

PERIscope2013



Consumers & Their Food An Insight into 10 Markets



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

Introduction

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- PERIscope 2013 explores consumer behaviours & attitudes towards food, shopping and cooking.
- 1,000 interviews across ten countries (10,000+ interviews in total).
- Survey covers topics such as: Eating at home, attitudes towards cooking, local food, sustainability, the environment, grocery shopping and health & wellbeing.
- Research carried out by Ipsos MRBI.
 - *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).*
- For further information or queries please visit www.bordbia.ie or email info@bordbia.ie

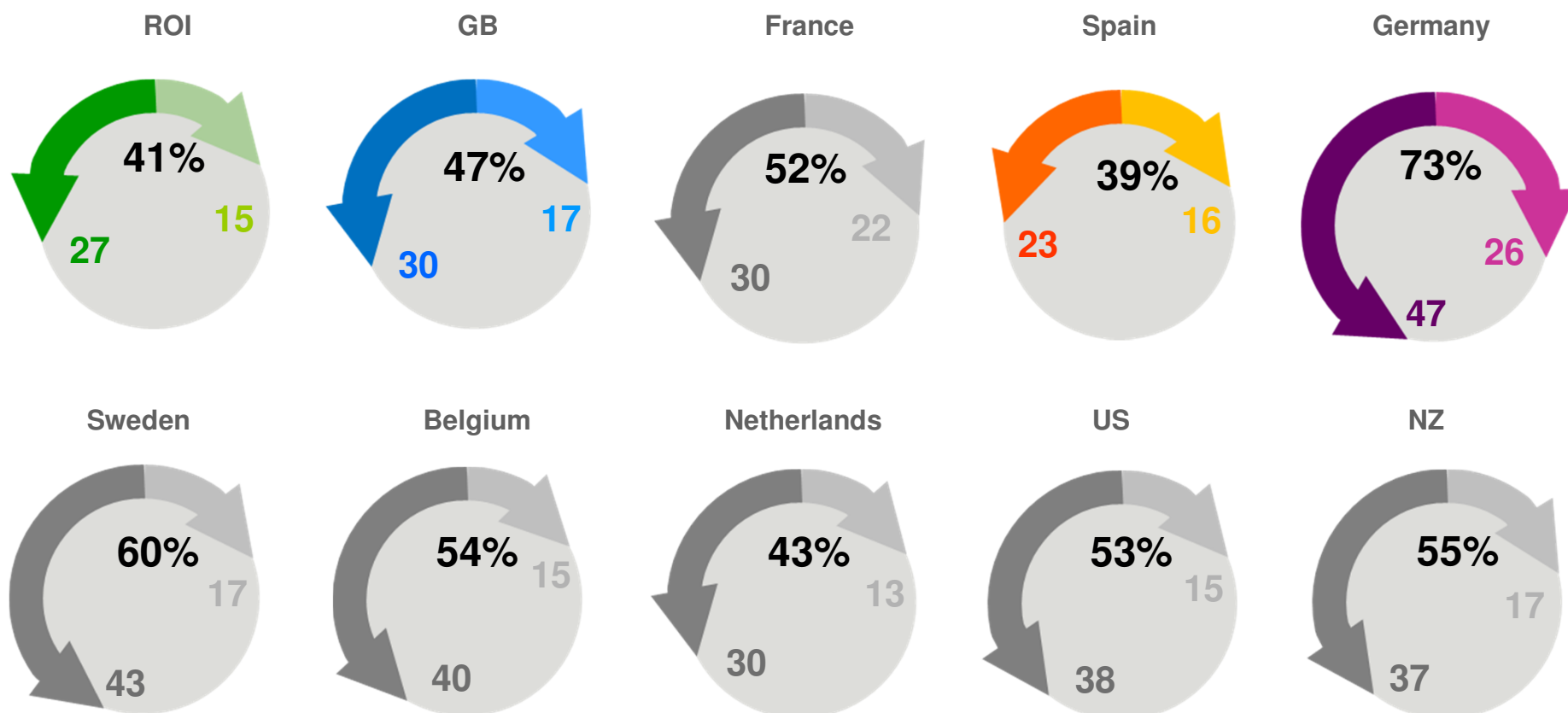
A Foodie World



The Germans have a particularly positive relationship with cooking. The Spanish, Irish and Dutch, on the other hand, display much less positivity when it comes to cooking. ⁴

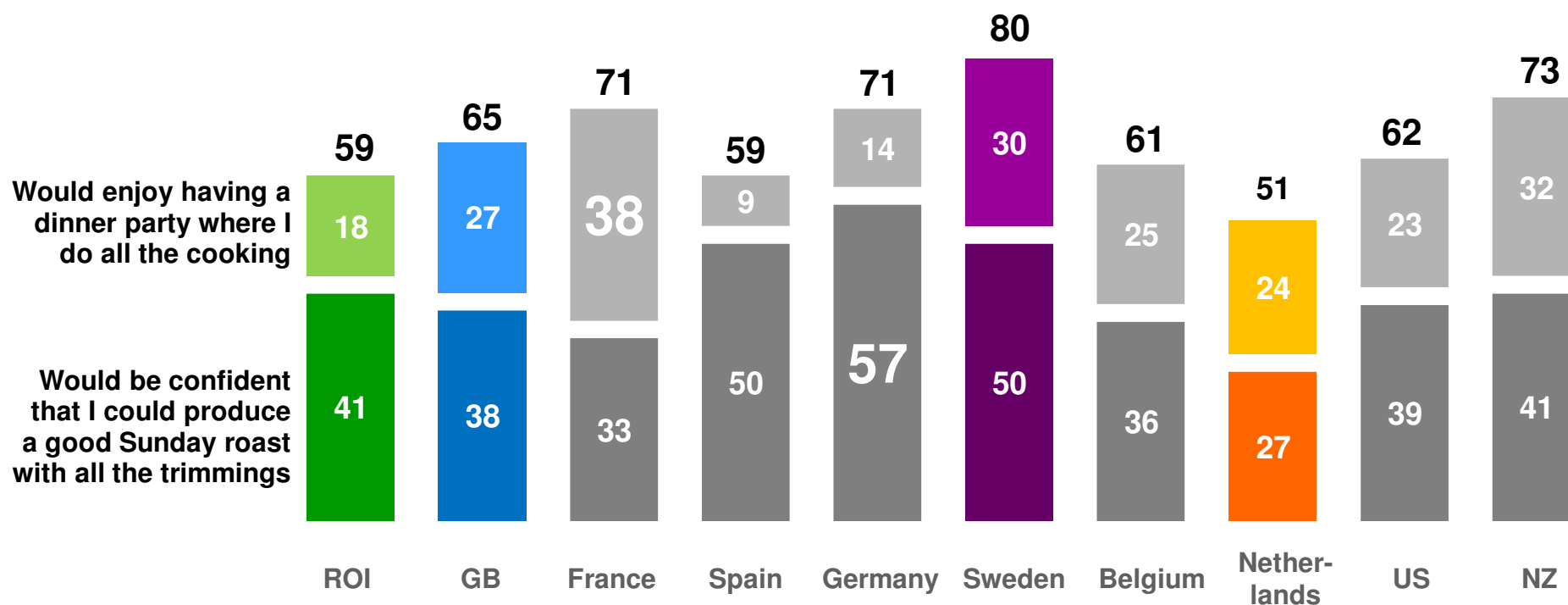
■ % Good Fun ■ % A Passion

Attitude towards cooking



Overall, Sweden has the most competent and confident cooks. France has the most dinner party hosts, while Germany is expert in producing a meal with all the trimmings. ⁵

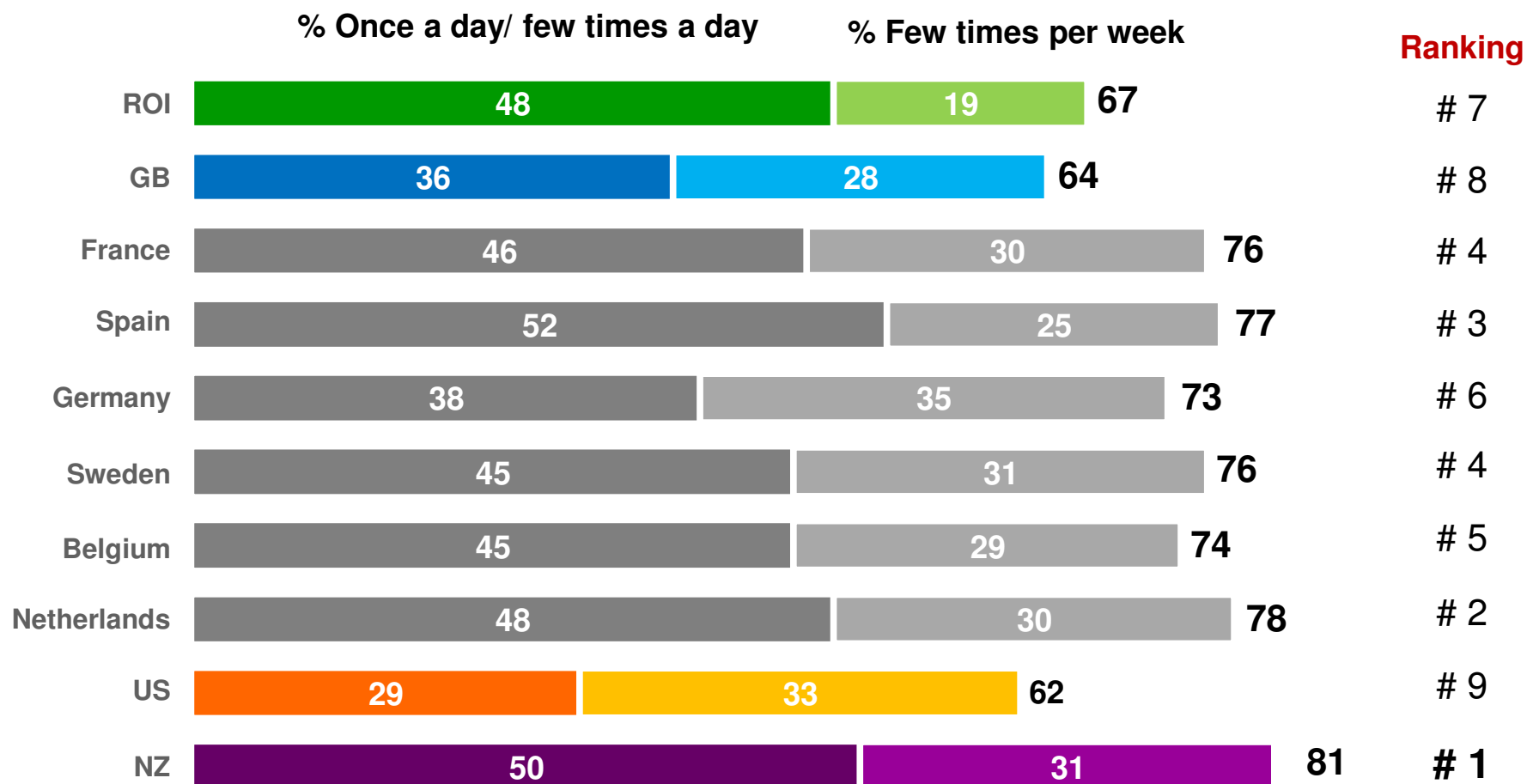
Level of cooking expertise



Scratch cooking is highest in New Zealand. With the exception of the US, GB & ROI, more than 7 in 10 are scratch cooking a few times daily/weekly.

6

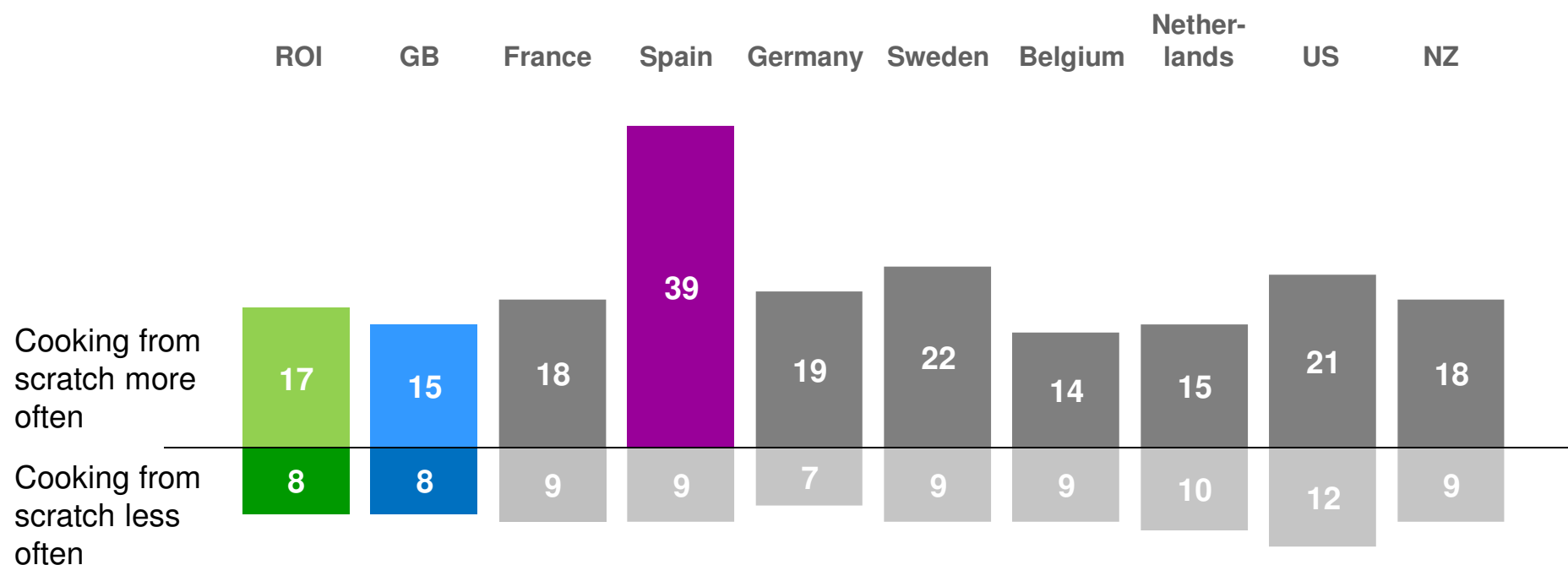
Scratch cooking



Generally, scratch cooking seems to have remained similar to a year ago. However, the Spanish have increased their scratch cooking activity more than anyone else.

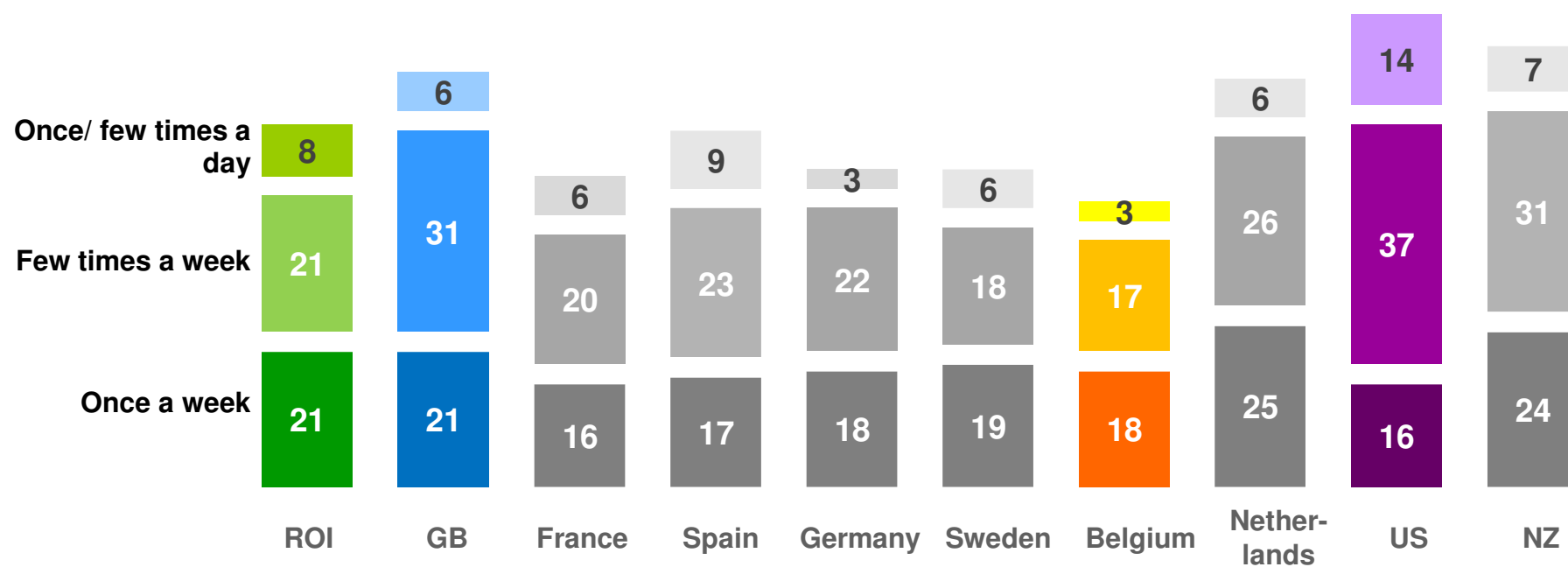
7

Frequency of cooking meals from scratch more often or less often compared to 12 months ago



In terms of daily and weekly usage of ready prepared ingredients, Belgium and France uses meal components the least. Usage is highest in the US, GB & NZ.

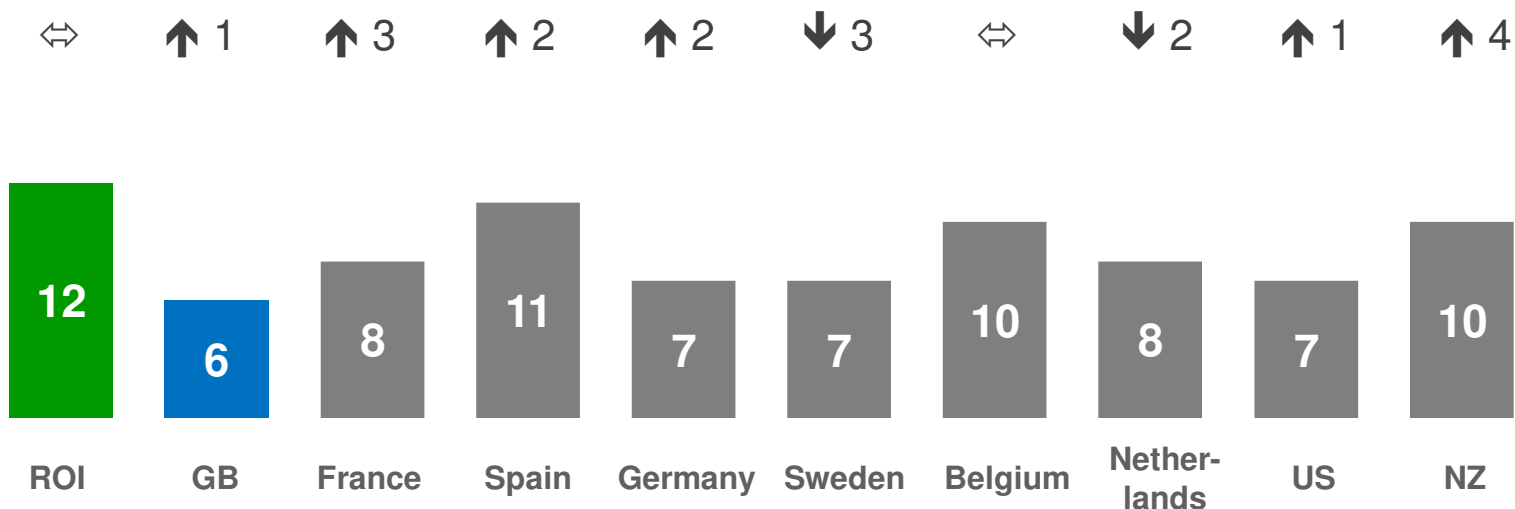
Usage of ready prepared ingredients



There is momentum behind developing cooking skills with most countries showing an increase in those attending cooking classes. ROI and Spain are the highest attenders. ⁹

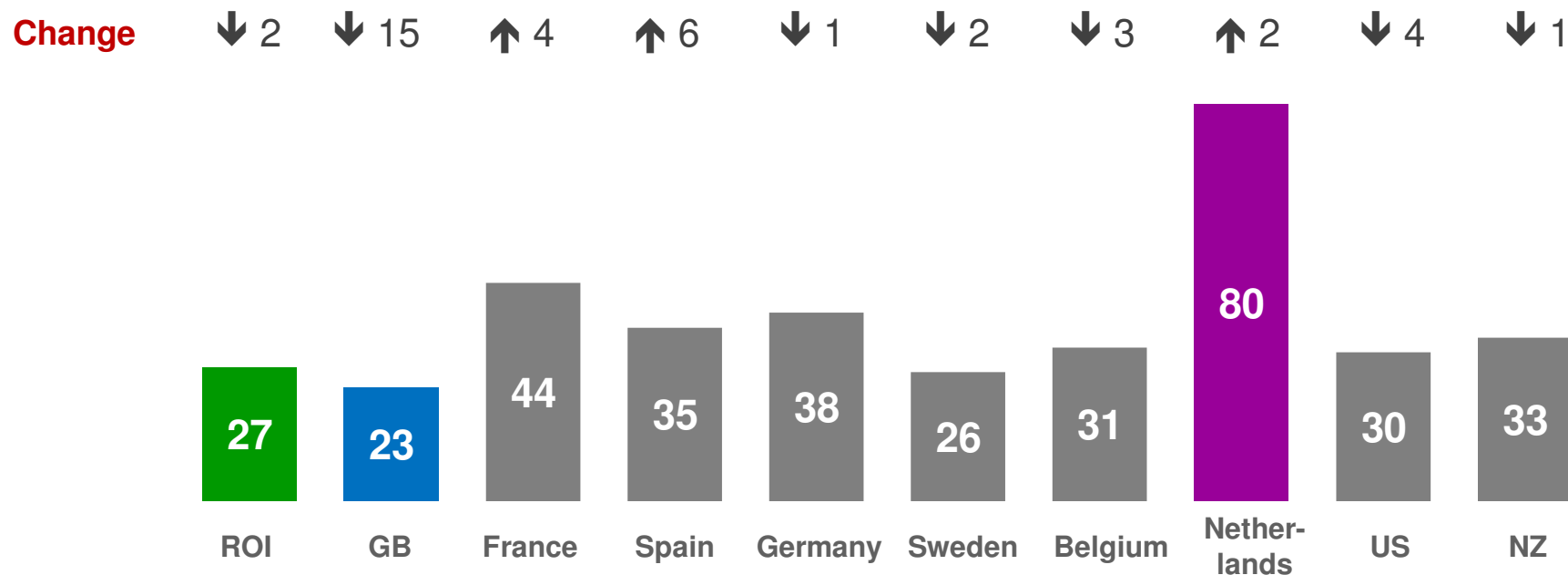
% who have attended/taken cooking classes in the past three years

Change



The Dutch claim to be entertaining at home more often considerably more than other countries. The general trend has been a decline in those entertaining at home. ¹⁰

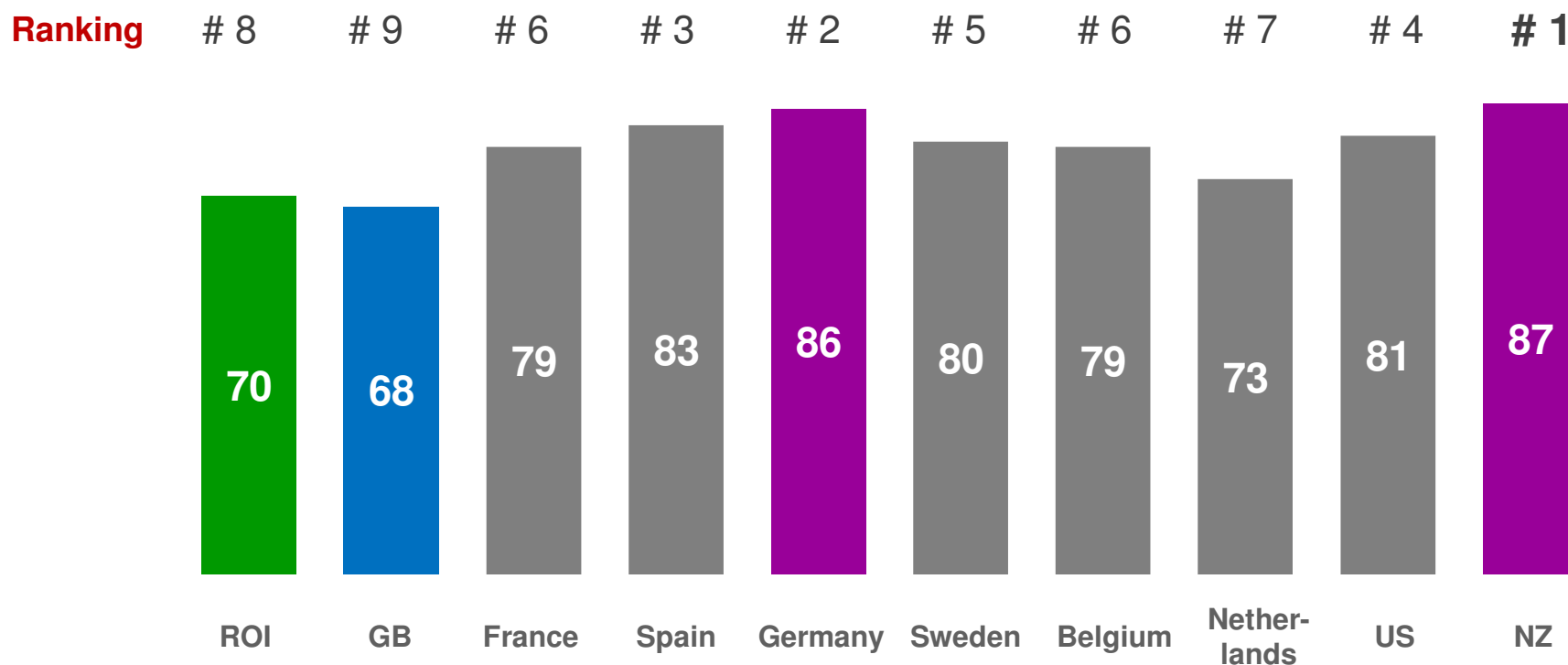
% who are entertaining at home more often nowadays



The majority of people get enjoyment from preparing a great meal. This is highest in New Zealand and Germany and lowest in GB & ROI.

11

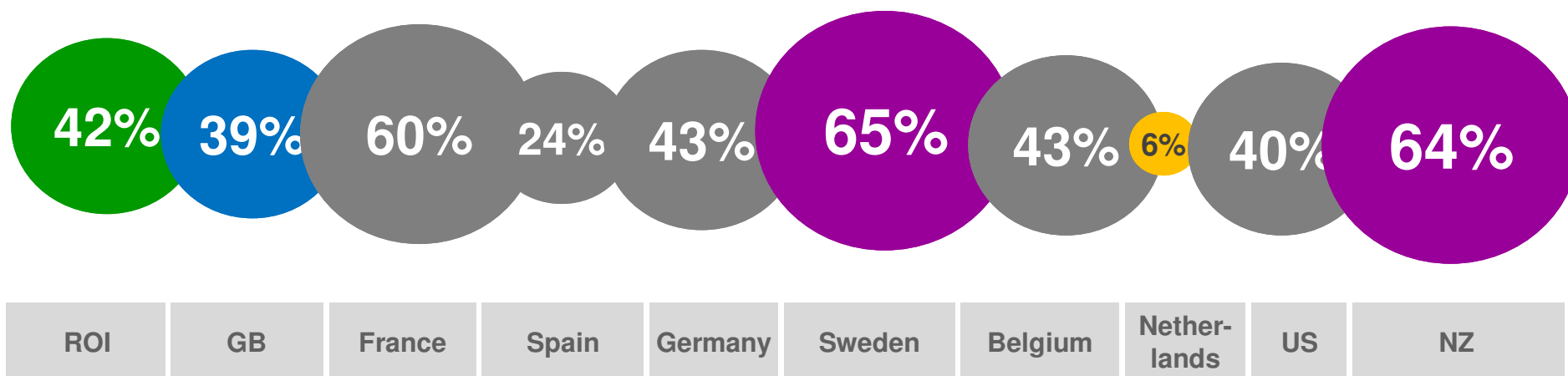
% who agree that they enjoy being able to prepare a great meal



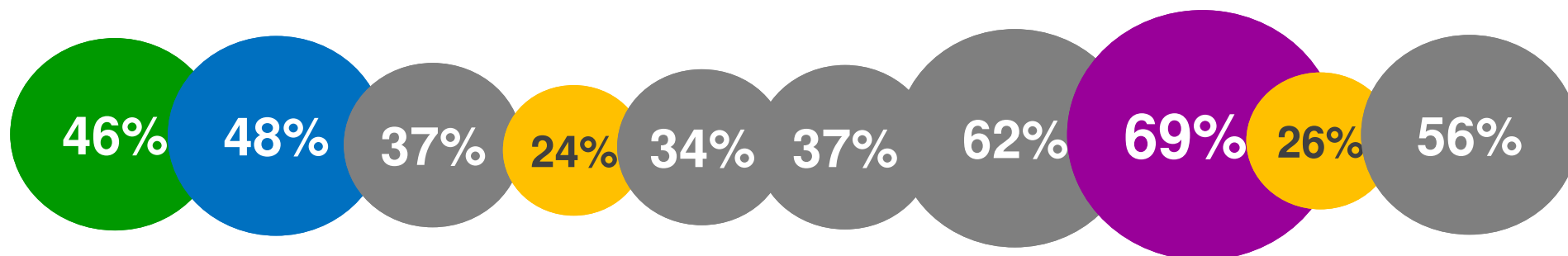
High ownership of food processors in Sweden, NZ & France suggest a more engaged food outlook. Woks, on the other hand, are all about fast, simple, versatile cooking.

12

% who own a food processor



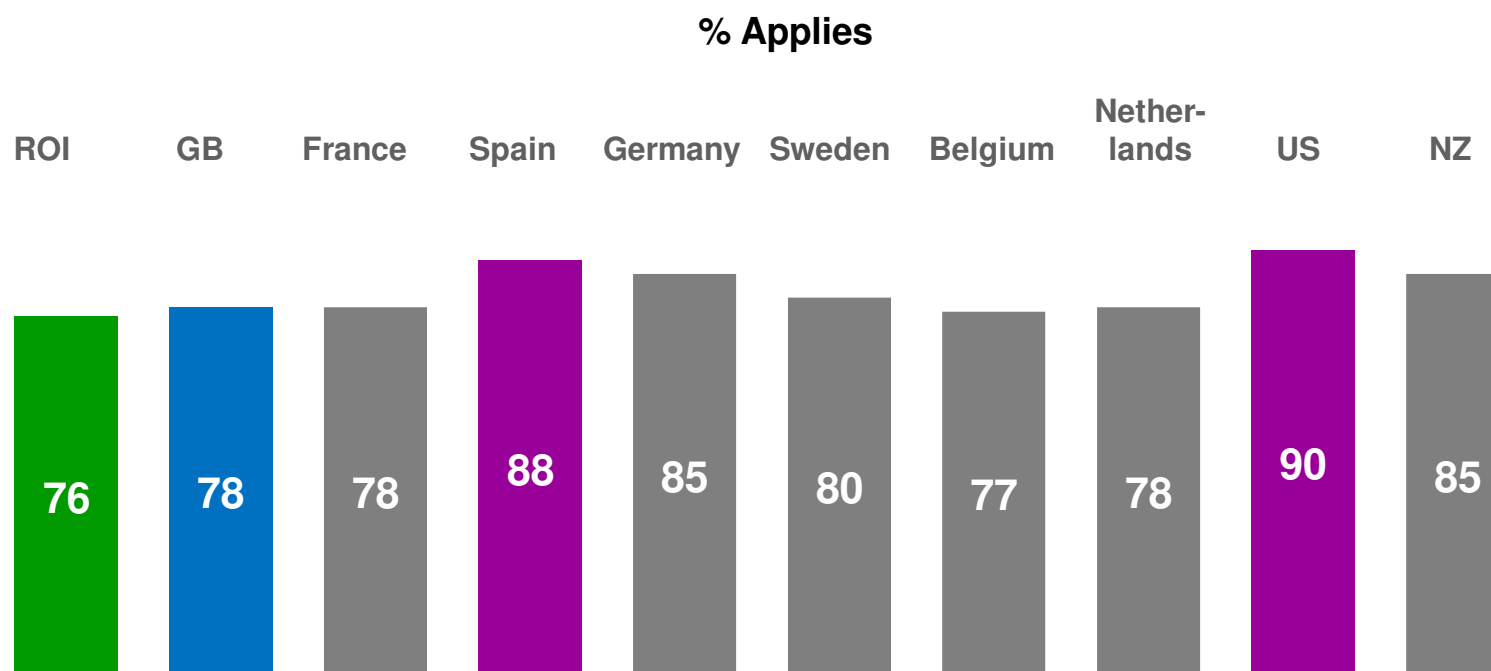
% who own a wok



All countries want foods that are not too time consuming. However, the US and Spain have the highest tendency to pick foods that are easy to prepare.

13

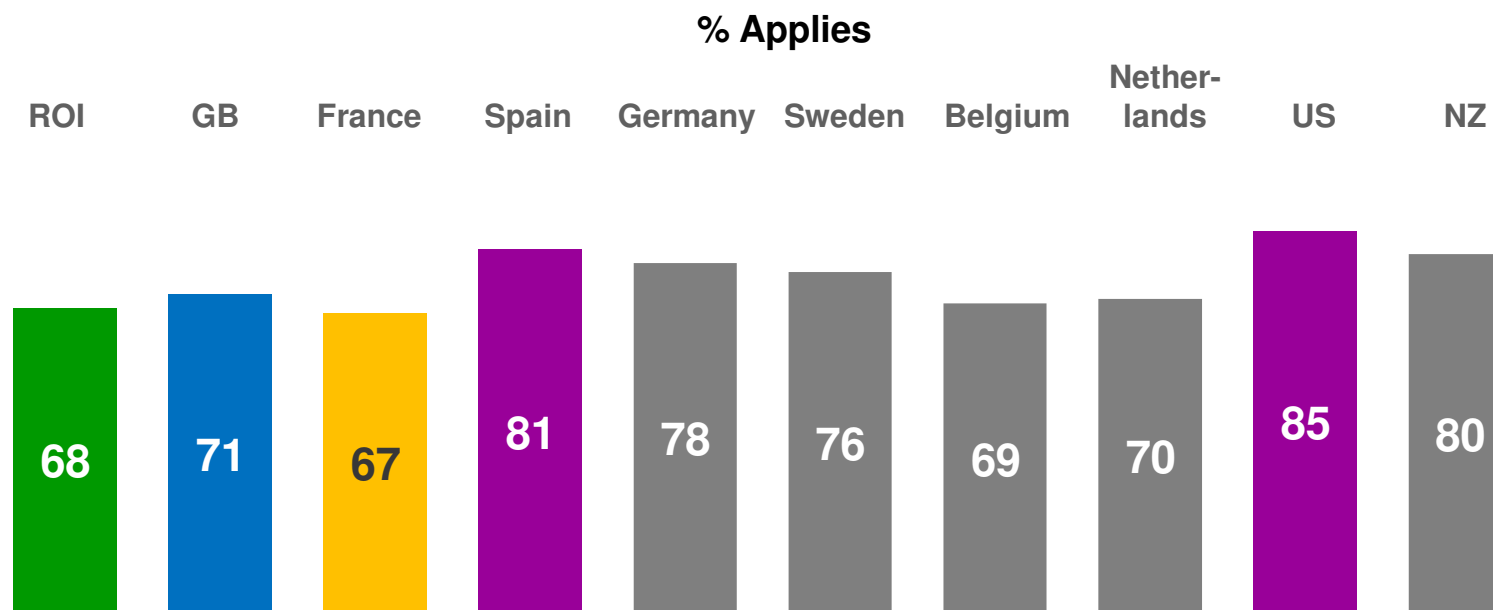
"I tend to pick foods that are easy to prepare"



The US, Spain and NZ have the highest tendency to pick foods that are quick to cook. France displays the lowest tendency to pick these foods.

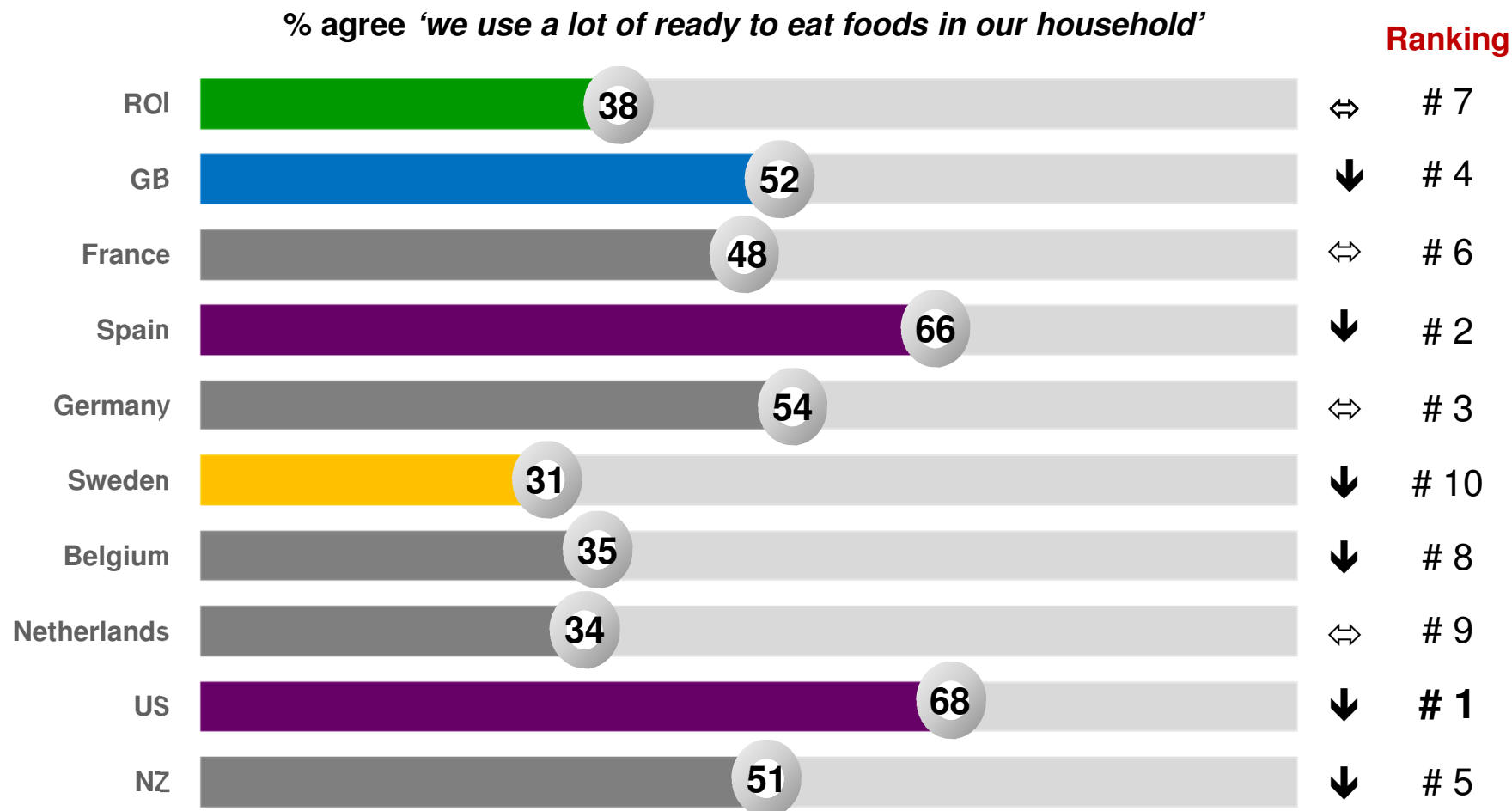
14

"I tend to pick foods that are quick to cook"



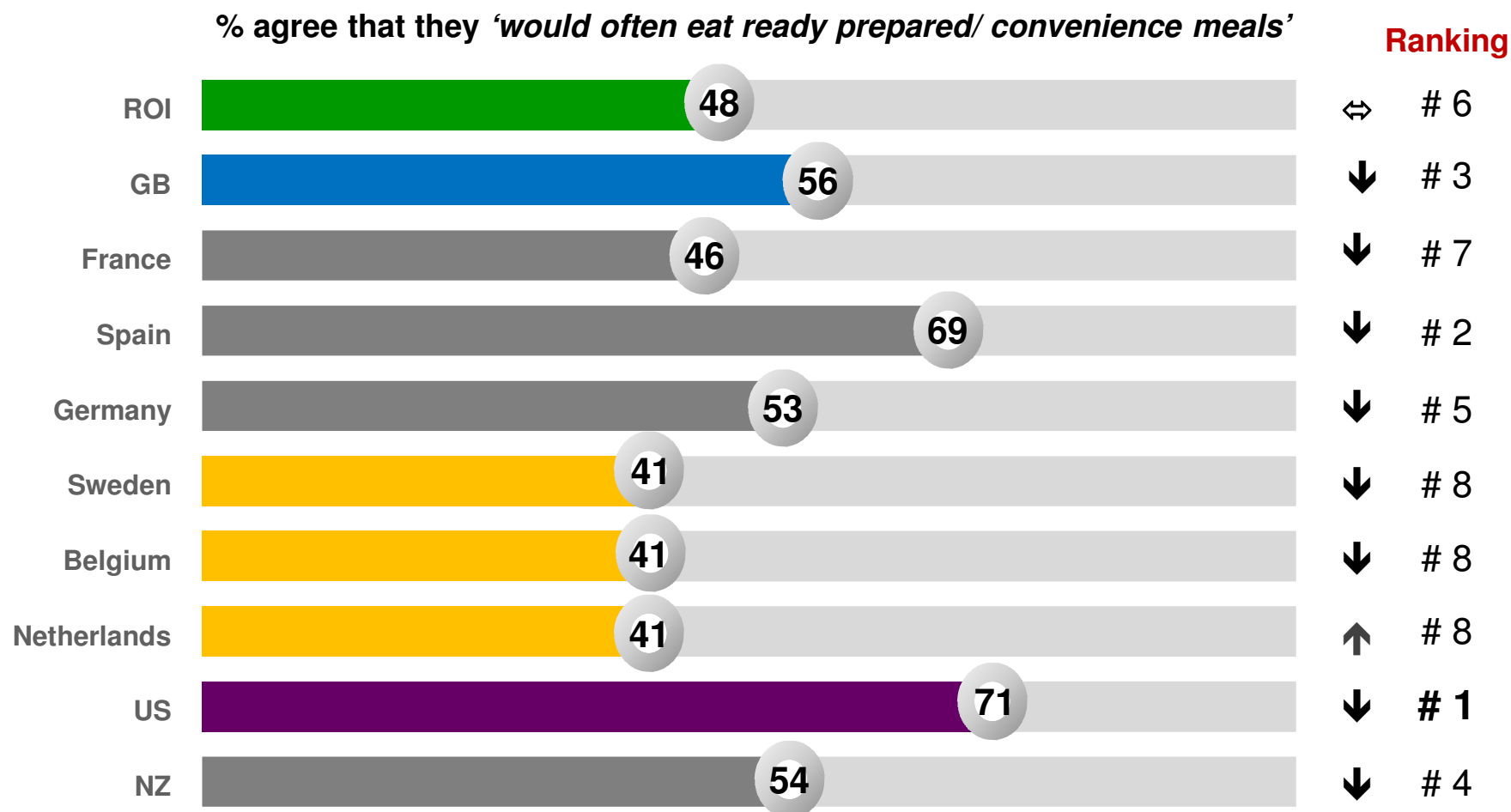
Usage of ready to eat foods in the household is highest in the US and Spain. ROI ranks amongst one of the lowest users of ready to eat foods.

15



The US and Spain indicate that they have higher rates of convenience meal consumption compared to other countries.

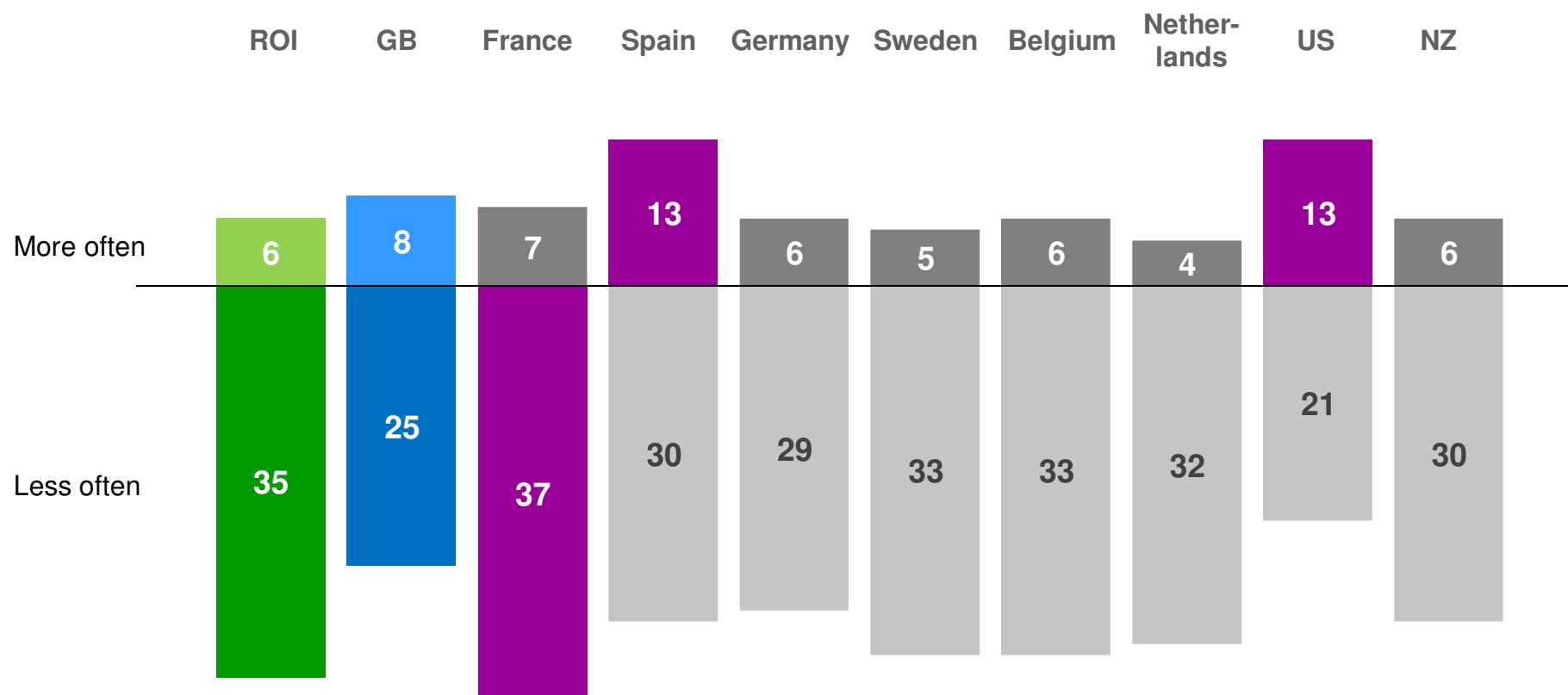
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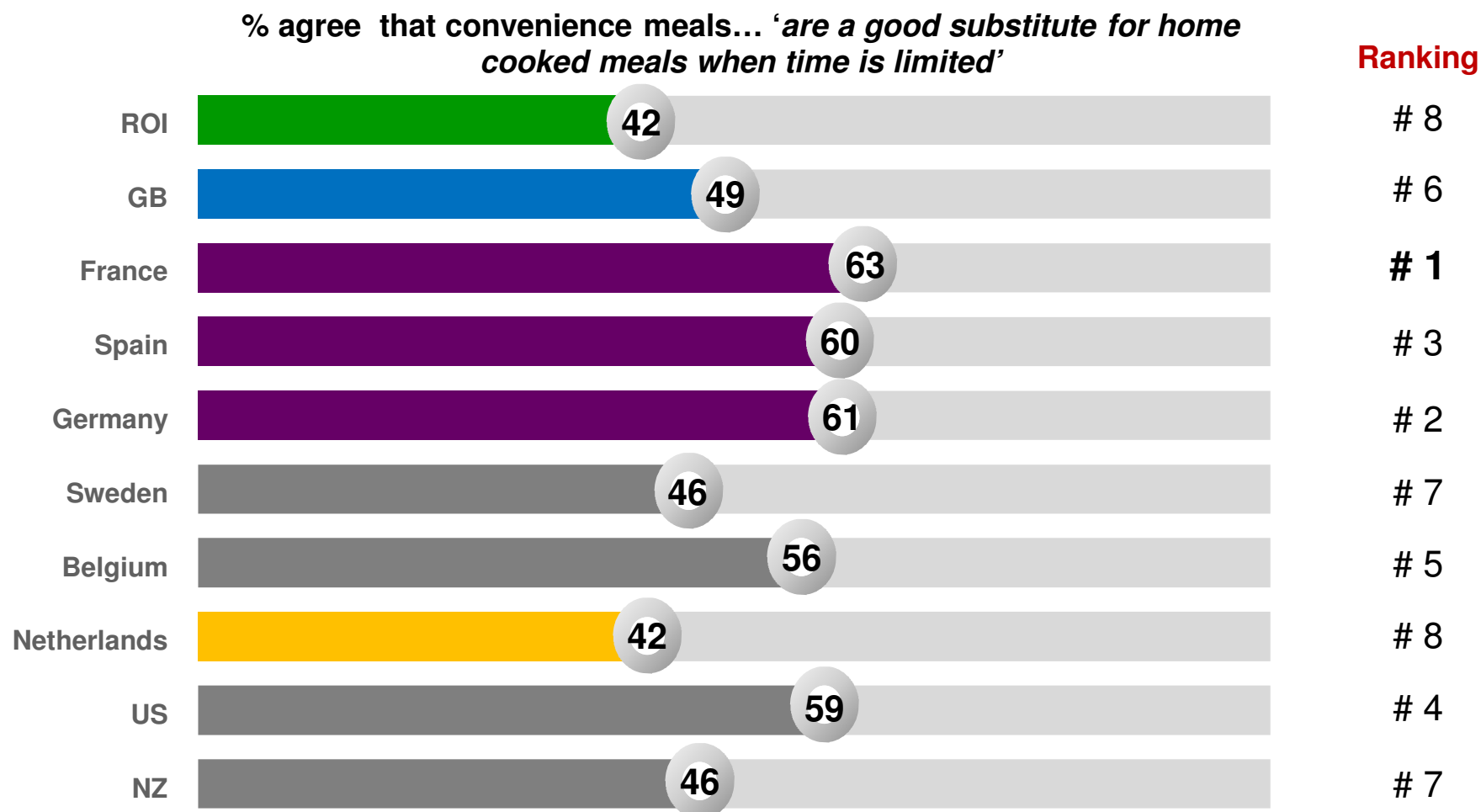
France and ROI have the highest proportion of adults claiming to eat convenience meals less often, compared to 12 months ago.

17

Eating convenience meals more or less often than 12 months ago

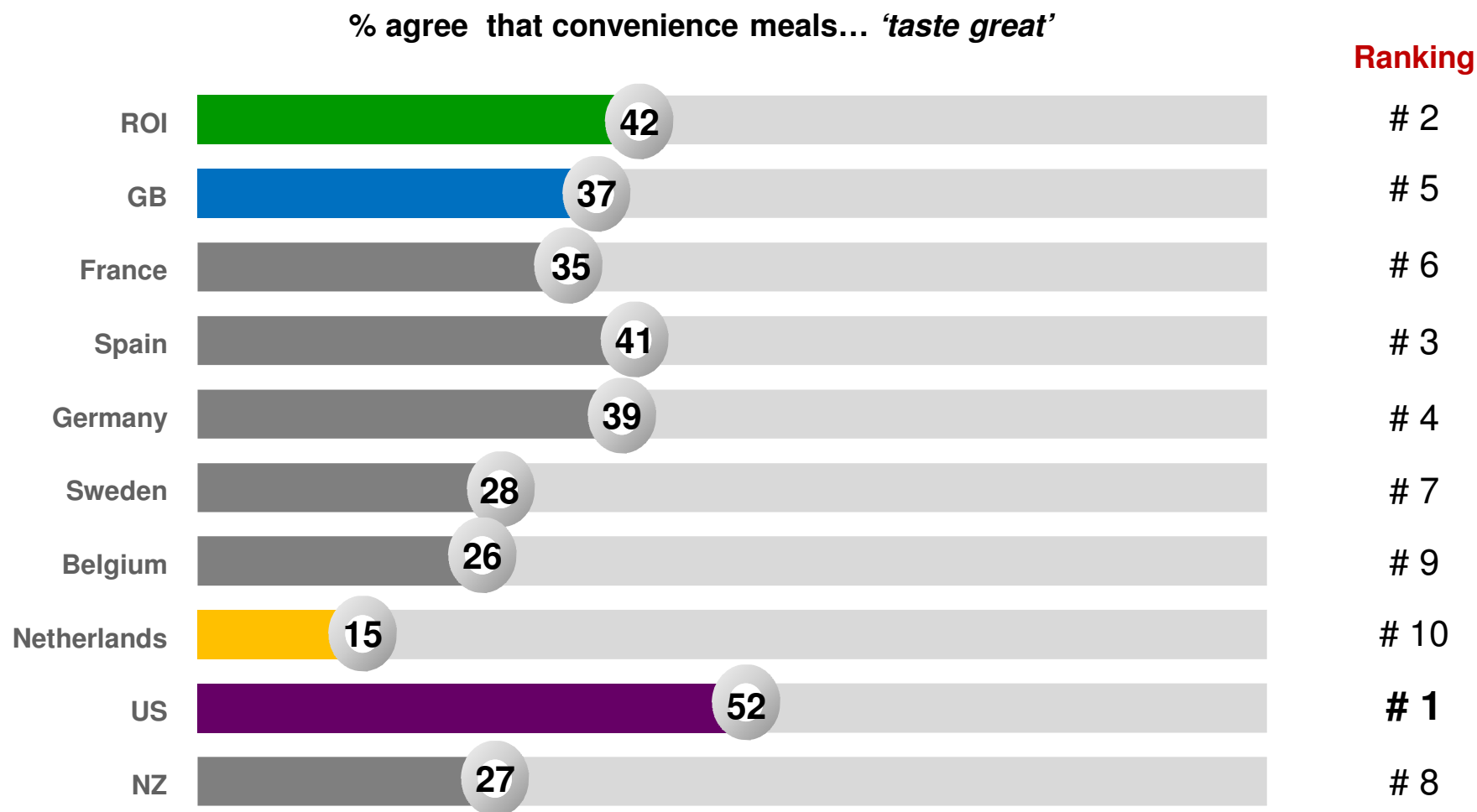


More than half of adults in five of the countries surveyed consider convenience meals as a good substitute for home cooked meals. The Dutch & Irish are least likely to agree. ¹⁸



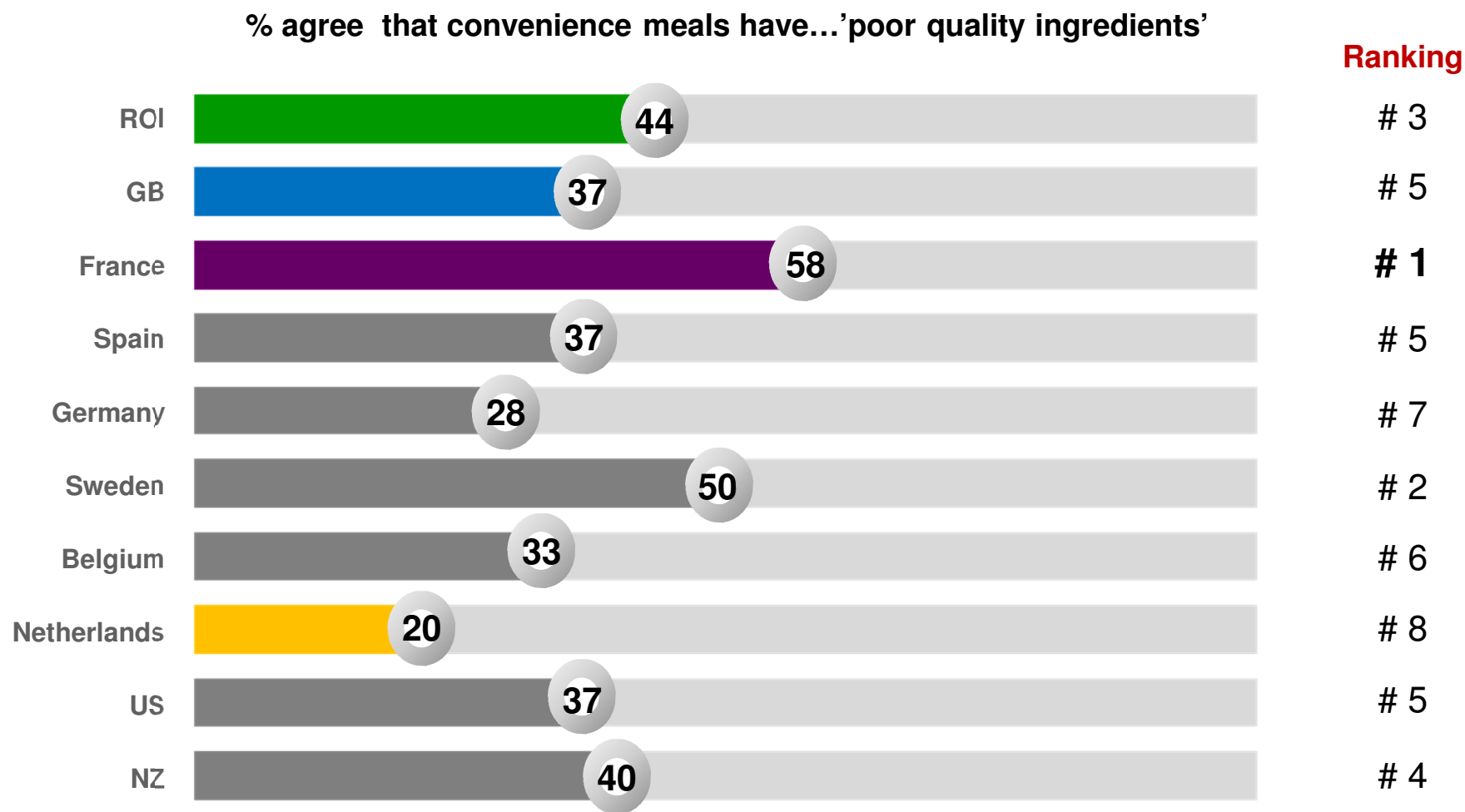
For all countries, except the US, there are relatively low levels of support for the idea that convenience meals taste great. ROI ranks among the most positive countries.

19



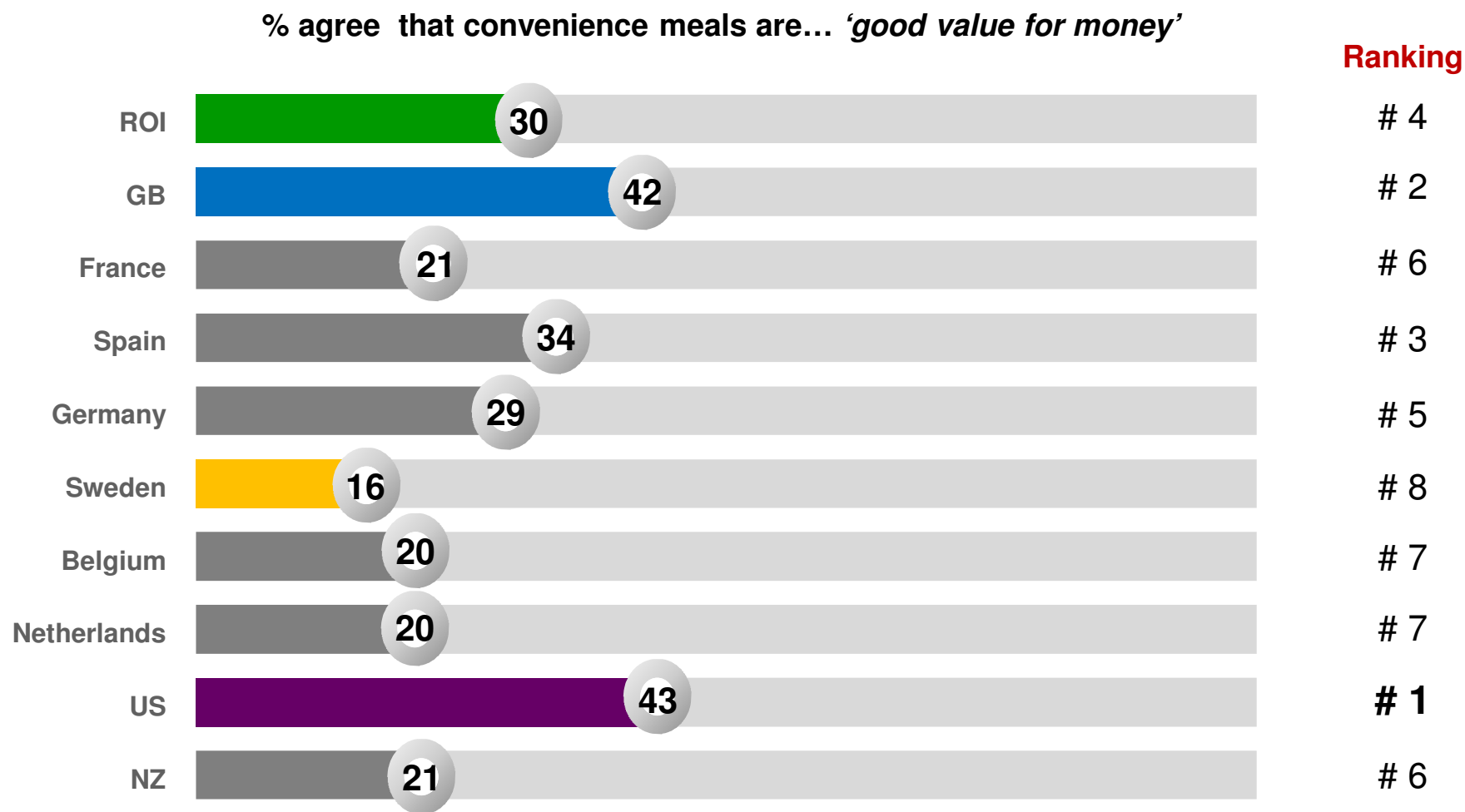
Compared to other countries, the French have the most negative view about the ingredients contained in convenience meals.

20



In the main, convenience meals are not typically associated with 'value for money'. However, the US and GB are more likely than others to make this association.

21



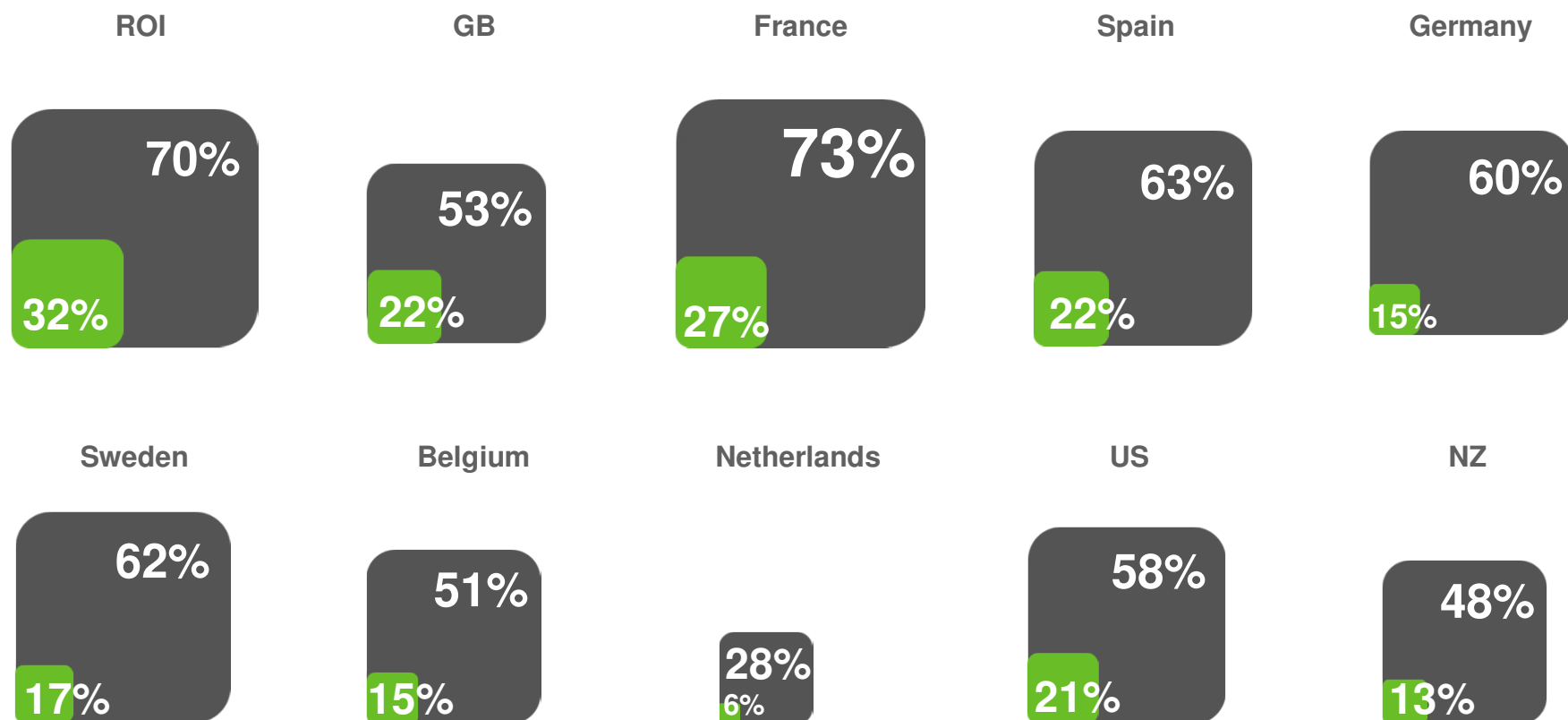
Back To Basics



France and ROI place the most importance on buying local food. In comparison, the Dutch are particularly disconnected from the 'buy local' trend.

23

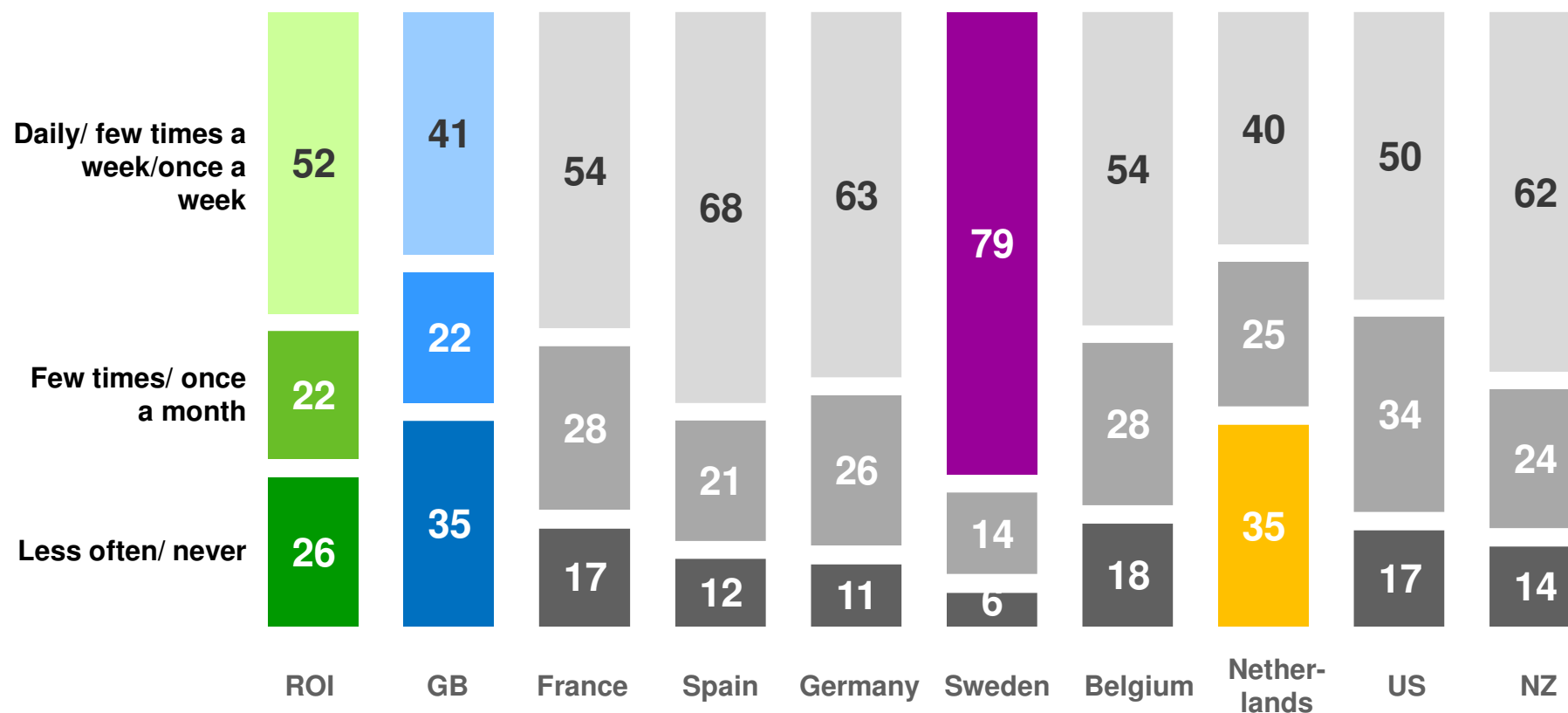
 **Buying local food is very important**  **Total importance of buying local food**



Purchases of local food is highest in Sweden. The Netherlands, GB & ROI have the highest proportion of people who buy local less often/never.

24

Frequency of 'local food' purchases



The majority of countries define local food as food that is made in close proximity to where one lives. The association with farmers markets is much lower.

25

***'Made within a close
proximity to where I live'***

Sweden	(58%)
ROI	(54%)
GB	(49%)
Spain	(47%)
Germany	(45%)
NZ	(44%)
Netherlands	(43%)

***'Available in farmers
markets'***

US	(58%)
France	(46%)

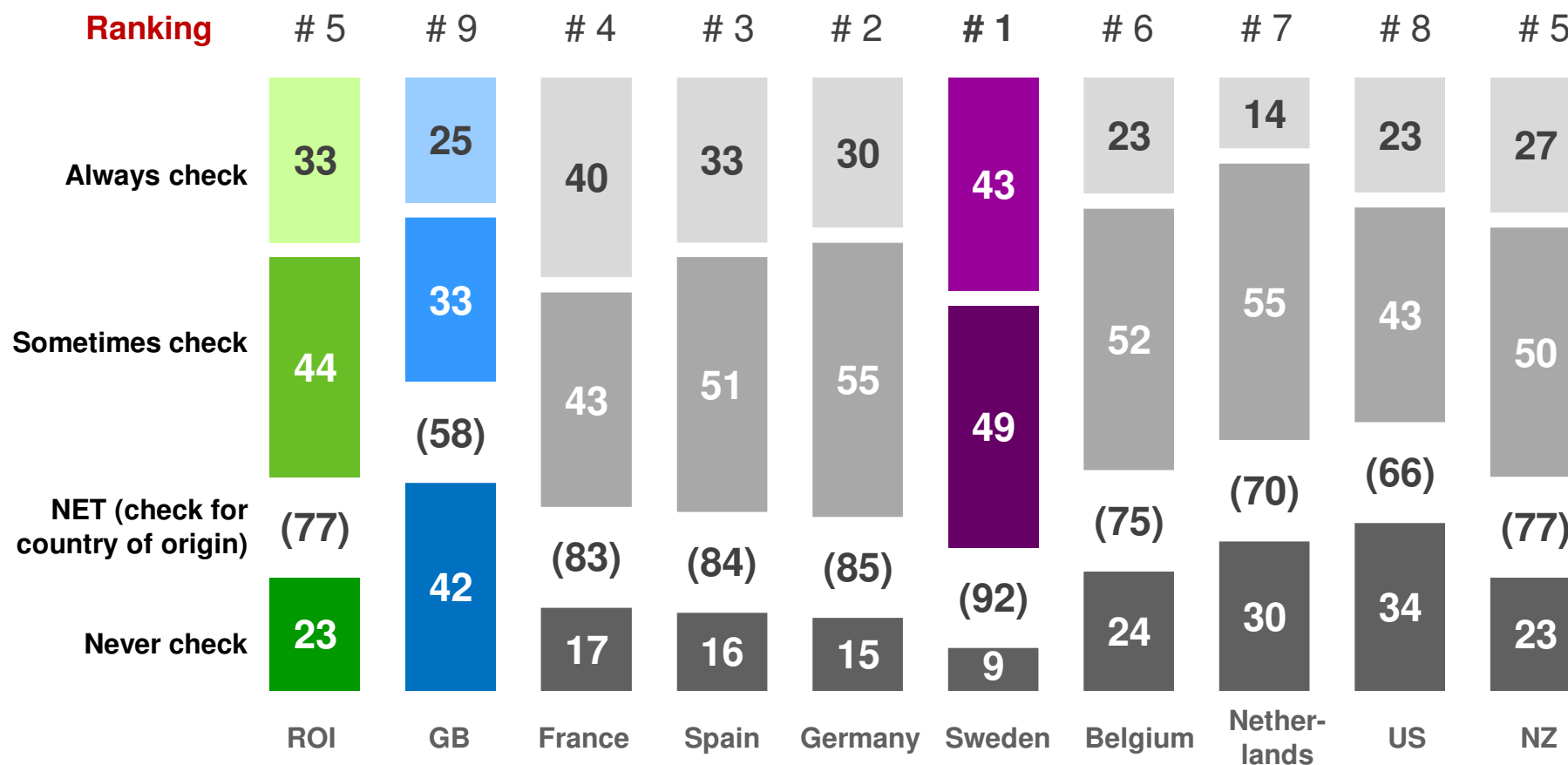
***'Made within the
county in which I
live'***

Belgium	(45%)
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GB shows the least likelihood for checking for country of origin on food products while Sweden shows the most. ROI ranks somewhere in the middle.

26

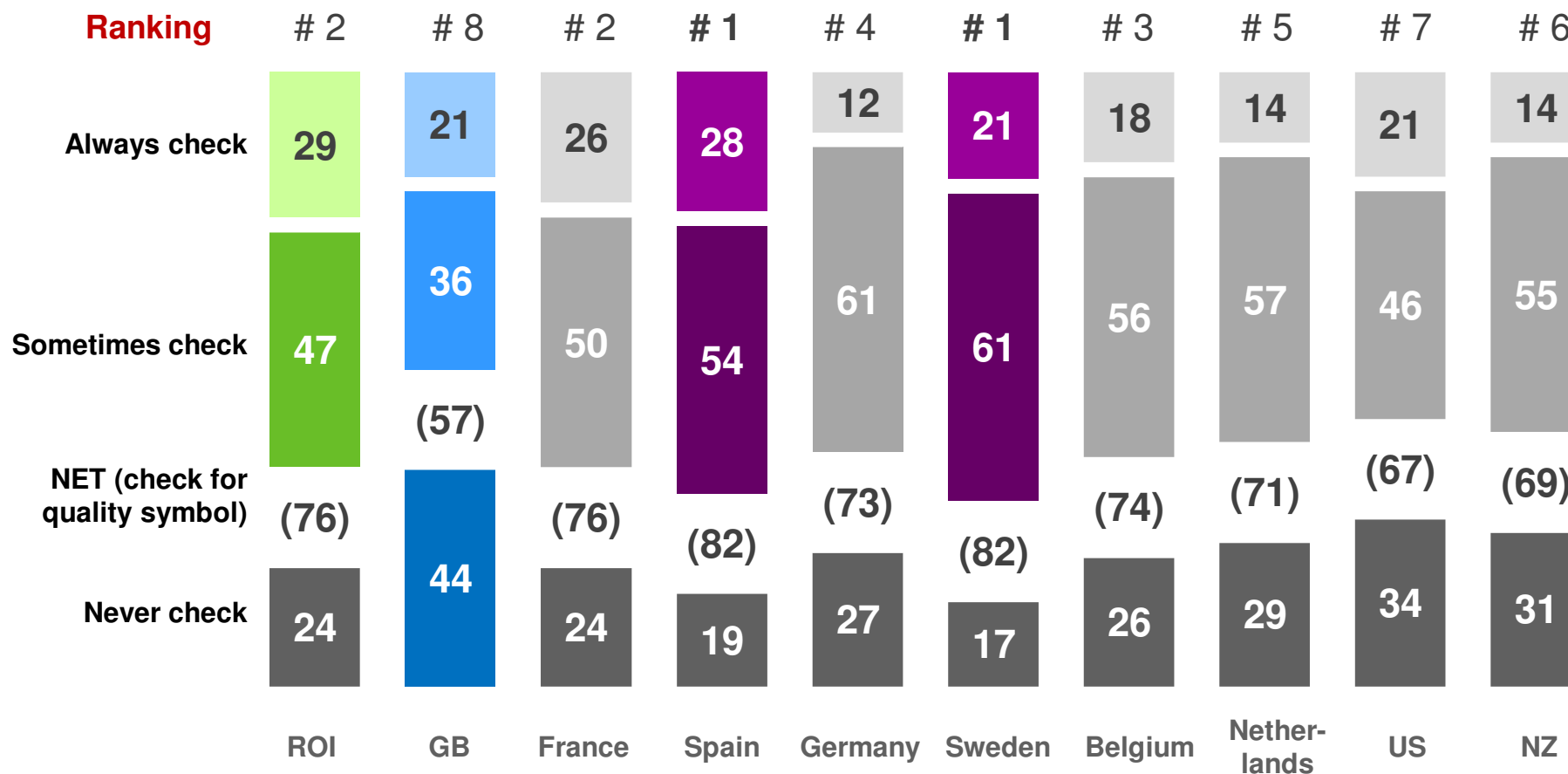
Checking for Country of Origin label



Checking for quality symbol is highest in Spain and Sweden. France & ROI follow close behind. In GB, this label carries the least weight for grocery shoppers.

27

Checking for Symbol of Quality label



While spending time together as a family at mealtime is important in all countries, certain countries seem to hold this practice in higher regard.

28

% applies – It is important to spend time over dinner as a family



Food & Sustainability

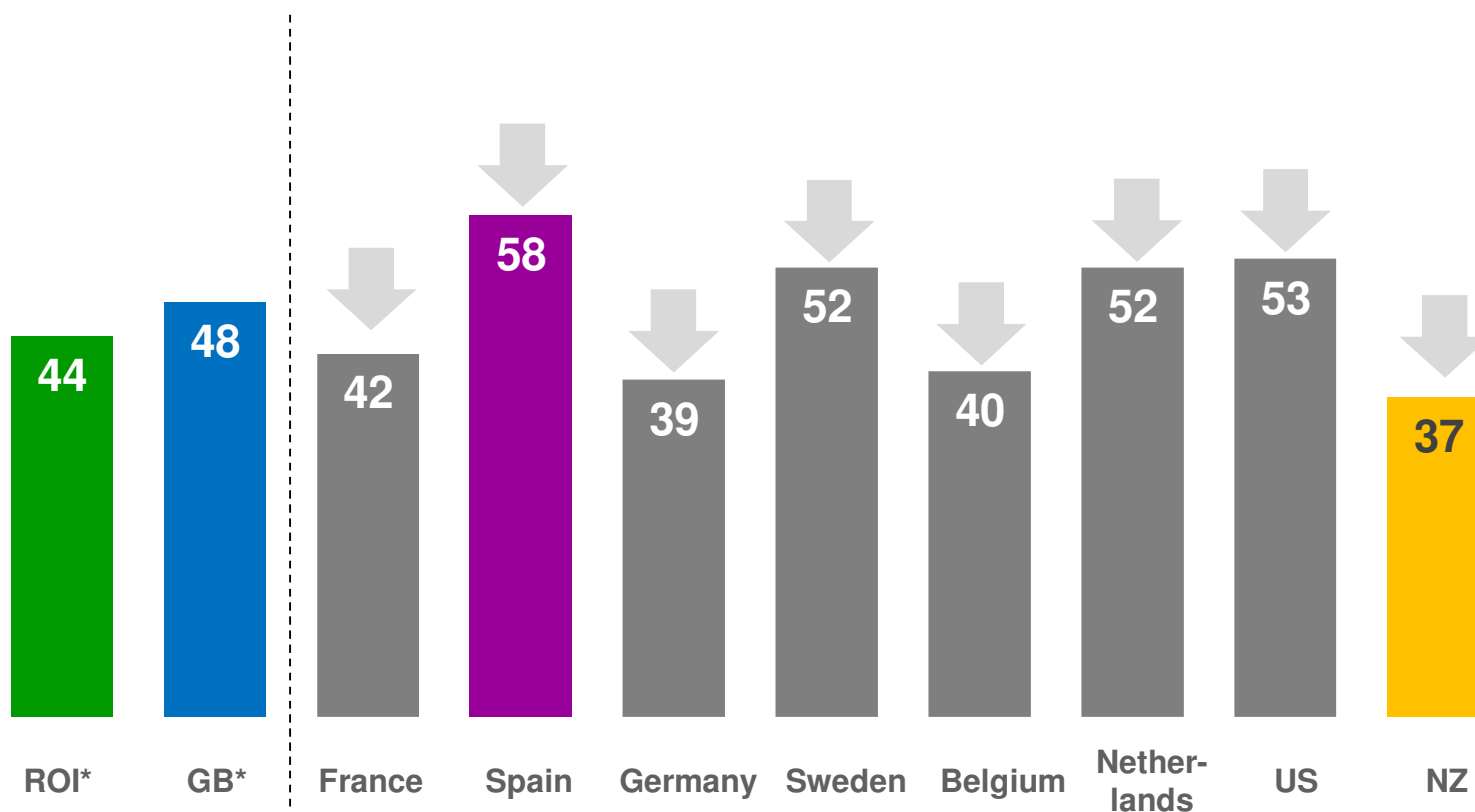


More than half of all adults in Spain, the US, Sweden and the Netherlands claim to have never heard of food miles. Awareness levels seems to be improving overall.

30

↓ = % awareness
compared to last
survey

% who claim never to have heard of Food Miles



* New question wording
for ROI & GB in 2013

Belgium, Germany and France have the highest percentage of people buying food with low food miles.

31

% who buy foods with low food miles



TOTAL % who buy foods with low food miles



% who sometimes try to buy food with low food miles

ROI



GB



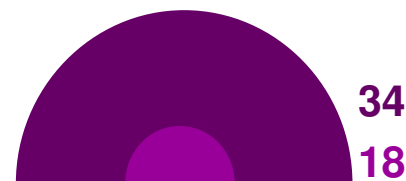
France



Spain



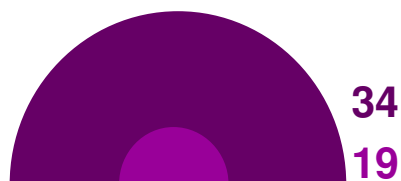
Germany



Sweden



Belgium



Netherlands



US

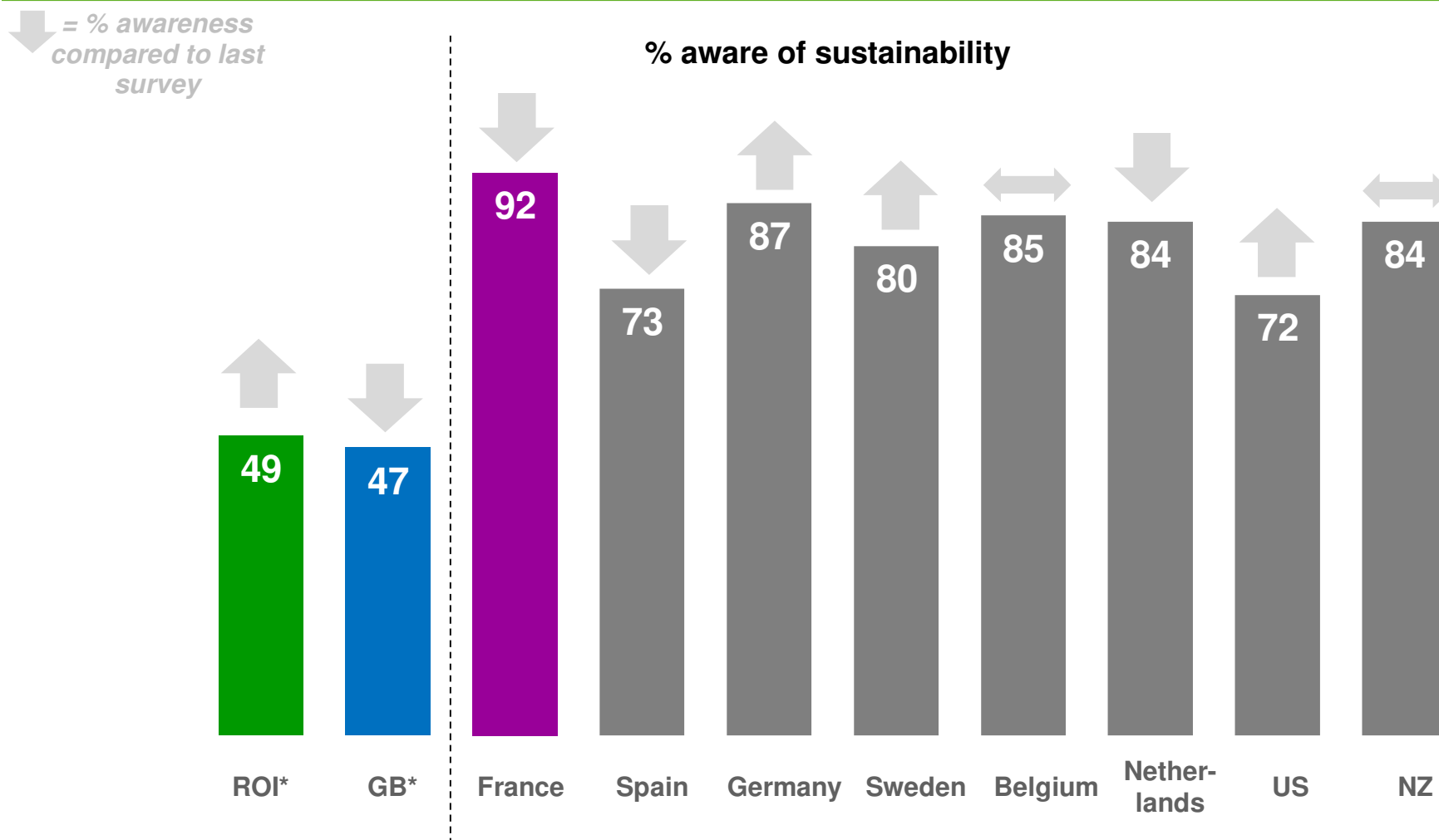


NZ



ROI & GB have relatively low levels of awareness of the term sustainability. In 2013, the general trend has been for awareness of sustainability to improve or stay the same.

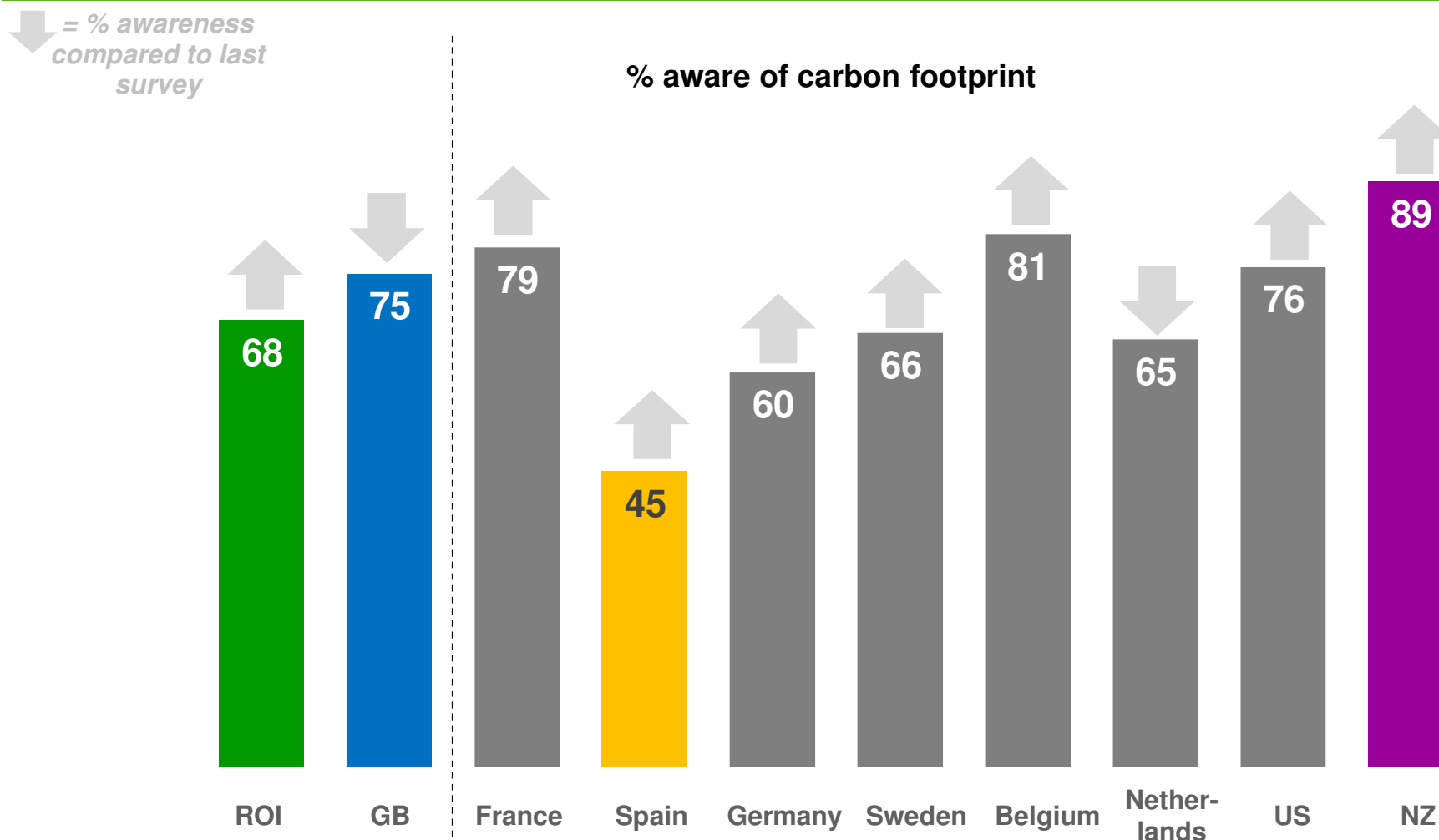
32



* Question wording different in ROI & GB

The Spanish have the lowest level of awareness when it comes to carbon footprint. Awareness levels are improving in all countries except GB & the Netherlands.

33



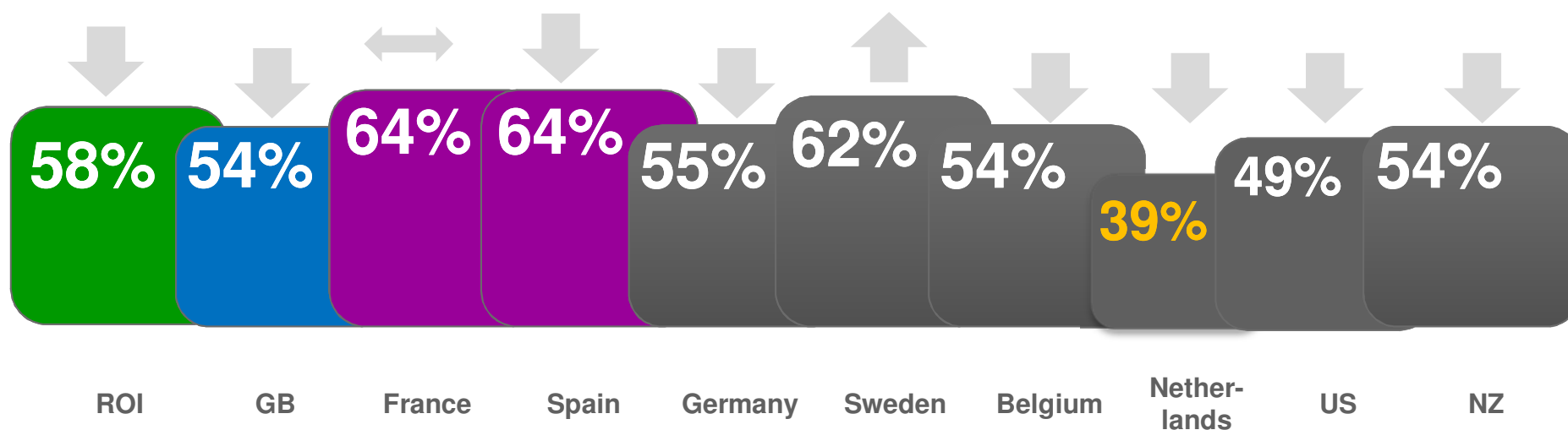
* Question wording different in ROI & GB

Consumer consciousness of environmental issues in their choice of products is declining in most countries. It is weakest in the Netherlands.

34

↓ = % awareness
compared to last
survey

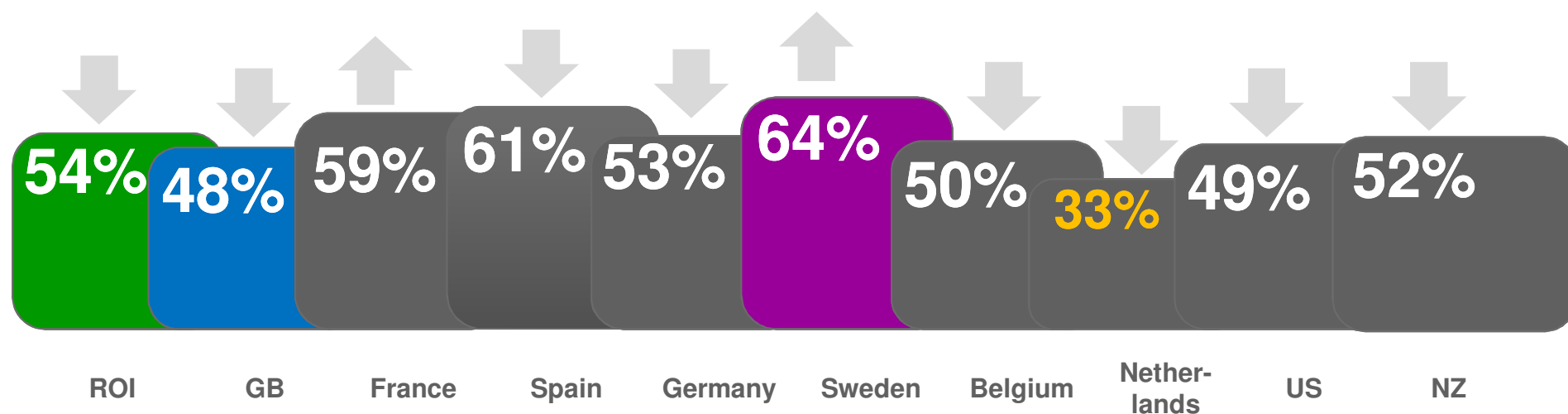
**% who agree that they are more conscious of environmental issues in their
choice of products**



Sweden and Spain display higher preferences for buying from environmentally aware companies but this purchasing preference is declining in most countries in recent times.³⁵

↓ = % awareness
compared to last
survey

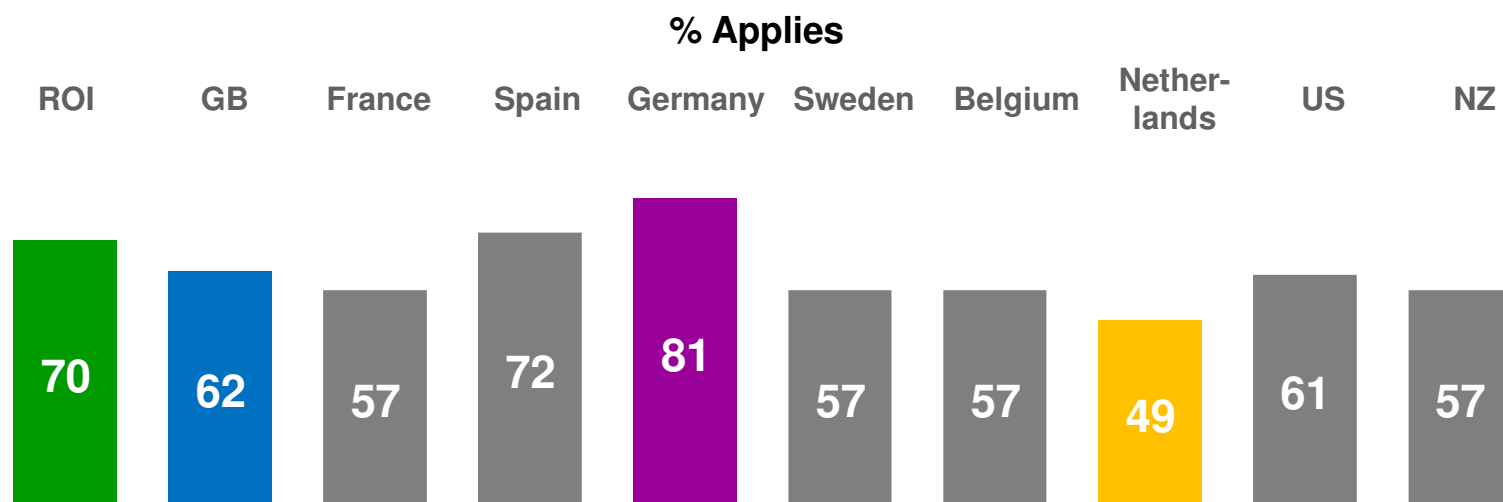
**% who agree that they prefer to buy from companies that are aware of the
impact of environmental issues**



Germany's purchases of smaller packs as a means of avoiding waste is higher than any other country. The Netherlands adopt this behaviour considerably less.

36

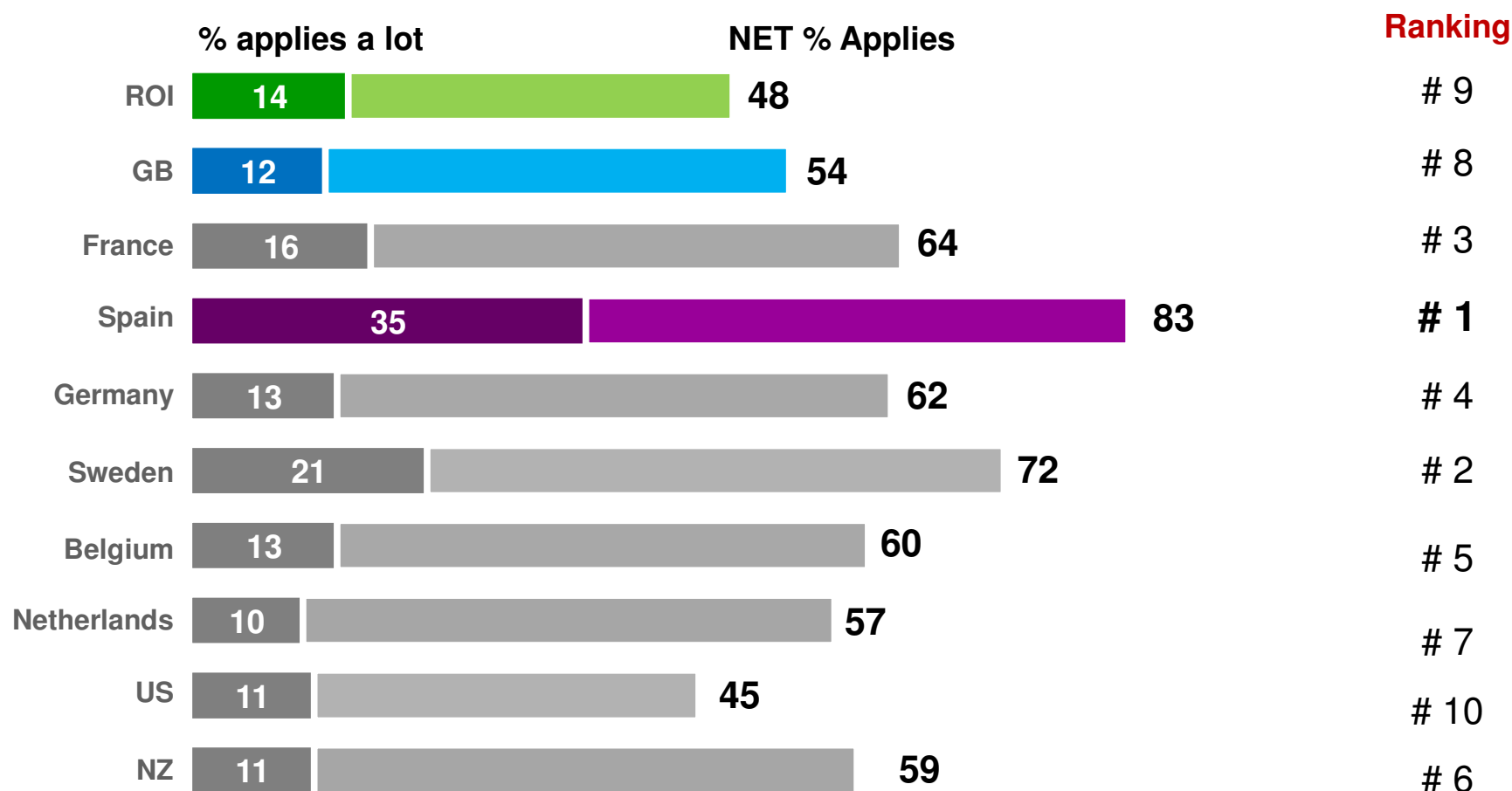
I buy food in smaller packs because it means less waste



The Spanish claim to be particularly engaged with the Fair Trade movement. The US, ROI and GB are the least engaged.

37

I try to buy Fair Trade products/brands whenever they are available

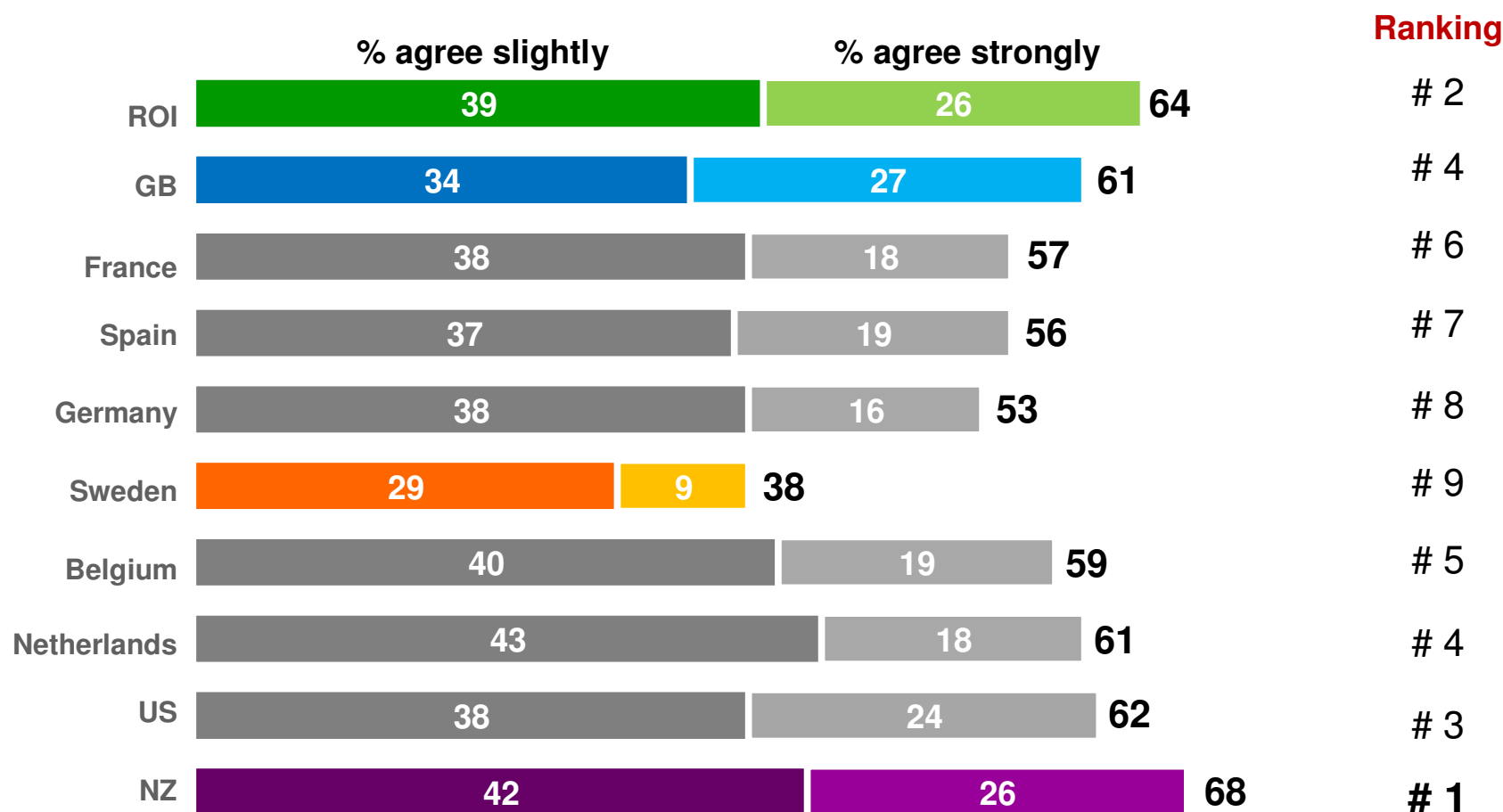


Shopping Around



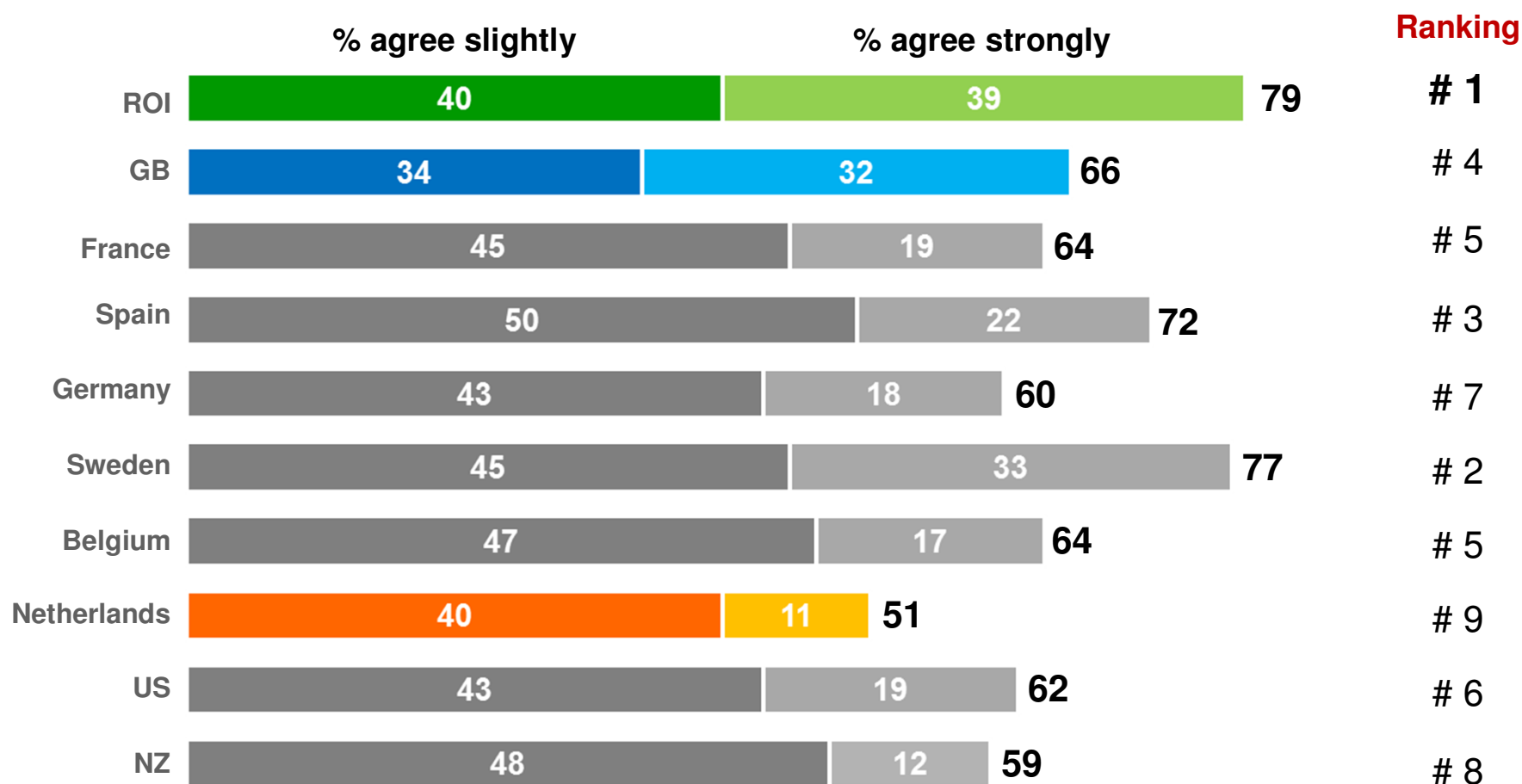
More than 6 in 10 grocery shoppers in NZ, ROI, US and GB admit that looking at price is the first thing they do when they shop for grocery items. 39

When I shop the first thing I look for is price



Across all countries, the majority of people believe that the quality of fresh food is more important than price. This view is strongest in ROI and Sweden. 40

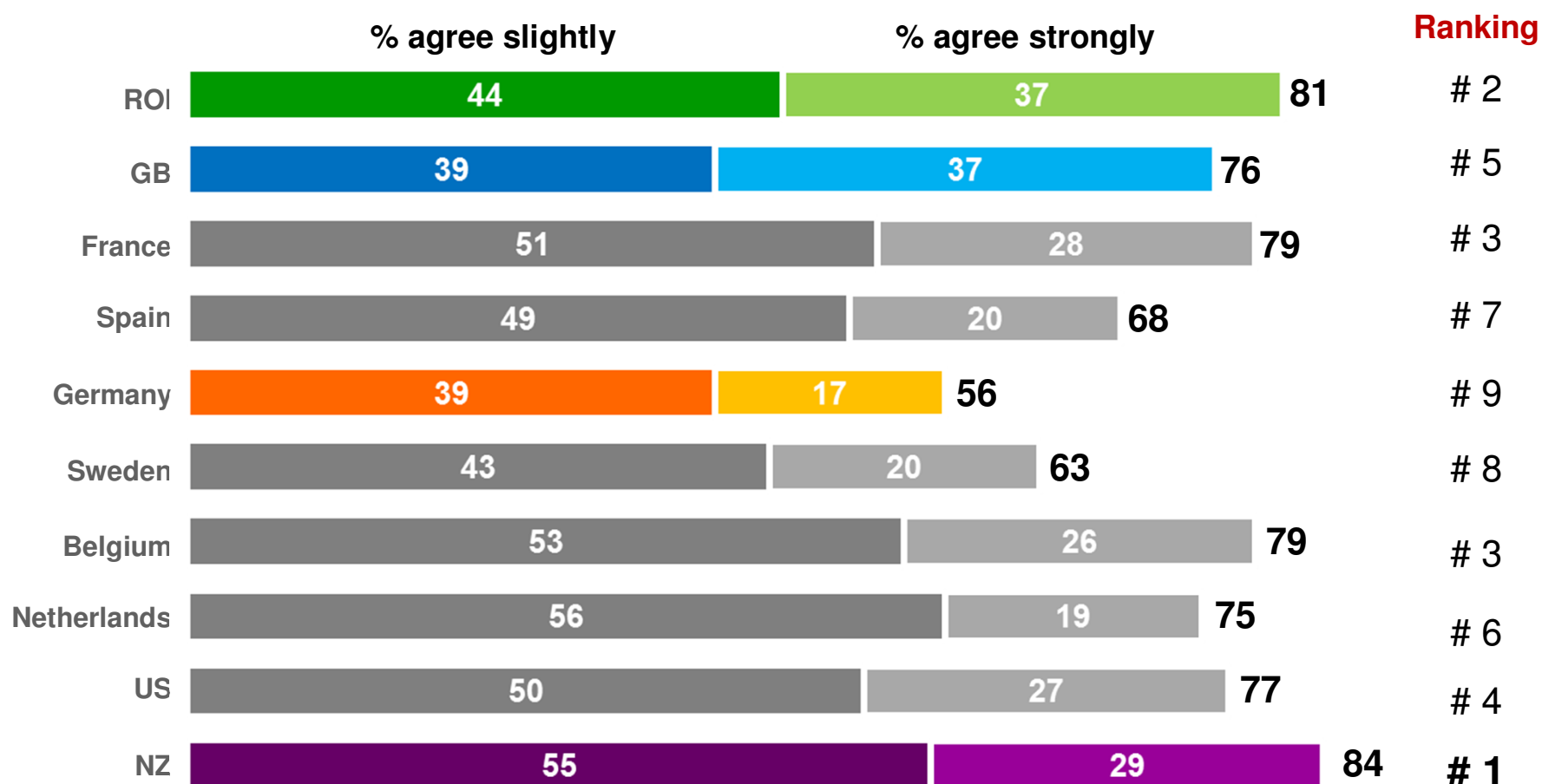
Quality of fresh food is more important than price



Shopping in the same store but being vigilant about value in that store is a common shopping characteristic in all countries, particularly NZ & ROI.

41

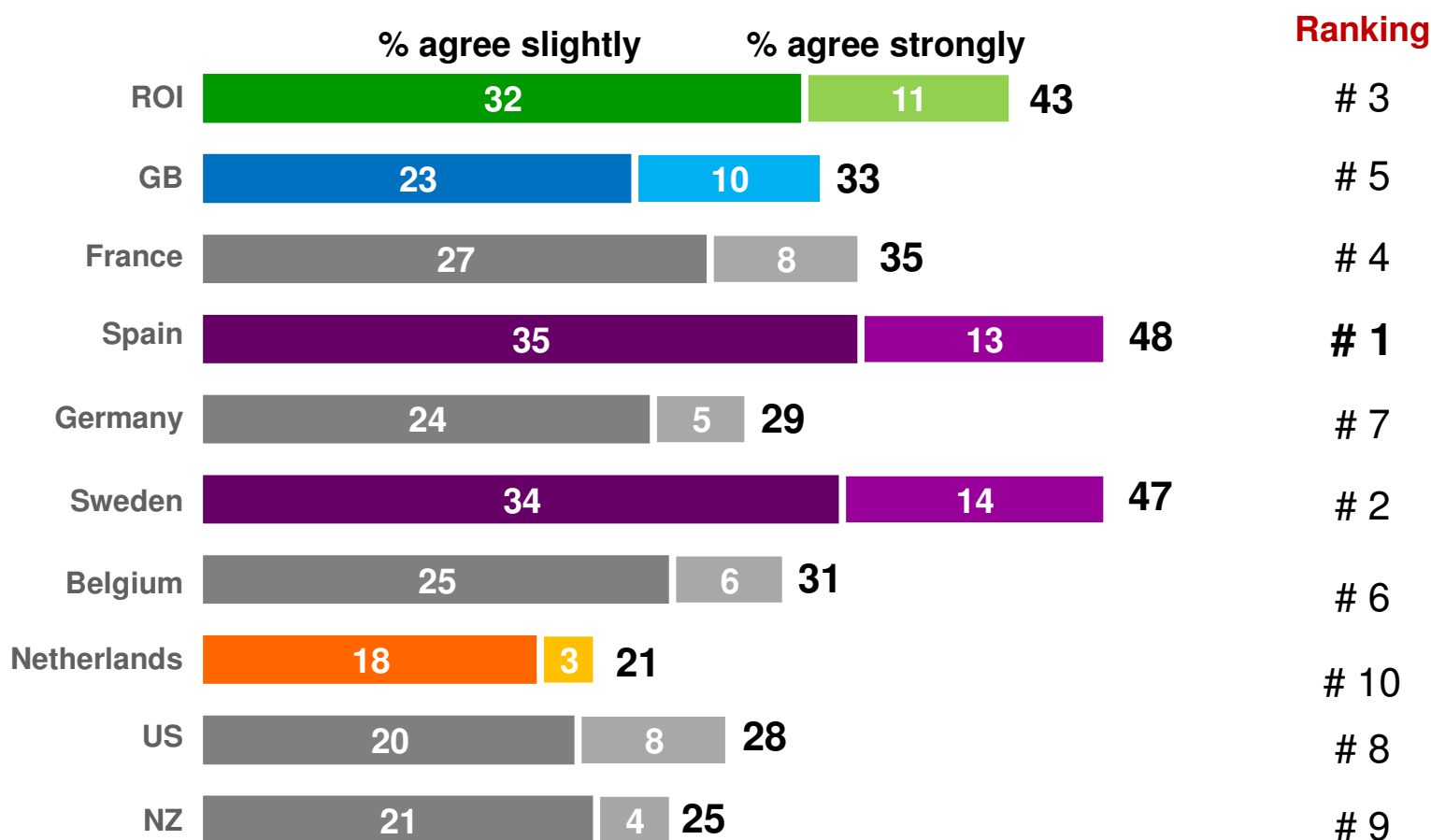
I most often go to the same store but look for the best value for money I can get



Willingness to pay more for better customer service is relatively low in all countries, though Spain, Sweden & ROI display the highest willingness to pay extra for service.

42

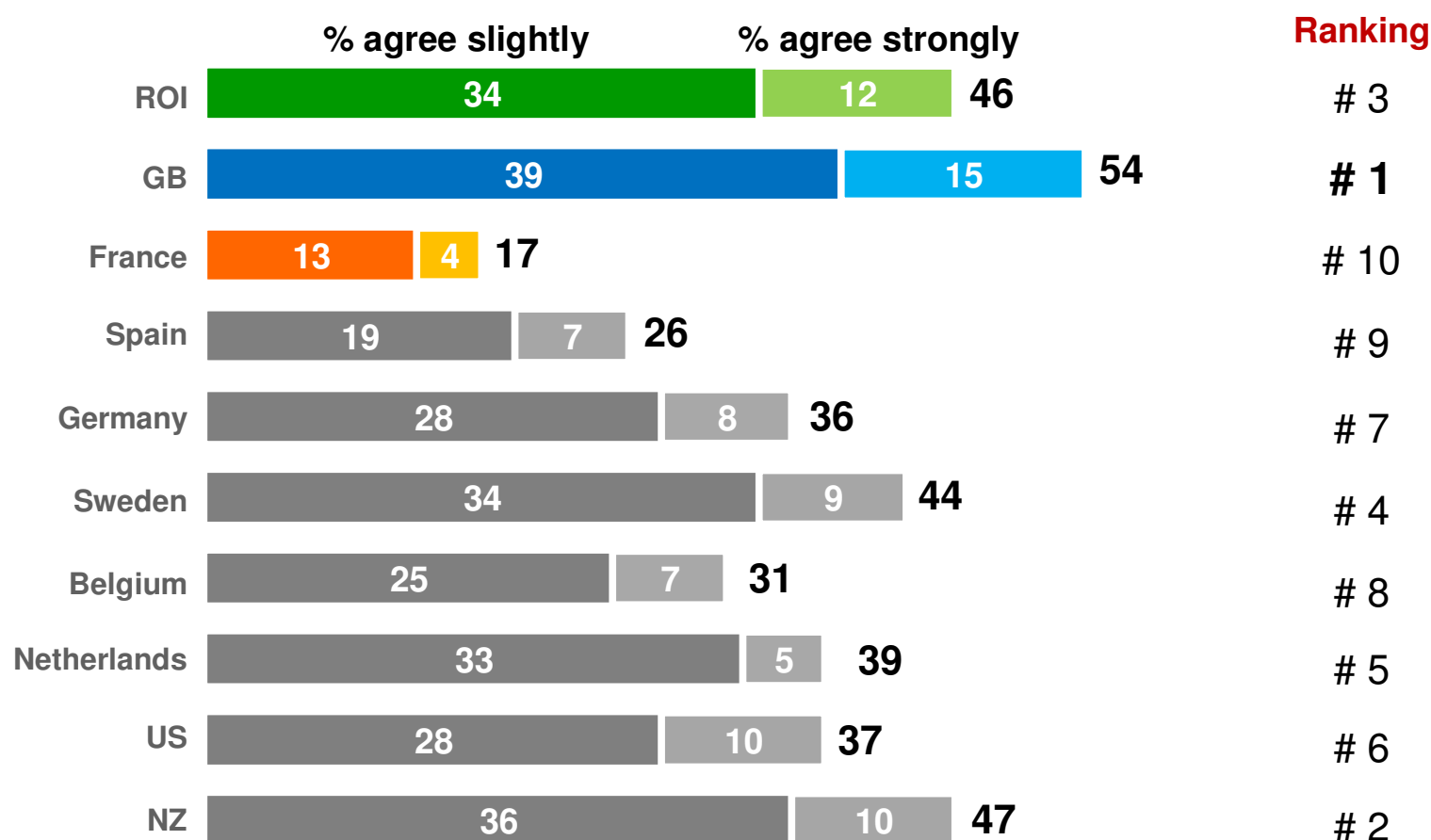
I will pay a bit more for grocery shopping to get superior customer service



The French are least likely to buy on impulse. GB are the most impulsive grocery shoppers, followed by NZ, ROI and Sweden.

43

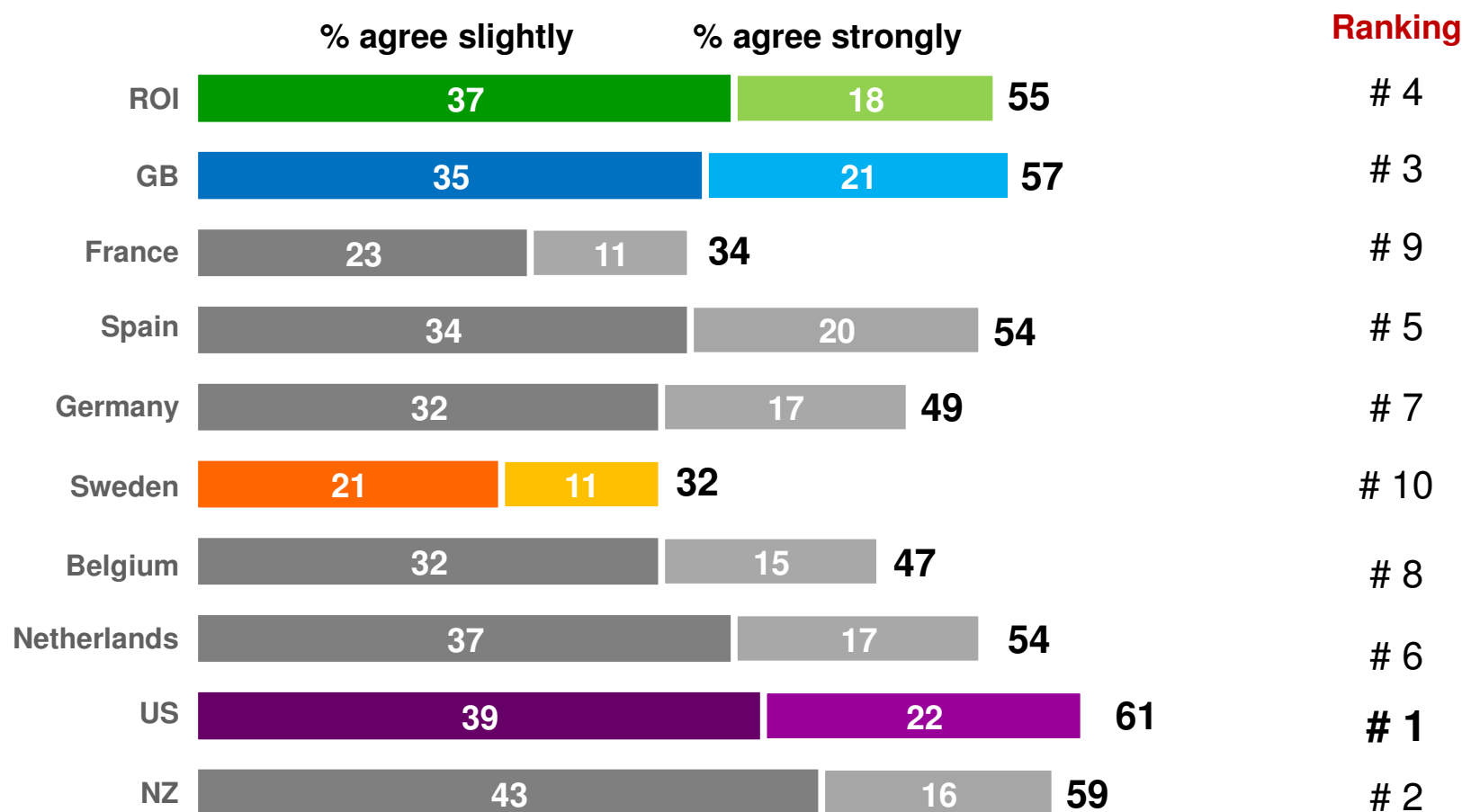
I tend to buy on impulse if I think products are cheap



The US are the most content when it comes to spending time looking for a bargain. Sweden and France on the other hand show very low willingness to do so.

44

I don't mind spending time looking for a bargain

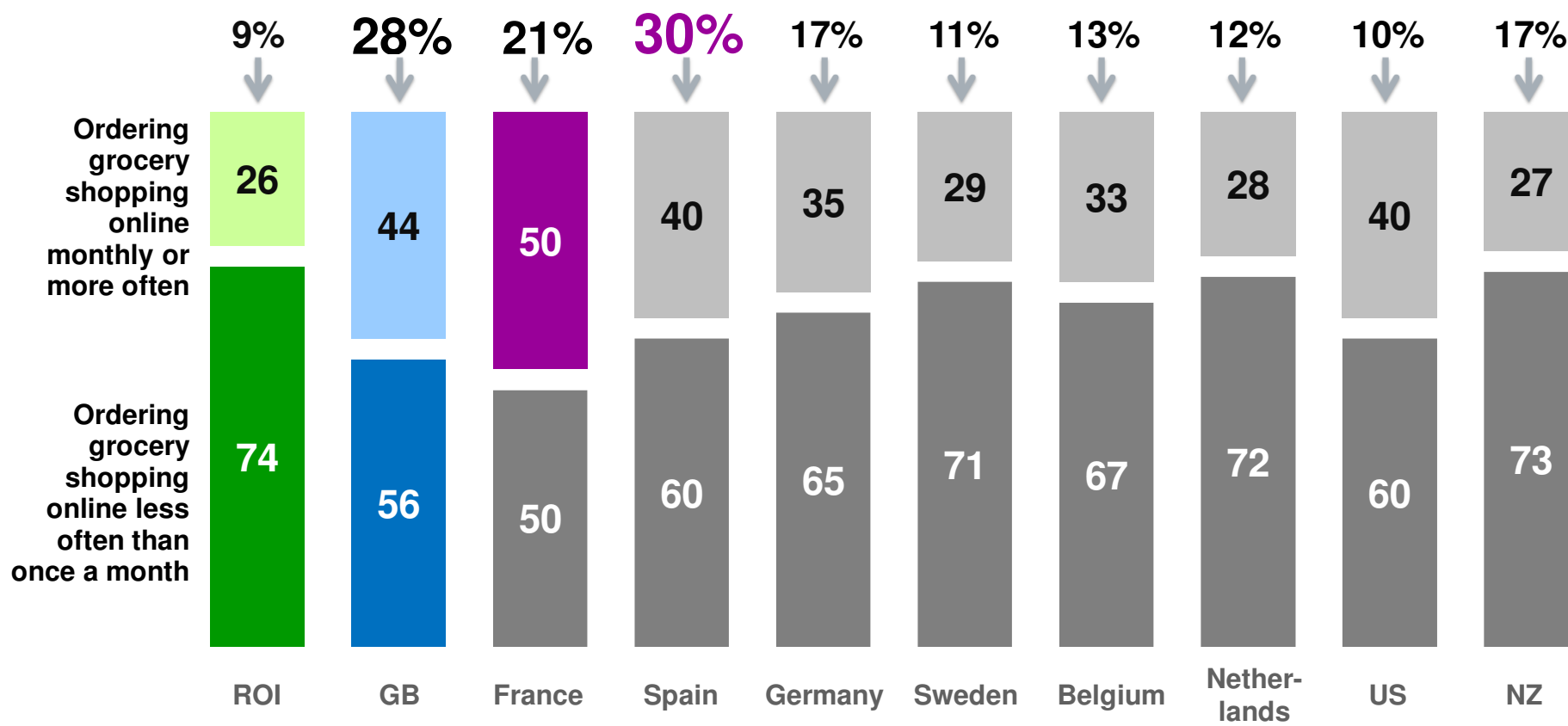


Spain has the highest proportion of online grocery shoppers. France, however, order their grocery shopping online more frequently than any other country.

45



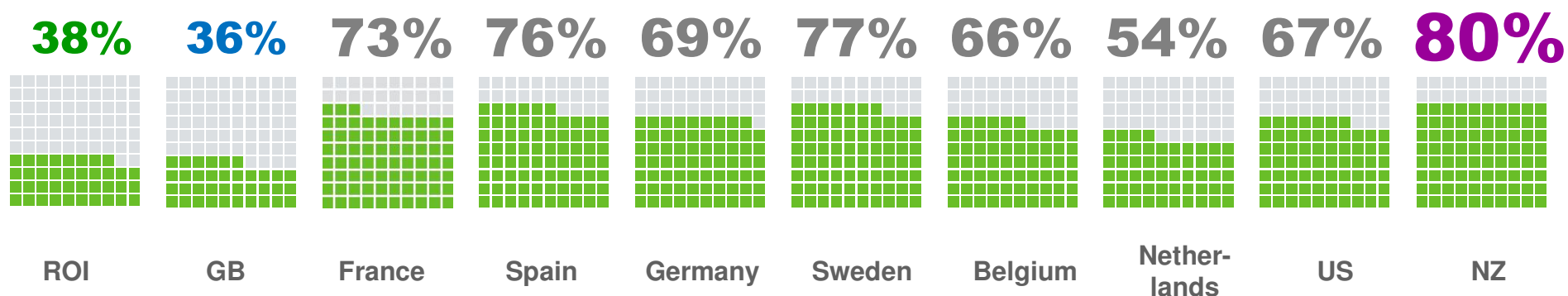
% ever ordered grocery shopping online



ROI & GB have low reported incidence of using the internet to download a recipe while NZ has the highest.

46

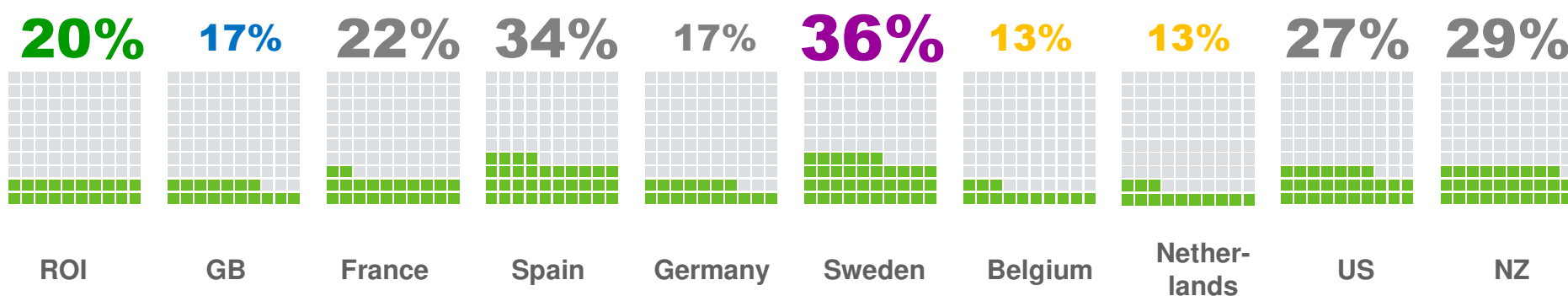
% ever downloaded a recipe



Downloading Food Apps is still a minority behaviour but is most popular in Sweden & Spain.

47

% ever downloaded a food app



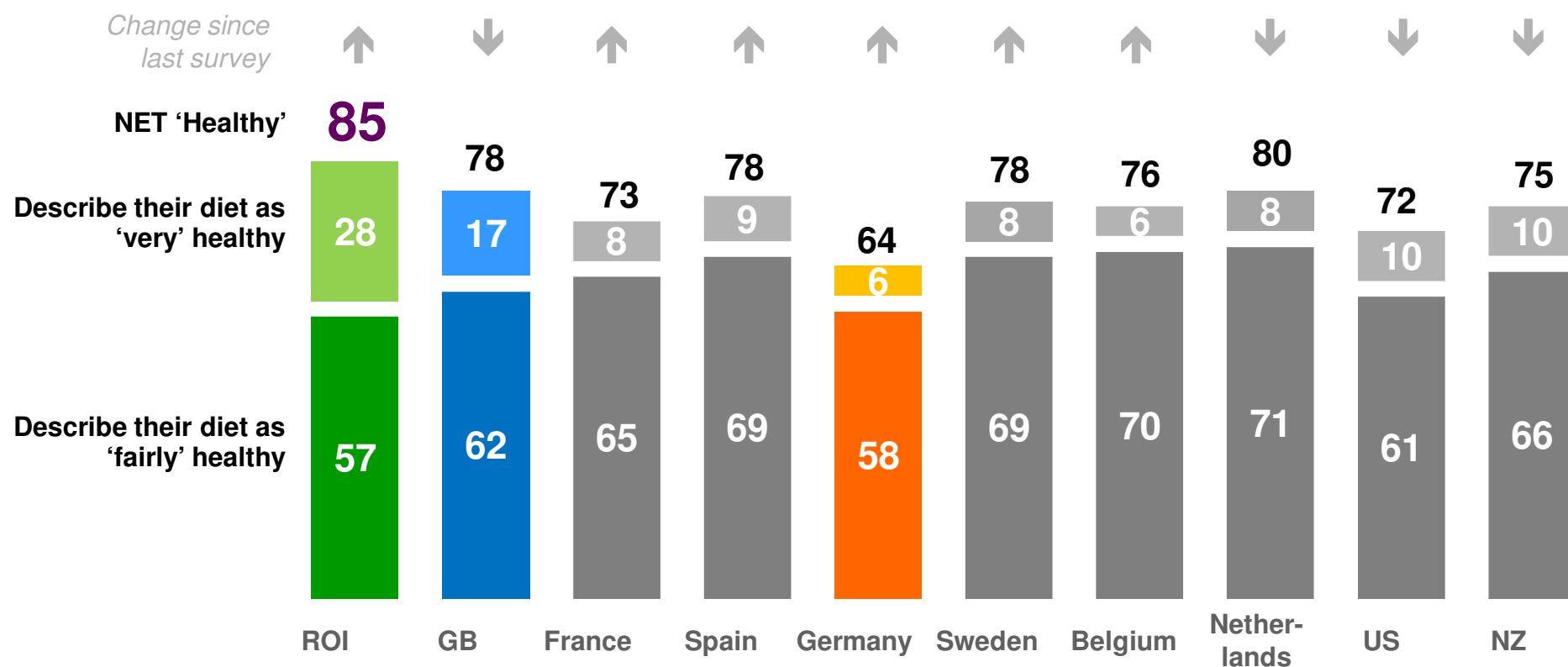
Health & Wellbeing



ROI considers itself to be the most healthy country compared to others surveyed. Most countries are unwilling to describe their diet as 'very' healthy.

49

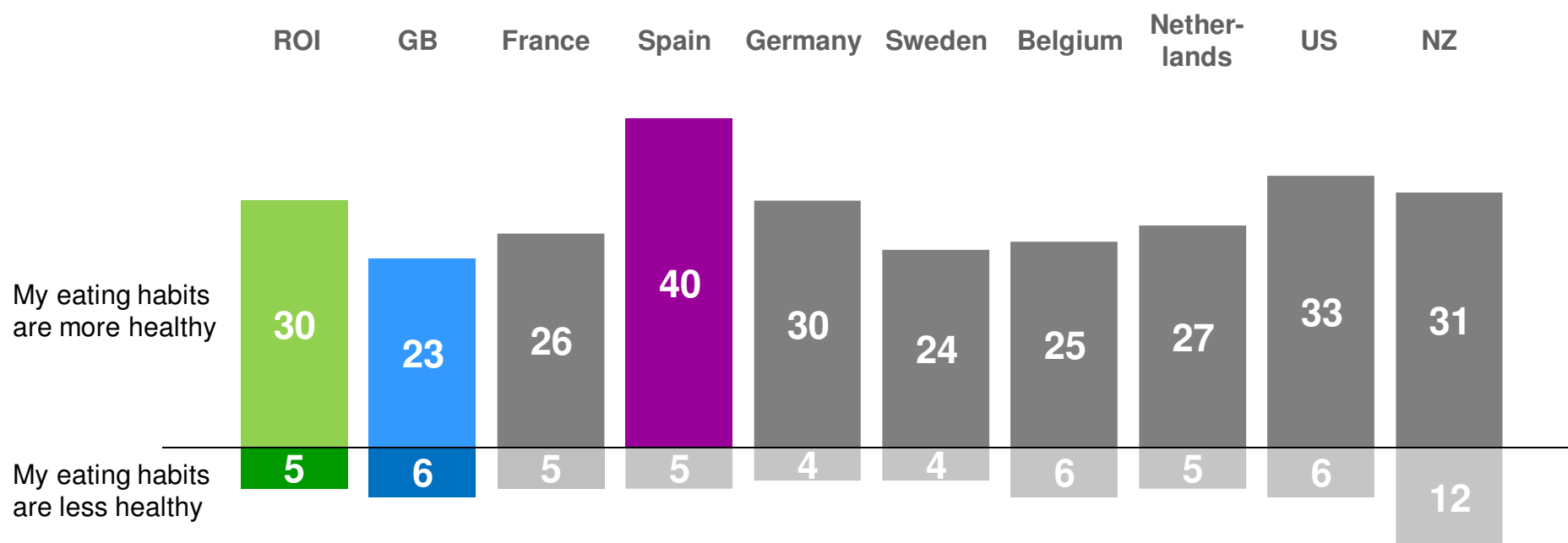
Diet Perceptions in each country



Spain is most positive that its eating habits are healthier than before. New Zealand ranks highest in terms of less healthy behaviours.

50

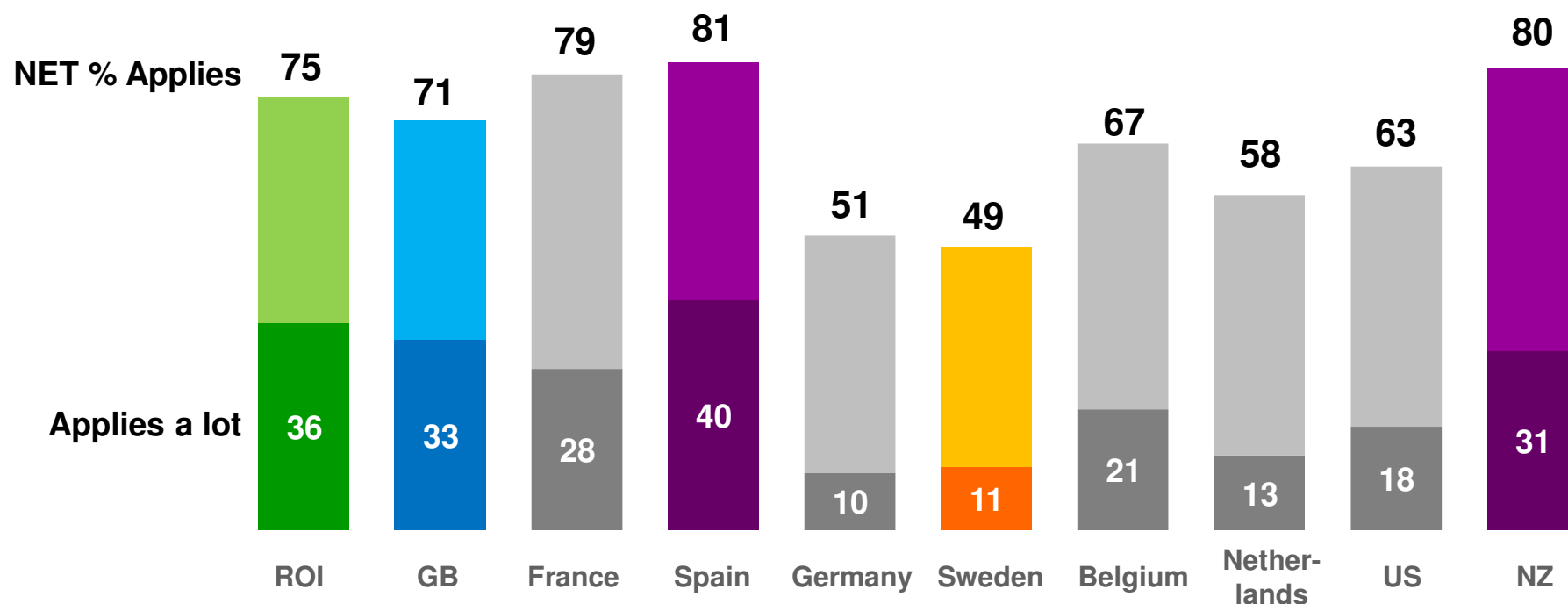
Changes in eating habits in last 12 months



Spain and NZ display strong support for the '5 a day' concept. Sweden and Germany seem less convinced that such an approach should dominate diet.

51

% agree... 'I eat at least 5 portions of fruit and veg every day'



Dairy products and fruit and vegetables remain core dietary components across all countries. The inclusion of high-fibre foods in diets is less popular in comparison.

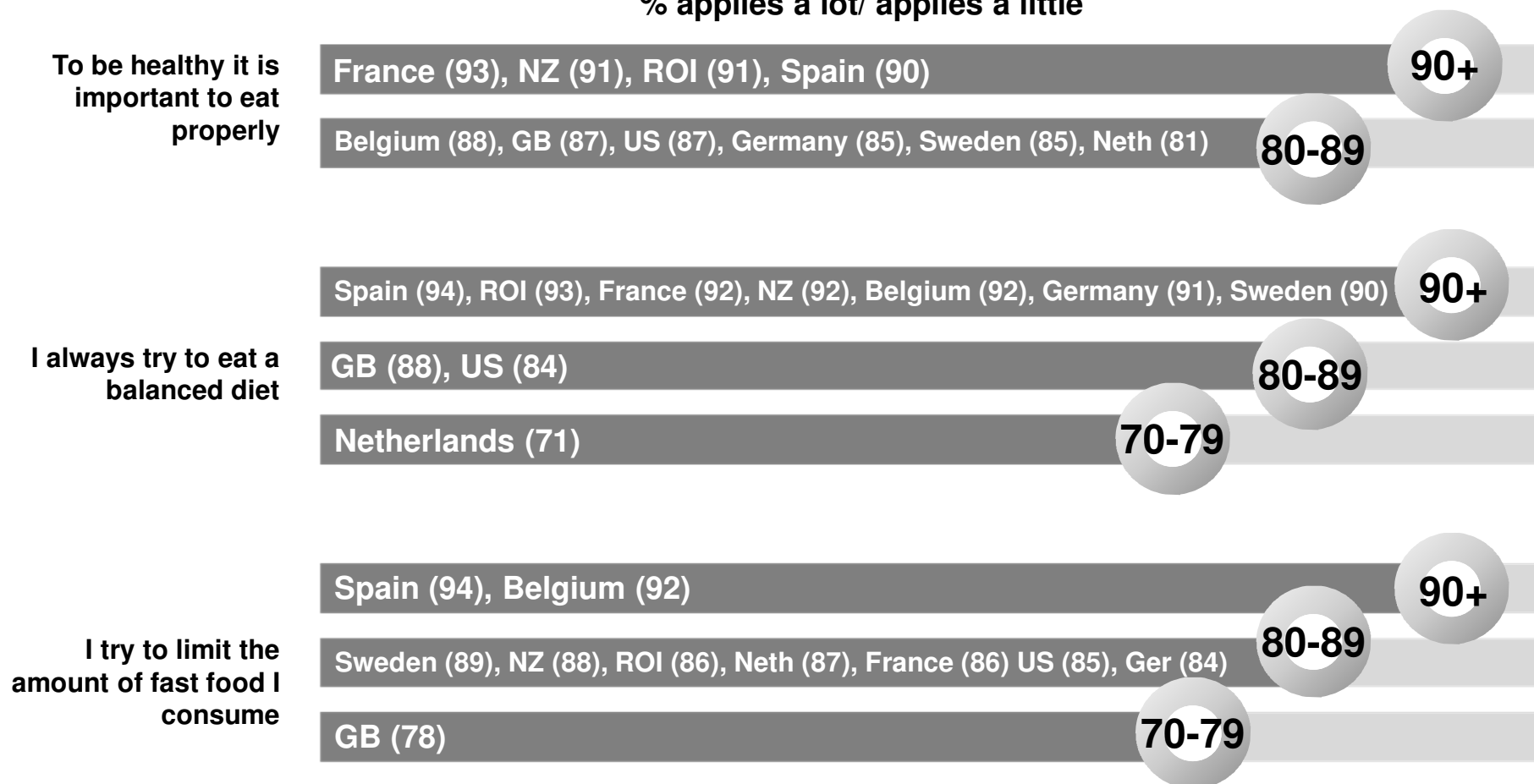
52



Efforts to eat properly, have a balanced diet and limit fast food intake are high in all countries. However, the Netherlands and GB show signs of a slightly less healthy attitude.

53

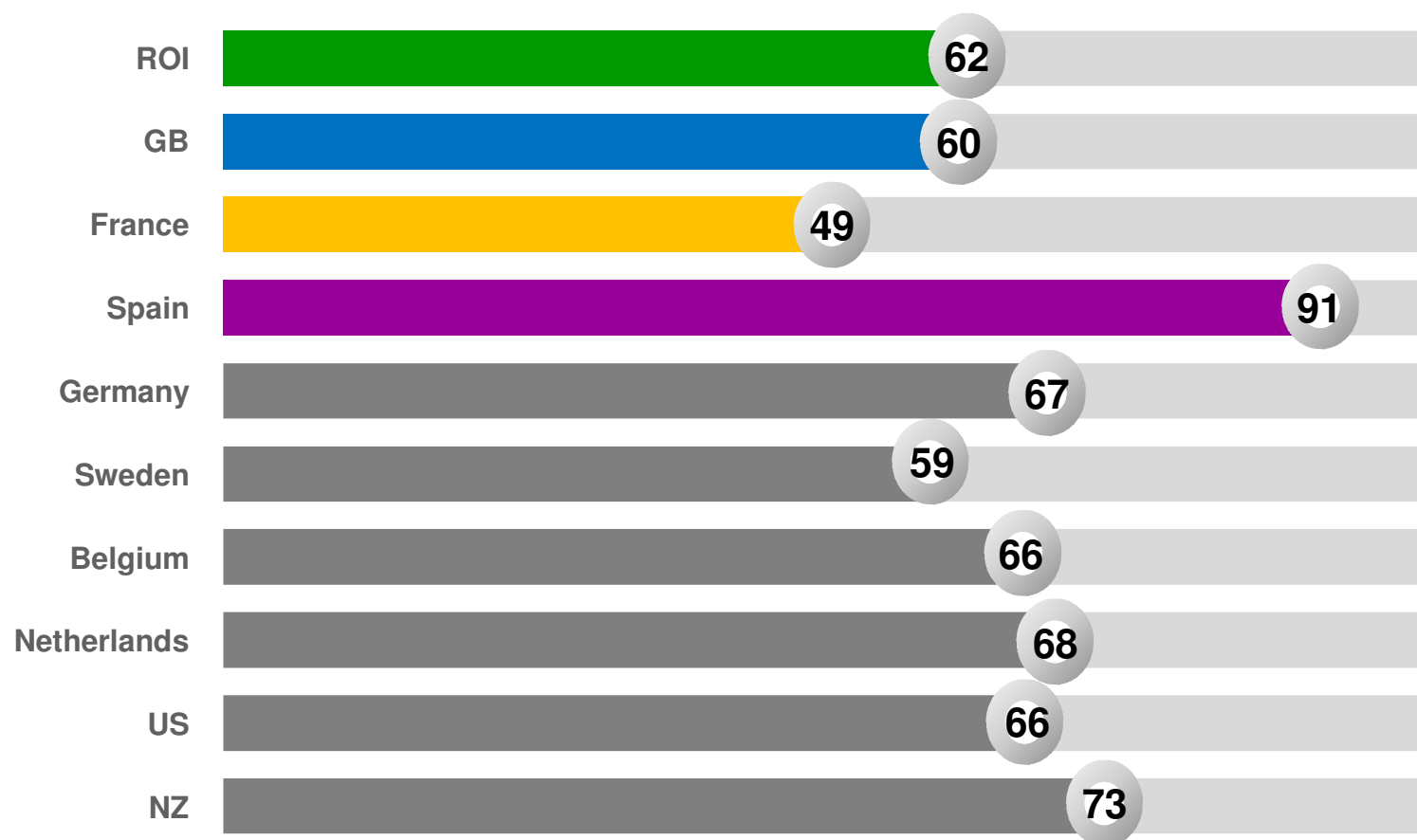
% applies a lot/ applies a little



Looking for low fat options when shopping for food products remains relatively high in all countries, though this behaviour represents less than half of French adults.

54

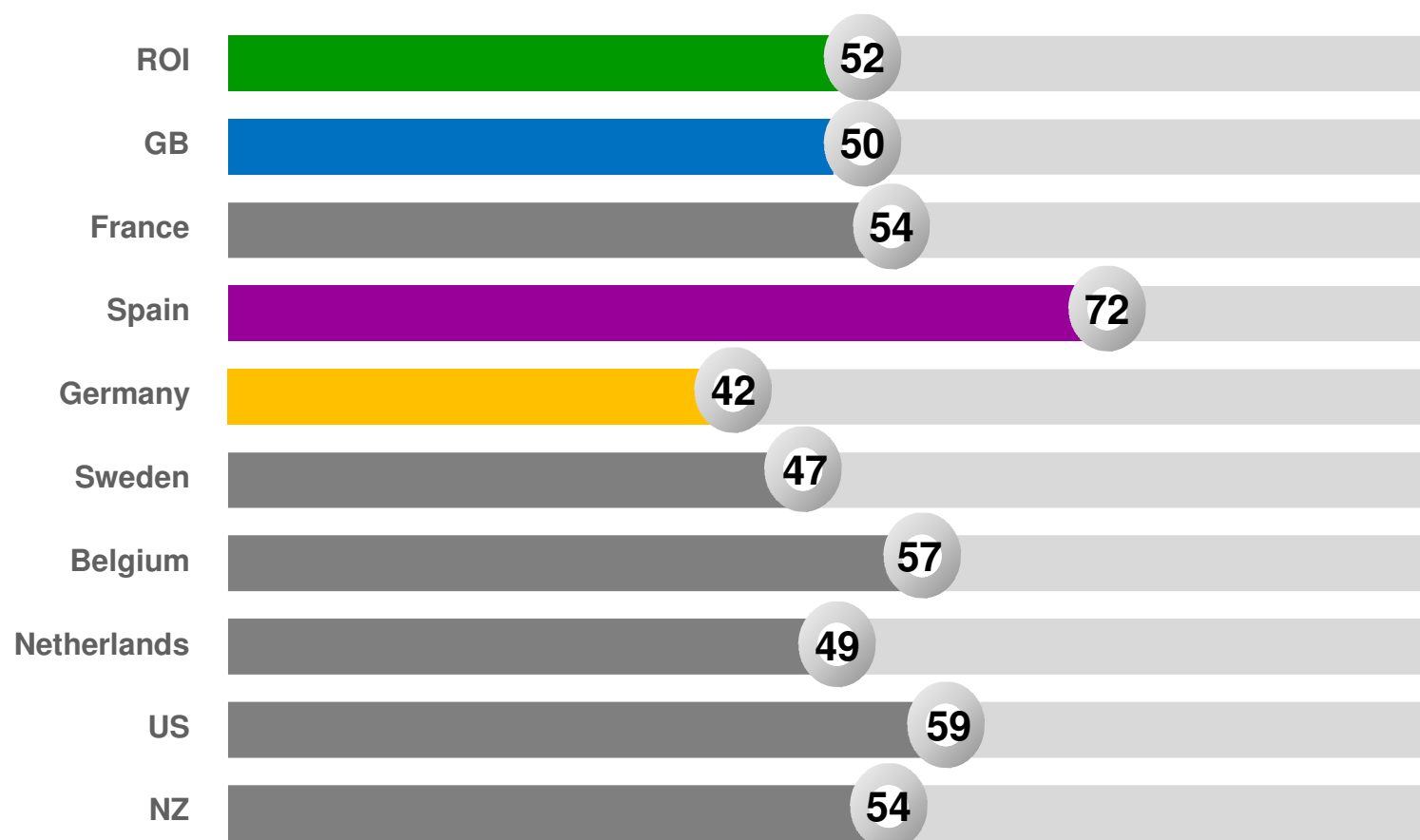
% agree that 'always look for low fat options when buying food products'



Calories in the food that is eaten matter much more to the Spanish than any other country. Germany tends to think of calories the least.

55

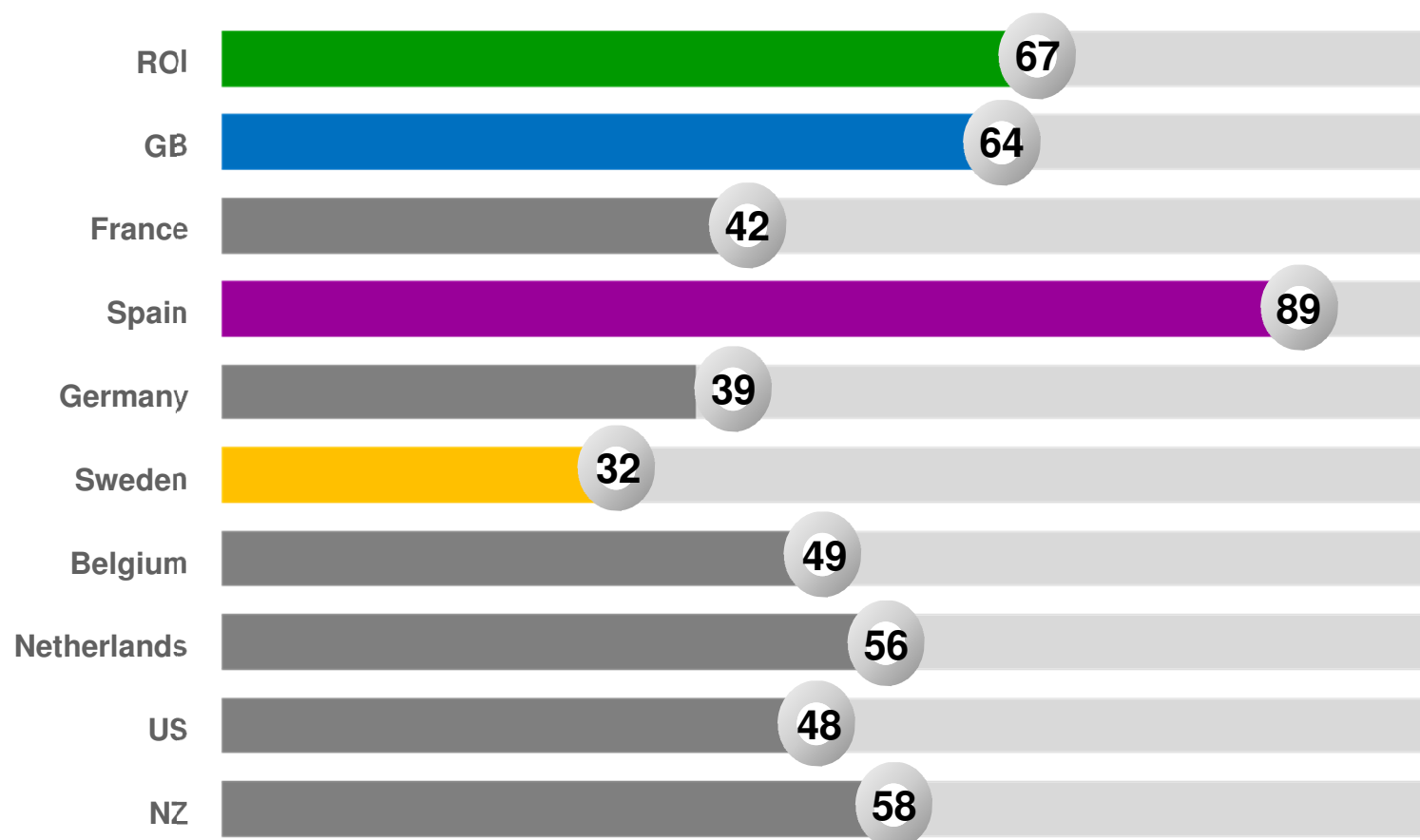
% agree that they... *'always think of the calories in what they eat'*



Not all countries are convinced that low fat translates into the healthy choice. However, Spain, ROI and GB are more likely than others to agree with this summation.

56

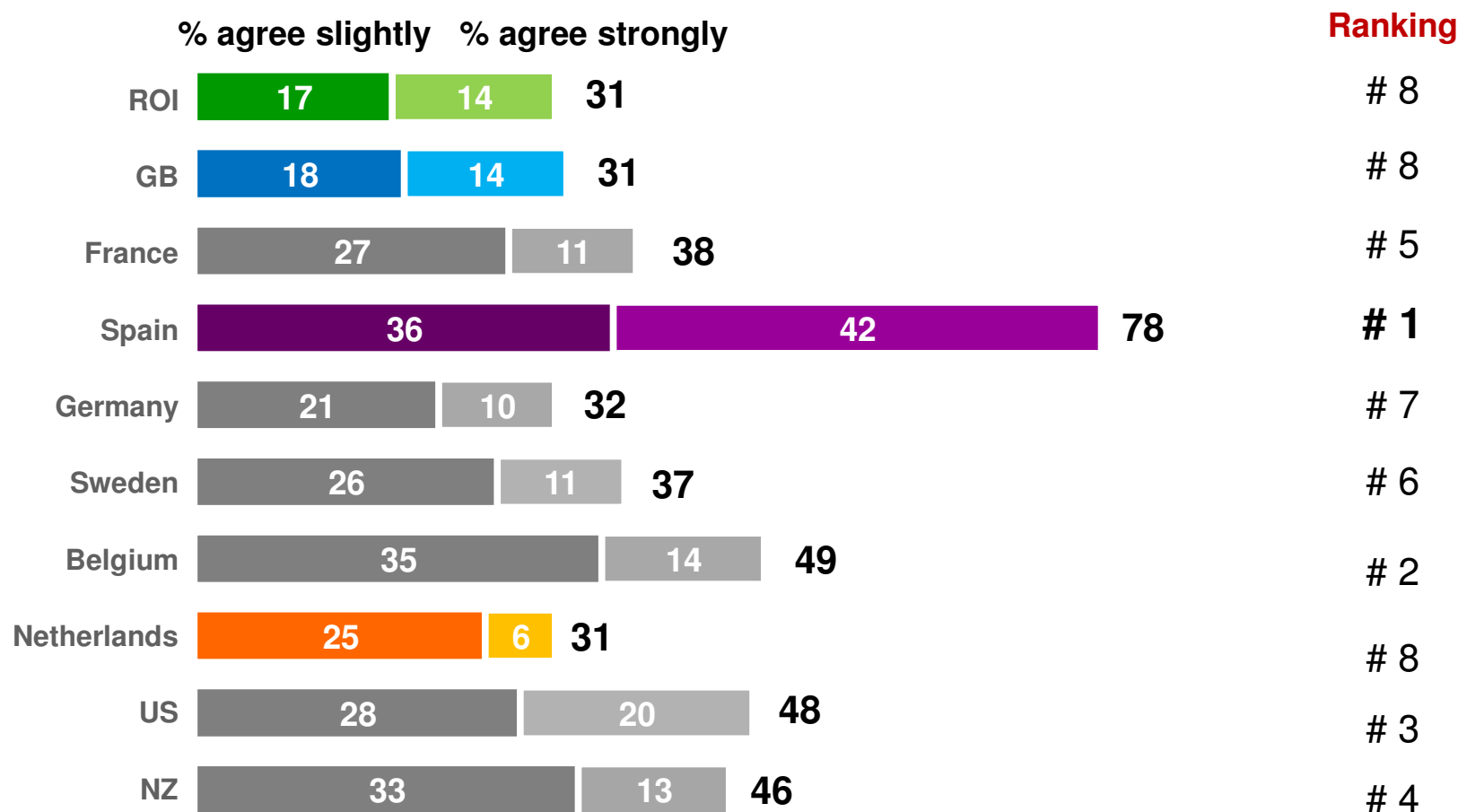
% agree that ... *'if a label says 'low fat/ 'reduced fat' then the product will always be the healthy choice'*



The Spanish have considerably high concerns about their children becoming obese. The Dutch, British and Irish express the least concern.

57

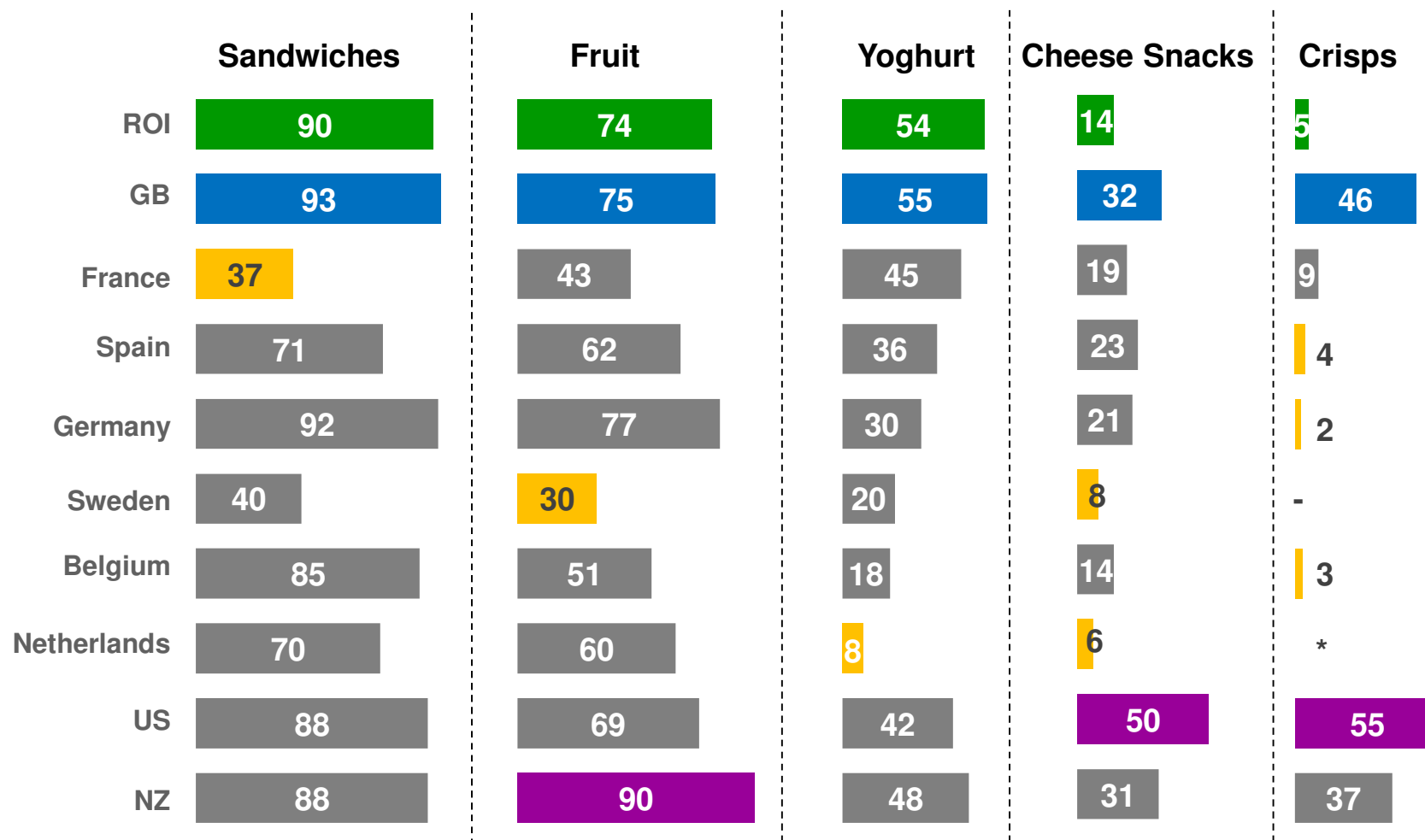
I am concerned about my children becoming obese



Across most countries, sandwiches and fruit are popular in children's lunchboxes. The inclusion of yoghurt, cheese snacks and crisps vary considerably across regions.

58

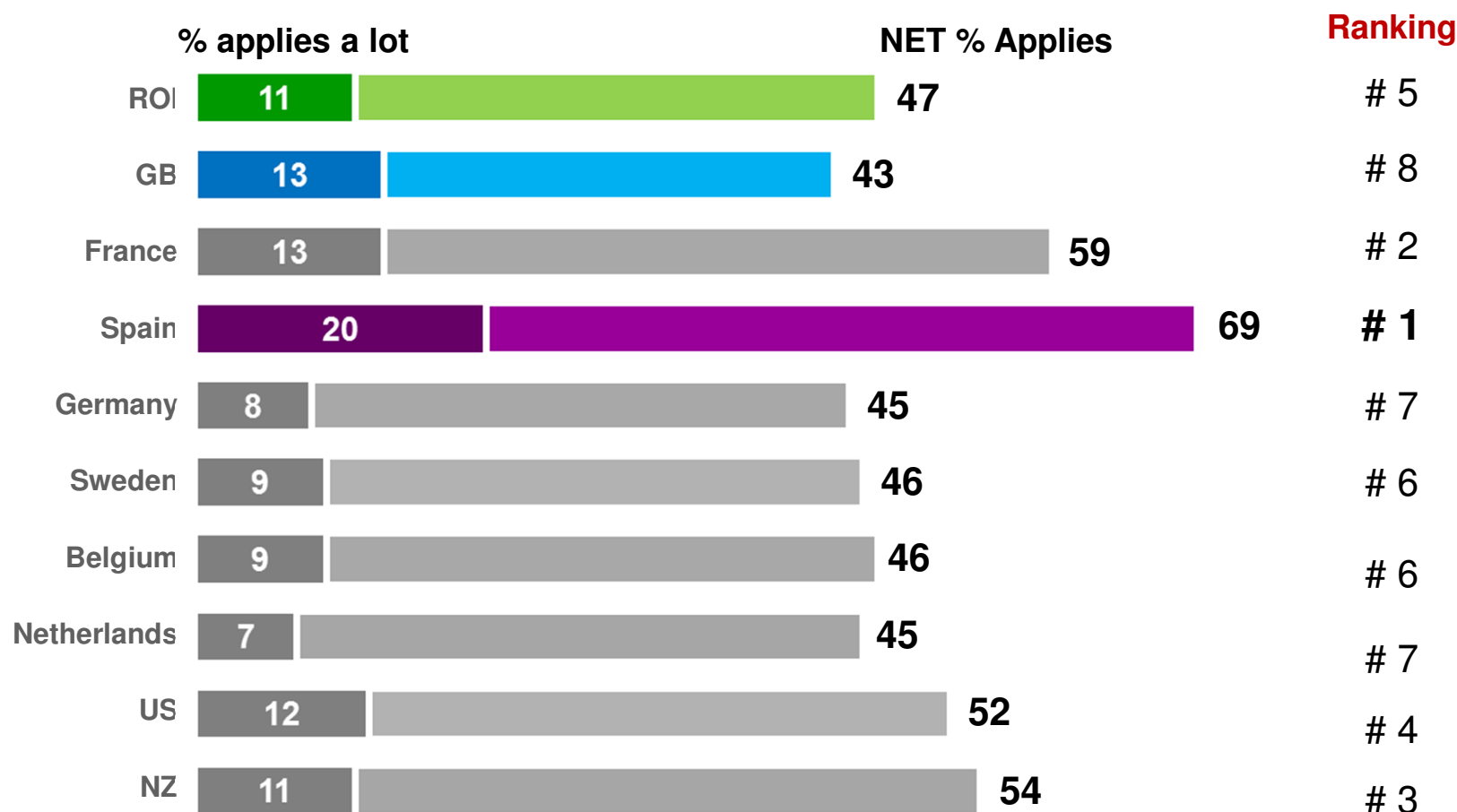
Content of kids' lunchboxes



The Spanish are more likely than other countries to consider health food to be boring. This resonates less so in GB, Germany, Netherlands, Sweden and Belgium.

59

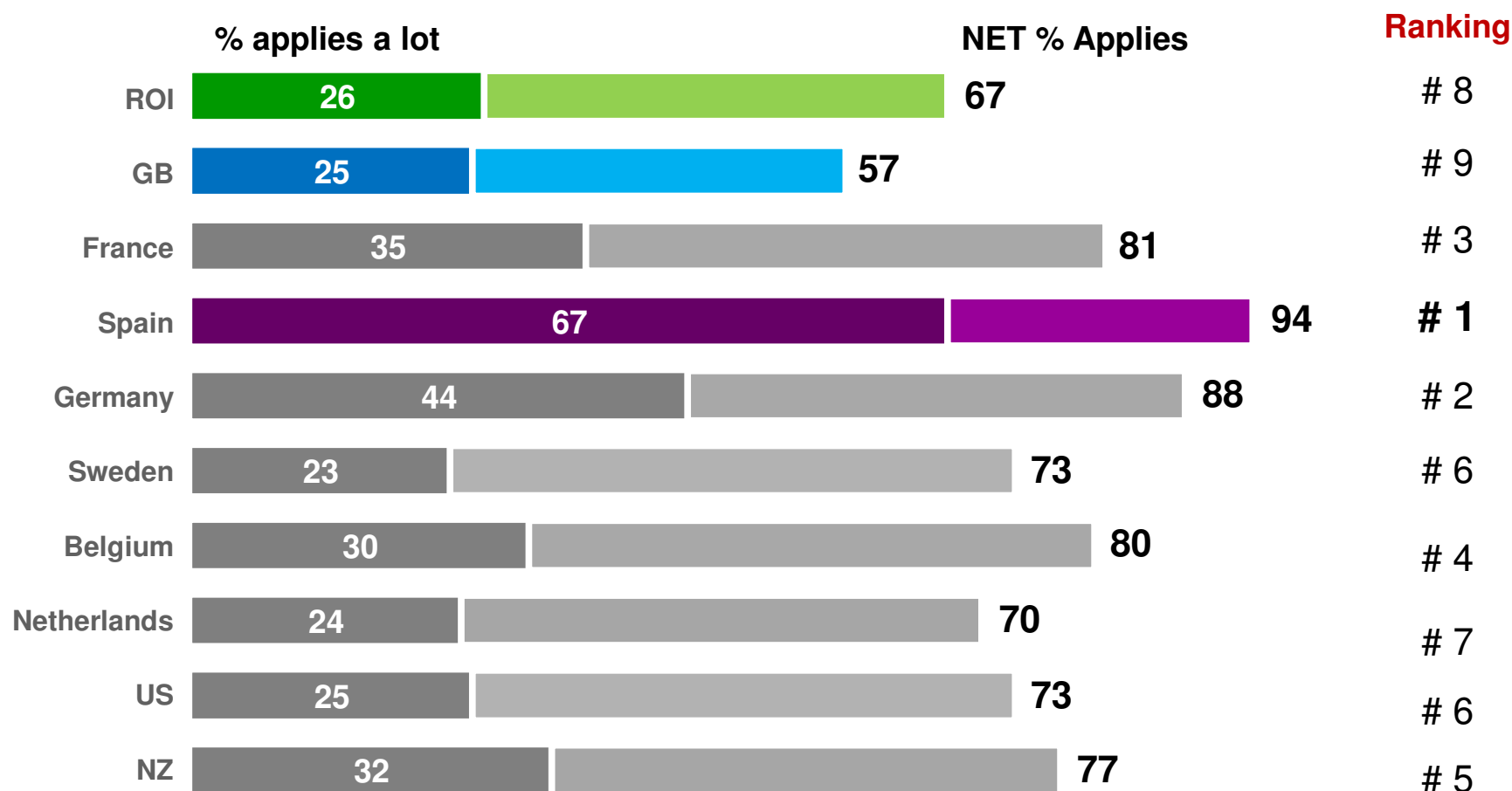
Choosing healthy food to eat is limiting and boring



ROI and GB are much less likely than other countries to want manufacturers to help them to eat healthy.

60

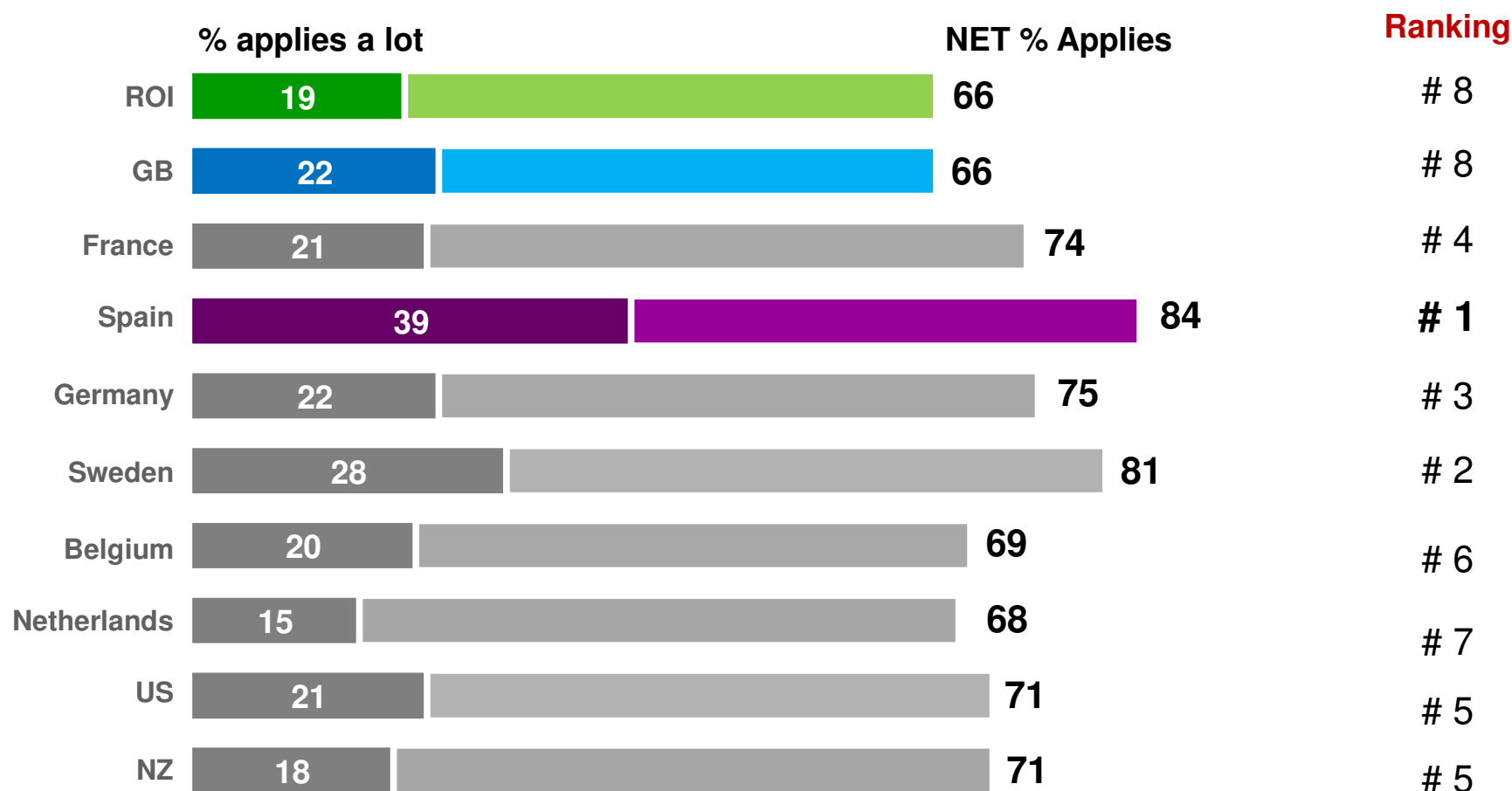
I would like manufacturers to help me to eat healthy



Across all countries there is a general willingness to pay more for healthy foods, however, compared to other countries, this willingness is lowest in ROI and GB.

61

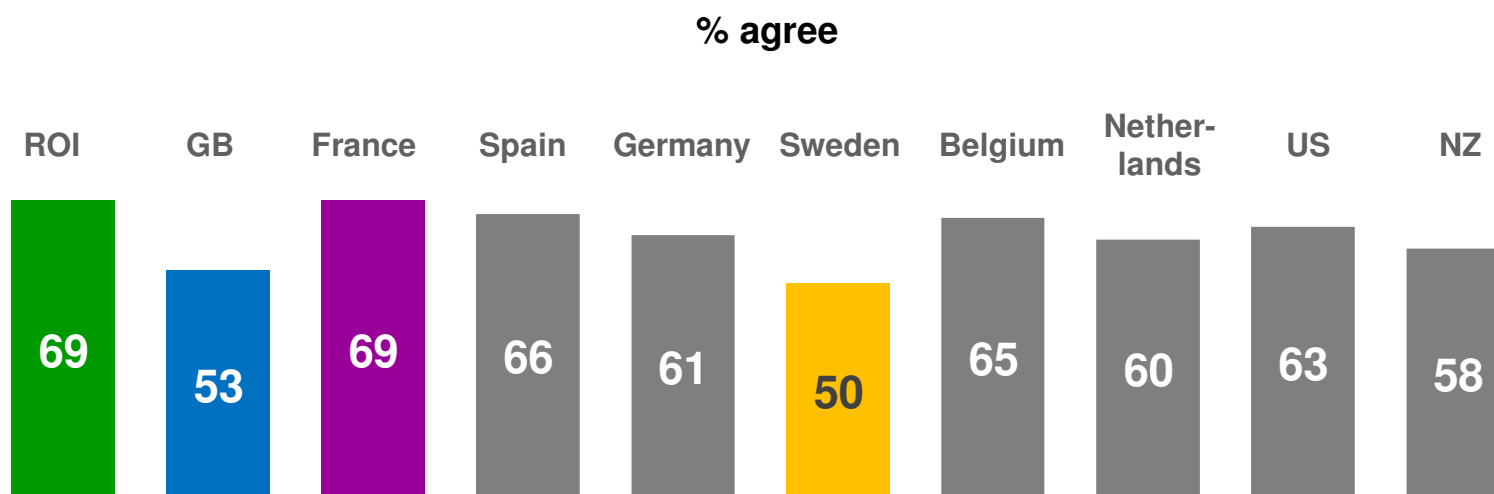
I am willing to pay more for healthy foods & beverages (as long as they taste good)



Taking control of one's life by eating healthy is most popular in ROI & France whilst it is least popular in Sweden.

62

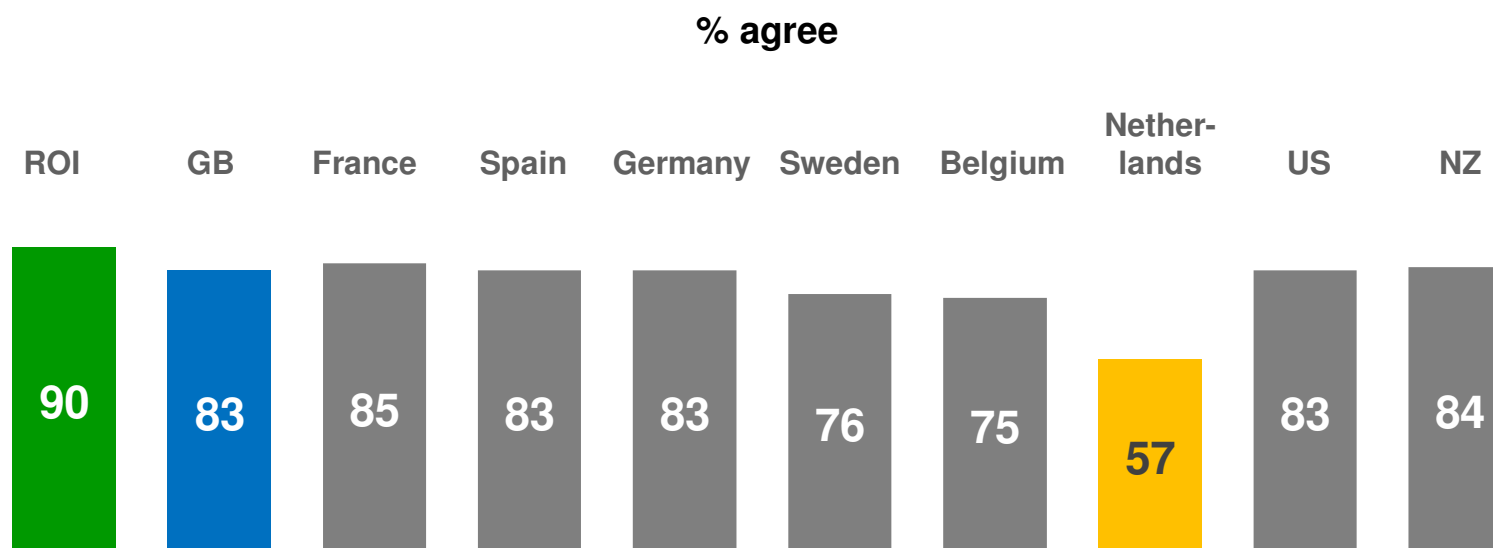
I eat healthy to take control of my life



ROI appears most convinced of how food can impact positively upon mental health and wellbeing. The Netherlands are considerably less convinced in comparison.

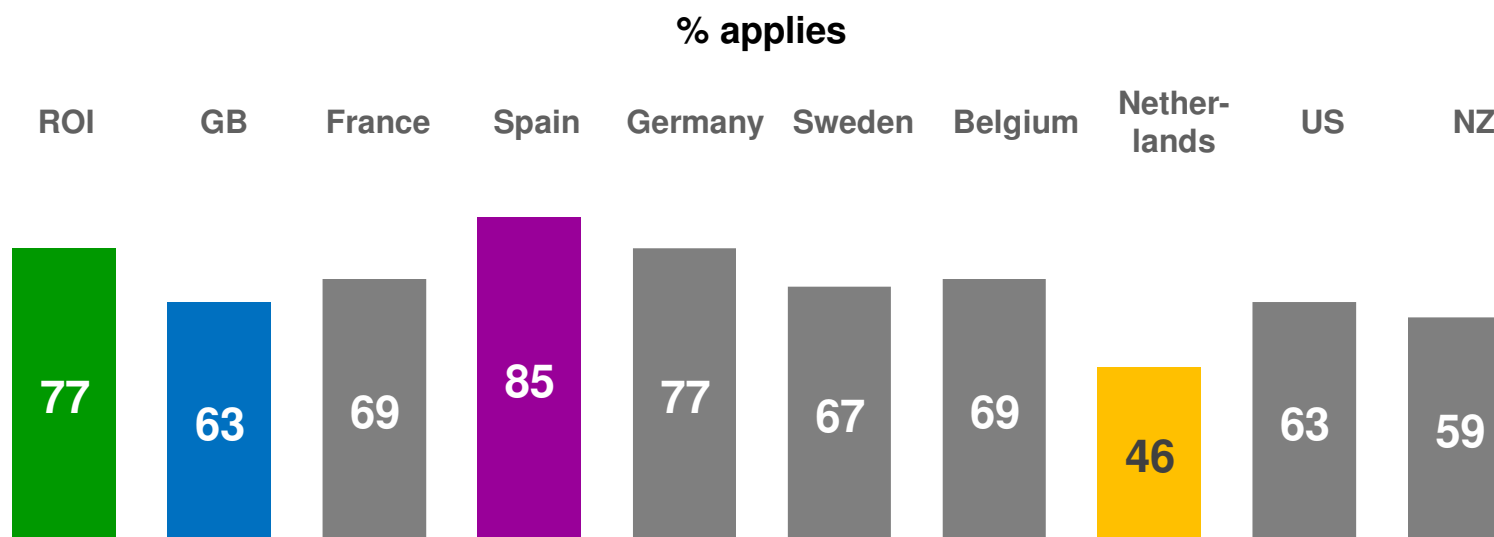
63

A good diet can help mental health



Eating to enhance mental alertness on the other hand is a particularly popular concept in Spain. The Netherlands on the other hand fail to connect with this concept. ⁶⁴

I eat to enhance mental alertness and spiritual wellbeing

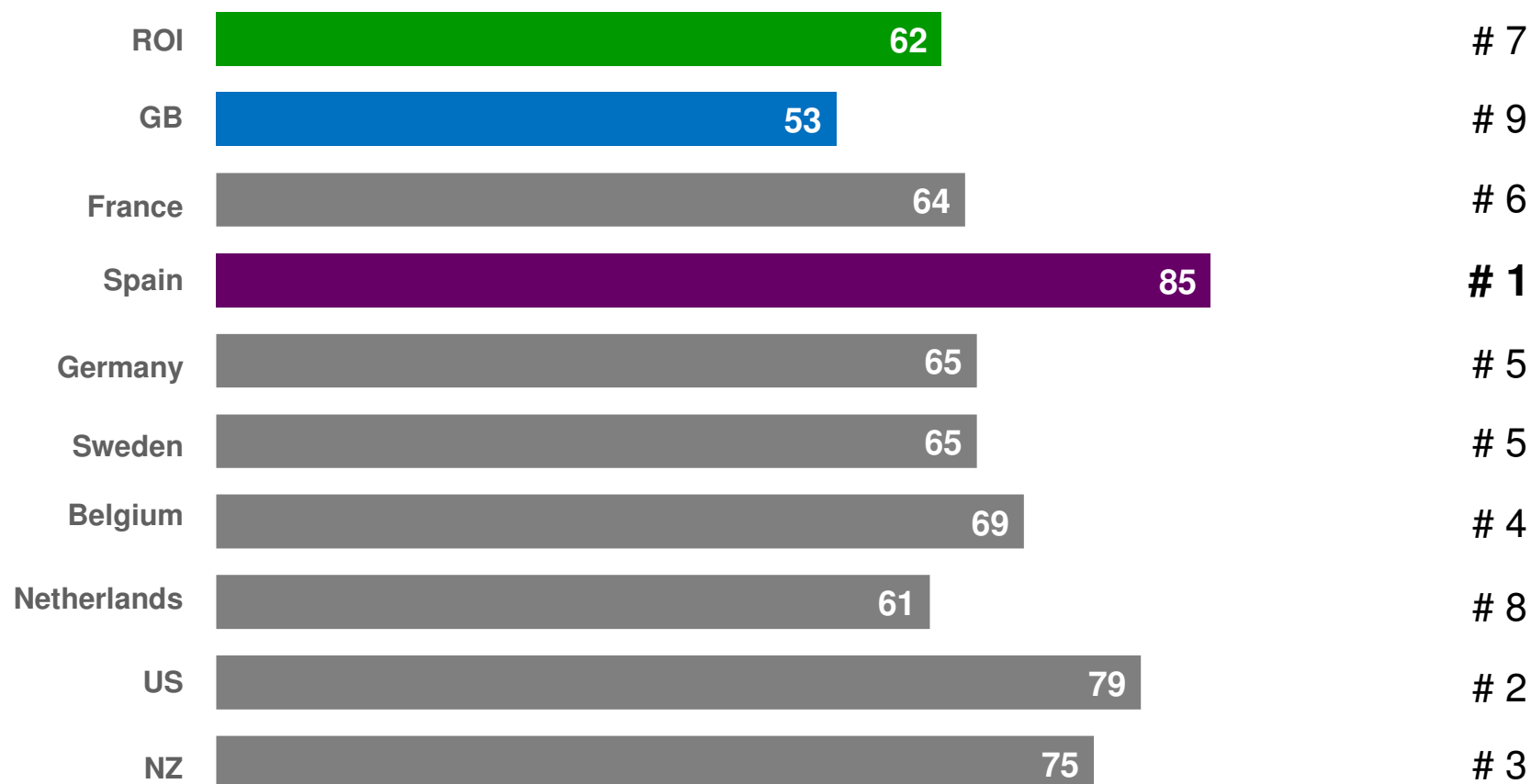


Despite a lack of claimed understanding, the Spanish have the highest proportion who always check nutritional labelling on food. GB check this information the least.

65

% applies that they 'always check the nutritional labelling on food before buying them'

Ranking

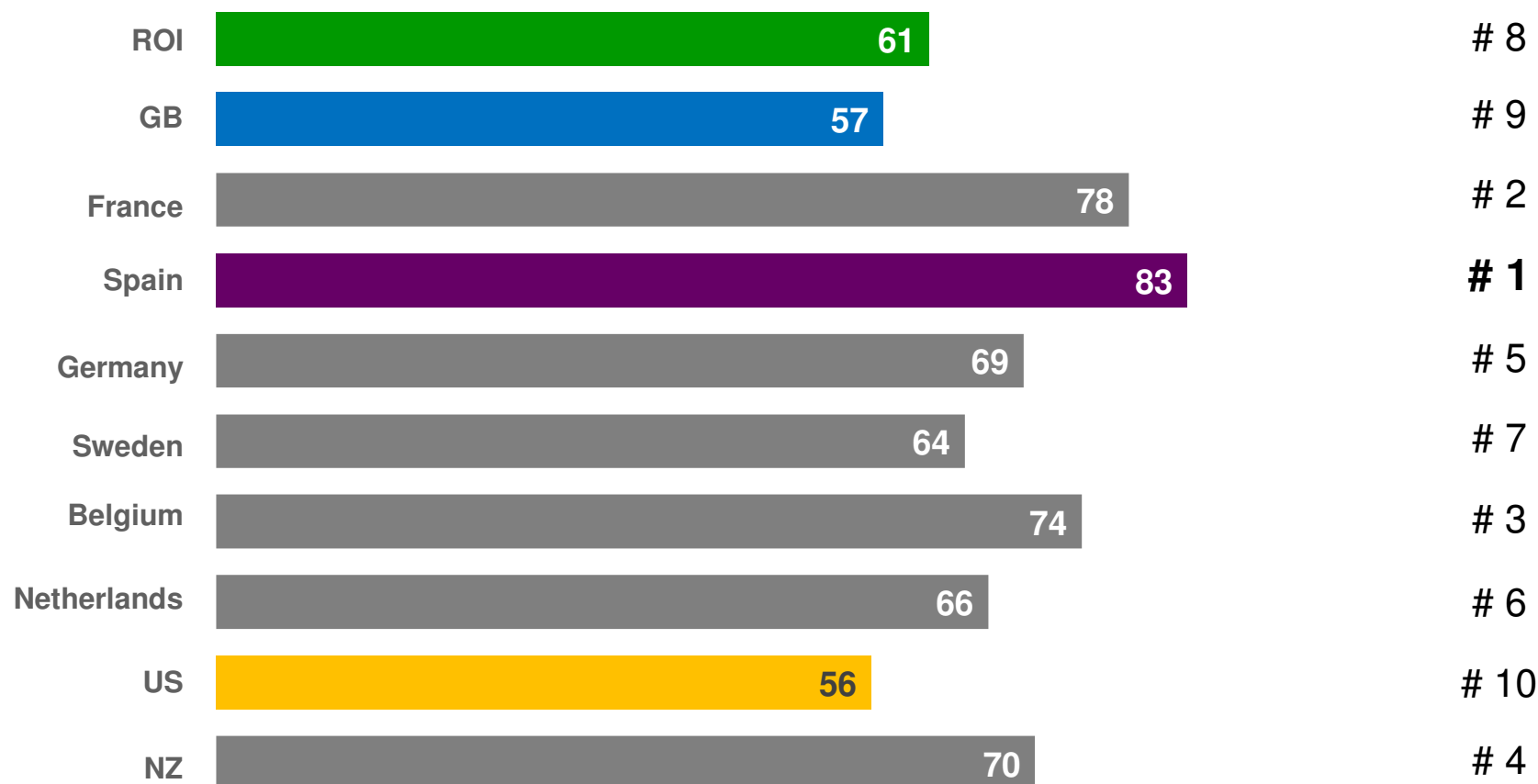


While GB and US claim to have the least difficulty understanding nutritional claims on packaging, Spain claims to have the most difficulty.

66

% applies that they 'often find it difficult to understand nutritional claims on packaging'

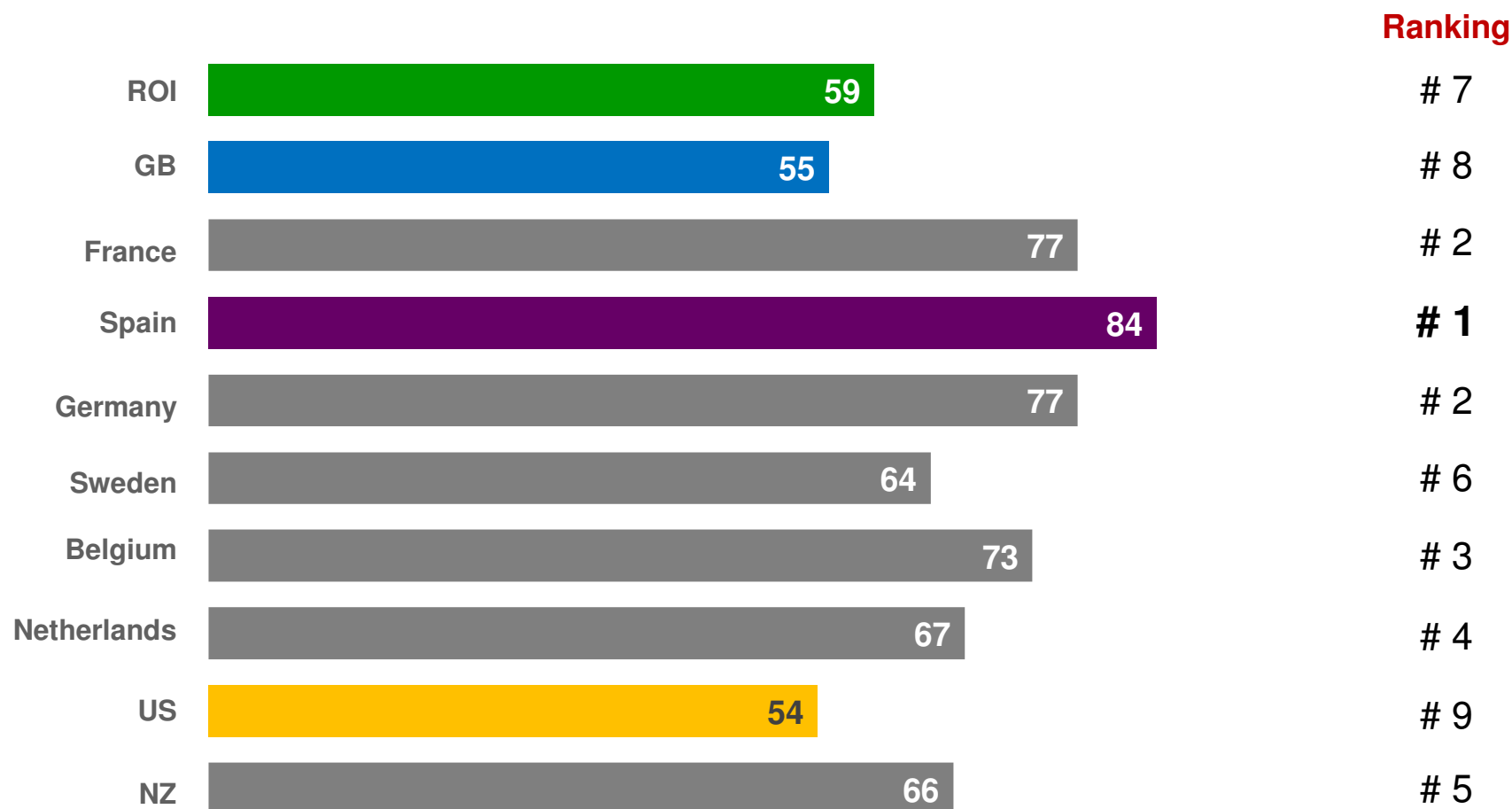
Ranking



The Spanish also struggle the most to understand general food labelling. However, the majority of adults in all countries admit to having some difficulty.

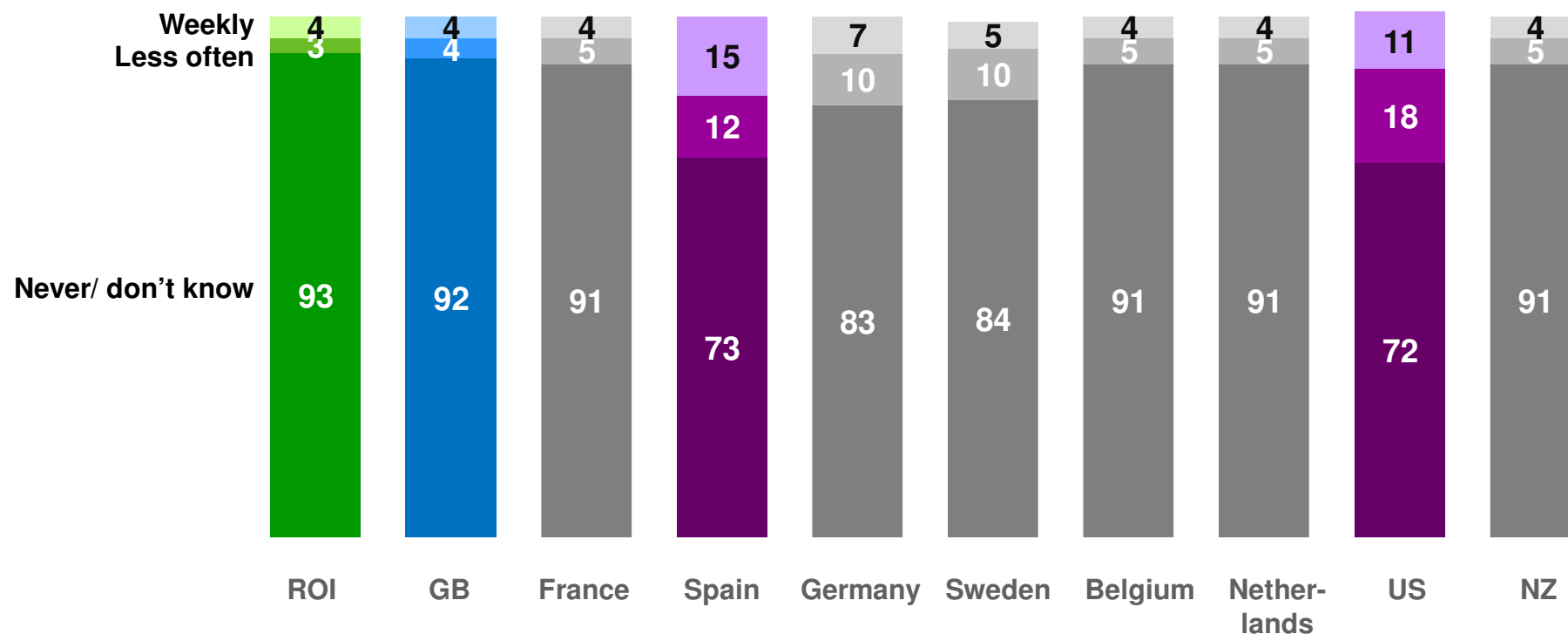
67

% applies that they 'often find it difficult to understand labelling on food'



In 6 of the 10 countries surveyed more than 90% claim to have never/ not knowingly purchased gluten free products. Purchases of Gluten Free are highest in Spain & the US.⁶⁸

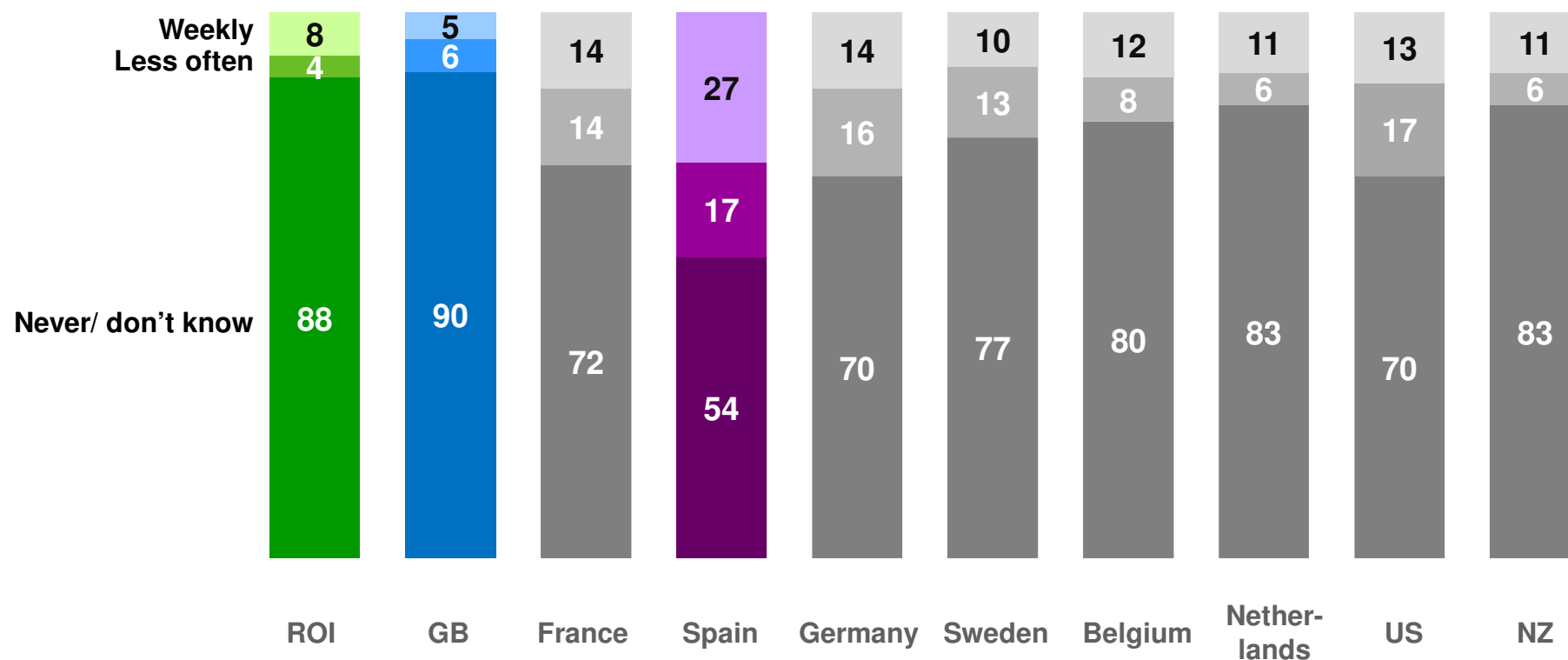
Frequency of purchase of Gluten Free products



Spain has the largest proportion of grocery shoppers buying 'Free From' food products while ROI & GB has the smallest.

69

Frequency of purchase of 'Free From' products



TAKEAWAYS



1

Food underpins positive shifts in lifestyle

- Confidence & enjoyment are high
- More people embracing scratch cooking
- People are entertaining more



#2

People are still busy

- Convenience still highly valued
- Look to resolve need for speed / ease of preparation with making good choices
- Want healthier options



#3

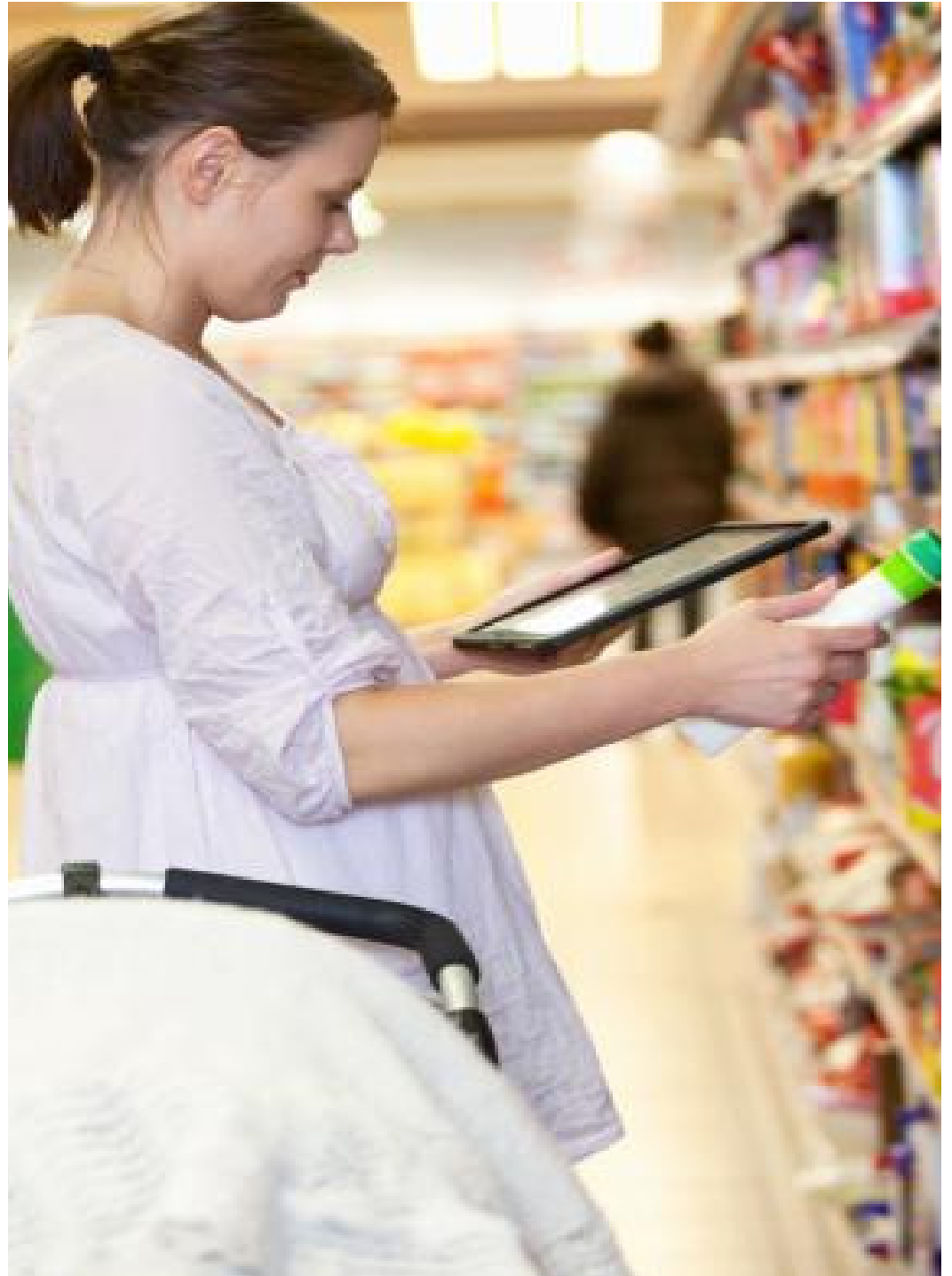
Health remains top priority

- Strong desire /aspiration to eat healthy
- Seeking out healthy options
- Seeking help from manufactures
- Physical & mental wellbeing



#4 Shopping has changed

- Price remains priority
- But a more discerning and savvy approach and understanding of what constitutes good value
- Online shopping for food remains low but growing
- Using technology more for recipes and inspiration and choice



#5

Back to basics

- People want to know the source of their food
- Want greater transparency
- Local has become a byword for quality and trustworthiness



#6 Sustainability

- Awareness of food terminology growing
- Environment important but less of a driver in current climate



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Consumers & Their Food An Insight into 10 Markets



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board