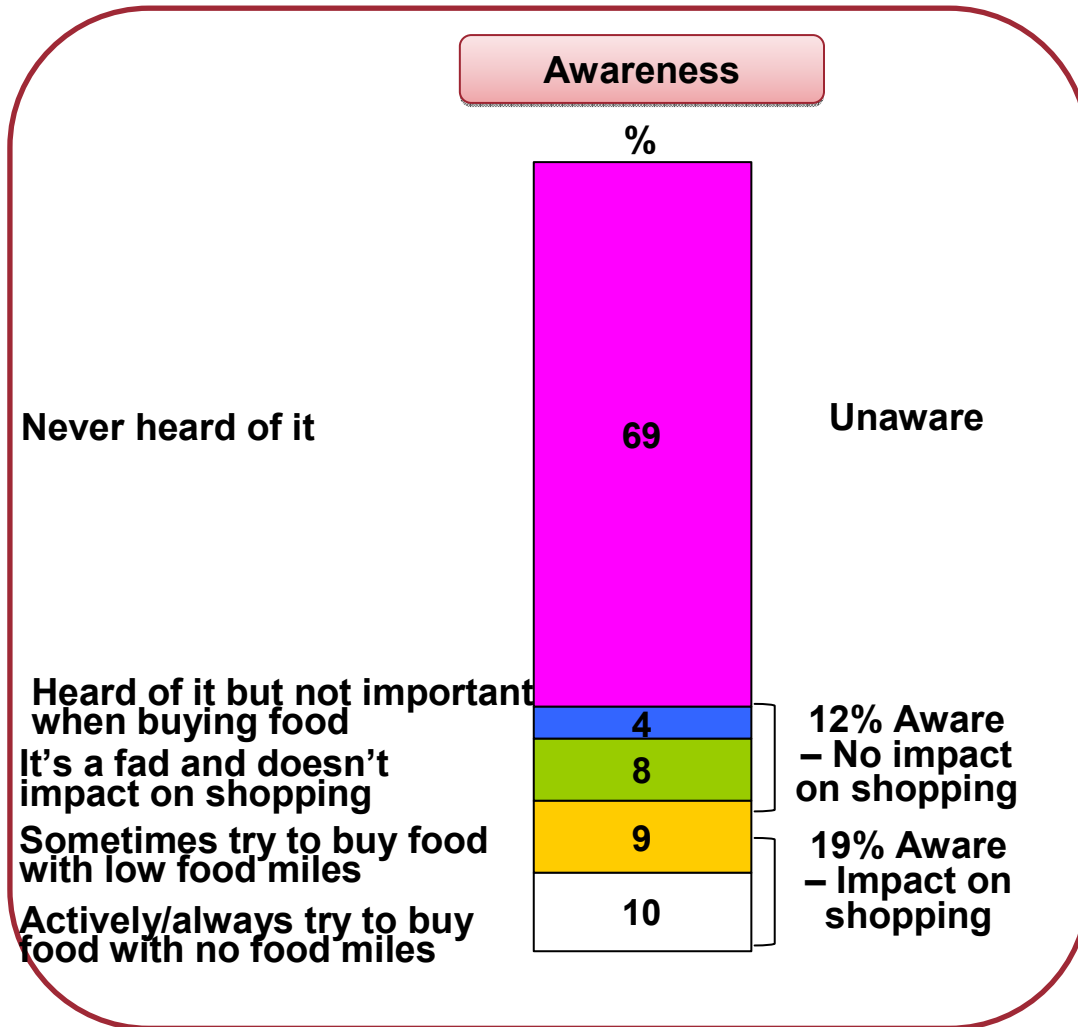
Environmental issues summary points

- ◆ **Three in ten Spaniards are aware of food miles while one fifth claim it impacts on shopping. The Spanish understand food miles to be the distance food travels from producer to shop.**
- ◆ **Significantly more are aware of sustainability – 73% aware, 28% of which consider sustainability when conducting their shopping. Half of all aware agree that sustainability is “meeting the needs of present without compromising the ability of future generations to meet their needs.”**
- ◆ **Two thirds of Spanish consumers are aware of carbon footprint with one fifth looking to buy products with low/no carbon footprint when doing their shopping.**
- ◆ **There is and overall claimed increased awareness of environmental issues when shopping.**



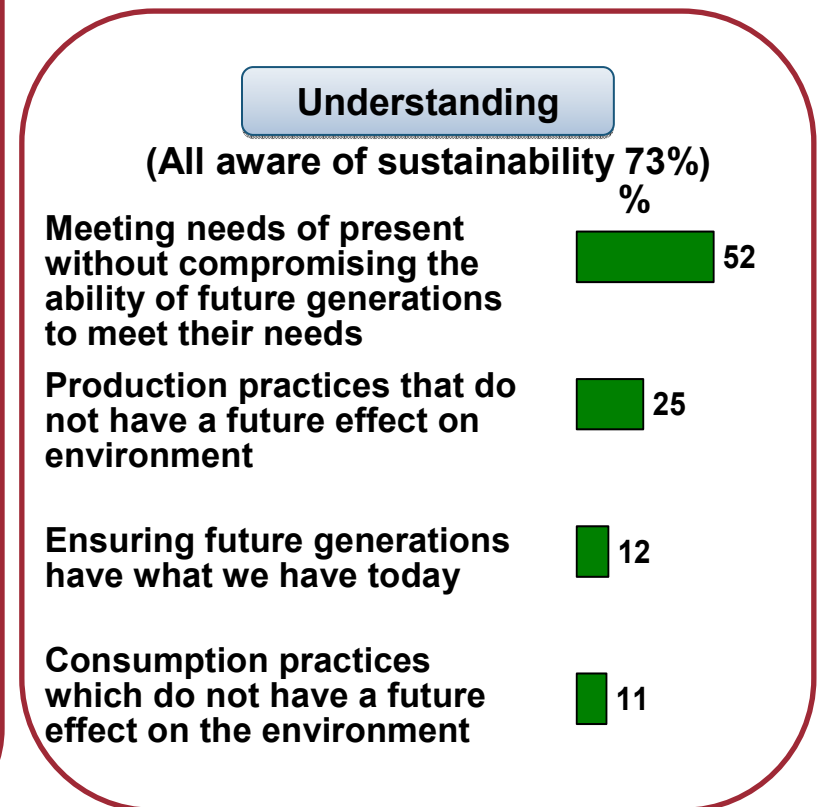
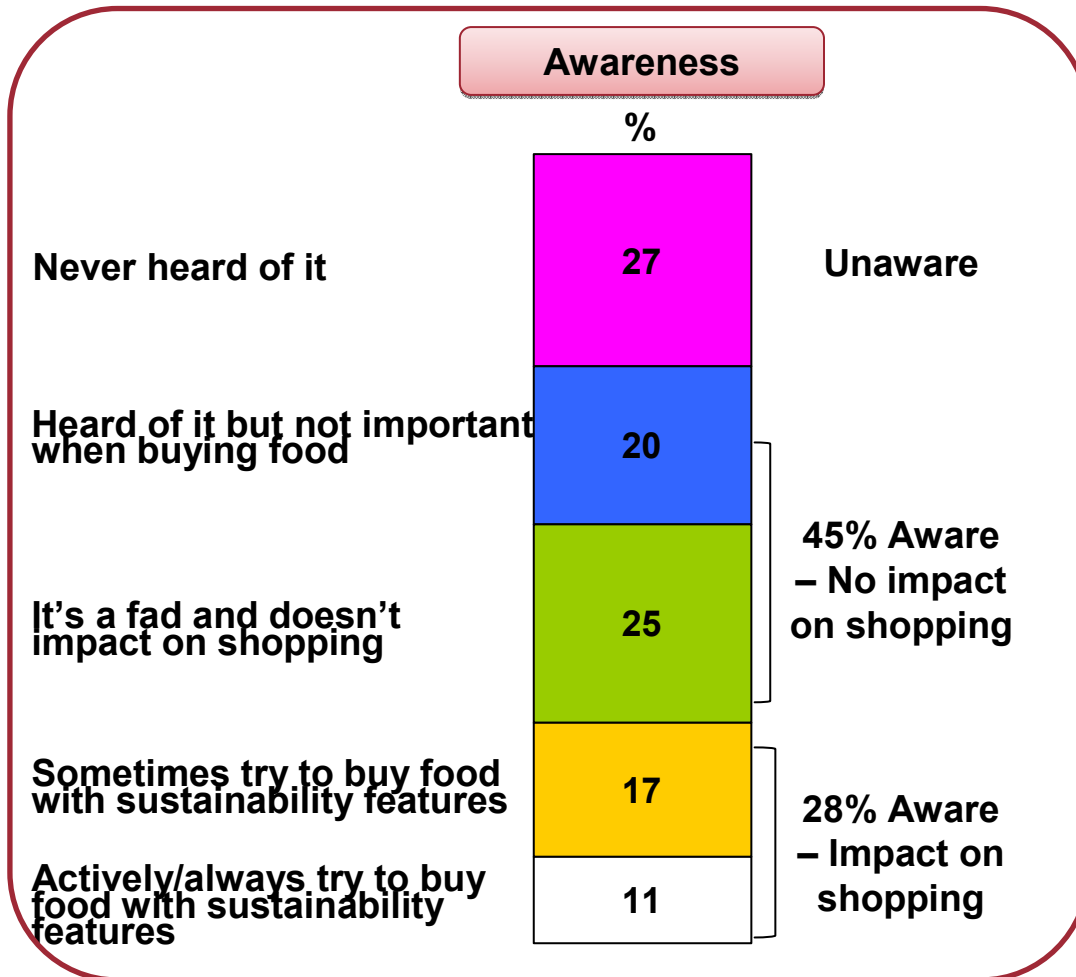
Largely unaware of food miles

(Base: All adults 18+ Years)



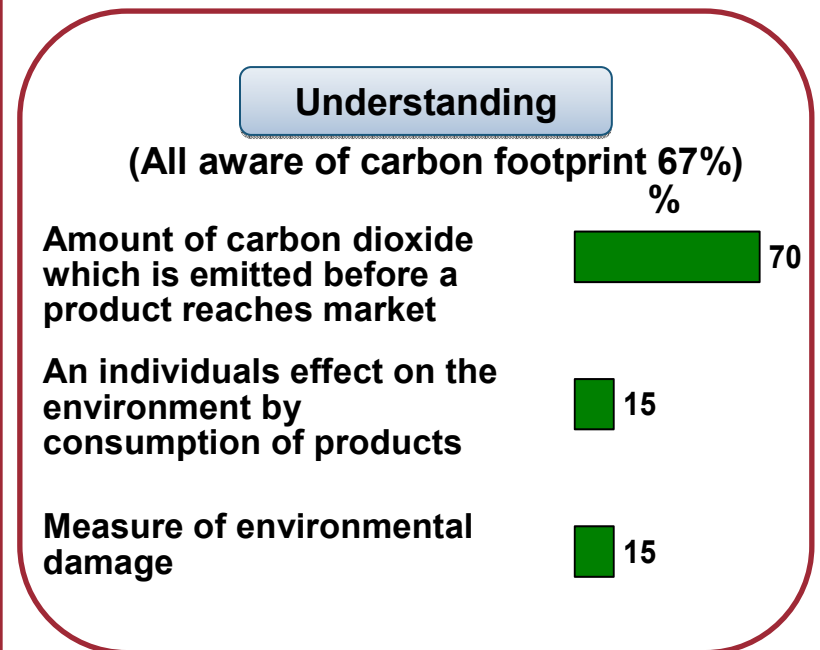
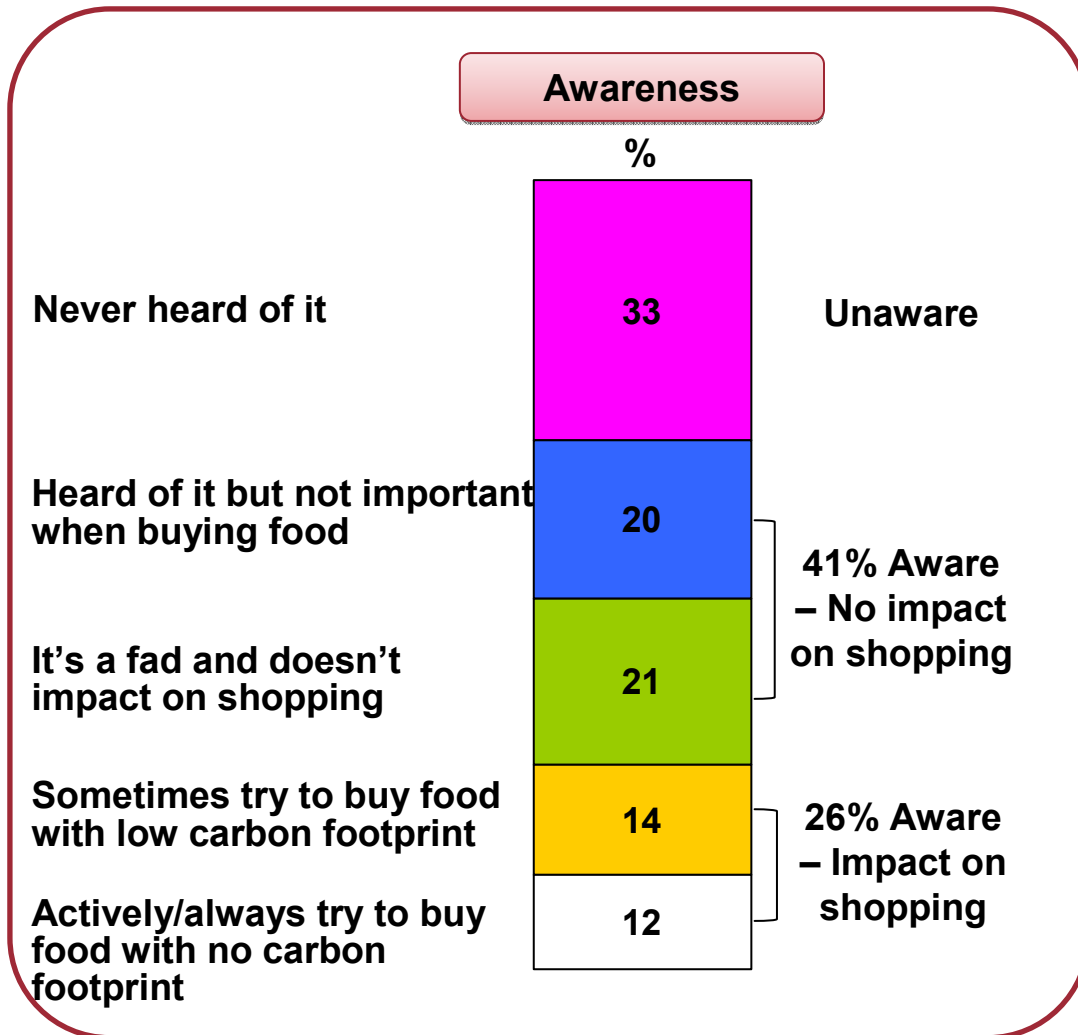
Almost three in ten influenced by sustainability

(Base: All adults 18+ Years)



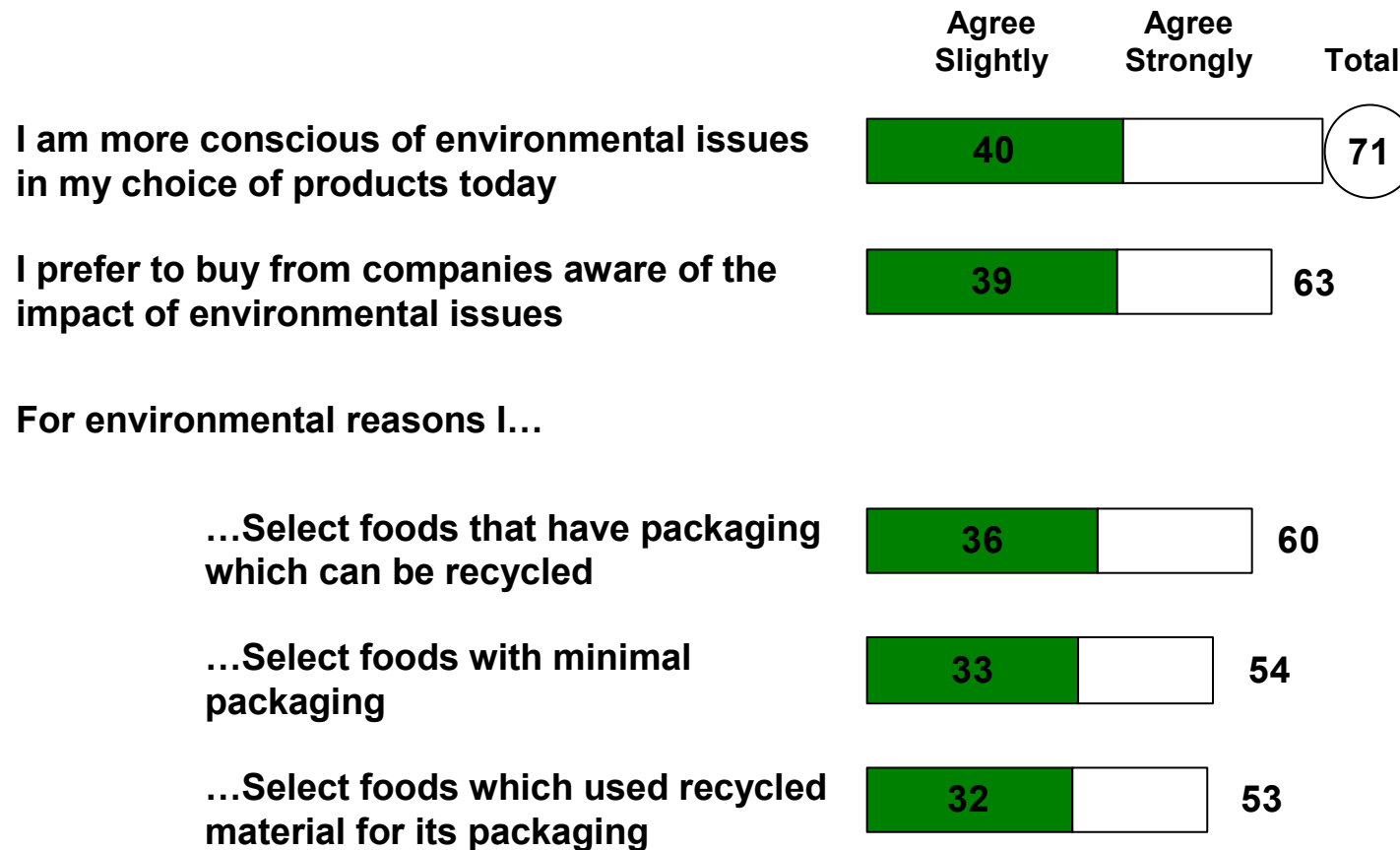
Two thirds aware of carbon footprint

(Base: All adults 18+ Years)



Claimed environmentally friendly behaviour

(Base: All Adults 18+ - Spain)



* New question added 2008

SECTION 6: Grocery Shopping



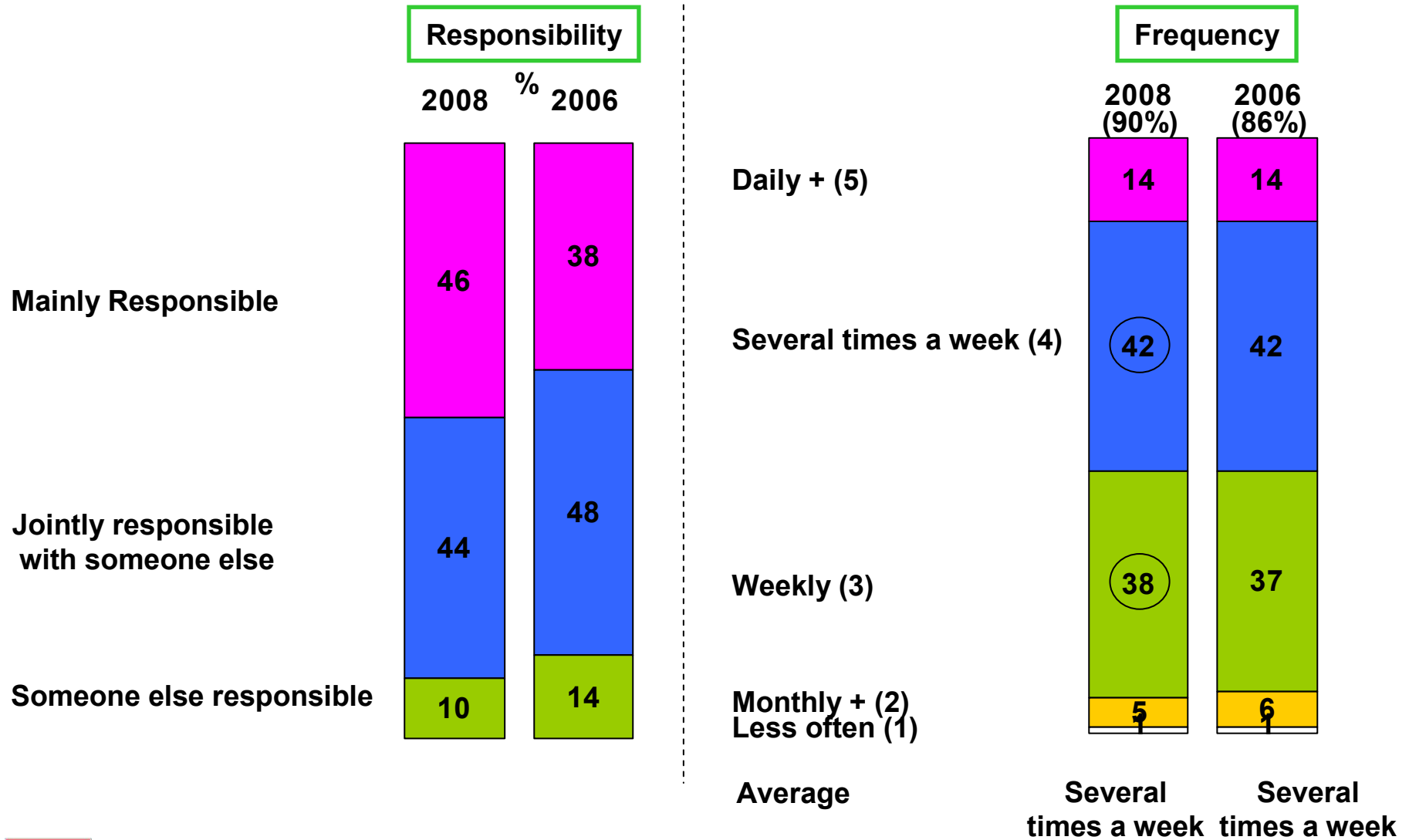
Grocery shopping summary points

- ◆ **Grocery shopping is split by those who shop weekly – four in ten and those who shop several times a week – also four in ten, main responsibility for grocery shopping falls to females.**
- ◆ **Quality is important but Spanish shoppers also looking for best value. Price is not the most important factor but they look out for price promotions and some compare prices between outlets (one in two).**
- ◆ **Younger Spanish shoppers (18-34 years) are more price conscious.**
- ◆ **Weekly shopping is planned around the meals for the week, little evidence of impulse ‘bargain’ purchasers.**
- ◆ **Three quarters of Spanish shoppers prefer buying products from the chilled cabinet.**
- ◆ **High awareness of functional foods and fair trade products whilst glycemic index, glycemic loading and irradiated food show low awareness – between one fifth and three tenths.**



Shop several times a week

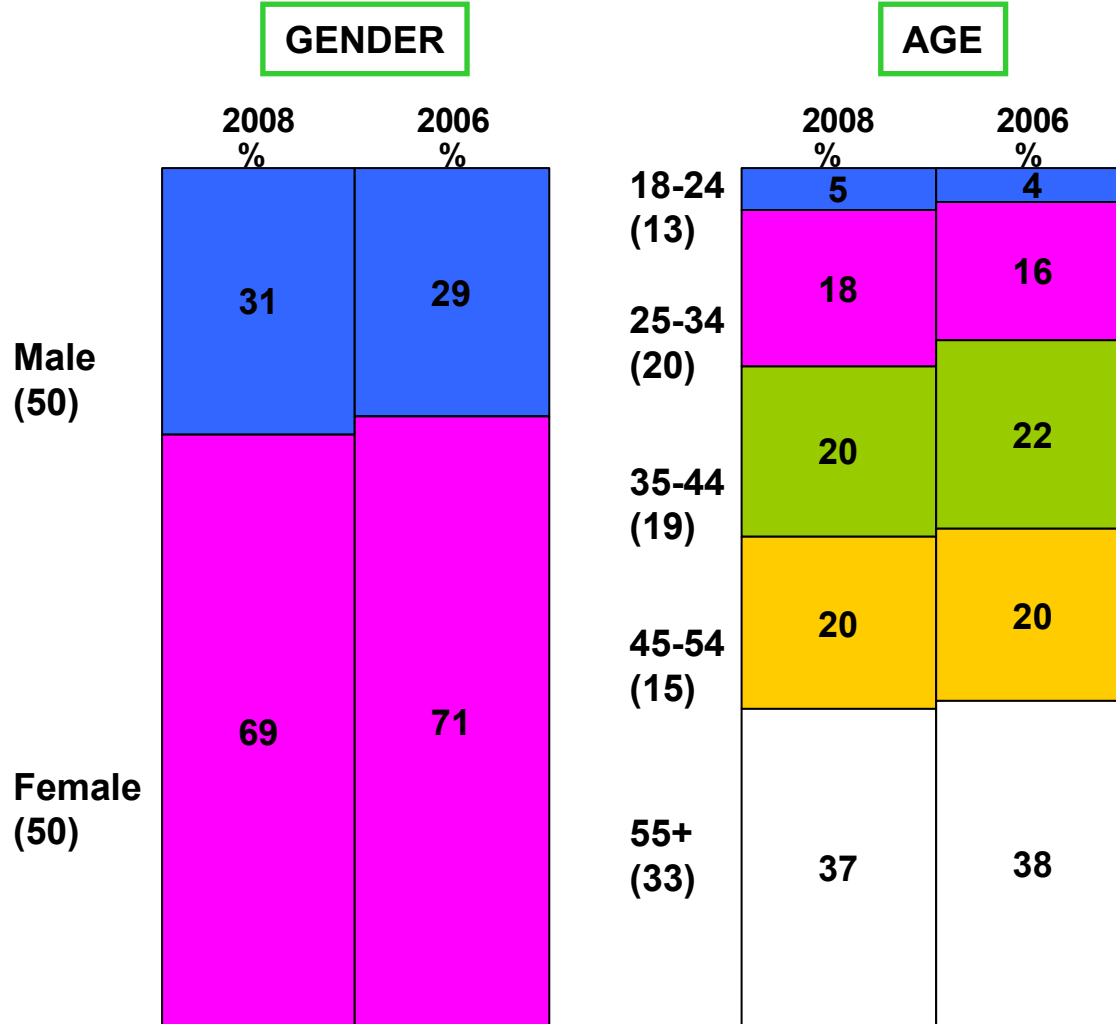
(Base: All Adults 18+ - Spain)



Females mainly responsible for grocery shopping

(Base: All mainly responsible for grocery shopping – 2006 - 38%, 2008 – 46%)

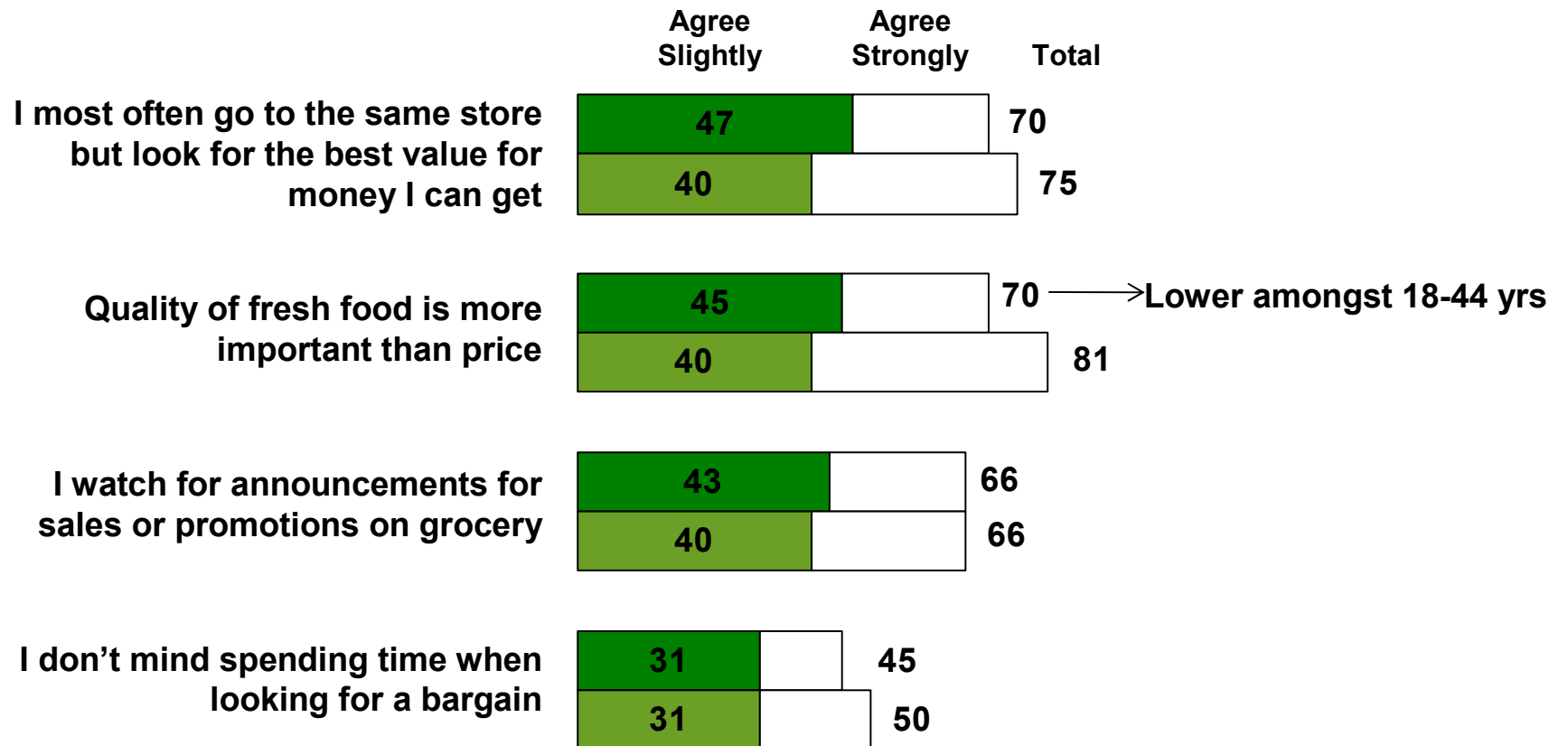
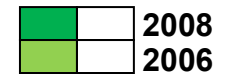
Profile of Grocery Shoppers



() = Total Spanish Population

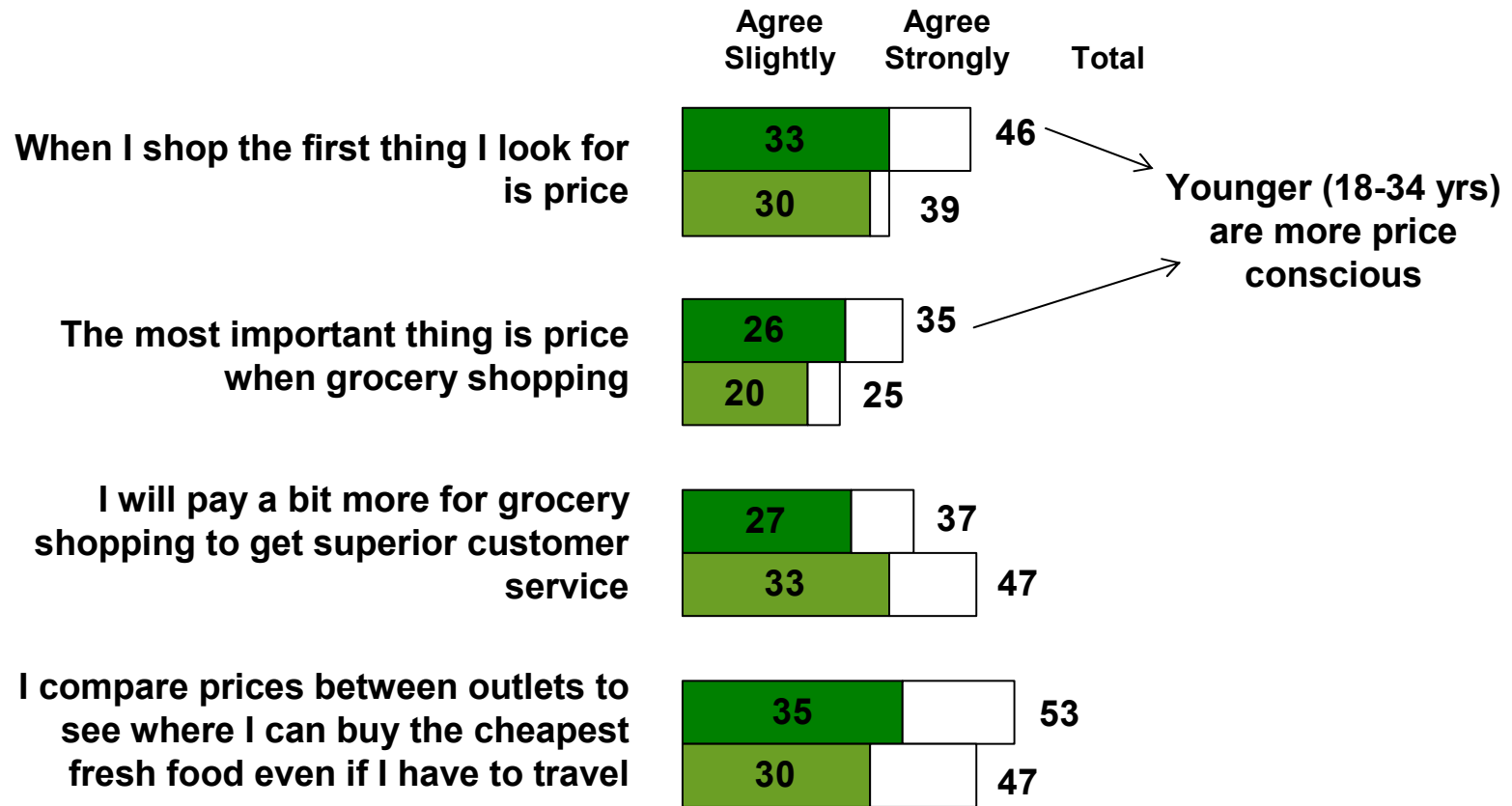
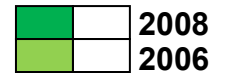
Looking for value and quality

(Base: All Adults 18+ - Spain)



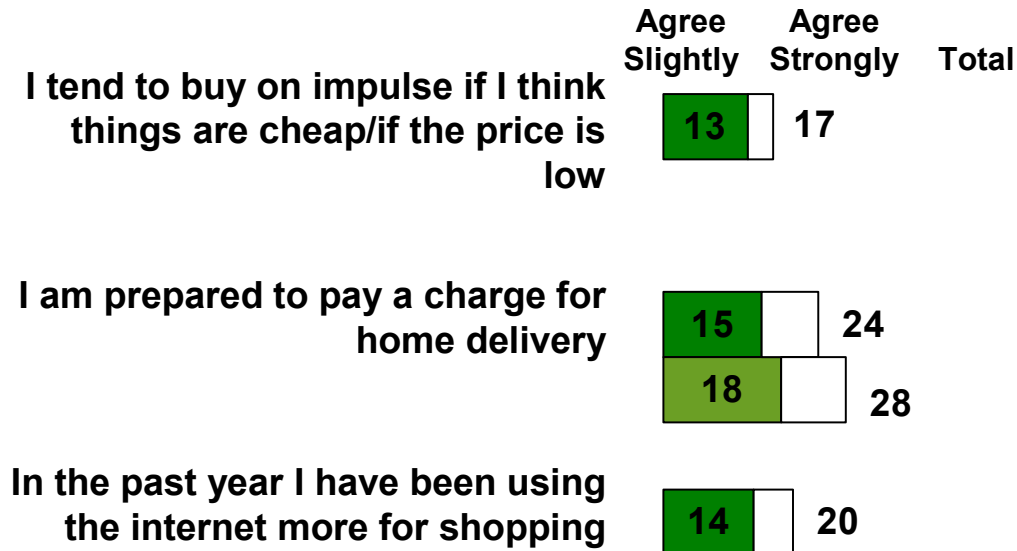
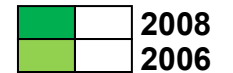
Price is not most important but increasing

(Base: All Adults 18+ - Spain)



Little impulse buying

(Base: All Adults 18+ - Spain)

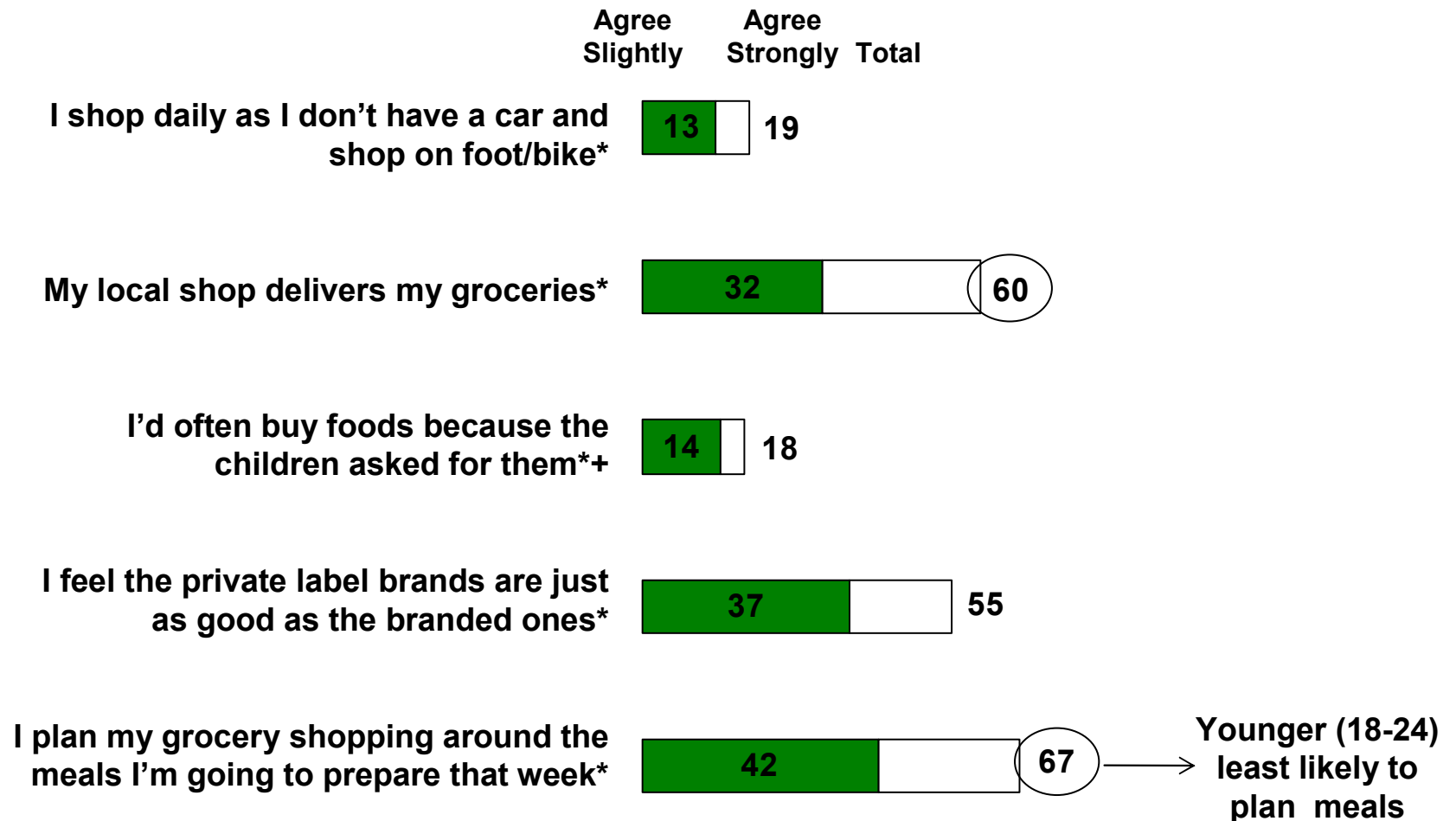


Younger Spanish 18-34 are more likely to impulse shop and more likely to shop on internet.



Organised in weekly shopping and meals

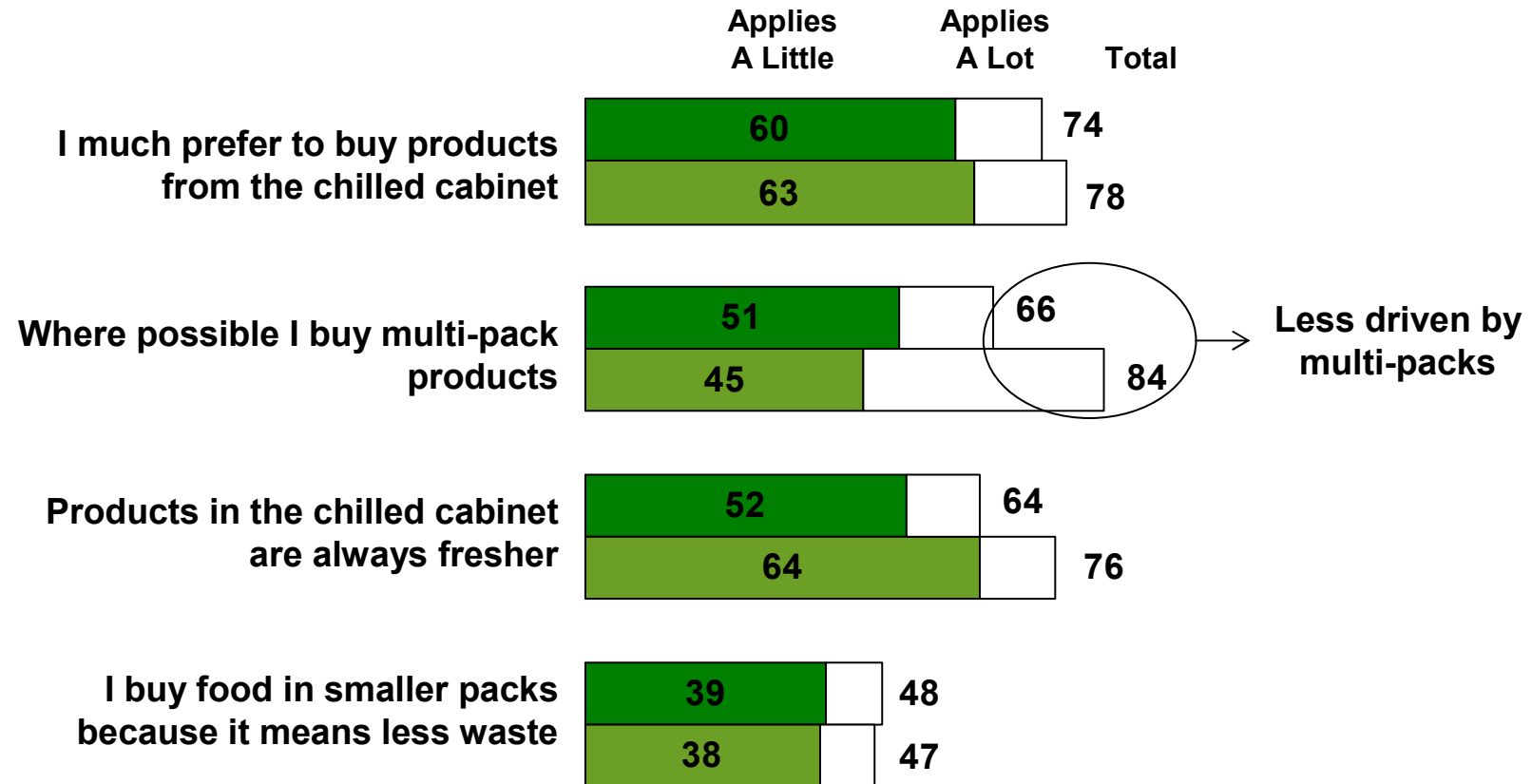
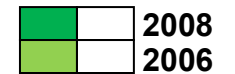
(Base: All Adults 18+ - Spain)



*New question added 2008
+Base: Those with children

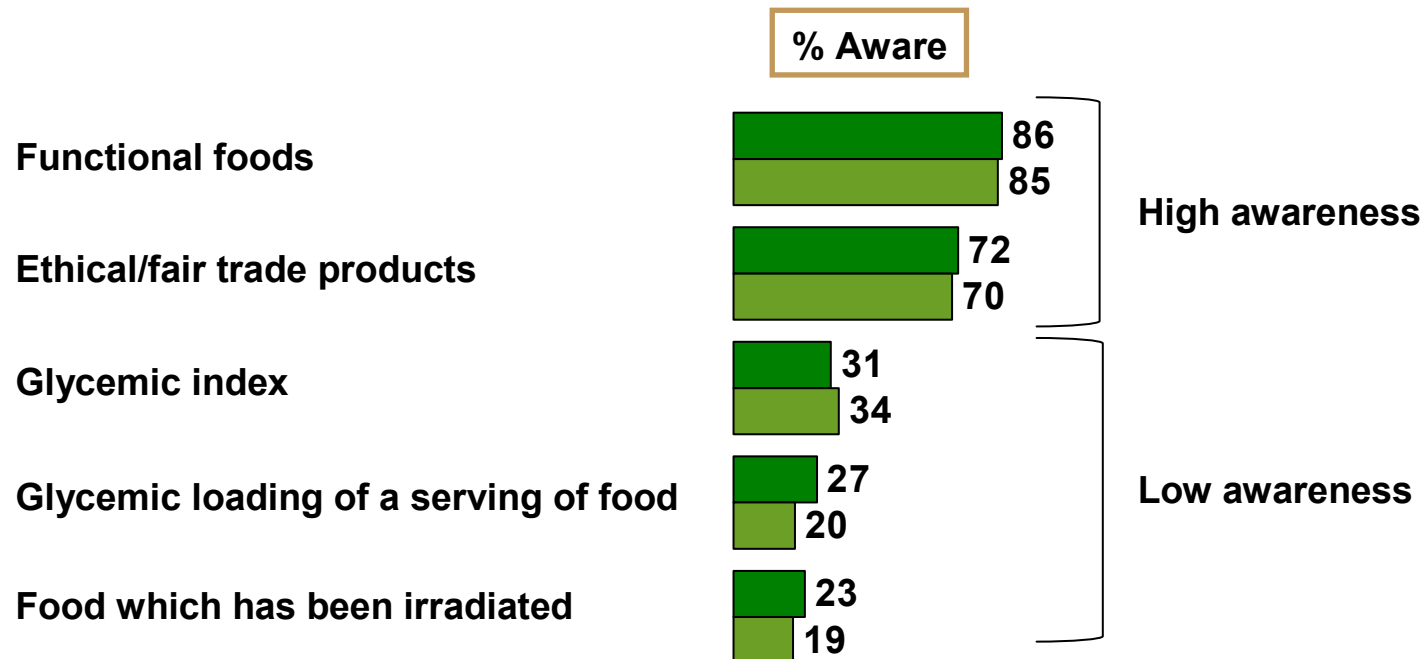
Favour the chilled cabinet

(Base: All Adults 18+ - Spain)



Similar awareness of food terms to 2006

(Base: All Adults 18+ - Spain)

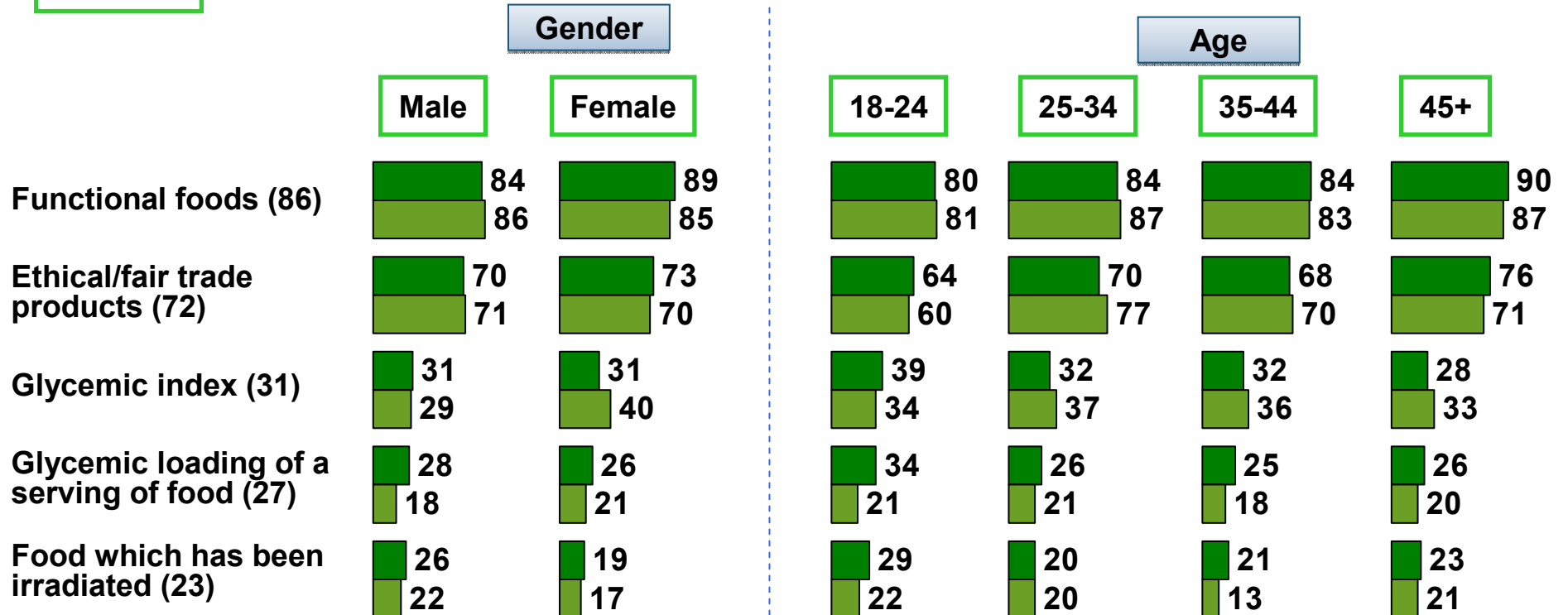


Little variation in awareness by gender or age

(Base: All Adults 18+ - Spain)

2008
2006

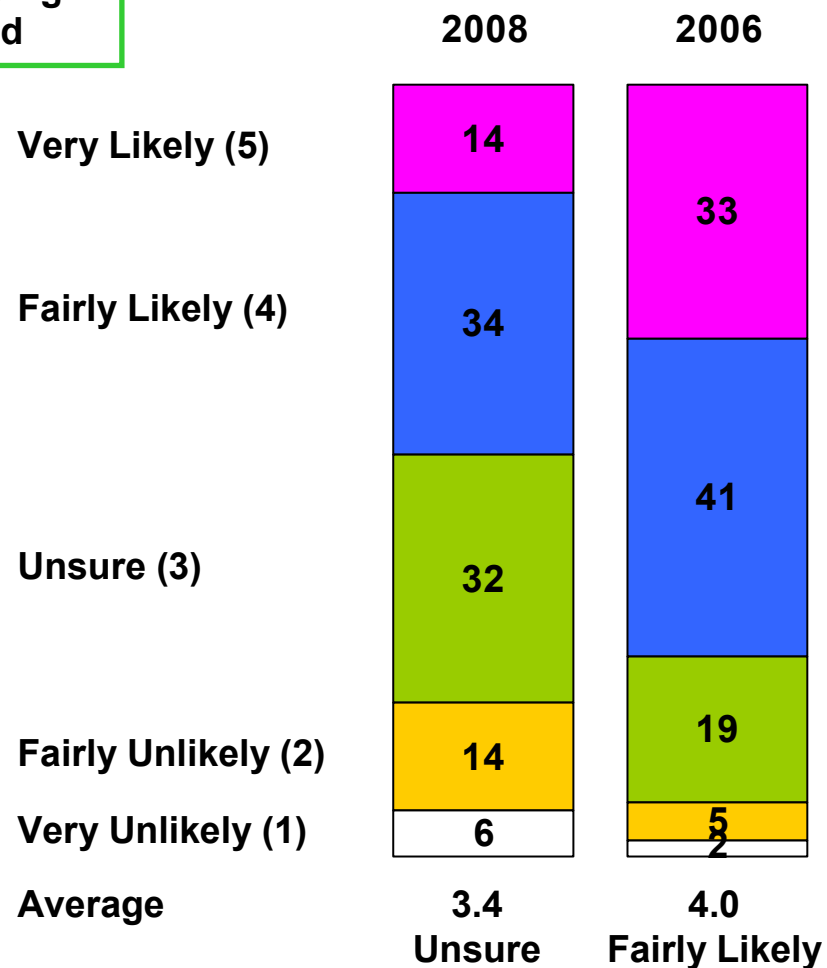
% Aware



Decrease in purchase interest for functional foods

(Base: All Adults 18+ - Spain, aware of functional food – 86%)

Likelihood of Buying Functional Food



SECTION 7: Local Food



Local food summary points

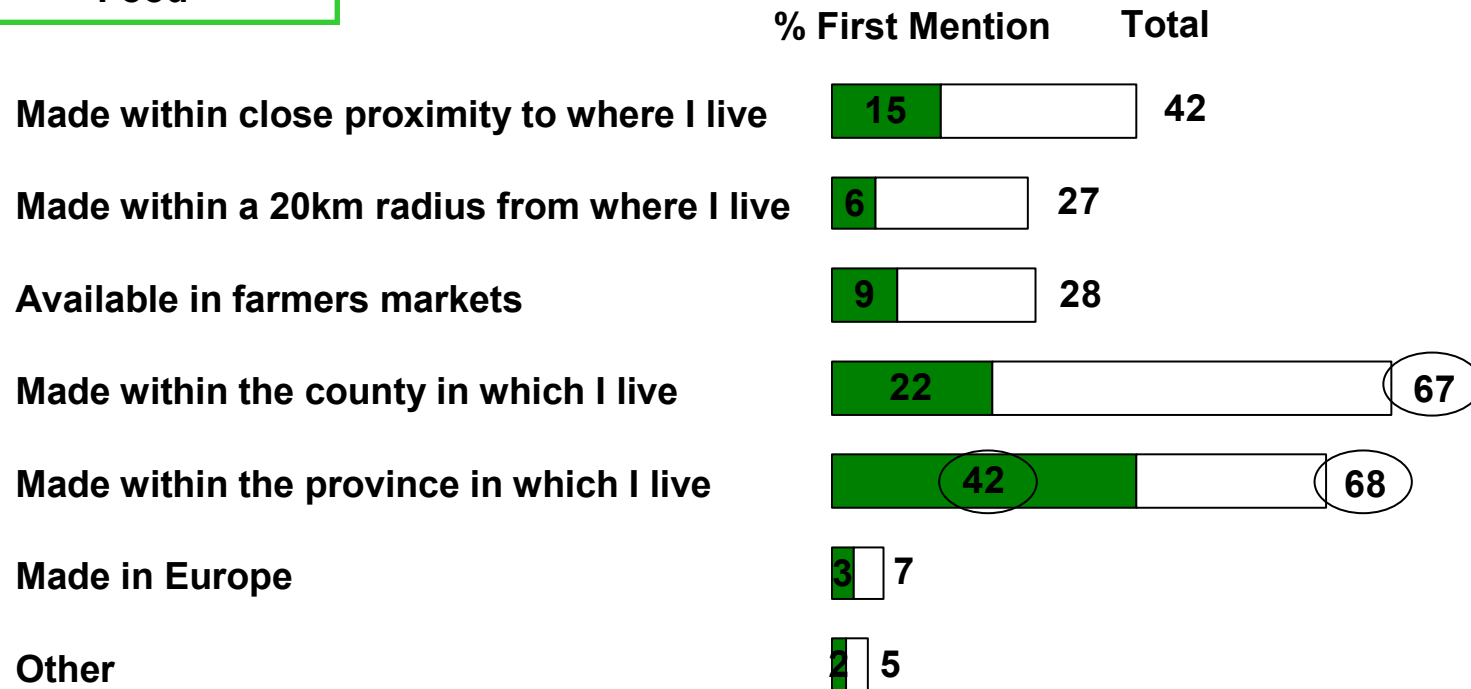
- ◆ **Local means within the province for Spaniards, the county is a second consideration of the meaning.**
- ◆ **Increasing importance in line with increasing age, high proportion of 34-44 year olds saying neither/nor to local produce.**
- ◆ **56% buy weekly, 20% buy daily – high frequency of purchasing local produce, highest amongst 45+ age bracket.**
- ◆ **Spanish like to know origin of food, most significant increases – more likely to believe in the quality of local produce, always check farm name on meat.**
- ◆ **Those living in the Madrid area are less likely to see local food as very important and report weaker attitudes to local food, and purchase it with less frequency.**



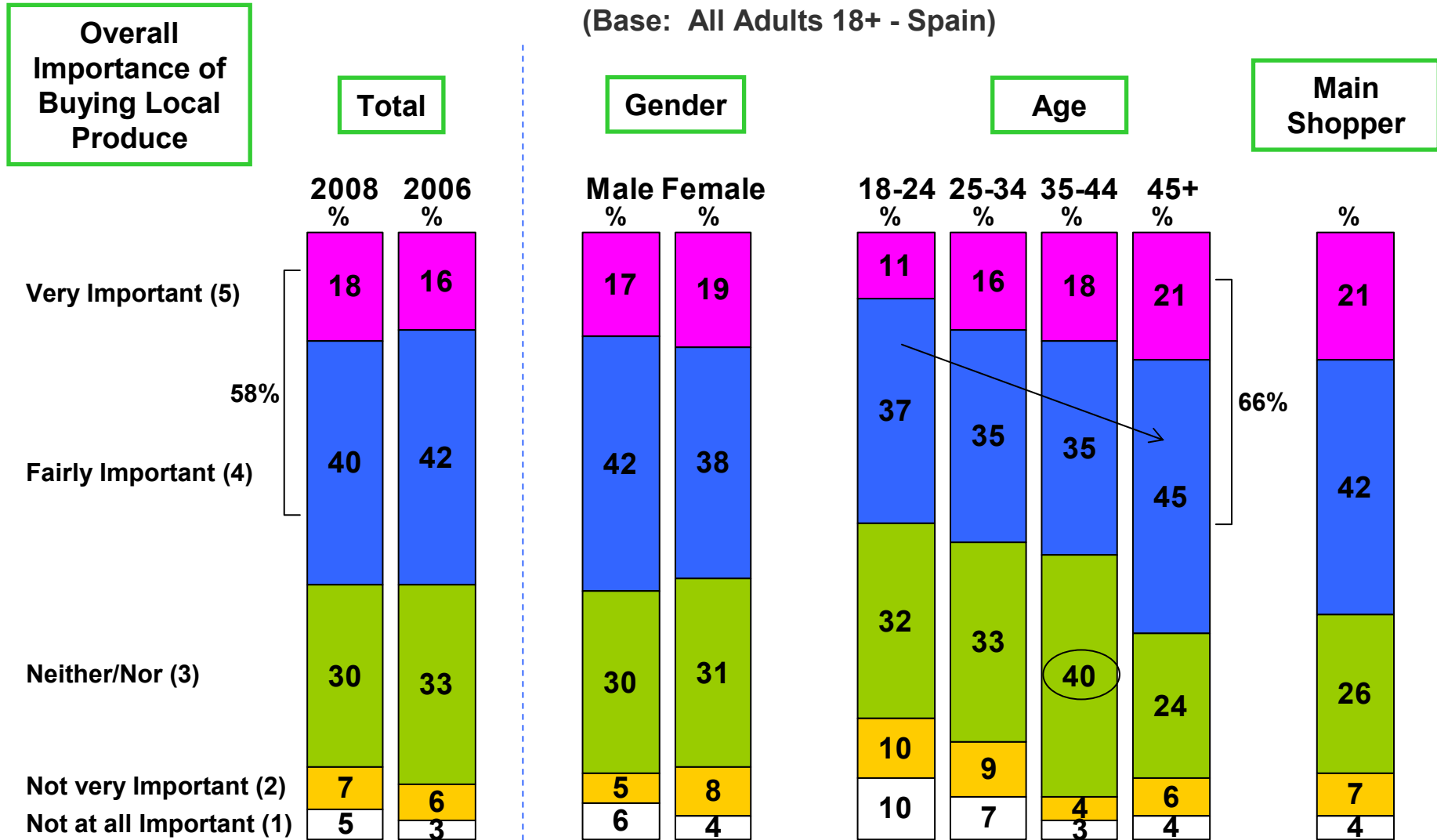
Local food is within the province or country

(Base: All adults 18+ Years)

Understanding of the Term “Local Food”



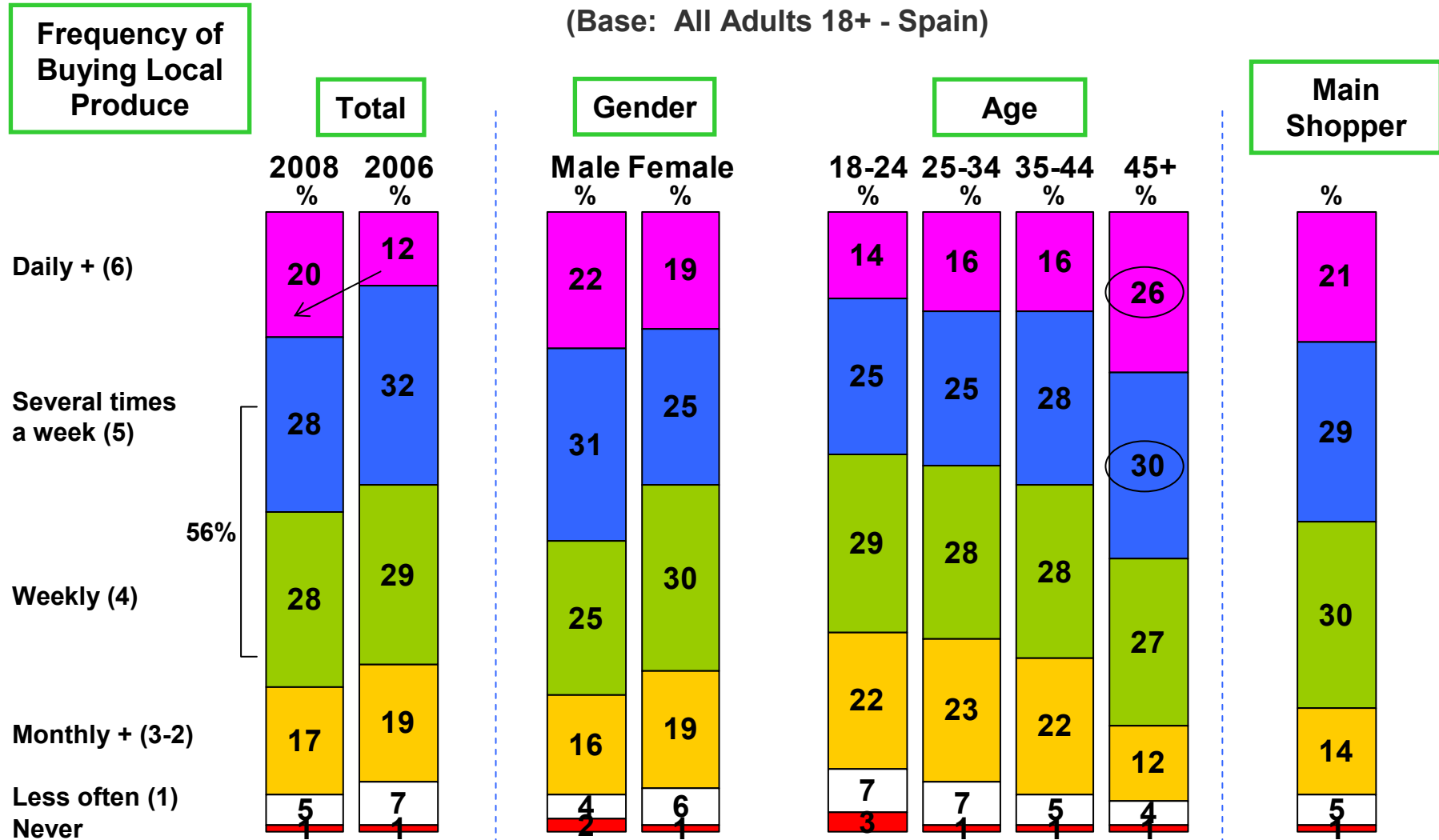
Local important to six in ten



Increasing importance in line with increasing age, high proportion of 34-44 year olds saying neither/nor to local produce.



One fifth buy local produce daily

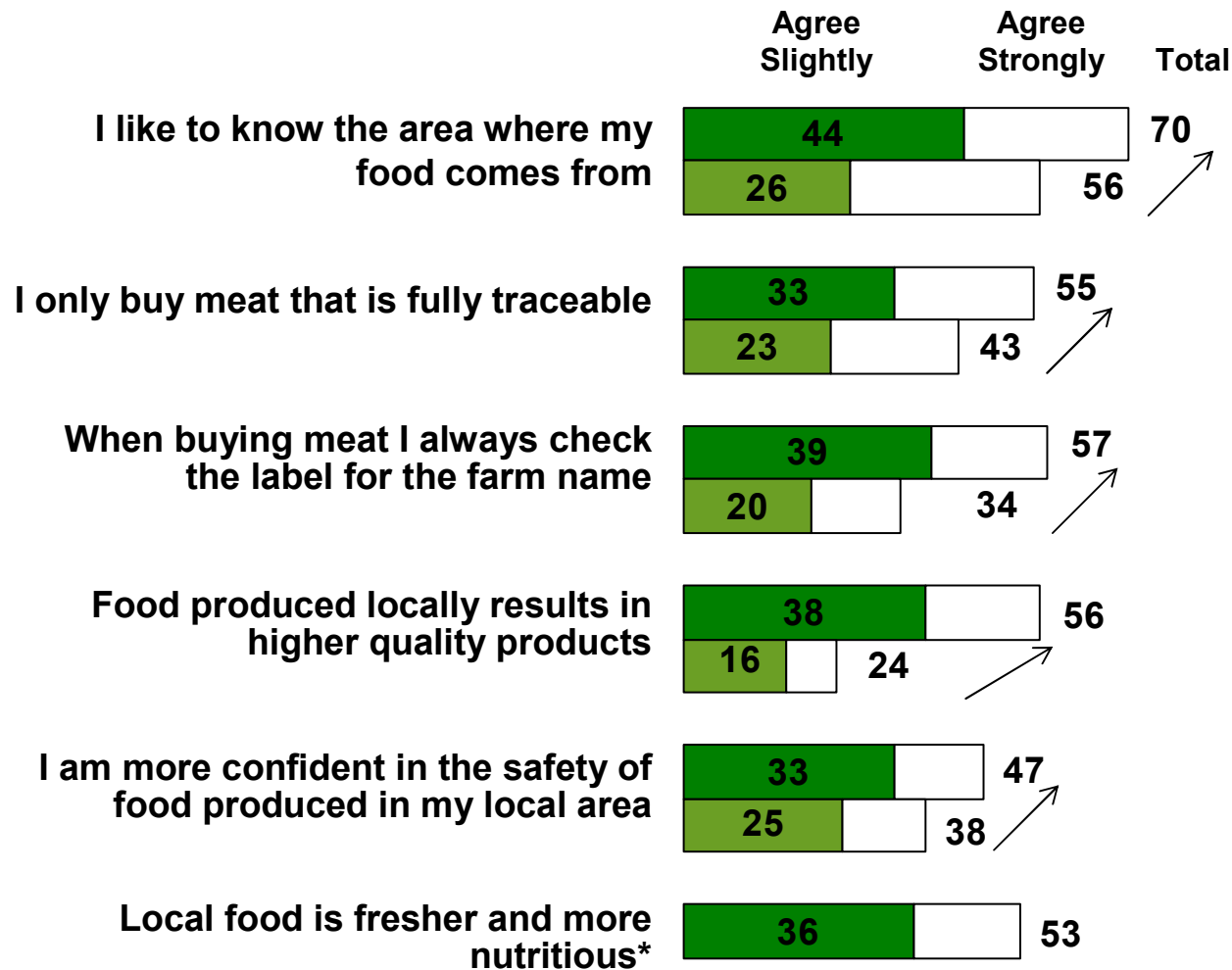
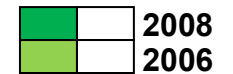


Highest frequency amongst 45+ age bracket.



Increase in positive perceptions of local

(Base: All Adults 18+ - Spain)



* New question added 2008

SECTION 8: Food Labelling



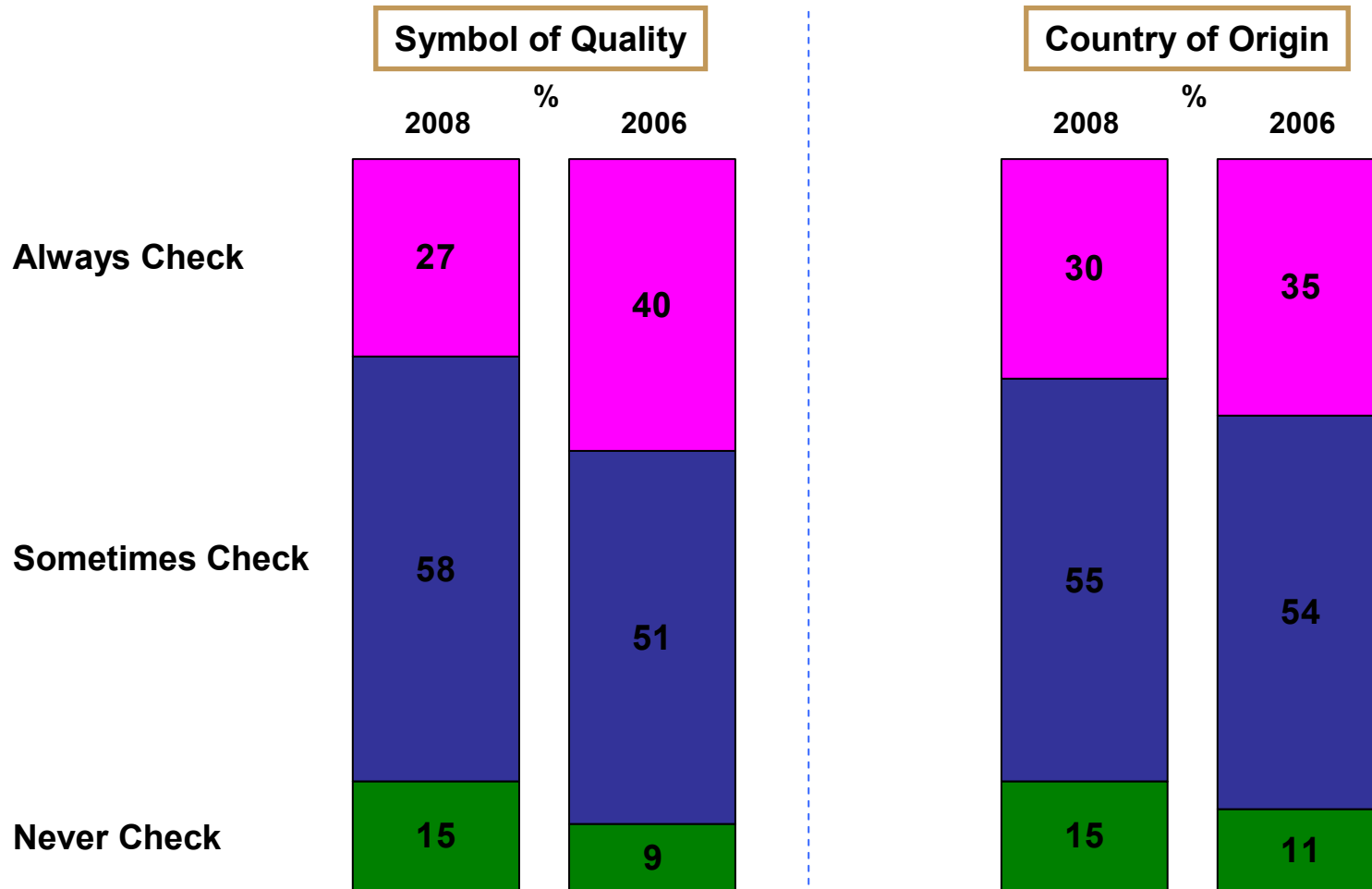
Attitudes towards labelling & alcohol summary points

- ◆ **Three in ten Spanish always check the country of origin, the Spanish are more likely than any of the other countries to always check for a quality symbol.**
- ◆ **Nine in ten rate “fresh” as being very/fairly important, through this presentation the Spanish have cited the importance of fresh, cooking from scratch, frequency of shopping implying they buy fresh foods several times a week. They associate “fresh” with fruit and vegetables.**
- ◆ **Again “natural” is rated as very important to the Spanish, for them it means no artificial ingredients, not fortified, not processed.**
- ◆ **Spanish on average drinking several times a week, just under four in ten Spanish consume alcohol with 80%+ of food occasions.**
- ◆ **One fifth often drinking during lunch time, over a quarter drink when dining at home mid week. Part of the Spanish lifestyle and culture.**



Three in ten always check country of origin

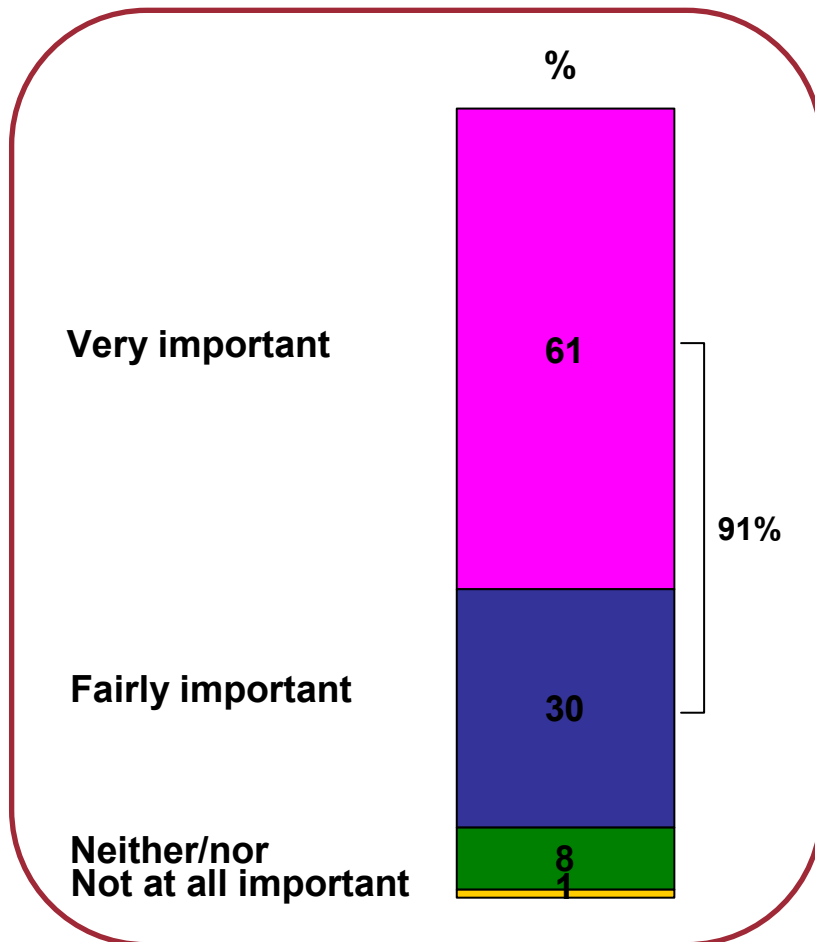
(Base: All Grocery Shoppers)



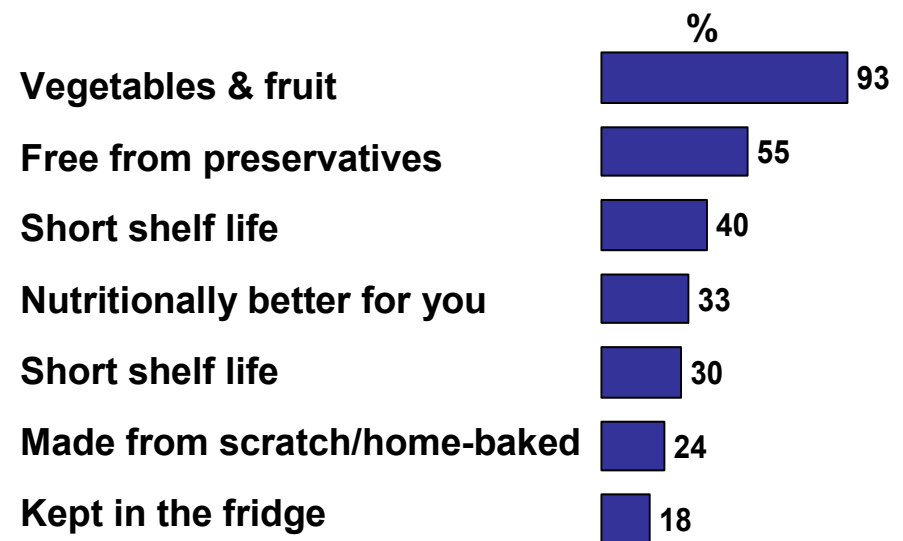
Nine in ten rate fresh very important

(Base: All adults 18+ - Spain)

Impact of 'Fresh' on Labels when Shopping



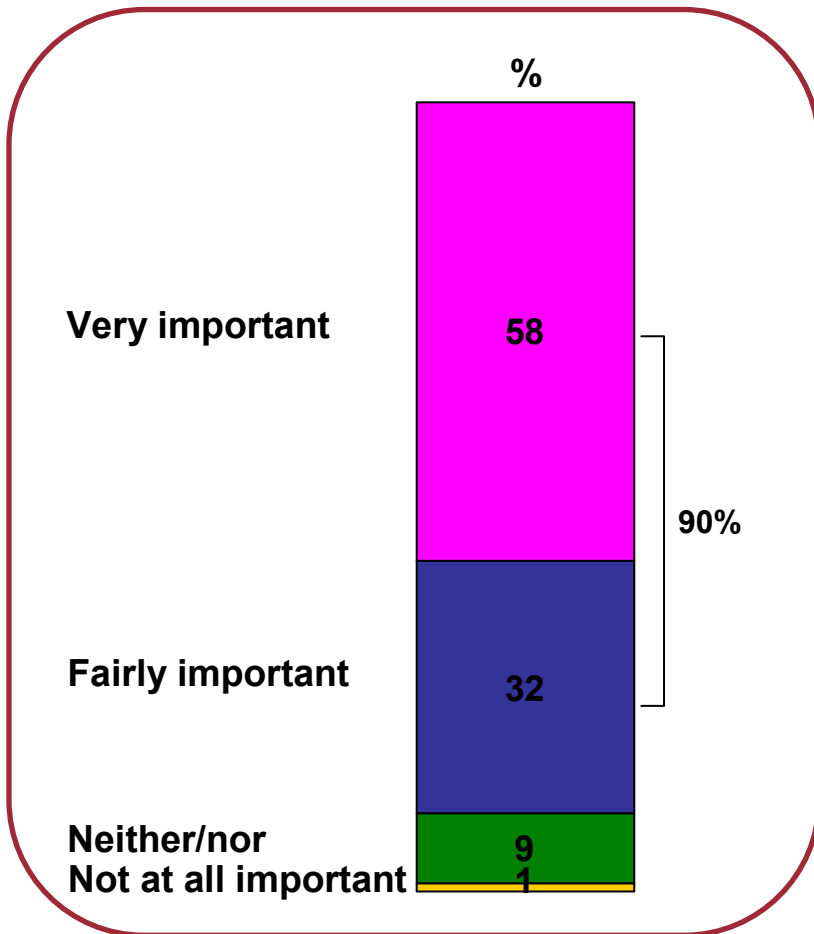
Fresh - Prompted Associations



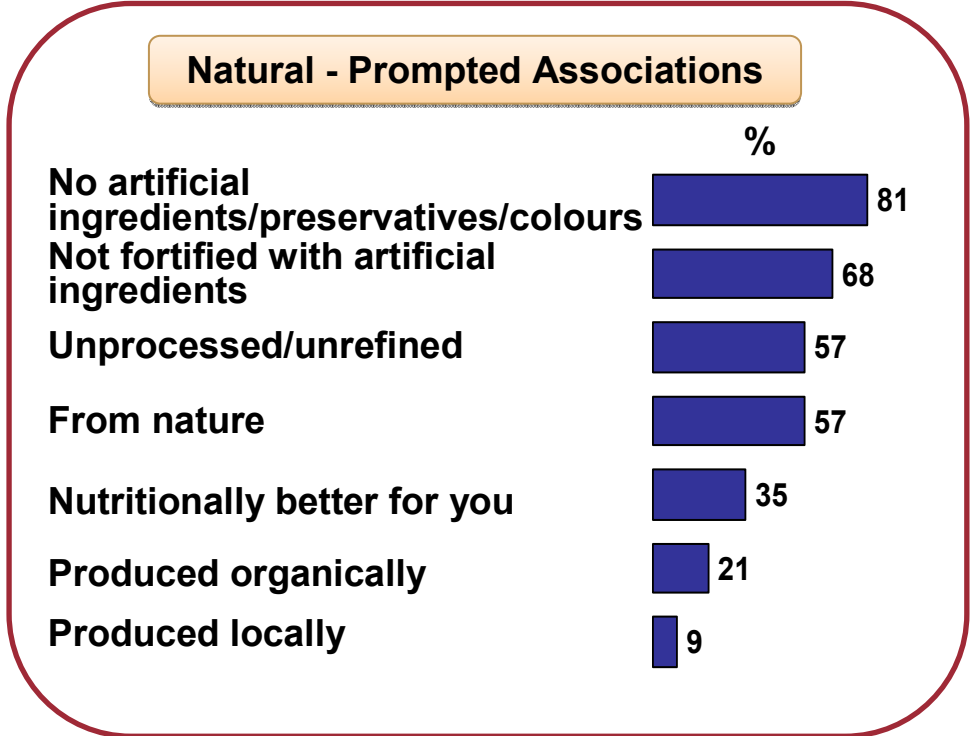
90% claim natural very/fairly Important

(Base: All adults 18+ - Spain)

Impact of 'Natural' on Labels when Shopping



Natural - Prompted Associations



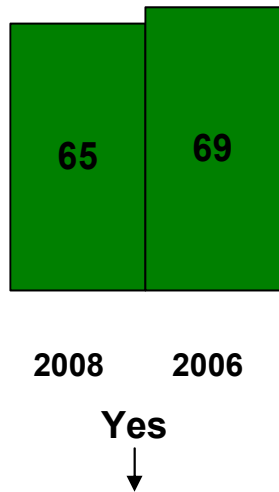
**SECTION 9:
Attitude Towards Alcohol**



Alcohol part of daily/weekly routine

(Base: All Adults 18+ - Spain)

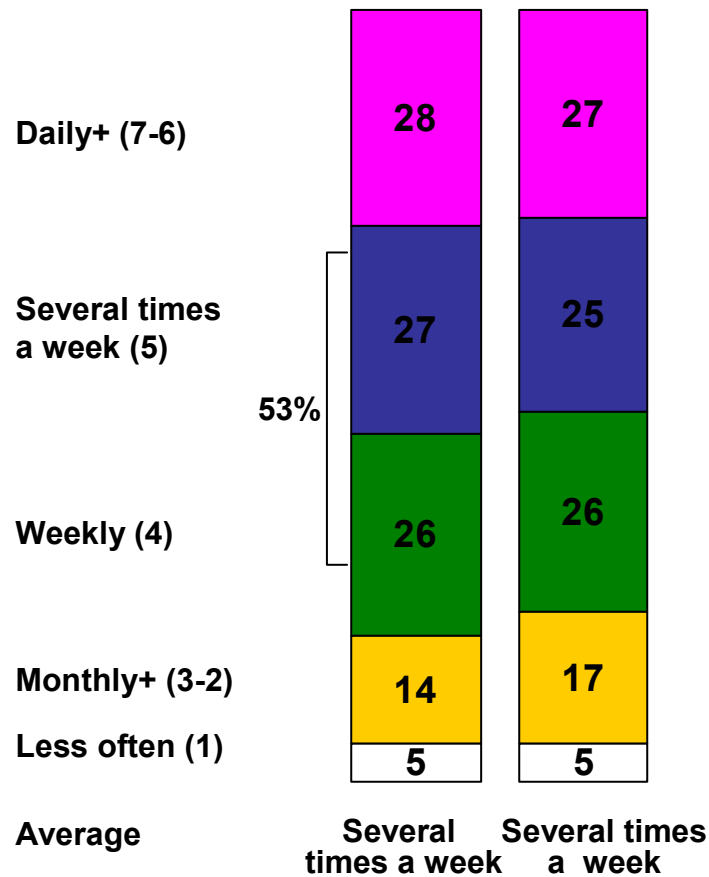
INCIDENCE



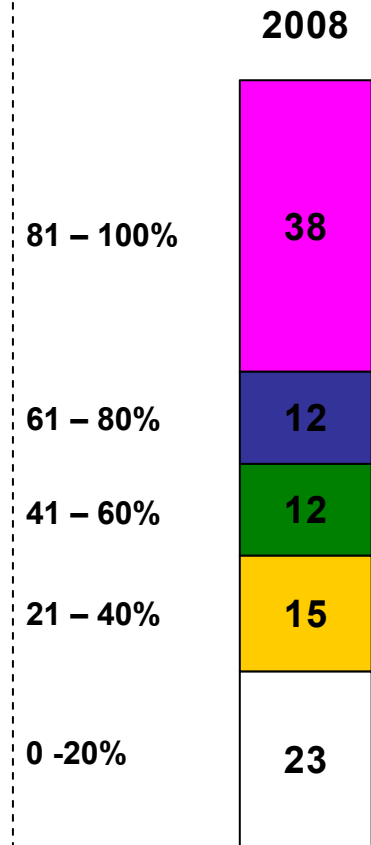
1. Singles, males and those eating out more

FREQUENCY

% Drink Alcohol → (65%) 2008 (69%) 2006



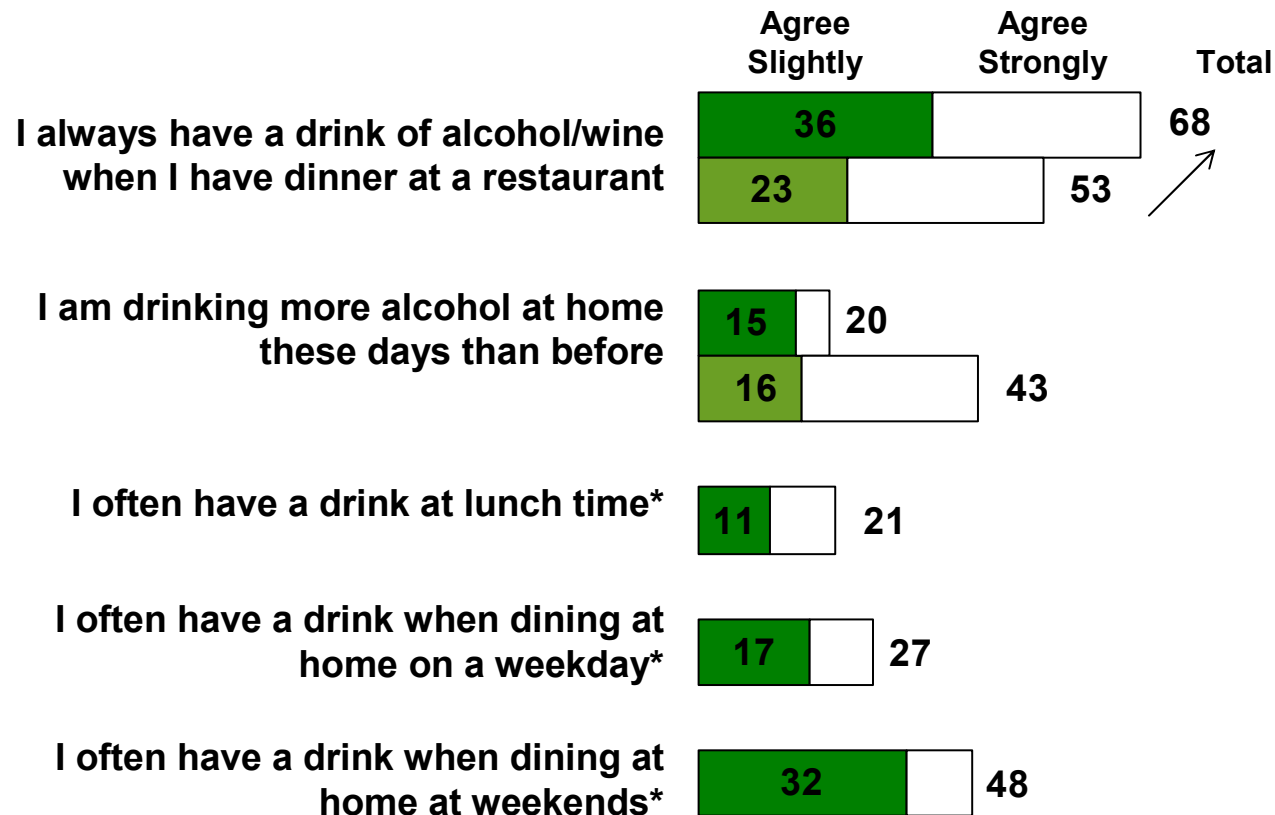
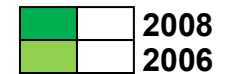
PROPORTION – Consumed with Food



Seven in ten always drink when dining out

Attitude Towards Drinking Alcohol

(Base: All who drink alcohol)



* New question added 2008

Study Summary



Key Lifestyle Trends

Healthy Eating is Key to Spanish Diet – Low fat, balance, fresh, natural



Economic Climate Impacting Shopping – more price conscious and eating out less



Strength of Local Food having impact on shopping habits



Younger Consumers more open to prepared food



Key Lifestyle Trends



Healthy Eating is Key to the Spanish Lifestyle

- ◆ **Spanish consumers are very conscious of what they eat. They are very aware of the impact that good food has on both physical and mental health. They are also very weight conscious and favour low fat options. Fruit and vegetables form an important part of their diet along with meat and dairy products. Fresh and natural foods are very important to the Spanish shopper – as a result local food is very popular. Quality and healthiness, along with freshness and taste are the key qualities Spanish look for when buying/preparing food. The Spanish passion for food translates into a love of cooking. Cooking from scratch is dominant in Spain with over six in ten cooking from scratch on a daily basis. Marketing of fresh ‘raw’ products offers most potential in the Spanish market.**



Key Lifestyle Trends



Younger Spanish – more open to ready meals?

- ◆ **Younger Spanish (18-44 yrs) are more time poor and favour convenience ready meals, ready to eat foods, prepared sandwiches/rolls and hot food from deli counters more than older consumers. They also have stronger interest in foods that are quick to cook and report that they are too busy to cook as often as they would like. However, while they are more likely to have convenience meals in their home and see them as filling, they do not rate the ingredients highly. Overall Spanish consumers are not as positive about fresh ready meals versus other European consumers especially on taste and healthy ingredients. This may be due to the Spanish palate being more used to fresh ingredients which are cooked from scratch or it could be that the fresh ready meals on offer in Spain fall below that of other European countries in terms of quality and taste. There is however, potential for a range of high quality ready meals which use fresh ingredients aimed at the younger Spanish consumer.**





Economic Climate Impacting Shopping and Eating Out in Spain

- ◆ **Spanish shoppers have become more price aware than in 2006, likely as a result of the economic downturn. They are more likely to put price first than in 2006 and are to comparison shop for fresh food. This increased interest in price will be interesting to monitor in the future – will Spanish consumers continue to shop locally for the freshest, best quality raw ingredients or will they trade off quality for price and use multiples more to keep within budget?**
- ◆ **The Spanish are eating out and purchasing takeaway meals less than in 2006. Midweek dining out has declined and is now seen as more of a treat than in the past. This decline in eating out may also be related to the aim of a more healthy lifestyle. Just under one-third of Spanish consumers feel they have become more healthy in their eating patterns in the past year.**



Key Lifestyle Trends



Strength of Local Food Impacting Shopping

- ◆ **Purchasing local food is very important to Spanish consumers. They see 'local' as food that is produced within the county or province in which they live. Frequency of purchasing local food is high, with one fifth buying local food on a daily basis. Older Spaniards (45+yrs) are more interested in local food than younger.**
- ◆ **Spanish shoppers are very interested in knowing where their food comes from and check both for quality labels and for country of origin. Their interest in local food has strengthened since 2006 with more purchasing meat that is fully traceable. Local food is more strongly associated with high quality, fresh, and safe produce.**



Look for when shopping....

Fresh & Natural Ingredients

- ◆ Spanish have a taste for fresh foods and they also love cooking. Offering a range of fresh produce, possibly from the dairy and meat ranges, which have some quality guarantee may work well. Low fat versions will also appeal to the Spanish.

Clarity in Labelling

- ◆ Nutrition labelling on products is an area that could be improved. A high proportion of Spaniards look at nutritional labels but there is also a high degree of confusion about the nutritional claims on packaging. This confusion is strongest among older consumers.

Convenient Meal Options

- ◆ While cooking meals from scratch is a big part of the Spanish lifestyle there is also an increasing need for more time saving meal options, especially among younger Spanish (18-44 yrs). Whether it is meal components or ready made meals the emphasis should be on foods that are use fresh and natural ingredients.



Opportunities/challenges for manufacturers

Fresh & Natural Ready Meals

◆ Younger Spanish consumers are looking for meal options that help save time. Current fresh and frozen ready meals do not have a strong following in Spain – they are seen as adequate for emergencies but with improvement in taste and healthiness of ingredients could offer more potential.

Local Food Barrier to Imported Food?

◆ The Spanish interest in local food could act as a barrier to imported foods. The Spanish place a high regard on the freshness and quality of local food. One way of overcoming this may be to partner meal solutions with a local food eg: Irish meat combined with regional Spanish vegetables in a recipe. Or using Irish produce in a typically Spanish way eg: a selection of Irish cheese as tapas. Using local shops for distribution rather than multiples may also help convey a 'fresh' image. Consumers in Madrid appear to put less emphasis on the importance of local food and may be a good area to initially launch products.



Opportunities/challenges for manufacturers

Low Fat Highly Motivating to Spanish

- ◆ Spanish consumers love low fat foods. High quality low fat options will do particularly well. Emphasising the quality of ingredients and the source of the product, in addition to conveying the freshness of the product will make it more attractive to the Spanish market.




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.

