

# PERIscope2013



## German Consumers & Their Food



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.
- Online survey conducted amongst 1,000 adults aged 18+ in Germany.
- 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

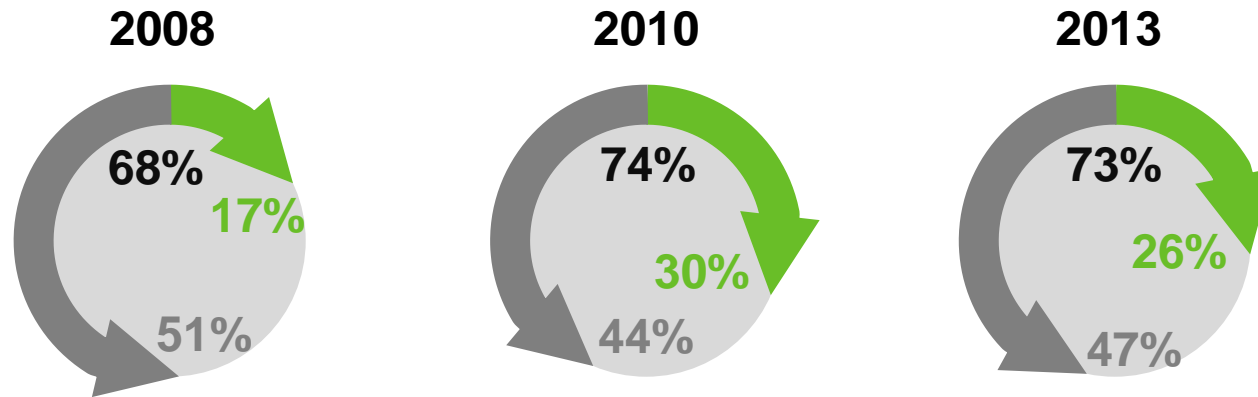


The German relationship with cooking has continued to develop positively since 2008. The amount of fun associated with cooking has progressed considerably.

4

 **Good Fun**     **A Passion**

### Attitude towards cooking

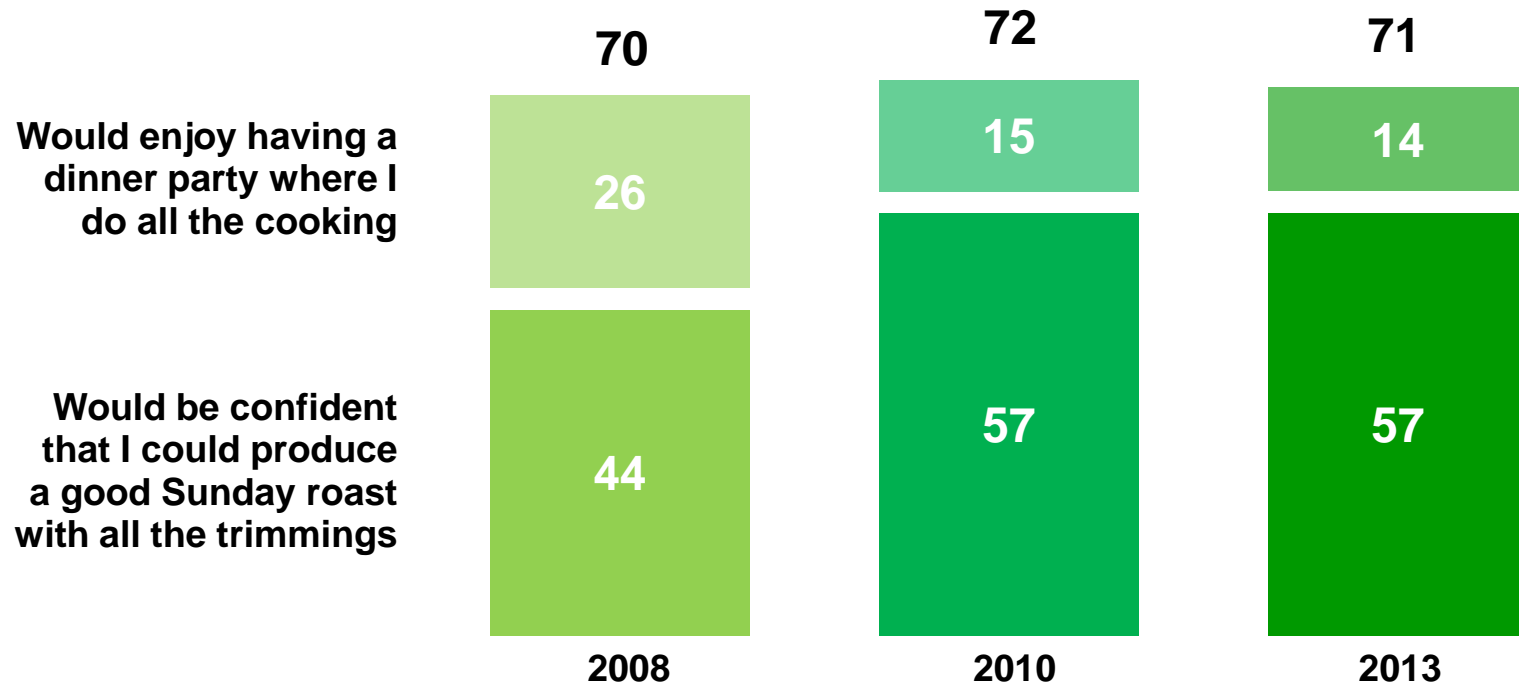


When it comes to cooking, the Germans consider themselves to be the most passionate. They also have the most fun of any of the other countries in the PERIscope 2013 study.

Since 2008, the proportion that are comfortable as a dinner party host has fallen significantly. Despite this, overall levels of culinary expertise have remained stable.

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### Level of cooking expertise



Germany's cooking expertise (on the basis of dinner party hosting and producing meals with all the trimmings), ranks in at joint third. However, its confidence regarding dinner parties is one of the lowest in the study.

Just under three quarters of Germans prepare their meals from scratch few times a day/few times a week , a relatively unchanged proportion since 2008.

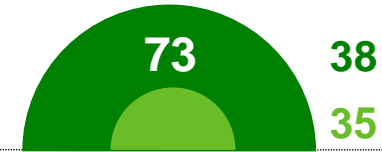
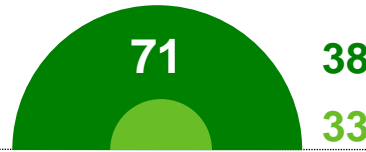
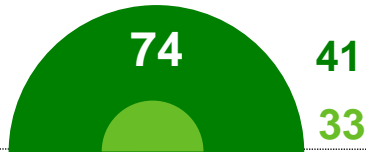
6

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

**2008**

**2010**

**2013**

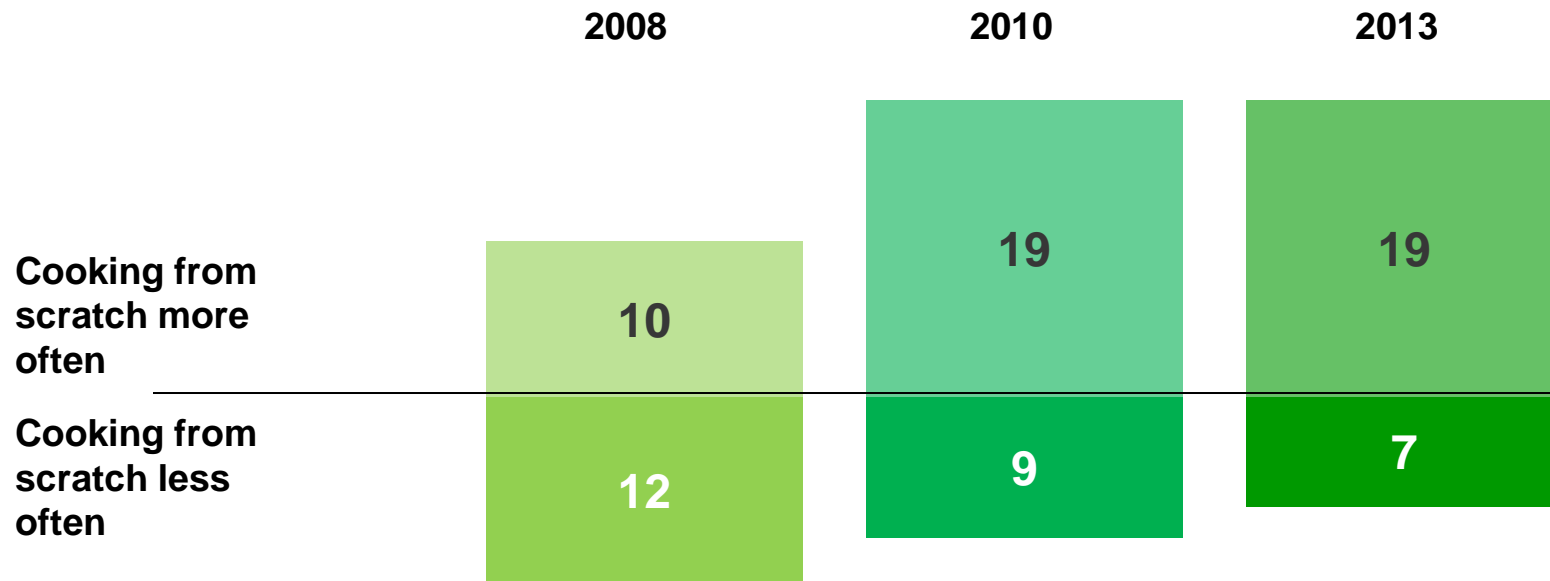


Compared to other countries in the PERIscope 2013 study, Germany ranks 6<sup>th</sup> for scratch cooking. NZ (81%) ranks first.

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

7

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

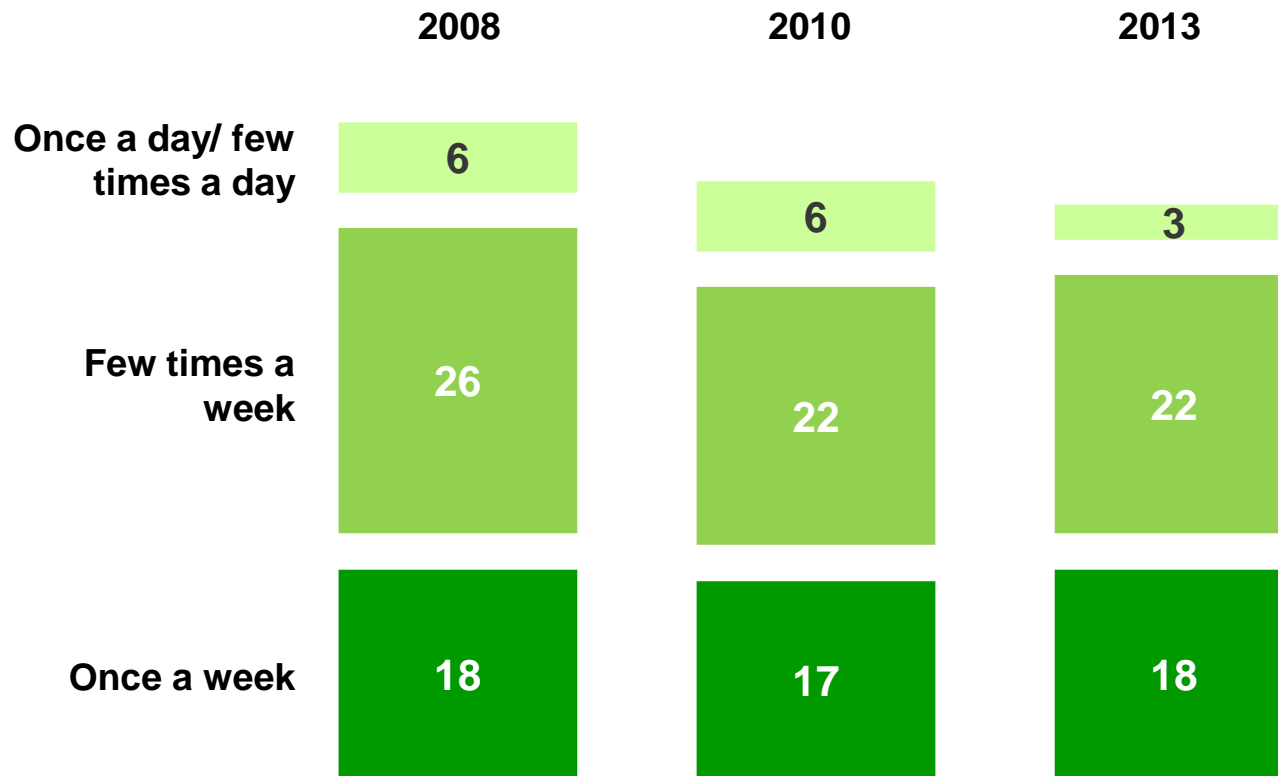


Germany is behaving similarly to many other countries when it comes to scratch cooking. The Spanish have increased their scratch cooking the most.

Since 2008, Germany has reduced the amount of ready prepared meal components used in the meals that it cooks on a daily/ weekly basis.

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### Use of ready prepared ingredients



In terms of daily/ weekly usage of ready prepared ingredients, Germany ranks in the bottom three countries, alongside France and Belgium.



Attendance of cooking classes in Germany has shown a marginal increase in the past three years. The proportion entertaining at home more often remains the same.

9

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

**2013** **7**

**2010** **5**

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

**38**

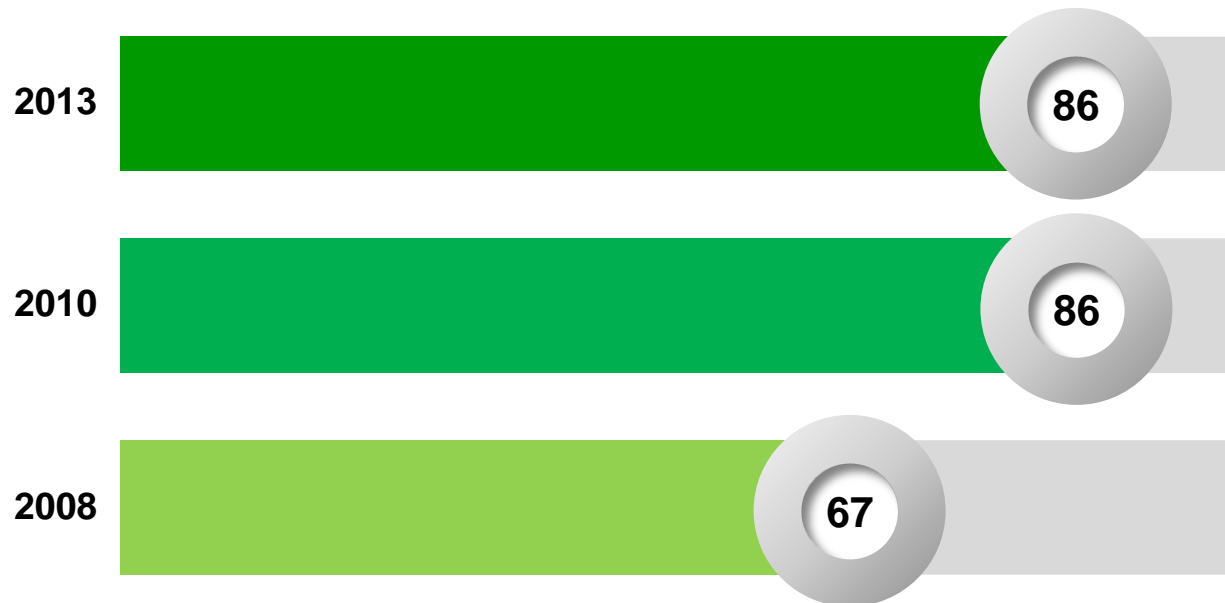
**39**

Germany compares similarly to countries like Sweden, Netherlands and the US in terms of cookery class attendance. Regarding entertaining at home, Germany ranks in third place overall.

In Germany, the enjoyment obtained from cooking a great meal has increased significantly since 2008.

10

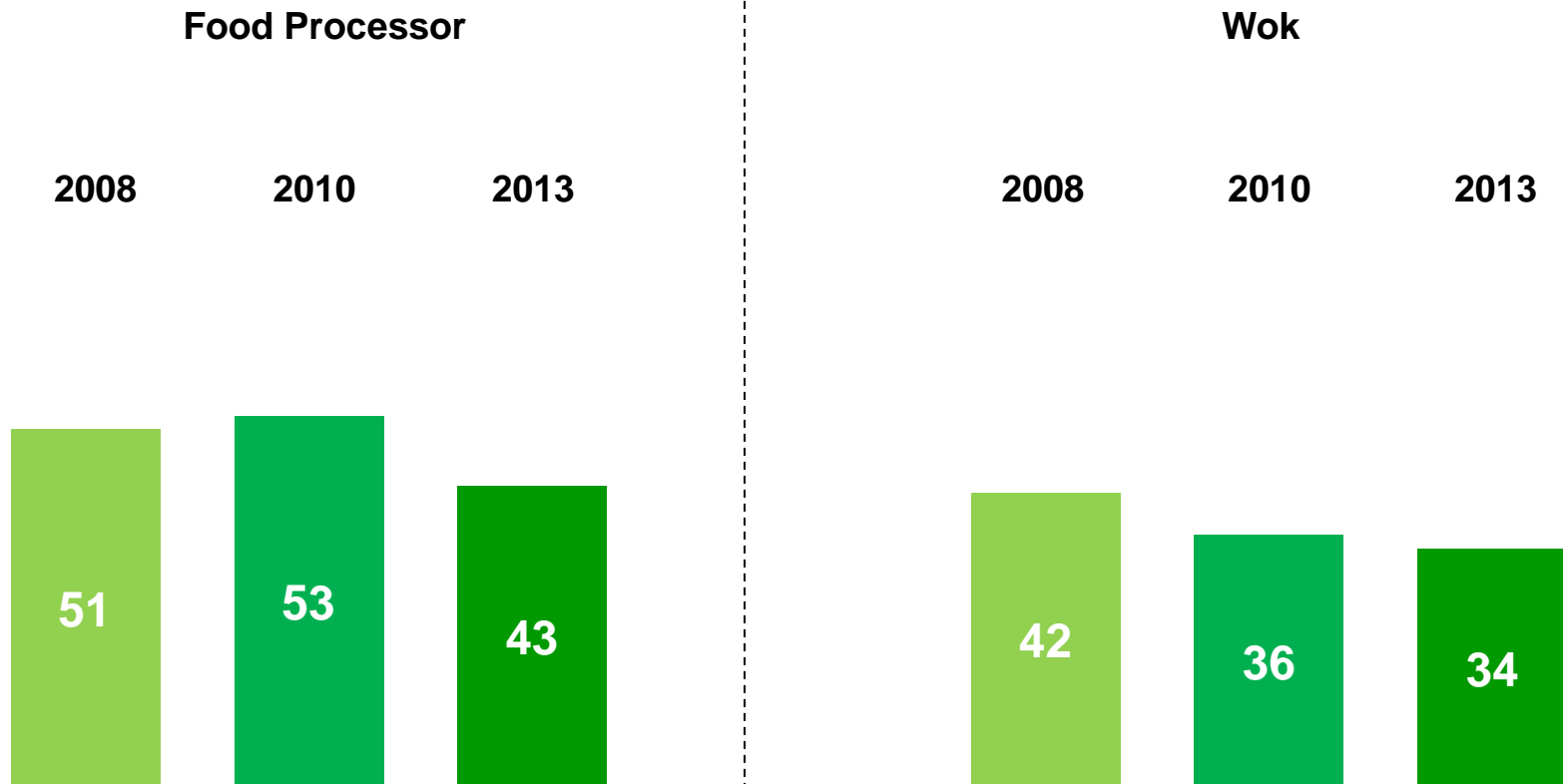
**% applies that they *'enjoy cooking and being able to create a great meal'***



Germany and NZ (87%) display the highest enjoyment levels associated with creating a great meal.

Ownership of food processors has declined in recent years. The same can be said for woks, which are now owned by one third of all Germany adults.

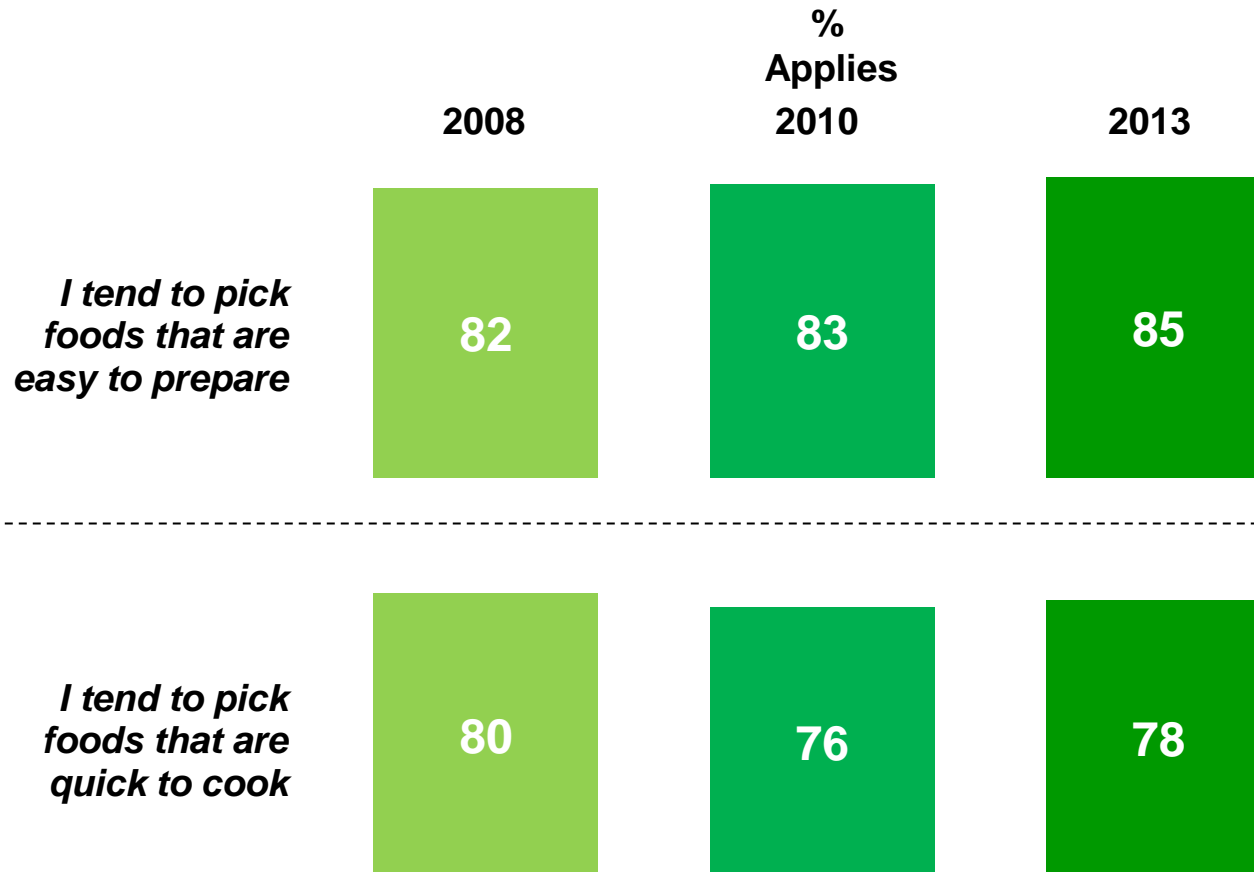
11



Germany displays a relatively average ownership level of food processors. It fares similarly to Sweden and France regarding ownership of woks, but is amongst the lower ownership cohort.

Demand for food that is easy to prepare and quick to cook has continued to be paramount in German food attitudes.

12

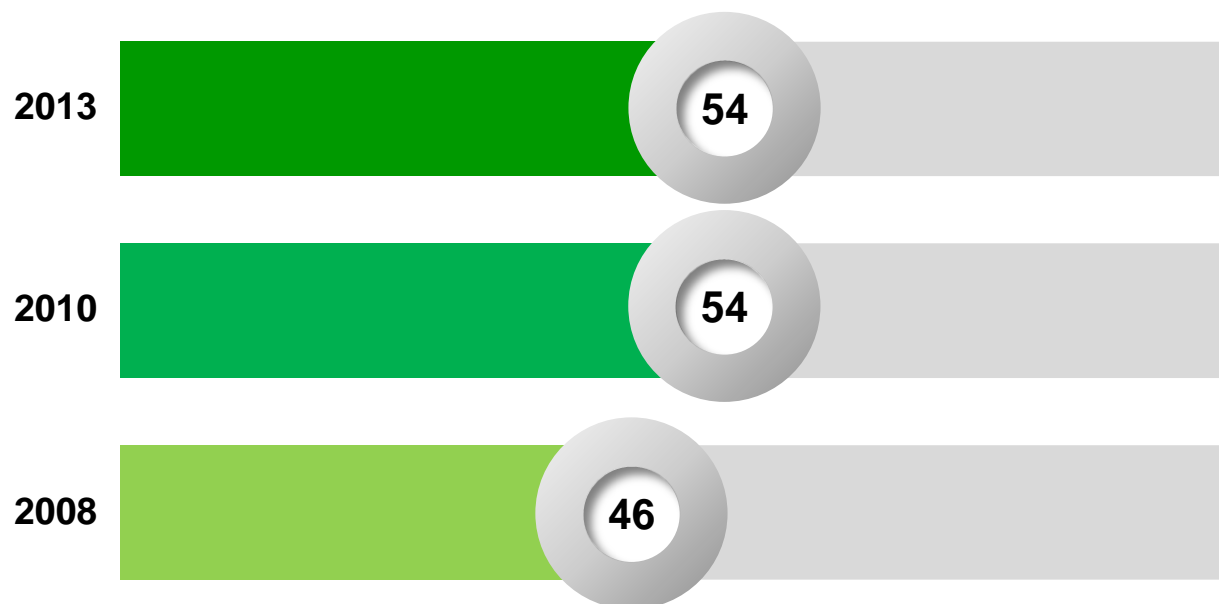


Germany ranks joint third when it comes to picking foods that are easy to prepare and fourth in its tendency to pick foods that are quick to cook.

More than half of Germans claim to use a lot of ready to eat foods in their households, a slight increase on 2008 levels.

13

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

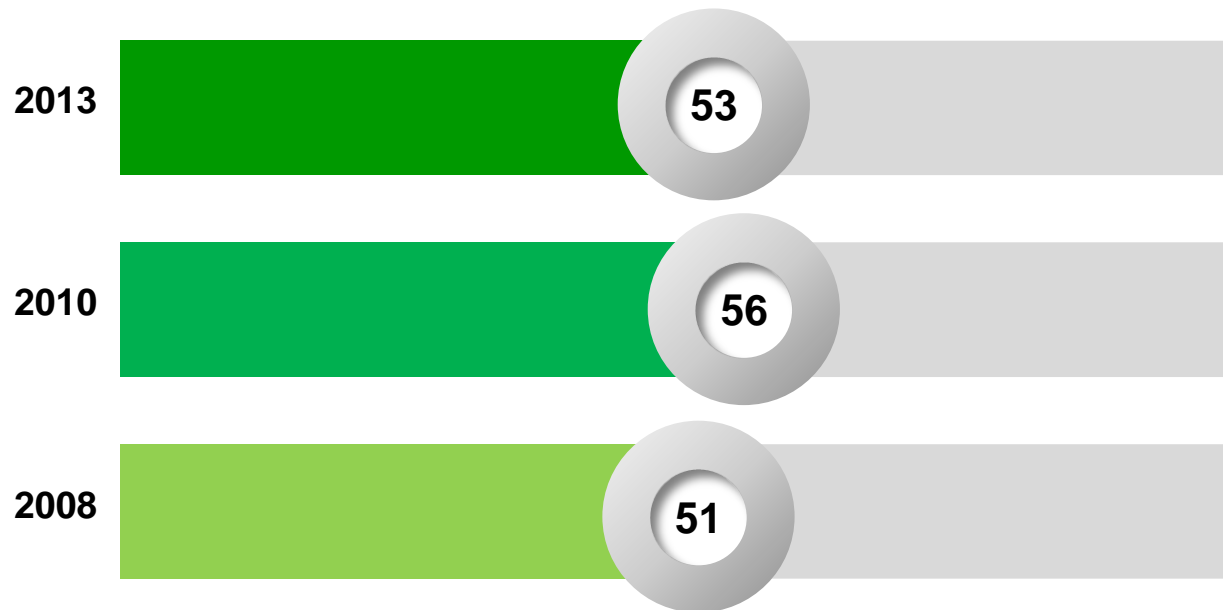


Germany displays relatively high use of ready to eat foods. It ranks third overall, behind that of the US (68%) and Spain (66%).

Not much has changed since 2008 when it comes to the proportion who often eat ready prepared foods in their households.

14

**% applies that they *'would often eat ready prepared/ convenience meals'***

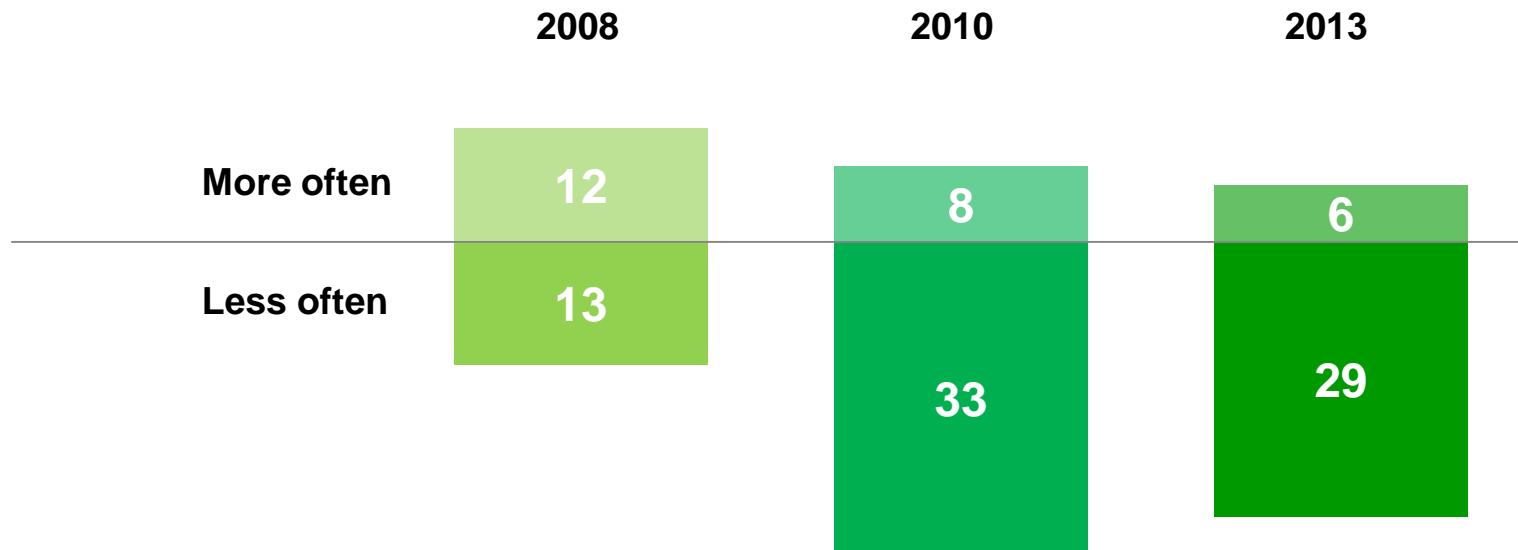


Eating convenience meals has average popularity in Germany. Germany ranks fifth overall while the US (71%) and Spain (69%) rank the highest.

Just under three in ten Germans claim to be eating ready meals/ convenience meals less often than 12 months ago, a much improved situation since 2008.

15

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

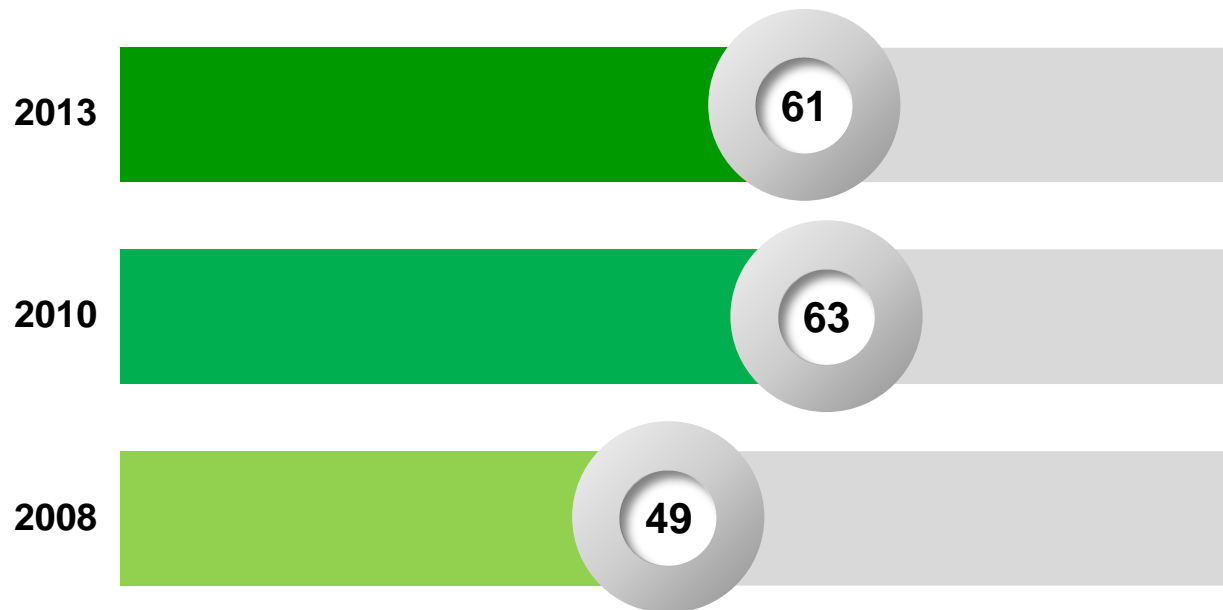


Germany compares most similarly to NZ in its consumption of ready meals/ convenience meals in the last 12 months. It fares better than GB and the US but is somewhat behind the other countries.

The proportion who consider convenience meals to be a good substitute for home cooked meals when time is limited has increased considerably since 2008.

16

**% agree that convenience meals... 'are a good substitute for home cooked meals when time is limited'**



Germany displays one of the highest levels of agreement with the idea that convenience meals can be a good substitute for home cooked meals.



Germans associate convenience foods with lower levels of value and poorer levels of taste, than in 2008. However, these foods are not viewed as more expensive than before.<sup>17</sup>

Convenience foods.....

... are expensive

**52%** → **49%**  
2008                      2013

... are good value for money

**36%** → **29%**  
2008                      2013

... have poor quality ingredients

**28%** → **28%**  
2008                      2013

... taste great

**44%** → **39%**  
2008                      2013

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

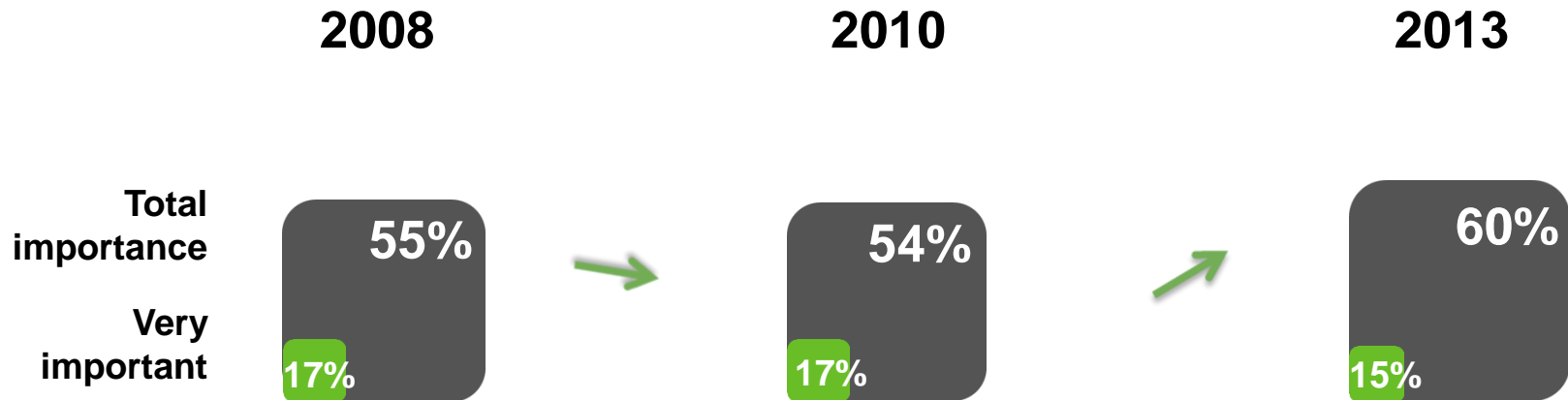
# Back To Basics



The overall importance of local food has risen in the past three years, despite a slight fall in those who consider 'local' to be 'very important'.

19

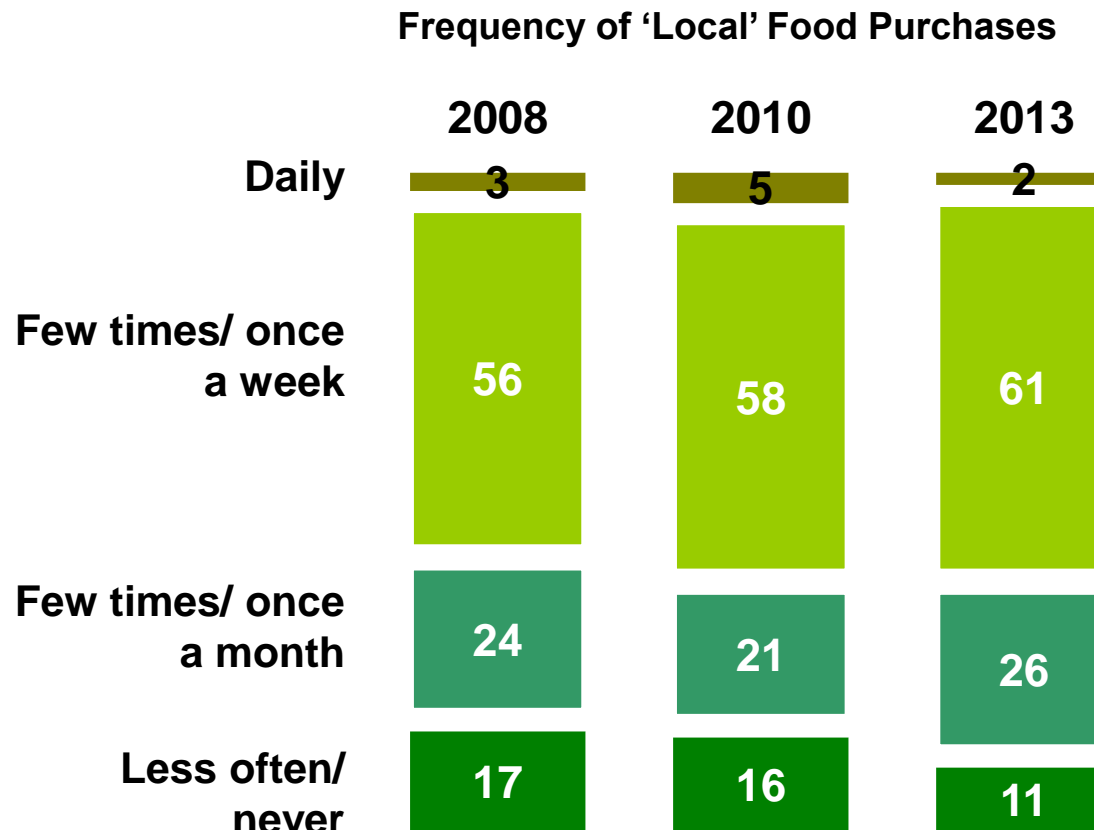
### Importance of buying local produce when shopping



France places the most importance on buying local. Germany's attitude towards local, places it just inside the top five.

The momentum of buying local food more frequently continues to build on 2008 levels. Just one in ten now buy local less often(than monthly)/never.

20



Sweden, Spain, Germany, and NZ are the most frequent purchasers of local food purchases on a daily/weekly basis.

In Germany, 'local food' is typically viewed as food that is made either within close physical proximity or that which is available in farmers' markets.

21

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

**45%**

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

**42%**

*... available in farmers' markets*

**40%**

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

**Just over one third believe local food is food that is...**

**37%**

*...made within the province that I live*

**36%**

*...made within the county that I live*

**Very few believe local food to refer to food that is ...**

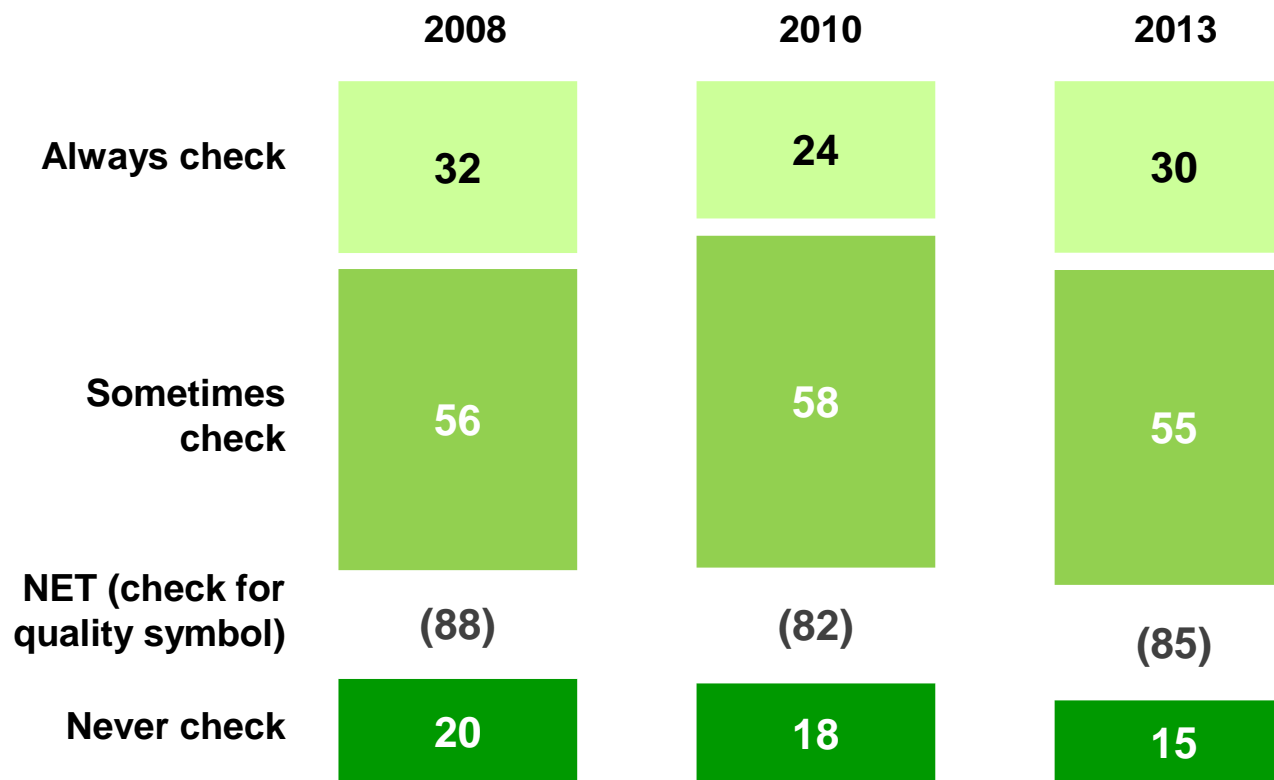
**3%**

*... made within Europe*

The routine of checking for the country of origin label is well established amongst German grocery shoppers and has shown little change in the past five years.

22

### Checking for Country of Origin label

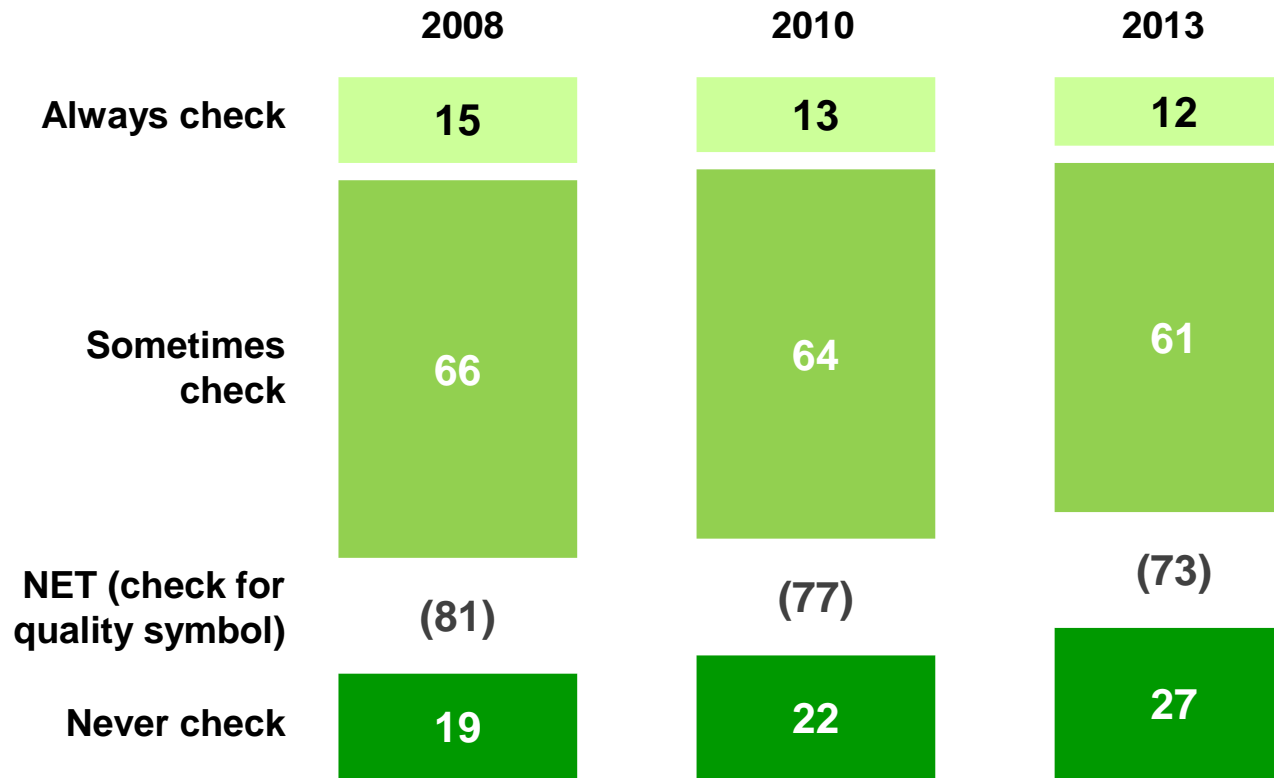


Germany ranks second in terms of checking for country of origin, just ahead of Spain(84%) and France (83%). Sweden ranks first (92%).

In Germany, the process of checking for the symbol of quality has fallen over the past five years. The proportion who 'never check' is now more than one in four.

23

### Checking for Symbol of Quality label



Germany ranks as fourth, behind Belgium (74%), France (76%), ROI (76%) and Spain (82%) for checking the symbol of quality on food products.

There has been a slight decline in the importance placed on eating dinner together as a family. However, at more than eight in ten, it remains important to the majority.

24

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



Overall, spending time eating dinner together as a family is important in all countries. However, compared to all other countries in the PERIscope 2013 study, this is least important to Germany and GB.



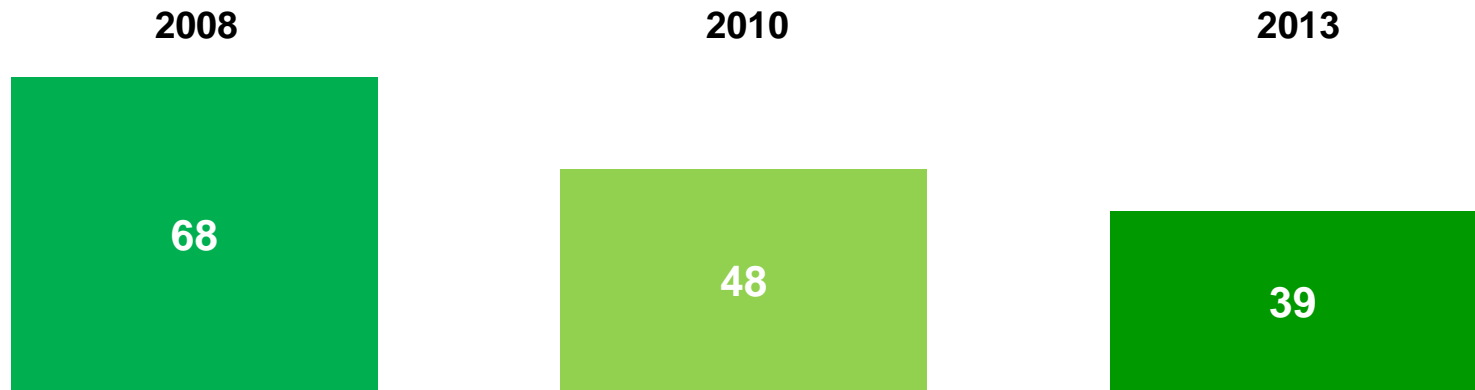
# Food & Sustainability



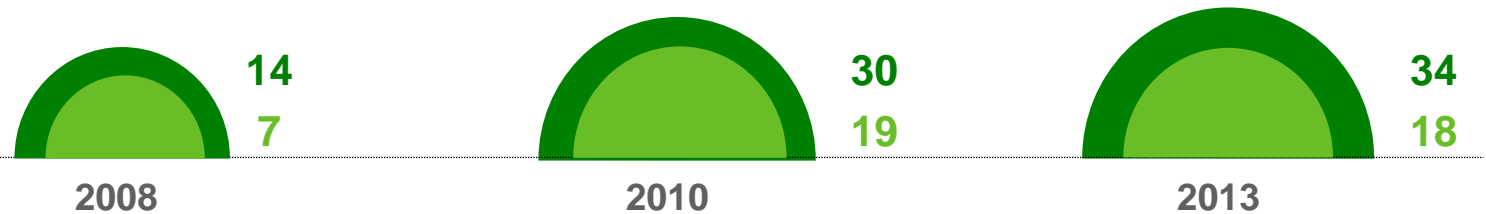
Awareness of food miles has shown a significant advancement since 2008. The percentage buying foods with low food miles has also progressed considerably.

26

### % never heard of food miles



### % 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

Germany ranks amongst the highest for awareness of food miles. It ranks joint first in terms of purchases.

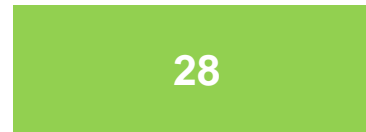
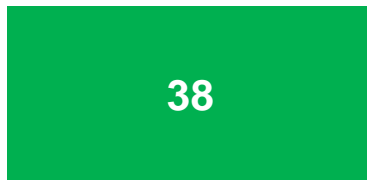
Sustainability is now a very well known term in Germany. The proportion claiming to buy foods with sustainable features has been risen substantially since 2010. 27

**% never heard of sustainability**

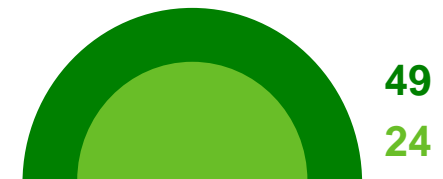
**2008**

**2010**

**2013**



**% who buy foods with sustainable features**



**2008**

**2010**

**2013**



*TOTAL % who buy foods with sustainable features*



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

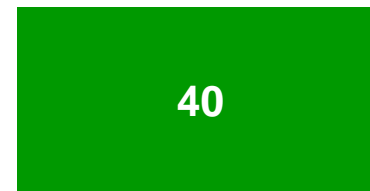
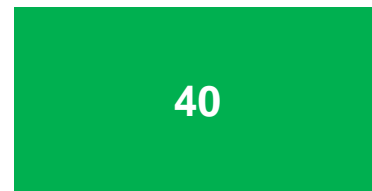
Germany has the second highest awareness of the term sustainability and ranks as the highest purchasers of 'sustainable' products, followed closely by France, Belgium and NZ.

Compared to 2008, those claiming to have never heard of carbon footprint has shown no signs of advancement. Yet, here has been a slight growth of low footprint purchases. <sup>28</sup>

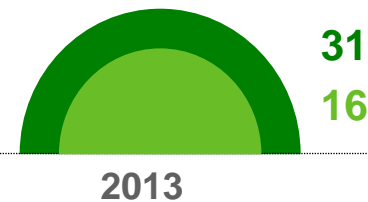
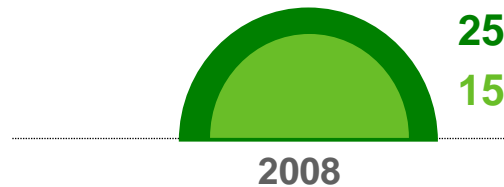
### % never heard of carbon footprint

2008

2013



### % who buy foods with low footprint



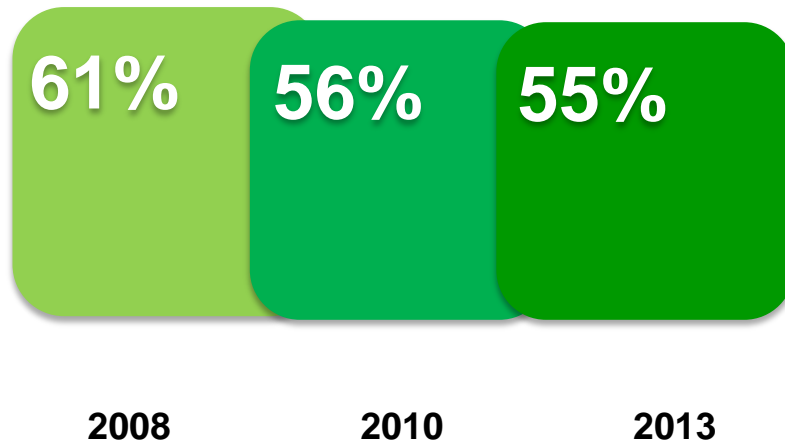
 **TOTAL % who buy foods with low footprint**

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

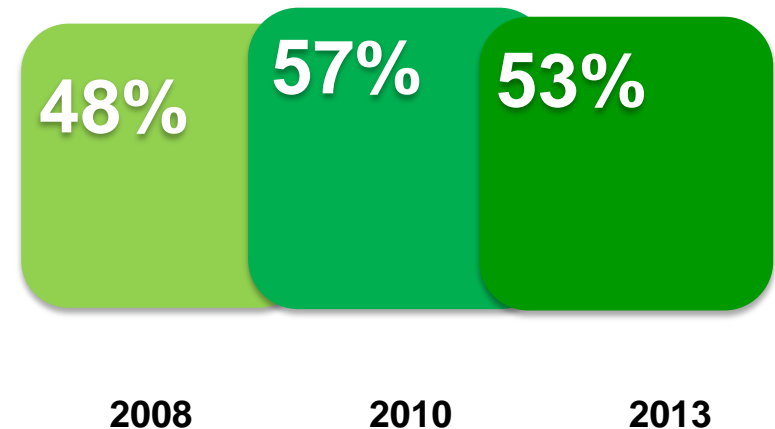
Germany's awareness of carbon footprint is one of the lowest of the study. Its purchases of low footprint products are average compared to Belgium (41%) and Spain (19%).

The momentum behind being environmentally conscious and buying from companies who are environmentally aware is beginning to show signs of decline in Germany.

**% 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**

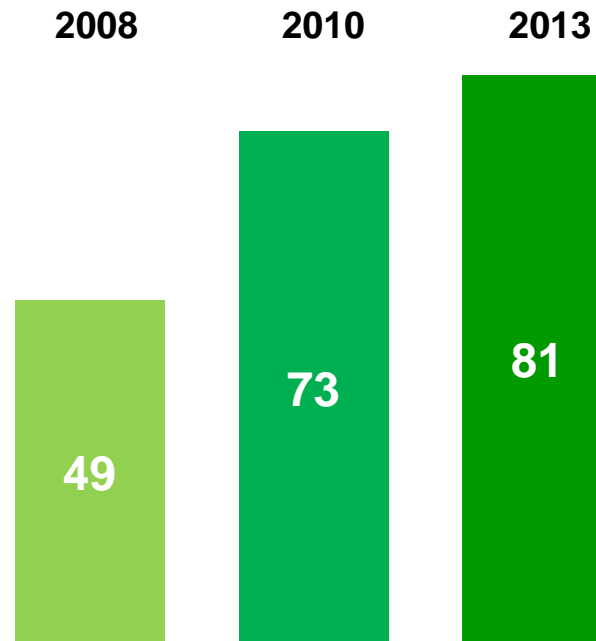


Consumer consciousness for environmental issues and the practice of buying from environmentally aware companies is average in Germany compared to other countries in the PERIscope 2013 study.

Buying in smaller packs to avoid waste has become an extremely popular practice in Germany in the past five years.

30

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

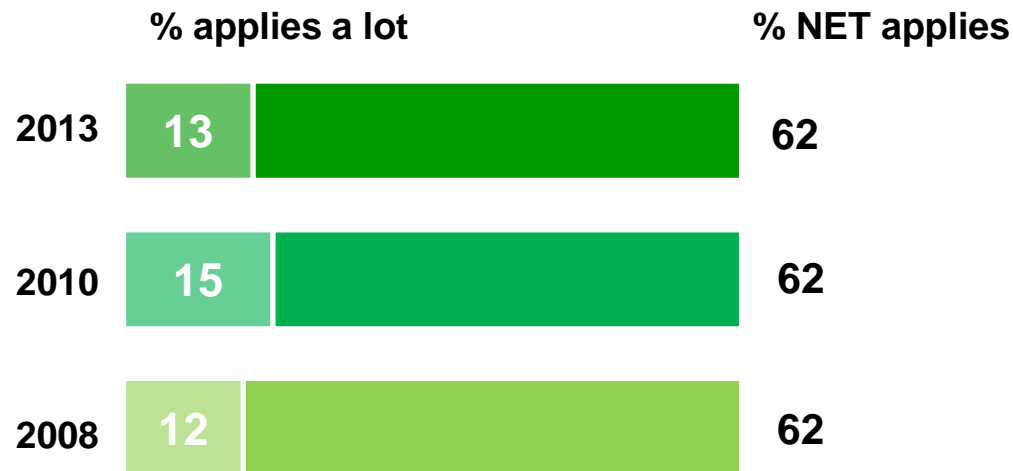


The Germans are the most conscious of cutting down on food waste.

Overall efforts to buy Fair Trade products by Germans have remained unchanged in five years.

31

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



The Germans rank fourth overall when it comes to efforts to buy Fair Trade products. Spain (83%) claim to try to buy these products the most while the US (45%) are the least inclined.

# Shopping Around

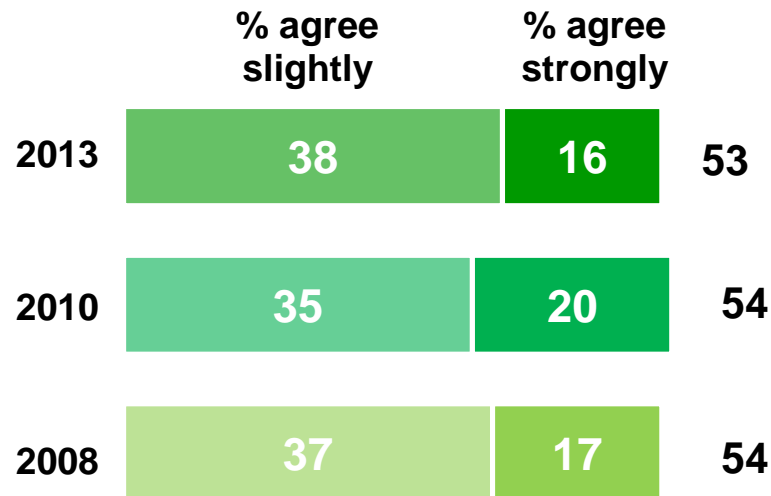




The importance placed on price when grocery shopping has remained unchanged in Germany in the past five years.

33

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

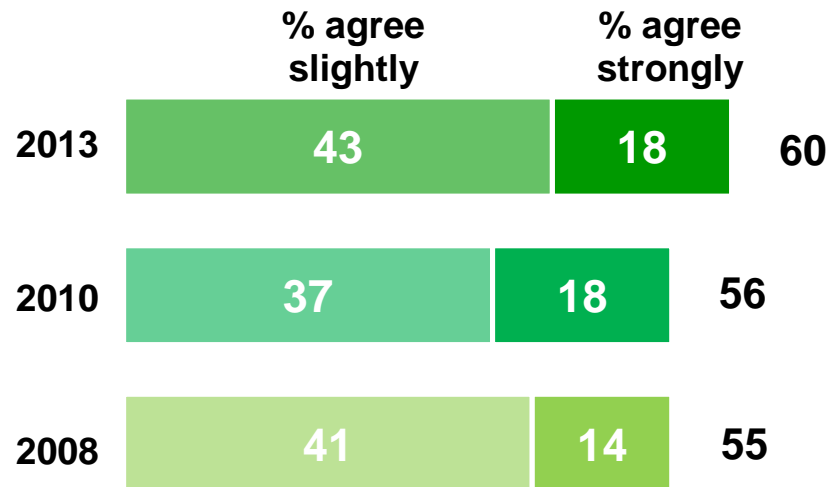


Looking for price as a 'first thing' is not a defining behaviour of German grocery shoppers.  
The Germans rank eighth overall with regard to agreement with this statement.

The practice of placing the quality of fresh food ahead of price has seen a slight increase in Germany compared to five years ago.

34

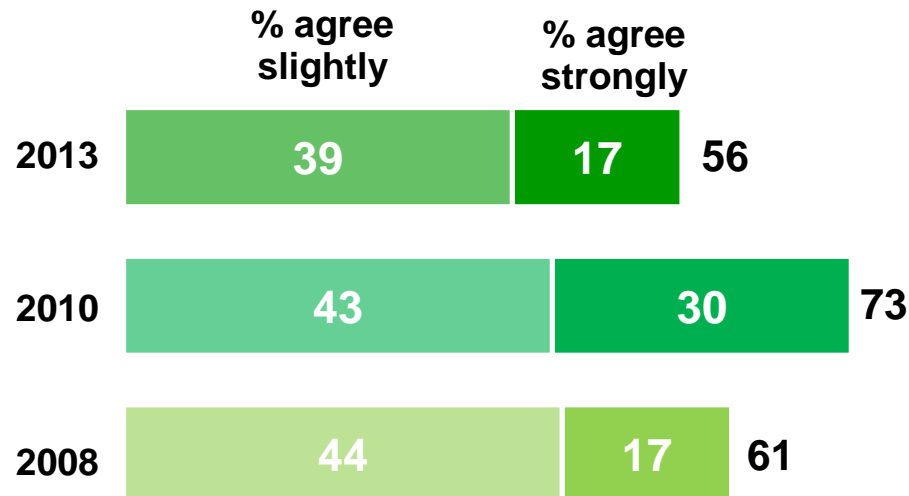
***Quality of fresh food is more important than price***



Germany displays a relatively weak level of agreement with the idea that quality is more important than price. It ranks seventh overall, considerably behind ROI (79%) who has the highest level of agreement.

Getting value for money in the same store is important for more than half of German grocery shoppers. Yet, compared to 2010, this behaviour has declined considerably.

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

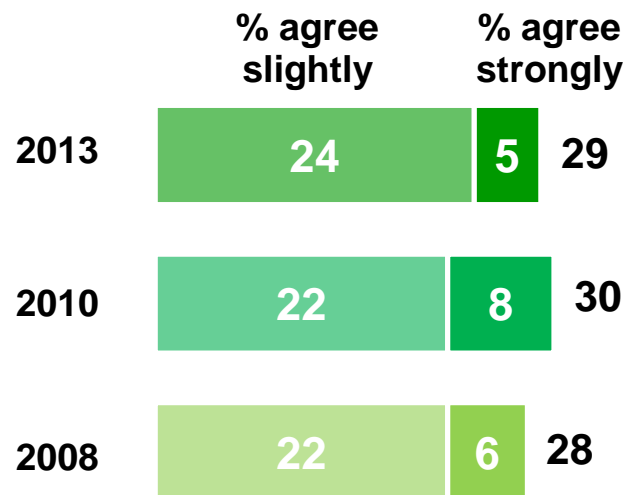


Obtaining value for money in the same store is least popular in Germany. The German behaviour is significantly different to NZ (84%) and ROI (81%).

The concept of paying more for better customer service has not experienced any change in attitude in Germany in the past five years.

36

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

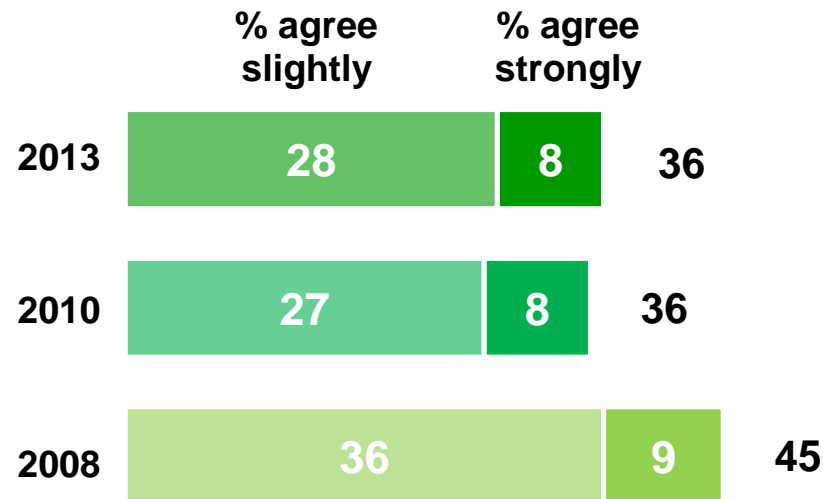


Germany ranks seventh in terms of willingness to pay a premium for superior customer service. Spain (48%) and Sweden (47%) record the highest scores.

Buying products on impulse has become a less common feature amongst German grocery shoppers since 2008.

37

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

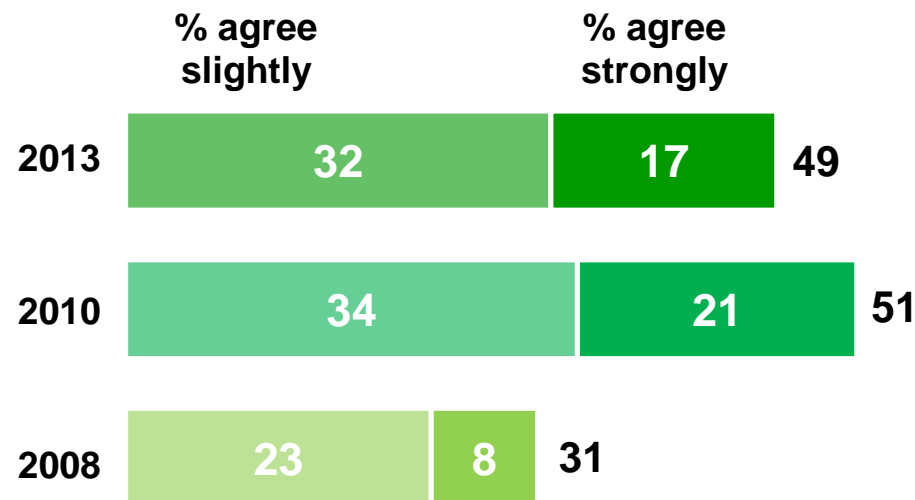


Germany ranks seventh in terms of its susceptibility towards buying cheap products. GB (54%) is the most likely to respond impulsively.

Spending time looking for a bargain is a shopping behaviour that has ascended considerably in Germany since 2008.

38

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



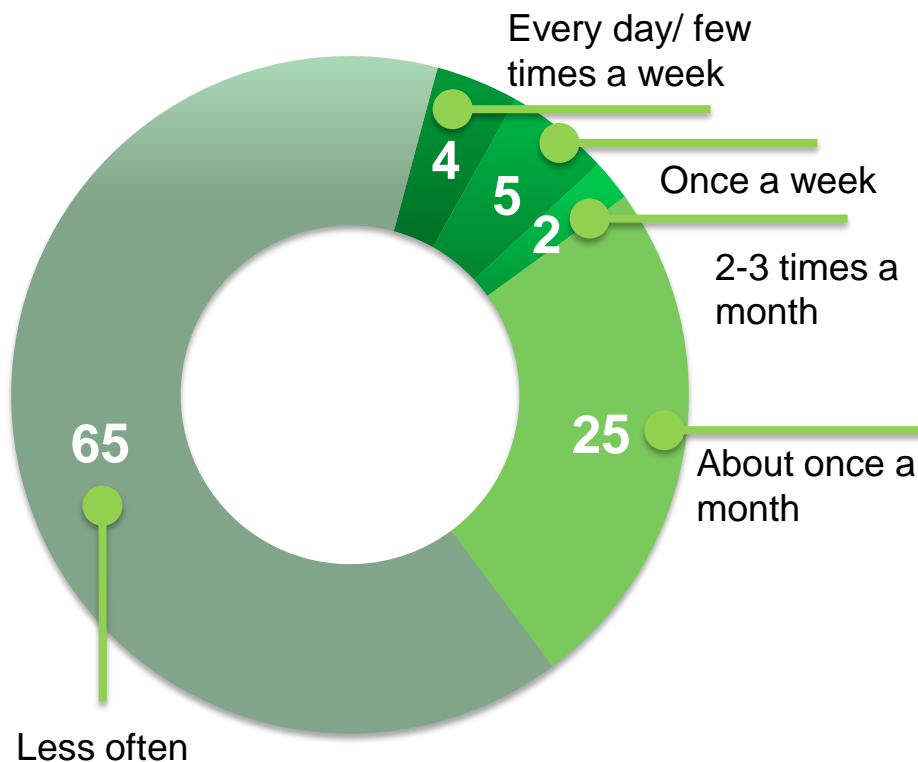
Germany still remains a long way behind the US (63%) when it comes to bargain hunting. It ranks seventh overall.

Less than 2 in 10 German adults have ordered their grocery shopping online. The majority of these shop online for grocery less often than once a month.

39



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

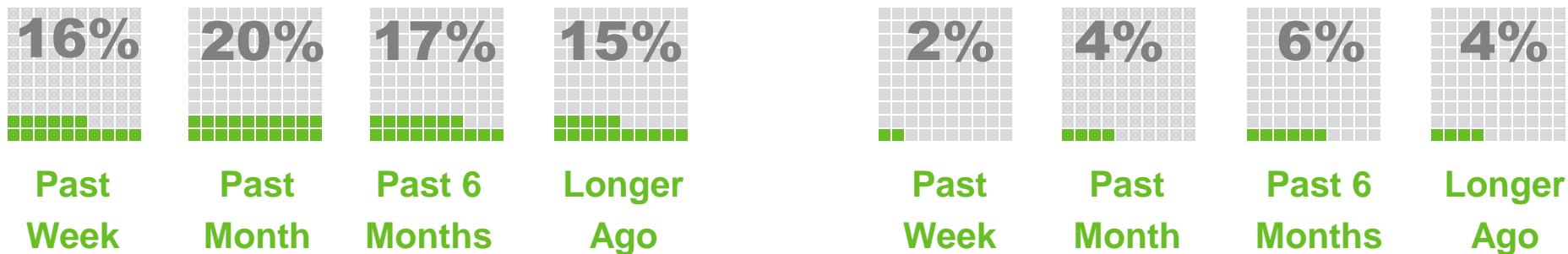


Germany has the fourth highest percentage of people who have ordered their shopping online. However they are considerably behind Spain (30%) and GB (28%).

Currently, using the internet to access recipes is significantly more popular than downloading food apps. Technology is facilitating more traditional information searches. <sup>40</sup>



Most recent download activity



Germany is in the top five for the percentage of people who have downloaded a recipe. It ranks in the bottom three for the percentage who have downloaded a Food App.



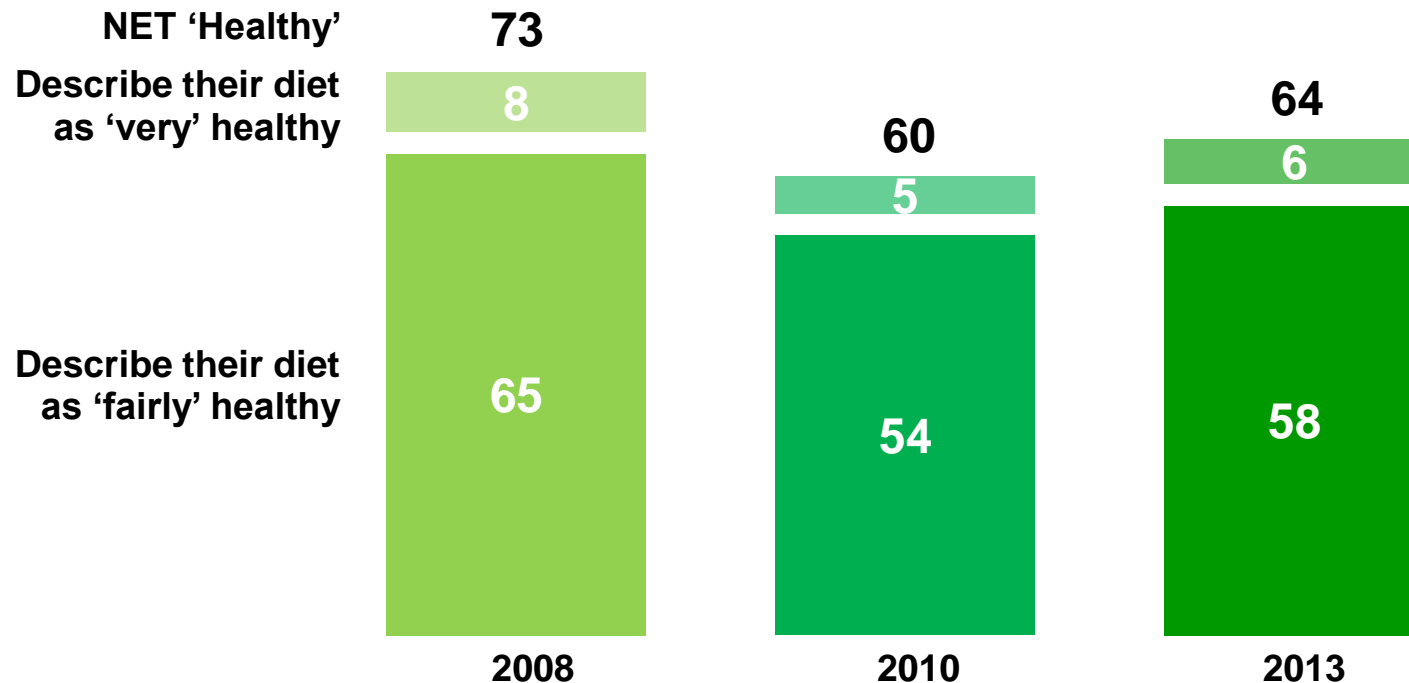
# Health & Wellbeing



Overall perceptions of diet amongst the Germans have declined by almost ten percentage points since 2008.

42

### Diet Perceptions

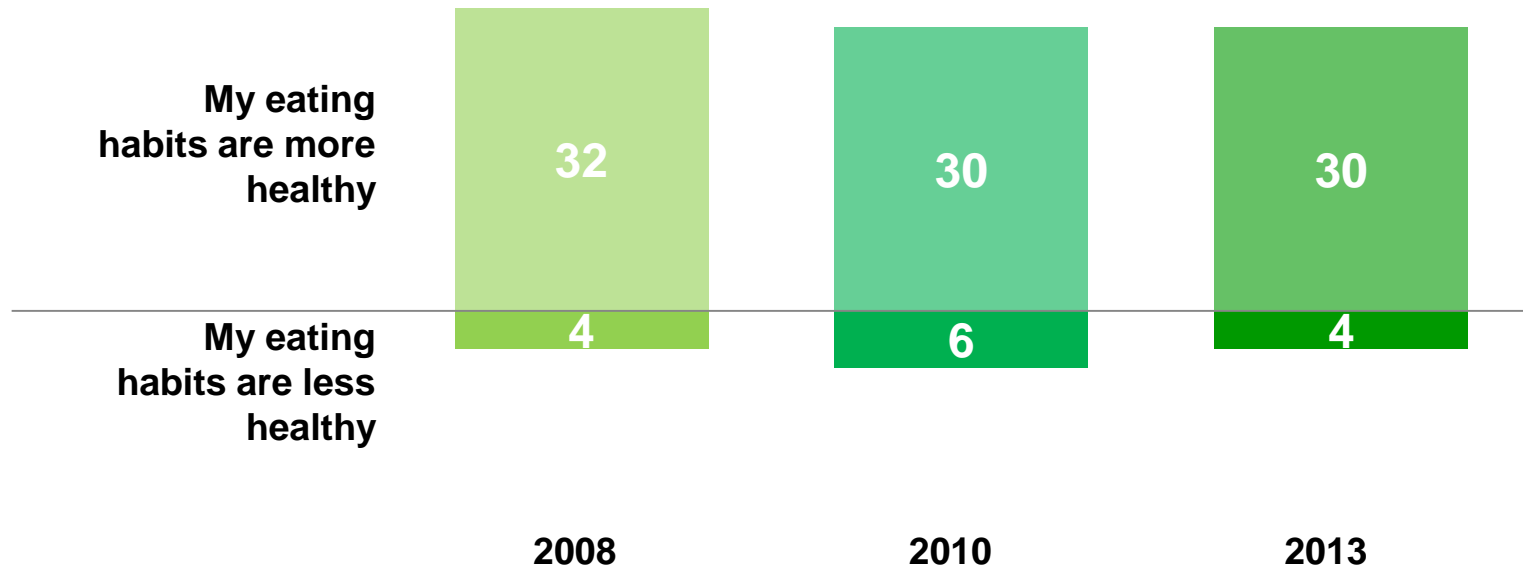


Germany's perception of its own healthiness is the lowest of the PERIscope 2013 study.

Three in ten Germans believe their eating habits to be more healthy in the last 12 months; a relatively unchanged figure over the past five years.

43

### Changes in eating habits in last 12 months

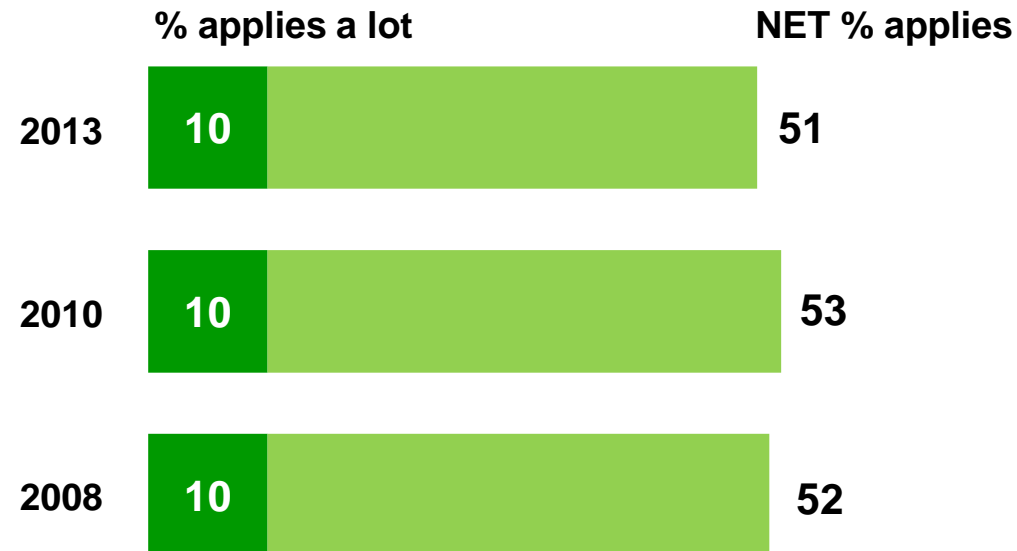


Germany ranks in the top four when it comes to believing its eating habits are healthier than before.

Efforts to eat at least 5 portions of fruit and veg each day have remained stable in Germany since 2008.

44

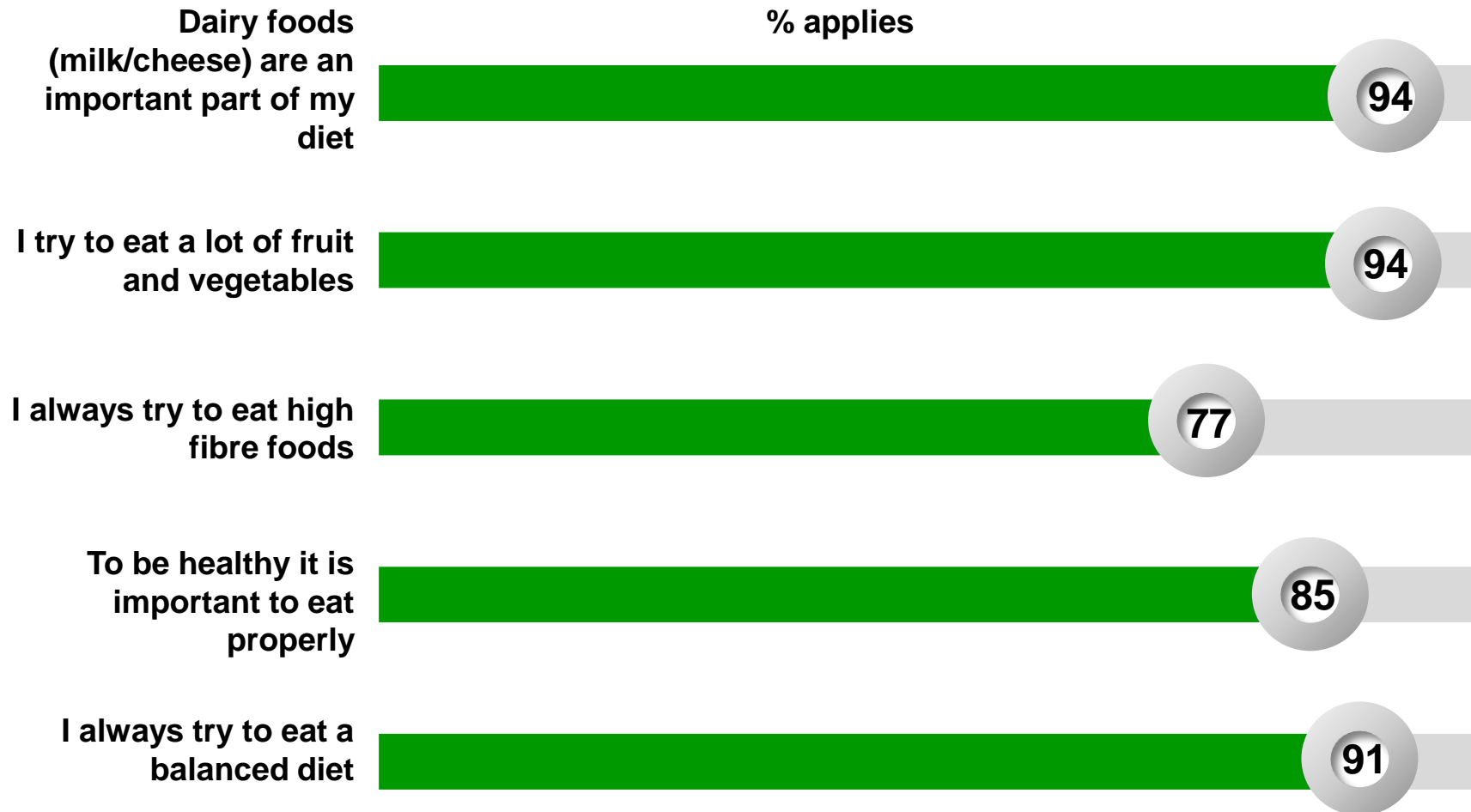
***I eat at least 5 portions of fruit and veg per day***



Germany ranks amongst the lowest countries for efforts to eat the recommended '5 a day'. It displays a similar behaviour to Sweden (49%).

In Germany high-fibre foods are consumed less than dairy and fruit and veg. Having a balanced diet is deemed extremely important in Germany.

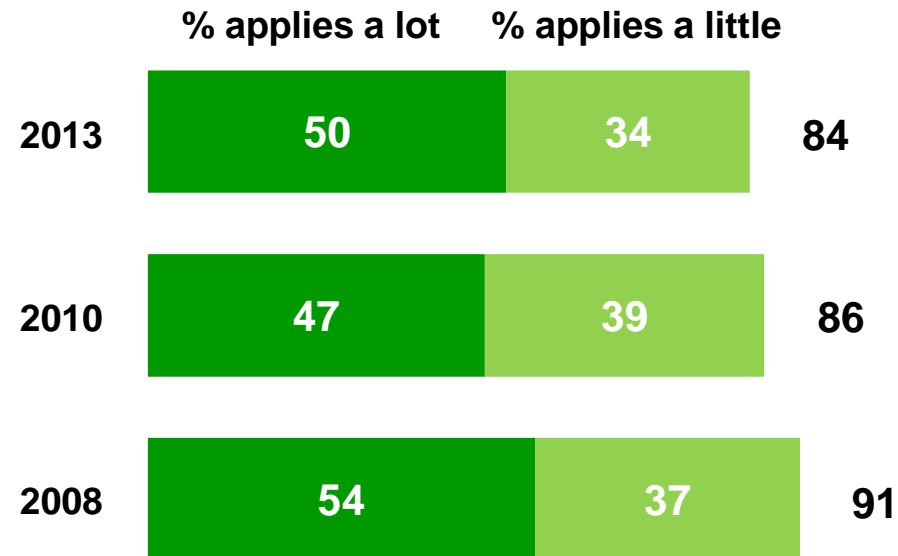
45



Since 2008, efforts to limit fast food consumption in Germany have slipped slightly, though, it still remains a defining behaviour of most Germans.

46

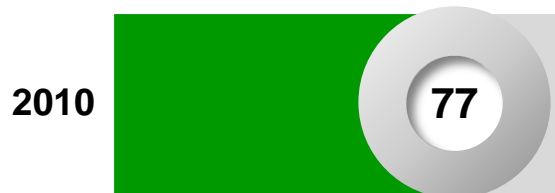
***I try to limit the amount of fast food that I consume***



While all countries are making efforts to reduce fast food consumption, German efforts rank in the bottom two, ahead of GB (78%) only.

Shopping for low fat options has declined since 2010. Thinking about calories and associating low fat with the healthy choice have also reduced considerably.

**% 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'***

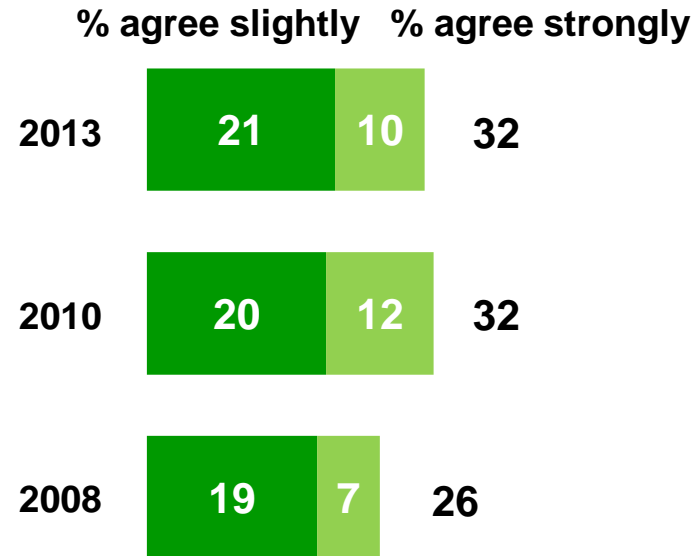


Germany ranks fourth in its tendency to look for low fat products when shopping. It ranks lowest for the thought given to the calories in the food it eats and it is one of the most cynical, alongside Sweden, in its view that low fat equals the healthy choice.

Concerns about ones children becoming obese have risen to almost one third of all adults with dependent children.

48

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



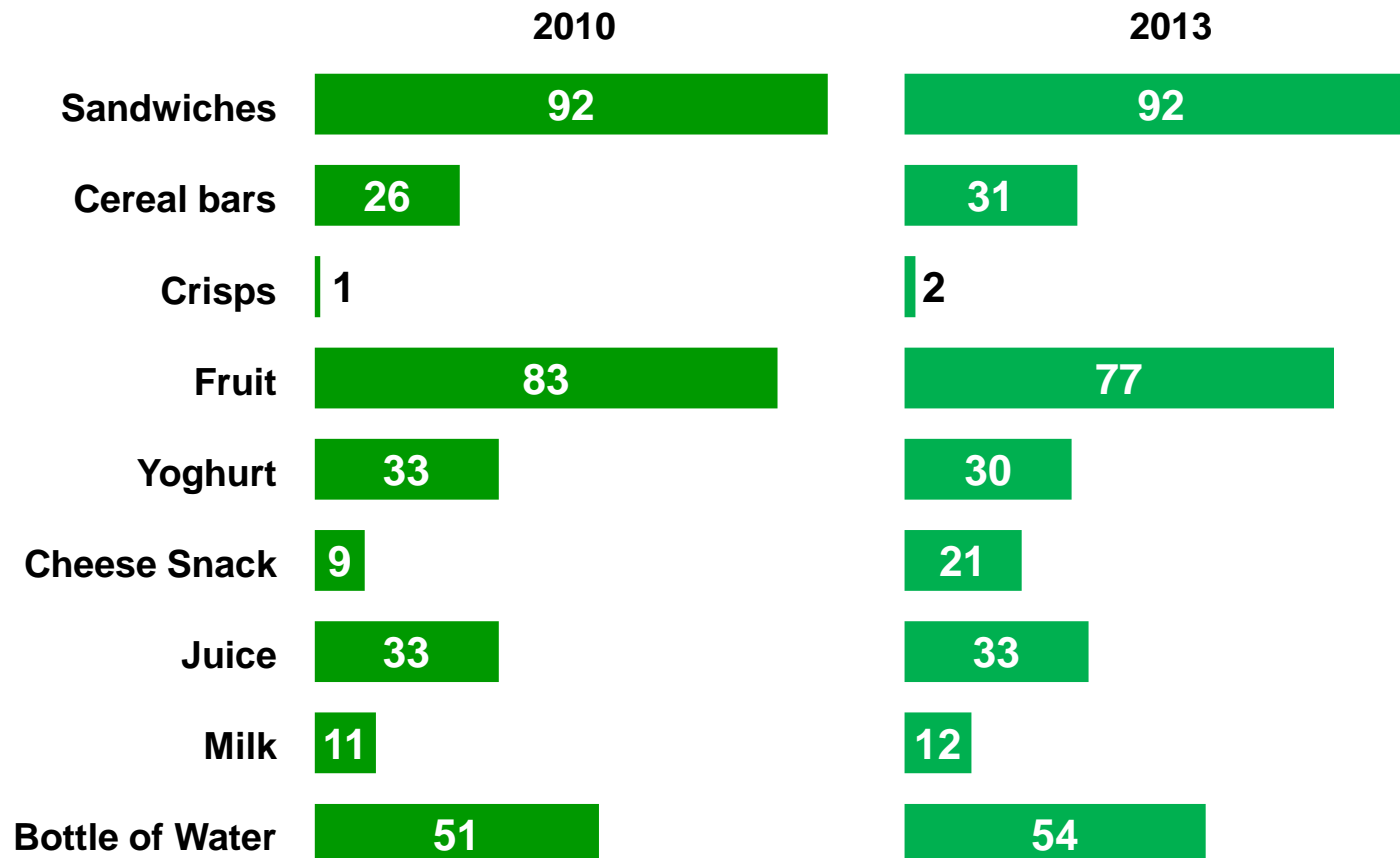
Germany ranks seventh in terms of concern about one's children becoming obese. Its levels of concern are similar to that of ROI & GB (31%) and the Netherlands (28%).



Sandwiches and fruit are popular lunchbox components in Germany. Water is the most popular drink. Cheese snacks have grown considerably in popularity in three years.

49

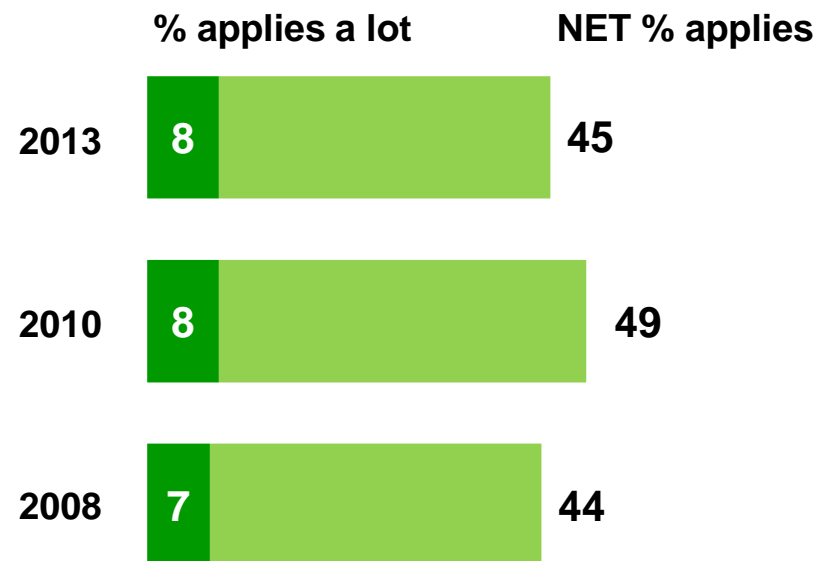
### Content of kids' lunchboxes



The belief that choosing healthy food is limiting and boring has failed to advance beyond 2008 levels.

50

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

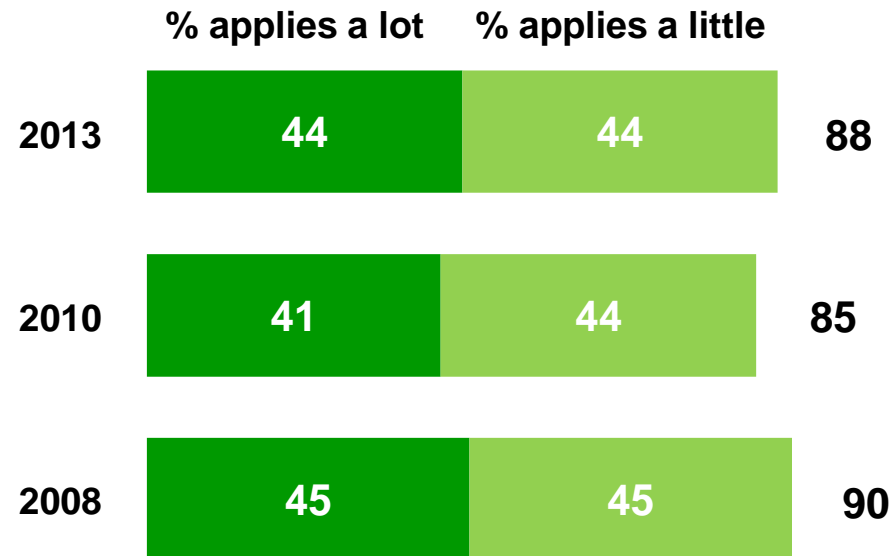


Germany ranks seventh for its assertion that healthy food equals food that is limiting and boring. It is therefore one of the more positive countries when it comes to healthy foods.

The Germans continue to maintain a strong preference for having manufacturers help them to eat healthy.

51

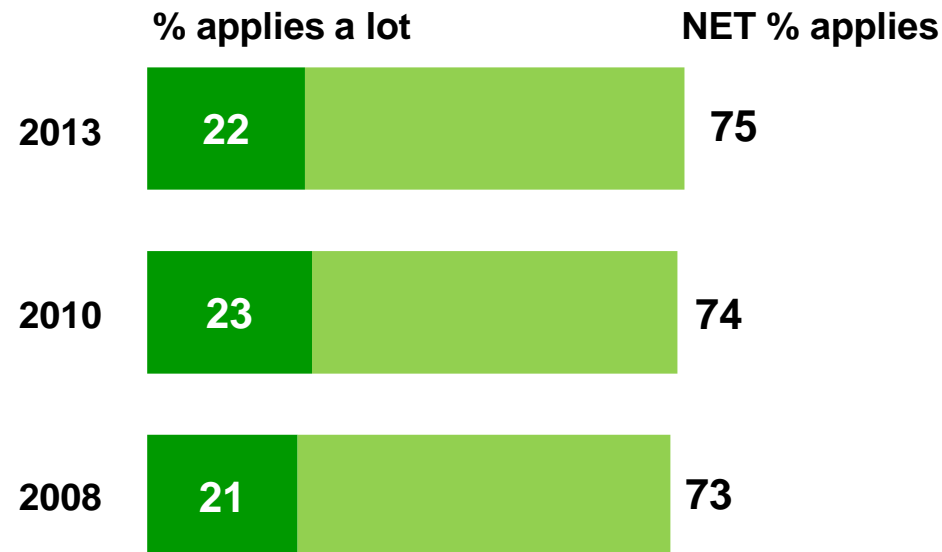
***I would like manufacturers to help me to eat healthy***



Spain (94%), Germany and France (81%) rank as the top three countries that would like manufacturers to help them to eat healthy.

Willingness to pay a premium for healthy foods is now a trait that is applicable to three quarters of German adults.

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

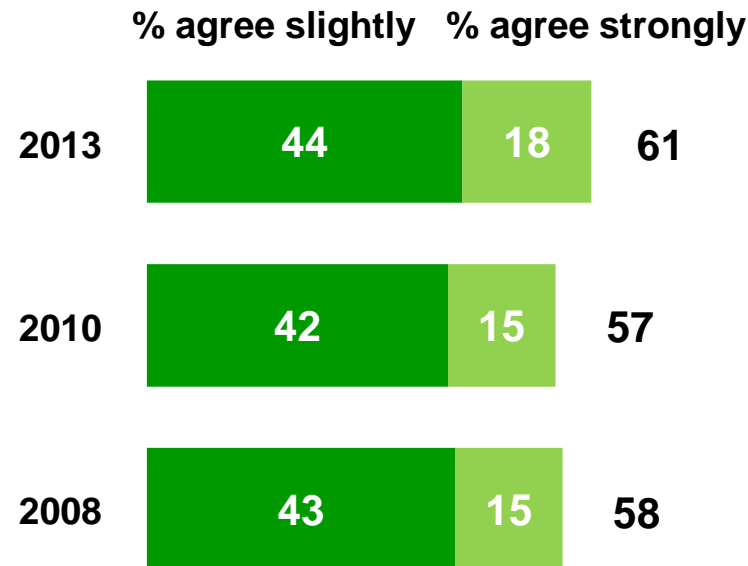


There are six countries in which more than 70% of adults are willing to pay more for healthy food and beverages. Germany ranks third within this cohort.

Eating healthy to take control of one's life is a concept relevant to just over six in ten Germans. It is a concept that has maintained relative stable since 2008.

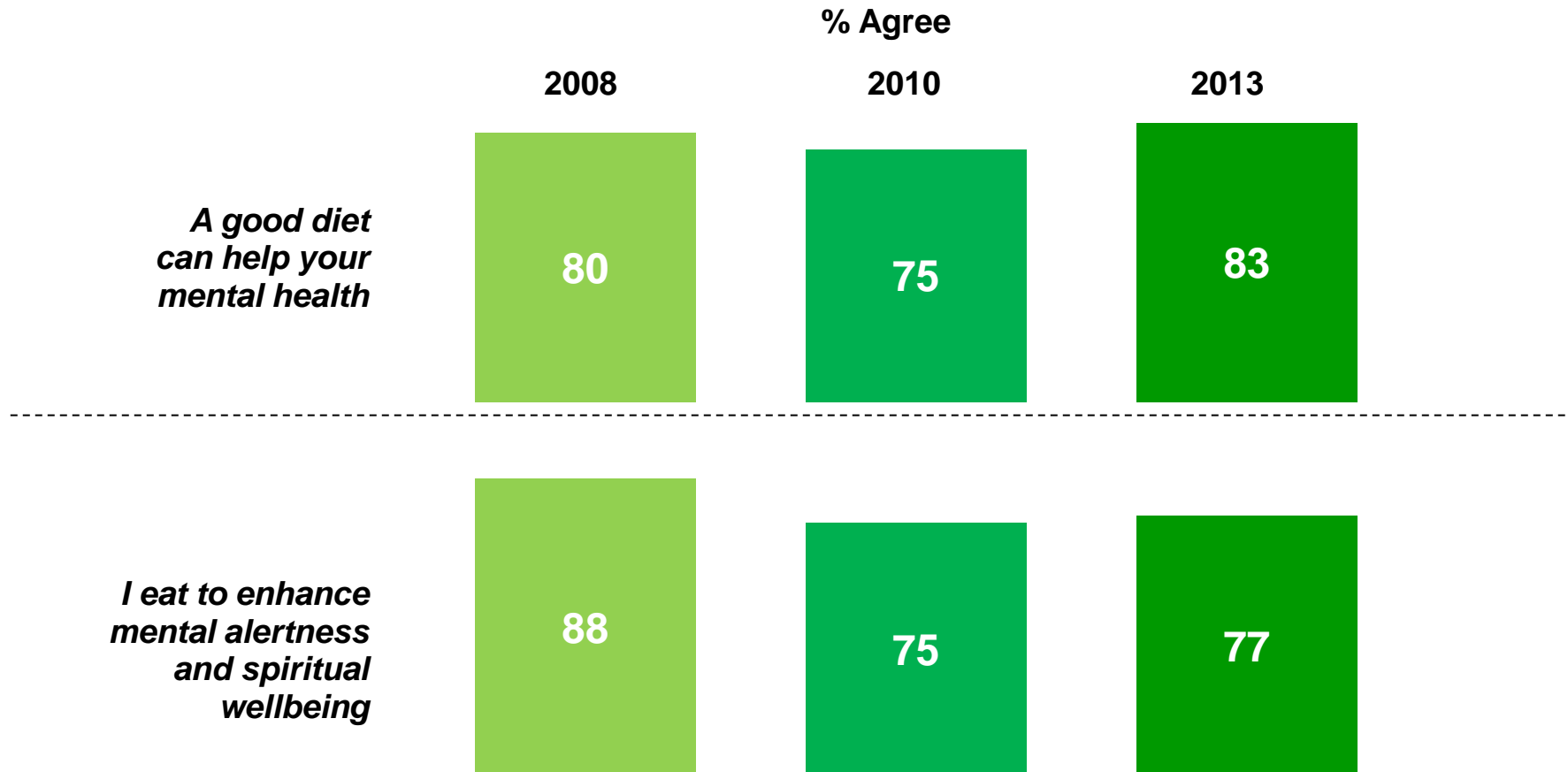
53

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



Germany ranks in the top five in terms of agreeing that it eats healthy to take control.

The relationship between diet and mental health is being viewed with increasing strength in Germany. The link between food and spiritual wellbeing is declining however. <sup>54</sup>



Germany is a strong supporter of the idea that a good diet can help your mental health. It ranks joint second, alongside ROI regarding the idea that what one eats can be important for spiritual wellbeing.

In Germany, today's grocery shopper is no different to that of the grocery shopper in 2008 when it comes to checking the nutritional labelling on food prior to purchase.

55

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



Compared to other countries, Germany's tendency to check the nutritional labelling on food before purchase is average (fifth position).

Compared to 2008, the Germans are finding it more difficult to understand nutritional claims on packaging and food labelling.

56

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

**2013**

**69**

**2010**

**71**

**2008**

**62**

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

**77**

**75**

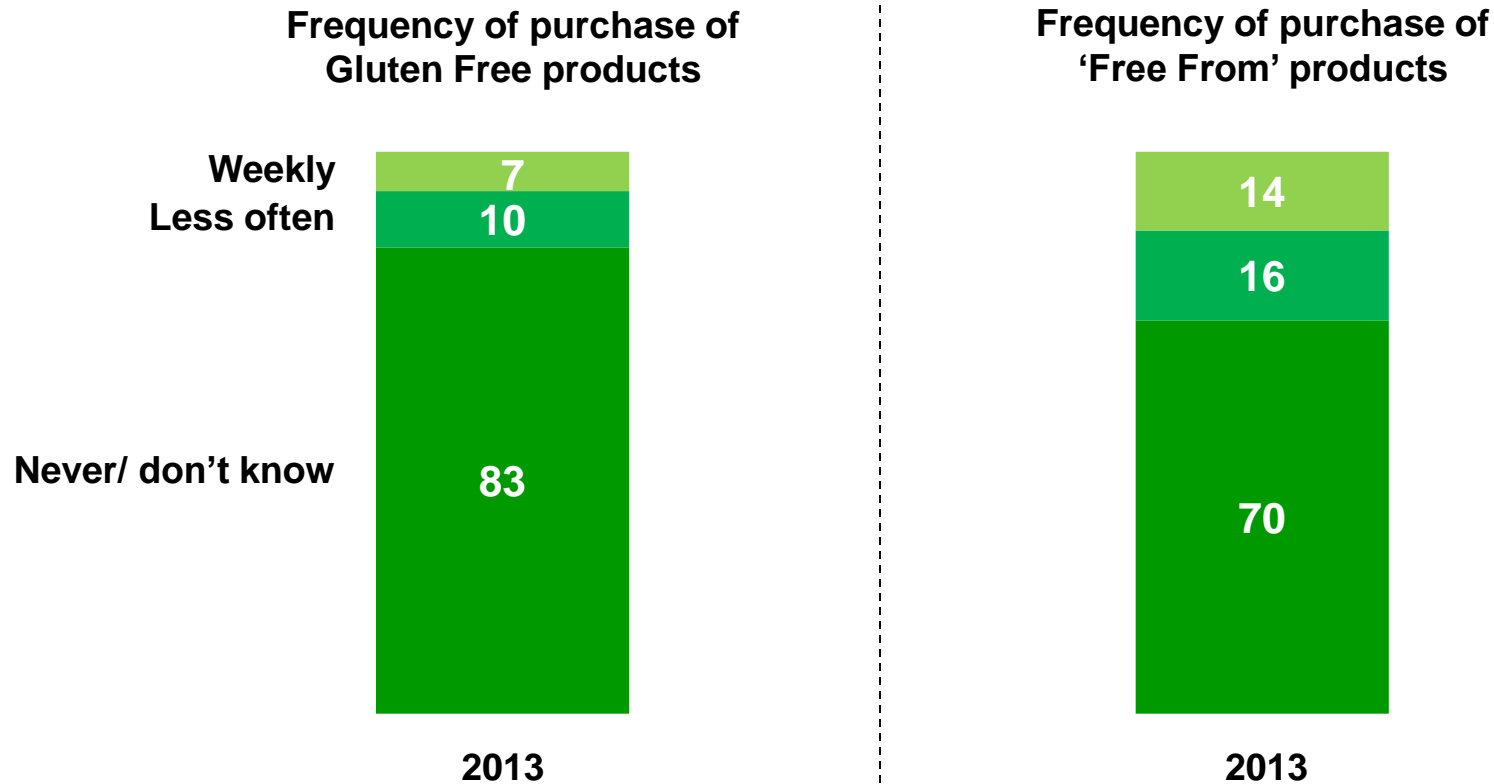
**64**

Germany displays an average understanding of nutritional claims on packing but it displays the second highest level of difficulty in understanding labelling on food.



Gluten free products are far less popular than 'free from' products. Weekly purchases of 'free from' products are double that of gluten free products.

57



Purchases of gluten free products in Germany are higher than many other countries except Spain and the US. It ranks joint second for purchases of 'free from' food, alongside the US.

# TAKEAWAYS



# # 1

## Positive on the outside

- High levels of fun, passion and enjoyment regarding food and cooking.
- But lacks confidence in bringing cooking skills to a more social level.
- Lost devotion to meal time as family time.
- Scratch cooking is popular but displays considerable scope for enhancement.





## #2

# Embedded in convenience

- Strong reliance on ready prepared/convenience foods as mainstream.
- Attempts to reduce consumption of convenience foods lacking conviction.
- Convenience foods have important role despite increasing levels of negativity regarding their characteristics.
- Hesitancy to abandon the product and its benefits.



# #3

## Environmentally engaged

- High awareness levels translate to high purchase levels.
- Strong convictions about sustainability and food miles provides scope for positive reactions to these food types.
- View is that; food must be responsible and consumers must be responsible.



# #4

## Hard to reach shoppers

- High likelihood to check for product information (local/ country of origin) may influence behaviours.
- However, unlikely to be swayed by price, a bargain or better customer service.
- Shop for what they want, when they want, where they want.
- Some openness to online technologies evident.





# #5

## Health in conflict

- Lowest level of perceived healthiness.
- Strong acknowledgement of importance of balanced diet, high willingness to pay more for healthy food and positive about healthy food options.
- High levels of cynicism regarding low fat, low levels of thought given to calorie content and evidence of weaker attempts to limit fast food.



# #6

## Information & confusion

- High levels of difficulty in understanding food labelling.
- Understanding is affecting tendency to check nutritional information on products and potentially, efforts to be more healthy.





# PERIscope2013



## German Consumers & Their Food



Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board