

PERIscope2013



French

Consumers & Their Food - Full Report



Introduction

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- PERIscope is Bord Bia's comprehensive review of food attitudes, shopping and cooking trends amongst a nationally representative sample of adults.
- In previous waves of the research, biennial studies were produced for ROI/NI/GB and for other European countries (including France, Germany, Belgium, Spain, Netherlands and Sweden). In 2010, research was also conducted in New Zealand and the US.
- In 2013, Bord Bia took the decision to combine both studies in order to obtain a more detailed perspective on how consumers view food related issues and report their behaviours across 10 countries. PERIscope 2013, therefore, provides research findings for the ROI/GB and Continental study in one year.
- Over the various studies we have held many questions constant to allow tracking over time; we also include topical issues as they arise.
 - This deck is designed to provide a thorough flavour of the PERIscope 2013 results for **France**. The charts included represent the study results. More detailed information is available in the tabular reports.

Research Method

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- Online survey conducted by Ipsos MRBI on behalf of Bord Bia.
- The research was conducted among a representative sample of adults aged 18+ in France.
- Quotas were set on sex, age, region and social class to ensure a representative sample.
- Sample size 1,000.
- Fieldwork was conducted between June and July 2013.
 - *Please note, there may be discrepancies in relation to some of the 'total' figures within this report. This is due to rounding (e.g. "slightly agree" at 45, "strongly agree" at 30, "agree" at 76).*
 - *Where new statements have been added or in instances where question wording and/or format may have changed, missing data is represented by 'n/a'.*

Contact Details

4

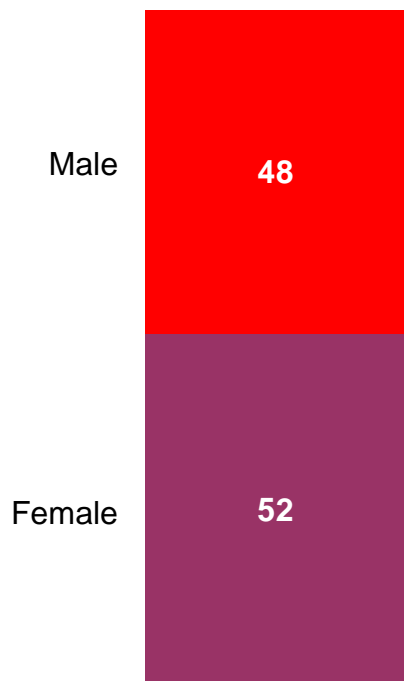
- For further information about Bord Bia's PERIscope 2013 study, please email info@bordbia.ie or Tel: 01 6685155.
- All content provided in this pack is also available on the Bord Bia website, www.bordbia.ie

Profile of Sample – 2013 (I)

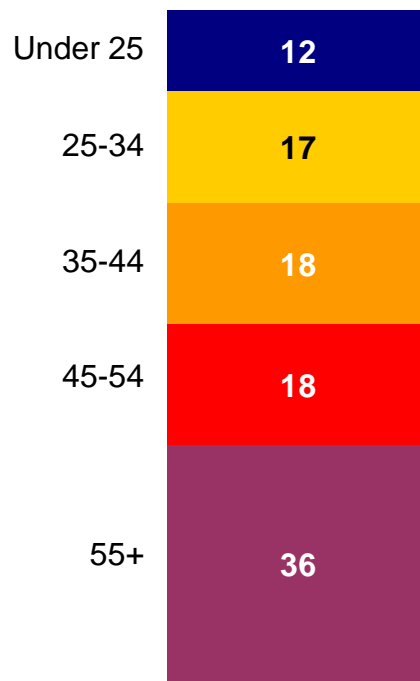
5

%

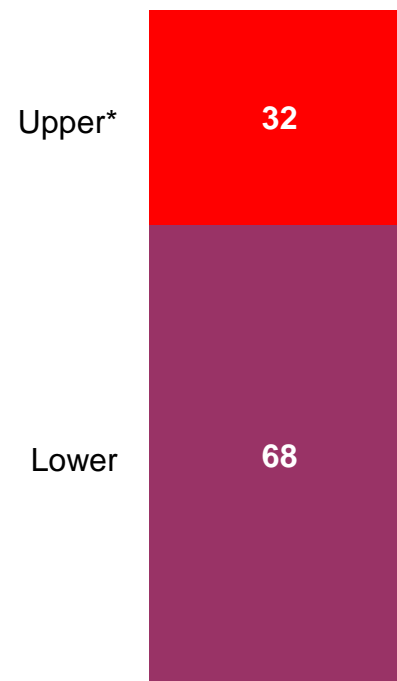
SEX FRANCE 2013



AGE FRANCE 2013



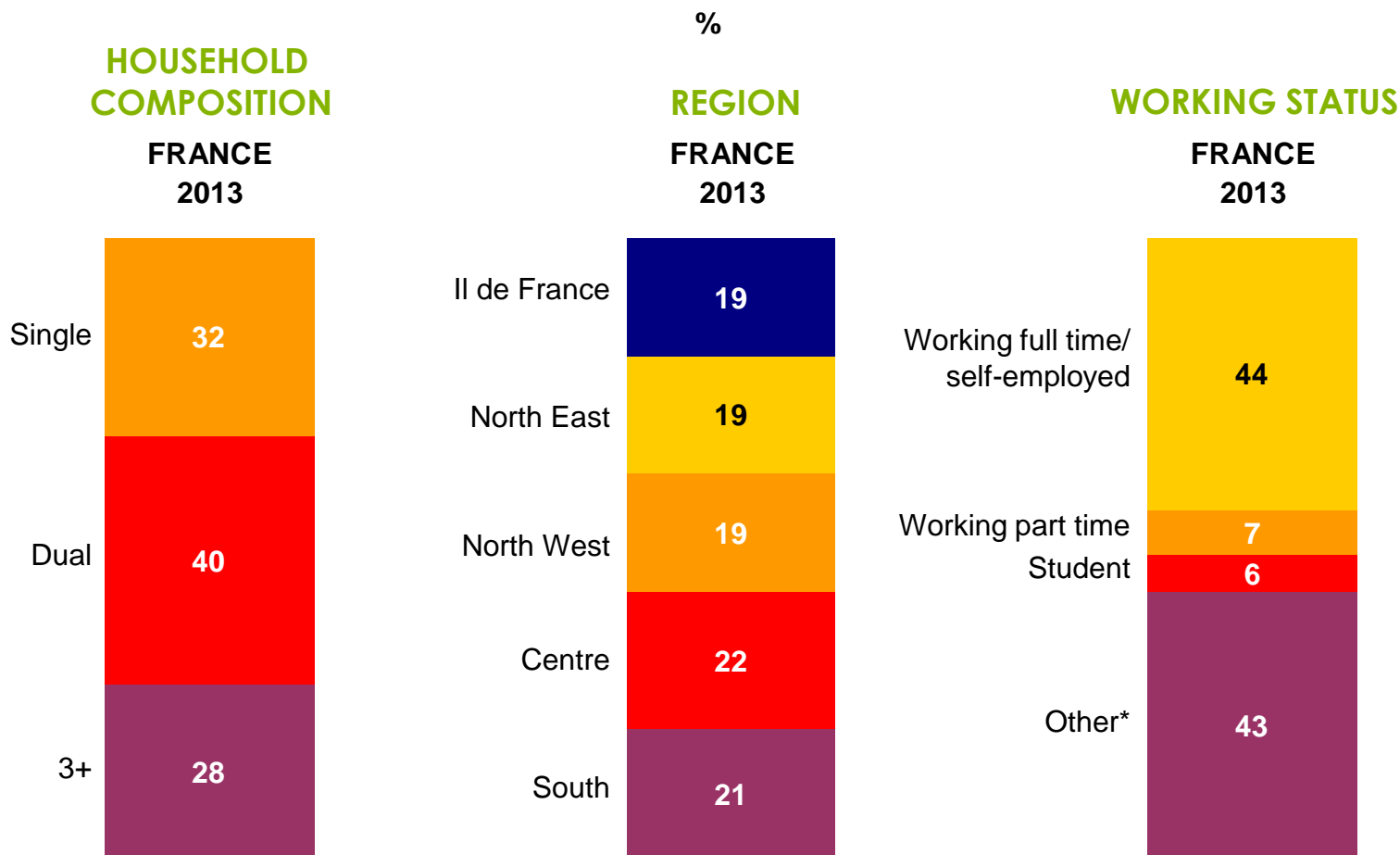
SOCIAL CLASS FRANCE 2013



*Upper is classified as all earning above €30,001

Profile of Sample – 2013 (II)

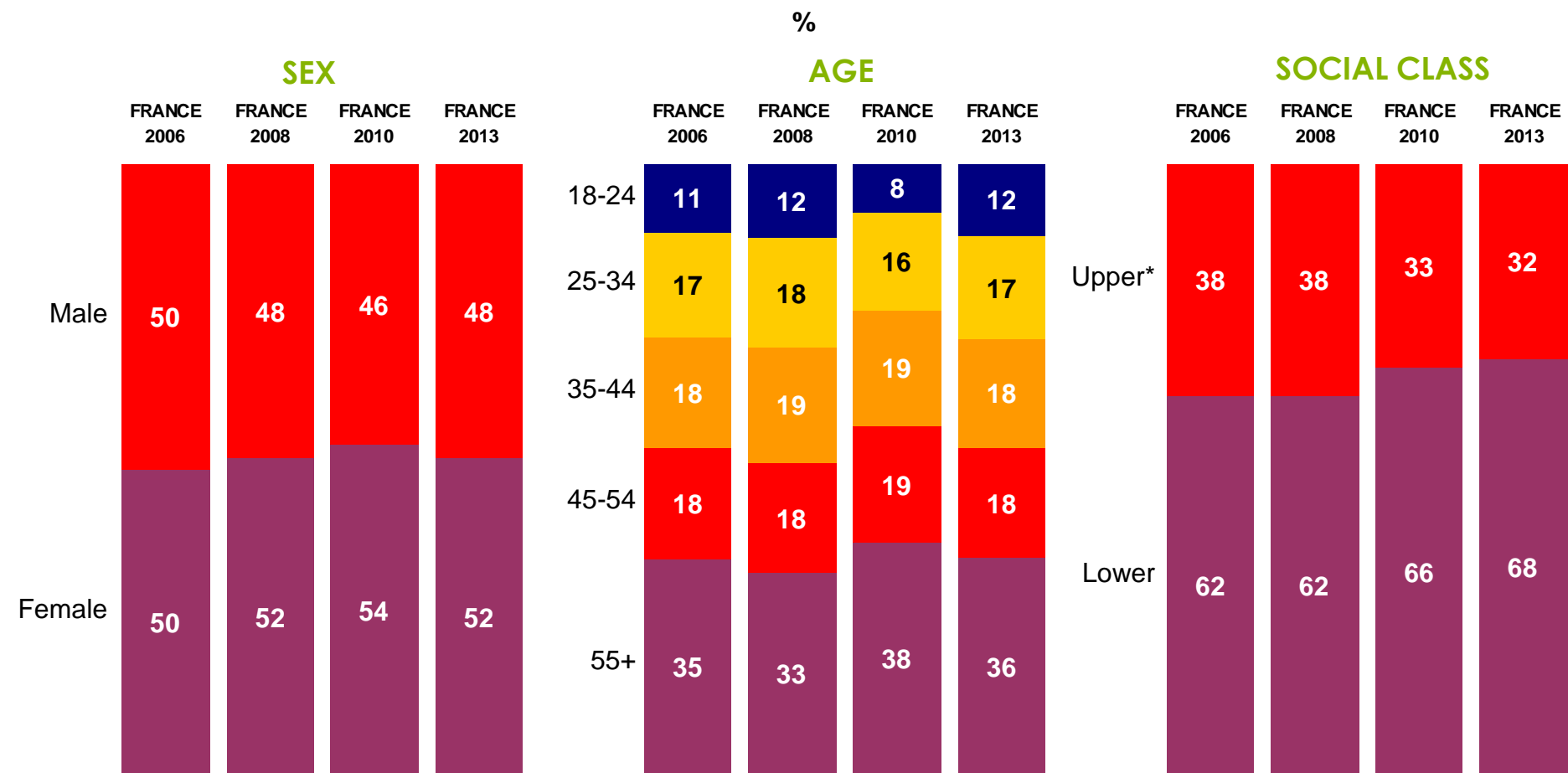
6



*Other includes housewife, retired, unemployed

Profile of Sample (I)

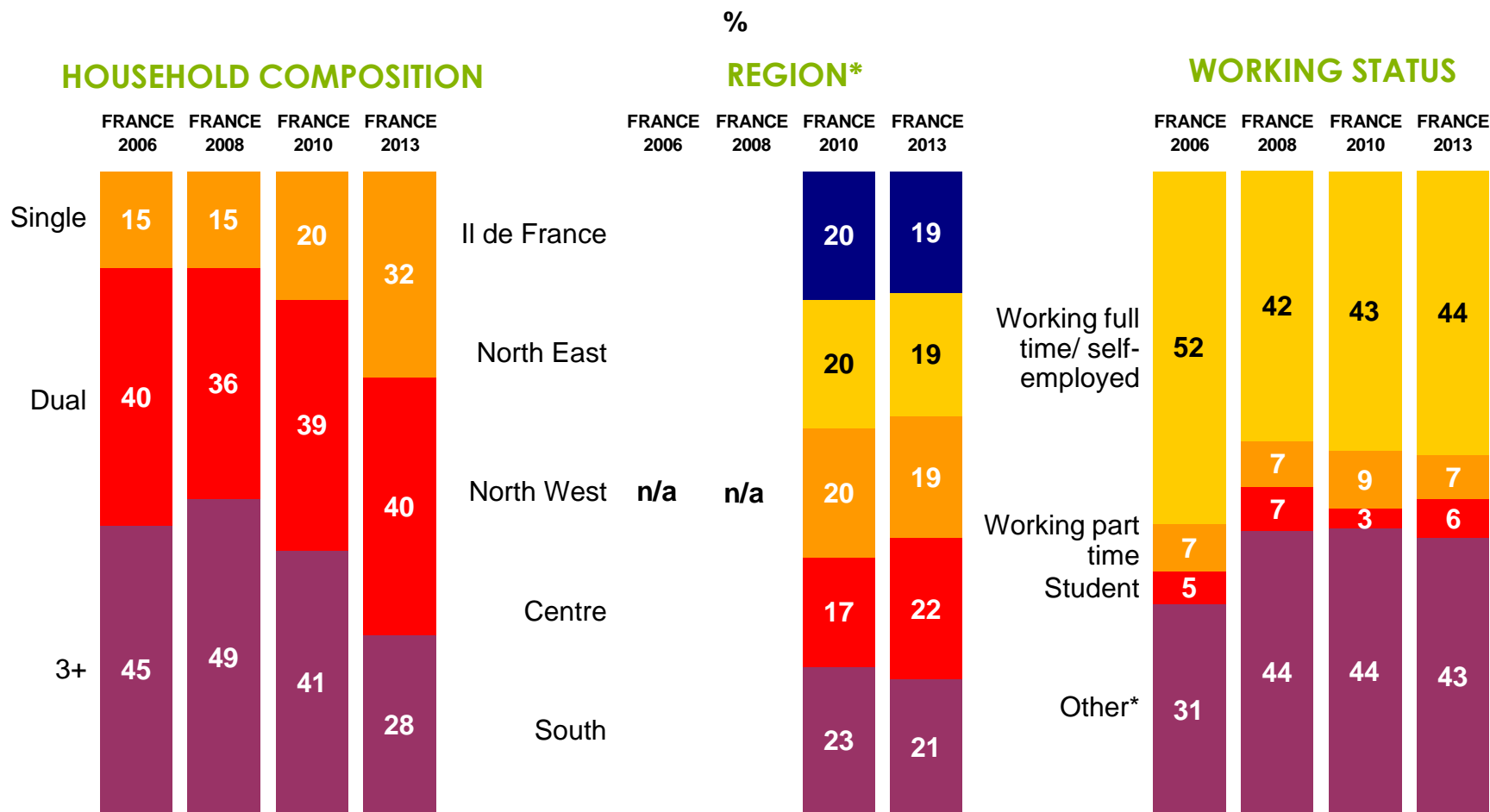
7



*Upper is classified as all earning above €30,001 or AB social grading

Profile of Sample (II)

8



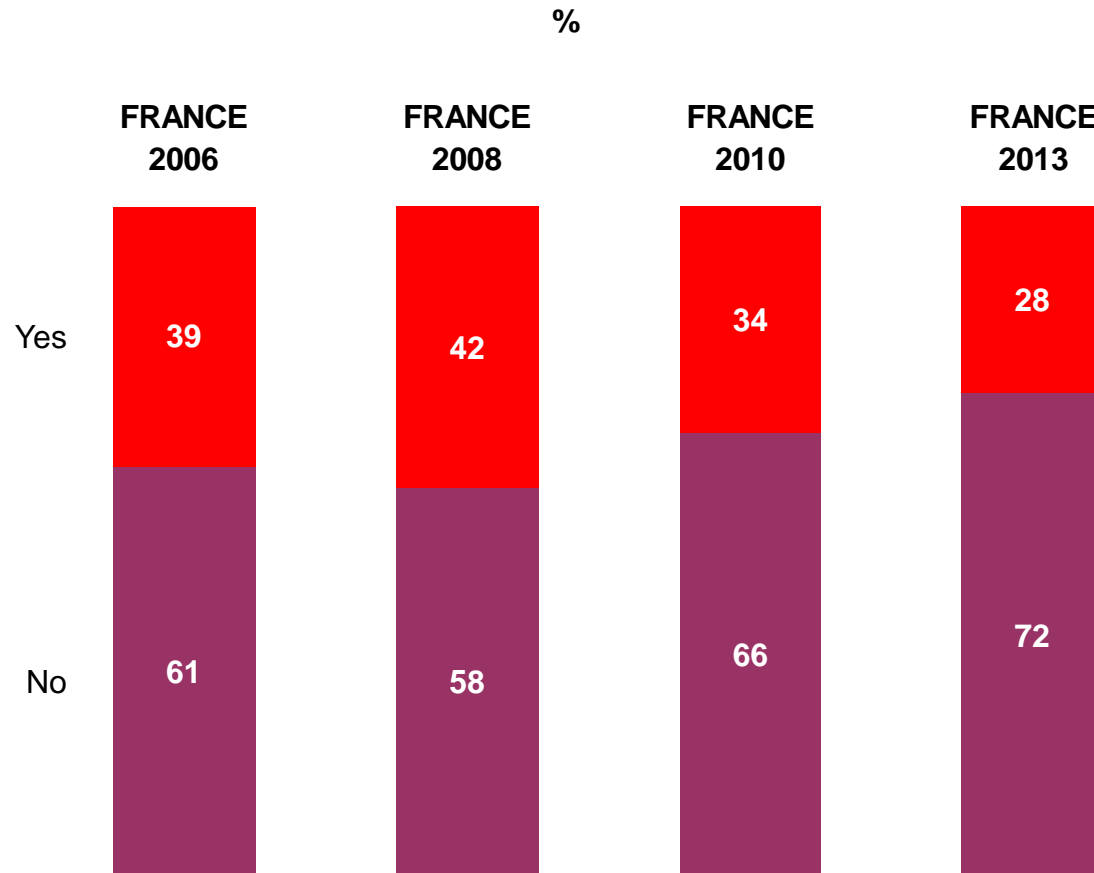
*Change in Region in 2010

**Geographic breakdown of regions different in '06 & '08

*Other includes housewife, retired, unemployed

Incidence of Dependent Children Living in Household

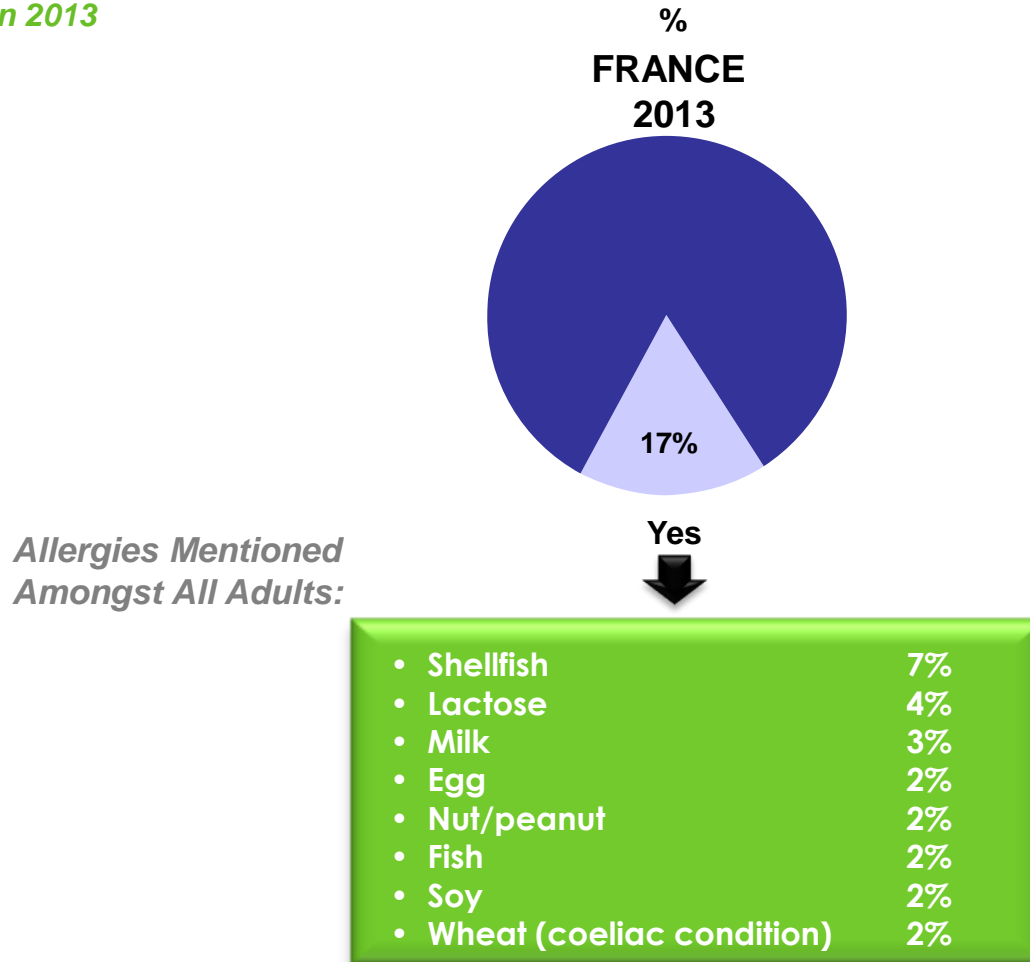
9



Incidence Of Food Allergies In The Household

10

New question in 2013



Q.30a Do you or anybody in your household have any of the following food allergies?

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French

Attitudes Towards Food

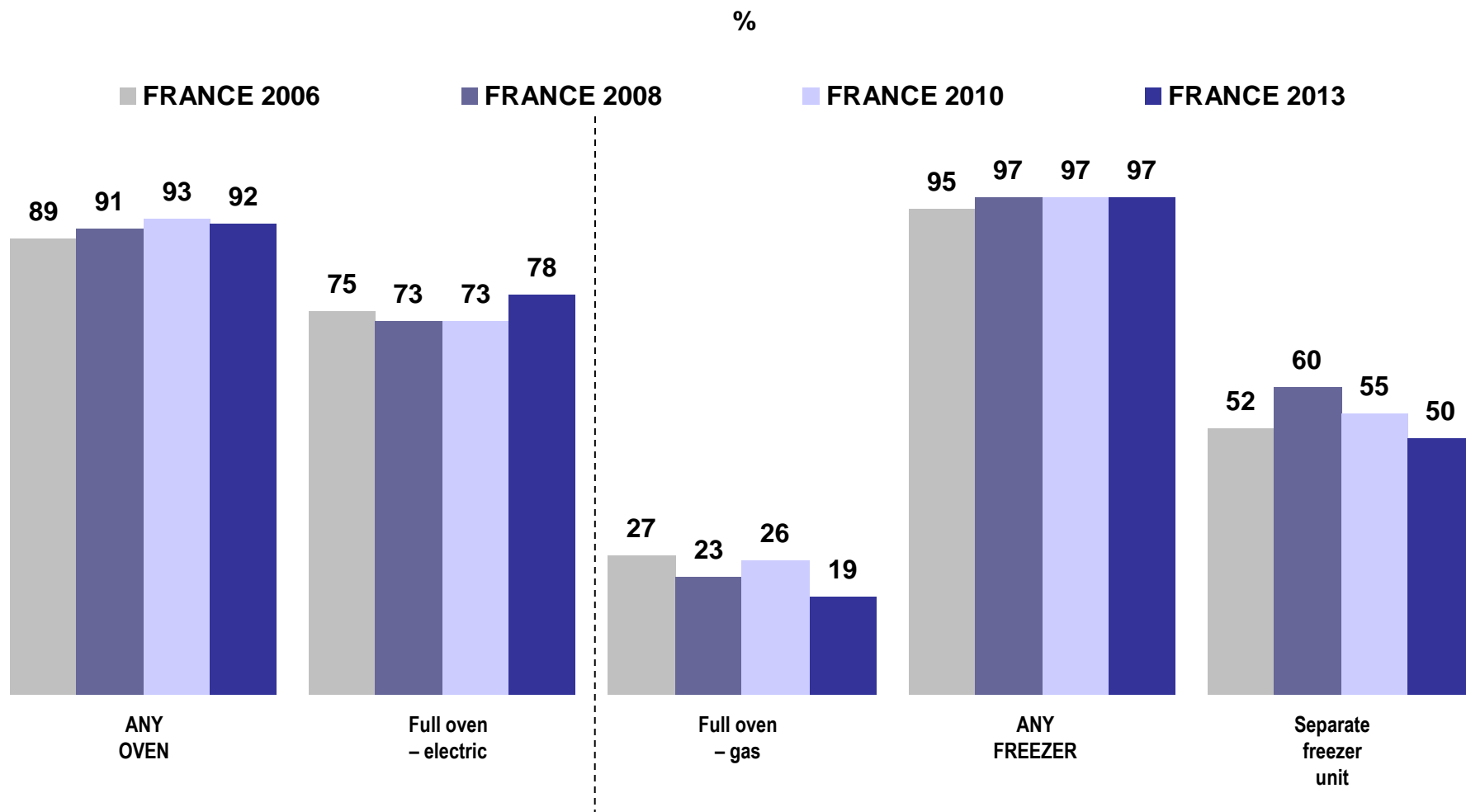
Attitudes Towards Food: Summary

12

- The adult population in France display an enthusiasm for eating lots of fruit and vegetables. They also consider dairy foods (milk and cheese) to be an important part of their diet.
- The French seem also to be quite health conscious in their food approaches with strong support for trying to eat foods that are low in fat. The proportion of people admitting to eating ready prepared/ convenience meals has fallen substantially since 2006.
- Those claiming to enjoy eating out and enjoy trying new foods has declined in popularity since 2008, suggesting perhaps an emphasis on tradition and home cooking instead. The fact that less people are now claiming to pick foods that are easy to prepare and quick to cook also supports this theory of more traditional approaches to food in the home.
- In relation to utility ownership, the use of deep fat fryers and steamers have seen the largest decline while smoothie makers have increased.

Utility Ownership In Home (I)

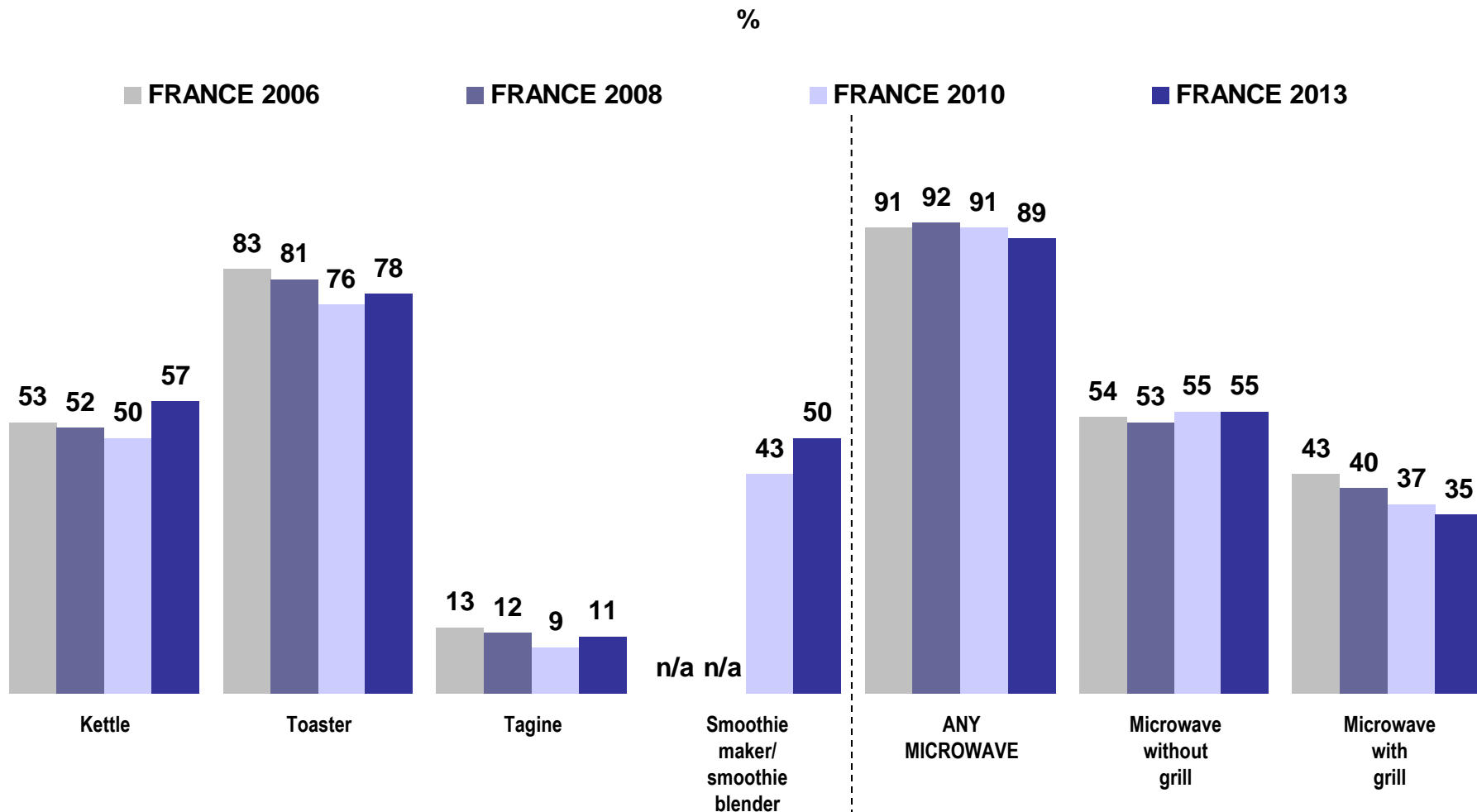
13



Q.49 Which of the following do you have in your home?

Utility Ownership In Home (II)

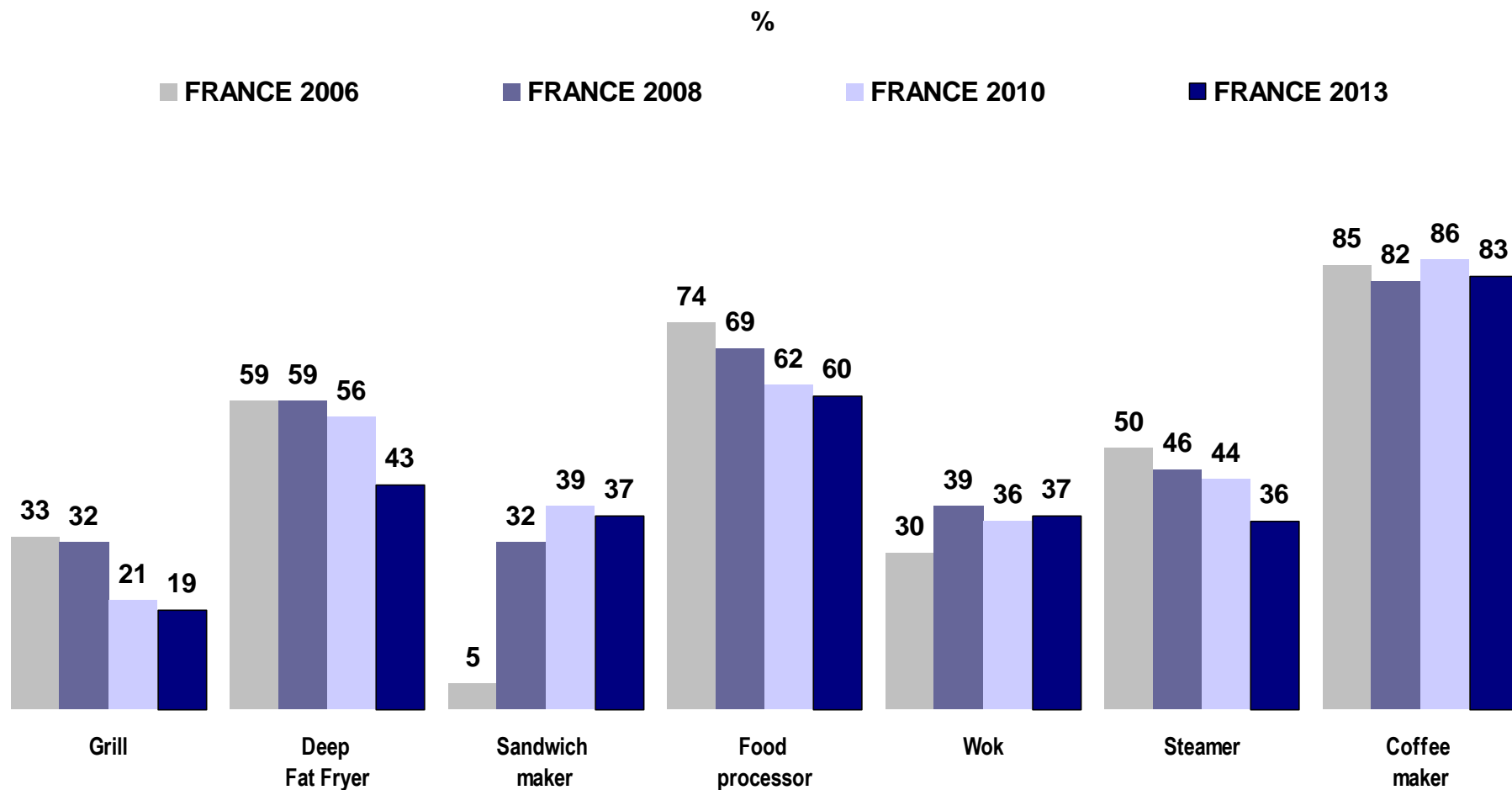
14



Q.49 Which of the following do you have in your home?

Utility Ownership In Home (III)

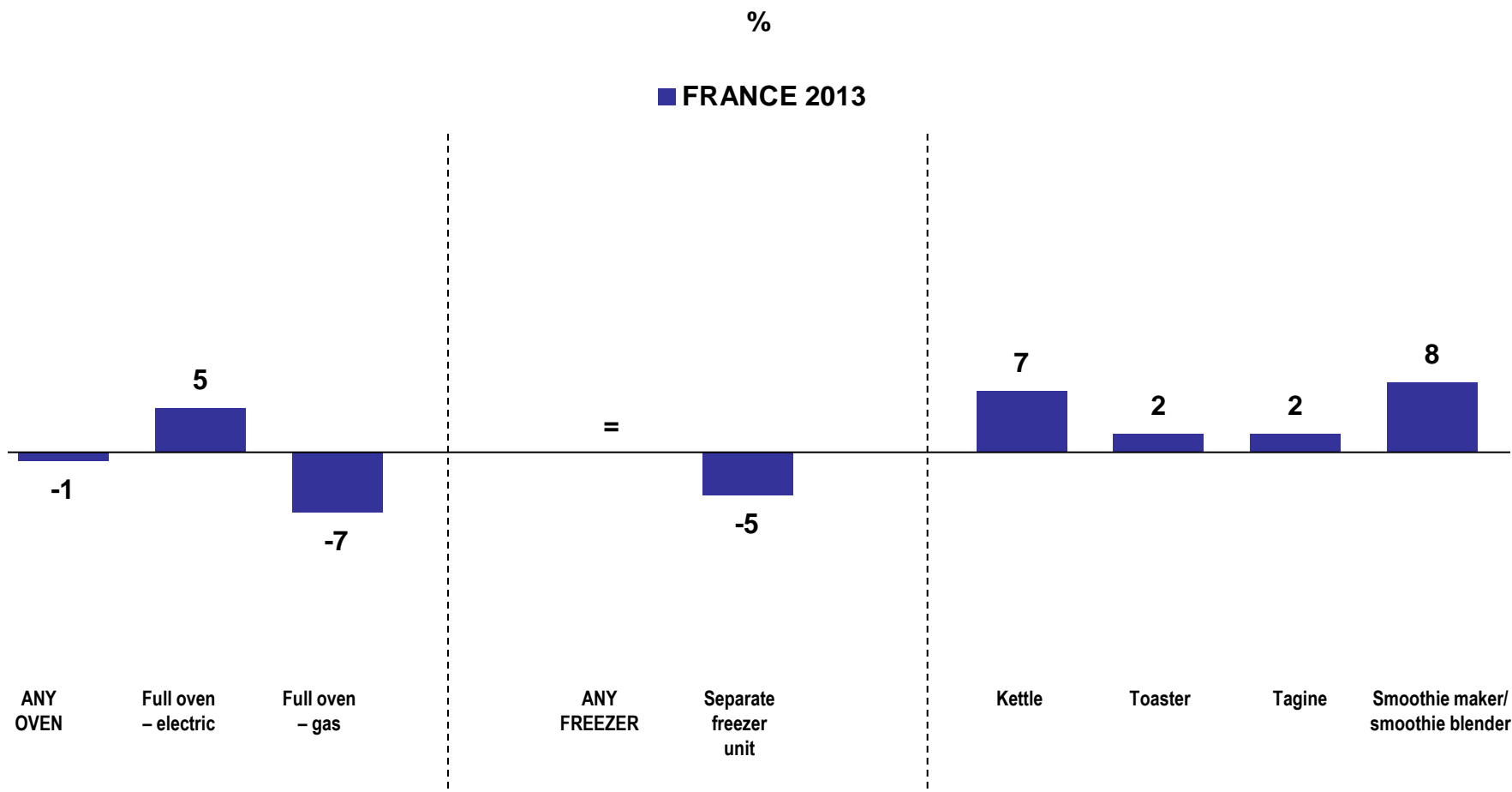
15



Q.49 Which of the following do you have in your home?

Utility Ownership In Home – 2013 VS. 2010 Differences (I)

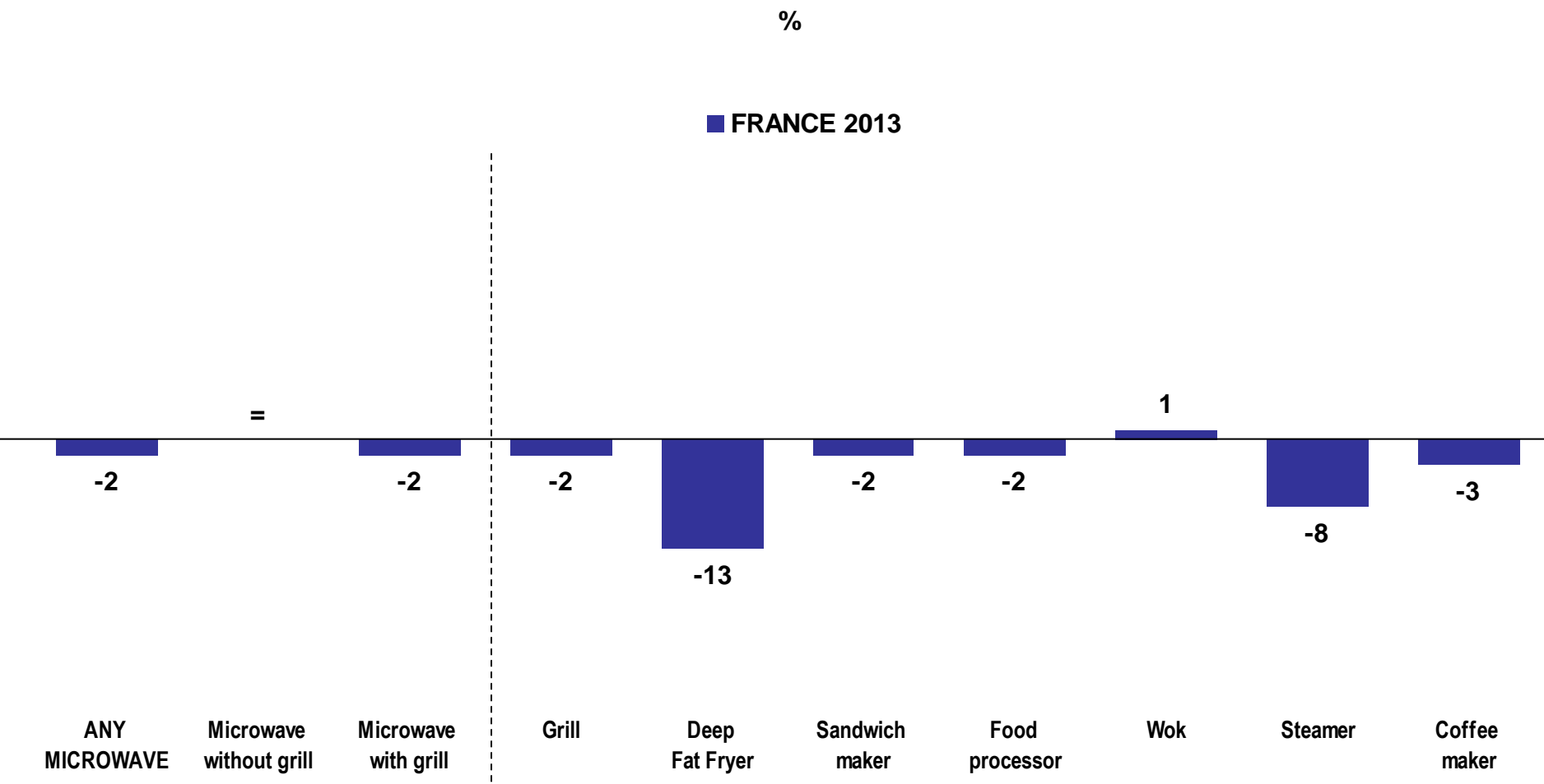
16



Q.49 Which of the following do you have in your home?

Utility Ownership In Home – 2013 VS. 2010 Differences (II)

17

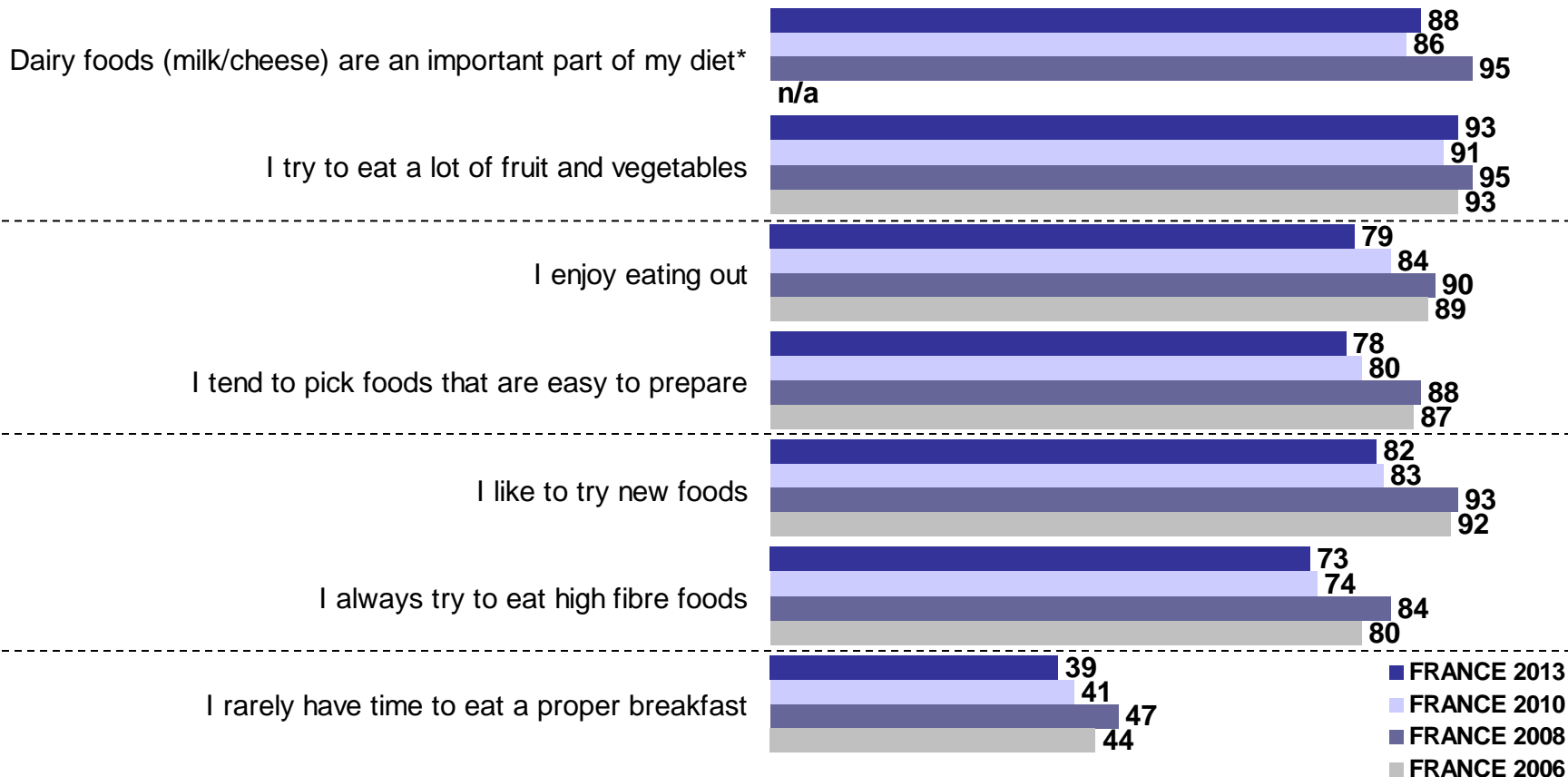


Q.49 Which of the following do you have in your home?

Attitudes to Food (I)

18

% Applies a lot/a little



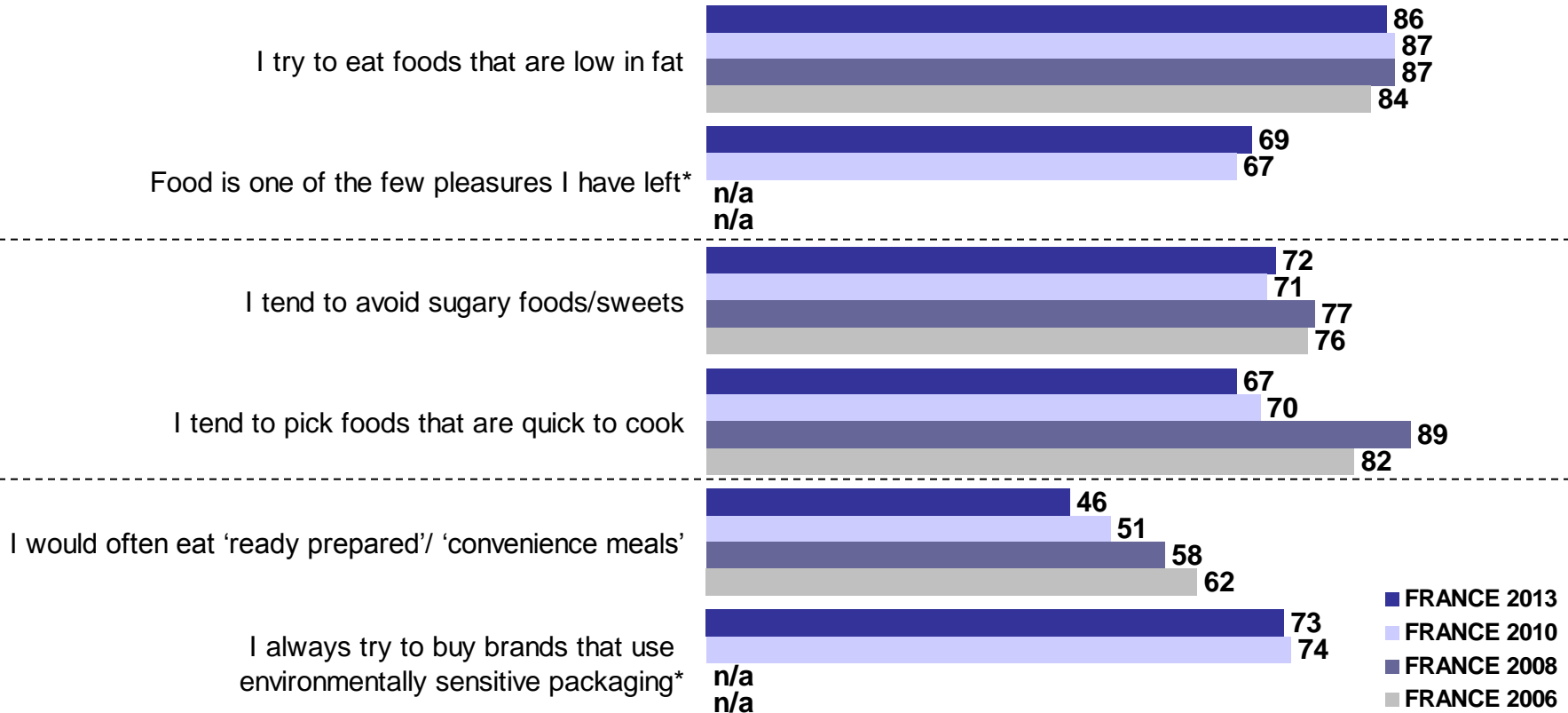
Q.1 I am now going to read out some things people have said about their attitudes to the food they eat. For each one, please tell me whether that statement applies to you personally a lot; a little or not at all?

* New statement added 2008

Attitudes to Food (II)

19

% Applies a lot/a little

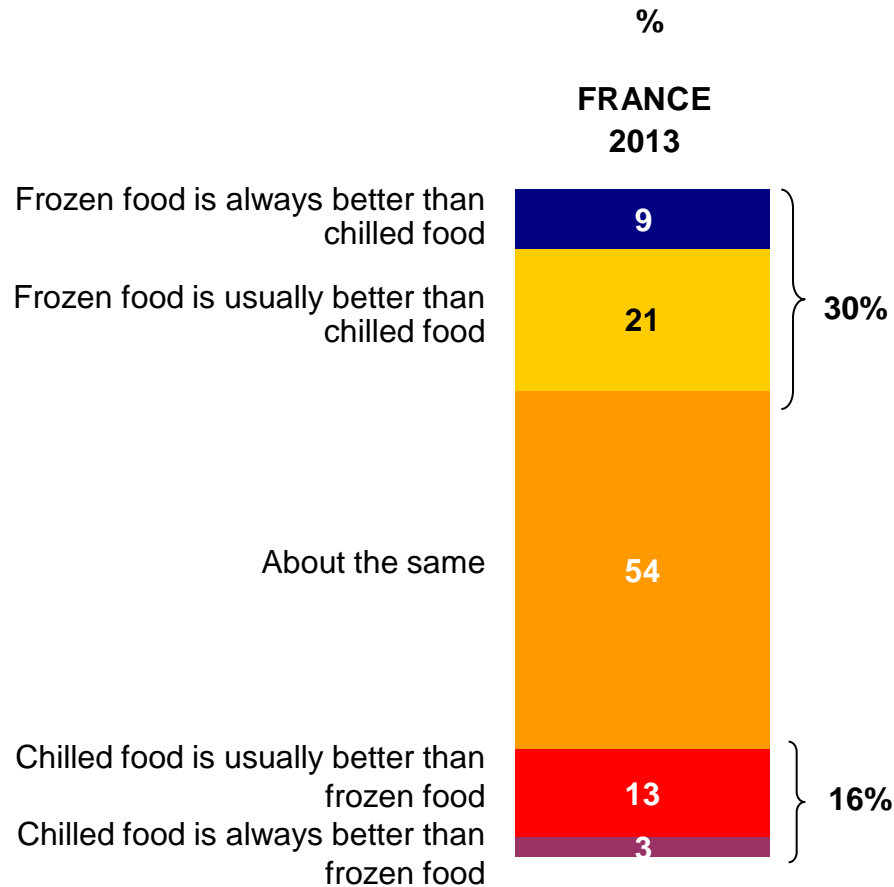


Q.1 I am now going to read out some things people have said about their attitudes to the food they eat. For each one, please tell me whether that statement applies to you personally a lot; a little or not at all?

* New statement added 2010

Attitudes to Frozen Vs. Chilled Food

20



* '06, '08 & '10 data not comparable

Q.13 Now I would like you to think about frozen and chilled food. By chilled food I mean food that you find in the chilled cabinet in a supermarket. Which of these phrases best describes your opinion of frozen food and chilled food?

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Attitudes Towards Cooking

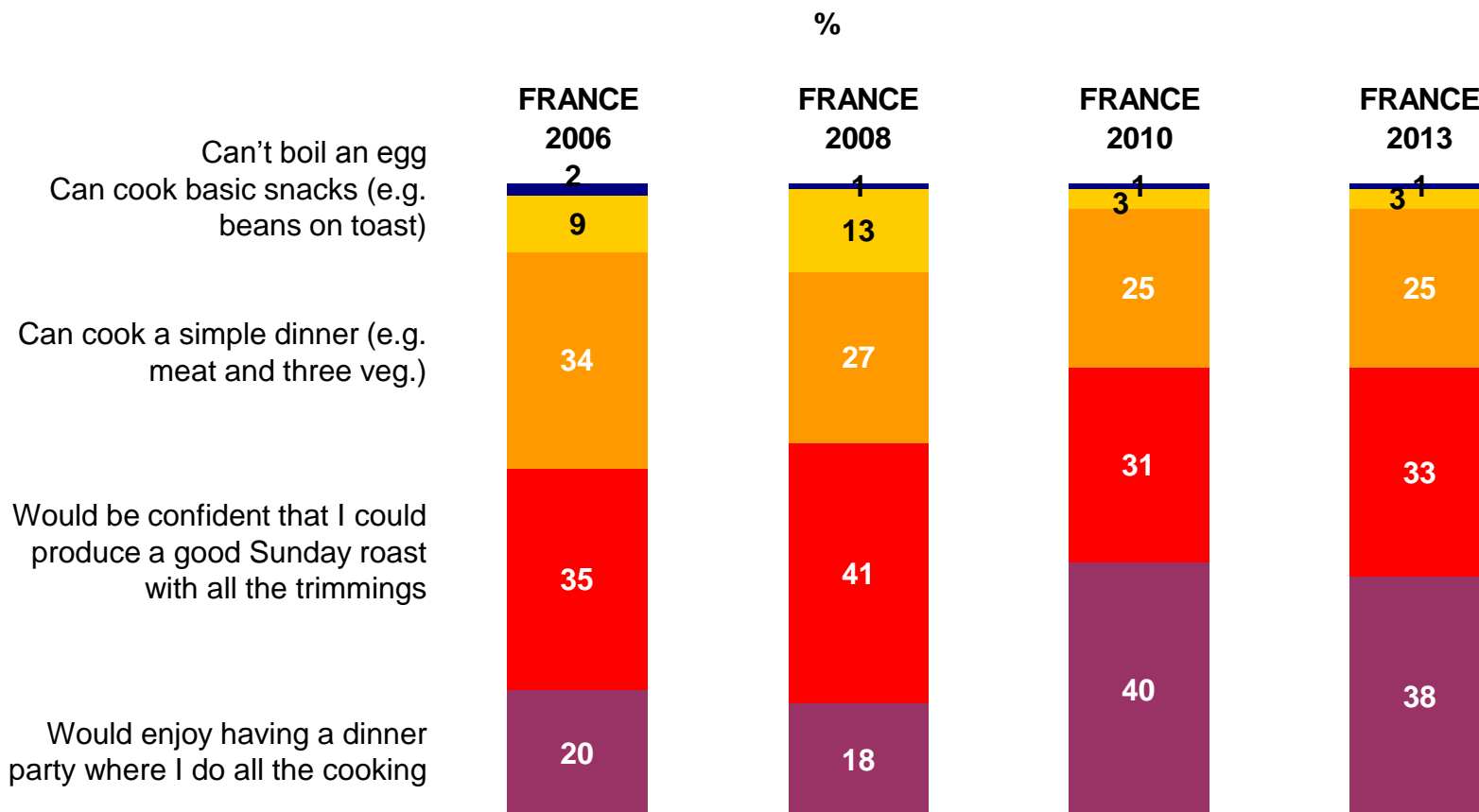
Attitudes Towards Cooking: Summary

22

- France's level of culinary expertise has been rising steadily in recent years, with the majority of the adult population claiming that they "would be confident to cook a Sunday roast with all the trimmings/ would enjoy hosting a dinner party where they do all the cooking". Dinner party enthusiasts are more likely to be females, aged 45+.
- The French attitude towards cooking has remained stable since 2008 with just over 5 in 10 believing cooking to be either good fun or a passion. However, in 2006, just over two thirds of people held these beliefs, suggesting perhaps that some of the fun in cooking has been lost in the past seven years.
- Preparing/ cooking meals from scratch is done by three quarters of the adult population in France a few times a day/ week.
- In recent years, frying and microwaving have decreased in popularity . Oven-baking/ roasting has increased in popularity to become the most popular method of food preparation.
- The use of ready prepared ingredients is done most often either a once/ a few times a month or less often than that. Once a week/ few times a week usage of ready prepared ingredients has decreased since 2006. Those using these ingredients most often (once/ few times a day) tend to be 18-34 years old.
- The French attitude towards convenience meals/ready prepared meals is quite negative. There is little agreement among this audience that these foods are filling, taste great, are good value for money or have ingredients that are good for you. Since 2006, the attitude towards convenience meals has become increasingly negative.

Level of Cooking Expertise

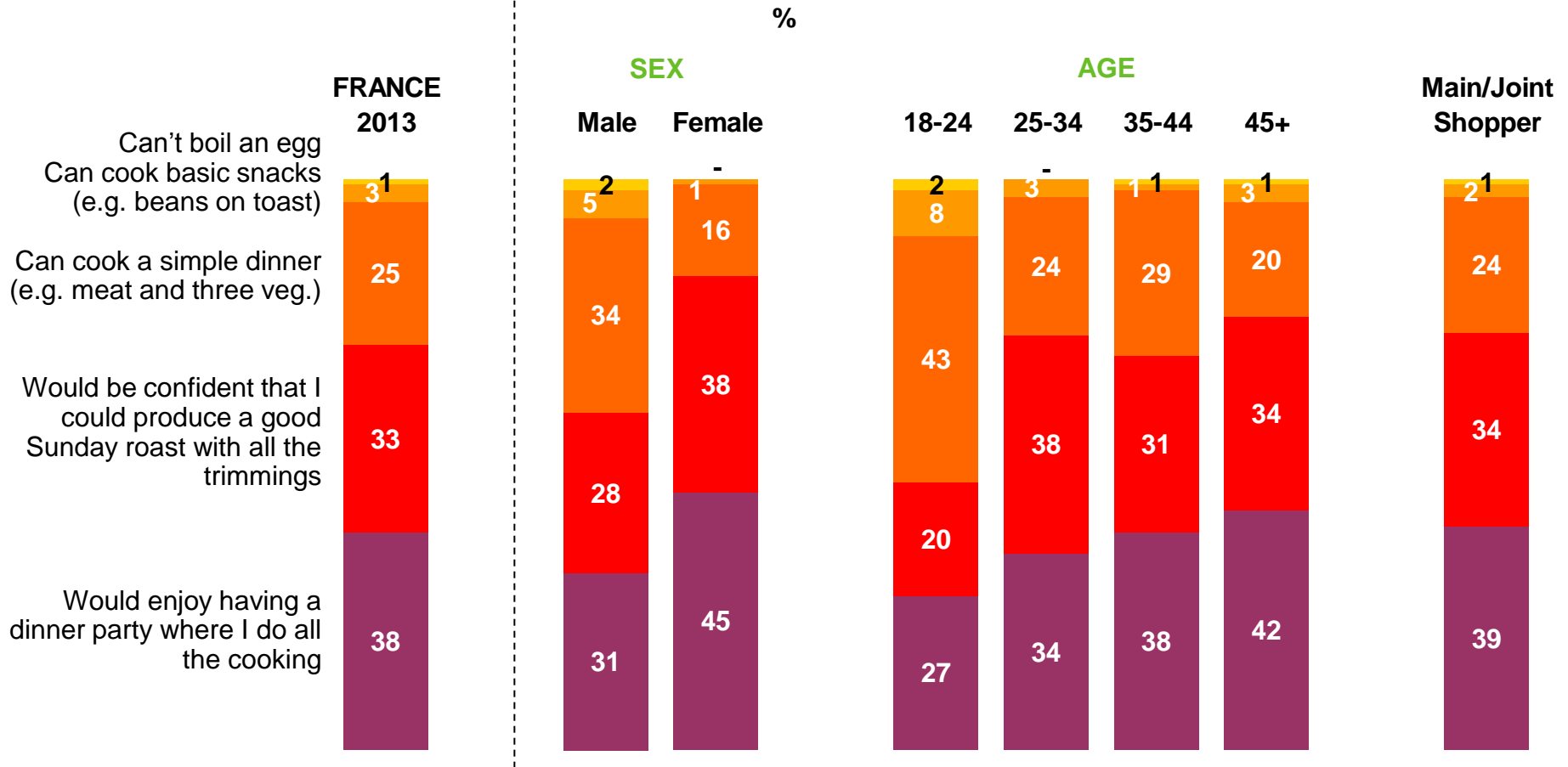
23



Q.3 Which one of these descriptions best describes your level of cooking expertise, or lack of, for that matter?

Level of Cooking Expertise – 2013

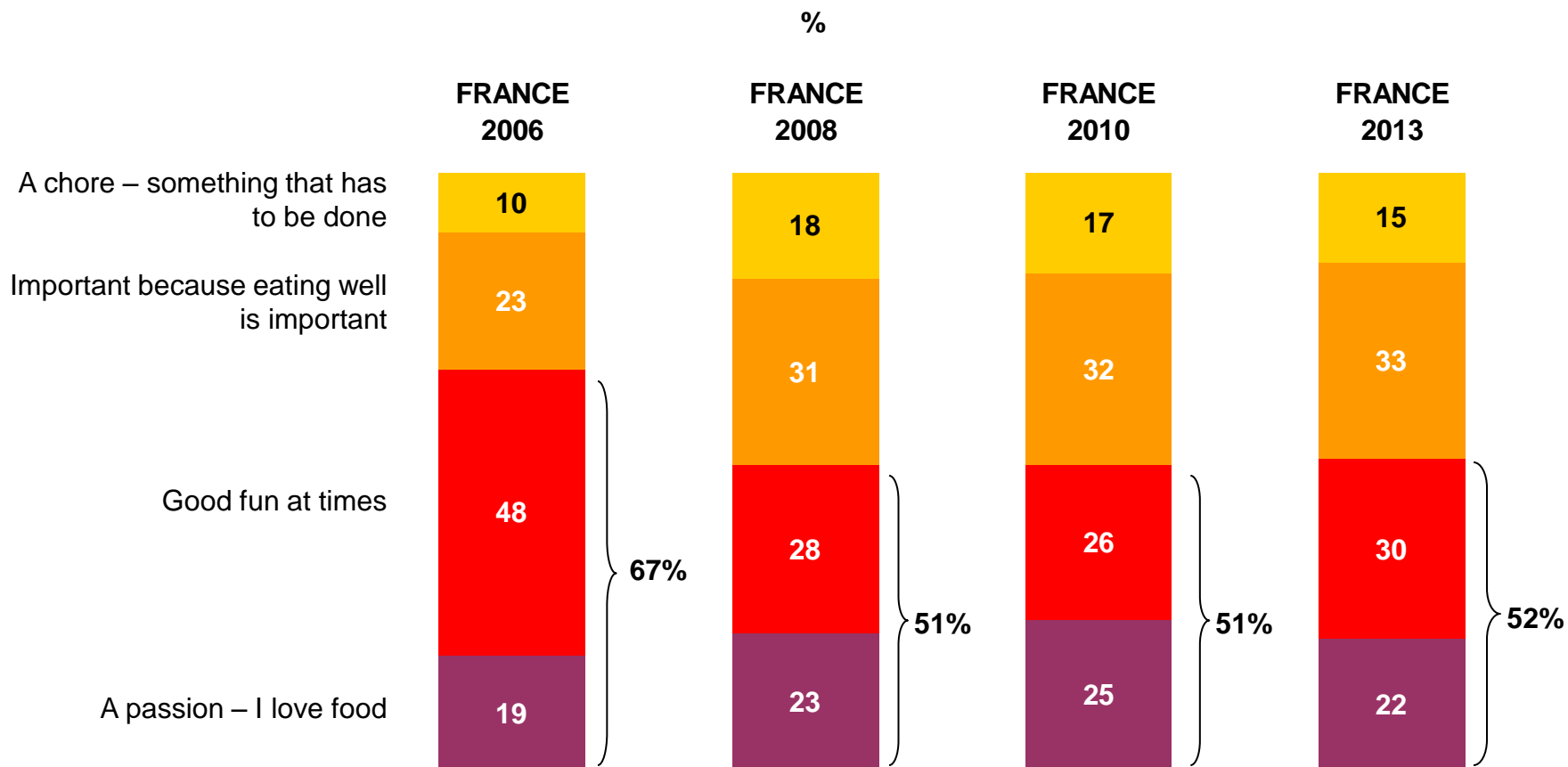
24



Q.3 Which one of these descriptions best describes your level of cooking expertise, or lack of, for that matter?

Attitude to Cooking

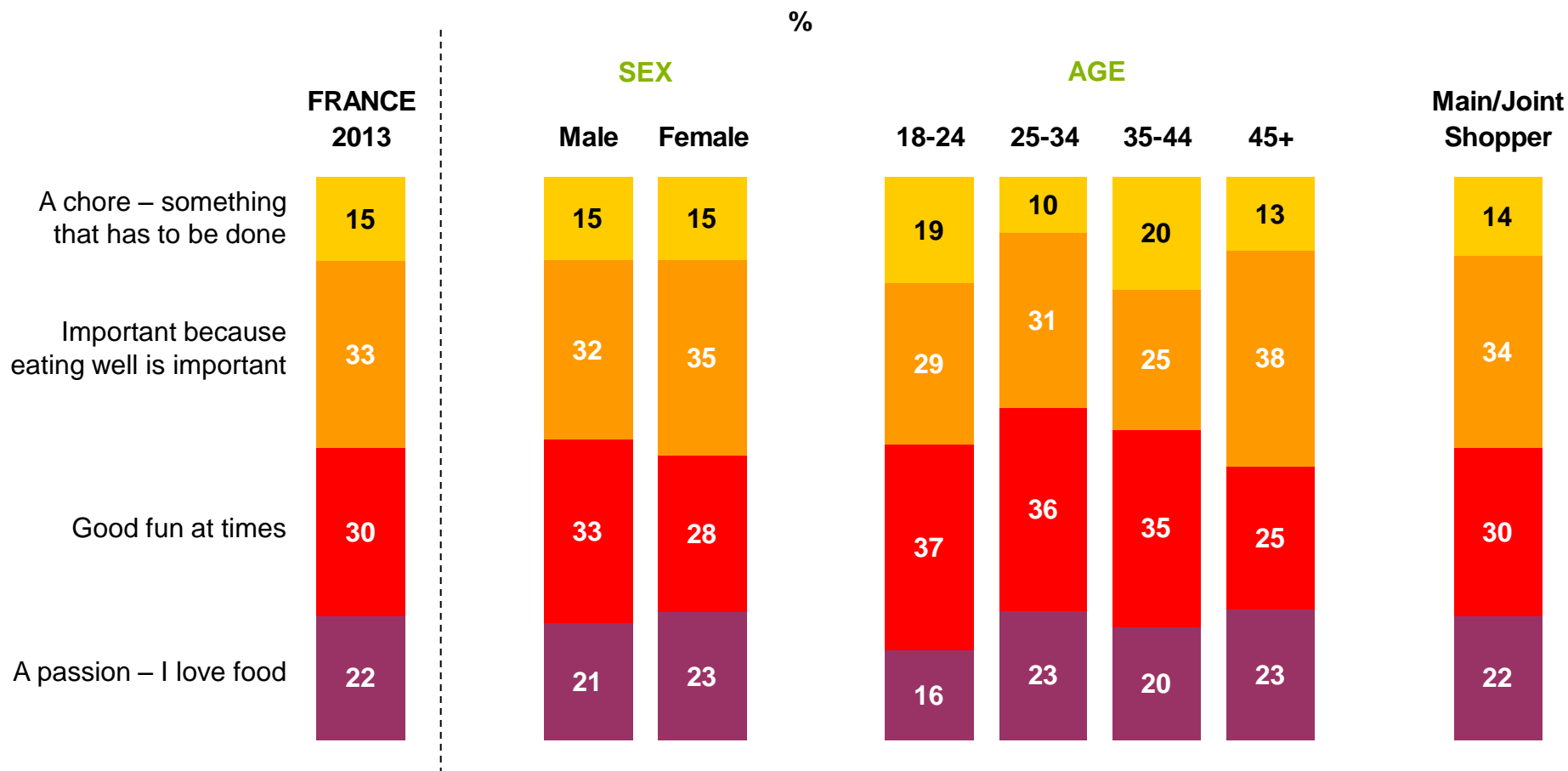
25



Q.4 And which of these phrases best describes your attitude to cooking?

Attitude to Cooking – 2013

26

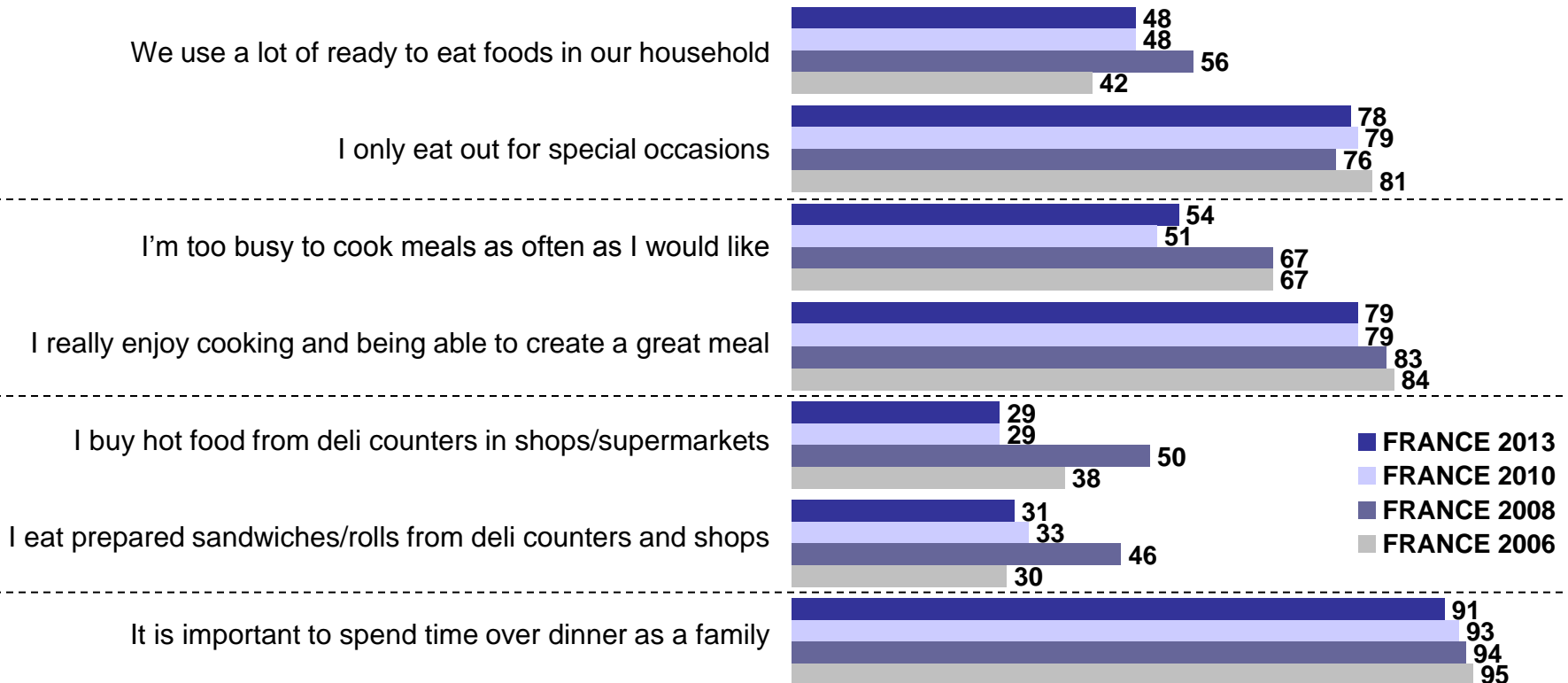


Q.4 And which of these phrases best describes your attitude to cooking?

Attitude Towards Eating & Cooking

27

% Applies a lot/a little

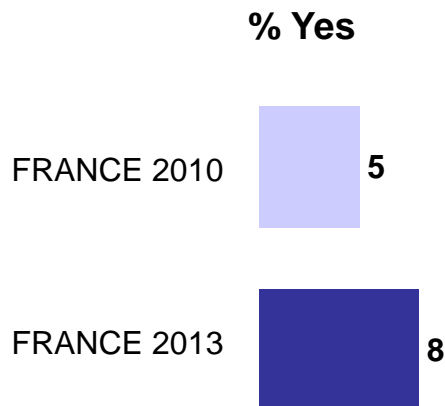


*Q.1 The following are things people have said about their attitudes to the food they eat and cooking.
For each one, please indicate whether that statement applies to you personally a lot; a little or not at all?*

Incidence Of Attending/Taking Cooking Classes In Past 3 Years

28

New question in 2010



Yes



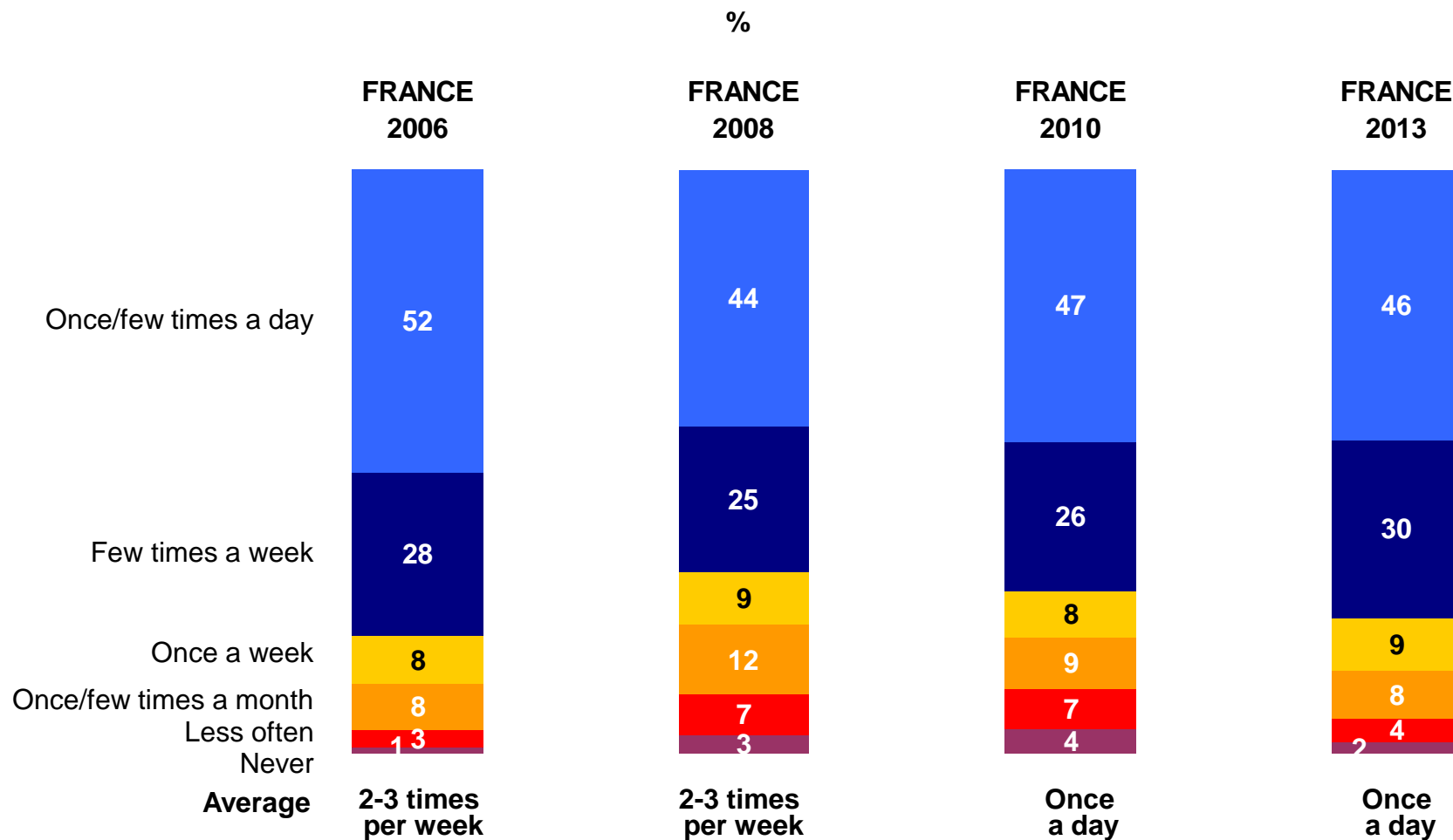
In 2013, Higher Amongst:

- 25-34 yrs
- Dependent kids
- 3+ in household
- Can cook
- Cooking is a passion
- Entertaining at home

Q.5 Have you taken any cooking lessons, attended demonstrations or taken part in any cookery courses in the past three years?

Frequency of Preparing/Cooking Meals From Scratch

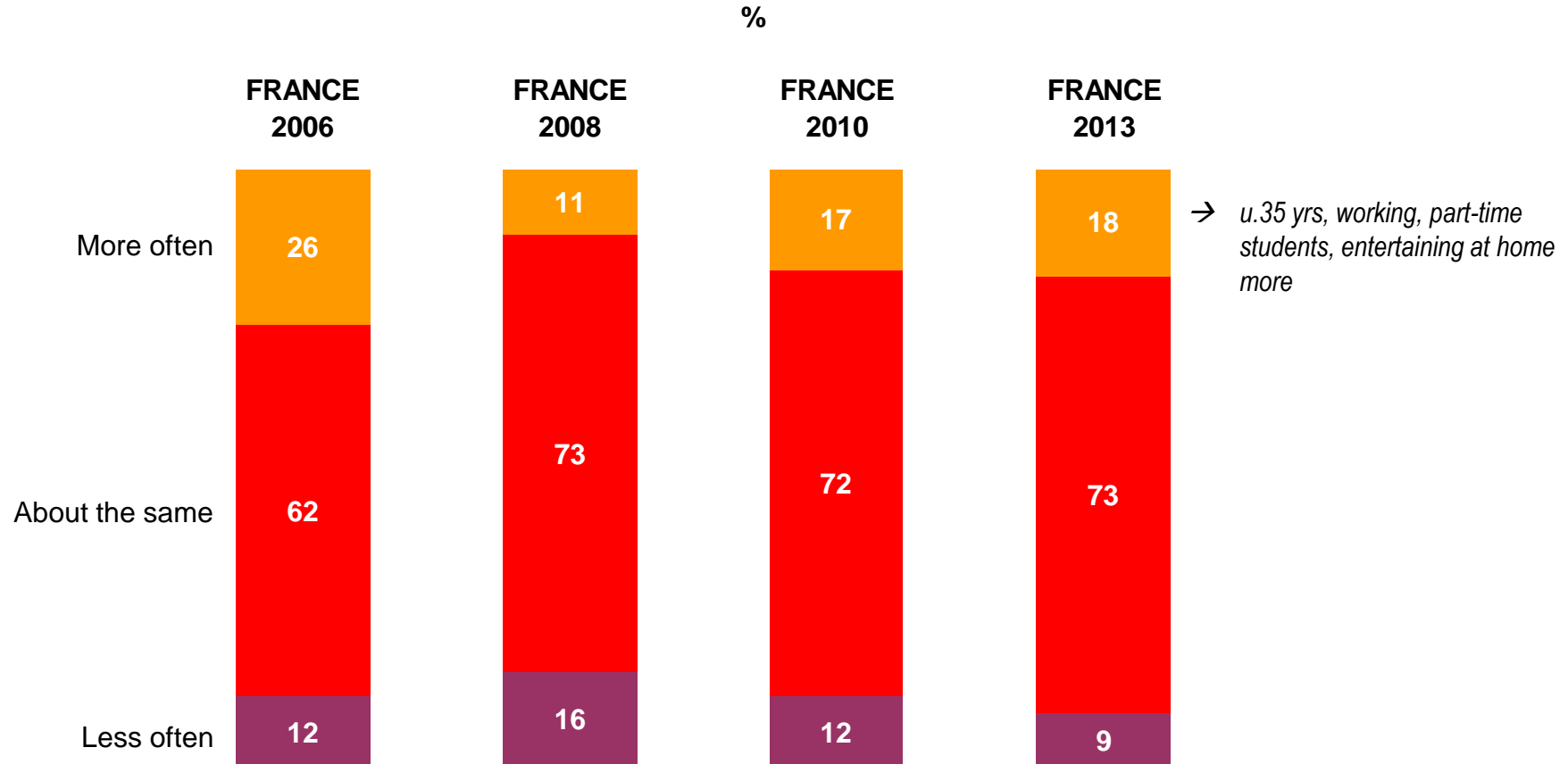
29



Q.6 About how often would you prepare or cook a meal from scratch? (i.e. using raw/fresh/primary ingredients)?

Frequency Of Cooking Meals From Scratch Compared To 12 Months Ago

30



Q.7 Thinking back to 12 months ago, would you say that you are preparing /cooking meals from scratch?
(i.e. using raw/ fresh/primary ingredients) more often, less often or about the same?

Preparation of Food x Volumetrics – Overview

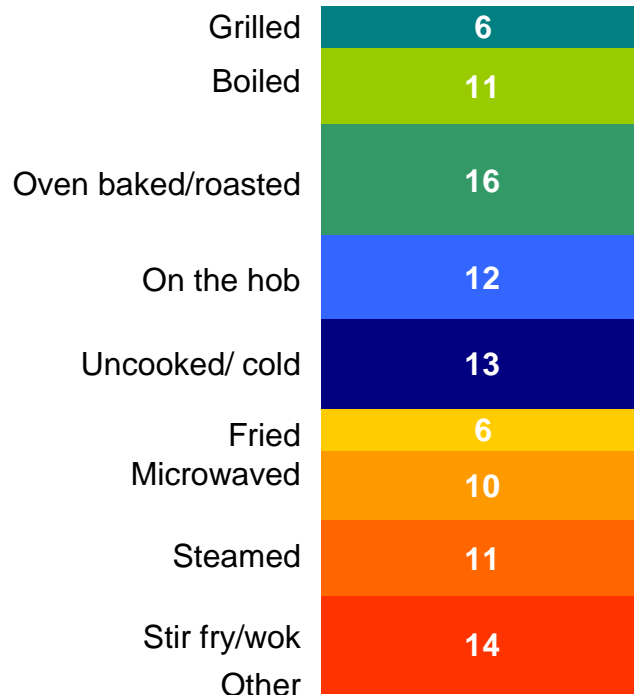
31

(% prepare own meals)

%

***Previous data not available as question format changed year on year*

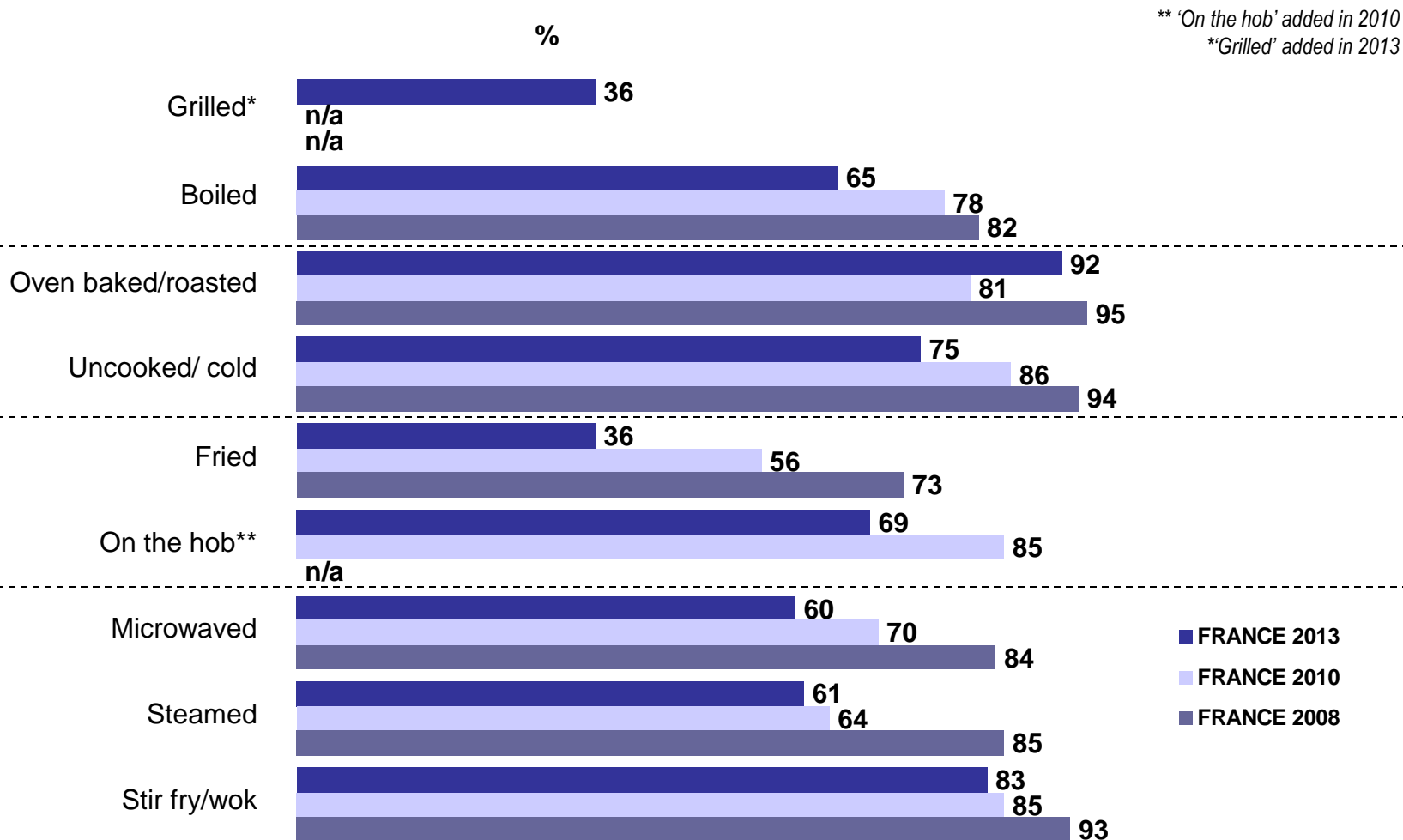
**FRANCE
2013
(62%)**



Q.14b Thinking about all the food you prepare in home, what proportion would you prepare in the following ways?

Preparation of Food in Home

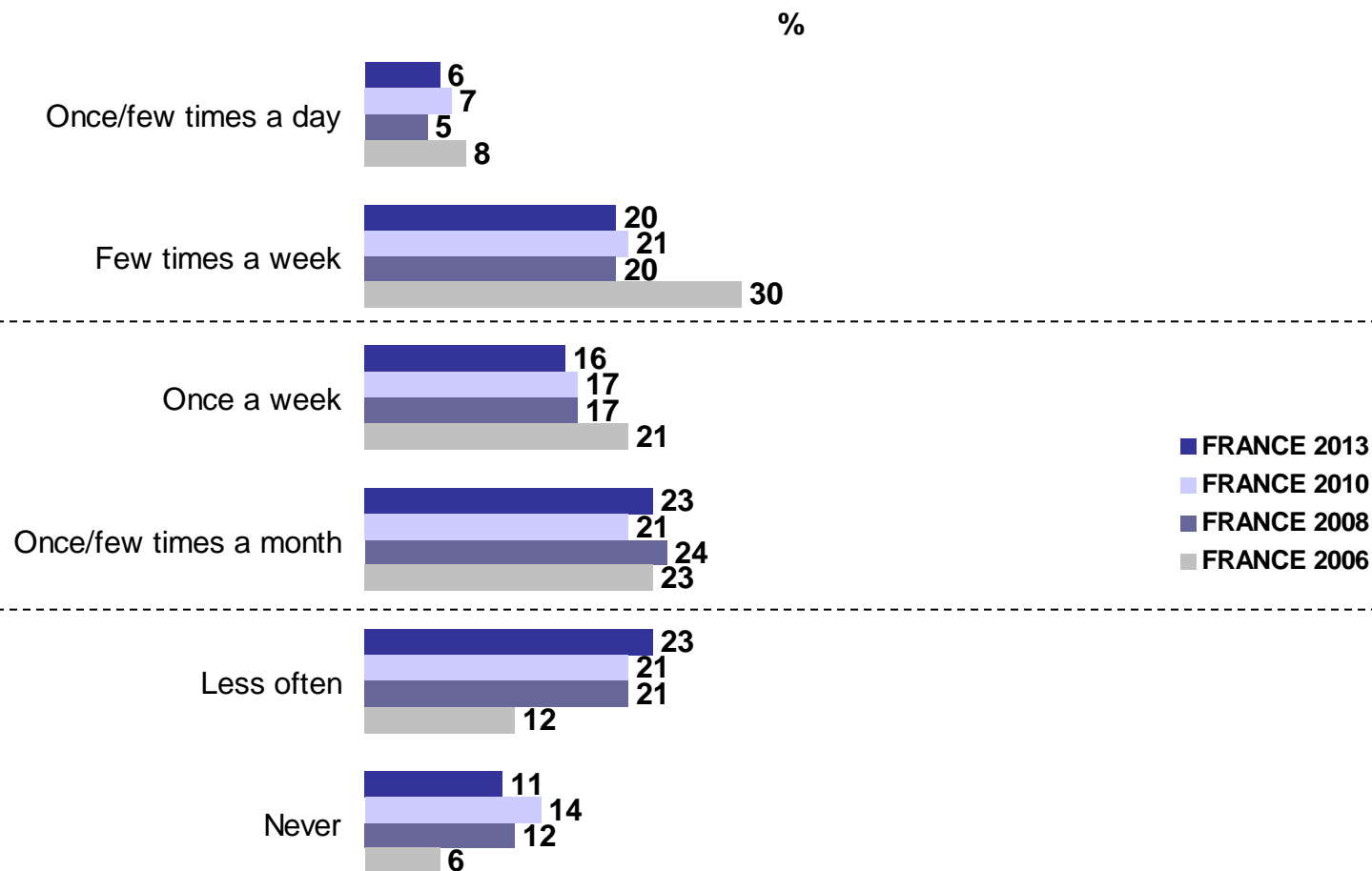
32



Q.14b Thinking about all the food you prepare in home, what proportion would you prepare in the following ways?

Frequency of Using Ready Prepared Ingredients

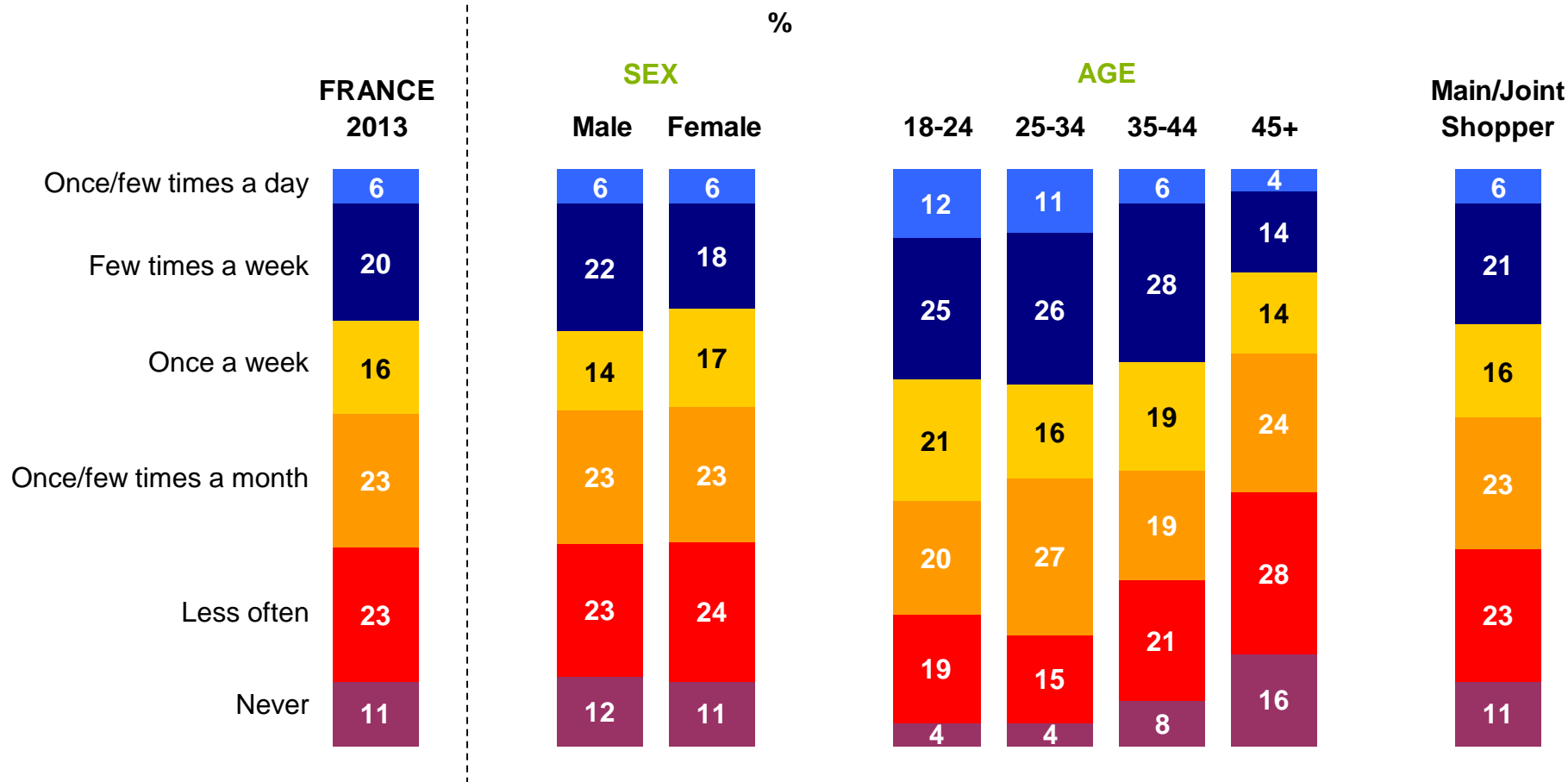
33



Q.8 When cooking at home how often do you use meal components, that is ready prepared ingredients that need to be added together for a meal? (e.g. jar of sauce and rice, or diced chicken and sauce etc.).

Frequency of Using Ready Prepared Ingredients – 2013

34

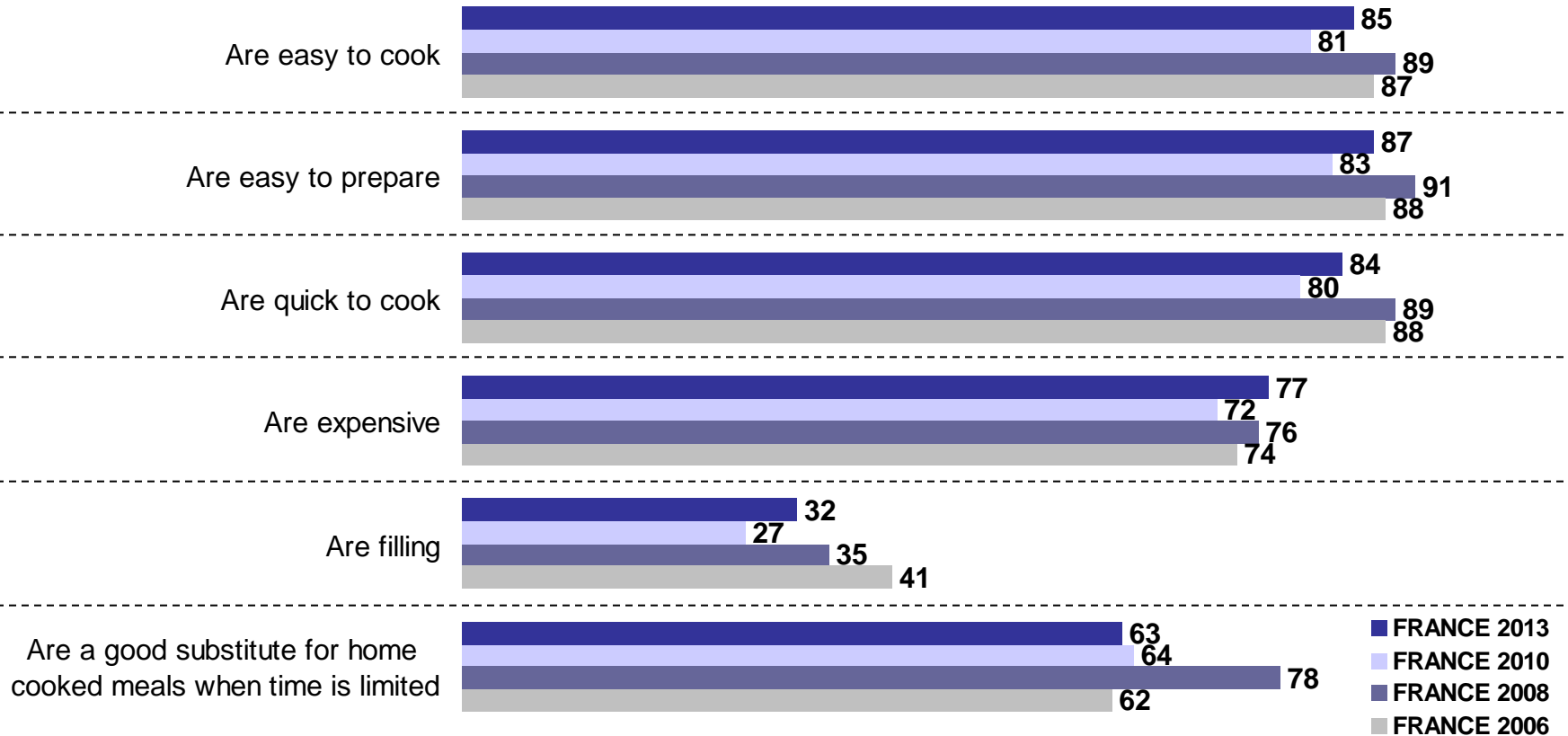


Q.8 When cooking at home how often do you use meal components, that is ready prepared ingredients that need to be added together for a meal? (e.g. jar of sauce and rice, or diced chicken and sauce etc.).

Attitude Towards Convenience Meals (I)

35

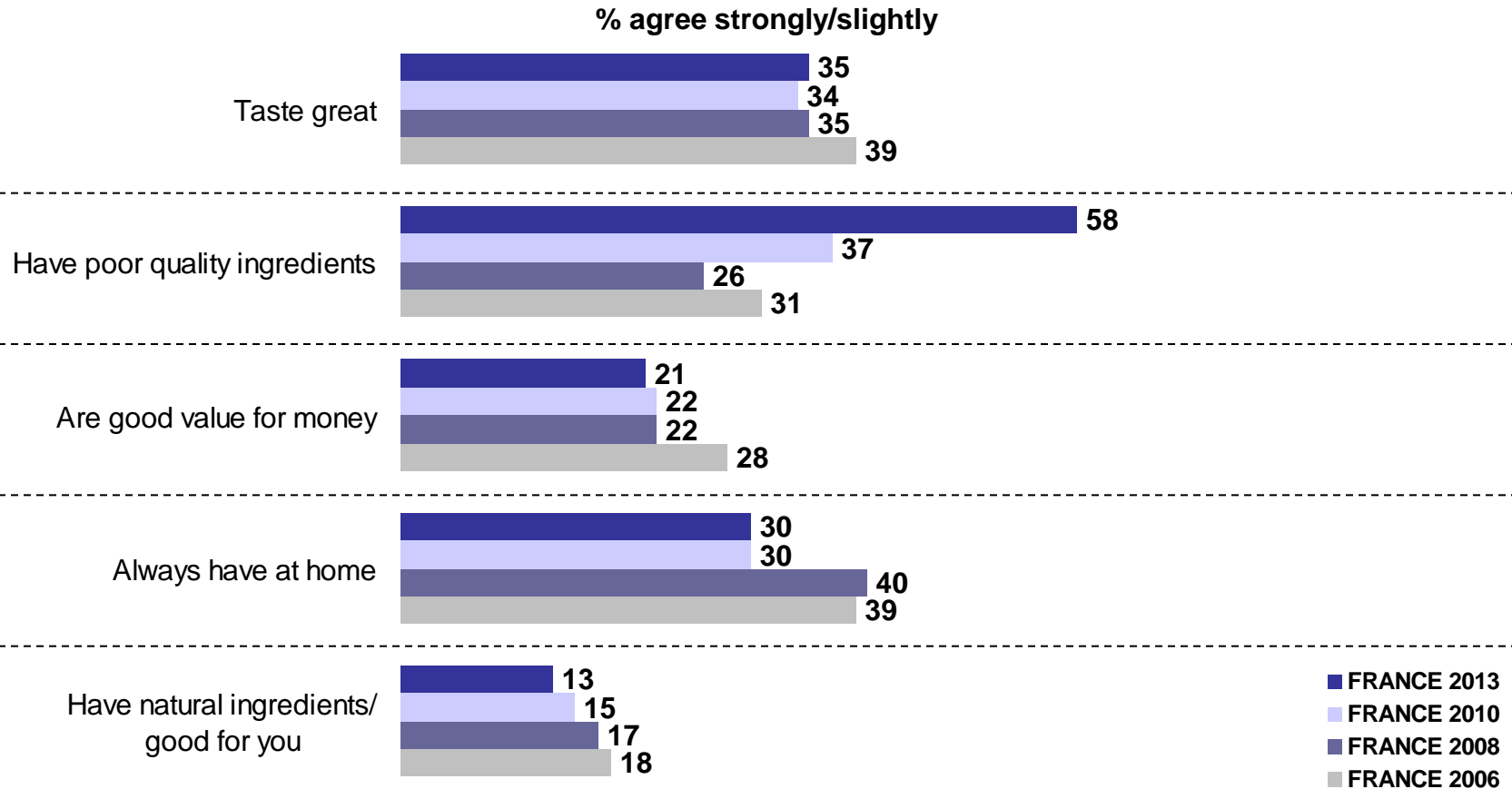
% agree strongly/slightly



Q.12 I am going to read out some things people have said about ready meals or convenience meals (by this I mean meals you buy that only need to be heated up) For each please tell me how strongly you agree or disagree with each statement.

Attitude Towards Convenience Meals (II)

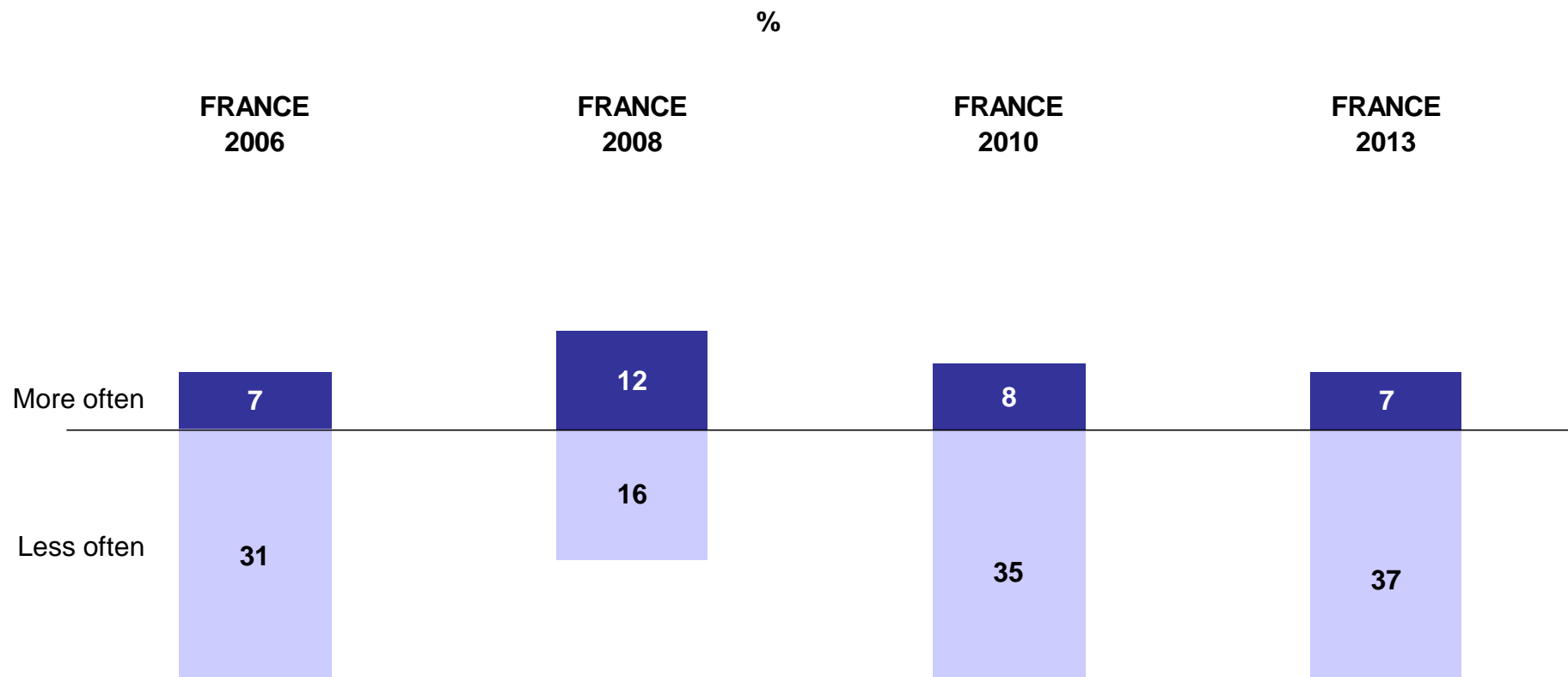
36



Q.12 I am going to read out some things people have said about ready meals or convenience meals (by this I mean meals you buy that only need to be heated up) For each please tell me how strongly you agree or disagree with each statement.

Incidence of Eating Convenience Meals

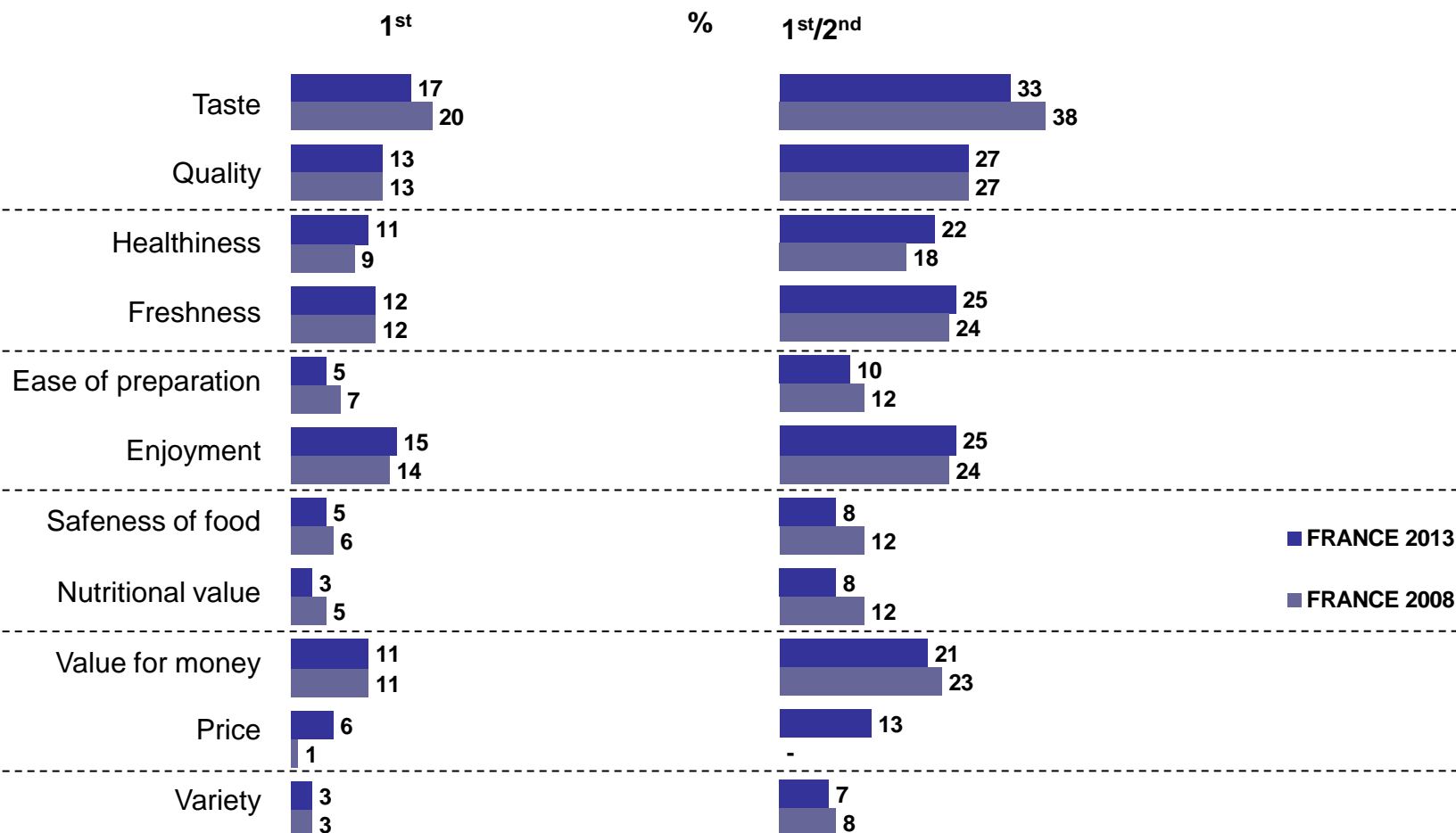
37



Q.11 Thinking back to 12 months ago, would you say that you are eating ready made/convenience meals more often, less often or about the same?

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

38



Q.24 Thinking about what are the most important considerations for you when eating/preparing food in home, can you rank the following factors from 1 to 11 where 1 is the most important consideration to 11 which is the least important consideration?

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French

Food Behaviours At Lunch Time

Food Behaviours At Lunch Time: Summary

40

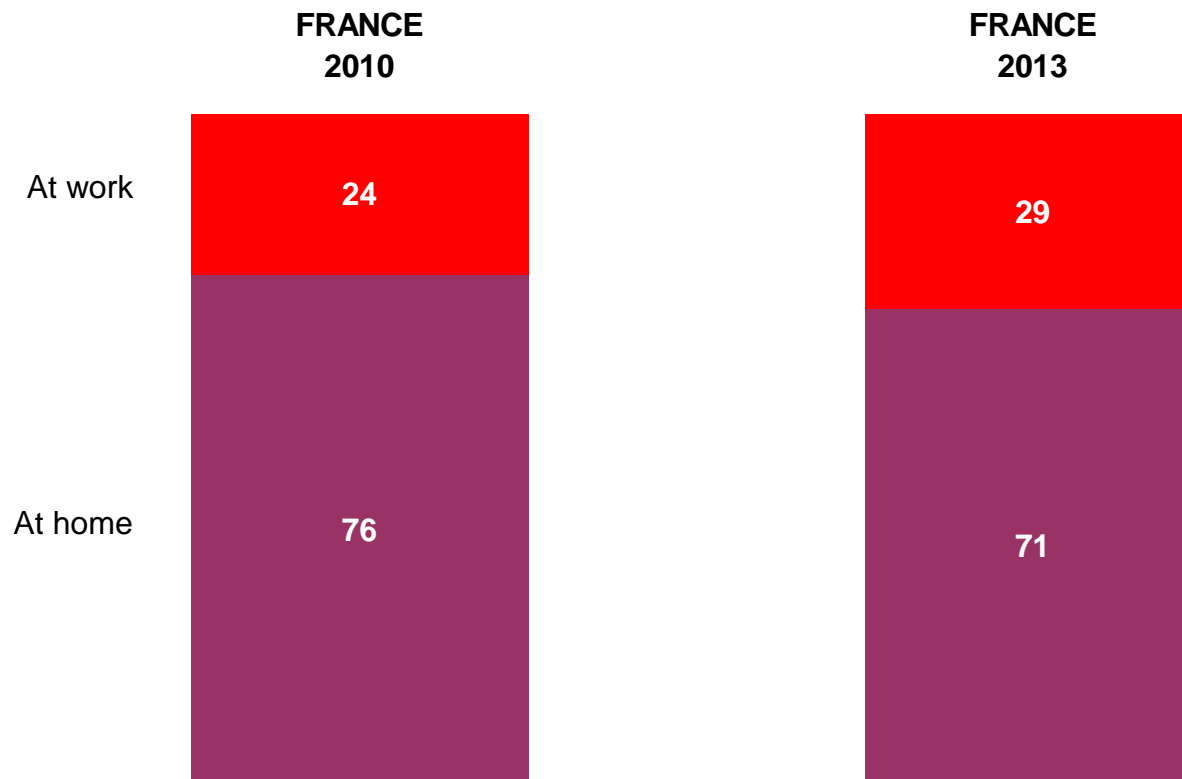
- The majority of adults in France usually eat their lunch at home. However, in 2013, almost 3 in 10 adults ate their lunch at work, an increase from 2010 levels.
- Bringing in your own lunch remains a popular trend with 45% claiming to be doing this more often than before.
- The proportion of people who claim to go out lunch less often than before has risen slightly since 2010 to 39%. However, the same proportion claim to be doing the same as before, suggesting there are many whose behaviours are unchanged in overall terms.
- The most popular components of children's lunchboxes in France are juice and water, followed by yoghurt and fruit.

Place Where Usually Eat Lunch

41

New question in 2010

%

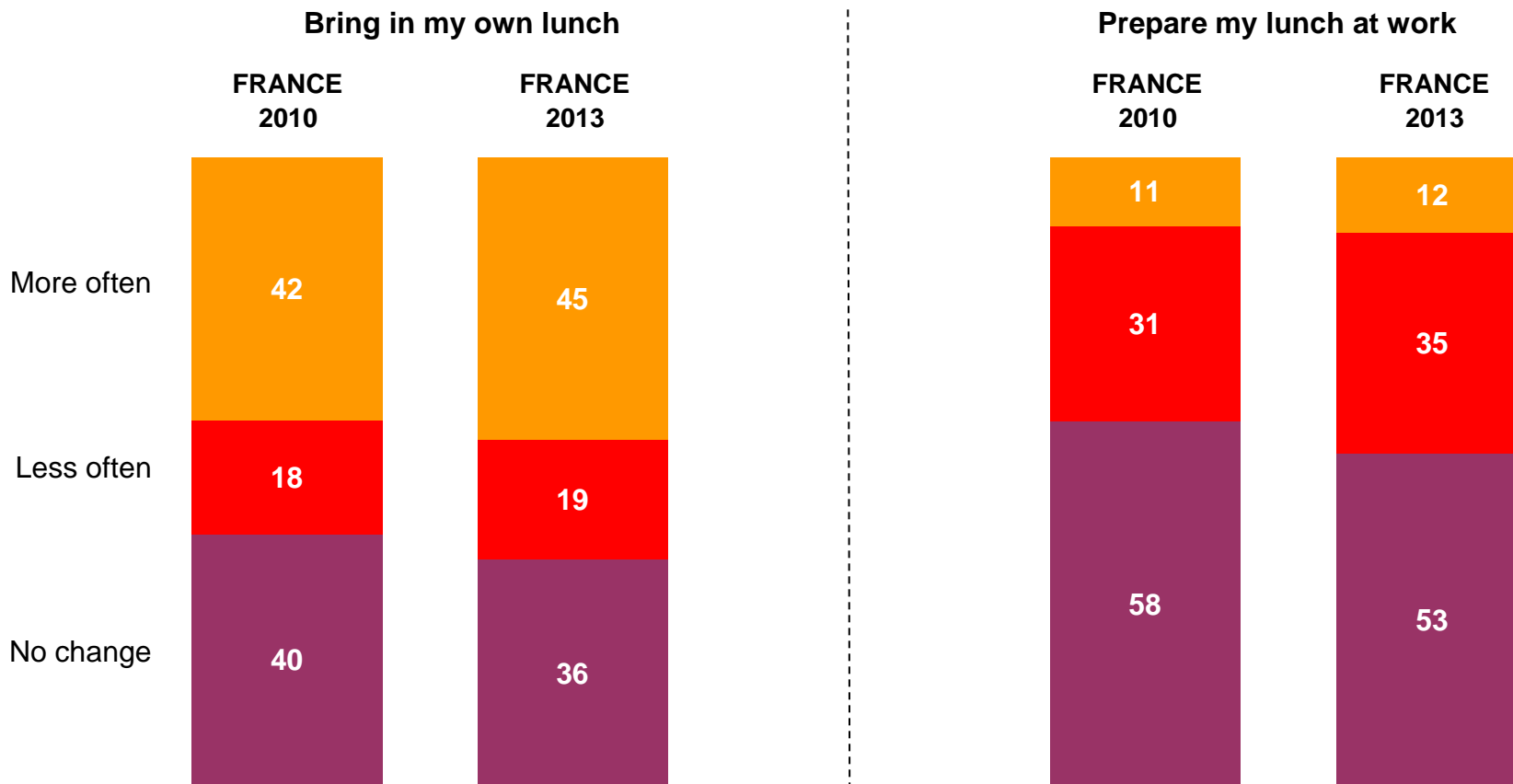


Q.16 During the week, do you usually eat lunch at work or at home?

Change In Frequency Of Workplace Lunchtime Habits (I)

42

New question in 2010



Q.17 For lunch at work, have you been doing any of the following more often or less often, or have you made no change?

Change In Frequency Of Workplace Lunchtime Habits (II)

43

New question in 2010



Q.17 For lunch at work, have you been doing any of the following more often or less often, or have you made no change?

Responsible For Preparing Kids Lunch Box

44

New question in 2010

% Yes

FRANCE 2010



10

FRANCE 2013



6

Yes



In 2013, Higher Amongst:

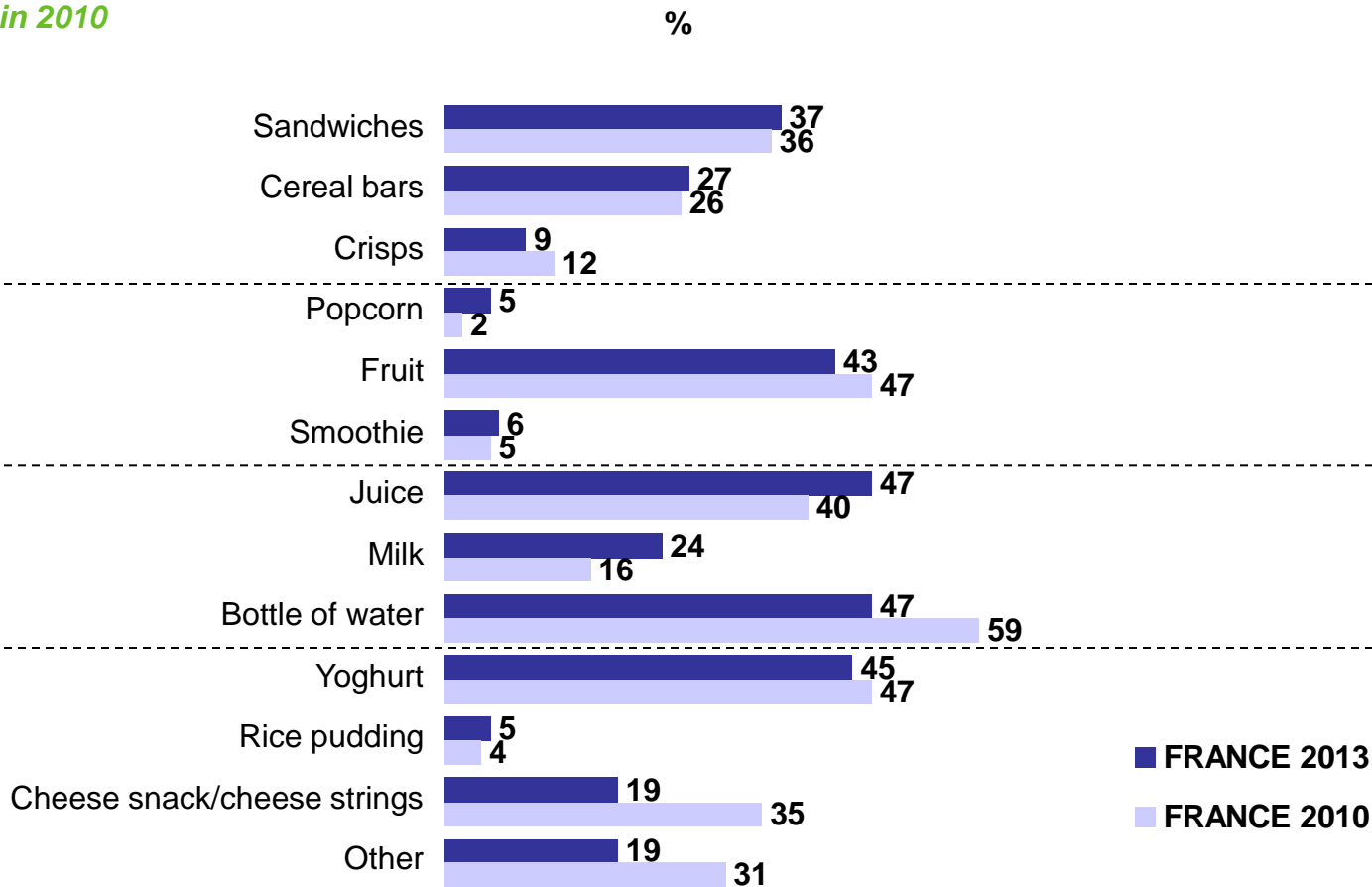
- 25-34 yrs
- 35-44 yrs
- Dependent kids
- 3+ in household
- Work full-time

Q.18 Do you have any children in your household for whom you are responsible for preparing their lunch pack/ lunch box?

Usual Contents Of Kids Lunch Boxes

45

New question in 2010



Q.19 What would their lunch boxes usually contain?

PERIscope2013



French Eating in Home

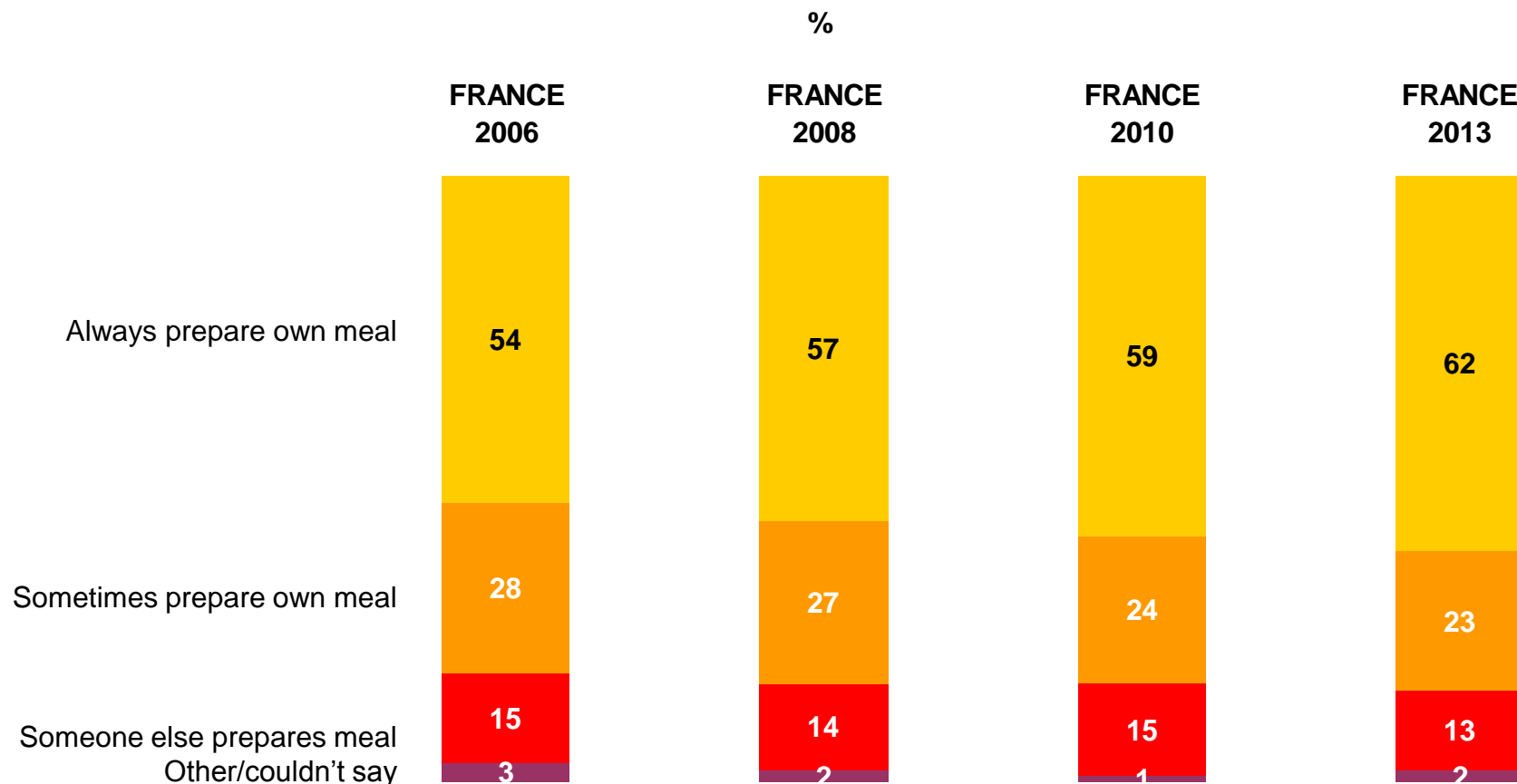
Eating In Home: Summary

47

- More and more of the French population are taking responsibility for preparing their own meals.
- Interestingly, the profile of those taking this responsibility has progressed to a more even gender balance than before. Improvements in responsibility levels among 18-24 year olds and 25-34 year olds can also be seen.
- More than 4 in 10 claim to be entertaining at home more often, a slight increase from 2010.
- Entertaining at home seems to have replaced a significant amount of the activity that may previously have taken place in pubs/ restaurants.
- The proportion of the adults never sitting down to breakfast as a family for breakfast has decreased from 21% to 16%.

Responsibility for Meal Preparation in the Home

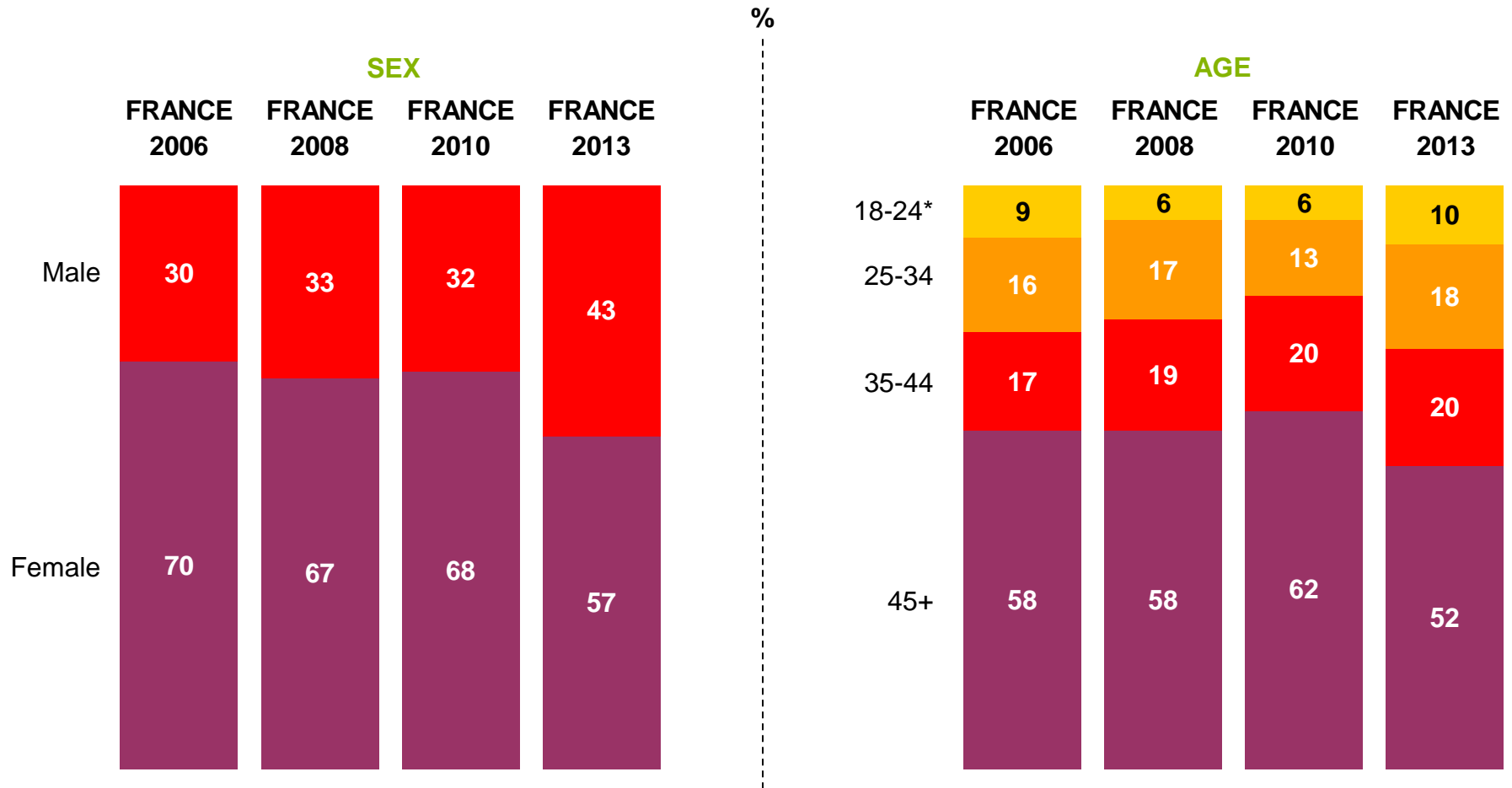
48



Q.14a Thinking in general about meals that involve some preparation, do you always prepare your own meals, sometimes prepare your own meals or does someone else usually do the meal preparation in your household?

Profile of Those Responsible for Meal Preparation in the Home

49



*In 2006, age category was 15-24

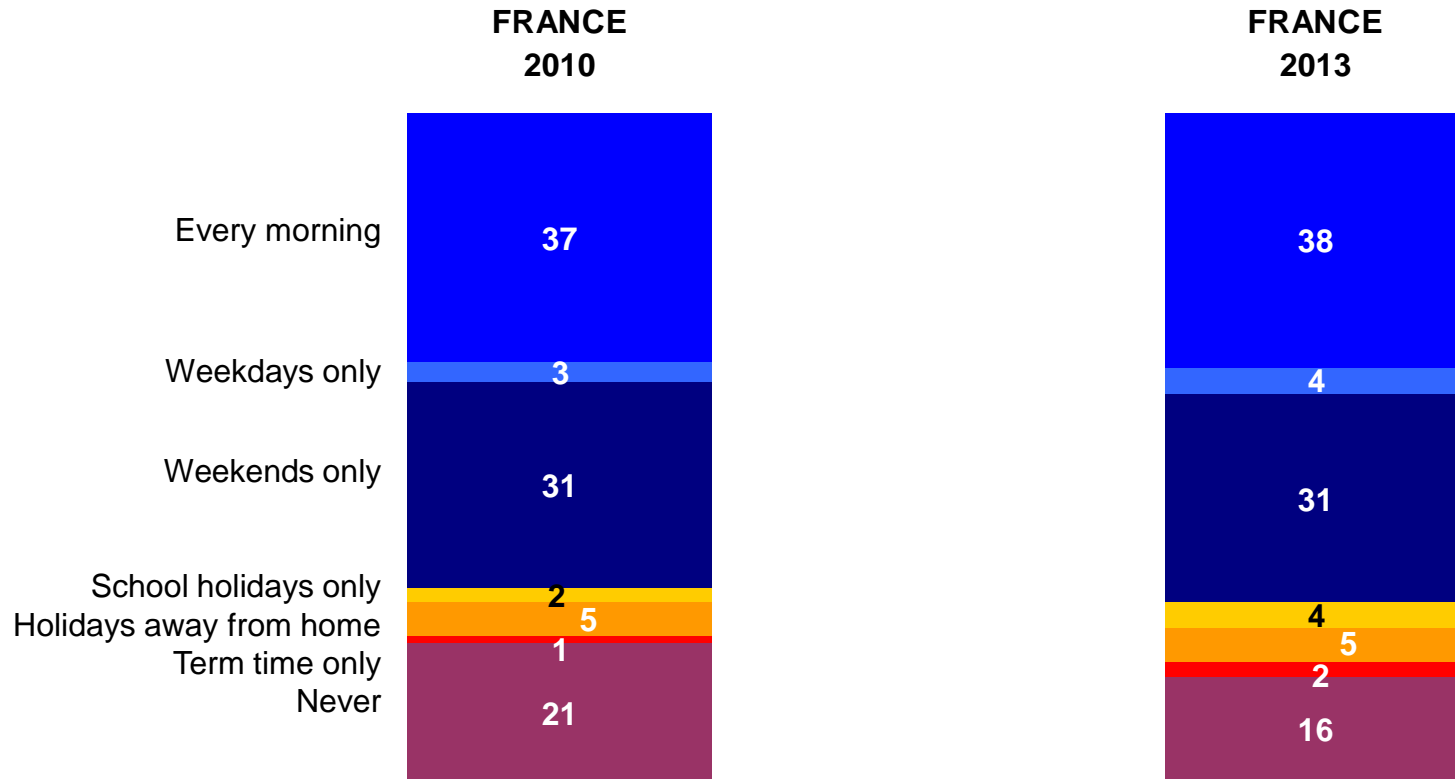
Q.14a Thinking in general about meals that involve some preparation, do you always prepare your own meals, sometimes prepare your own meals or does someone else usually do the meal preparation in your household?

Frequency of Family Sitting Down for Breakfast Together

50

New question in 2010

%

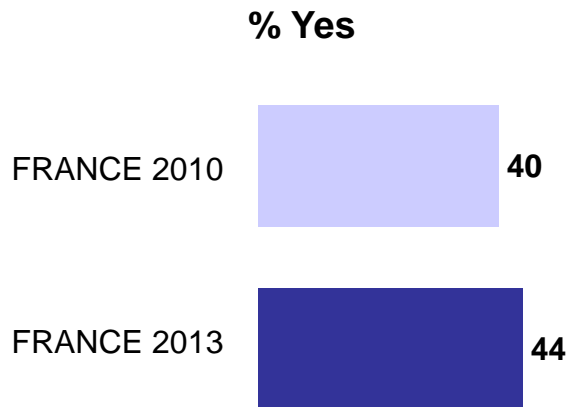


Q.15 About how often does your family as a whole sit down to a family or group breakfast?

Incidence Of Entertaining At Home More Often Nowadays

51

New question in 2010



Yes



In 2013, Higher Amongst:

- 3+ in household
- Can cook
- Cooking is a passion
- Main grocery shopper

Q.9 *Some people are entertaining at home more often nowadays instead of going out to eat or drink.
Do you find that you are entertaining at home more often, or not?*

Types Of Entertaining Done More Often Nowadays

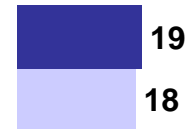
52

New question in 2010

% Entertaining at home more often 2013
% Entertaining at home more often 2010

FRANCE
(44%)
(40%)

Romantic meal in instead of going out



Having friends over instead of going to pub or restaurant



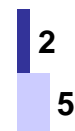
Family celebrations at home instead



A few drinks at home with your partner instead of going to the pub



Other



■ FRANCE 2013

■ FRANCE 2010

Q.10 And which, if any, of these types of entertaining in are you doing more often?

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French

Eating Out of Home

Eating Out Of Home: Summary

54

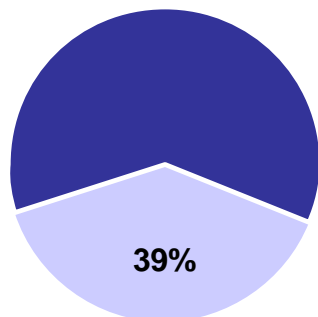
- The percentage of those who have eaten meals/ snacks on the premises of a pub/ restaurant/ cafe in the last seven days has declined steadily since 2008.
- The proportion of takeaway meals eaten off the premises where they were prepared (in the last 7 days) has shown a slight increase in consumption levels compared to 2010, though they remain lower than 2008 results at 29%.
- Getting meals/ snacks delivered is quite an unpopular activity . In 2013 only 10% of French adults claimed to have gotten a delivery of this kind in the last seven days.

Meals Eaten Out in the Last 7 Days

55

Meals or Snacks on the Premises of a Pub/Restaurant/Cafe

2013

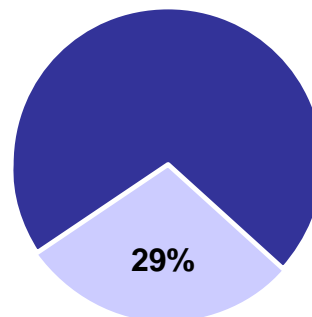


Incidence last 7 days

39%

Takeaway Meals Eaten Off the Premises Where They Were Prepared

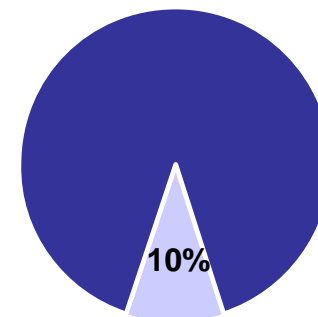
2013



29%

Meals or Snacks Delivered to Your Home

2013



10%

FRANCE 2010
FRANCE 2008
FRANCE 2006

(39%)
(47%)
(42%)

(27%)
(32%)
(24%)

(11%)
(15%)
(11%)

*Frequency in 2013
(no. of times – excl. zero)*

1.9

2.6

2.8

Q.25 In the last 7 days, that is since last.....(day of interview), how many of these types of meals, if any, have you eaten? By this I mean main meals, light meals or snacks, excluding meals eaten in canteens and meals prepared at home or taken from your home.

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French

Health & Wellbeing

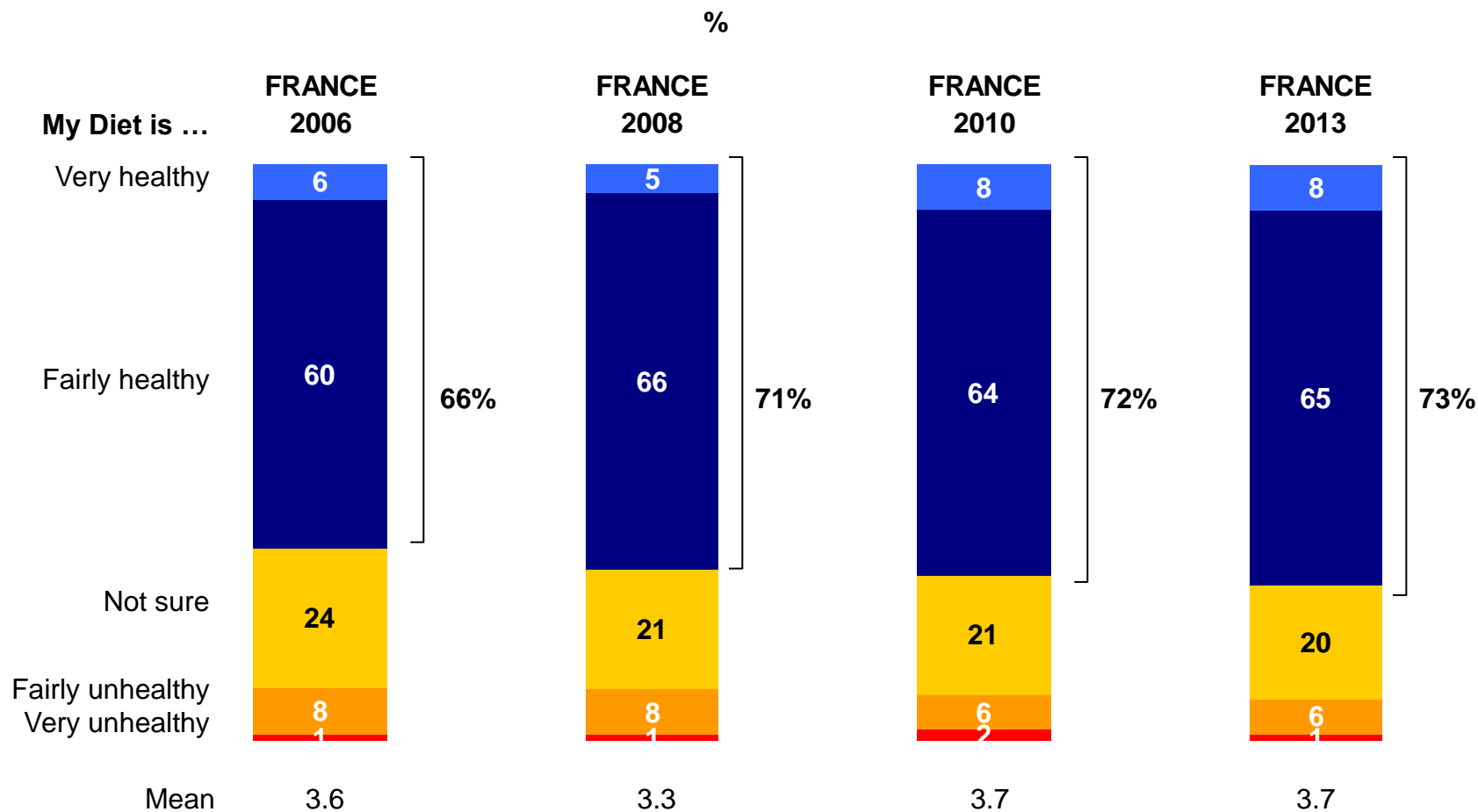
Health & Wellbeing: Summary

57

- The French's description of their own diet is quite positive. The nation's level of healthiness has remained consistent with 2008 and 2010 levels. However, 1 in 5 are unsure about whether their diet is healthy or not.
- The importance of the eating properly message is widely understood by the French adult population. The vast majority are also conscious of the nutritional benefits of food, a factor that has gained support in recent years.
- The link between good food/ good diet and mental health and wellbeing are also well understood. Enacting this understanding through food behaviours such as trying to eat a balanced diet, trying to buy foods that are natural and limiting the amount of fast food they consume is evident.
- Attitudes towards 'healthy options' food stuffs show that there is an appetite for manufacturers to help people to be healthy. Almost three quarters of all adults claim to be willing to pay more for healthy food as long as it tastes good.
- With more than three quarters of adults admitting to finding it difficult to understanding in terms of "the nutritional claims on packaging" and "understanding labelling on food" it is clear that more needs to be done on easing the confusion around food labelling.

Overall Descriptors of Diet

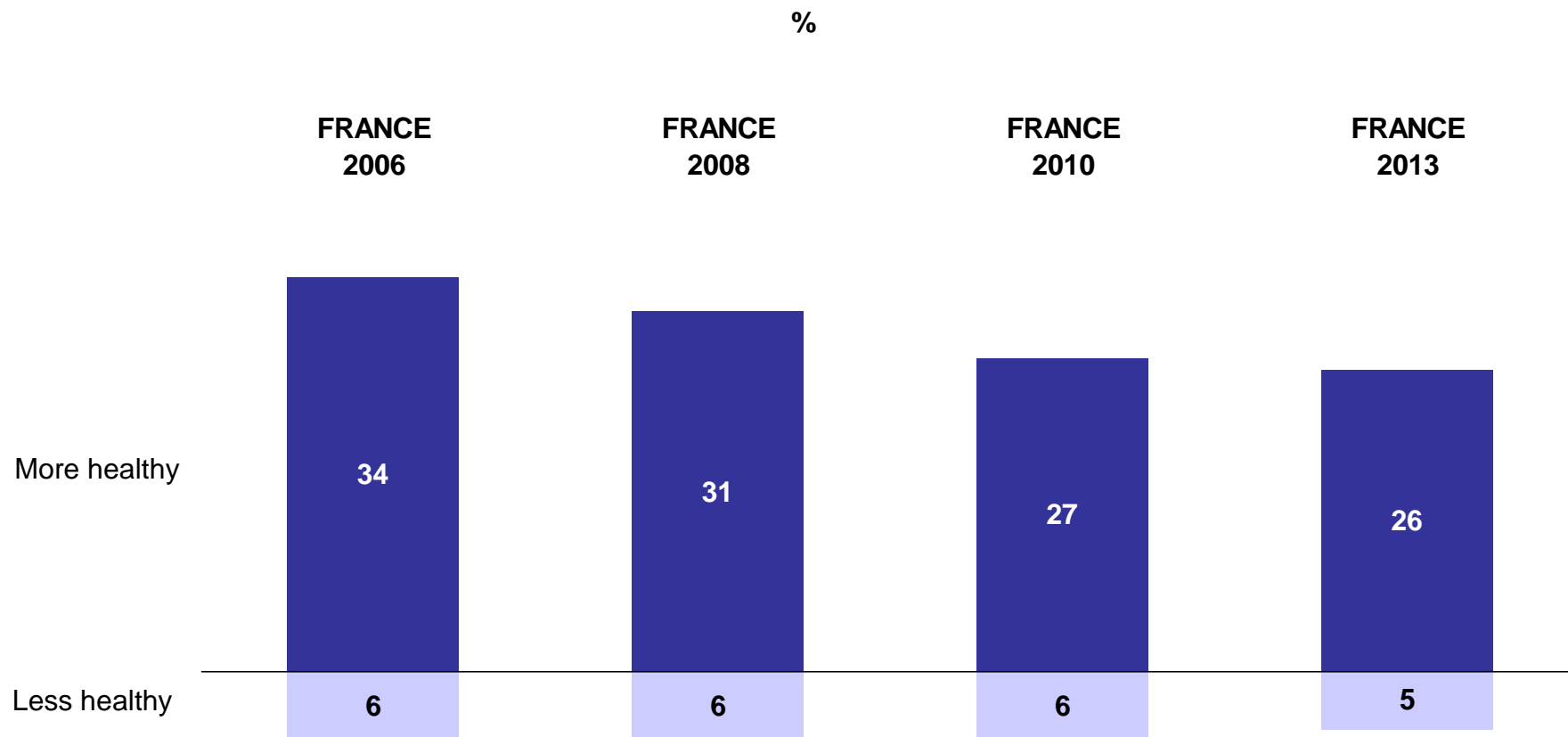
58



Q.29 How would you describe your diet overall?

Change in Eating Habits in the Last Year

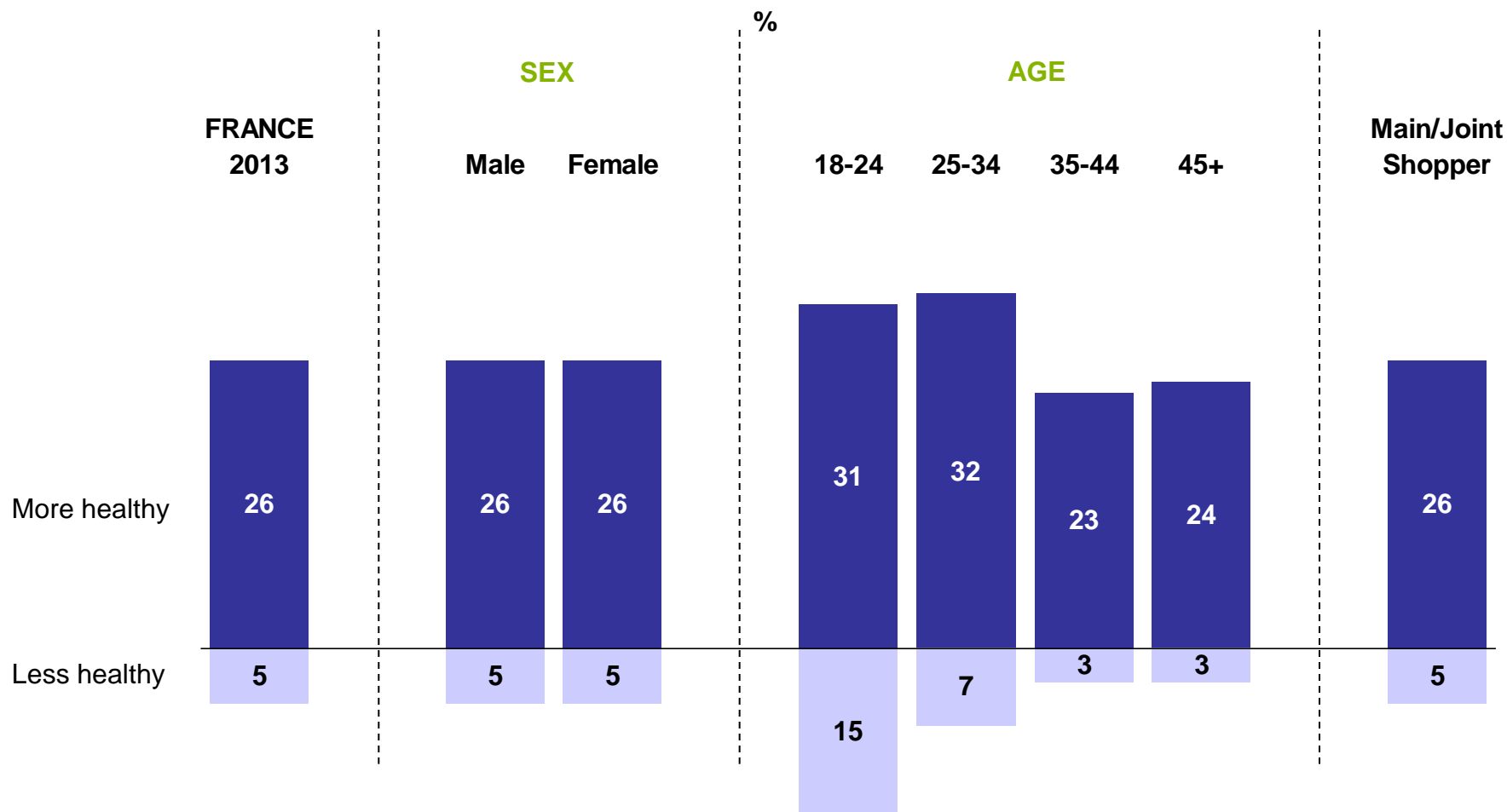
59



Q.30 Overall in the last year do you think your eating habits have become more or less healthy or have they remained the same?

Change in Eating Habits in Last Year – 2013

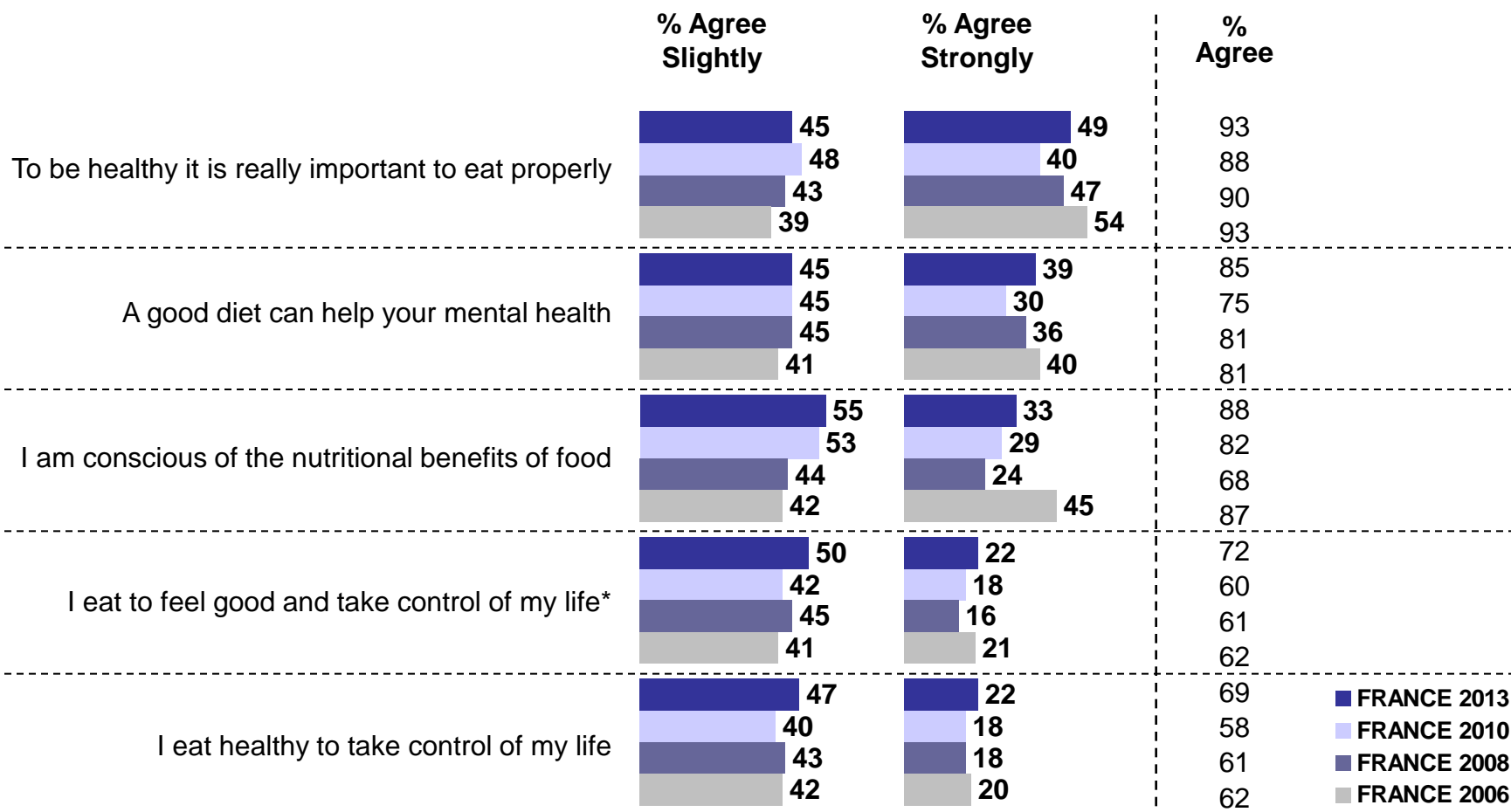
60



Q.30 Overall in the last year do you think your eating habits have become more or less healthy or have they remained the same?

Attitude Towards Diet (I)

61

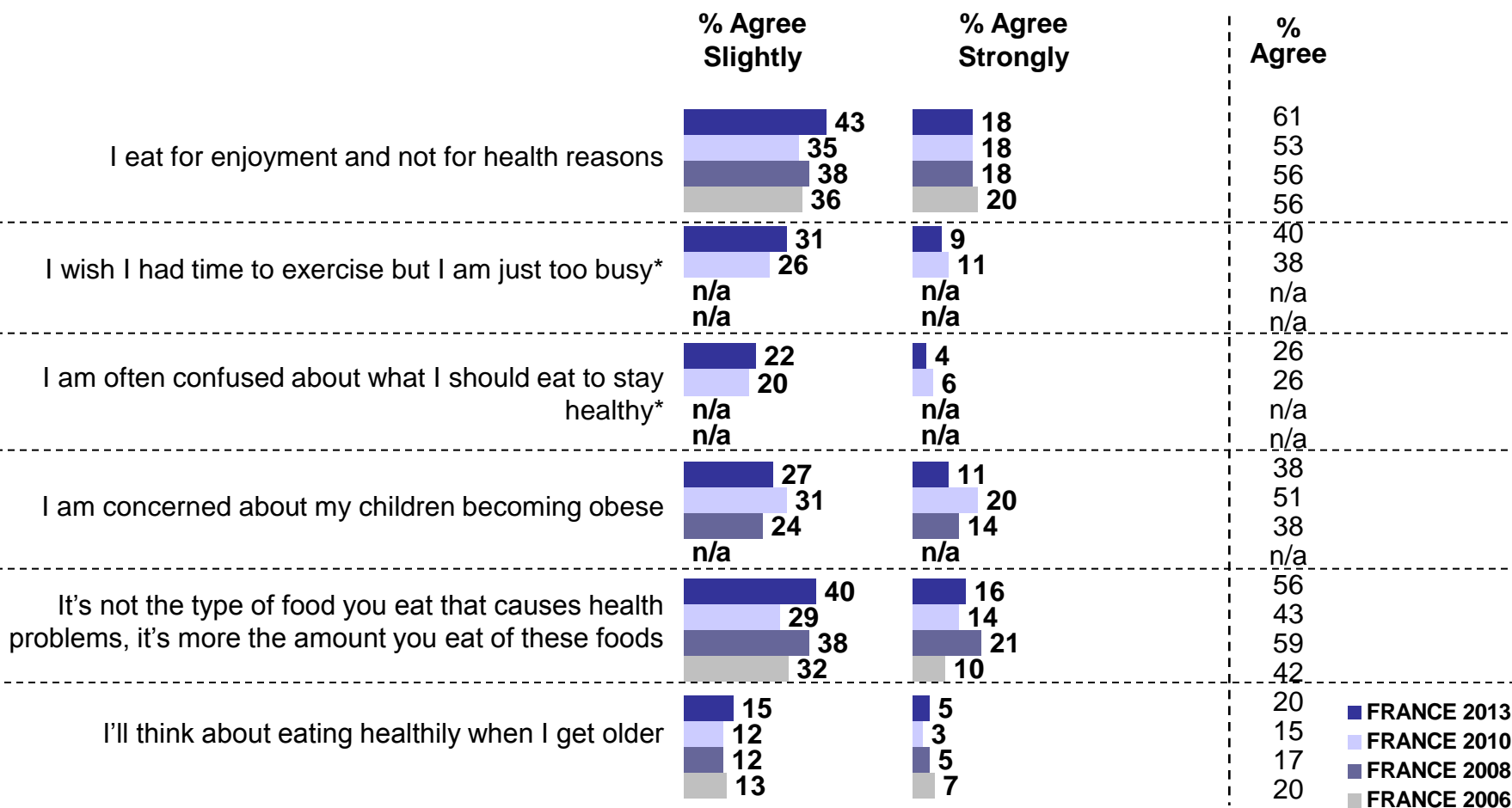


* Caution - wording change in 2010

Q.2 Now I am going to read out things people have said about their diet and general well-being. Please tell me how much you agree/disagree with each statement on a scale of 1 to 5 where 5 = Agree Strongly and 1 = Disagree Strongly.

Attitude Towards Diet (II)

62

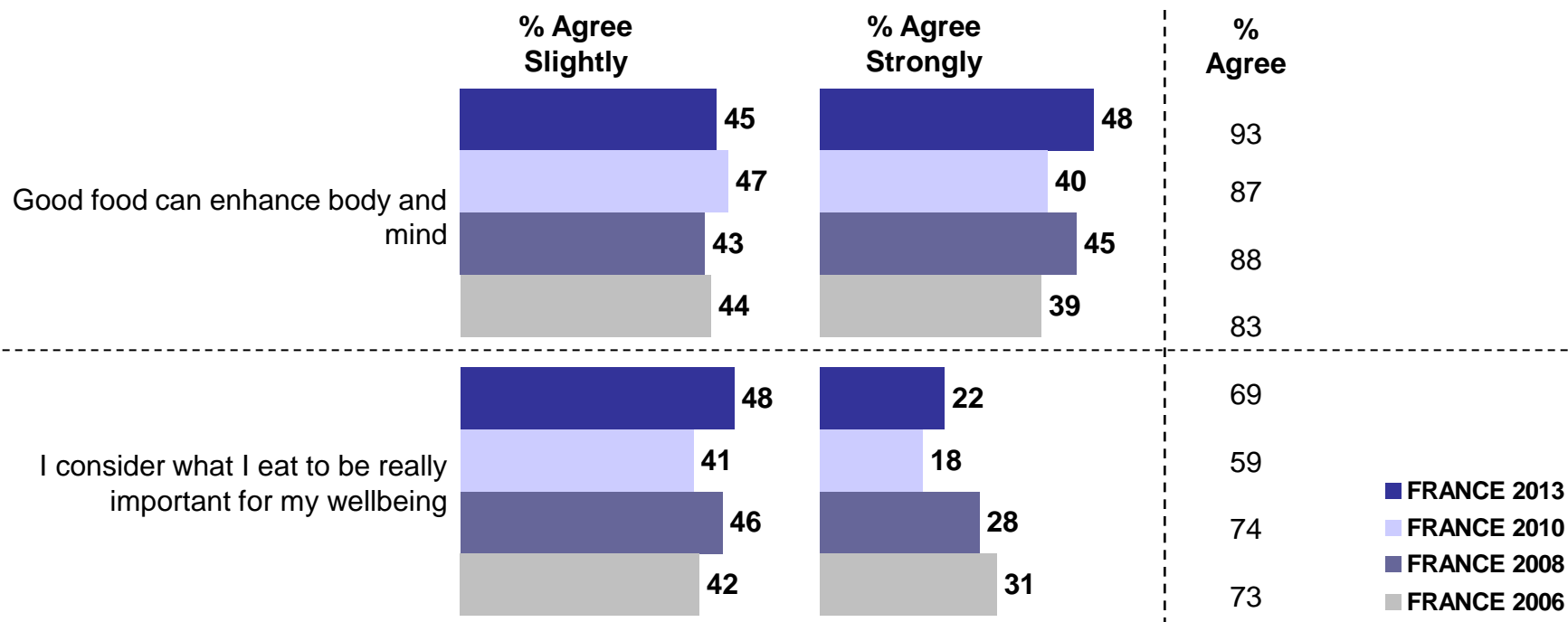


* New statement added 2010

Q.2 Now I am going to read out things people have said about their diet and general well-being. Please tell me how much you agree/disagree with each statement on a scale of 1 to 5 where 5 = Agree Strongly and 1 = Disagree Strongly.

Attitude Towards Wellbeing

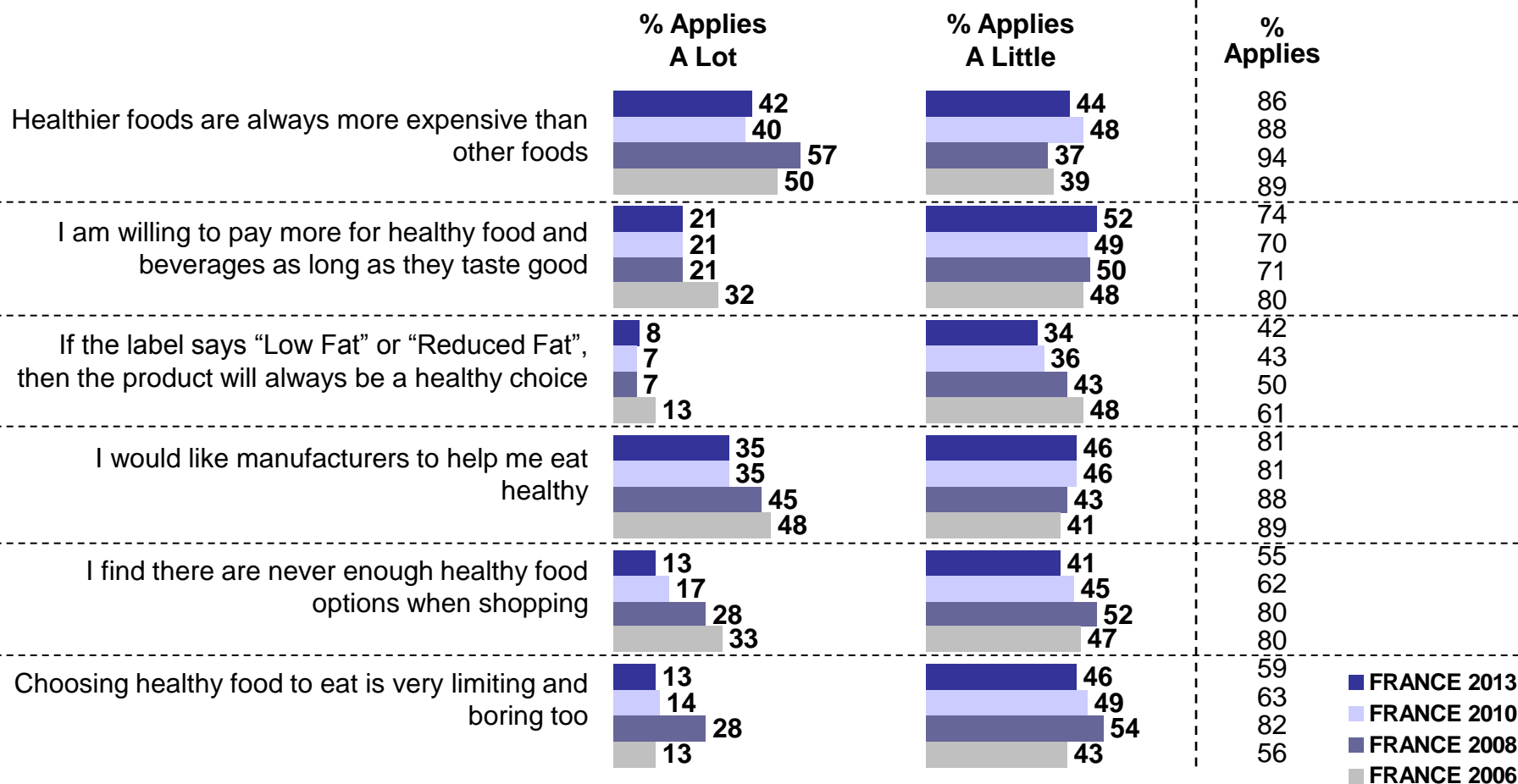
63



Q.2 Now I am going to read out things people have said about their diet and general well-being. Please tell me how much you agree/disagree with each statement on a scale of 1 to 5 where 5 = Agree Strongly and 1 = Disagree Strongly.

Attitudes Towards Healthy Options

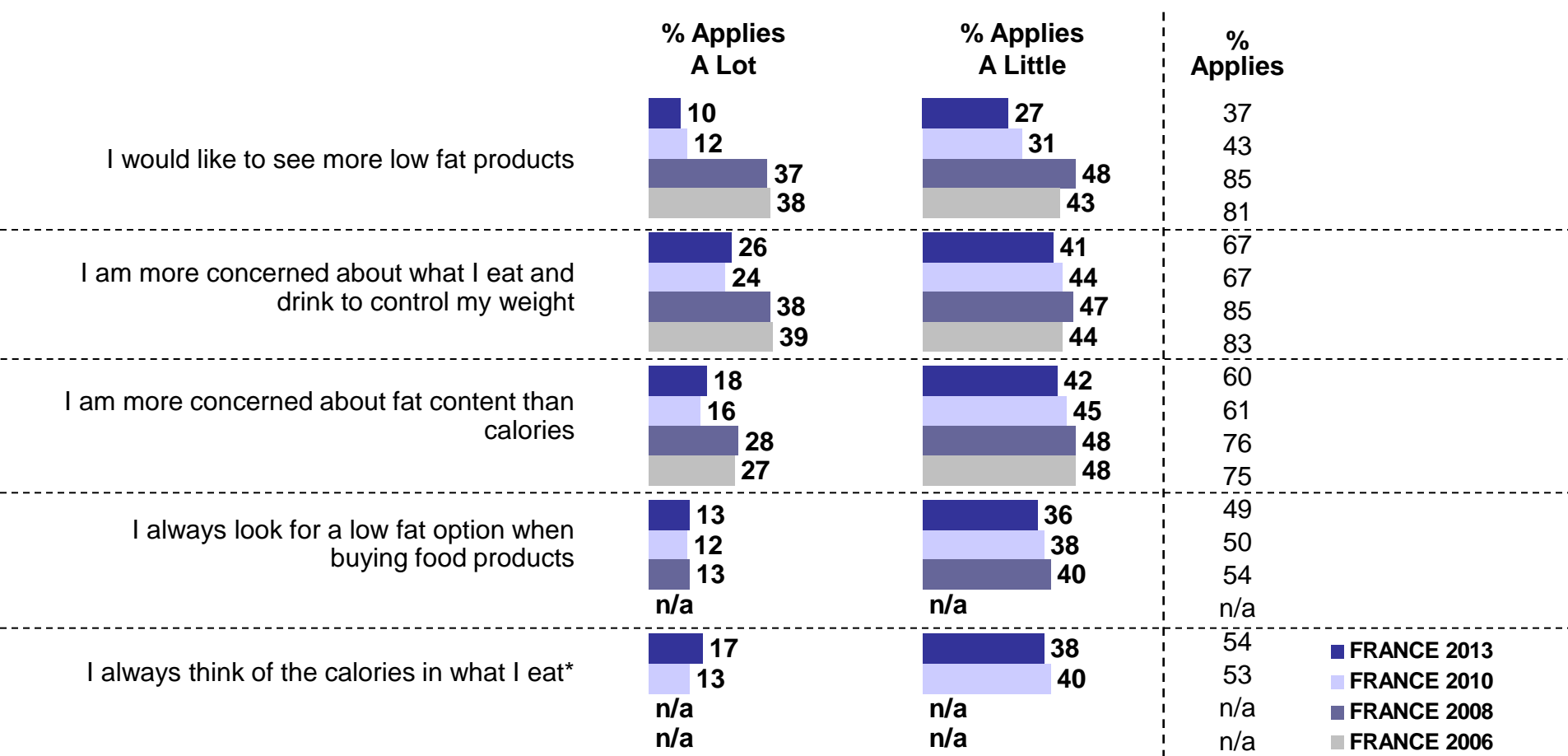
64



Q.32/Q.33 I am going to read out a number of statements people have said about health and nutrition. I would like you to tell me whether each statement applies to you personally a lot, a little or not at all.

Attitude Towards Calories/Fat Content

65

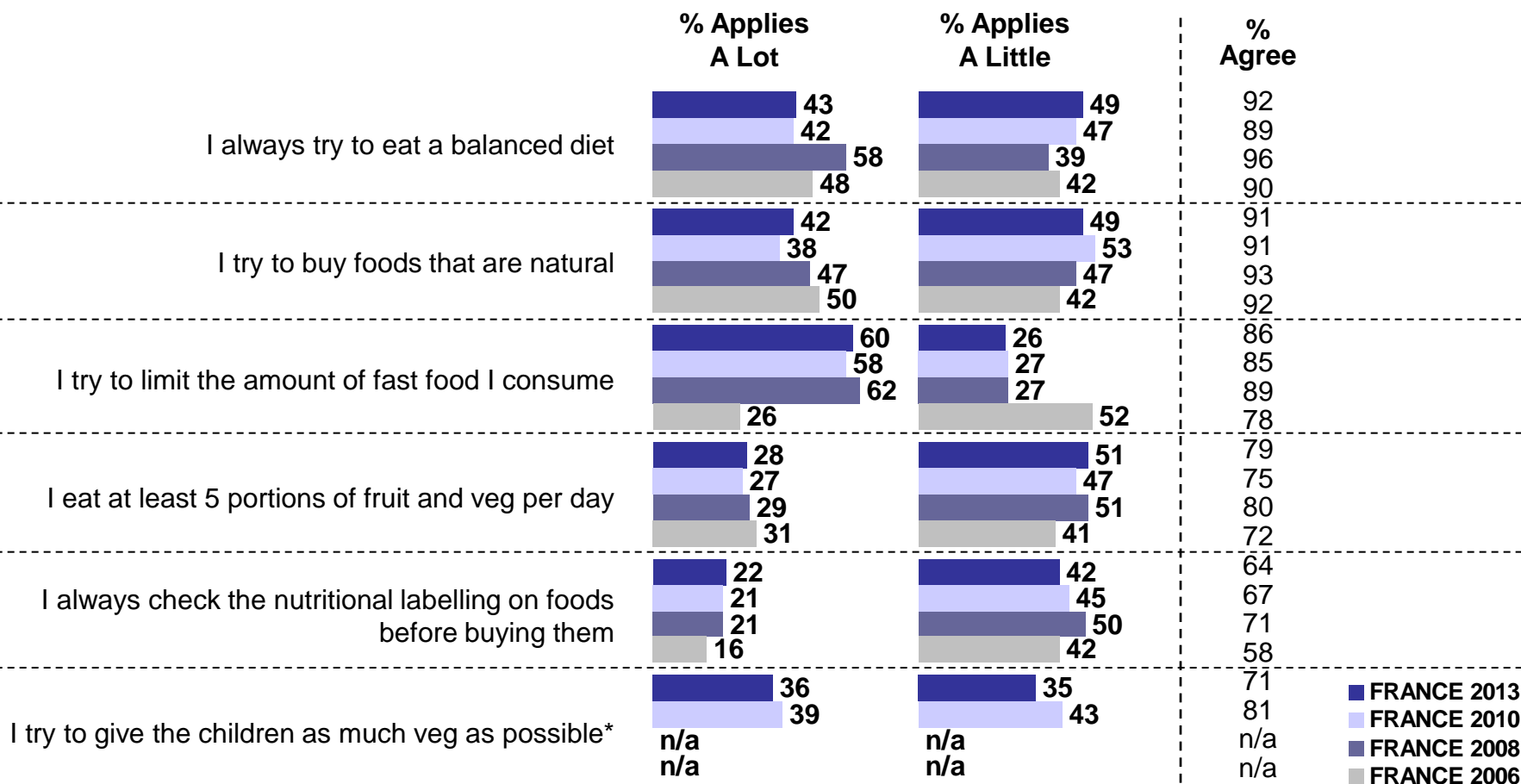


* New statement added 2010

Q.32/Q.33 I am going to read out a number of statements people have said about health and nutrition.
I would like you to tell me whether each statement applies to you personally a lot, a little or not at all.

Attitude Towards Balanced/Healthy Diet

66

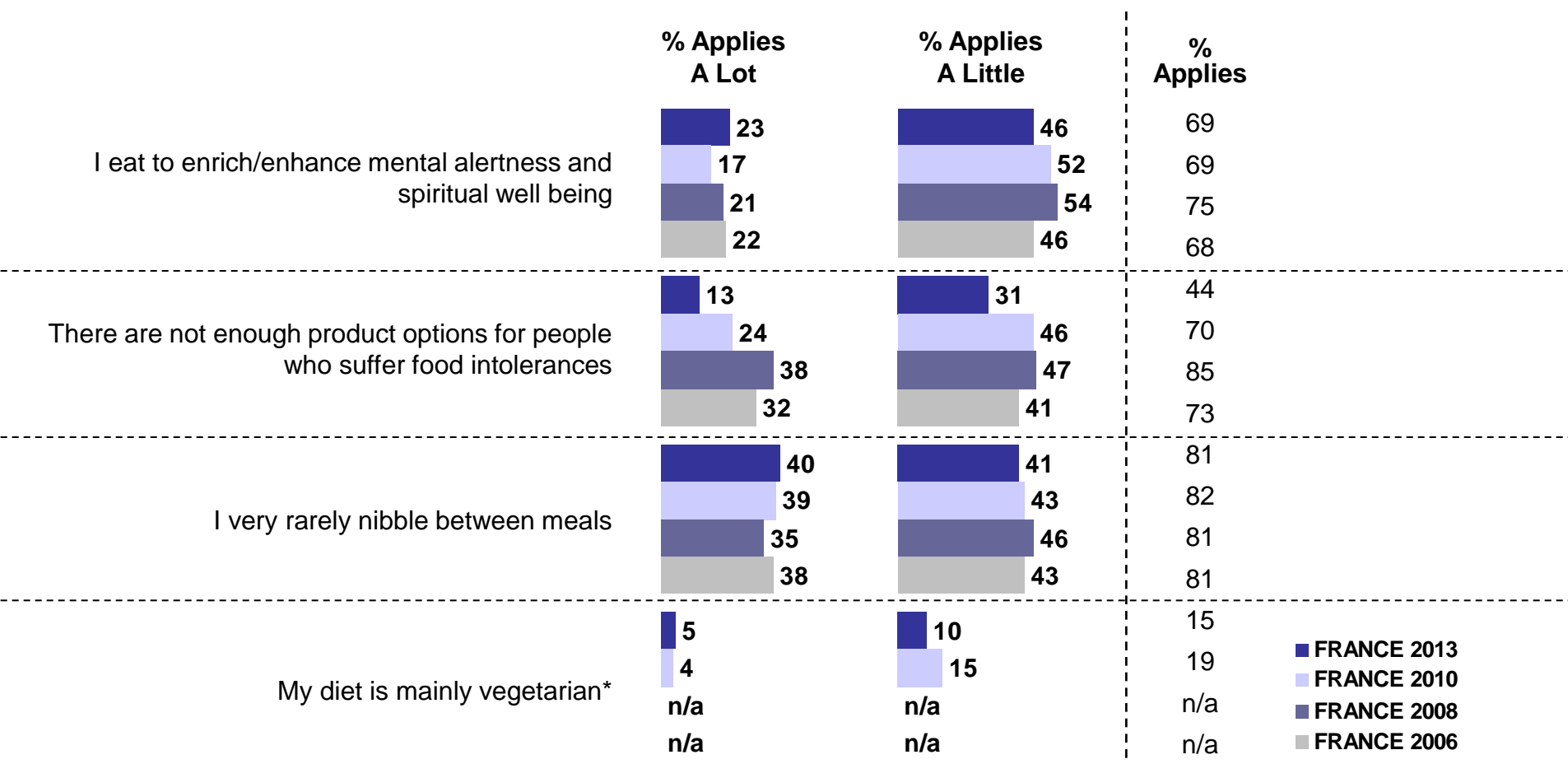


* New statement added 2010

Q.32/Q.33 I am going to read out a number of statements people have said about health and nutrition.
I would like you to tell me whether each statement applies to you personally a lot, a little or not at all.

Attitude Towards Nutrition & Wellness

67

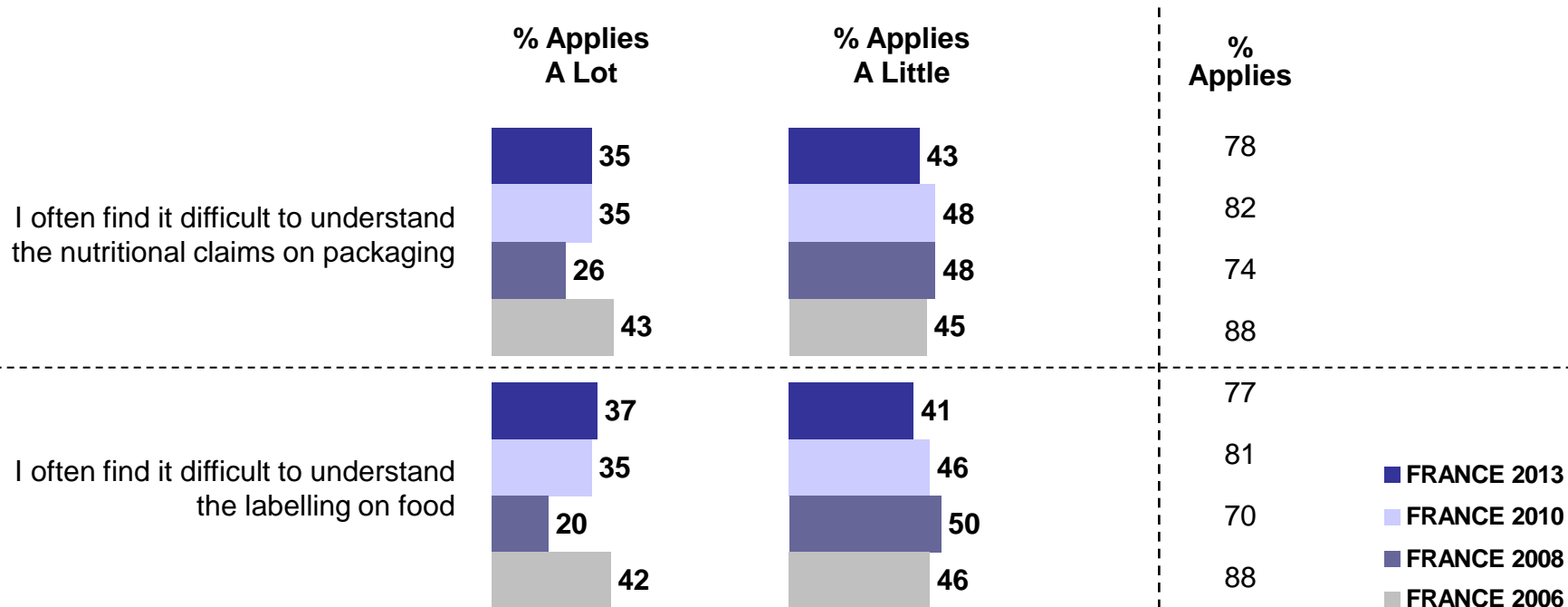


Q.32/Q.33 I am going to read out a number of statements people have said about health and nutrition.
I would like you to tell me whether each statement applies to you personally a lot, a little or not at all.

* New statement added 2010

Attitude Towards Health Products/Labelling

68



Q.32/Q.33 I am going to read out a number of statements people have said about health and nutrition.
I would like you to tell me whether each statement applies to you personally a lot, a little or not at all.

PERIscope2013



French Environmental Issues

Environmental Issues: Summary

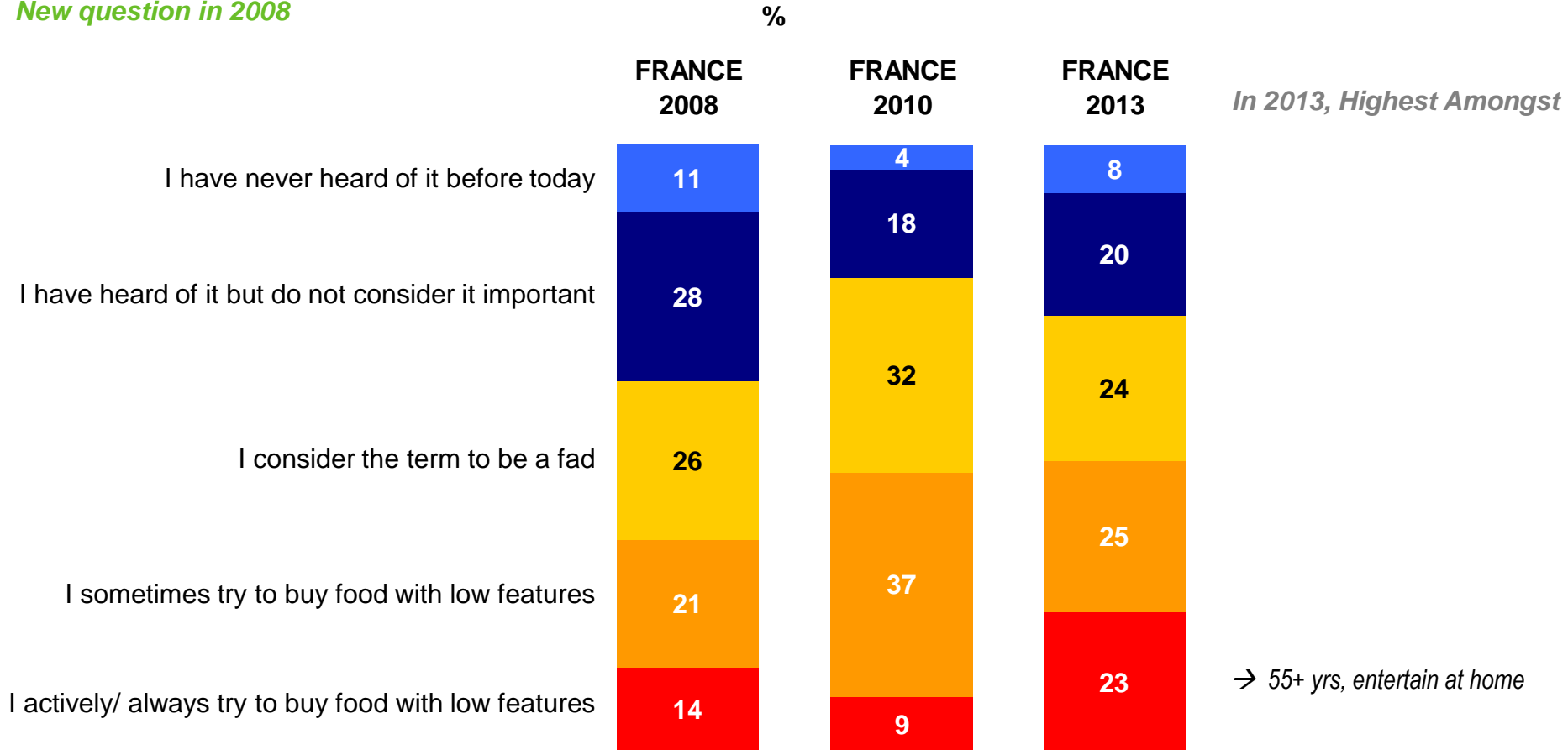
70

- The positivity around sustainable foods has increased with more people now stating that they would either sometimes/ actively/always buy 'sustainable' food than before.
- While awareness about carbon footprint has improved since 2008, there are now more people than before who think that it is not important. Those buying food with a low carbon footprint have remained at 2010 levels.
- The awareness of food miles as been rising steadily since 2008. Within this time too, the proportion of people who claim to buy food with low food miles has increased with the proportion actively buying increasing significantly.
- More than 6 in 10 French adults claim to be more conscious of environmental issues in their choice of products today.
- The preference to buy from companies that are aware of the impact of environmental issues has decreased slightly since 2008. However, it remains an important consideration for 59% of people.

Attitudes towards Sustainability

71

New question in 2008

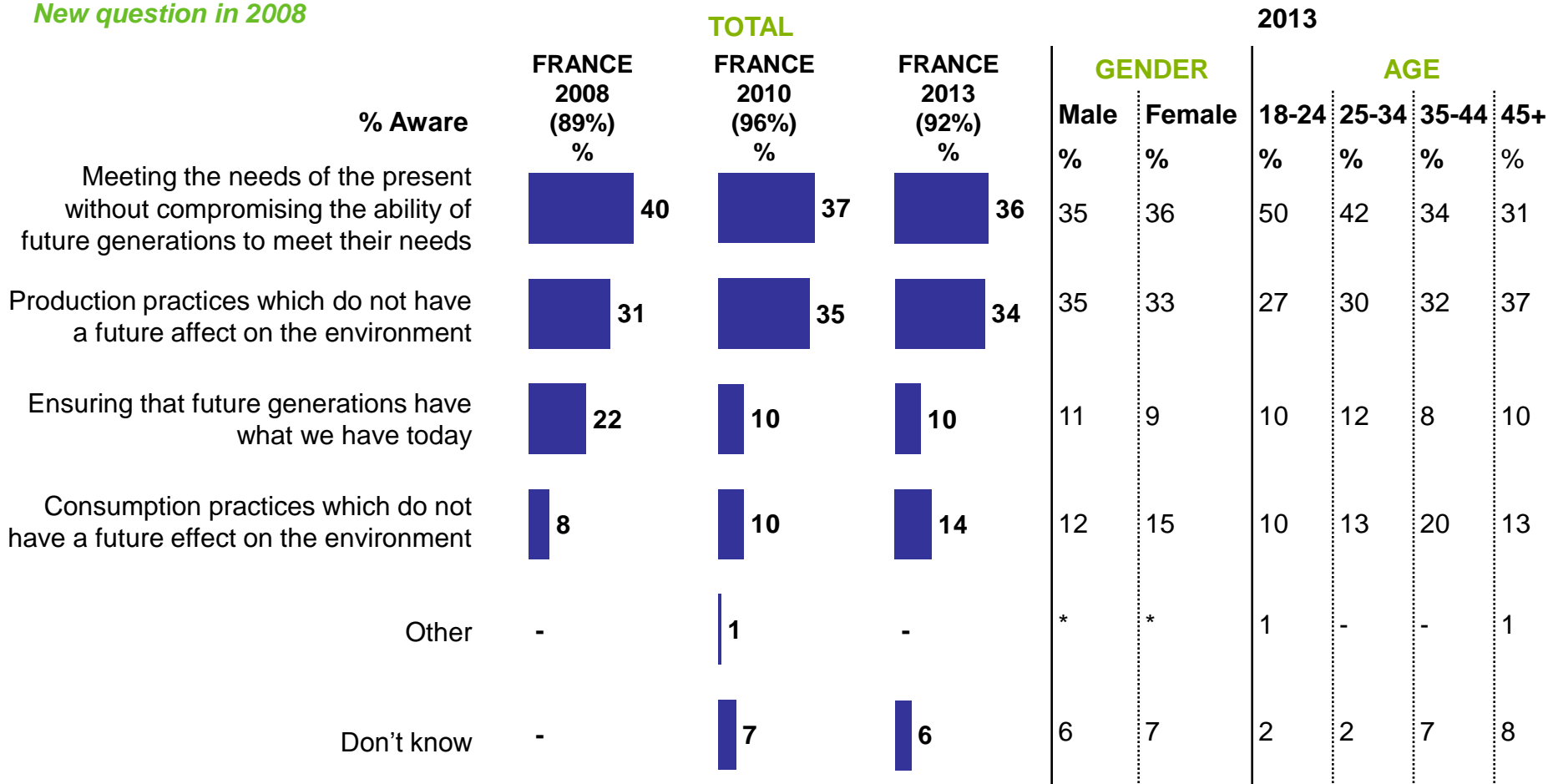


Q.42 Thinking specifically about 'Sustainability', which of the following statements best describes you're attitude towards the term?

Understanding of the Term Sustainability

72

New question in 2008

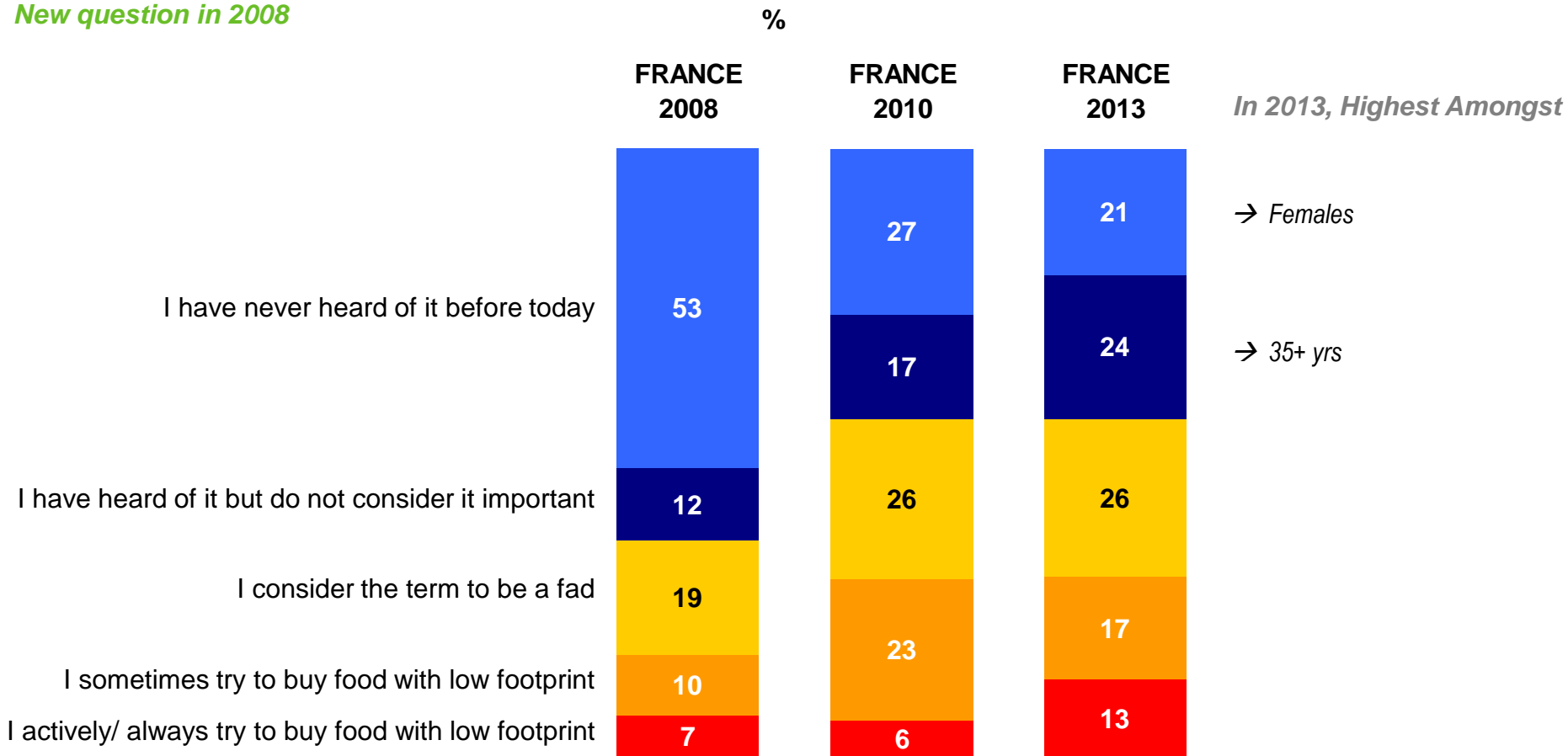


Q.44 What do you understand the term "Sustainability" to mean?

Attitudes towards Carbon Footprint

73

New question in 2008

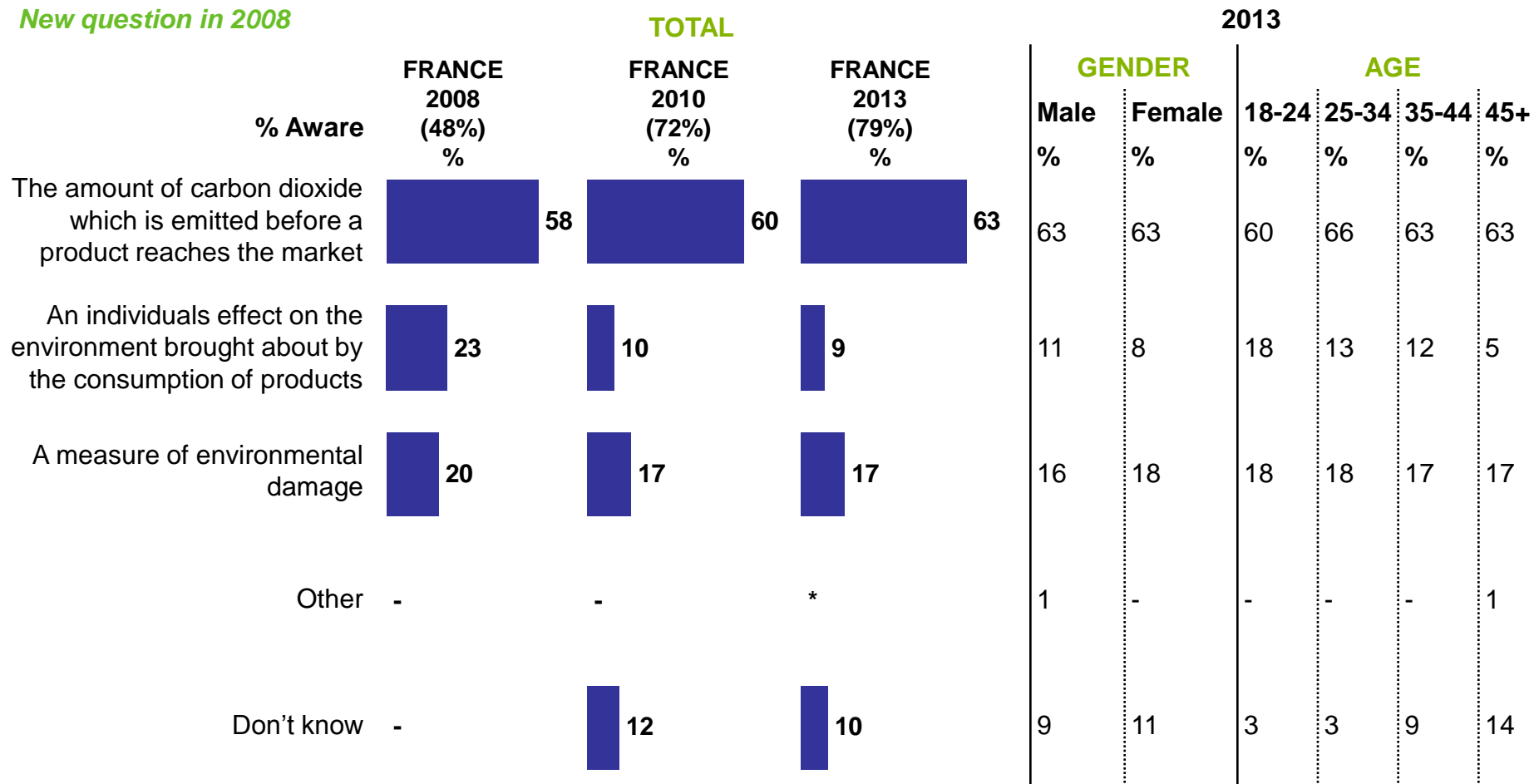


Q.42 Thinking specifically about 'Carbon Footprint', which of the following statements best describes you're attitude towards the term?

Understanding of the Term Carbon Footprint

74

New question in 2008



Q.45 What do you understand the term "Carbon Footprint" to mean?

Attitudes towards Food Miles

75

New question in 2008

%

**FRANCE
2008**

**FRANCE
2010**

**FRANCE
2013**

In 2013, Highest Amongst

→ 35-44 yrs

I have never heard of it before today

68

53

42

I have heard of it but do not consider it important

5

8

11

I consider the term to be a fad

12

15

15

I sometimes try to buy food with low food miles

7

17

17

I actively/ always try to buy food with low food miles

8

6

16

Q.42 Thinking specifically about 'Food Miles', which of the following statements best describes you're attitude towards the term?

Understanding of the Term Food Miles – Spontaneous

76

New question in 2008

TOTAL

2013

% Aware

**FRANCE
2008
(32%)
%**

**FRANCE
2010
(47%)
%**

**FRANCE
2013
(58%)
%**

GENDER

**Male
%**

**Female
%**

AGE

**18-24
%**

**25-34
%**

**35-44
%**

**45+
%**

The distance that food has
to travel from producer to
shop



61



73



78

71

84

83

76

75

78

An indication of
environmental impact



39



21



11

17

7

9

17

15

10

Other -

*



1

1

*

-

1

-

1

Don't know -



19



10

11

9

7

6

10

12

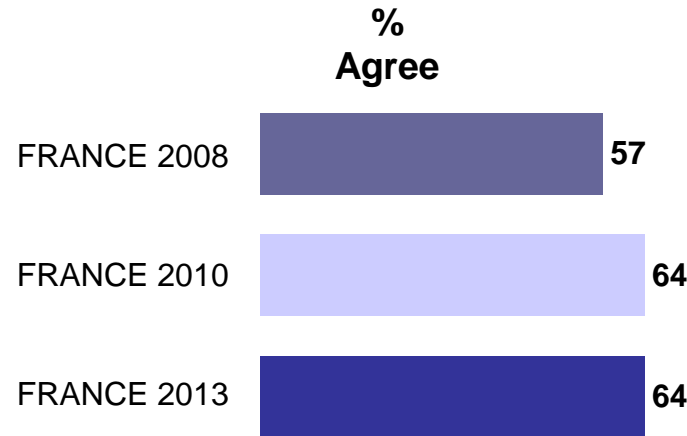
Q.43 What do you understand the term "Food Miles" to mean?

Statements Regarding Environmental Issues (I)

77

New question in 2008

I am more conscious of environmental issues in my choice of products today



In 2013, Higher Amongst:



- Females
- 55 yrs+
- Entertaining at home more often

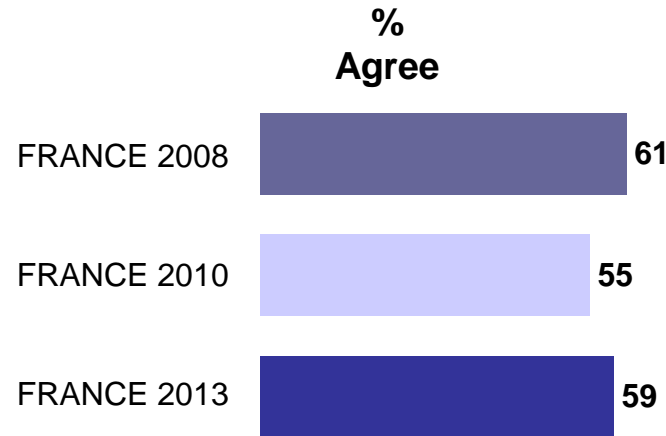
Q.41 Please tell me how strongly you agree or disagree with the following statements?

Statements Regarding Environmental Issues (II)

78

New question in 2008

I prefer to buy from companies that are aware of the impact of environmental issues



In 2013, Higher Amongst:

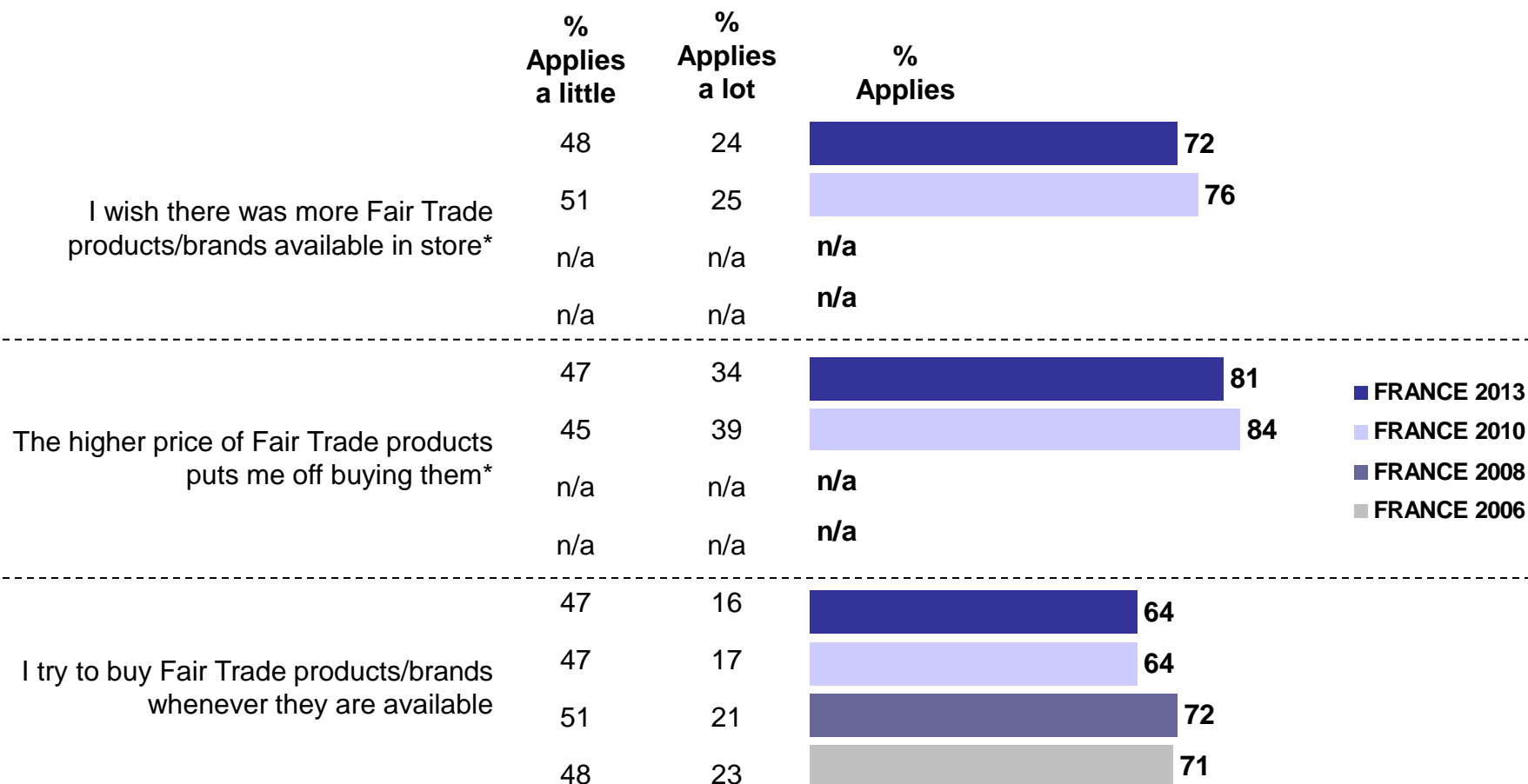


- Females
- 55 yrs+
- Entertaining at home more often

Q.41 Please tell me how strongly you agree or disagree with the following statements?

Attitude Towards Fair Trade Products

79



* New statement added 2010

Q.34 I am going to read out a number of statements people have said about Fair Trade products. I would like you to state whether each statement applies to you personally a lot, a little or not at all.

PERIscope2013



French **Grocery Shopping**

Grocery Shopping: Summary

81

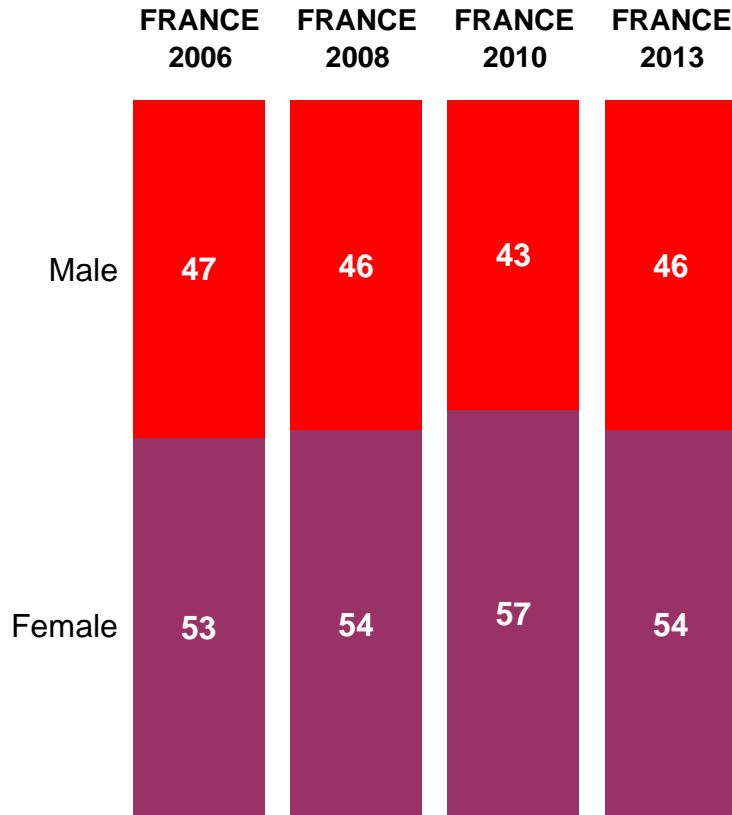
- The profile of grocery shoppers continues to be mainly female. However, the male grocery shopper has affirmed his place in the supermarket.
- When it comes to grocery shopping, French grocery shoppers tend to most often go to the same store but look for the best value for money they can get. The importance placed on the quality of the food that they buy has regained importance since 2008. Now 64% believe that the quality of fresh food is more important than price.
- Grocery shoppers in France do not seem particularly interested in spending time looking for a bargain or comparing prices between outlets to see where they can buy the cheapest fresh food. Buying on impulse is also not a defining characteristic of the French grocery shopper.
- In relation to food shopping, buying in multi-packs remains more popular than smaller packs, though as a buying behaviour, it has steadily declined in popularity since 2008.
- Awareness of functional foods has declined since 2006, mirrored also by a decline in the likelihood to buy functional foods in the future.
- While those checking for the quality symbol have decreased since 2006, it is still reassuring that 3 in 4 still do check. Country of Origin is checked by 83% of adults. The proportion of those always checking has increased by nine percentage points since 2010.
- In France, 21% claim to have ever bought food items via the internet.

Profile of Grocery Shoppers

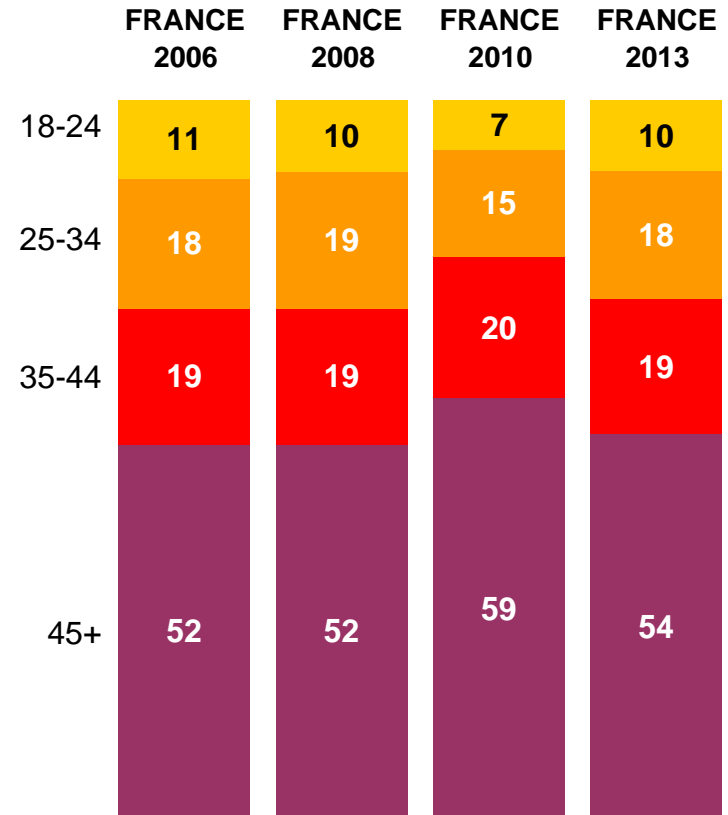
82

%

SEX



AGE

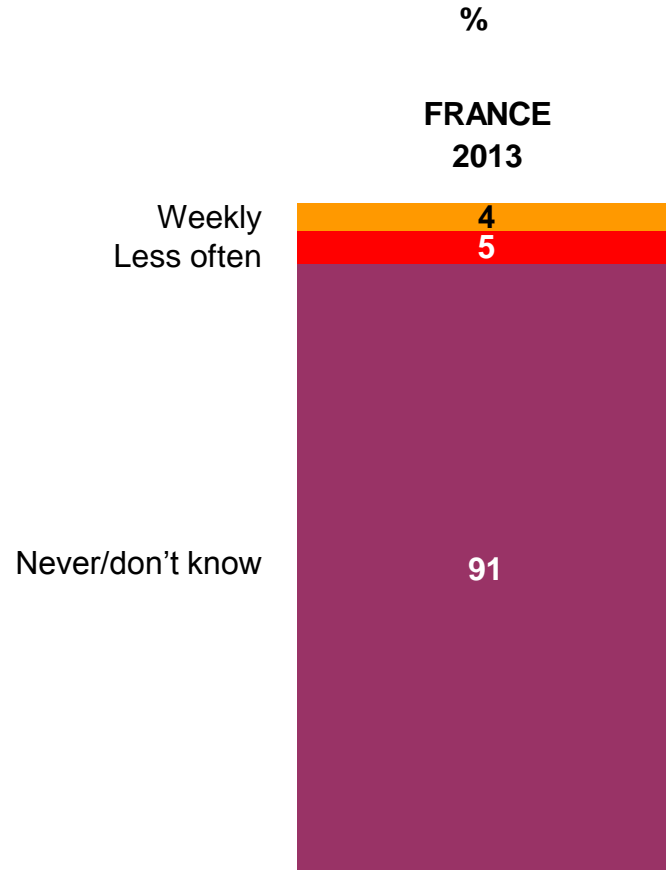


Q.46 Thinking now of shopping for groceries for the household, are you mainly responsible for the grocery shopping, jointly responsible with someone else or is someone else responsible?

Frequency Of Purchasing Wheat (Gluten) Free Food

83

New question in 2013

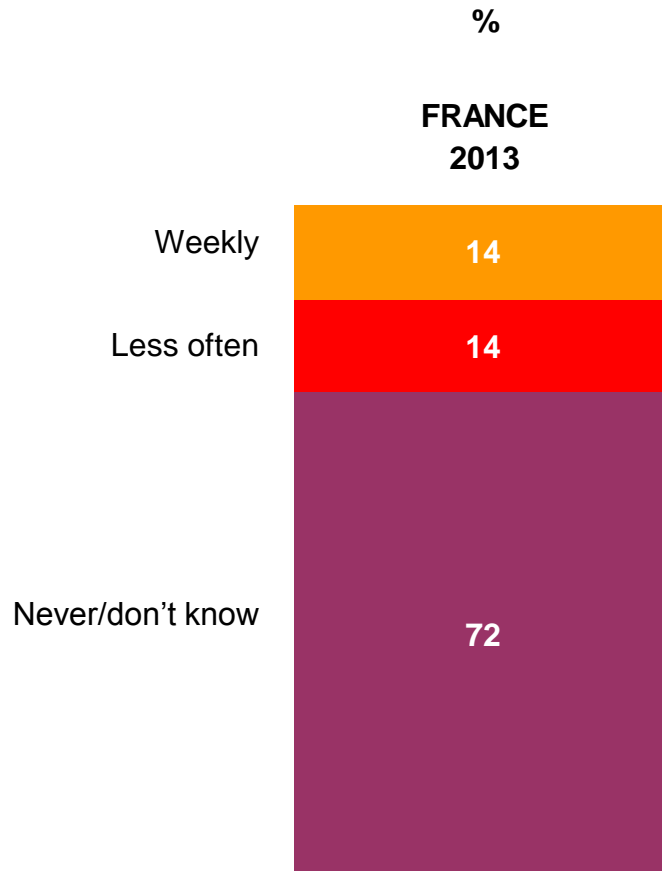


Q.30b And how often, if at all, would you or somebody in your household purchase wheat (gluten) free food?

Frequency Of Purchasing 'Free From' Food

84

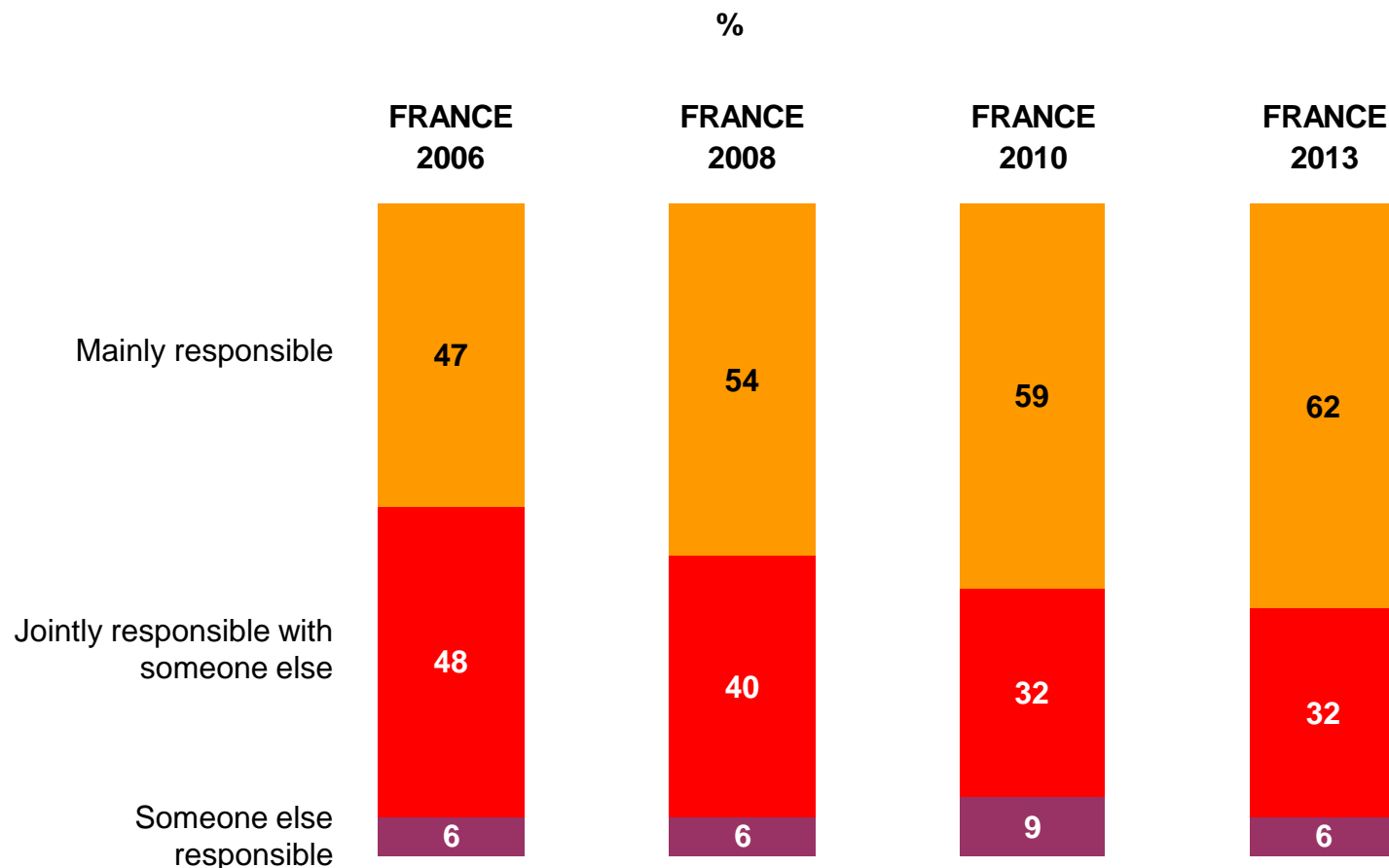
New question in 2013



Q.30c And how often, if at all, would you or somebody in your household purchase food with a 'free from' label (free from food is food that has been designed to exclude one or more ingredients to which people can have intolerances or allergies or who do not wish to consume certain products due to lifestyle choice. These ingredients may include dairy, eggs, nuts and wheat.).

Responsibility for Grocery Shopping

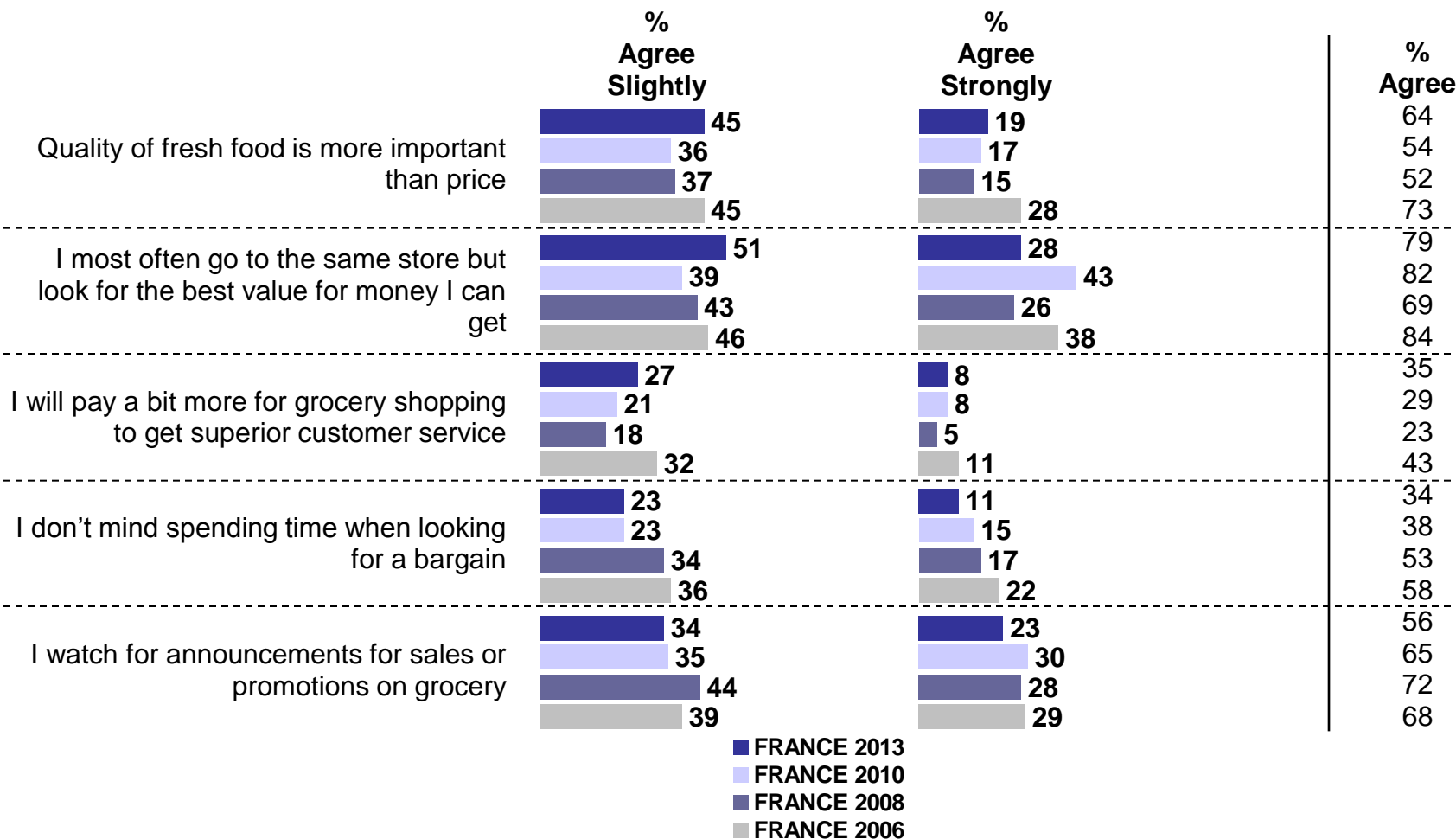
85



Q.46 Thinking now of shopping for groceries for the household, are you mainly responsible for the grocery shopping, jointly responsible with someone else or is someone else responsible?

Attitudes Towards Grocery Shopping (I)

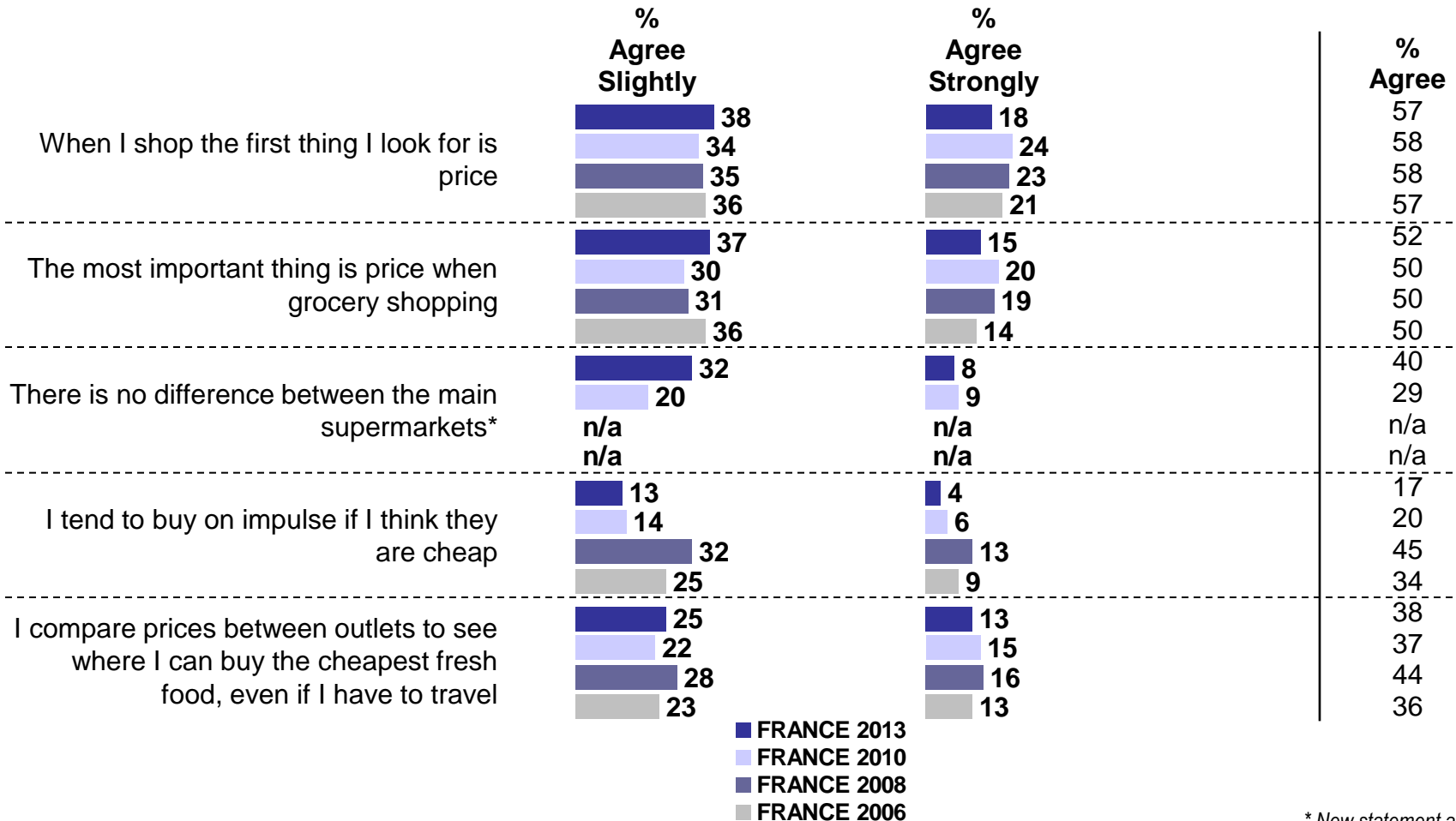
86



Q.47 I am going to read out a list of things that people have said about grocery shopping. Please tell me how much you agree or disagree with each statement.

Attitudes Towards Grocery Shopping (II)

87

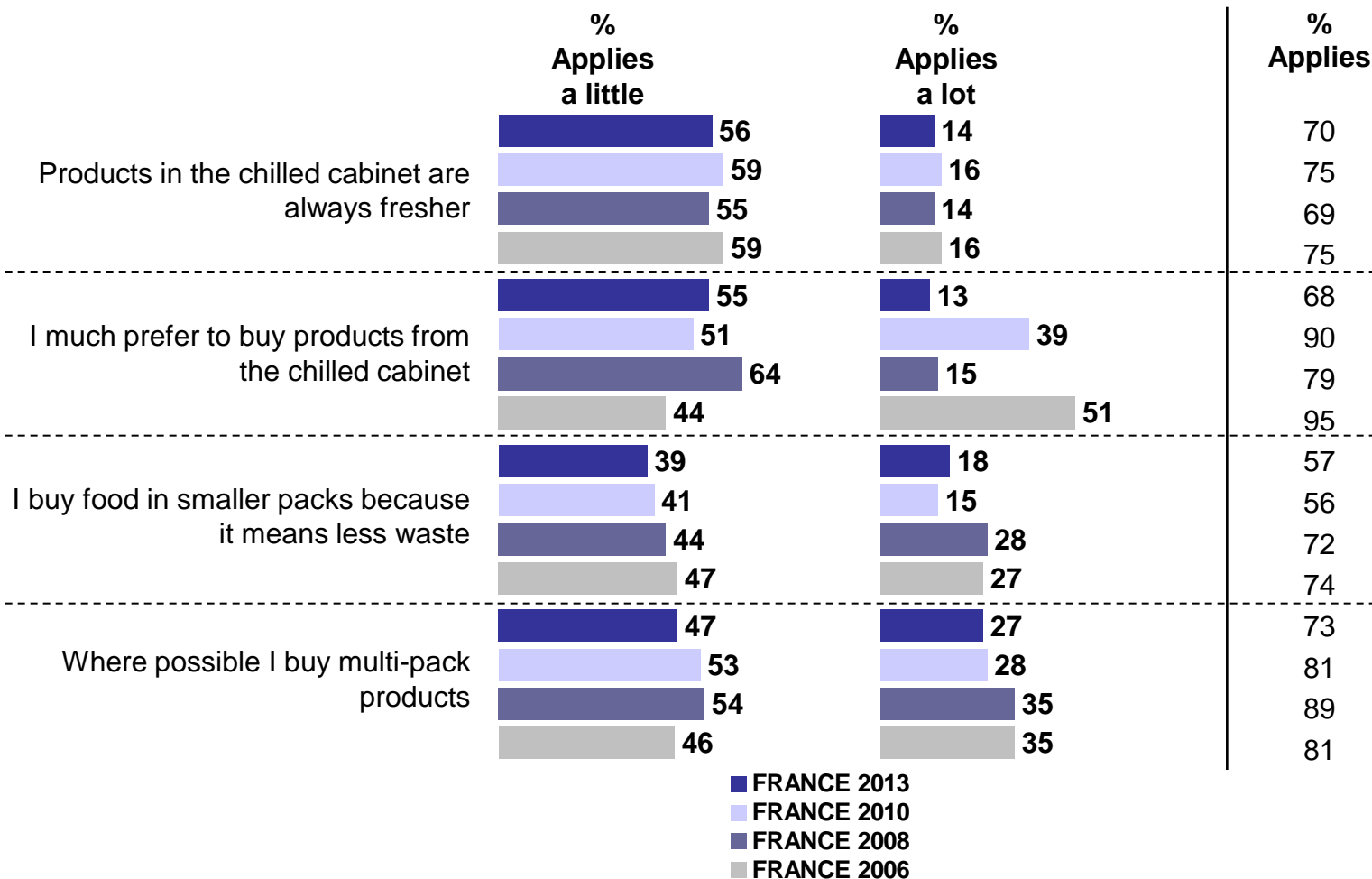


* New statement added in 2010

*Q.47 I am going to read out a list of things that people have said about grocery shopping.
Please tell me how much you agree or disagree with each statement.*

Attitudes Towards Food Shopping

88

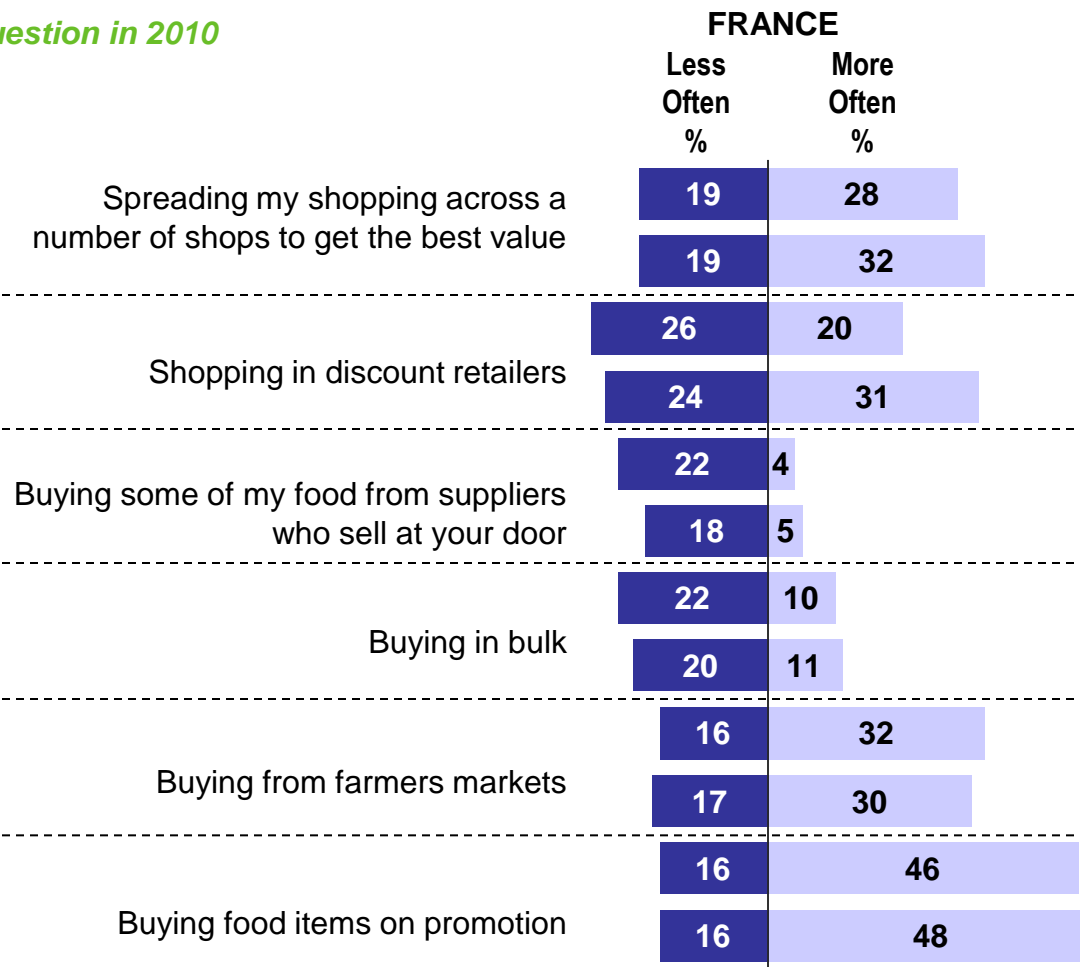




Q.48 And now about food shopping generally – please tell me whether these statements apply to you a lot, a little or not at all?

Recent Change In Food Shopping Habits (I)

89

New question in 2010



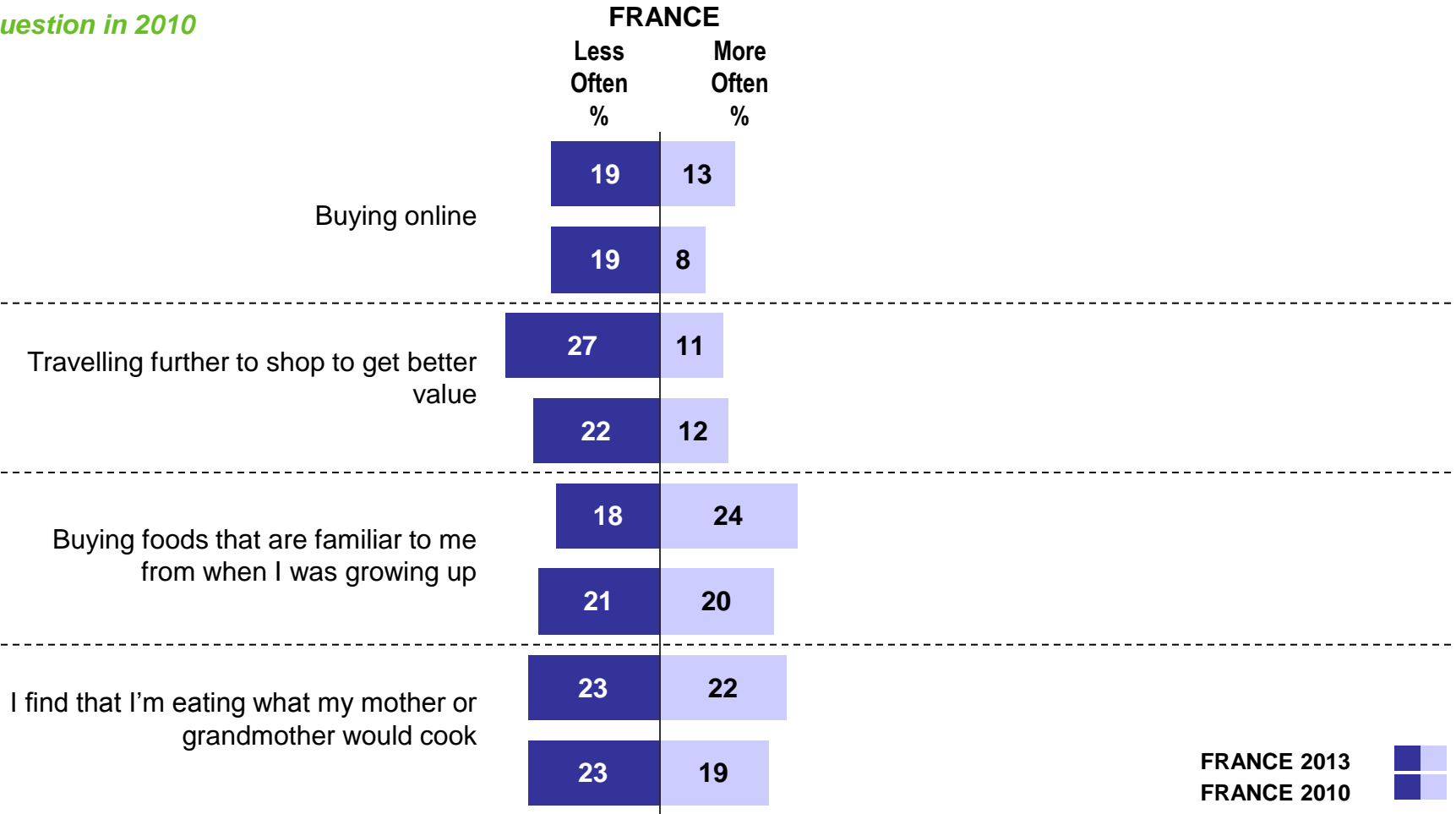
FRANCE 2013 
FRANCE 2010 

Q.40 Thinking about your food shopping lately, have you been doing any of the following more often or less often, or have you made no change?

Recent Change In Food Shopping Habits (II)

90

New question in 2010

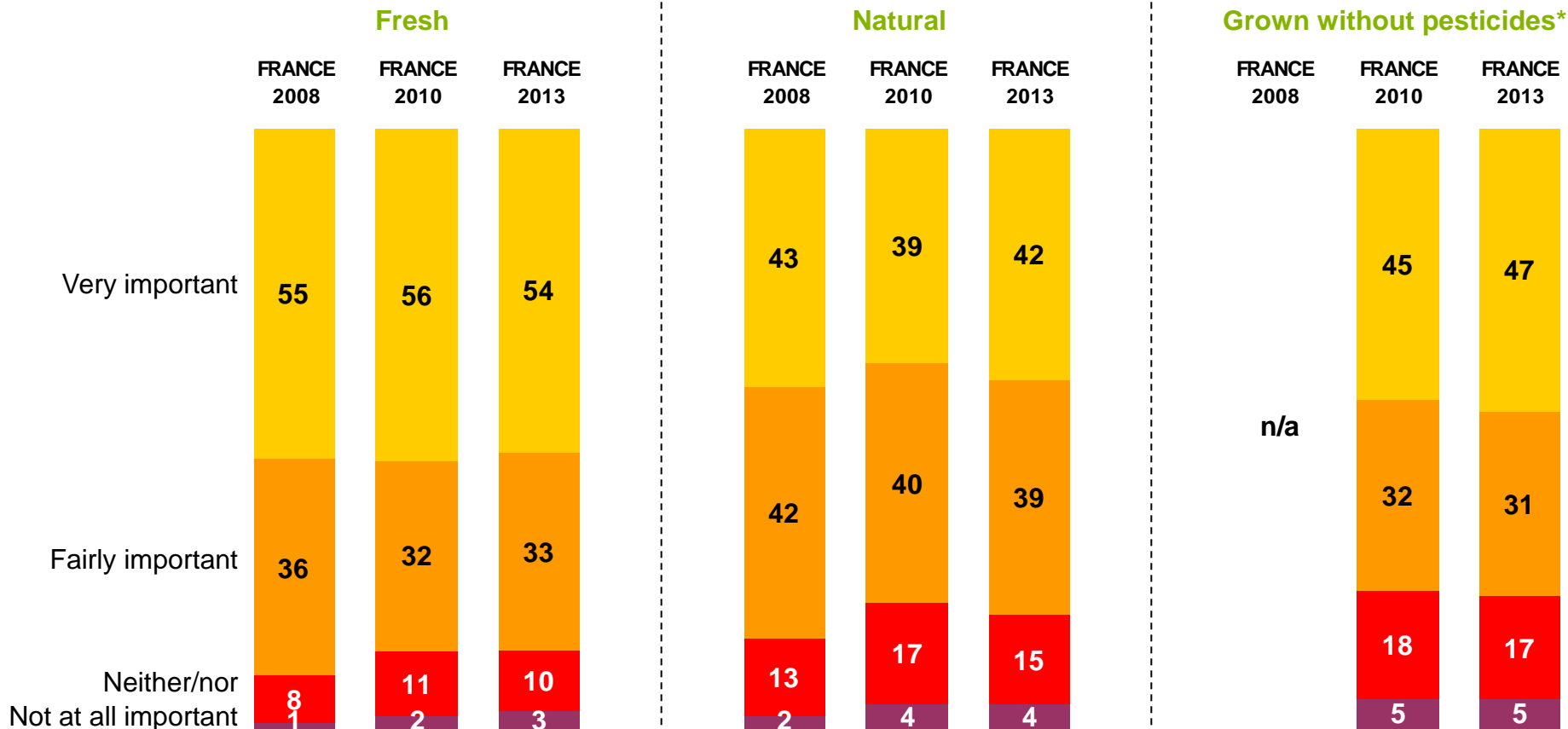


Q.40 Thinking about your food shopping lately, have you been doing any of the following more often or less often, or have you made no change?

Importance of Food Labels when Shopping (I)

91

New question in 2008



* New statement added 2010

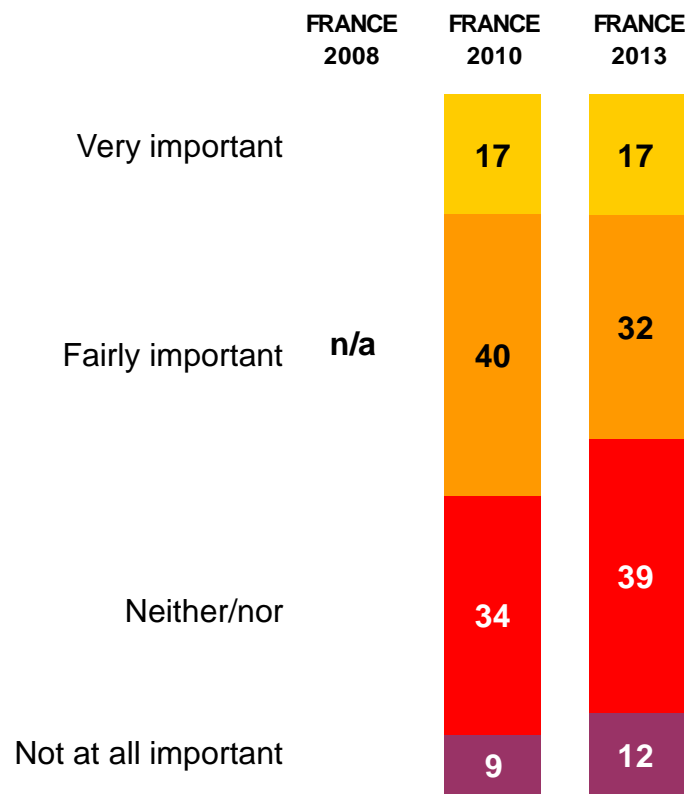
Q.36 When shopping for foods, how important or not are the following statements on labels?

Importance of Food Labels when Shopping (II)

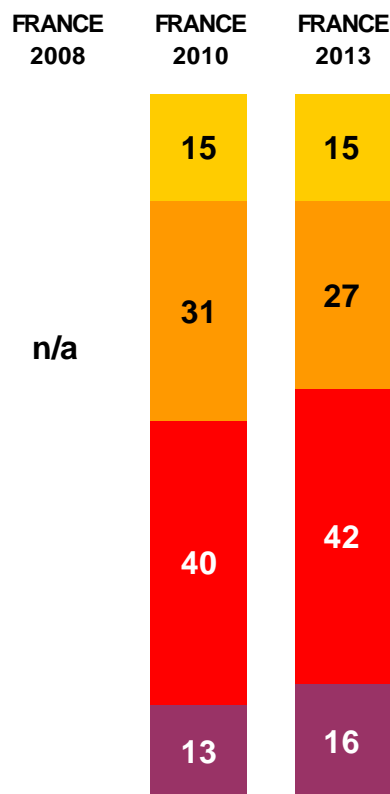
92

New question in 2008

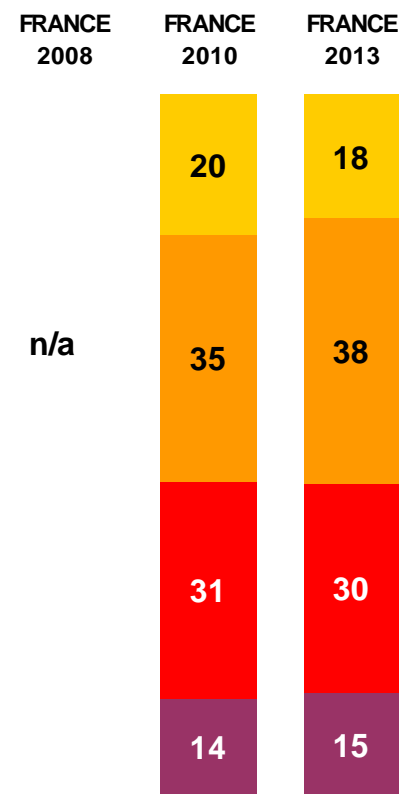
Good source of calcium*



Helps build strong bones*



20% less fat*



* New statement added 2010

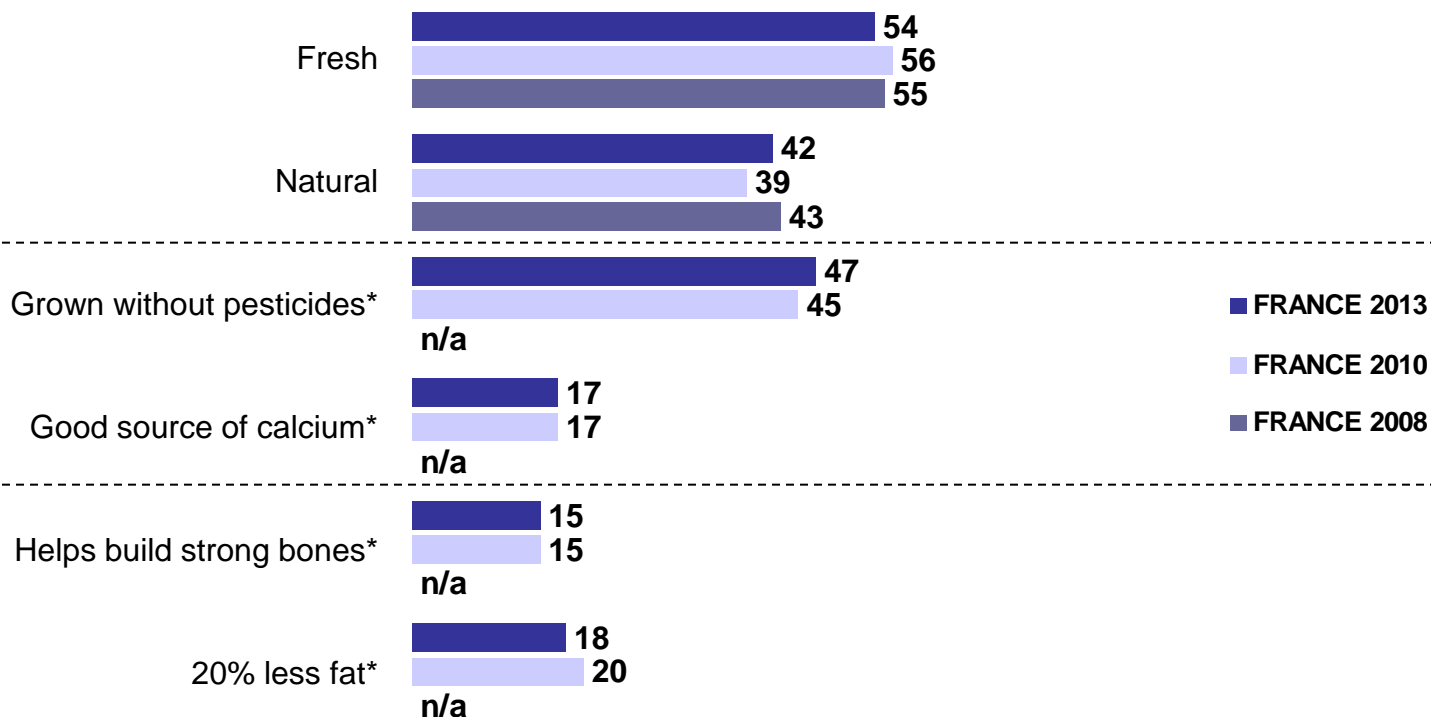
Q.36 When shopping for foods, how important or not are the following statements on labels?

Importance of Food Labels when Shopping

93

New question in 2008

% Very Important

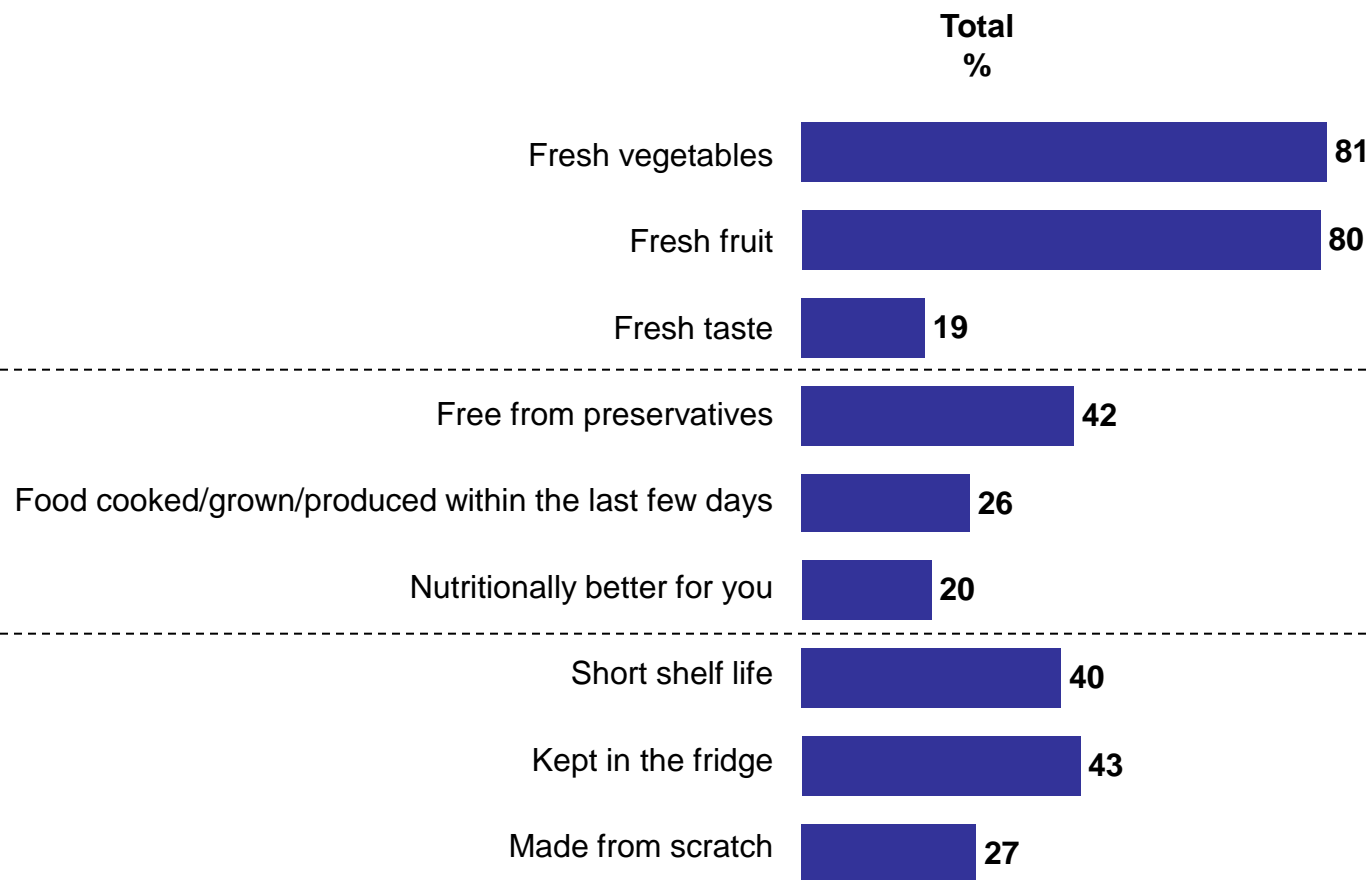


* New statement added 2010

Q.36 When shopping for foods, how important or not are the following statements on labels?

Understanding of the Word “Fresh” – 2013

94

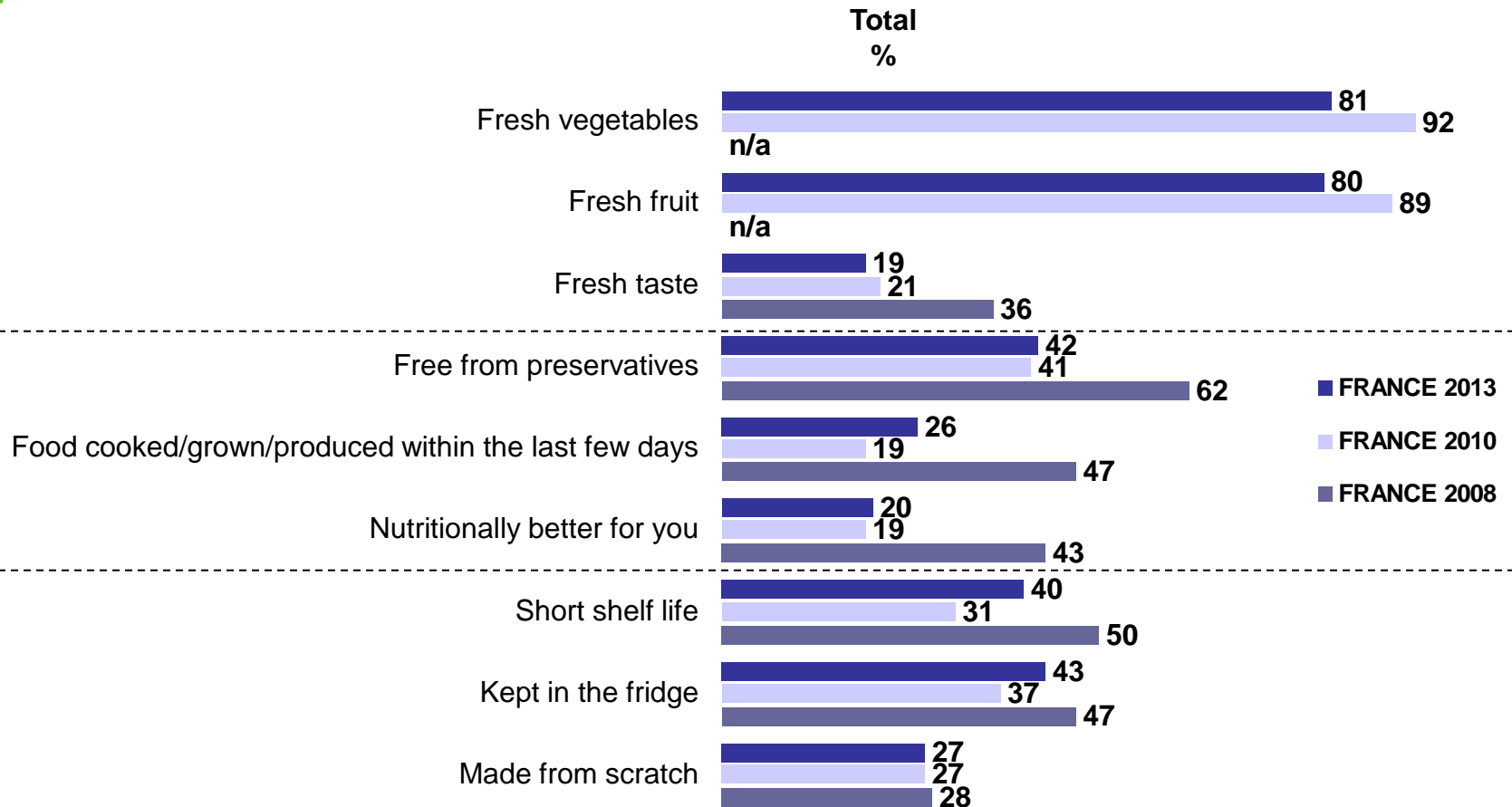


Q.37 And which, if any of the following would you associate with “Fresh” in terms of food?

Understanding of the Word “Fresh”

95

New question in 2008

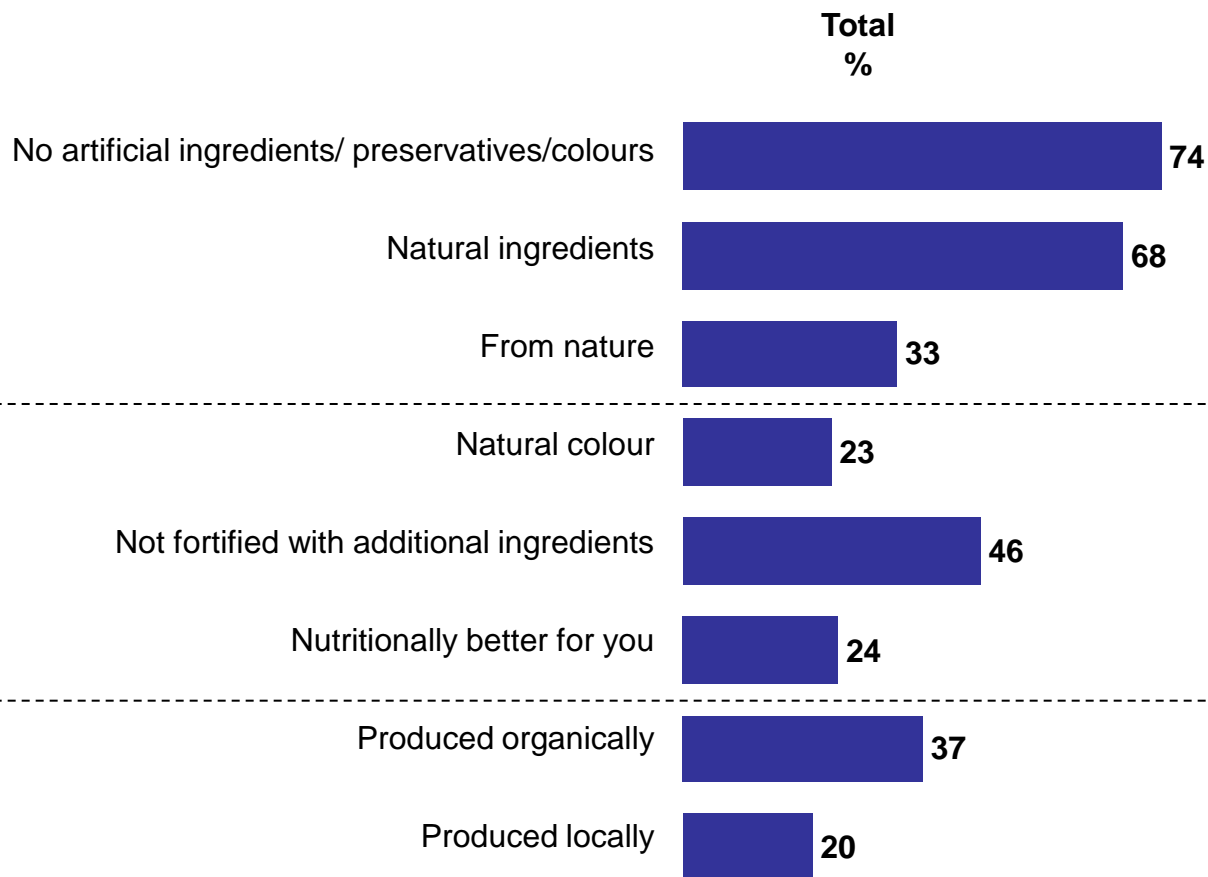


NOTE: Fruit & Veg combined in 2008
NOTE: Question wording different in 2008

Q.37 And which, if any of the following would you associate with “Fresh” in terms of food?

Understanding of the Word “Natural” – 2013

96

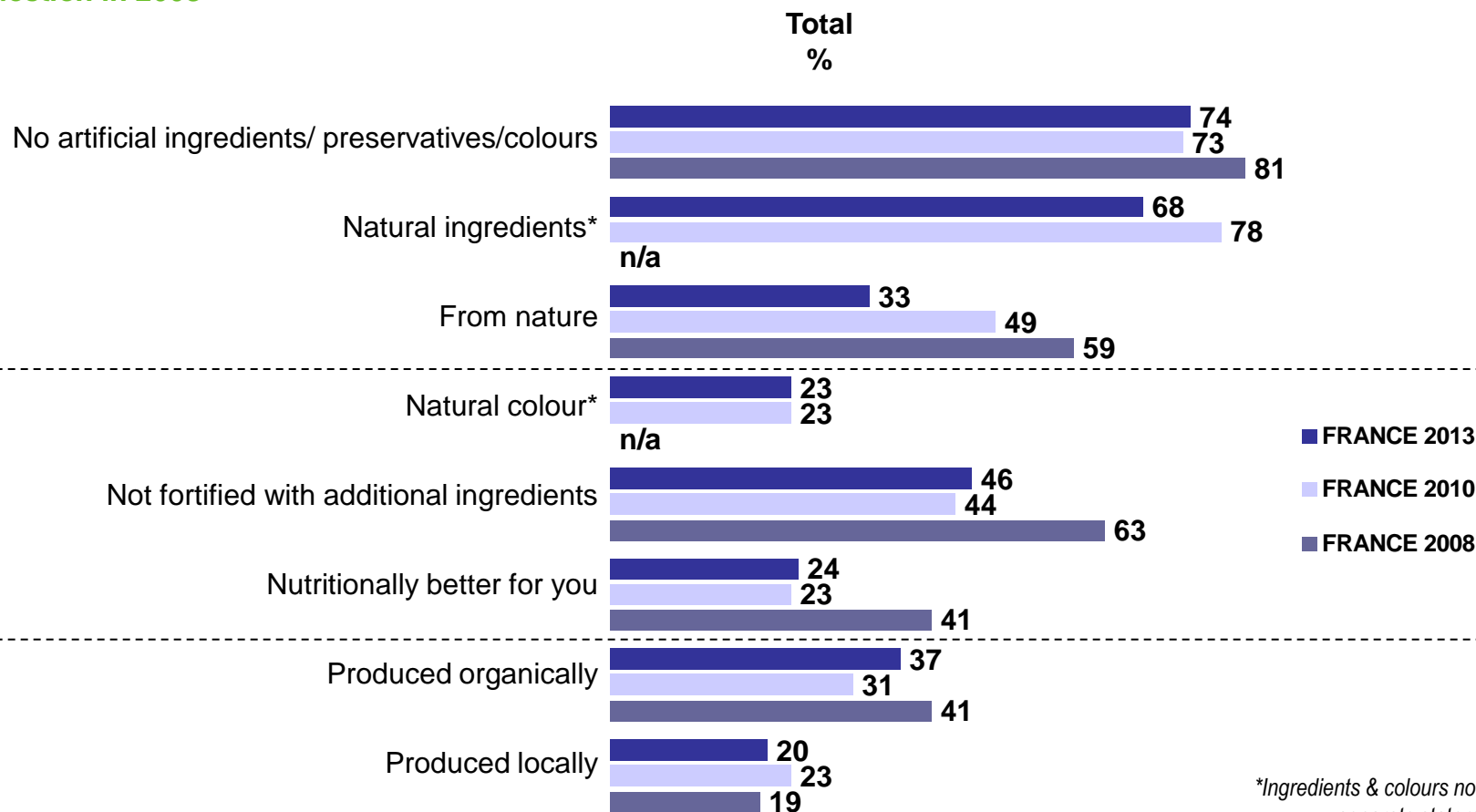


Q.38 Which, if any, of the following would you associate with ‘Natural’ in terms of food?

Understanding of the Word “Natural”

97

New question in 2008



**Ingredients & colours not included as separate statements in 2008*
NOTE: Question wording different in 2008

Q.38 Which, if any, of the following would you associate with 'Natural' in terms of food?

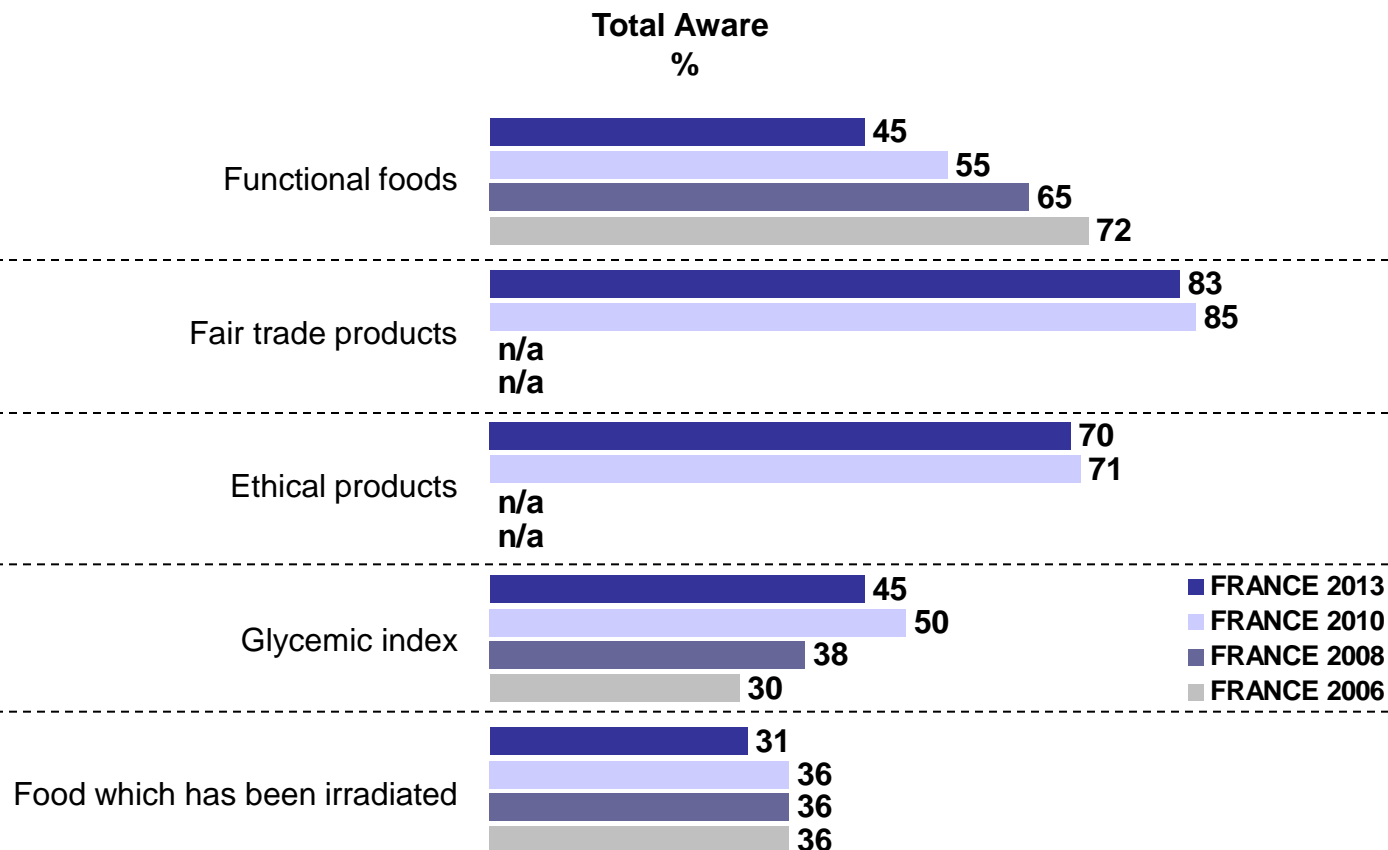
Definition x Different Food Types

98

- **Functional Food**
(i.e. foods that are enriched with active components, e.g. vitamins/soya/omega that offer you health benefits, e.g. healthy heart, reduced cholesterol).
- **Ethical/Fair Trade Products**
(i.e. produce that are sourced through a system which ensures a reasonable return to the producer).
- **Food which has been irradiated**
(i.e. radiation applied to eliminate harmful bacteria).
- **Glycemic Index**
(i.e. a measure of how quickly the body's digestive system breaks down carbohydrates into glucose).
- **Glycemic Load of a Serving of Food**
(i.e. gives the weight of glucose which gives the same glycemic response).

Awareness of Different Food Types

99

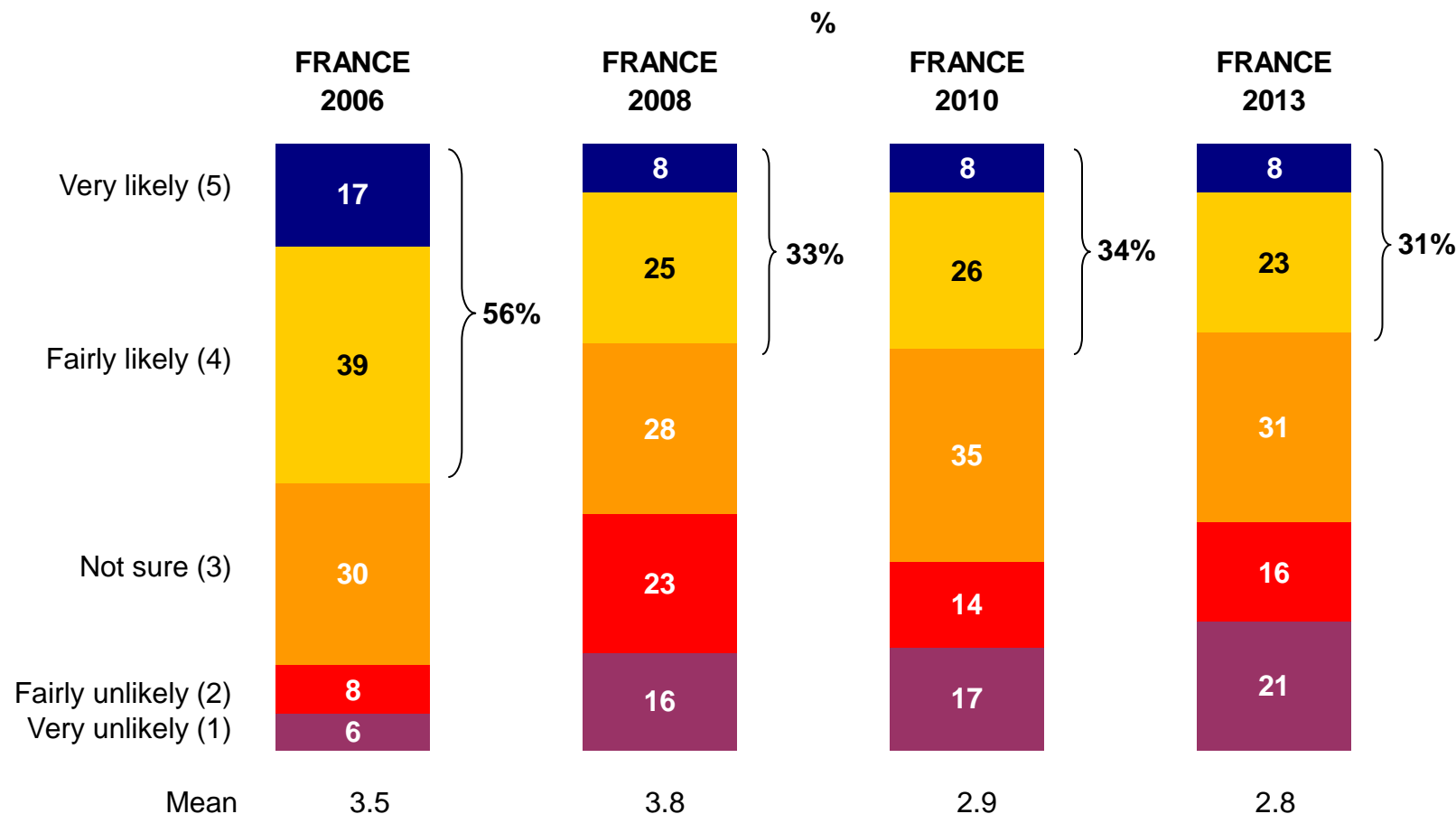


NOTE: Fair Trade / Ethical Products combined in '06 & '08

Q.31 Which of the following have you ever heard of?

Likelihood of Buying Functional Foods in the Future

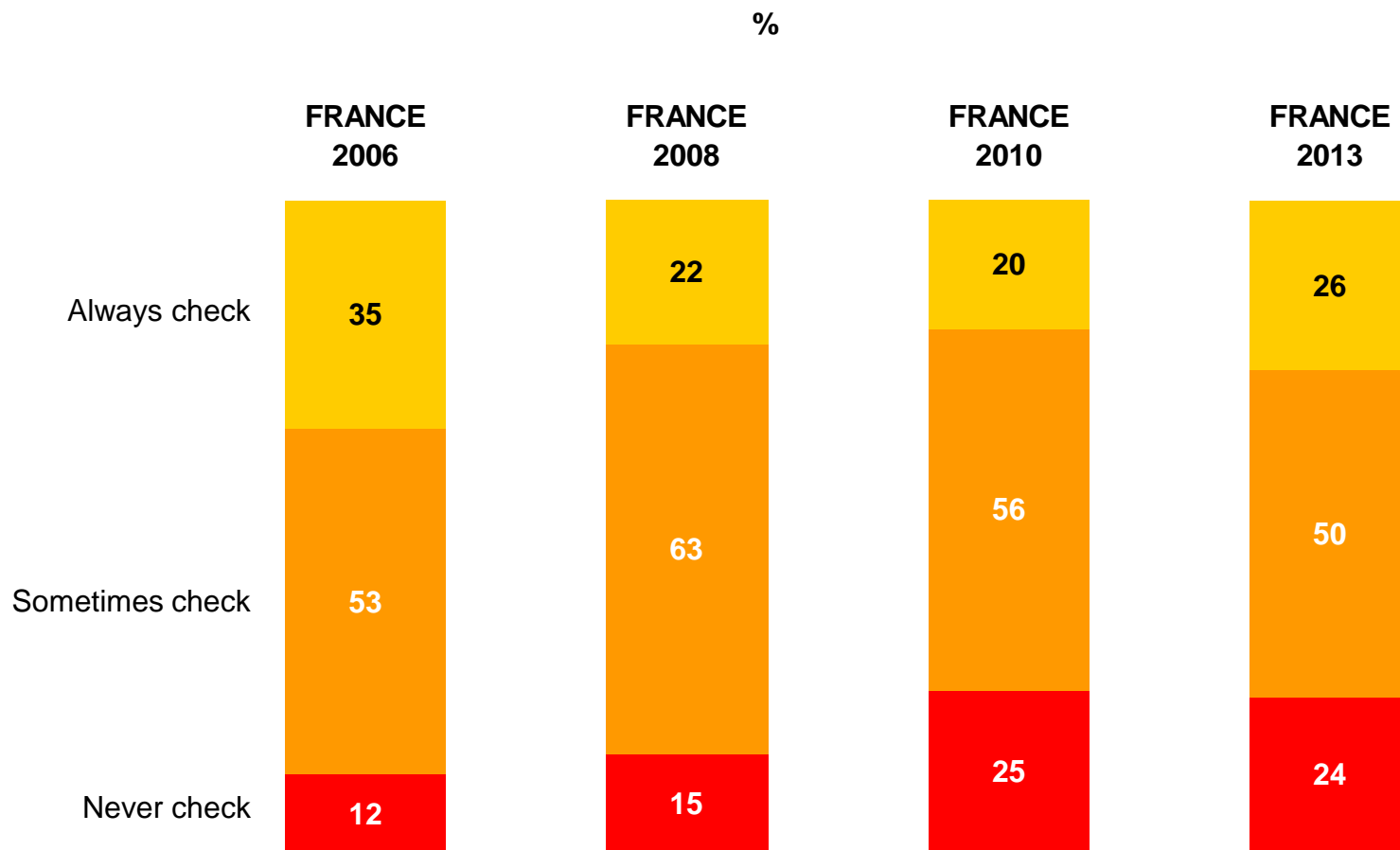
100



Q.35 How likely are you to buy functional foods (i.e. foods that are enriched with active components e.g. vitamins/soya/ omega that offer you health benefits e.g. healthy heart, reduced cholesterol) in the future?

Checking for Symbol of Quality

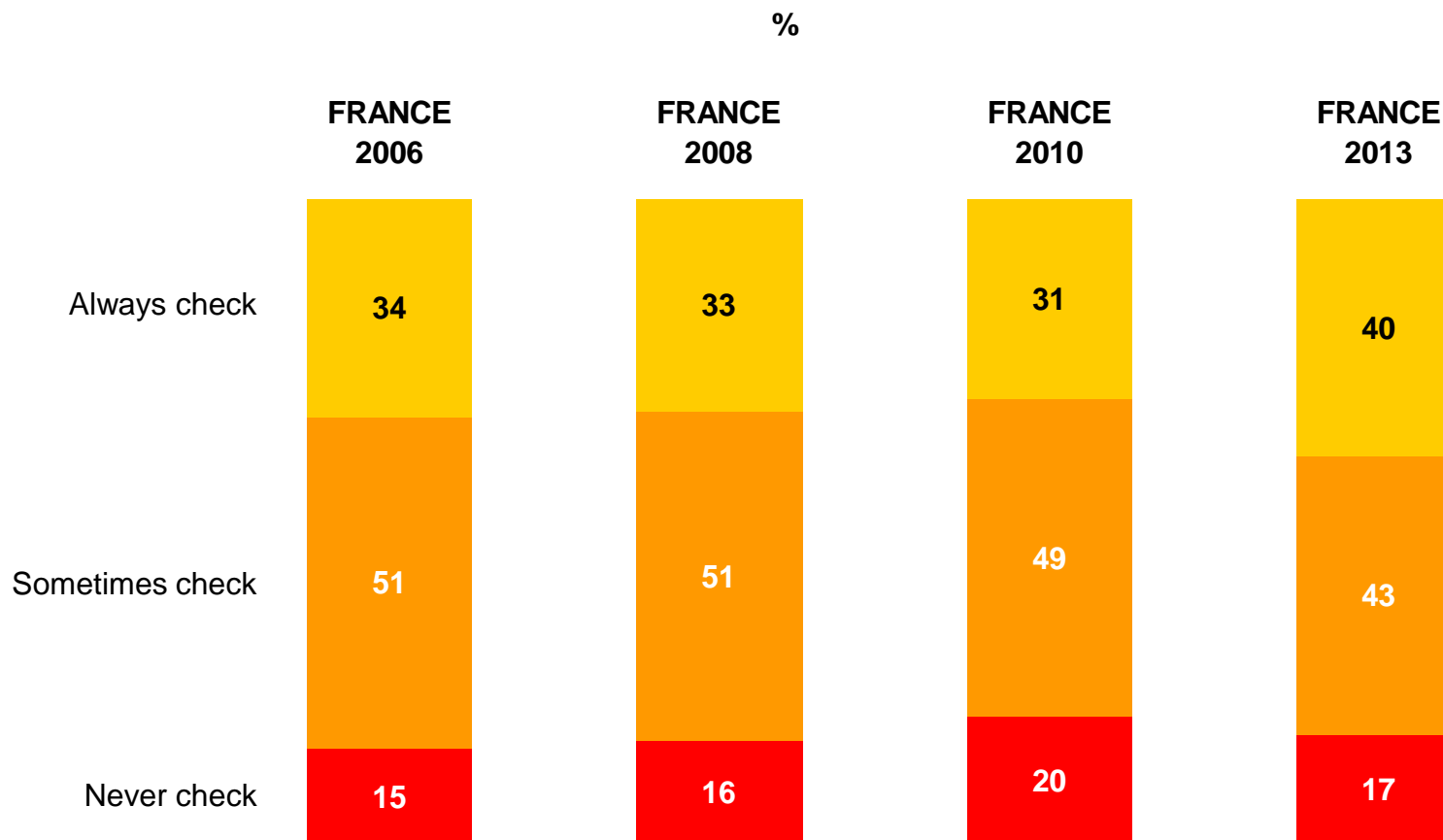
101



Q.39a When you are buying food produce, to what extent do you check for a symbol or certificate that guarantees the quality of the produce?

Checking for Country of Origin

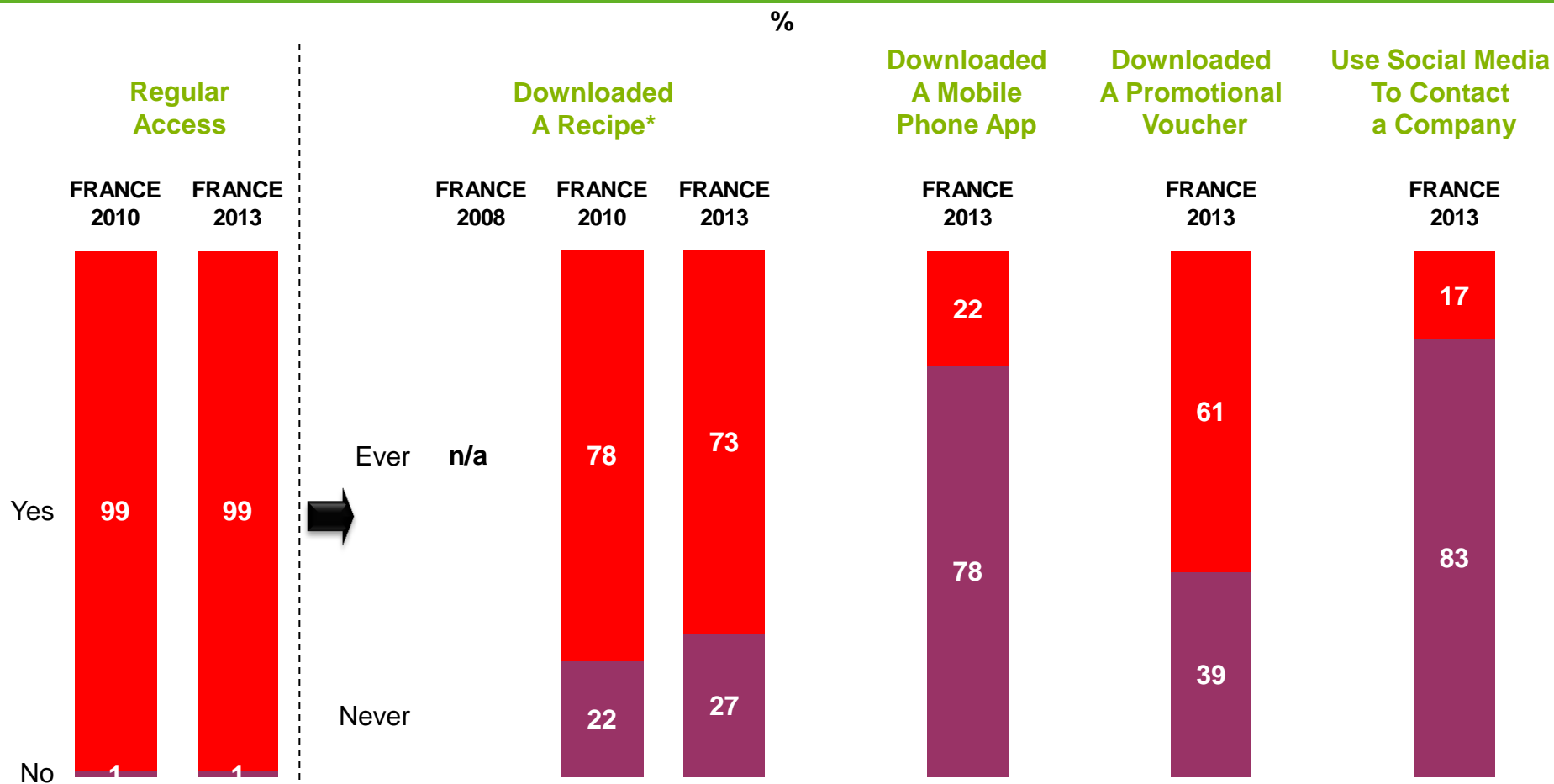
102



Q.39b And to what extent do you check for country of origin, i.e. what country the food was produced in?

Internet Usage

103



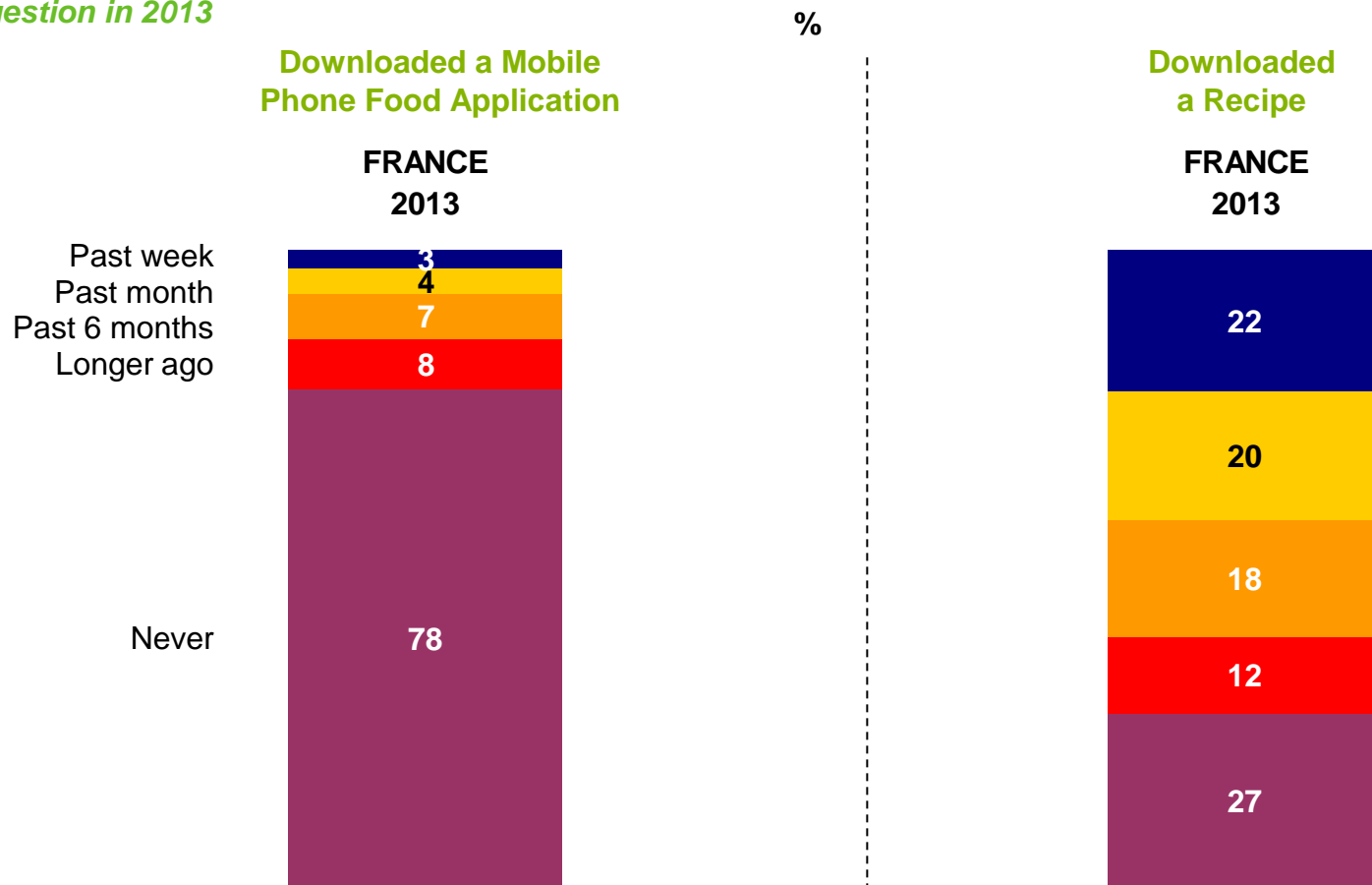
*Change in wording in 2013

Q.50 Do you have regular access, either at home, or at work to the internet?
Q.51 When did you last do any of the following on the internet ...?

Frequency of Downloading / Using Internet – 2013 (I)

104

New question in 2013

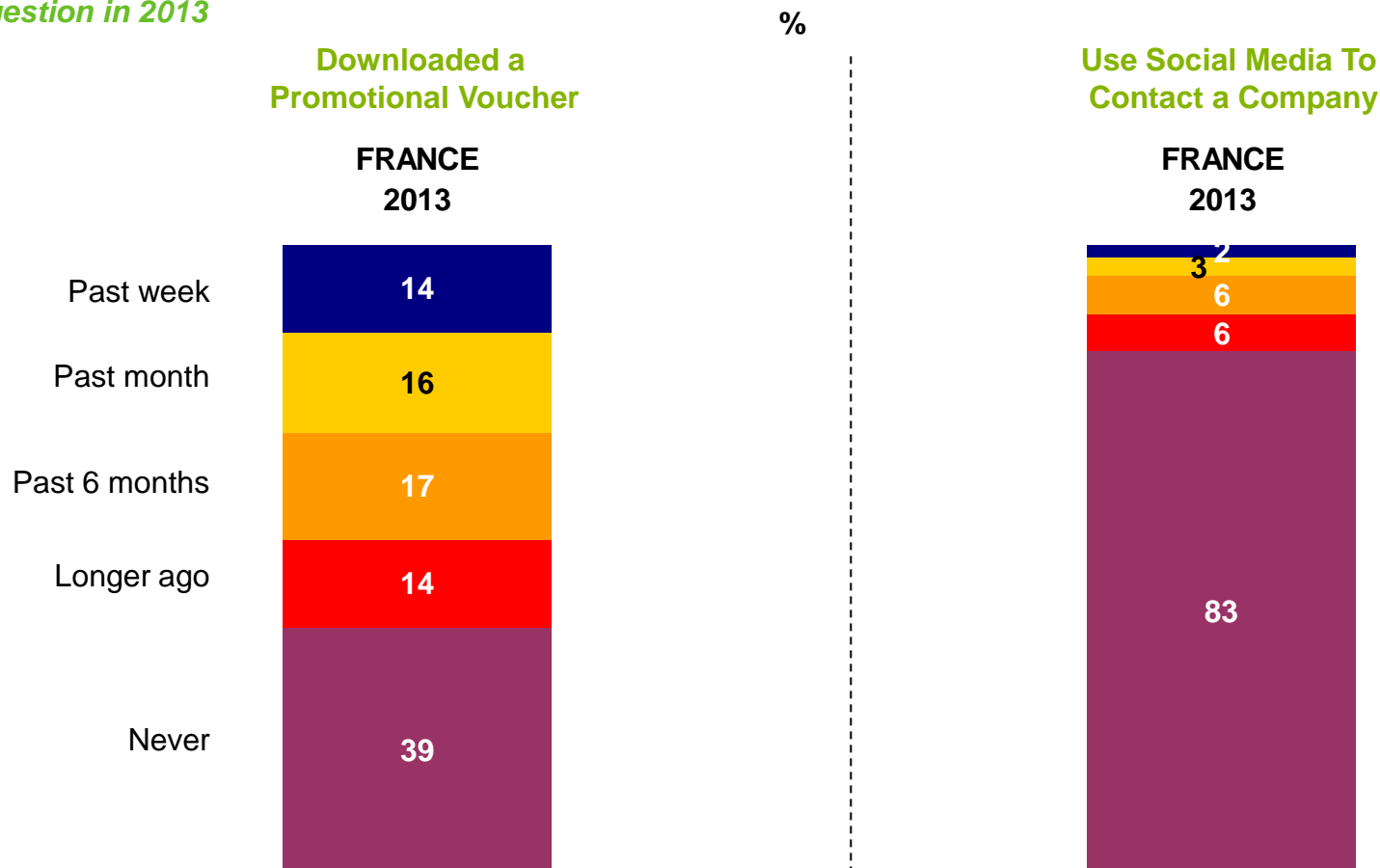


Q.51 In terms of the statements on this card, when did you last do any of the following over the internet?

Frequency of Downloading / Using Internet – 2013 (II)

105

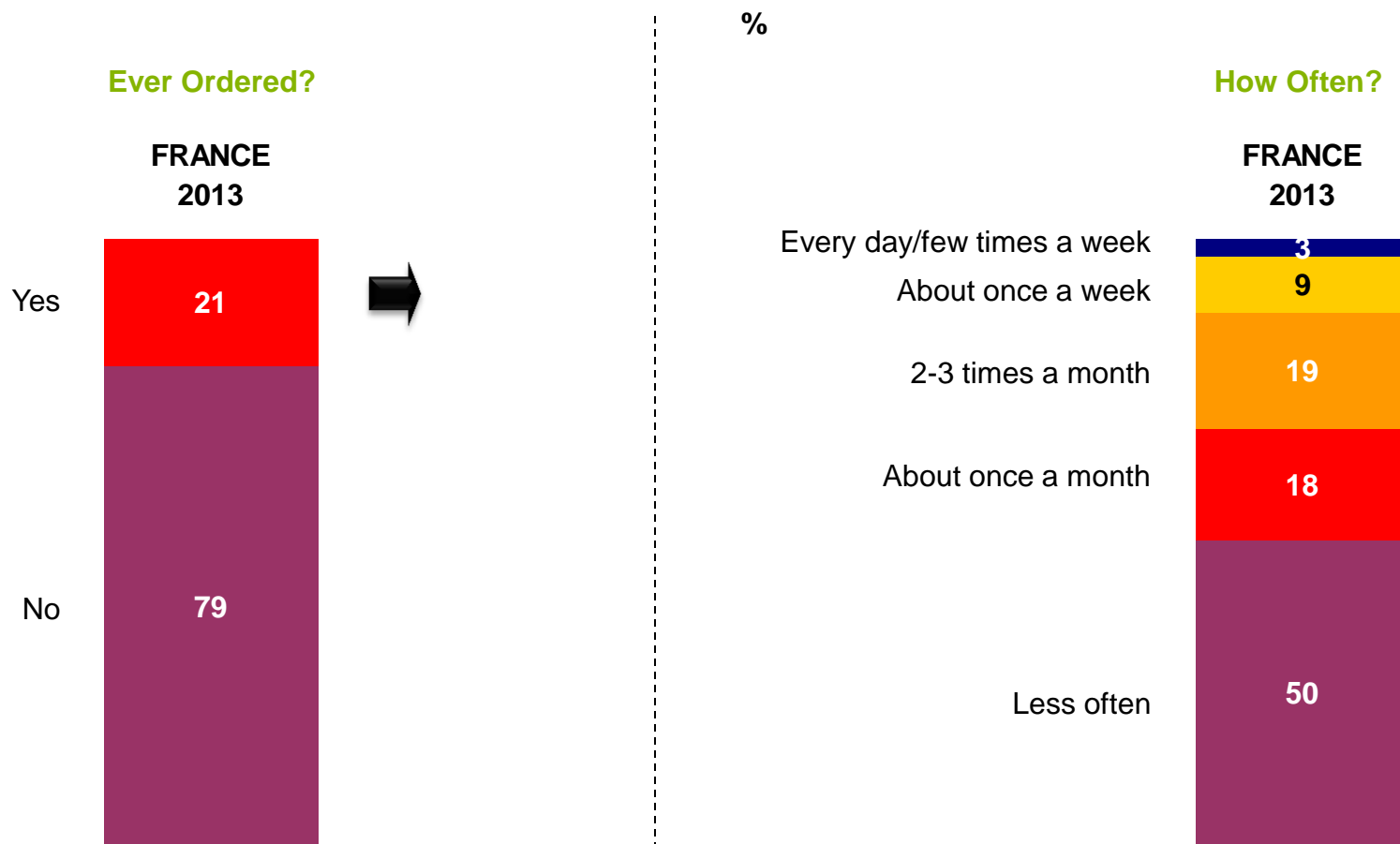
New question in 2013



Q. 51 In terms of the statements on this card, when did you last do any of the following over the internet?

Online Grocery Shopping

106



Q.52 Have you ever ordered your grocery shopping online on the internet?

Q.53 How often do you purchase groceries online?

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French Buying Local

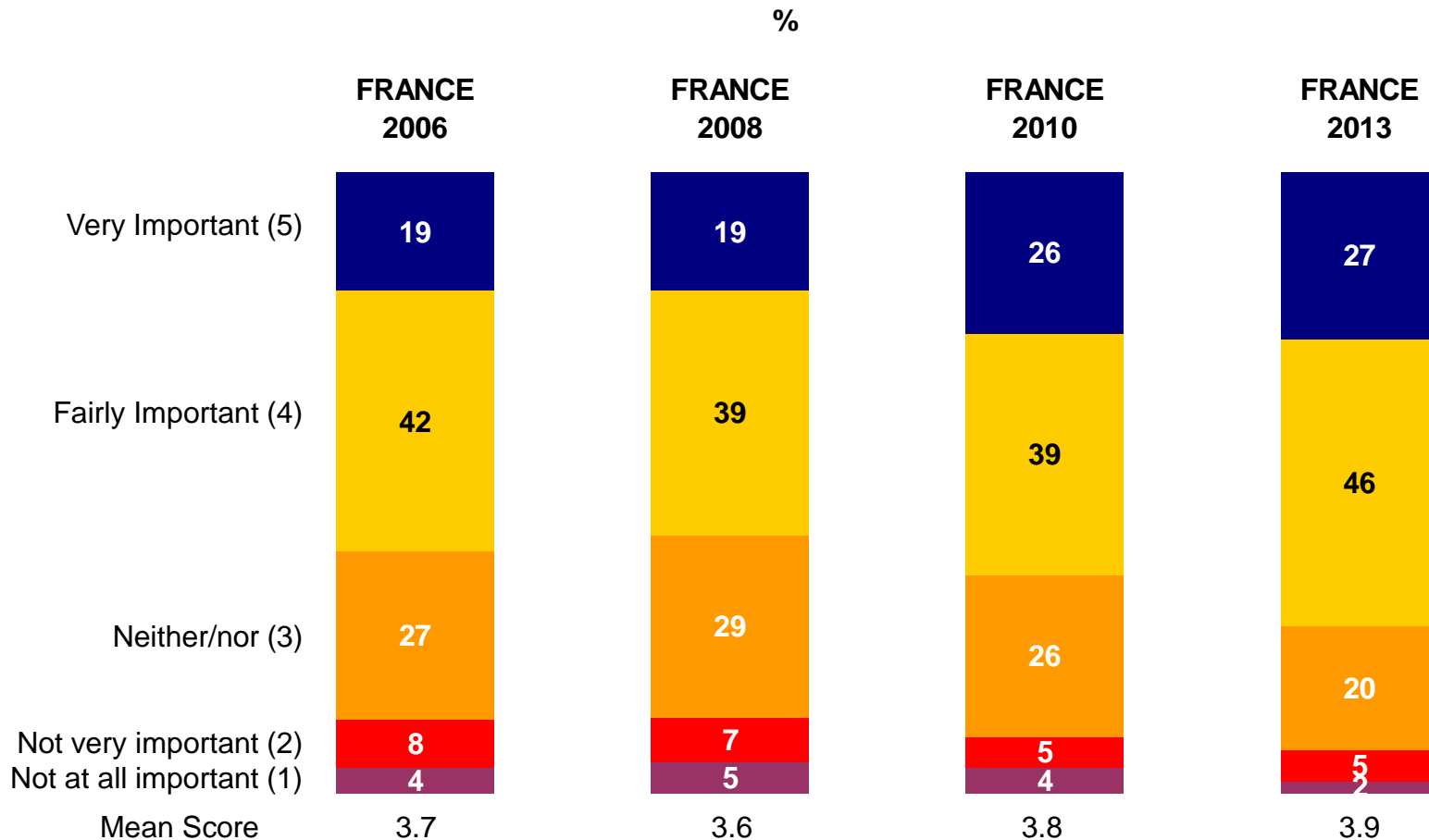
Buying Local: Summary

108

- The importance of buying local produce when shopping for food has gained momentum in France with three quarters of all adults claiming that the local label is very/ fairly important to them when purchasing food.
- French consumers' understanding of what the term 'local' actually means is that it refers to either to food that is available from a farmer's market or food that has been made within a 20 miles radius of where they live.

Importance of Buying Local Produce when Food Shopping

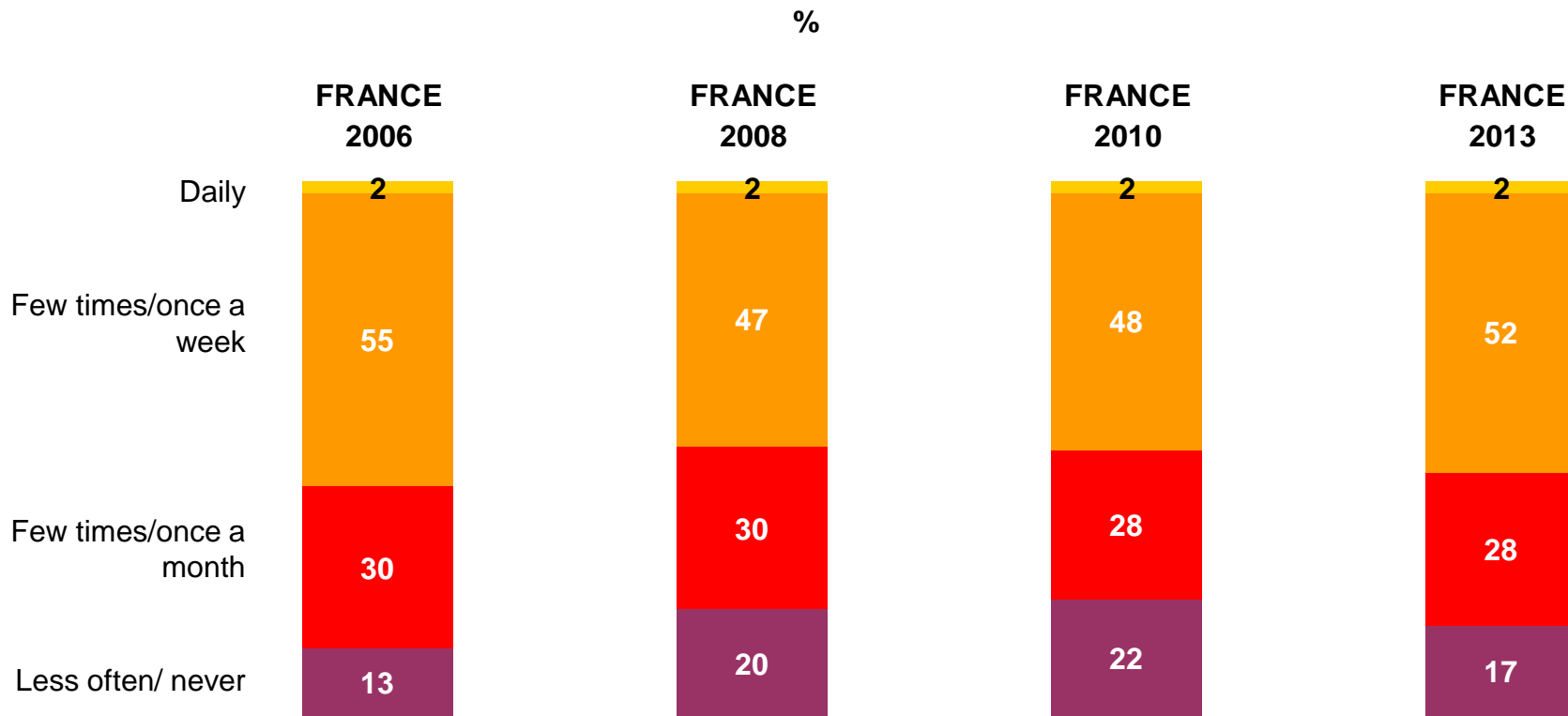
109



Q.26 How important or not is buying local produce i.e. products produced in your local area, to you when purchasing food?

Frequency of Purchasing Local Produce

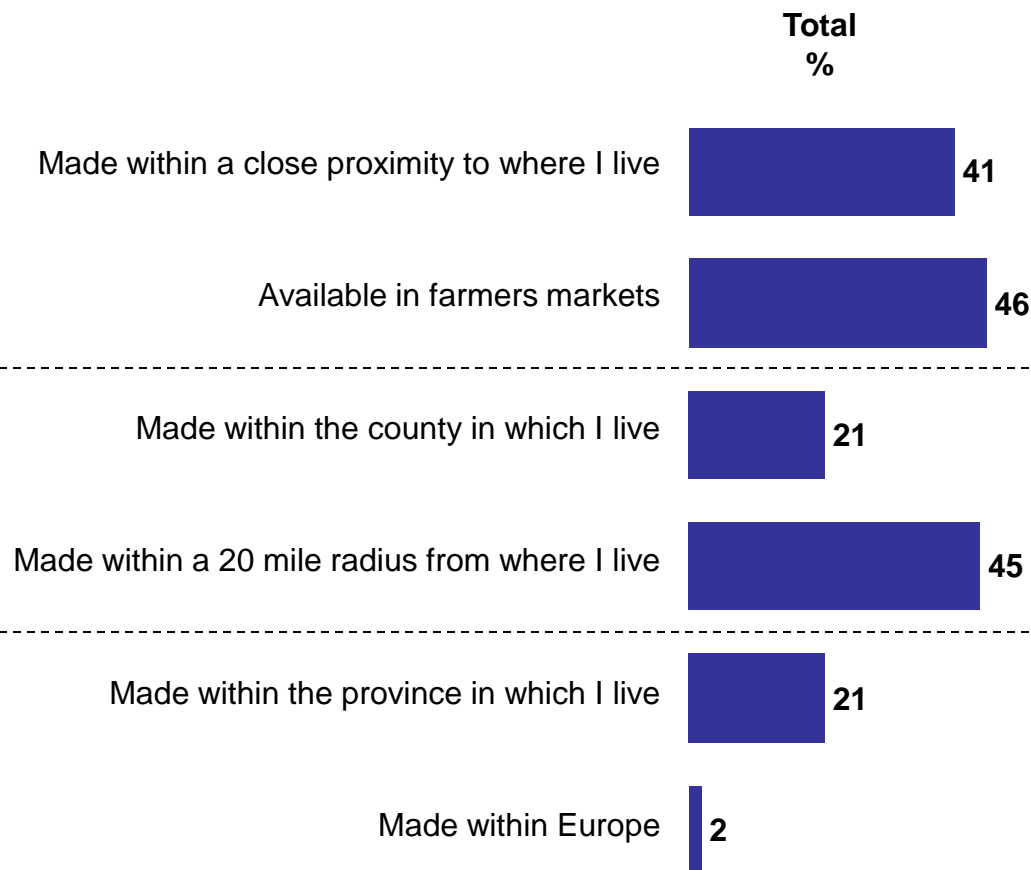
110



Q.28 How often would you buy local produce, i.e. products produced in your local area?

Understanding of the Term “Local Food” – 2013

111

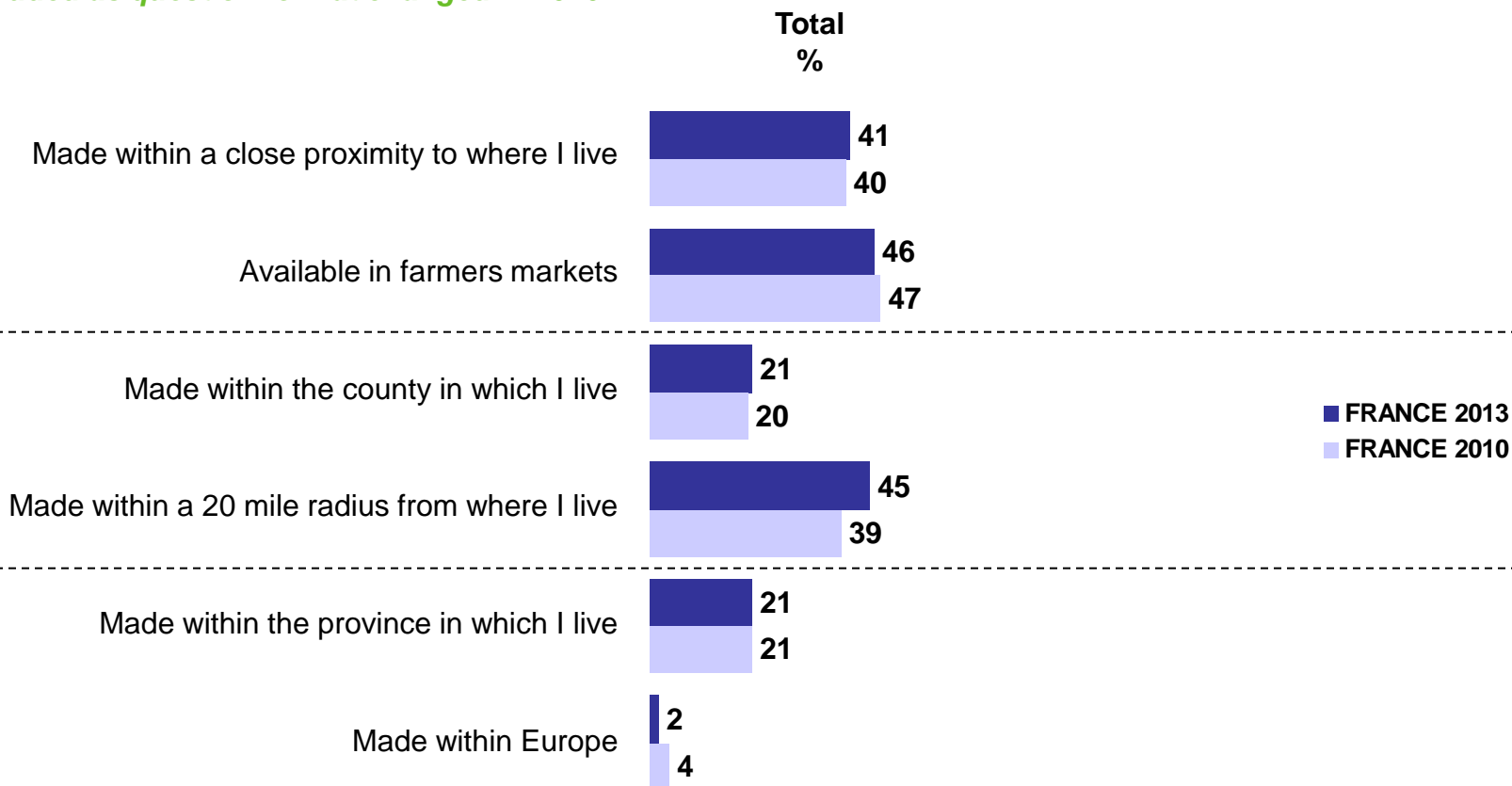


Q.27 Which of the following statements best describes your perception of the term ‘local food’?

Understanding of the Term “Local Food”

112

2008 not included as question format changed in 2010



Q.27 Which of the following statements best describes your perception of the term ‘local food’?

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French

Alcohol

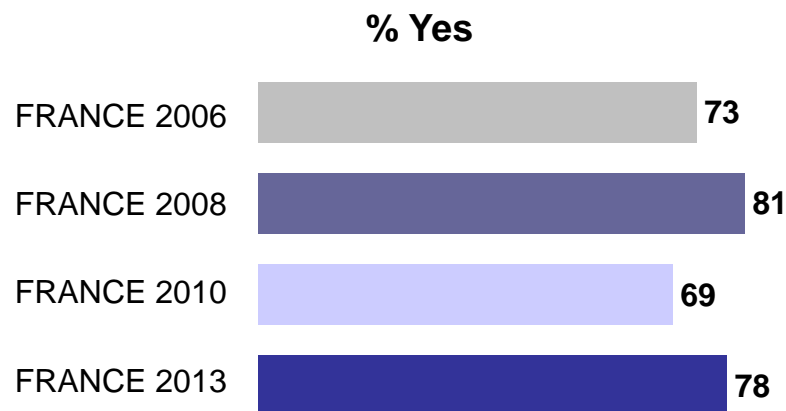
Alcohol: Summary

114

- Just under 8 in 10 adults in France consume alcohol nowadays. This figure has risen since 2010 when consumption was at 69%. Overall consumption has returned to 2008 levels.
- Of those consuming alcohol, the majority do so either daily or weekly.
- The percentage of people drinking alcohol on the majority of their meal occasions has declined since 2008. However, having alcohol with food remains extremely popular with 58% claiming to drink alcohol on more than 60% of their meal occasions.

Incidence of Drinking Alcohol

115



Yes



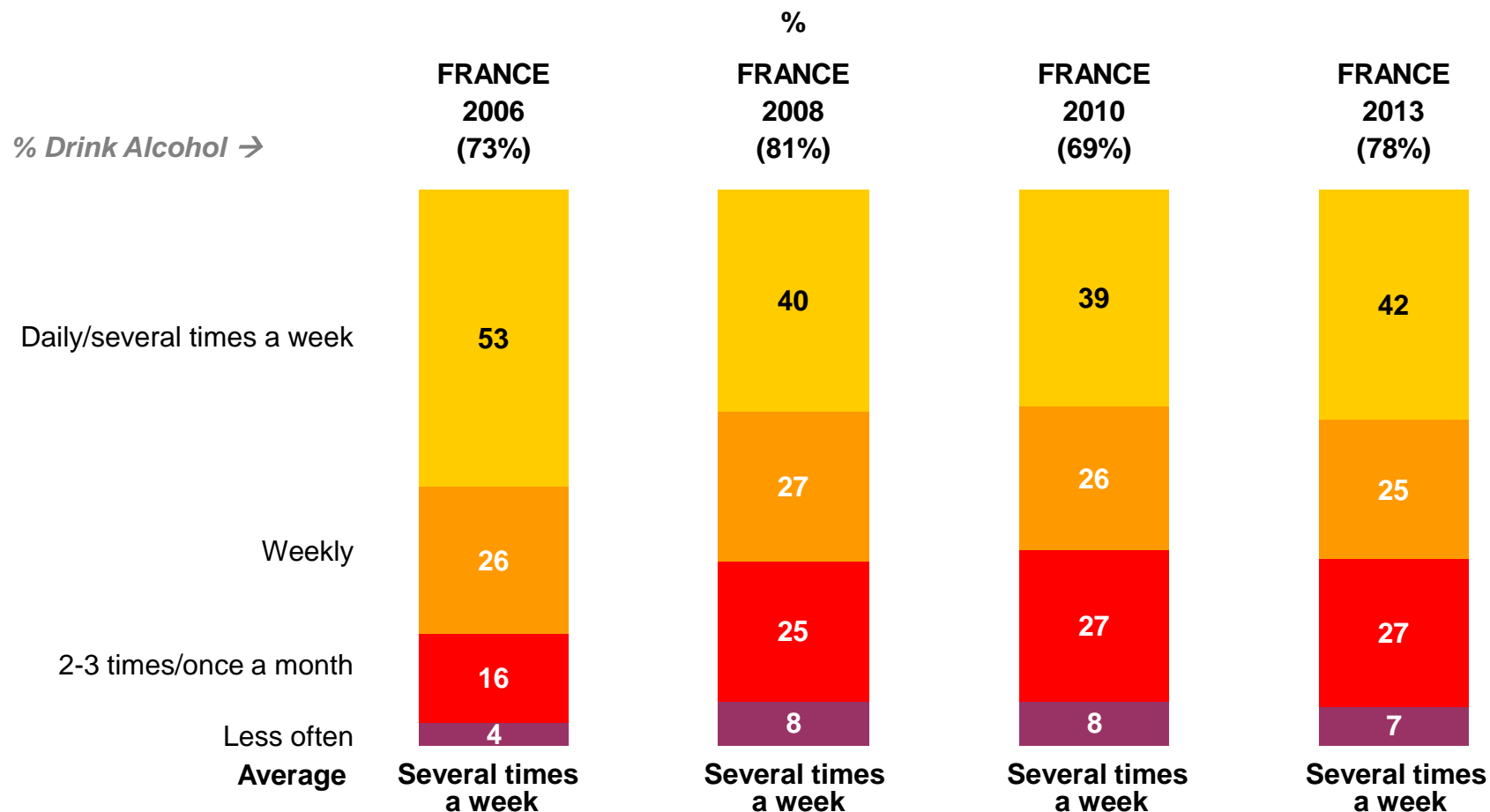
In 2013, Higher Amongst ...

- Males
- 18-34 yrs
- Entertaining at home more often

Q.20 Do you, yourself ever drink any alcoholic drinks, either at home (i.e. in your own home or someone else's home) or on licensed premises such as a pub, club, bar, hotel or elsewhere?

Frequency of Drinking Any Alcohol

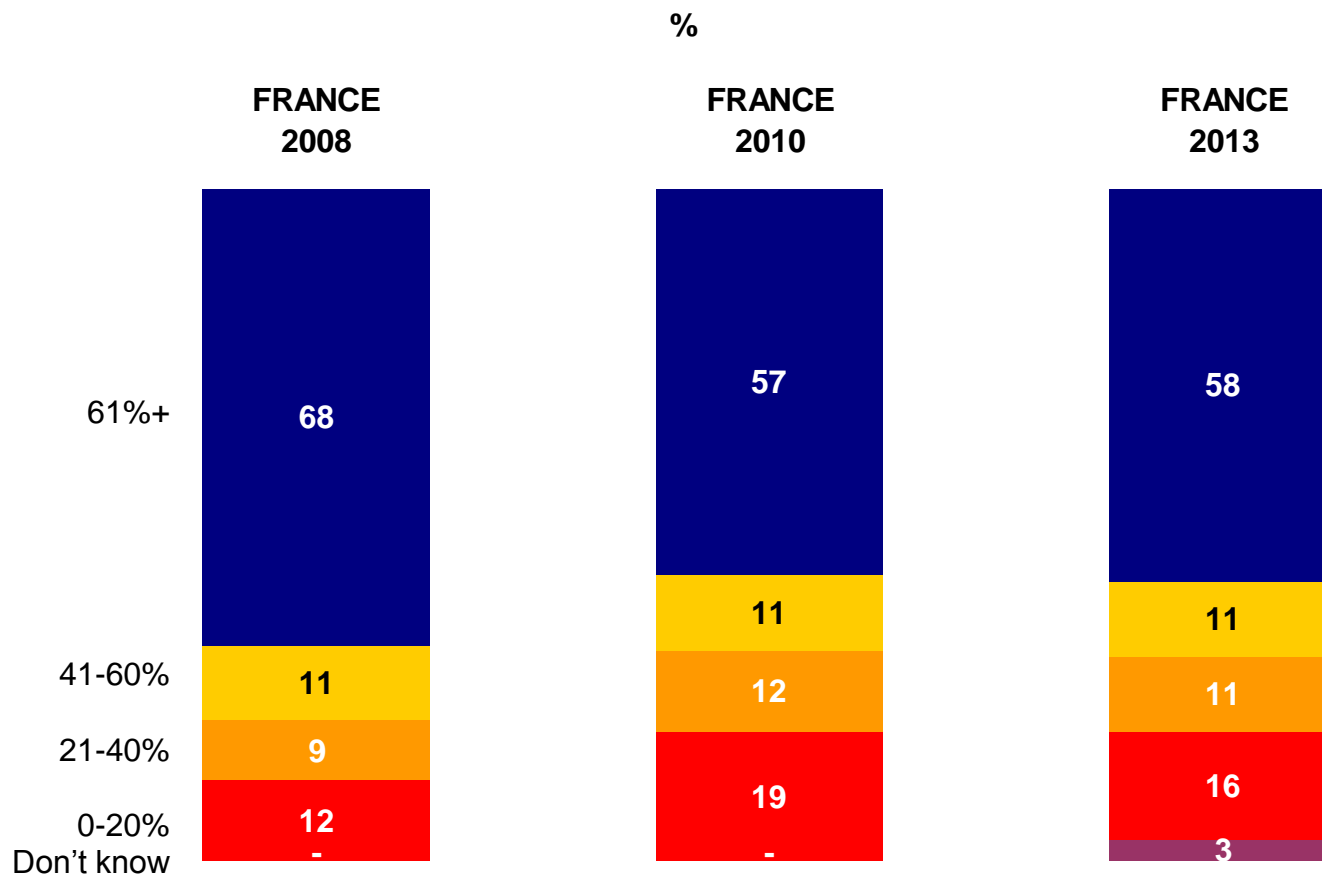
116



Q.21 About how often do you have an alcoholic drink either at home or in someone else's home or on licensed premises such as a pub, bar, club, hotel etc.?

Proportion of Alcohol Consumed with Food

117



Q.22 In an average month, thinking of all the occasions you consume alcohol, approximately what proportion of the occasions of drinking alcohol is with food?

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French

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