

# PERIscope2013



## **French** **Consumers & Their Food**



## Introduction

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- PERIscope 2013 explores consumer behaviours & attitudes towards food, shopping and cooking.
- Online survey conducted amongst 1,000 adults aged 18+ in France.
- Results are also available across nine other countries.
- 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](http://www.bordbia.ie) or email [info@bordbia.ie](mailto:info@bordbia.ie)

# A Foodie World

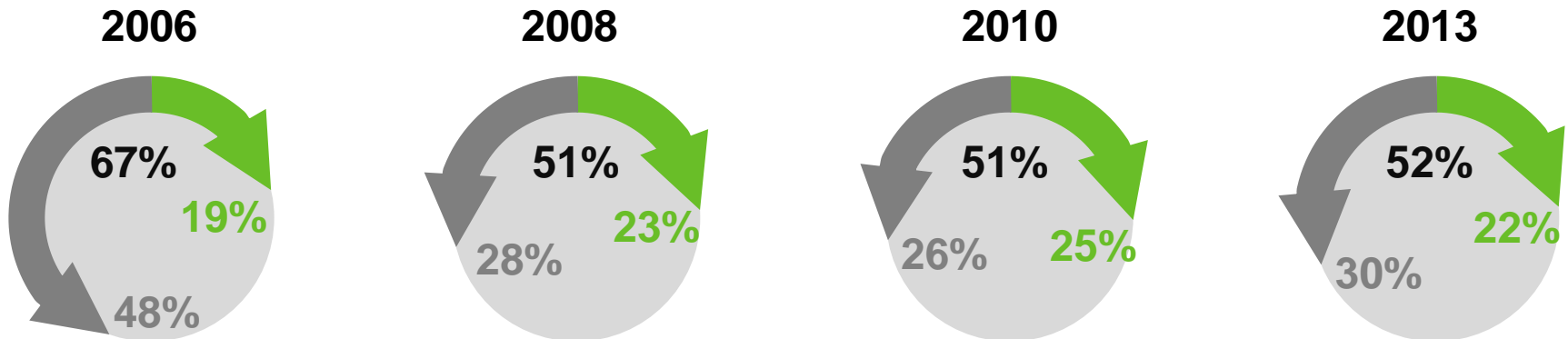


While the French relationship with cooking is quite strong, since 2006, some of the fun previously attached to cooking has been lost. Passion about cooking remains steady.

4

 **Good Fun**    **A Passion**

### Attitude towards cooking

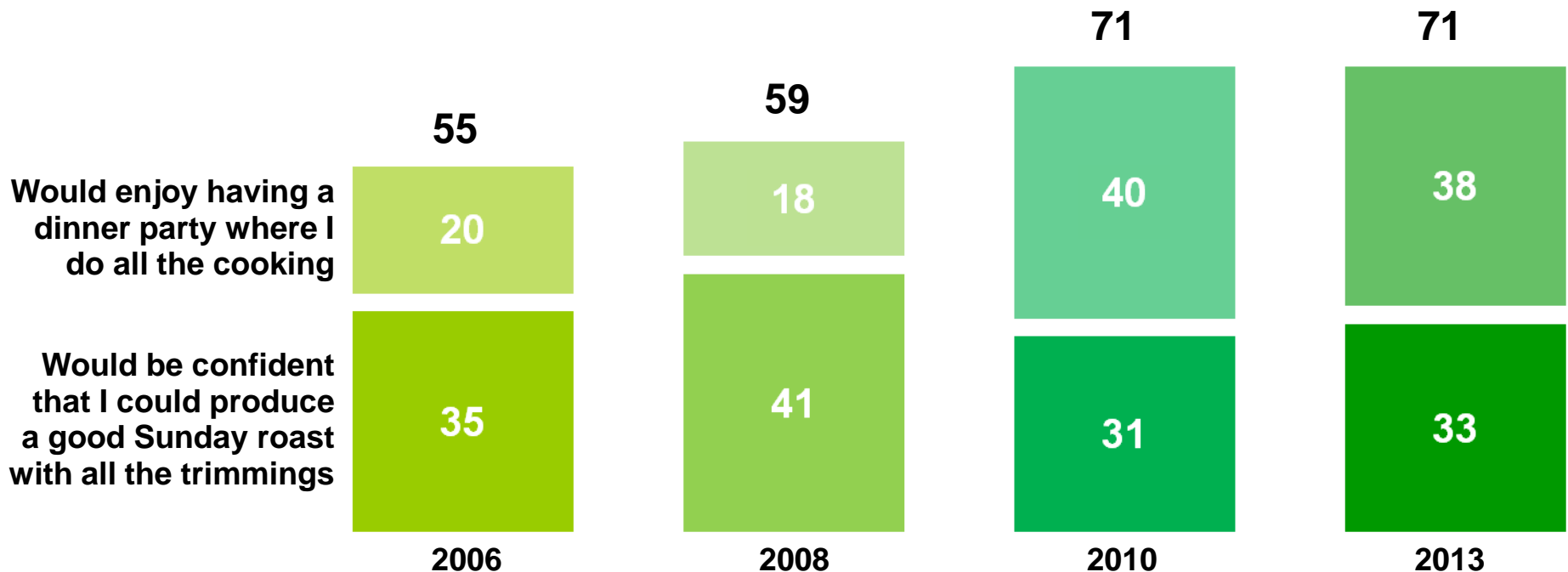


When it comes to cooking, the French rank as the 2nd most passionate country, behind Germany. They have much less fun than many other countries however, in particular, Germany, Sweden and Belgium.

In the past 7 years, the proportion that are comfortable as a dinner party host has risen significantly. Since 2008, culinary expertise in France has improved considerably.

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### Level of cooking expertise



On the basis of dinner party hosting and producing meals with all the trimmings, France is the third most competent country at cooking compared to all other countries in the PERIscope 2013 study.

More than 75% of French adults prepare their meals from scratch few times a day/few times a week ,yet current scratch cooking levels have fallen in the past three years.

6

 *% preparing a meal from scratch once/ few times a day*       *% preparing a meal from scratch few times a week*

**2006**

**2008**

**2010**

**2013**

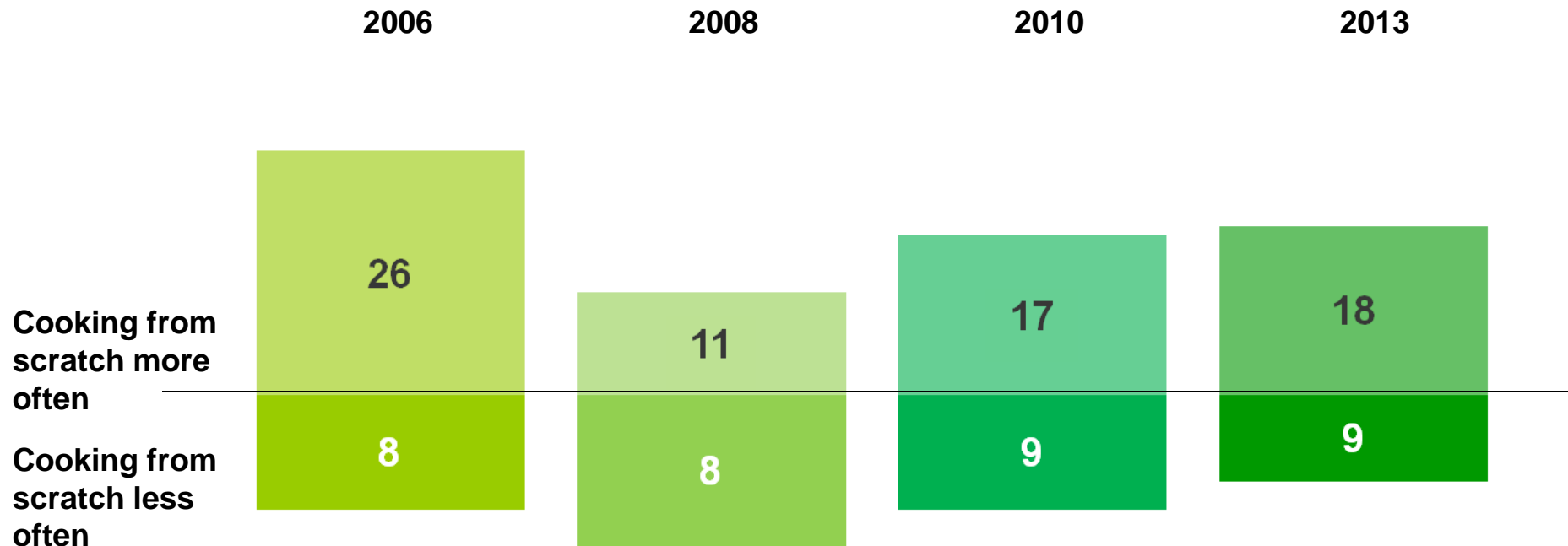


Compared to other countries in this study, France ranks joint 4th for scratch cooking, behind NZ, the Netherlands and Spain.

The majority of French consumers are cooking from scratch to the same extent as 12 months ago, however, just under two in ten are scratch cooking more often.

7

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

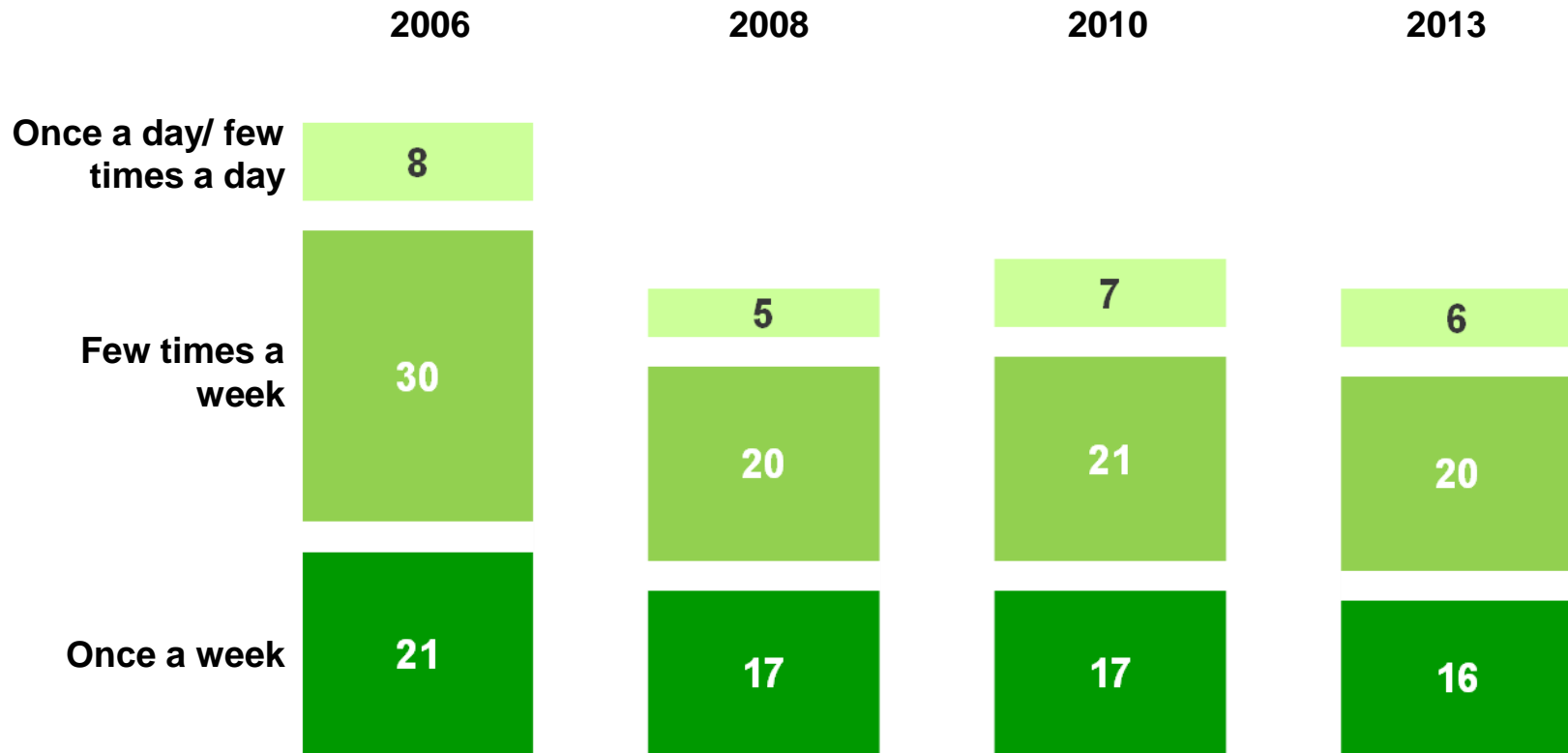


France is behaving similarly to many other countries when it comes to scratch cooking. The Spanish have increased their scratch cooking the most.

France has decreased the amount of ready prepared meal components in its meals. The biggest area of adjustment has been in its weekly usage of these ingredients.

8

### Use of ready prepared ingredients



In terms of daily/ weekly usage of ready prepared ingredients, France ranks as the lowest, alongside Belgium. Usage is highest in the US, GB and NZ.



Attendance of cooking classes in France has shown a slight increase in the past three years, as has the proportion entertaining at home more often than before .

9

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

**2013**

**8**

**2010**

**5**

**% who are entertaining  
at home more often  
nowadays**

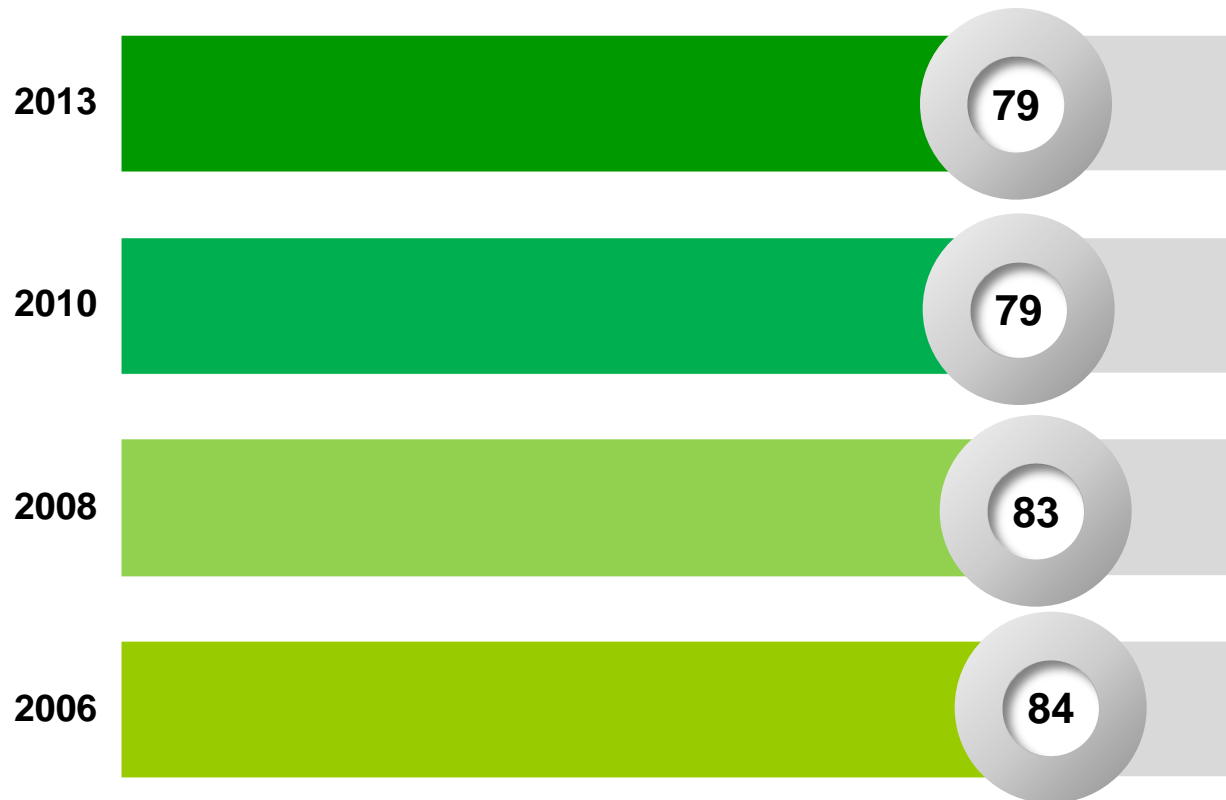
**44**

**40**

ROI and Spain are the highest attenders of cooking classes. France ranks fourth. In terms of entertaining at home, the Dutch claim to be doing this considerably more than other countries. France ranks in second place.

The enjoyment obtained from cooking has declined slightly, however, with more than three quarters getting enjoyment from creating a great meal, satisfaction remains high. <sup>10</sup>

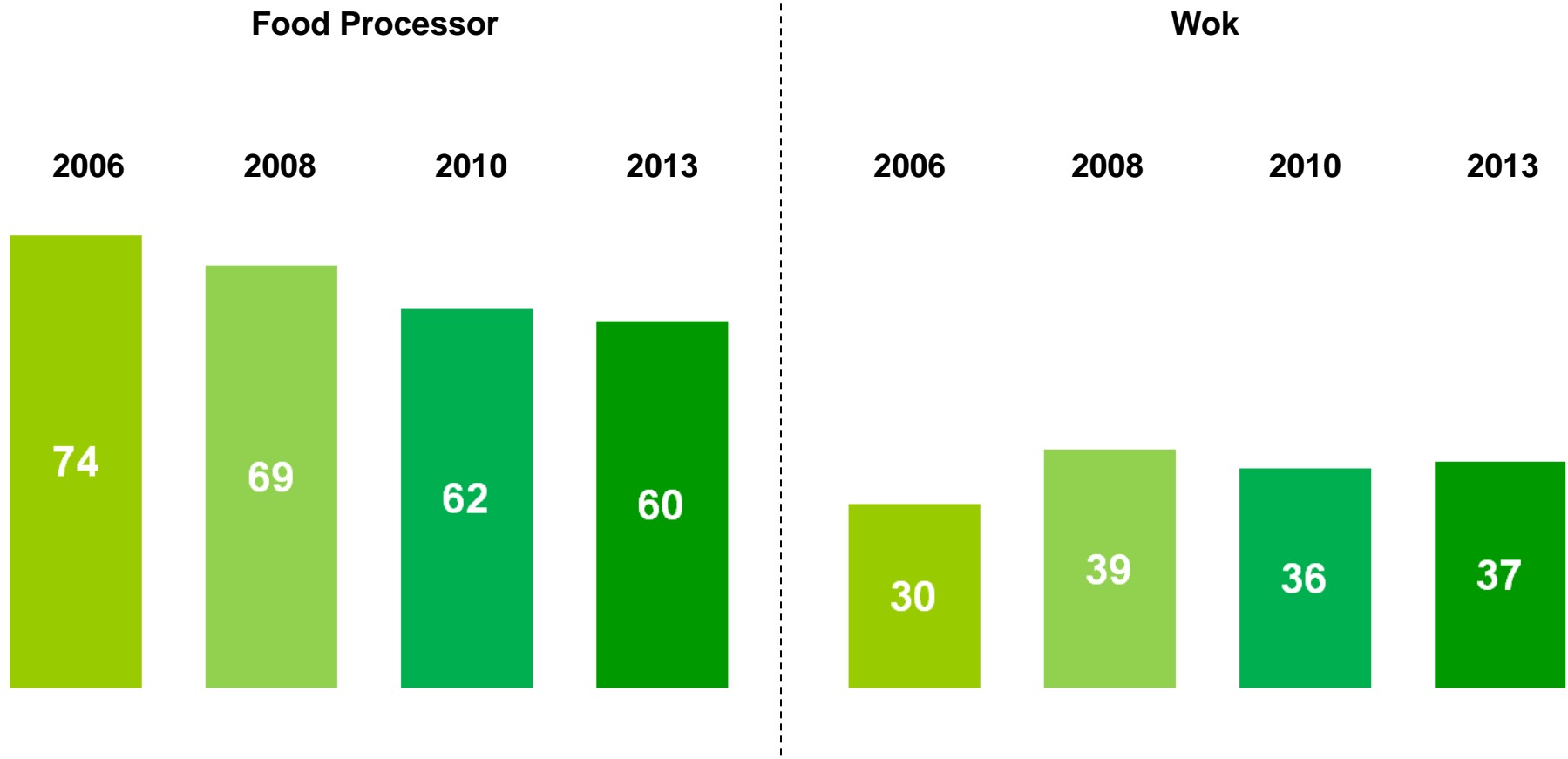
**% applies that they *'enjoy cooking and being able to create a great meal'***



Compared to other countries in the PERIscope 2013 study, France ranks sixth for enjoyment experienced as a result of creating a great meal. NZ and Germany display the highest enjoyment levels.

Ownership of food processors have declined considerably compared to seven years ago. Woks, on the other hand, have shown a slight increase in popularity over time.

11



France has one of the highest ownerships of food processors, alongside Sweden and NZ. In comparison, it has one of the lowest ownerships of woks.

While the majority of French adults are looking for food that is easy to prepare and quick to cook, demand for both of these characteristics has fallen steadily since 2008.

12

%  
Applies

2006

2008

2010

2013

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

87

88

80

78

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

82

89

70

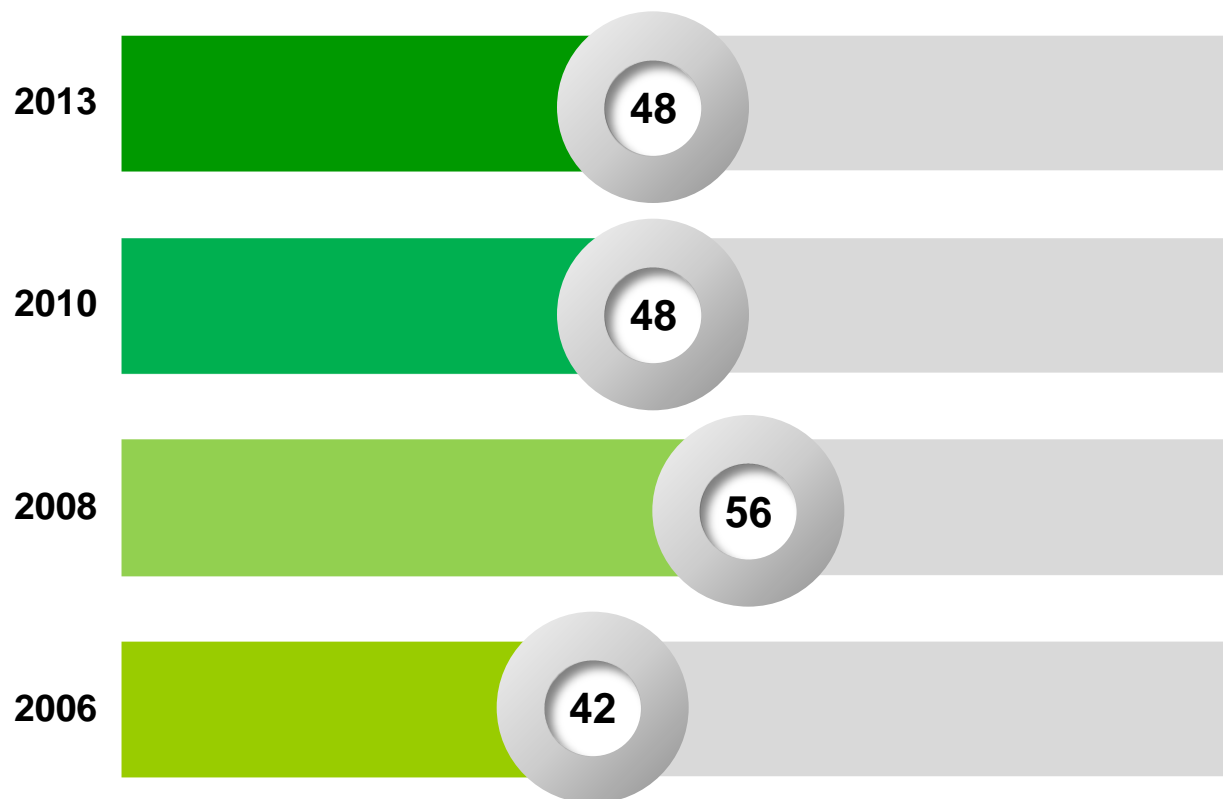
67

France is similar to ROI and GB when it comes to picking foods that are quick to prepare. It displays the least tendency to pick foods that are quick to cook when compared to all other countries in the study.

Less than half of French adults claim to use a lot of ready to eat foods in their households. This represents a fall of eight percentage points in five years.

13

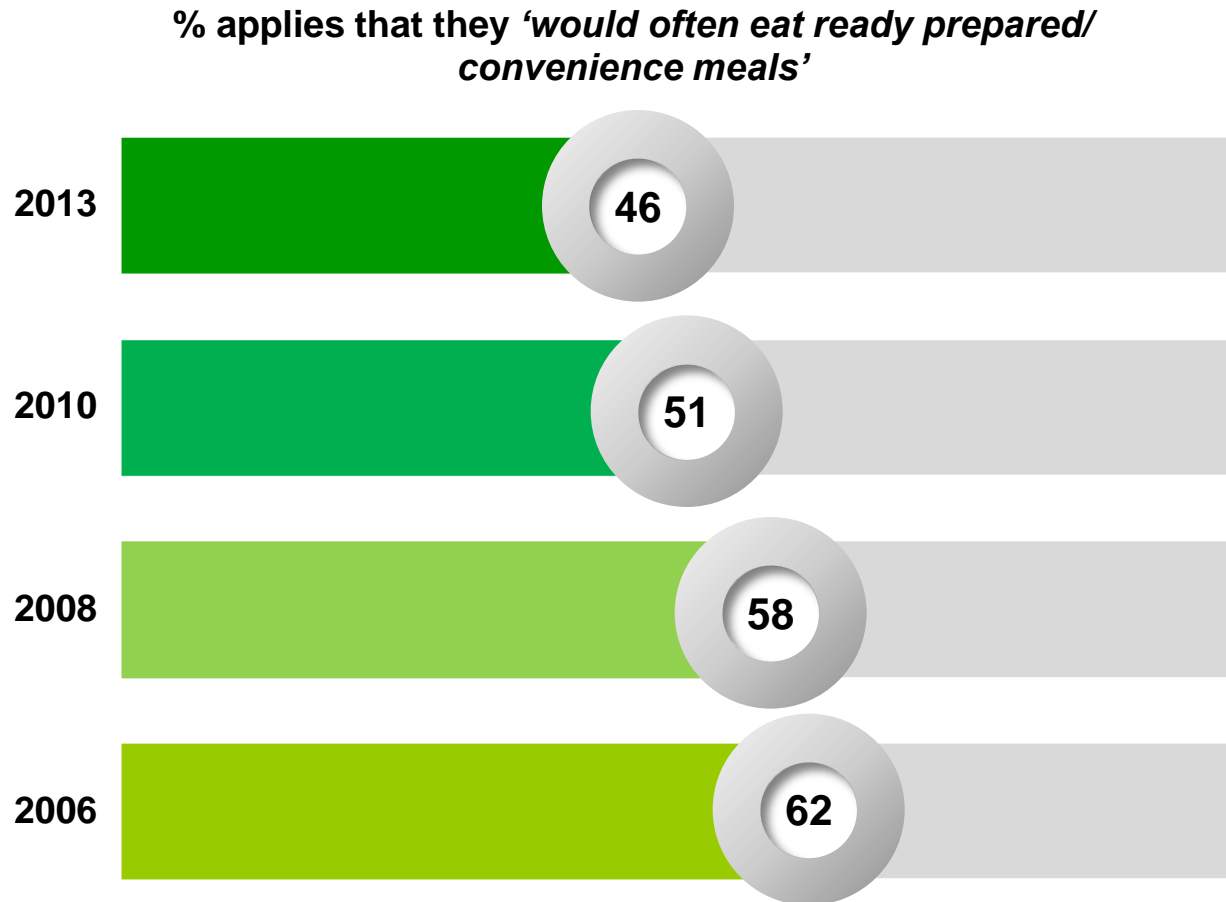
**% applies 'we use a lot of ready to eat foods in our household'**



France displays average use of ready to eat foods compared to all other countries. It is far ahead of the US (68%) but much behind Sweden (31%).

The proportion agreeing that they would often eat ready prepared/ convenience meals has fallen steadily since 2006.

14

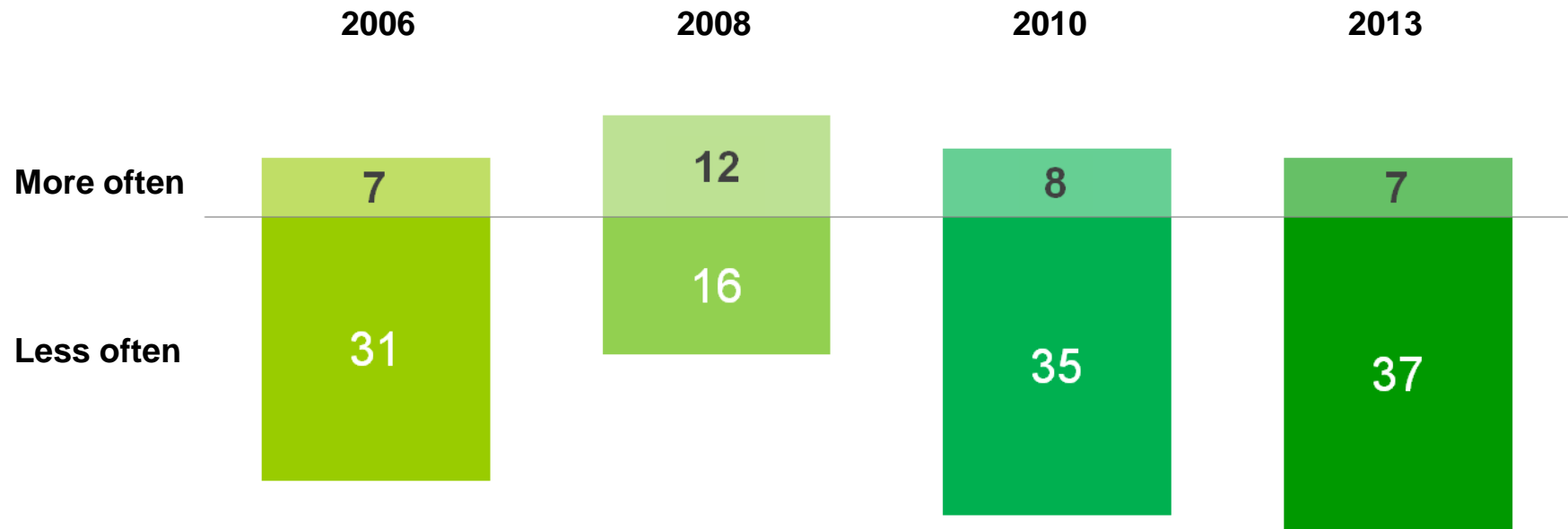


Eating convenience meals is least popular in France, the Netherlands, Sweden and Belgium. It is highest in the US (71%) and Spain (69%).

In France, more people than ever before are claiming to eat ready meals/ convenience meals less often than 12 months ago.

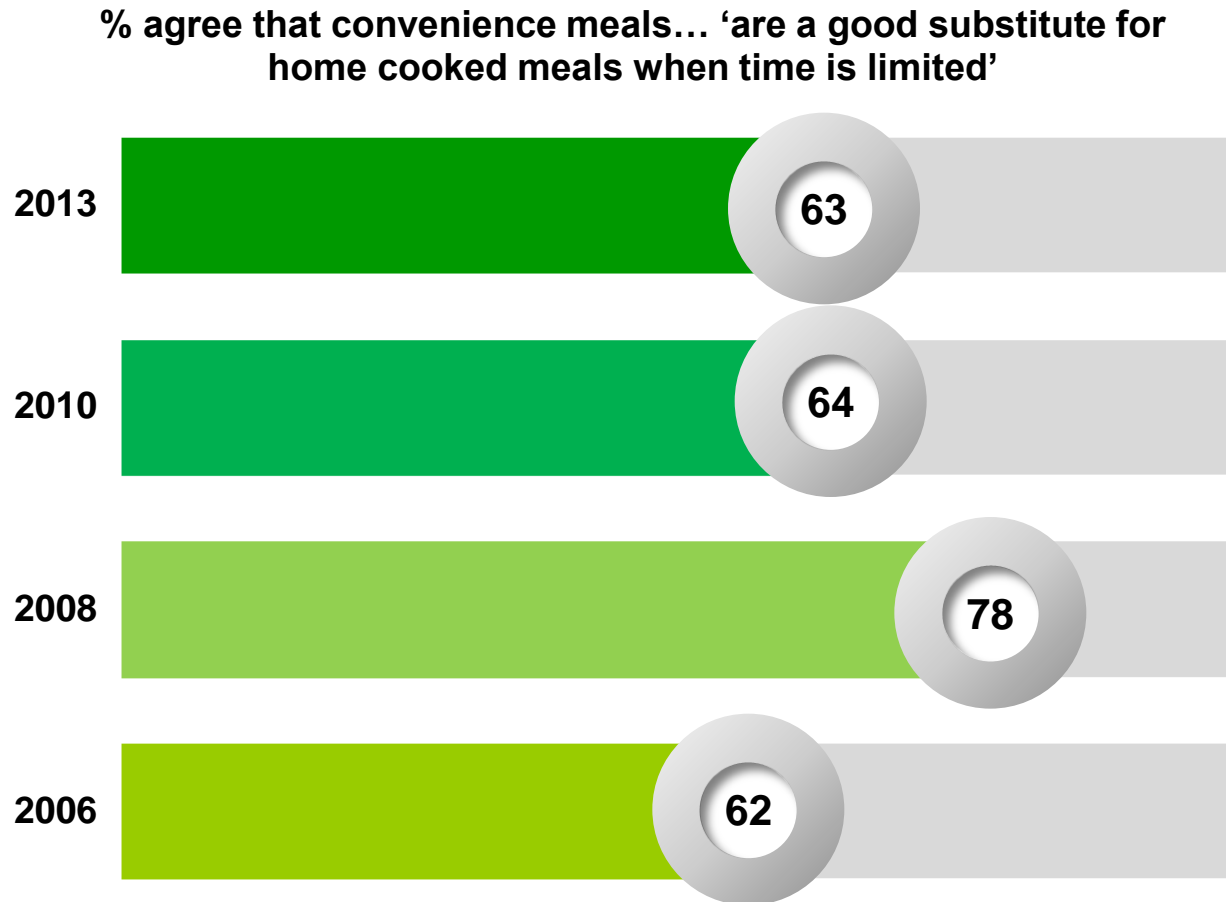
15

**% eating ready meals/ convenience meals more/less often than  
12 months ago**



France ranks first of all the countries for the proportion claiming to eat ready meals/ convenience meals less often than 12 months ago. The US ranks last.

Despite falling consumption levels, more than six in ten French adults consider convenience meals to be a good substitute for home cooked meals when time is limited.<sup>16</sup>



France displays the highest level of agreement with the idea that convenience meals can be a good substitute for home cooked meals. The Netherlands and ROI show the lowest support.



Convenience foods are being viewed with increasing negativity. In particular, there is now substantially more negativity about the quality of ingredients used in these products.<sup>17</sup>

Convenience foods.....

... are expensive



... are good value for money



... have poor quality ingredients



... taste great



France shows average levels of agreement when it comes to claims that convenience meals 'taste great' or are 'good value for money'. It ranks first in its belief that convenience meals have poor quality ingredients.

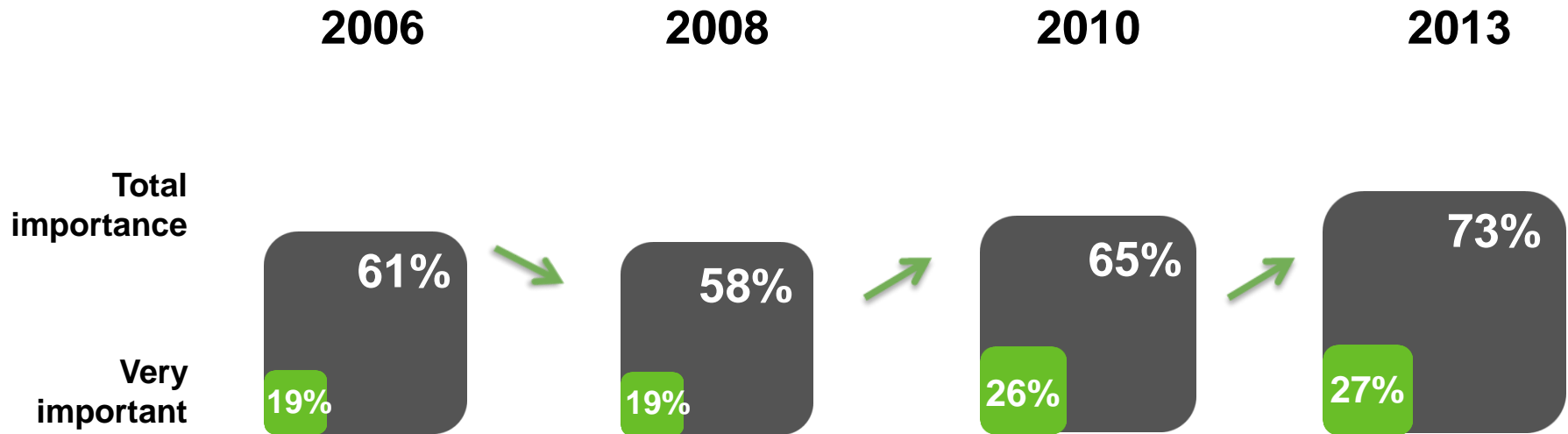
# Back To Basics



When shopping for food, local food has become more important than ever before. Support for 'local' has been rising steadily since 2008.

19

### Importance of buying local food produce when shopping

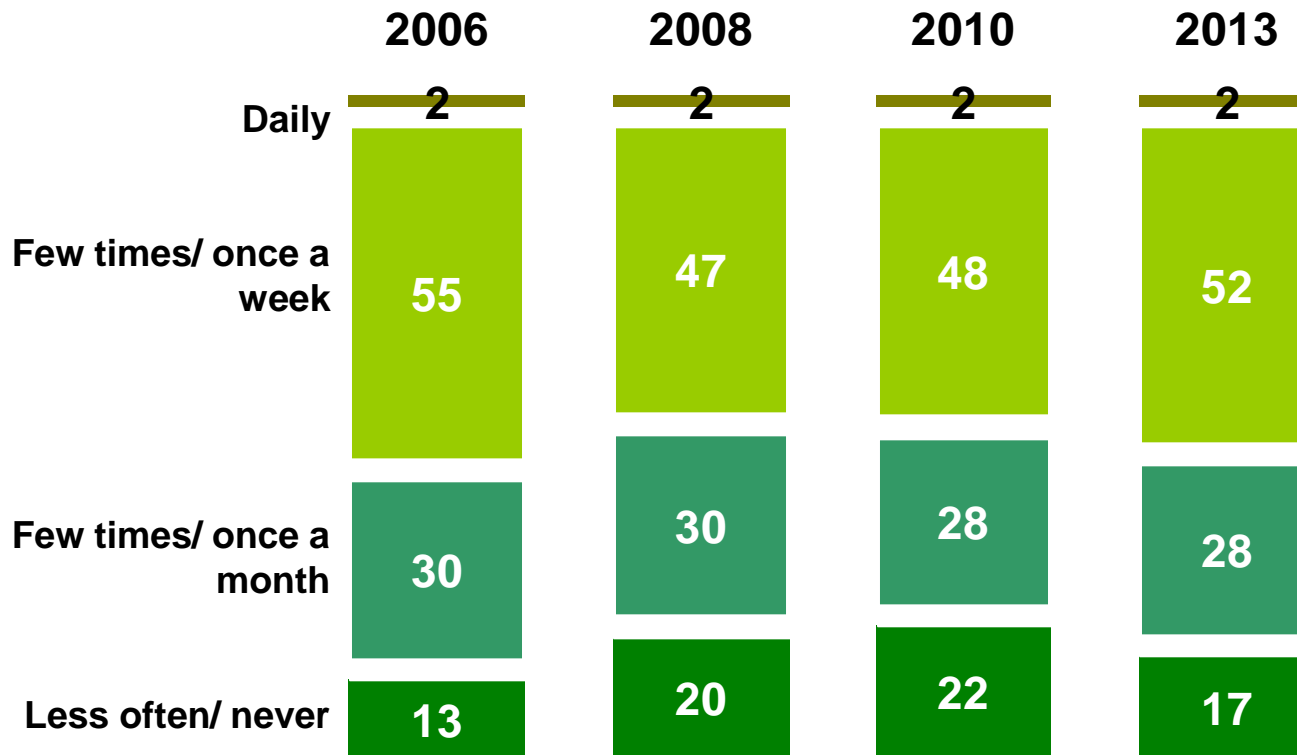


France places the most importance on buying local, compared to all other countries in the study.  
The Netherlands places the least amount of importance on local (27%).

The momentum of buying local food more frequently has gained ground since 2008, with noticeable progress made since the last wave of research.

20

### Frequency of 'local' food purchases



France remains behind Spain, Germany, Sweden and NZ in terms of local food purchases.

The French associate 'local food' as that which is in very close reach to where they live and which may not be available in conventional stores.

21

More than 4 in  
10 believe local  
food is food  
that is...

**46%**

*... available in farmers' markets*

**45%**

*... made within a 20 mile radius from where I live*

**41%**

*... made within close proximity to where I live*

Much less  
believe local  
food to refer to  
food that is ...

**21%**

*... made within the county in which I live*

**21%**

*... made within the province I live*

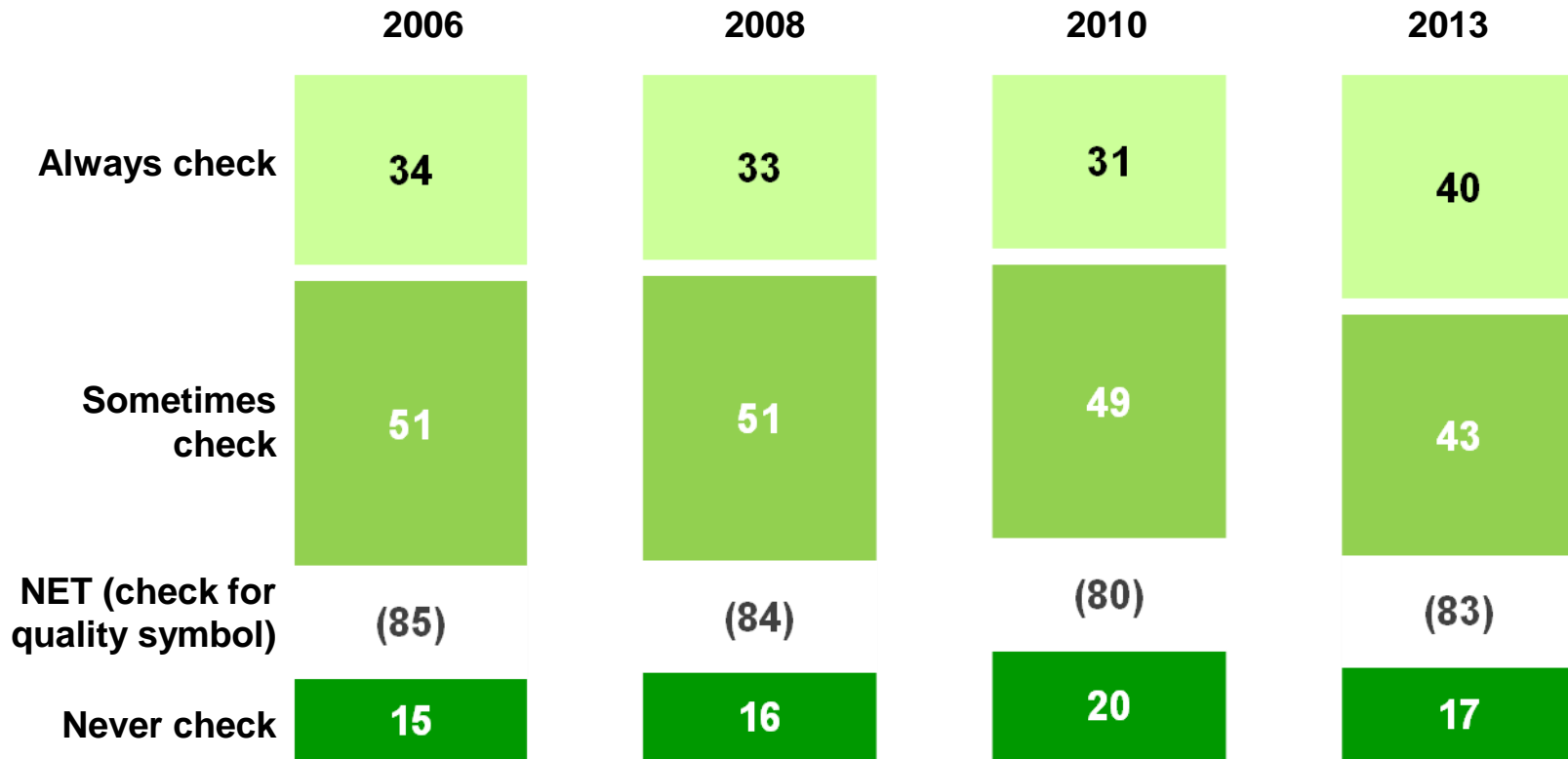
**2%**

*... made within Europe*

The routine of checking for the country of origin label is well established in France and has shown little signs of change in the past eight years.

22

### Checking for Country of Origin label

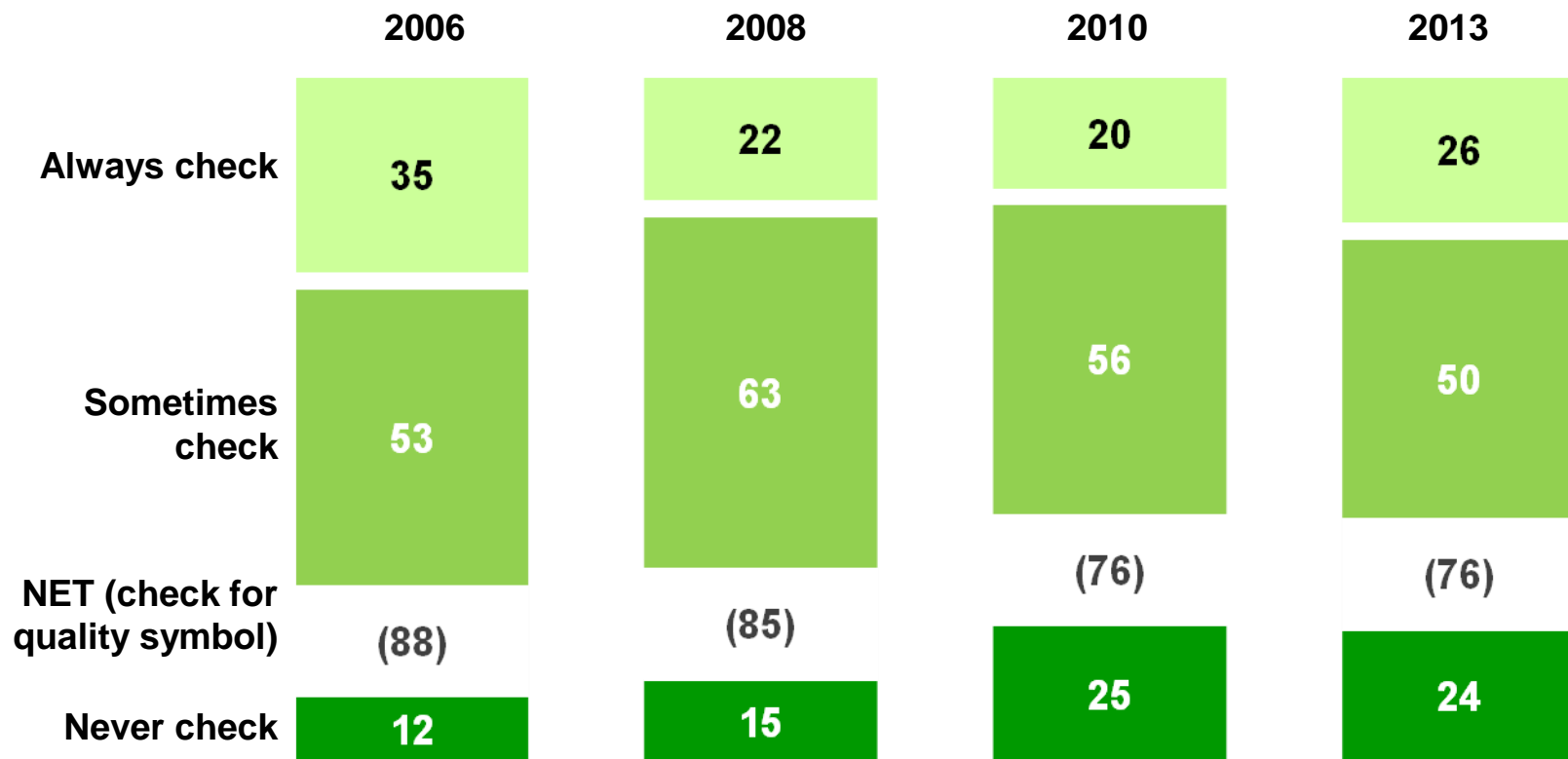


France ranks fourth in terms of checking for country of origin. However, it displays similar levels to Germany (85%) and Spain (84%). Sweden ranks first (92%).

In France, checking for the symbol of quality remains high, although, it is still below 2006 levels. The proportion claiming to never check stands at just under one quarter.

23

### Checking for Symbol of Quality label



France ranks as joint second, alongside ROI, for checking for the symbol of quality label on food. Spain is the most likely to check (82%).

Despite a slight fall in the past eight years, the French continue to place strong emphasis on eating dinner together as a family.

24

**% applies that *'it is important to spend time over dinner as a family'***



Spending time eating dinner together as a family is important in all countries, with over eighty per cent agreement in all territories. It is most important in Spain, Sweden, Belgium, France and the Netherlands.



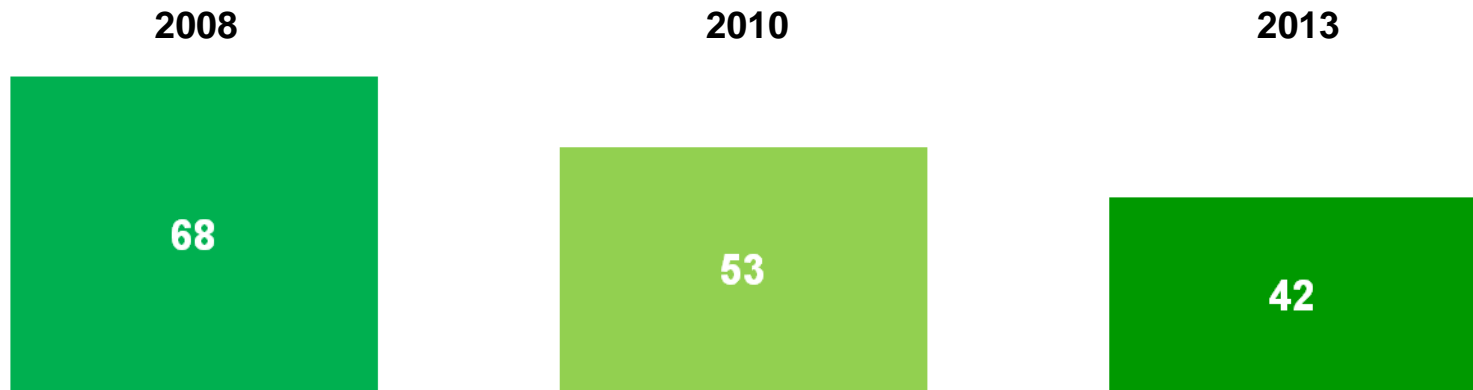
# Food & Sustainability



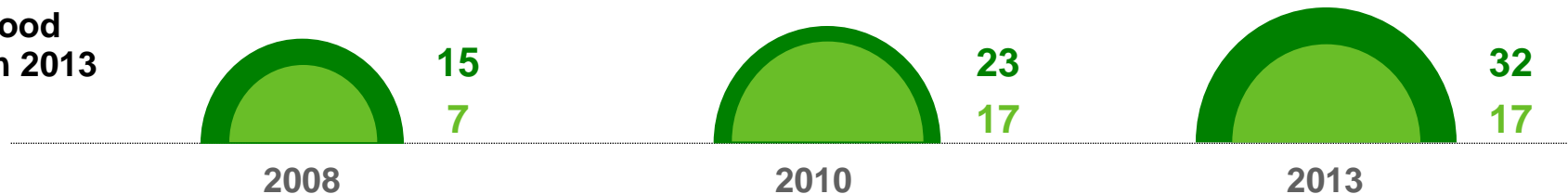
Awareness of food miles has shown considerable improvement since 2008. The percentage buying foods with low food miles has more than doubled over time.

26

### % never heard of food miles



### % who buy foods with low food miles in 2013



*TOTAL % who buy foods with low food miles*



*% who sometimes try to buy food with low food miles*

France ranks amongst the highest for awareness of food miles. It ranks third overall in terms of purchases.

Sustainability continues to be a very well known term in France. The proportion claiming to buy foods with sustainable features has been rising steadily and is now at its highest. <sup>27</sup>

**% never heard of sustainability**

2008

2010

2013

11

4

8

**% who buy foods with sustainable features in 2013**

35

21

46

37

48

25

2008

2010

2013



*TOTAL % who buy foods with low features*

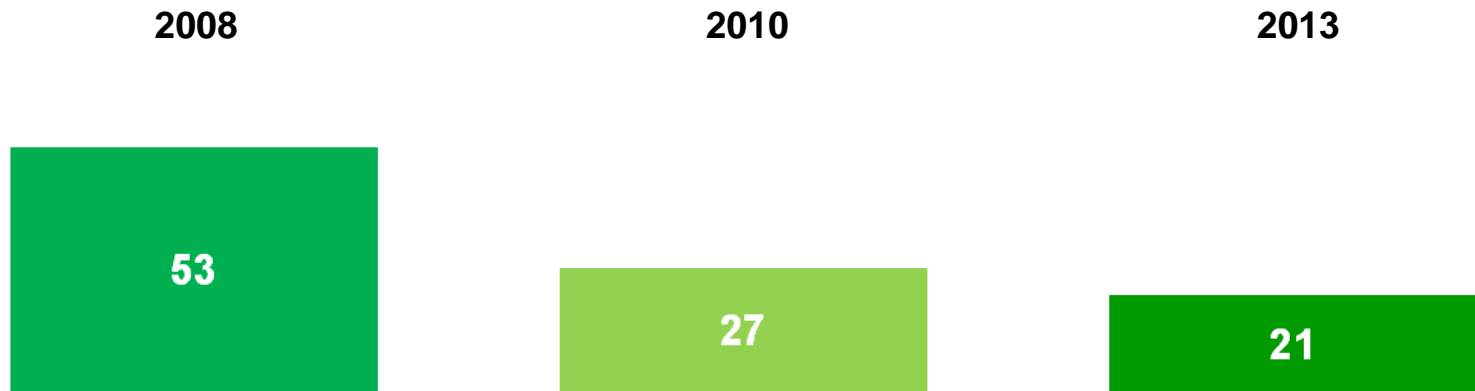


*% who sometimes try to buy food with low features*

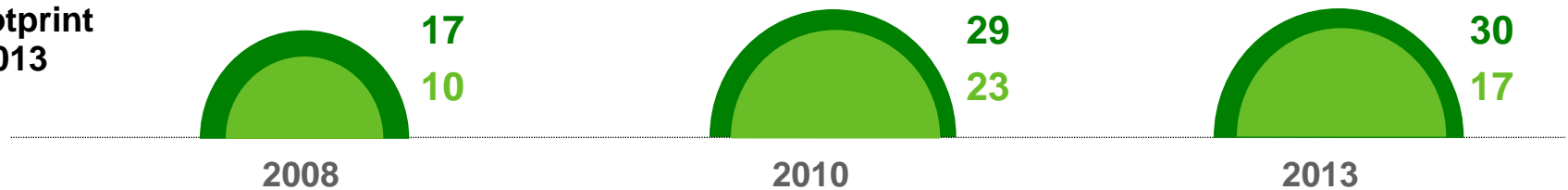
France has the highest awareness of sustainability and ranks amongst the highest for 'sustainable' purchases.

Compared to 2008, those claiming to have never heard of carbon footprint is significantly depleted. Purchases of low footprint products have failed to gain the same momentum.<sup>28</sup>

**% never heard of carbon footprint**



**% who buy foods with low footprint in 2013**



*TOTAL % who buy foods with low footprint*



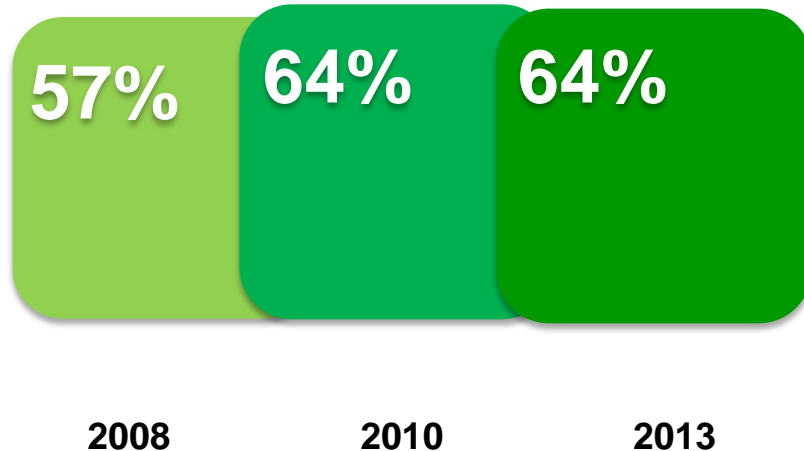
*% who sometimes try to buy food with low footprint*

France ranks third for awareness of carbon footprint but has the highest purchases of low footprint foods.

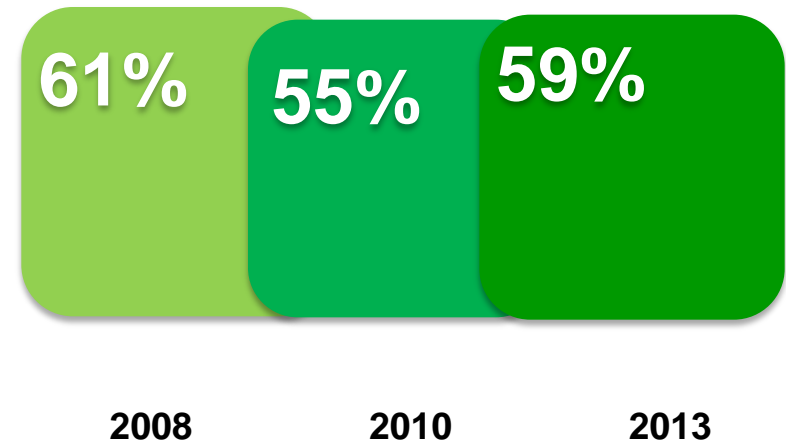
The French are more conscious of environmental issues in their choice of products than previously. Buying from environmentally aware companies has recovered slightly.

29

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



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

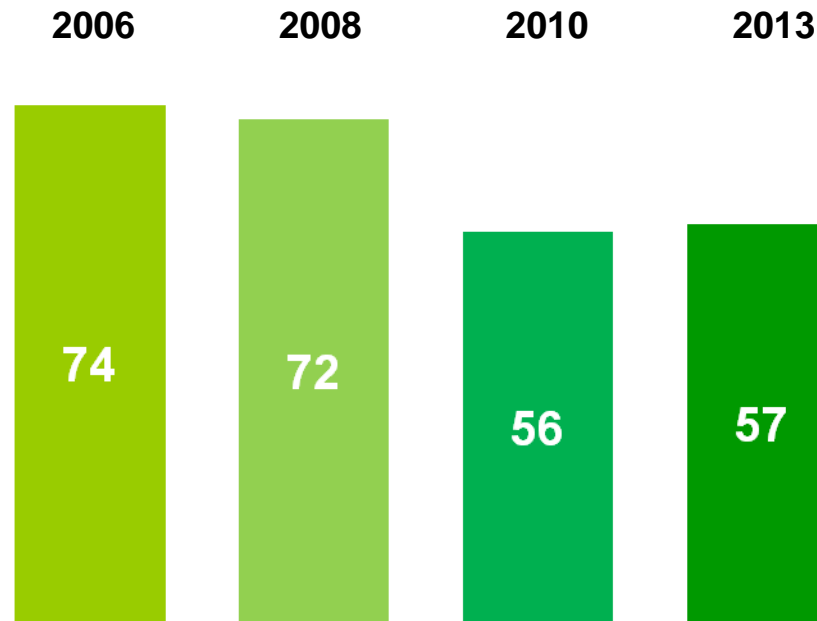


Consumer consciousness for environmental issues is highest in France while it ranks third, behind Sweden (64%) and Spain (61%) when it comes to buying from environmentally aware companies.

Buying in smaller packs to avoid waste was a more popular behaviour amongst French grocery shoppers in the past than it is today.

30

**% applies that they *'buy food in smaller packs because it means less waste'***

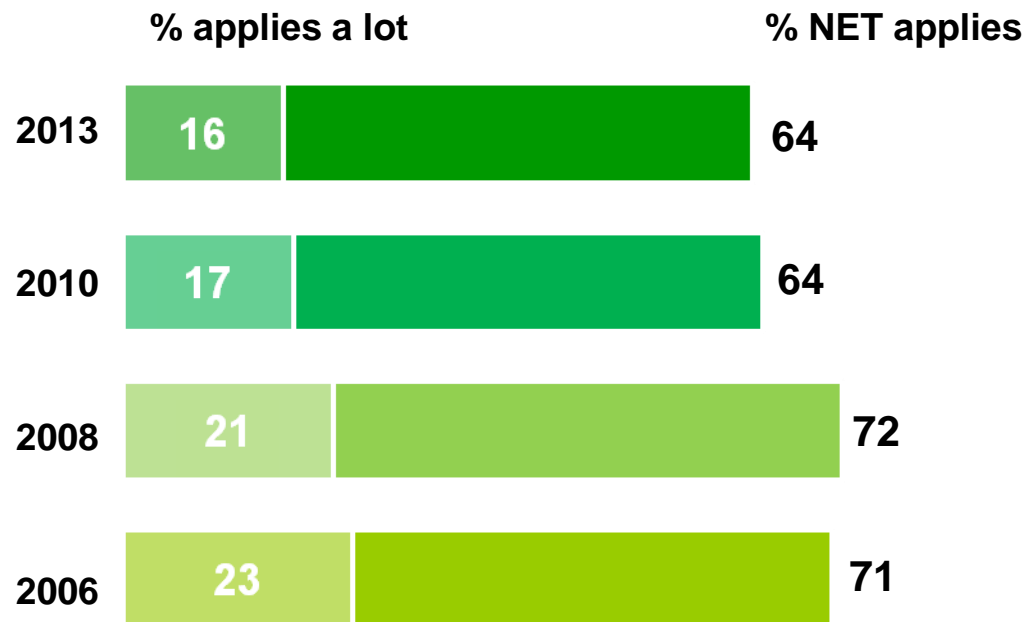


The Germans (81%) are particularly conscious of cutting down on food waste.  
The French sit alongside Sweden, Belgium and NZ at 57%.

Efforts to buy Fair Trade products by French adults have declined. These efforts seem to have found stable ground since 2010.

31

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



Despite a decline in purchases, the French rank third overall when it comes to efforts to buy Fair Trade products. Spain claim to try to buy these products the most while the US are the least inclined.

# Shopping Around

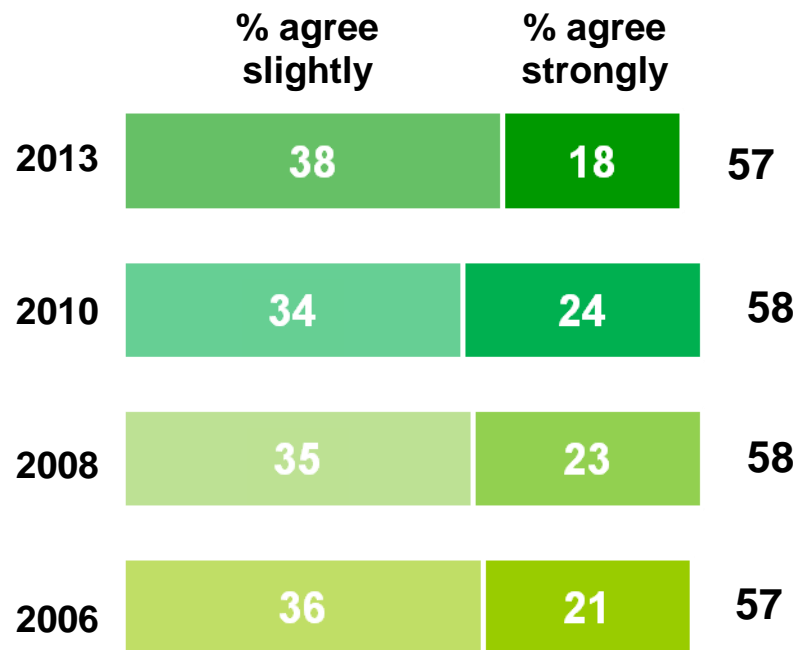




Despite a changing economic environment, the importance placed on price has remained unchanged in the past eight years.

33

***When I shop the first thing I look for is price***

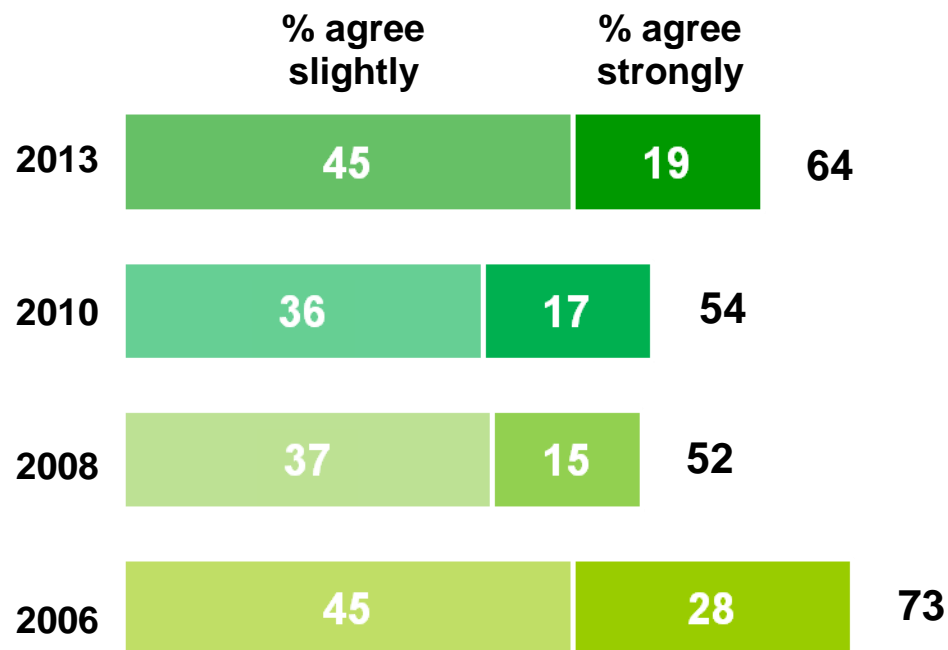


Looking for price as a 'first thing' is a more important shopping behaviour in NZ (68%) and ROI (64%). France ranks 6<sup>th</sup> overall.

The emphasis placed on quality over price was highest in 2006. Since then, grocery shoppers have placed less emphasis on this, though a resurgence is evident in 2013.

34

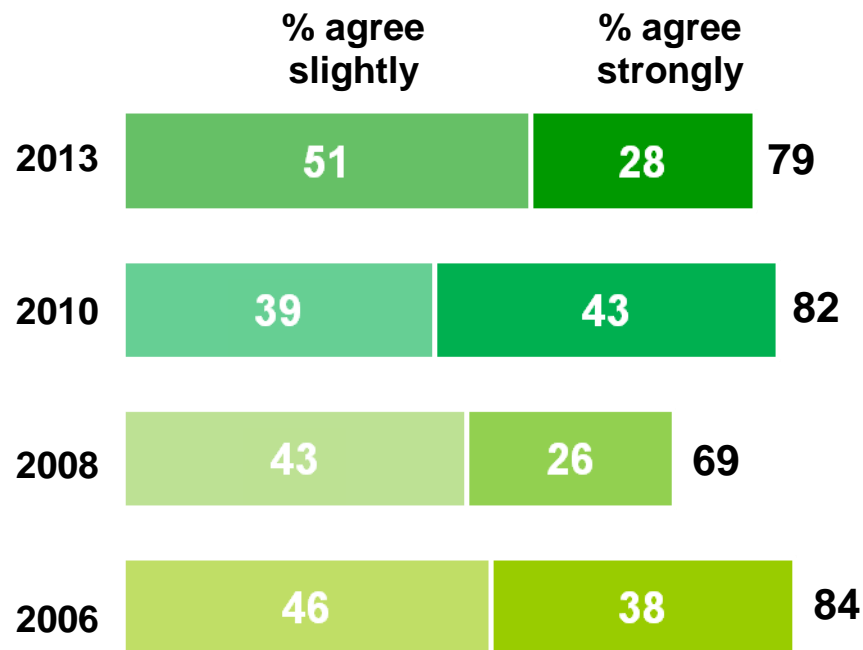
***Quality of fresh food is more important than price***



France displays an average level of agreement with the idea that quality is more important than price. It is considerably behind ROI (79%).

Getting value for money is important for the majority of French grocery shoppers. Yet, its importance has declined somewhat compared to 2006 levels. 35

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

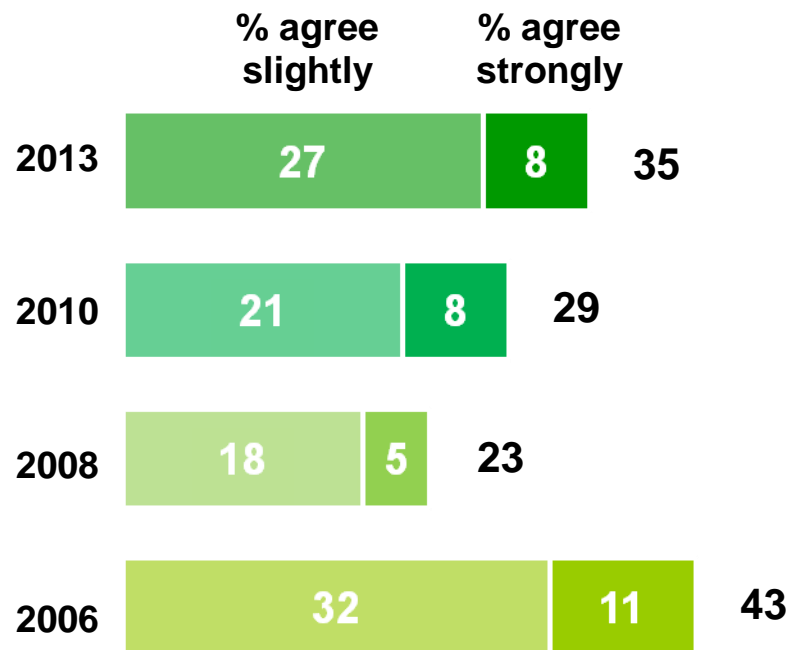


Value for money is most important to the NZ grocery shopper. ROI, France and Belgium follow closely behind.

The idea of customer service commanding a premium price is popular amongst just over one third of French shoppers, an increase on the past two waves of research.

36

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

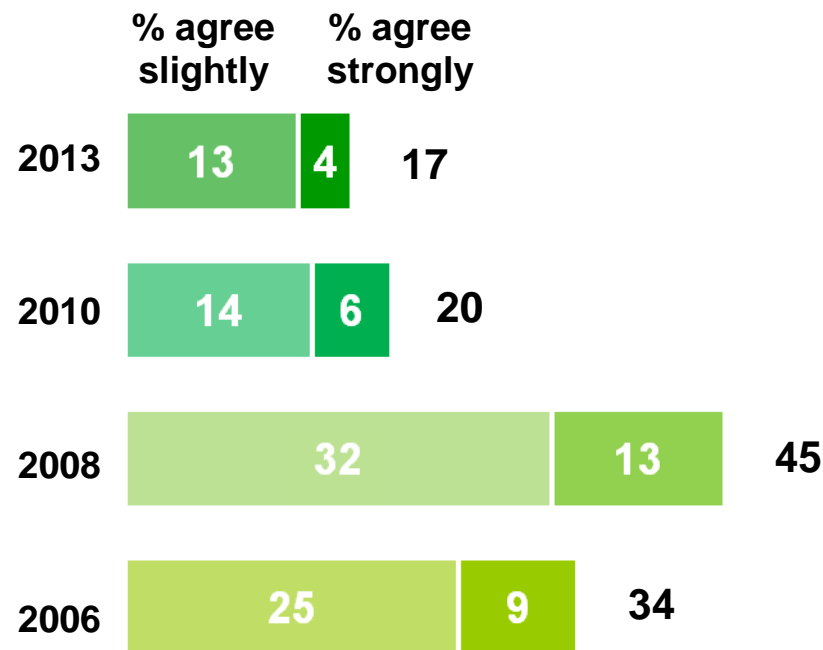


France ranks 4<sup>th</sup> in terms of willingness to pay a premium for superior customer service. Spain (48%) and Sweden (47%) record the highest scores.

Buying products on impulse is not a popular feature amongst French grocery shoppers. The propensity to do so was highest in 2008 but has fallen considerably since then.

37

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

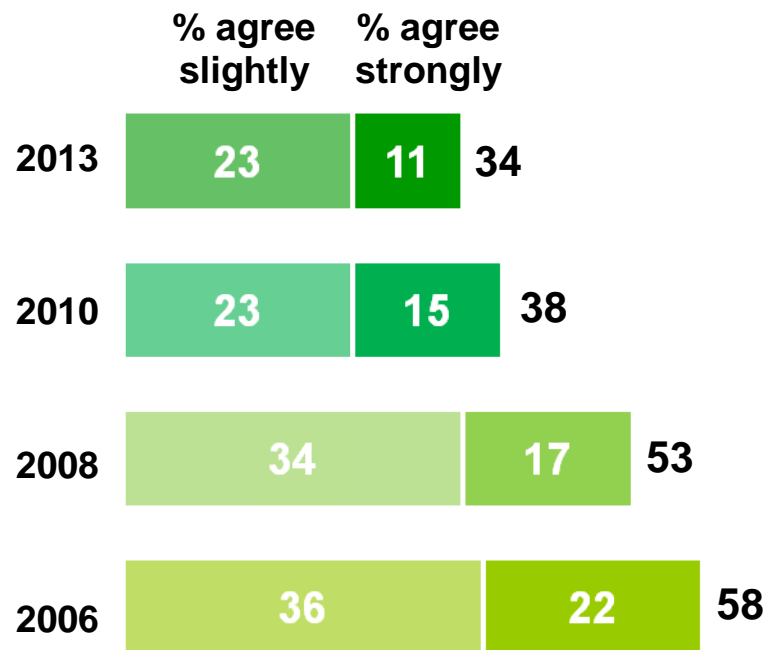


France is the least likely country to respond impulsively towards cheap products.  
GB (54%) is the most likely to respond impulsively.

Spending time looking for a bargain is a shopping behaviour that has declined significantly in popularity amongst French grocery shoppers in recent years.

38

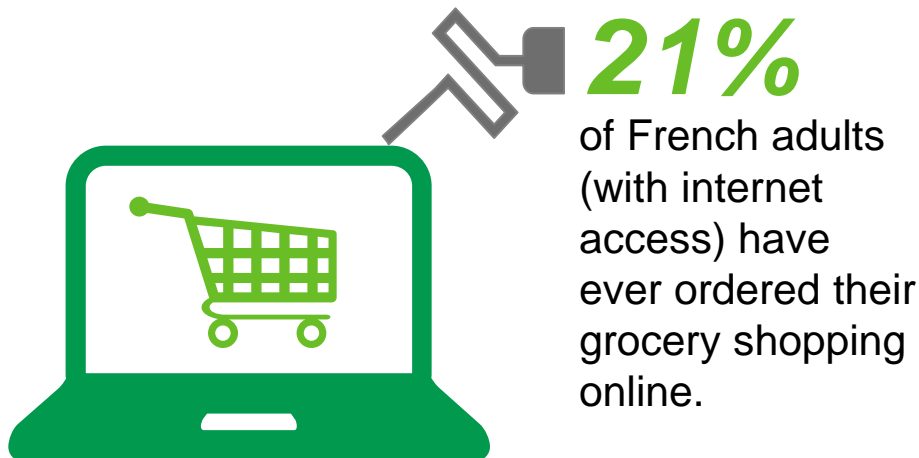
***I don't mind spending time looking for a bargain***



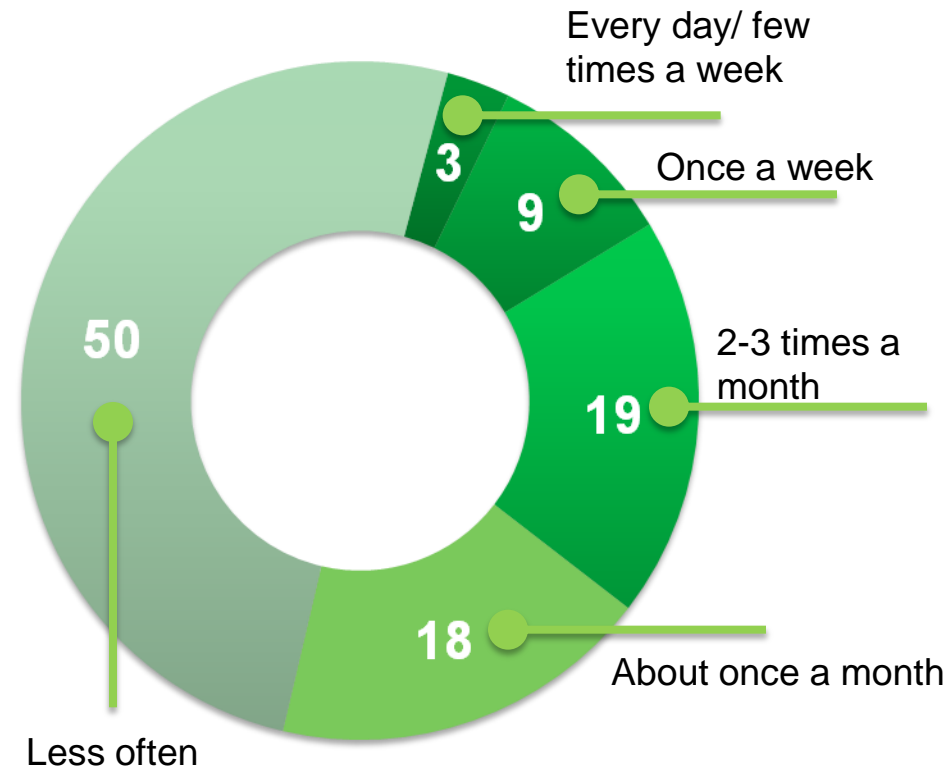
France and Sweden display the lowest willingness to spend time looking for bargains. The US are the biggest bargain hunters (63%).

More than 2 in 10 French adults have ordered their grocery shopping online. Half of these do this once a month or more often.

39



### How often have they ordered their grocery shopping online?



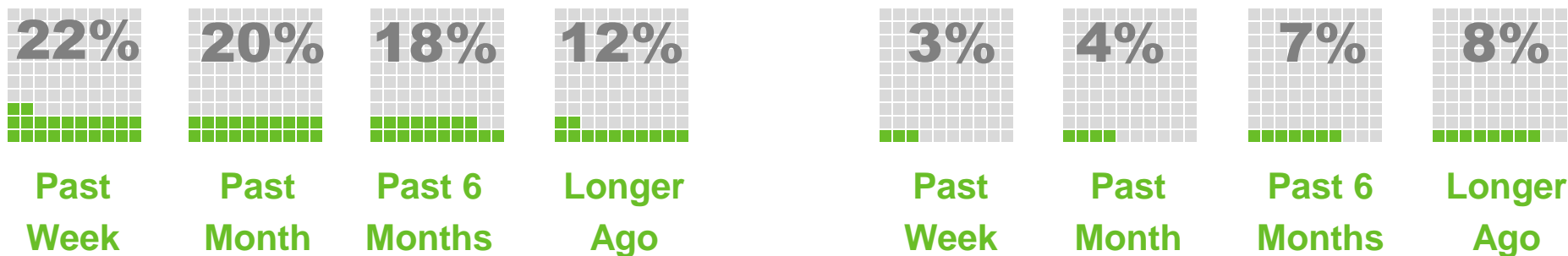
France has the third highest percentage of people who have ordered their shopping online, behind Spain and GB. It ranks highest, however, in terms of frequency of online grocery purchases.

Currently, using the internet to access recipes is significantly more popular than downloading food apps.

40



Most recent download activity



France ranks fourth for the percentage of people who have downloaded a recipe, behind NZ, Sweden and Spain. It ranks fifth for the percentage of people who have downloaded a Food App.

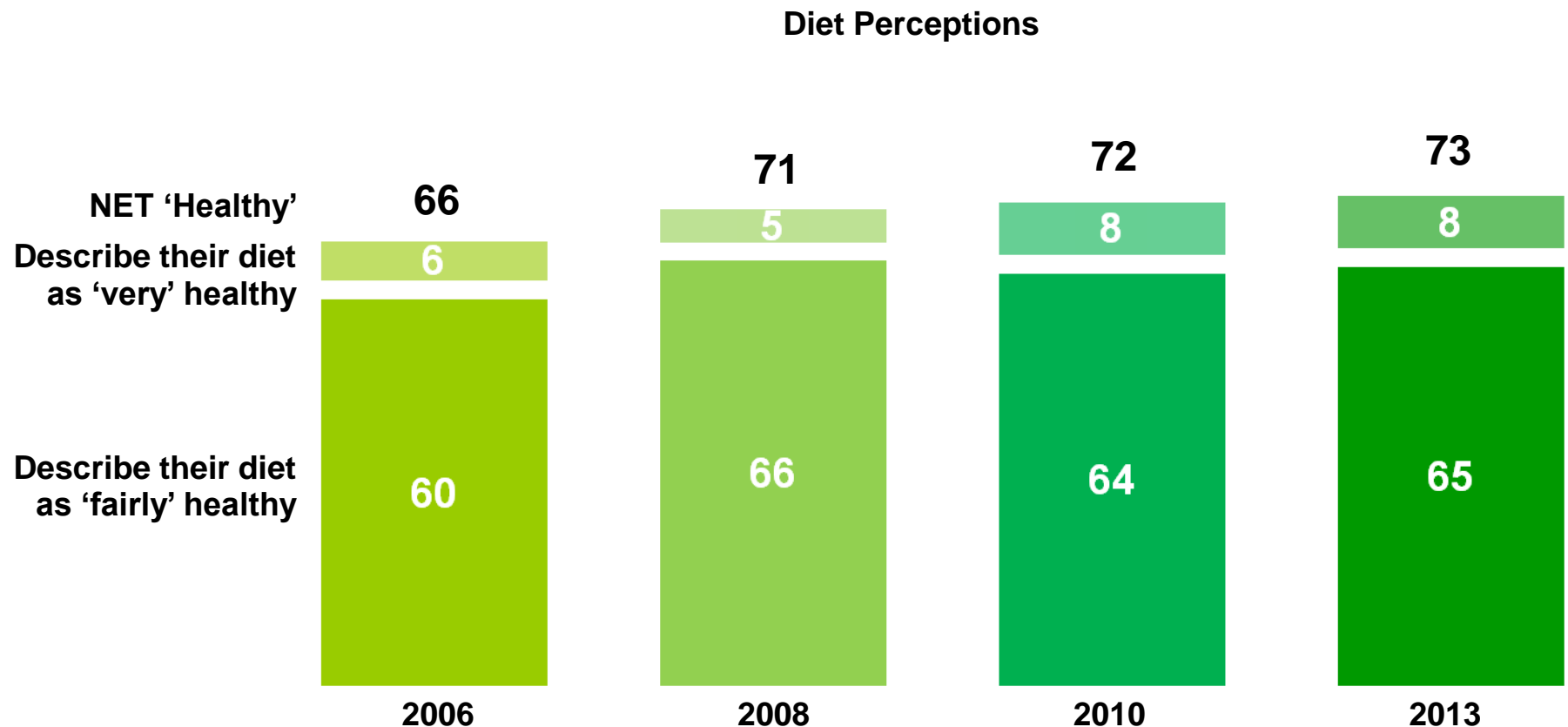


# Health & Wellbeing



Perceptions of diet amongst the French have shown signs of improvement in recent years. The proportion claiming to be 'very' healthy, however, remains extremely low.

42

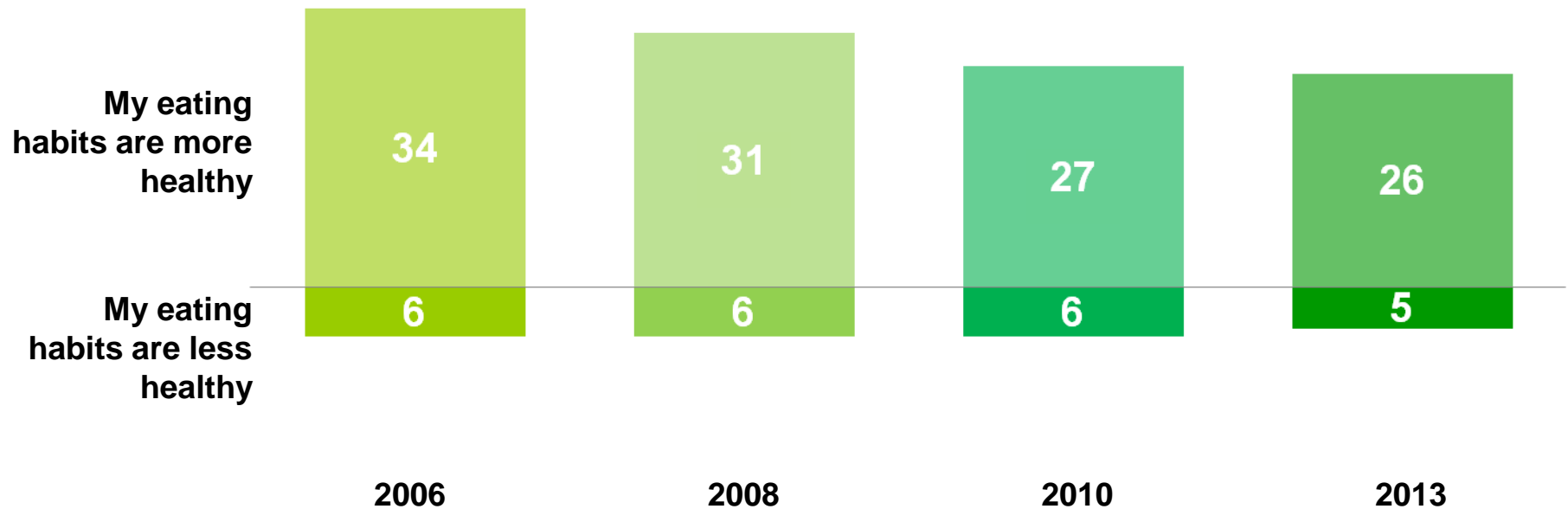


France's perception of its own healthiness is one of the lowest of the PERIscope 2013 study. It ranks ahead of only Germany and the US. ROI considers itself to be the healthiest country.

Just over one quarter of French adults believe their eating habits to be more healthy in the last 12 months. This represents a lower figure than in previous years.

43

### Changes in eating habits in last 12 months

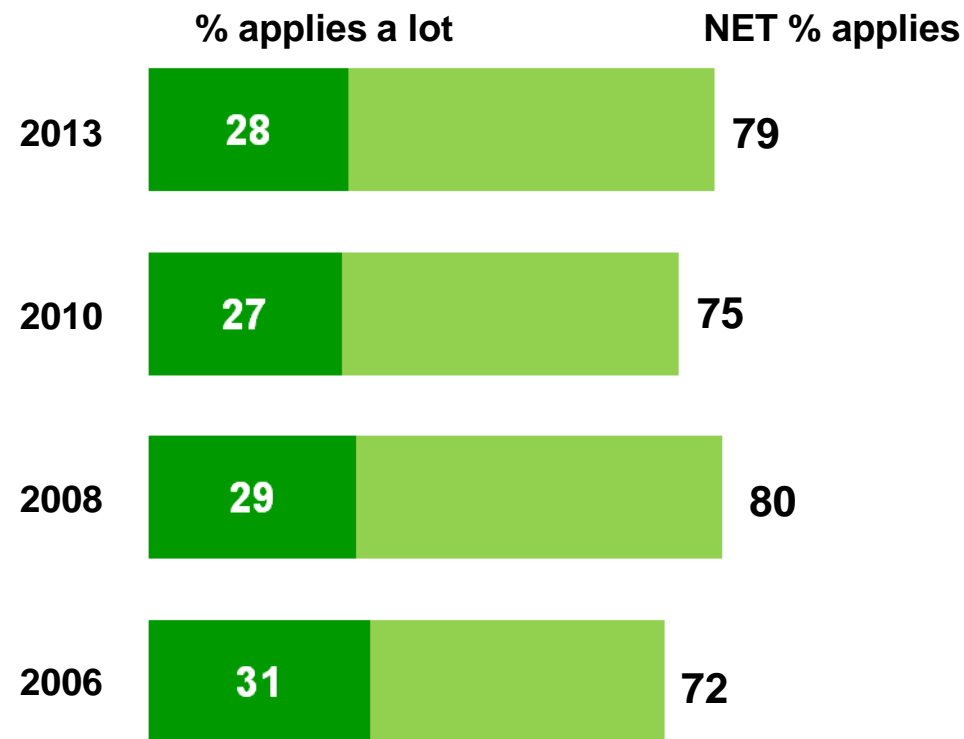


Spain is the most positive country when it comes to believing its eating habits are healthier than before. France is similar to Belgium and the Netherlands.

Efforts to eat at least 5 portions of fruit and veg each day are high in France and have shown some improvements in the past three years.

44

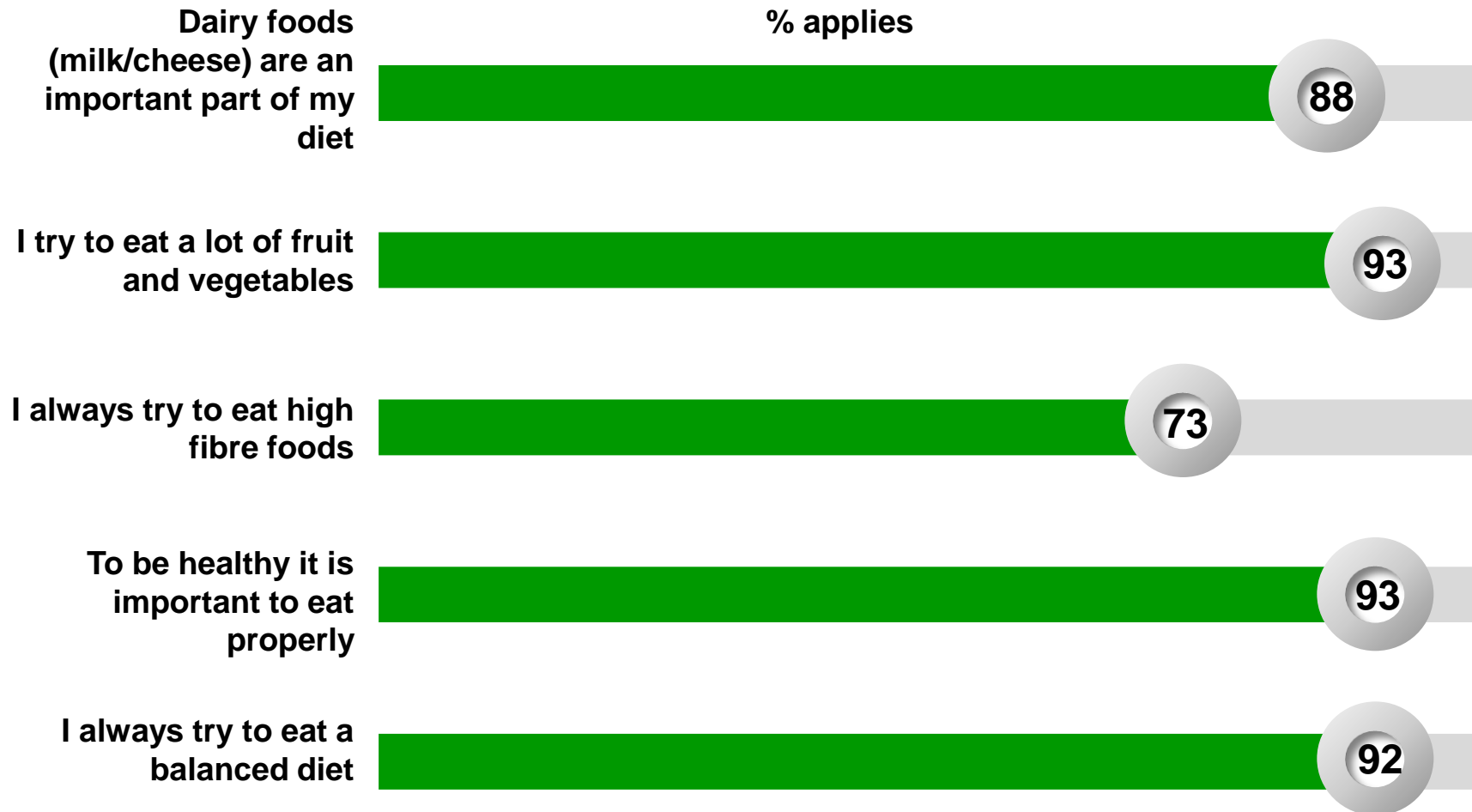
***I eat at least 5 portions of fruit and veg per day***



France ranks in the top three for efforts to eat the recommended '5 a day'.

In France high-fibre foods are consumed less than dairy and fruit and veg. The French have a very positive attitude when it comes to eating properly.

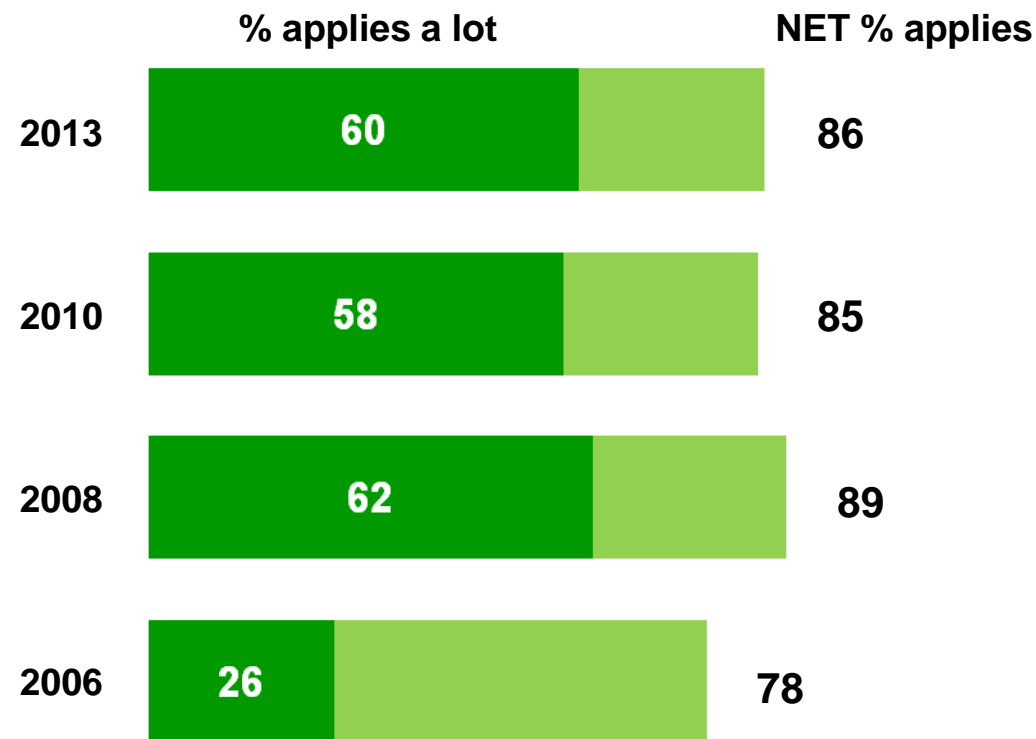
45



Since 2006, efforts to limit the amount of fast food that is consumed by French adults have been strong. The past three years have shown consistent efforts in this area.

46

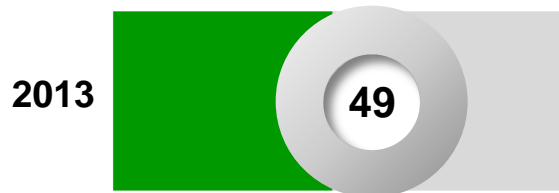
***I try to limit the amount of fast food that I consume***



Spain claims to be making the biggest effort in limiting its fast food consumption. France ranks joint fifth. It seems all countries are making efforts in this area.

'Low fat' options and calorie considerations resonate with approximately half of French grocery shoppers. The idea of 'low fat' being the healthy choice has fallen in popularity. <sup>47</sup>

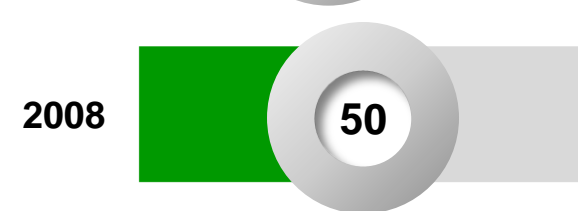
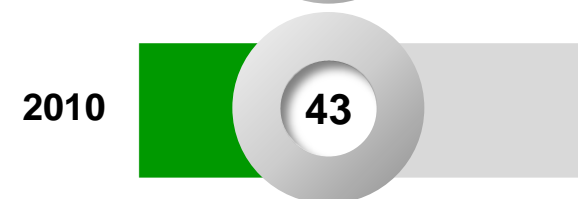
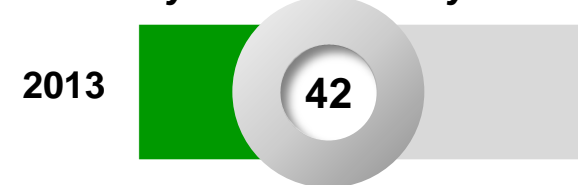
**% applies that *'always look for low fat options when buying food products'***



**% applies that they *'think of the calories in what they eat'***



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

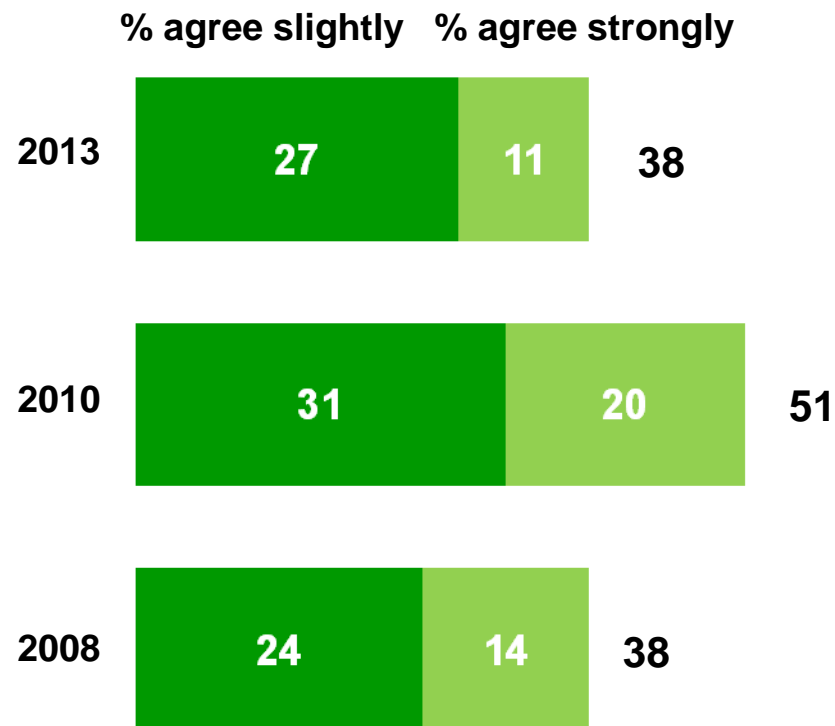


France displays the lowest the tendency to look for low fat products and gives average thought to the calories in the food it eats. It ranks amongst the lowest for agreement that low fat equalling the healthy choice.

Concern about children becoming obese peaked in 2010. In the current wave of research levels of concern were at thirty eight per cent, similar to 2008 levels.

48

***I am concerned about my children becoming obese***



France ranks fifth in terms of concern about one's children becoming obese. The highest levels of concern are in Spain (78%) while the lowest are in ROI & GB (31%).



Fruit and yoghurt are popular components in the lunchboxes of French children. Since 2010, juice has increased in popularity while water has declined.

49

### Content of kids' lunchboxes

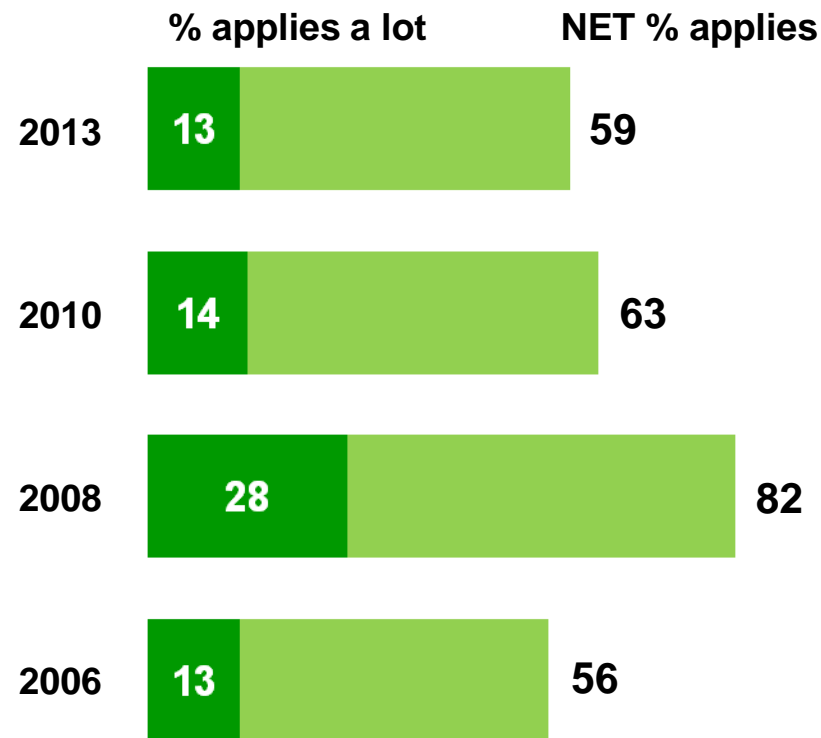
	2010	2013
Sandwiches	36	37
Cereal bars	26	27
Crisps	12	9
Fruit	47	43
Yoghurt	47	45
Cheese Snack	35	19
Juice	40	47
Milk	16	24
Bottle of Water	59	47

France ranks amongst the lowest, alongside Sweden, for the inclusion of sandwiches and fruit in kids' lunchboxes.

The assertion that healthy food is limiting and boring resonates with just under six in ten French adults. The association between healthy and boring has reduced however.

50

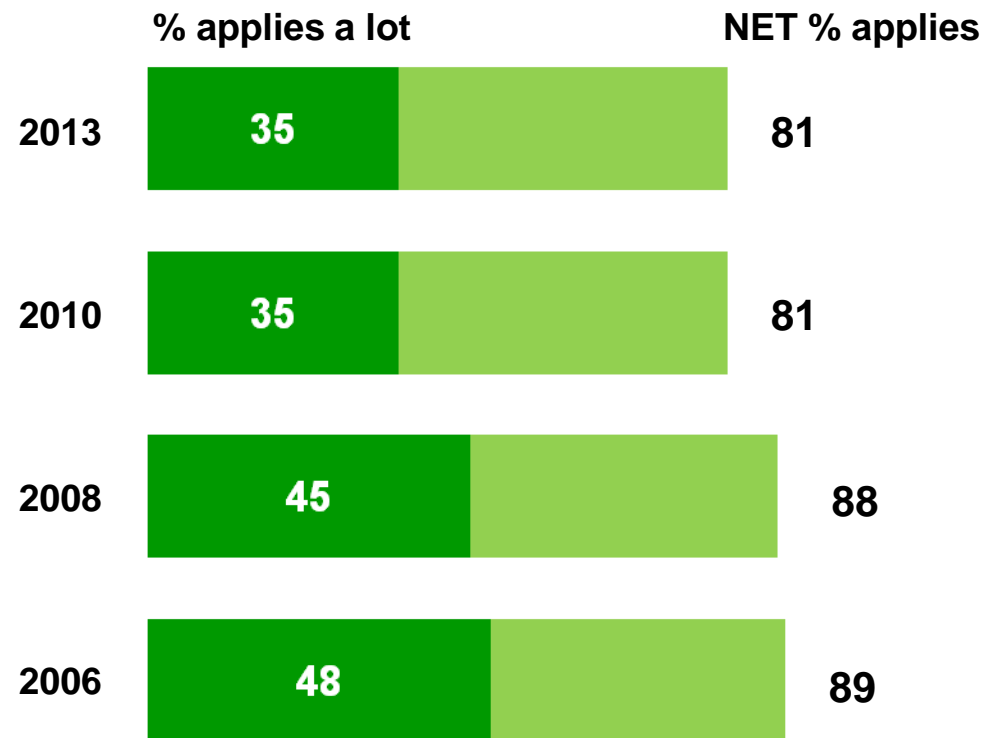
***Choosing healthy food to eat is limiting and boring***



France ranks second for its assertion that healthy food equals food that is limiting and boring. Spain is highest at 69%.

While the preference for having manufacturers help people eat healthy has declined somewhat, there are still more than eight in ten French adults who display this preference.<sup>51</sup>

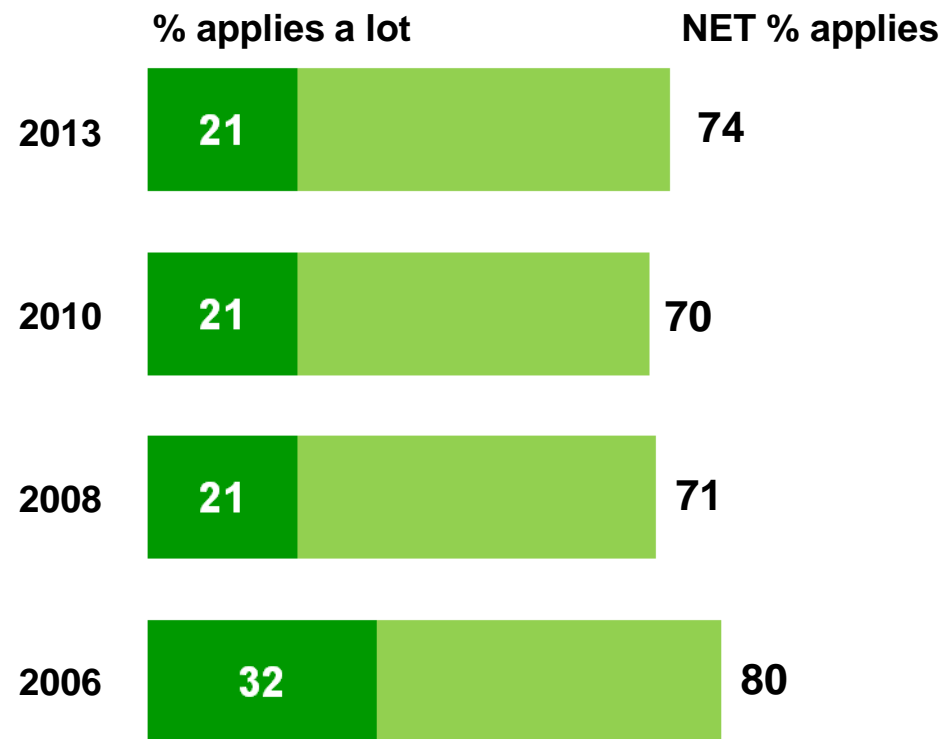
***I would like manufacturers to help me to eat healthy***



Spain, Germany and France rank as the top three countries that would like manufacturers to help them to eat healthy.

Willingness to pay a premium for healthy foods has gained slight ground since the last wave of research but has not resumed to its highs of 2006.

***I am willing to pay a bit more for healthy food and beverages (as long as they taste good)***

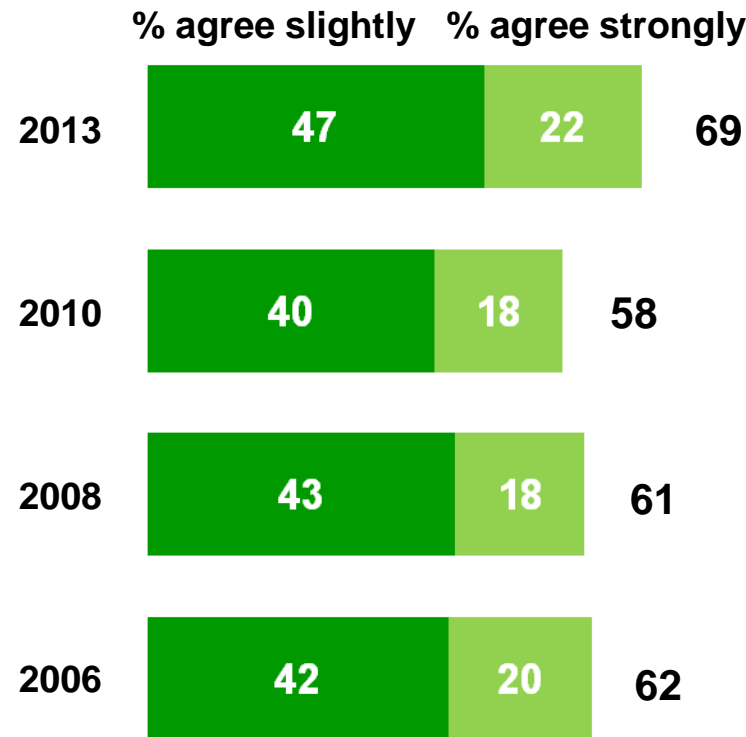


There are six countries in which more than 70% of adults are willing to pay more for healthy food and beverages. France is among these six.

Eating healthy to take control of one's life is a concept embraced by just under seventy per cent; a concept that is at its highest level of popularity since the research began.

53

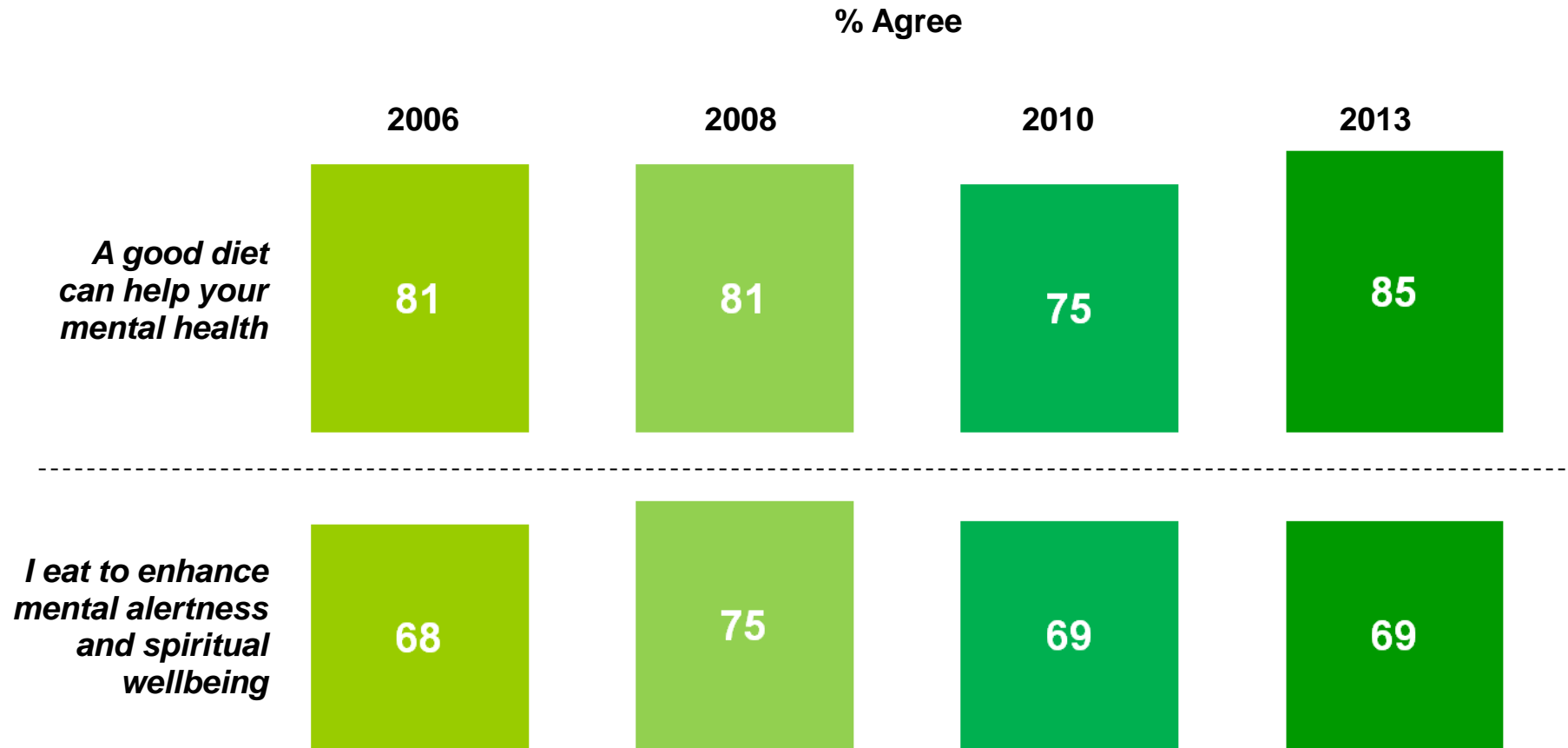
***I eat healthy to take control of my life***



Alongside ROI, France ranks first, in terms of eating healthy to take control of one's life.

The relationship between diet and mental health is being viewed with increasing strength in France. The link between food and spiritual wellbeing is much weaker.

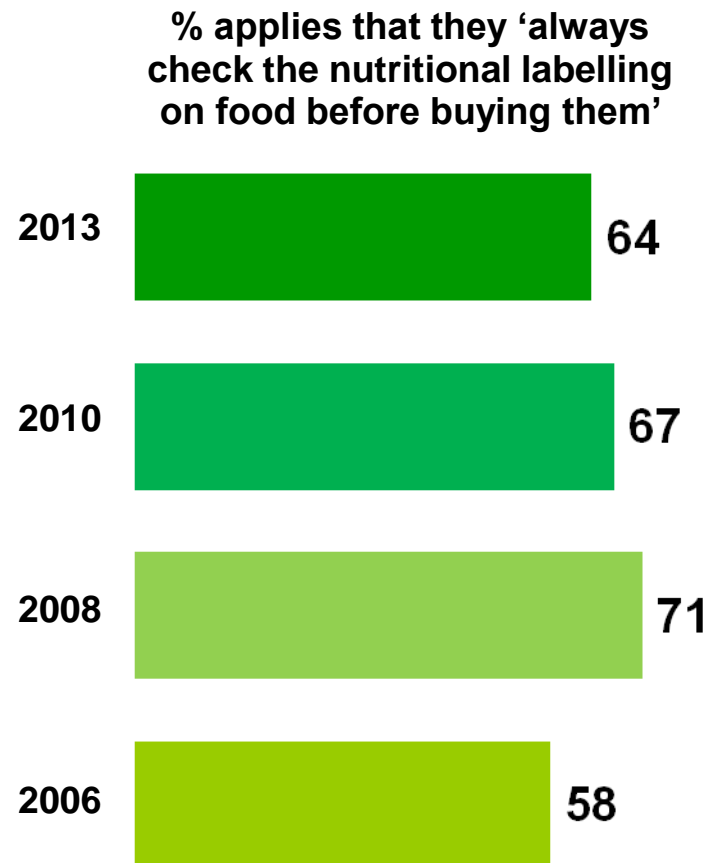
54



France, along with ROI, is one of the strongest supporters of a good diet helping your mental health. It displays average support for the idea that what one eats can be important for wellbeing.

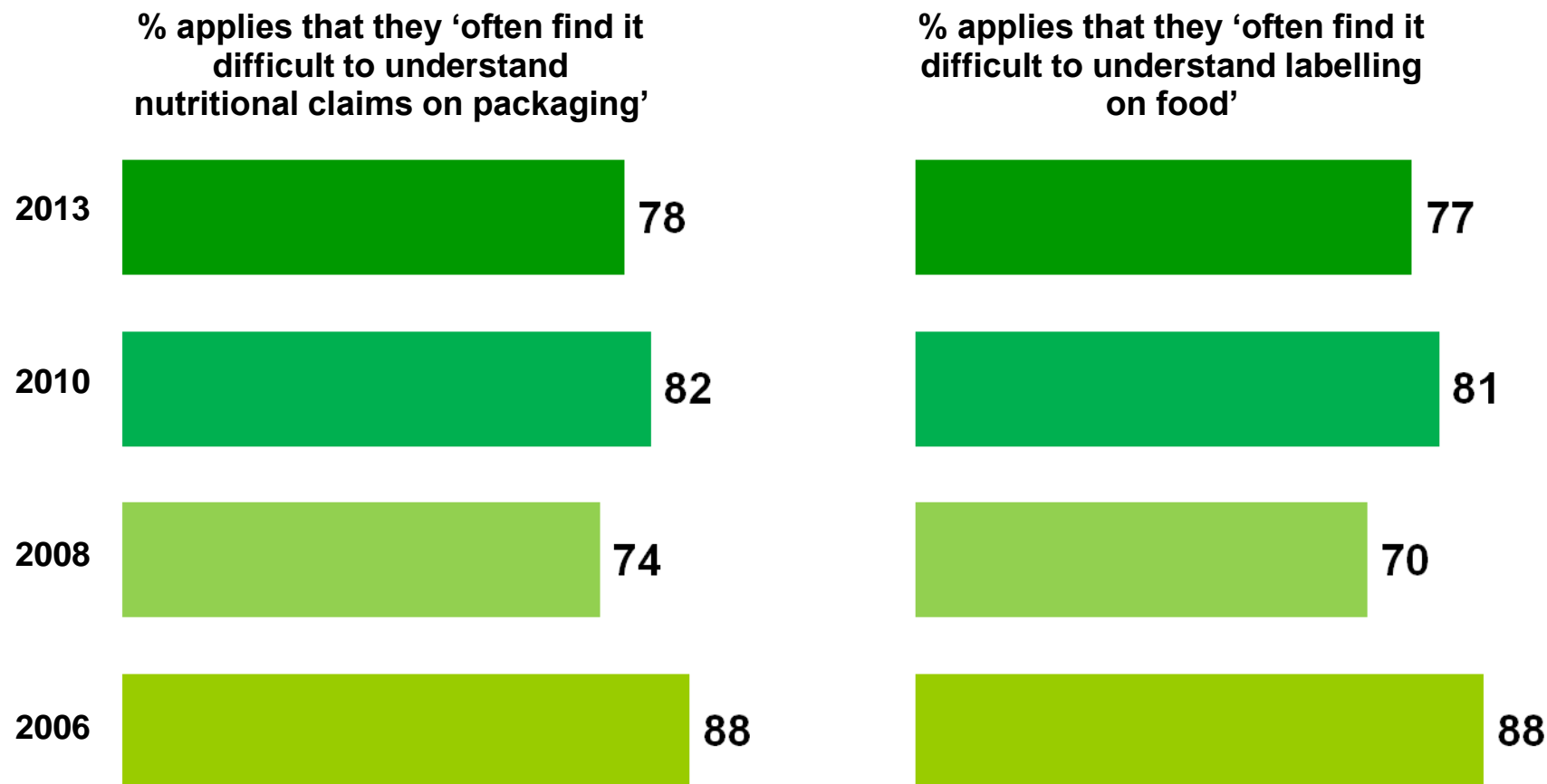
The French grocery shopper of 2008 was more likely than today's grocery shopper to check the nutritional labelling on food before buying it.

55



Compared to other countries, France's tendency to check the nutritional labelling on food before purchase is relatively weak (sixth position).

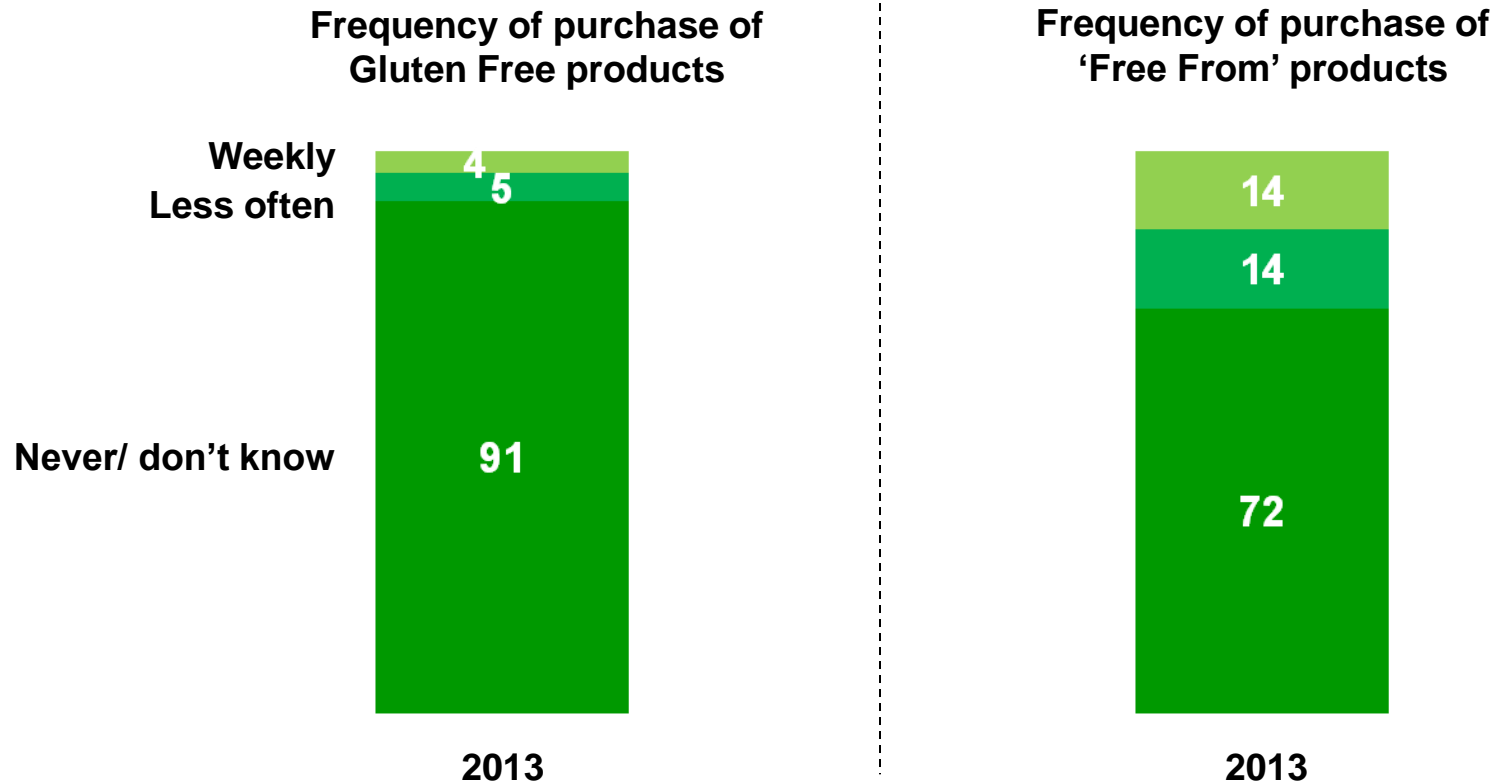
Compared to 2006, the French are finding it less difficult to understand nutritional claims on packaging and food labelling. However, improvements are still critically needed. 56



France ranks amongst the highest countries for having difficulty in understanding *both* the nutritional claims on packing and labelling on food, behind Spain.



Gluten free products are far less popular than 'free from' products. Weekly purchases of 'free from' are at fourteen per cent compared to just four per cent for gluten free.



Purchases of gluten free products in France is very similar to most other countries, with the exception of Spain and the US where purchases are much higher. France ranks third for purchases of 'free from' food.

# TAKEAWAYS



# # 1

## Food matters

- Confidence & enjoyment are high but some of the fun has been lost.
- Scratch cooking is popular.
- Ready prepared ingredients have been reduced.
- Demand for something more than just convenience.





# #2

## Busy lives have key demands

- Convenience foods may not be the best food, but they have their place.
- Demand for ease and speed without compromise.
- Want healthier options/ local options/ sustainable options when making food decisions.



# #3

## Providing food with a story

- Transparency in sourcing and production matters.
- Food needs to be about more than just its basic components – its background counts.
- Awareness of food terminology is growing but motivations to purchase could be enhanced further.



# #4

## Shop clever, shop smart

- Value for money rather than price dominates the grocery shopping psyche.
- Shoppers are discerning, savvy and measured. Time is important.
- Relatively strong online grocery shopping activity.
- Momentum yet to build behind mobile technology as food inspiration.





# #5

## Active health seekers

- Active desire to maintain a healthy diet and interact with food in a healthy way in order to reap a variety of benefits.
- Relatively weak relationship with 'low fat' options.
- Need more convincing that healthy foods are exciting and interesting.
- Seeking help from manufactures.



# #6

## Making it easier

- High levels of difficulty in understanding food information/ labelling.
- Current high propensity to search for information may wane if difficulties persist.





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## **French** **Consumers & Their Food**

