

PERIscope2013



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



Introduction

- PERIscope 2013 explores consumer behaviours & attitudes towards food, shopping and cooking.
- Face-to-face survey conducted amongst 1,000 adults aged 15+ in Republic of Ireland and 16+ in Great Britain.
- Results are also available across eight 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 or email info@bordbia.ie

A Foodie World



ROI still remains less positive than GB when it comes to their cooking activities. However, ROI's positivity about cooking has been steadily rising since 2005.

4

% Good Fun

% A Passion

Attitude towards cooking

2005

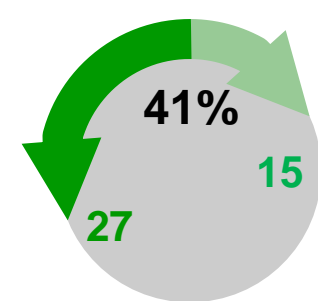
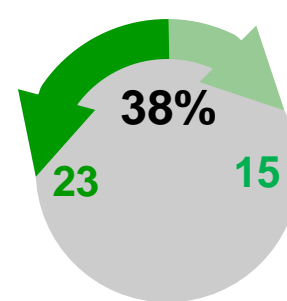
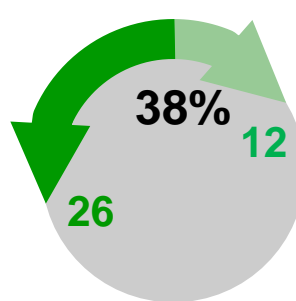
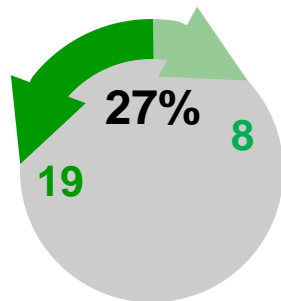
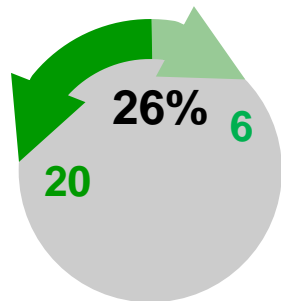
2007

2009

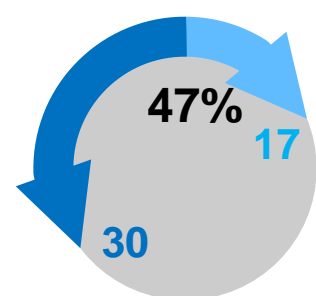
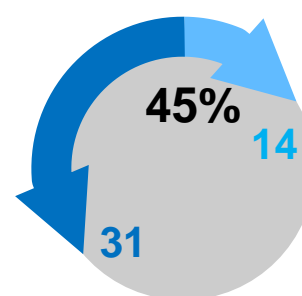
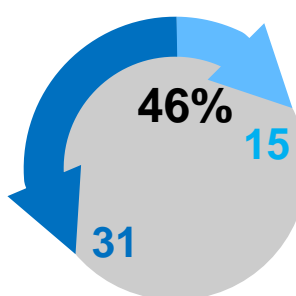
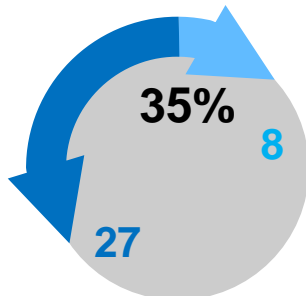
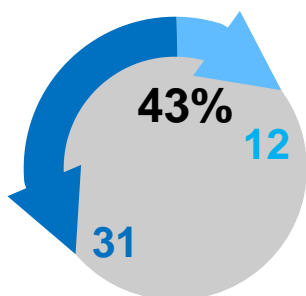
2011

2013

ROI



GB

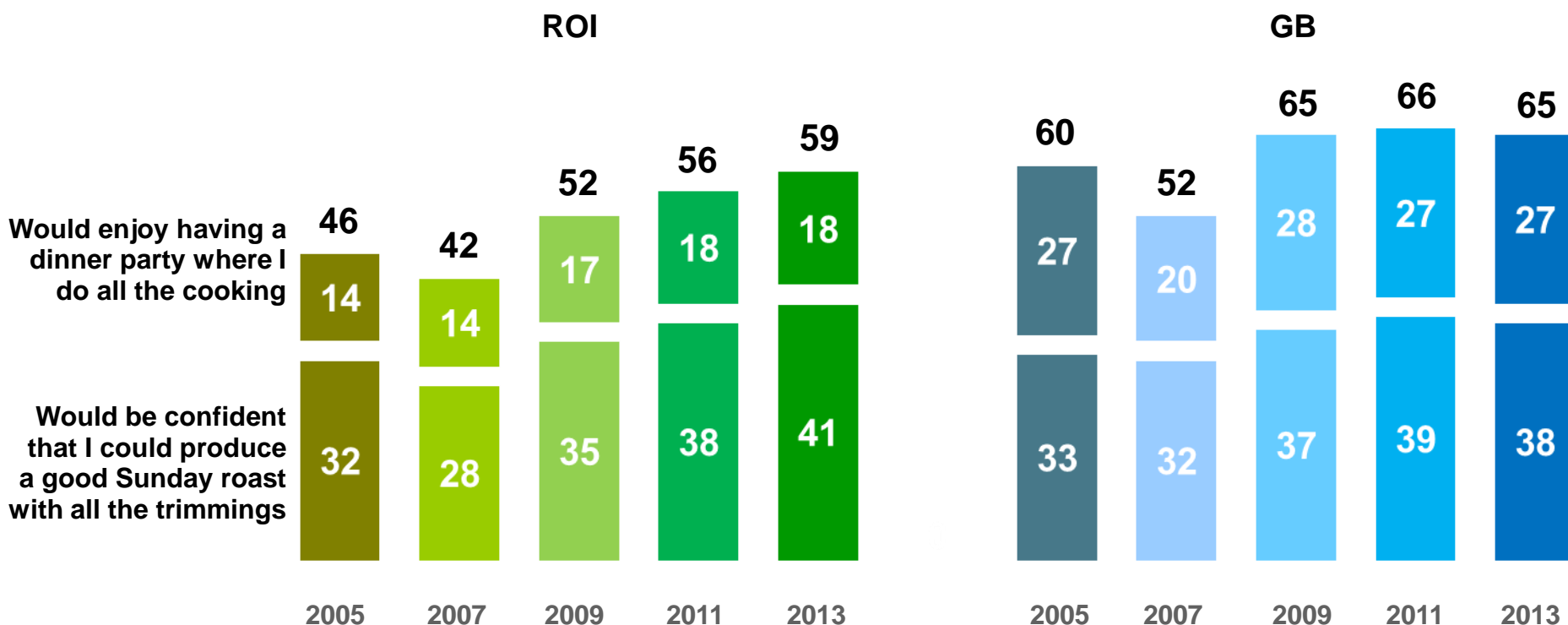


ROI, alongside the Netherlands, claims to have the least fun cooking. It is also one of the least passionate. Overall, ROI and GB's attitude towards cooking is considerably behind that of Germany, at 73% and Sweden at 60%.

Despite a steady increase in ROI's level of cooking confidence, it still remains below that of GB who consider themselves to be much more capable dinner party hosts.

5

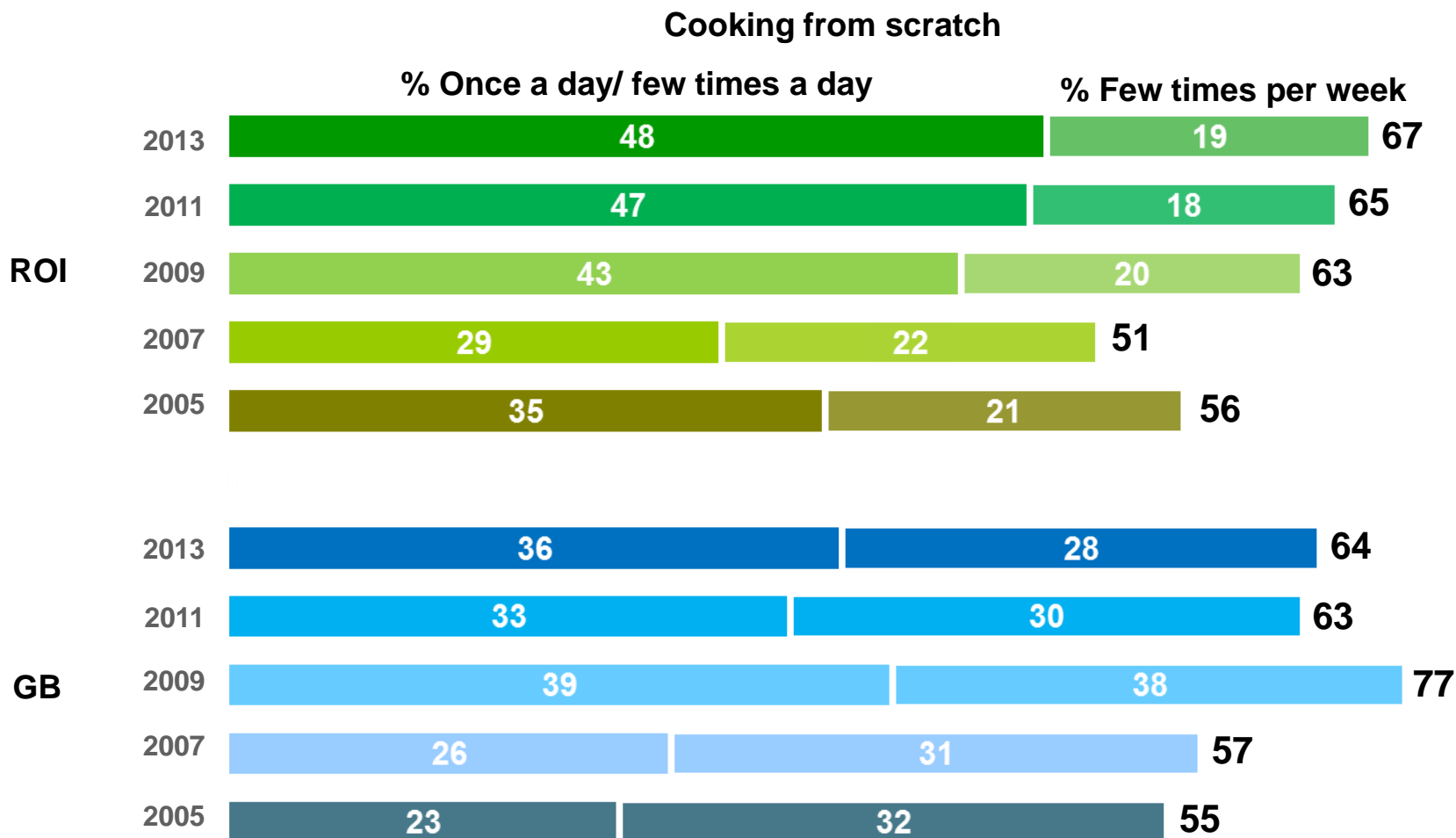
Level of cooking expertise



ROI ranks joint third when it comes to creating meals with all the trimmings but yet it is one of the lowest ranking countries compared to all others on both of the dimensions above. GB ranks fourth highest overall. Sweden has the most competent and confident cooks (80%).

Scratch cooking levels in ROI and GB in 2013 are fairly similar. However, while scratch cooking levels have been increasing in ROI, they have declined somewhat in GB.

6

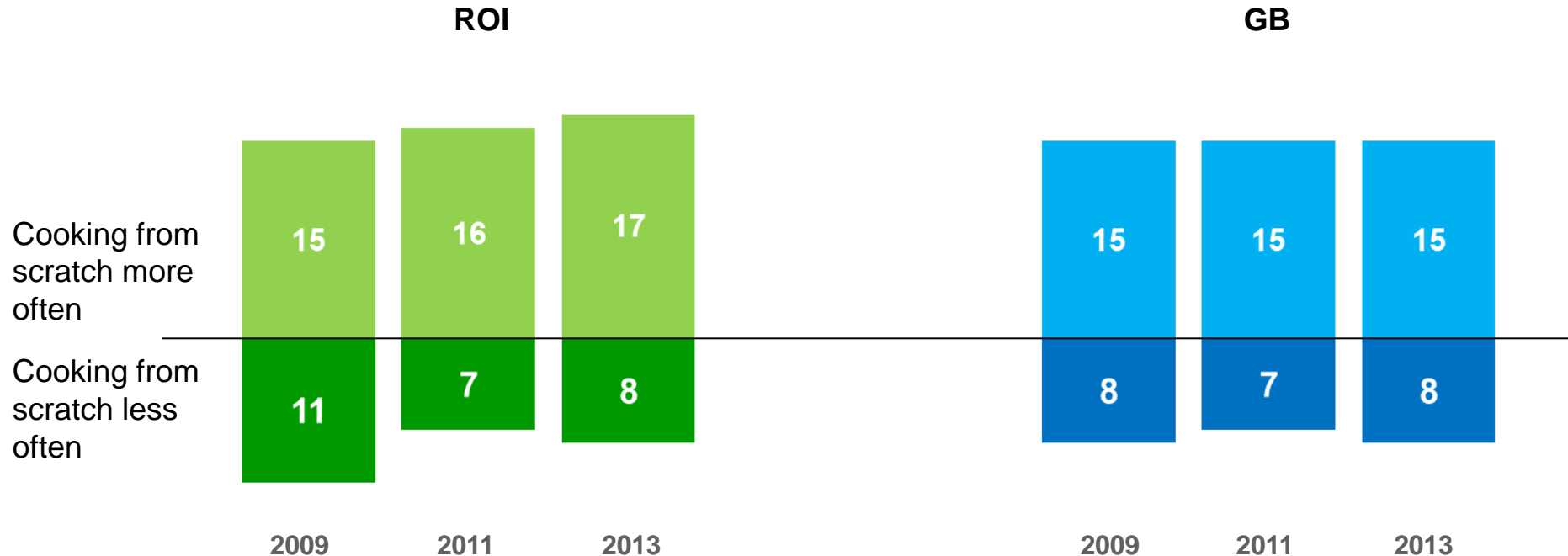


Alongside the US, ROI and GB rank amongst the lowest in terms of daily/ weekly scratch cooking. NZ's daily/weekly scratch cooking activity is the highest at 81%.

Generally, scratch cooking seems to have remained similar year on year. ROI and GB have similar proportions who claim to be cooking from scratch more often.

7

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

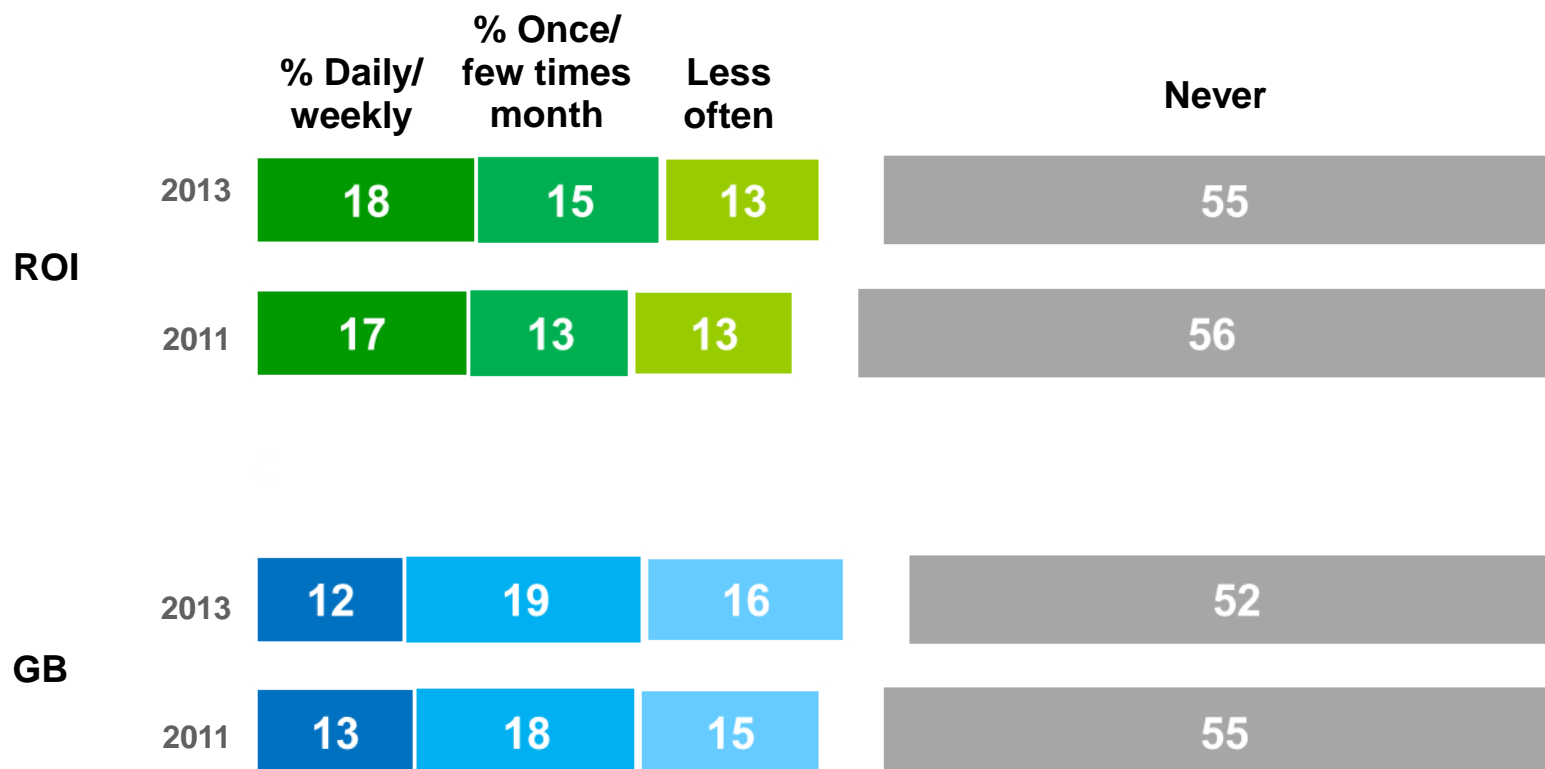


The Spanish have increased their scratch cooking activity more than anyone else. ROI and GB fare similarly to most other countries.

Despite recent TV momentum behind 'baking' activities, less than half of all adults in GB and ROI have ever baked. ROI seem to be more active bakers than GB.

8

Baking from scratch



Usage of ready prepared ingredients is higher among adults in GB than in ROI. The main difference between the two regions is in relation to weekly usage.

9

Usage of ready prepared ingredients

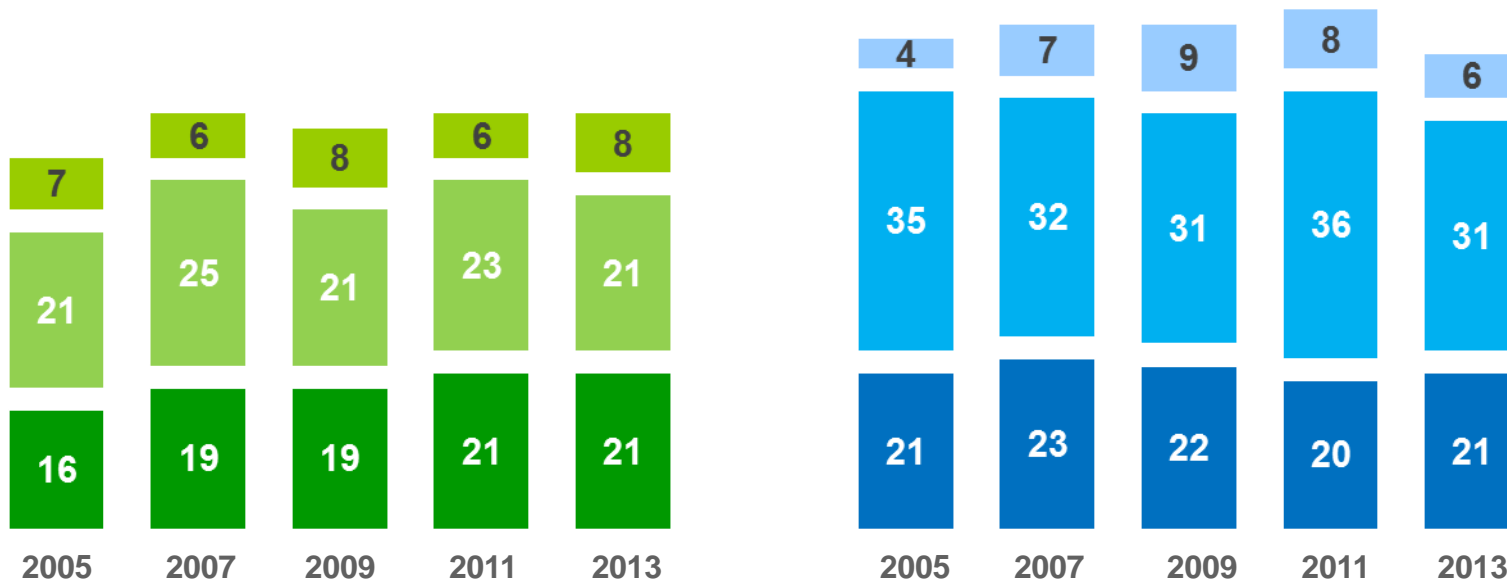
ROI

GB

Once/ few times a day

Few times a week

Once a week

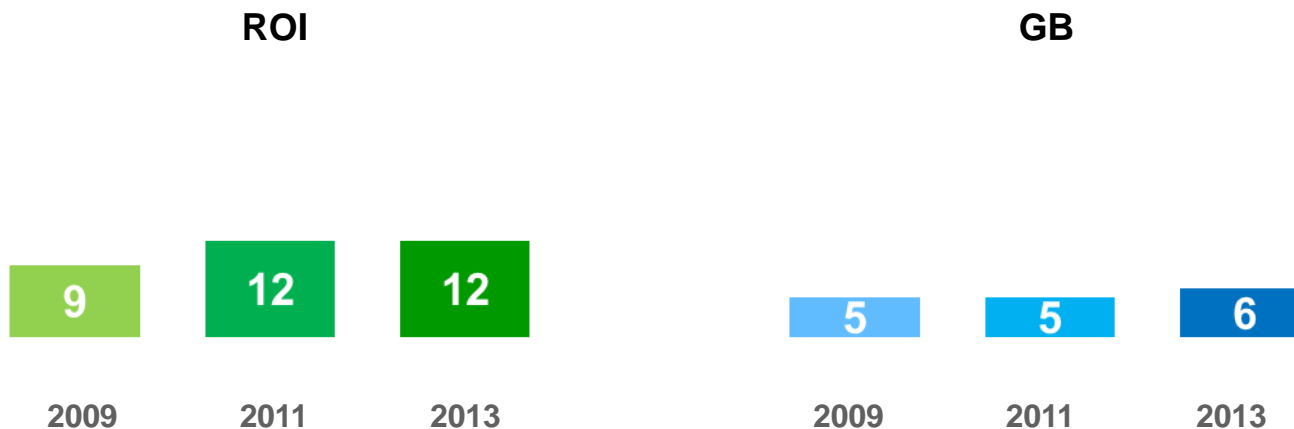


Usage of ready prepared ingredients on a daily/weekly basis is highest in the US, GB & NZ. ROI ranks fifth.

The proportion of people who have attended/taken cooking classes in the past three years in ROI is twice that of GB.

10

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

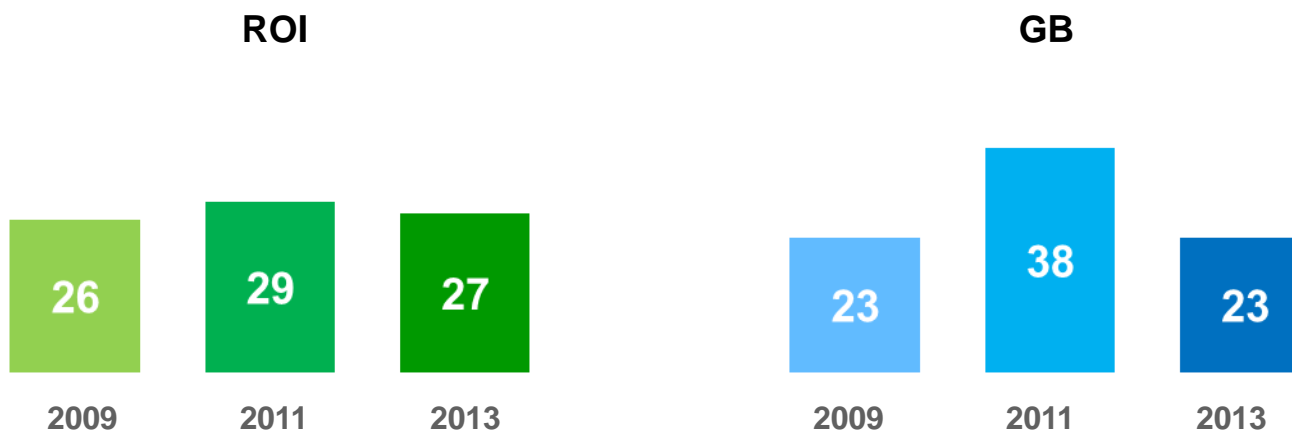


ROI and Spain are the highest attenders of cookery classes. GB has the lowest attendance.

In 2013, there are quite similar proportions of people in both regions who are entertaining at home more often nowadays. GB has seen a sharp decline in figures since 2010.

11

% who are entertaining at home more often nowadays

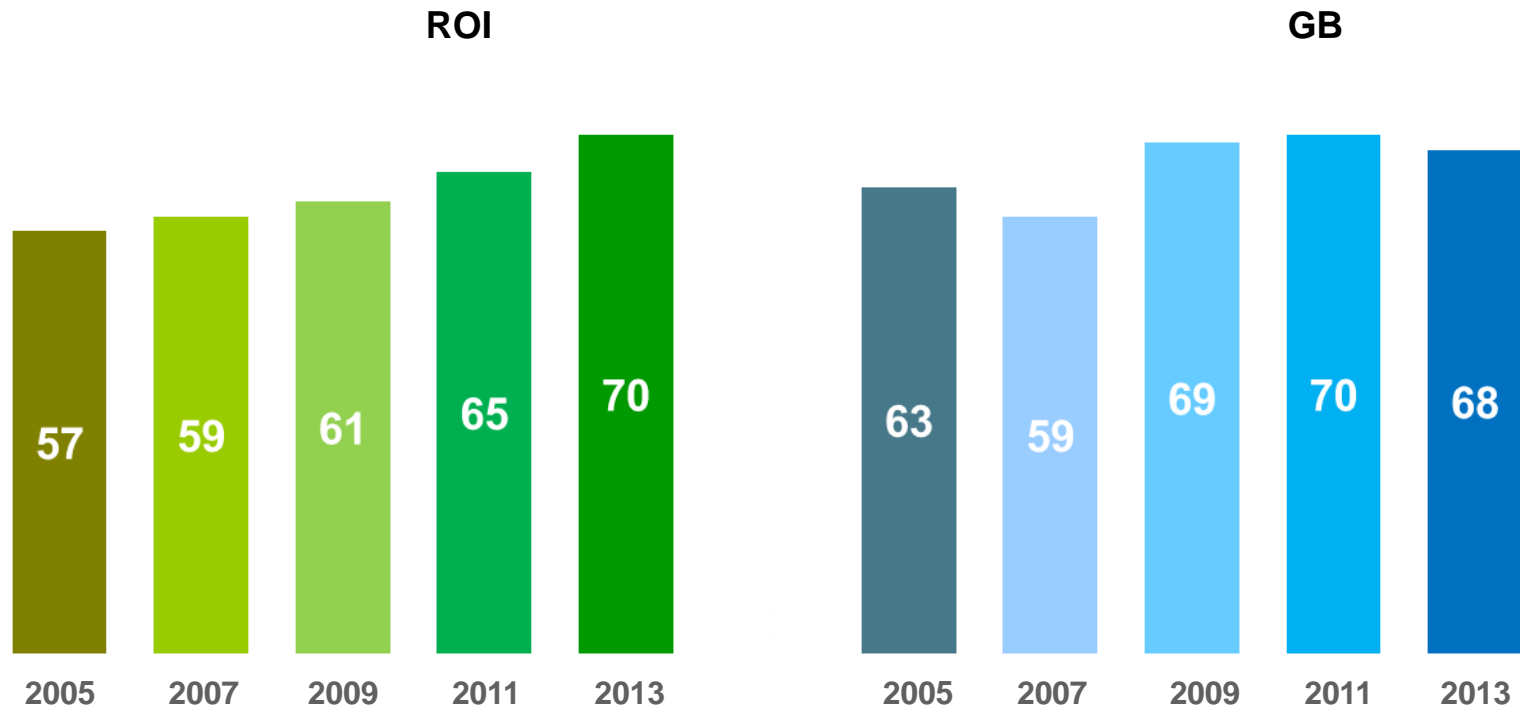


ROI and GB rank in the bottom three for the percentage of people who are entertaining at home more often.

ROI's enjoyment for creating a great meal has steadily increased since 2005. GB's enjoyment has remained steady in the past five years.

12

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

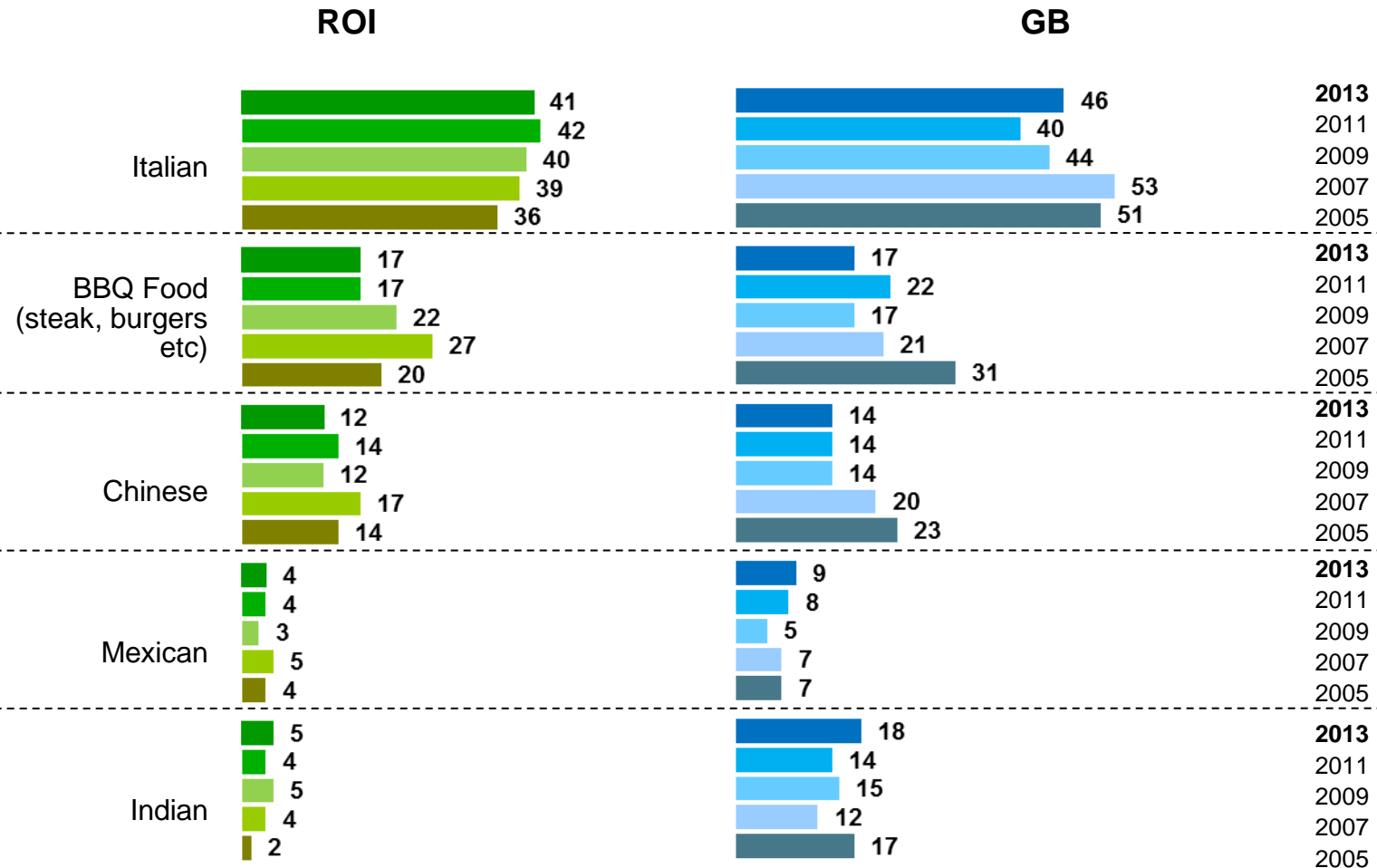


Of all the countries surveyed, GB gets the least enjoyment from creating a great meal, followed closely by ROI. NZ, Germany and Spain get the most enjoyment.

Italian continues to be the most popular cuisine to be cooked in ROI and GB households. Indian is substantially more popular in GB.

13

% Top five cuisines prepared in the home weekly or more frequently



Ownership of food processors in ROI & GB have shown no signs of enhancement in recent times. Similarly, wok ownership has remained steady.

14

Food Processor

ROI

GB

Wok

ROI

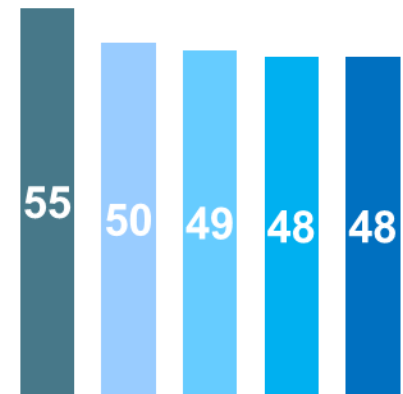
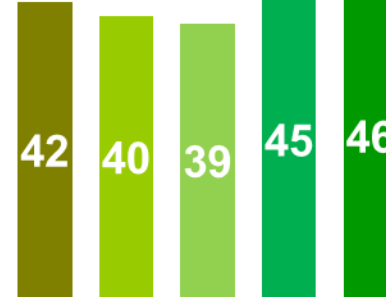
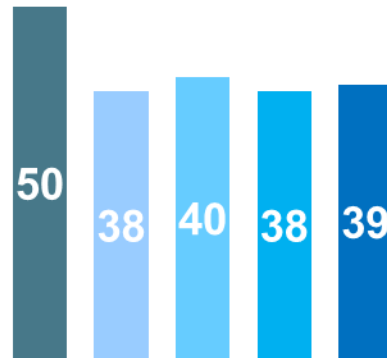
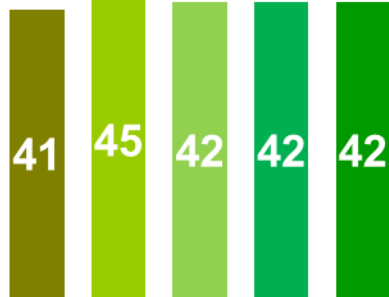
GB

2005 2007 2009 2011 2013

2005 2007 2009 2011 2013

2005 2007 2009 2011 2013

2005 2007 2009 2011 2013

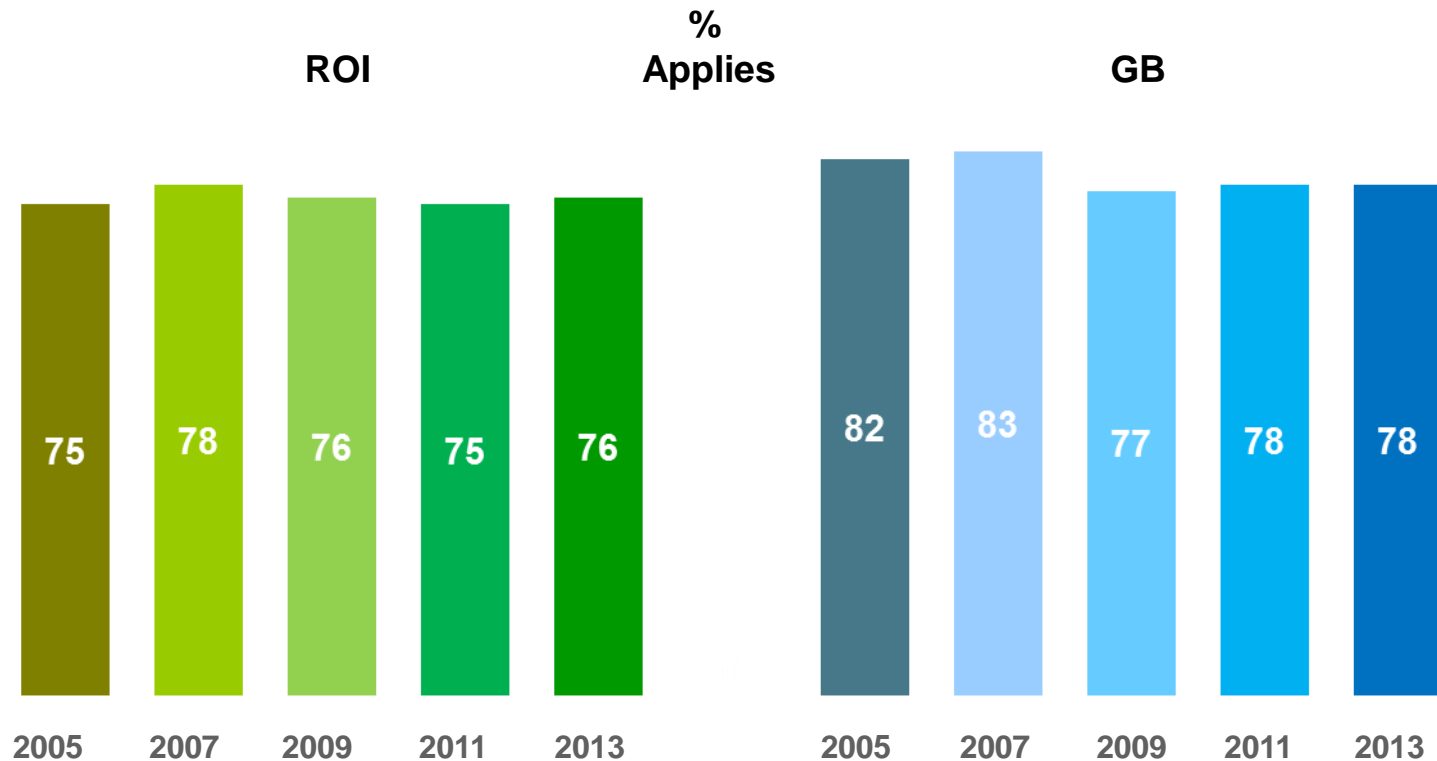


Compared to other countries like Sweden, NZ and France, ownership of food processors is relatively low. ROI and GB demonstrate average ownership levels when it comes to woks, behind the Netherlands, Belgium and NZ.

Both ROI and GB continue to look for foods that do not demand too much time to prepare.

15

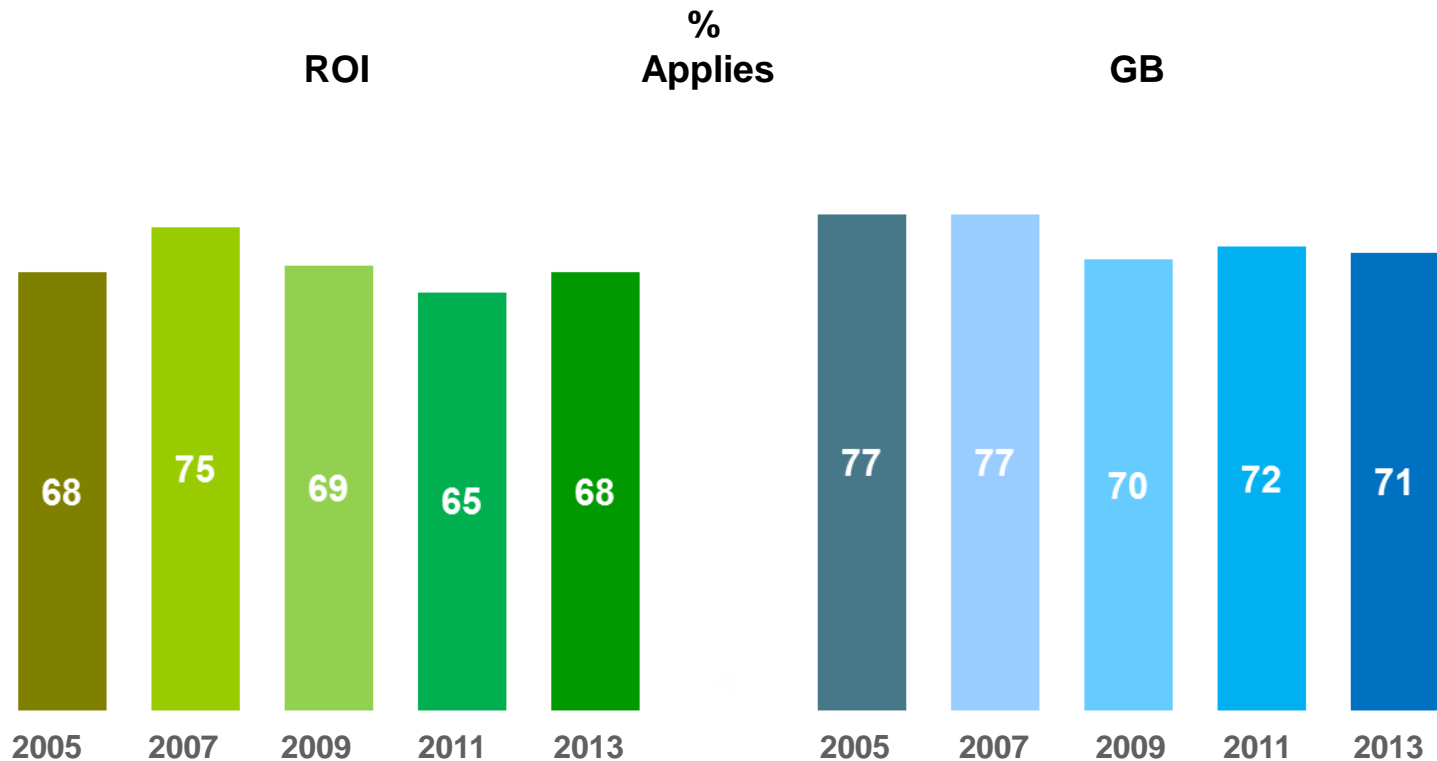
I tend to pick foods that are easy to prepare



All countries across the PERIscope 2013 study are interested in food that is easy to prepare. ROI and GB fare similarly to most other countries. The US and Spain place the most emphasis on food that is easy to prepare.

Both ROI and GB are more willing to wait for food to cook than to spend time preparing it. Since 2007, both countries have decreased their demand for quick to cook foods. 16

I tend to pick foods that are quick to cook

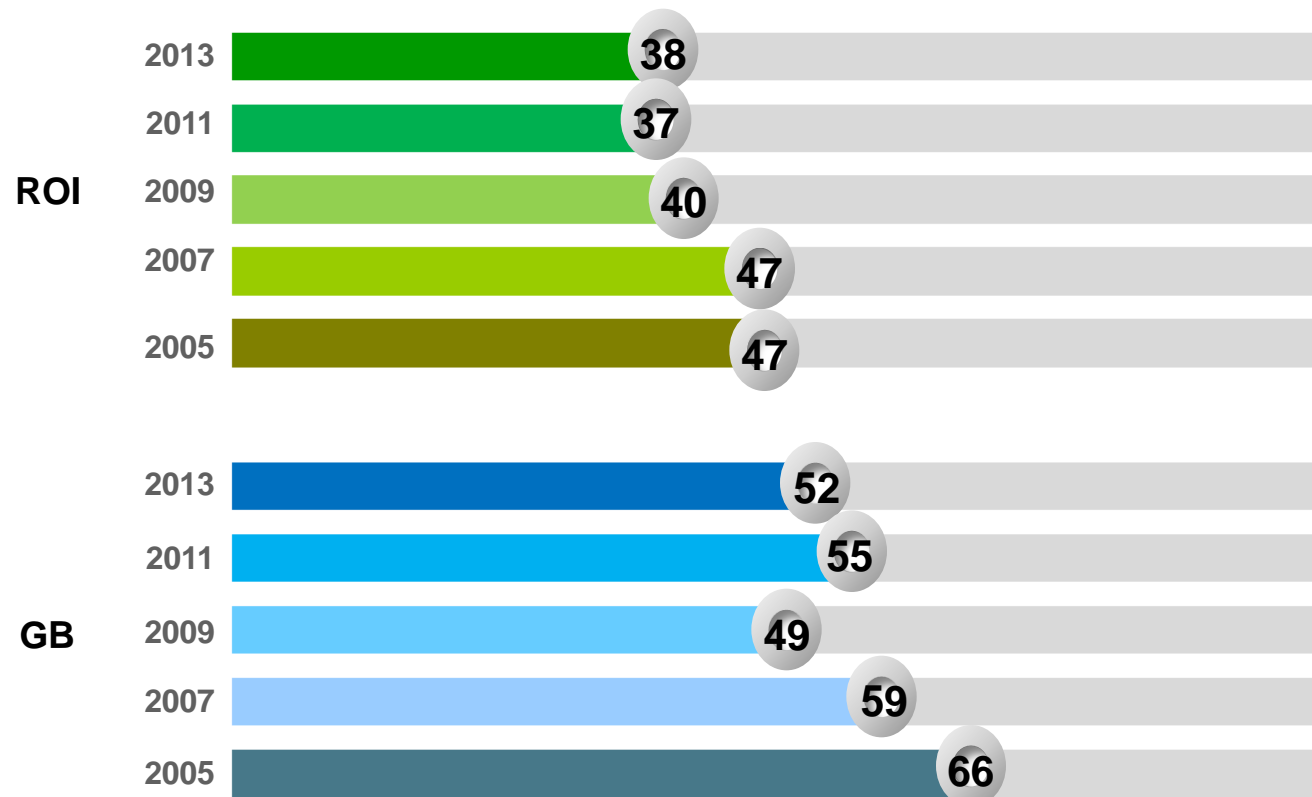


All countries across the PERIscope 2013 study are interested in food that does not take long to cook. ROI and GB fare similarly to most other countries. The US and Spain have the highest demand for quick to cook food.

In the past five years the popularity of ready to eat foods has declined in both regions. Usage of these foods remains much higher in GB than in ROI.

17

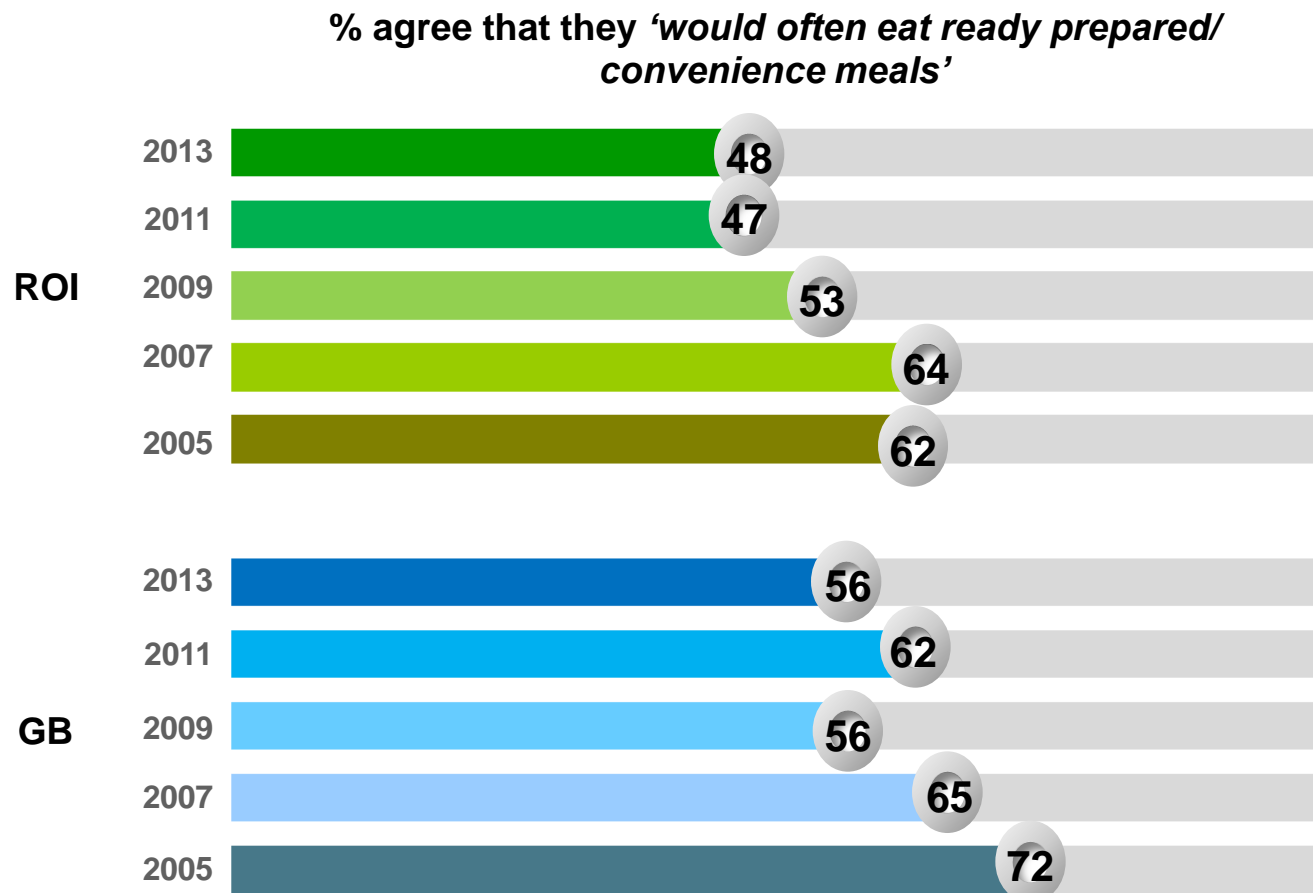
% agree 'we use a lot of ready to eat foods in our household'



ROI's usage of ready to eat foods in the household is one of the lowest of the PERIscope 2013 study. GB on the other hand ranks fourth highest behind the US, Spain and Germany.

While consumption has declined since the high levels of 2005, more than half the adult population in GB eat ready meals 'often'. ROI consumption is much lower.

18

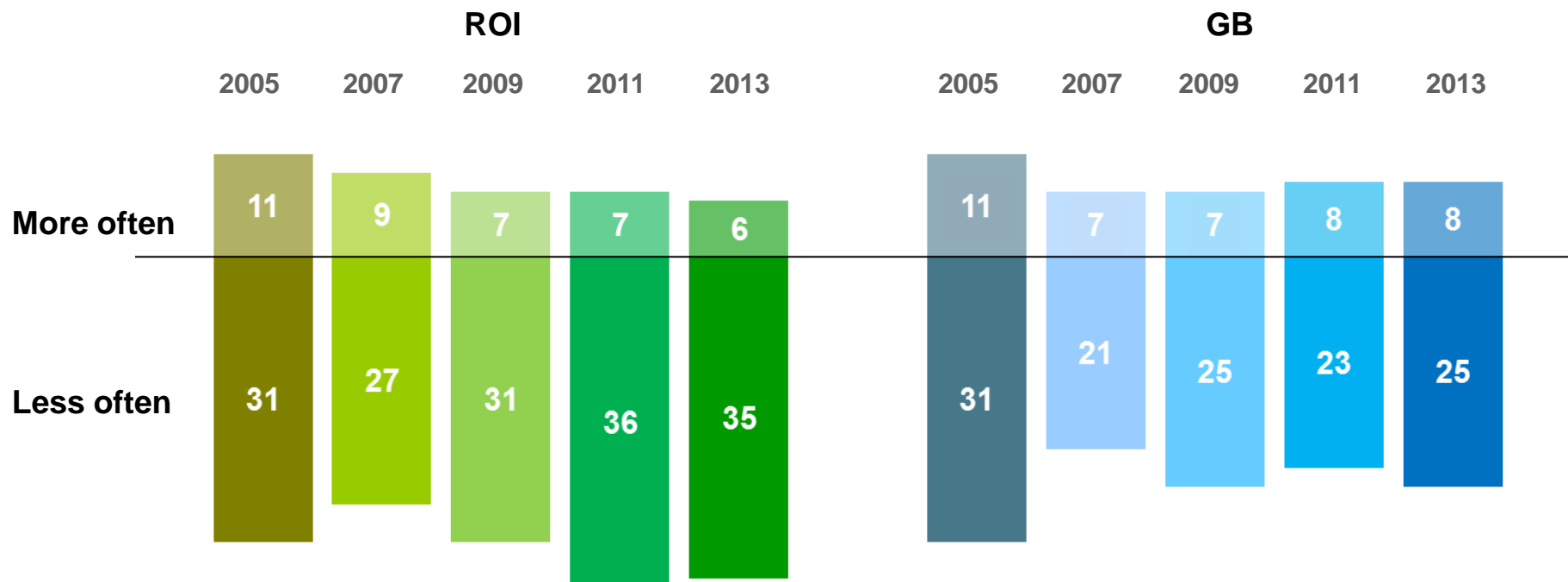


GB ranks third highest for 'often eating ready prepared/ convenience meals', behind the US and Spain. ROI ranks sixth out of ten.

More people in ROI than GB are claiming to eat ready meals/ convenience meals less often than 12 months ago.

19

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

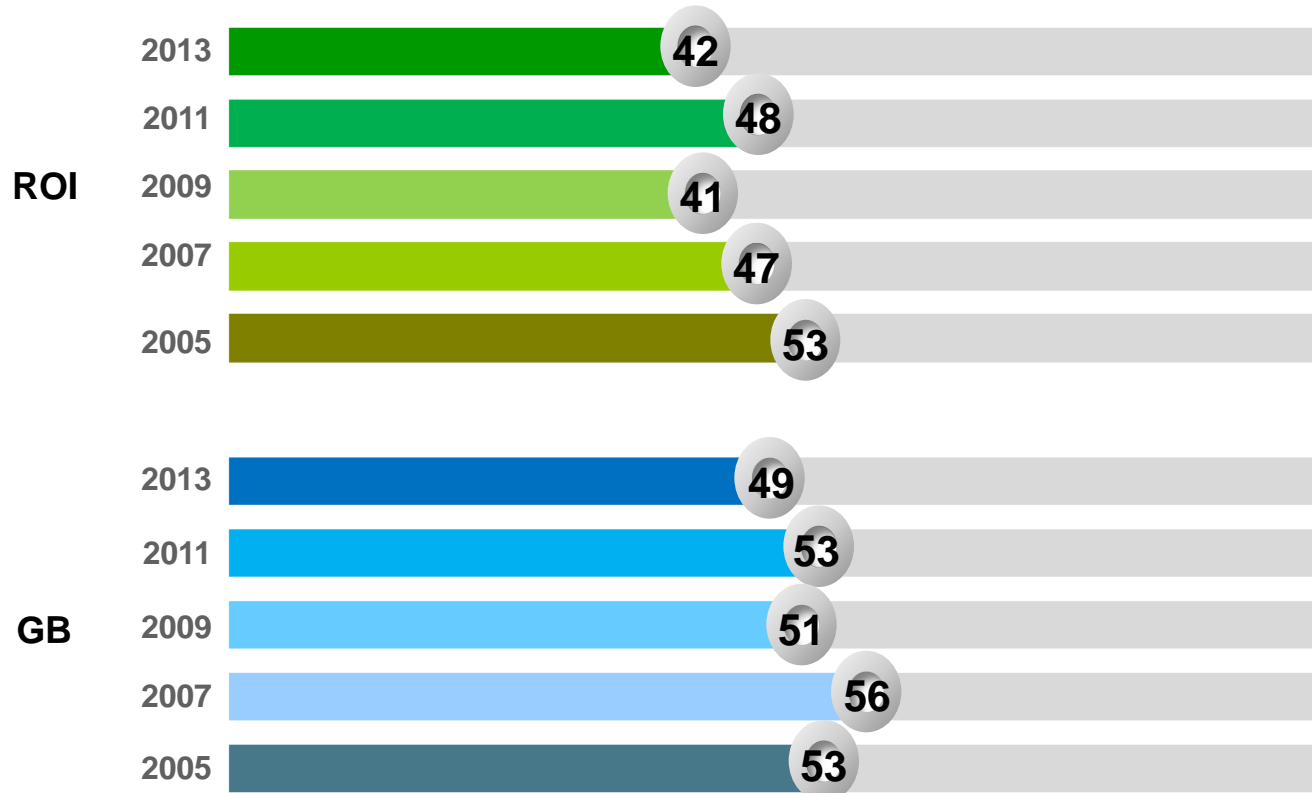


France and ROI have the highest proportion of adults claiming to eat convenience meals *less often*. The US and GB have the lowest.

Viewing convenience meals as a good substitute for home cooking is resonating less and less in both regions. Since 2005, the decline has been greater in ROI than in GB.

20

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



ROI, alongside the Netherlands demonstrate the least amount of agreement with this statement. France, Spain and Germany have the highest levels of agreement.

Perceptions about convenience foods are becoming increasingly negative across both regions, though GB are slightly more positive than ROI overall.

21

% agree in ROI that convenience foods...

... taste great

50% → **42%**
2005 2013

... are good value for money

37% → **30%**
2005 2013

... have poor quality ingredients

41% → **44%**
2005 2013

% agree in GB that convenience foods...

...taste great

36% → **37%**
2005 2013

... good value for money

46% → **42%**
2005 2013

... have poor quality ingredients

39% → **37%**
2005 2013

Attitudes towards convenience meals across all countries are becoming increasingly negative. The US tends to be the most positive overall.

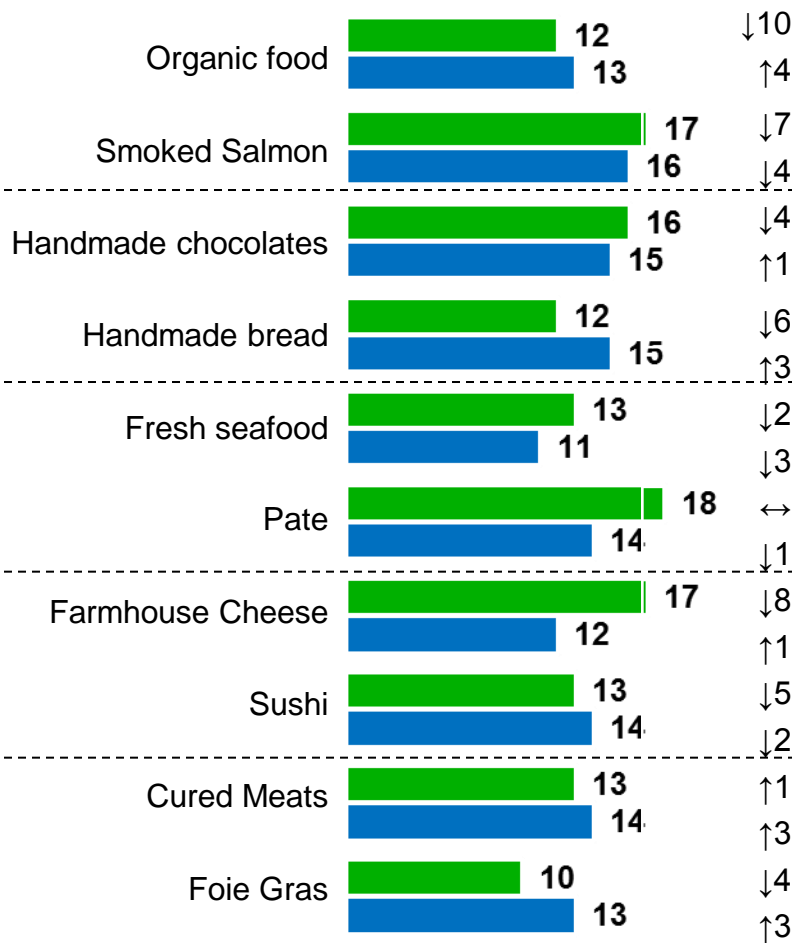
Smoked salmon, handmade chocolates and pate are considered the foods most likely to be considered 'speciality' by adults in ROI & GB.

22

%
Top 10 speciality foods mentioned by ROI & GB

Change since 2011

Main findings



Organic has lost its cache in ROI

Smoked salmon less speciality than before

Handmade chocolates losing lustre in ROI

Handmade breads are more commonplace in ROI

Fresh seafood less speciality than before

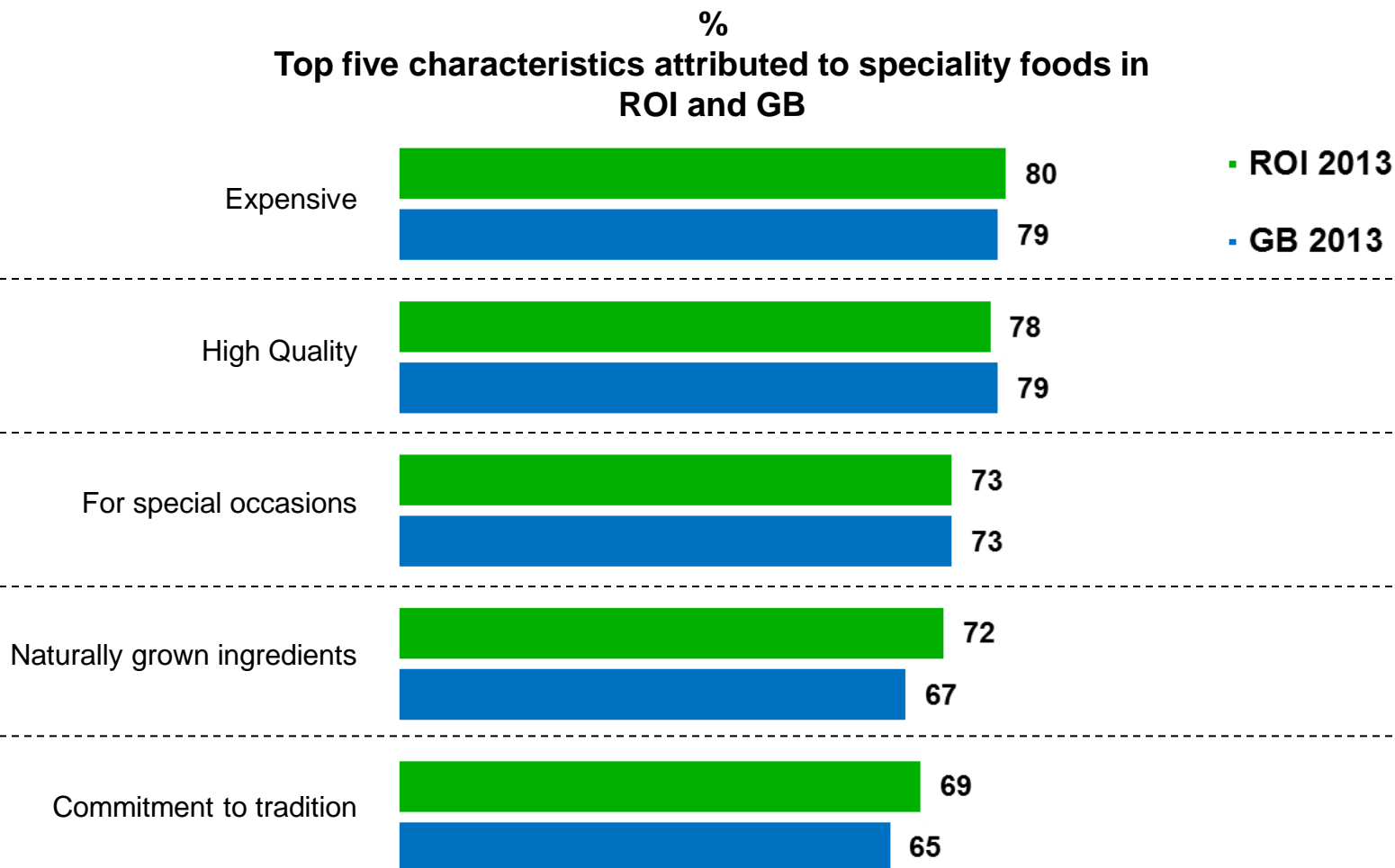
Farmhouse cheese has lost some flare in ROI

Cured meats enhancing speciality?

■ ROI 2013
■ GB 2013

The main characteristics attributed to speciality foods are price tag, quality and use at distinctive occasions.

23



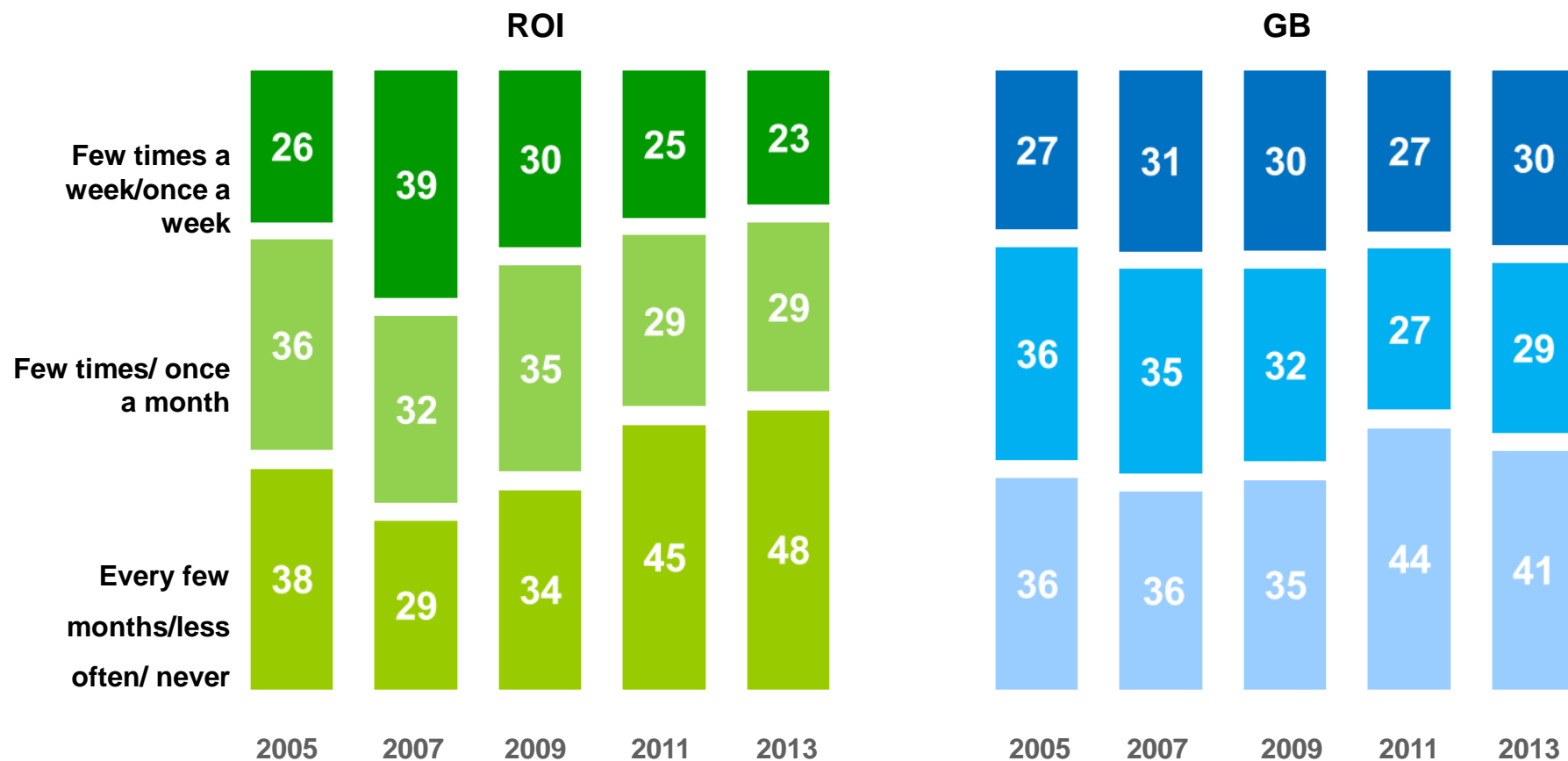
Food Beyond the Home



GB continue to eat out of home more frequently than ROI. While ROI has been reducing its weekly eating out of home activities since 2007, GB has remained consistent.

25

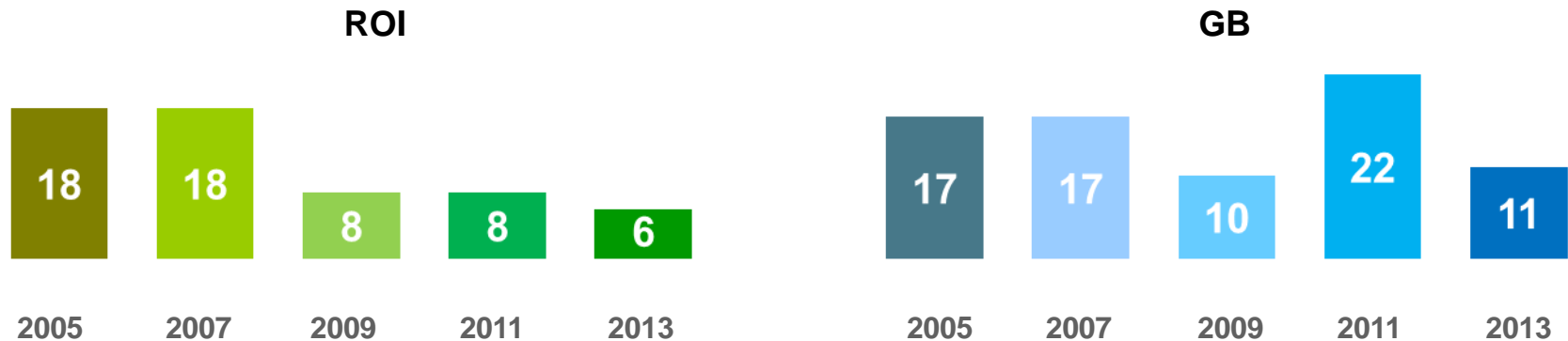
Frequency of eating out of home



The proportion who are eating out more often during the week has declined in both markets. Eating out still remains more popular in GB.

26

% who are eating out more often during the week



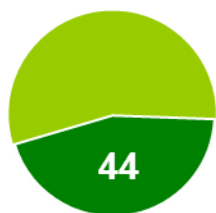
Eating out is much more popular than getting takeaways or deliveries in both regions. There are substantial differences between ROI and GB regarding levels of eating out.

27

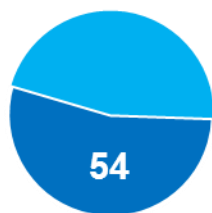
% 2013

Meals eaten out in the last week

**Meals/ snacks
in pub/ restaurant/ cafe**



ROI

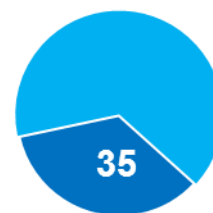


GB

**Takeaway
meals**



ROI

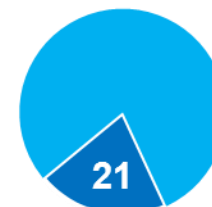


GB

**Deliveries (meals/
snacks) to the
home**



ROI



GB

In ROI and GB, the same proportion of people usually eat their lunch in the workplace.
In GB, these numbers have seen a drop since 2011.

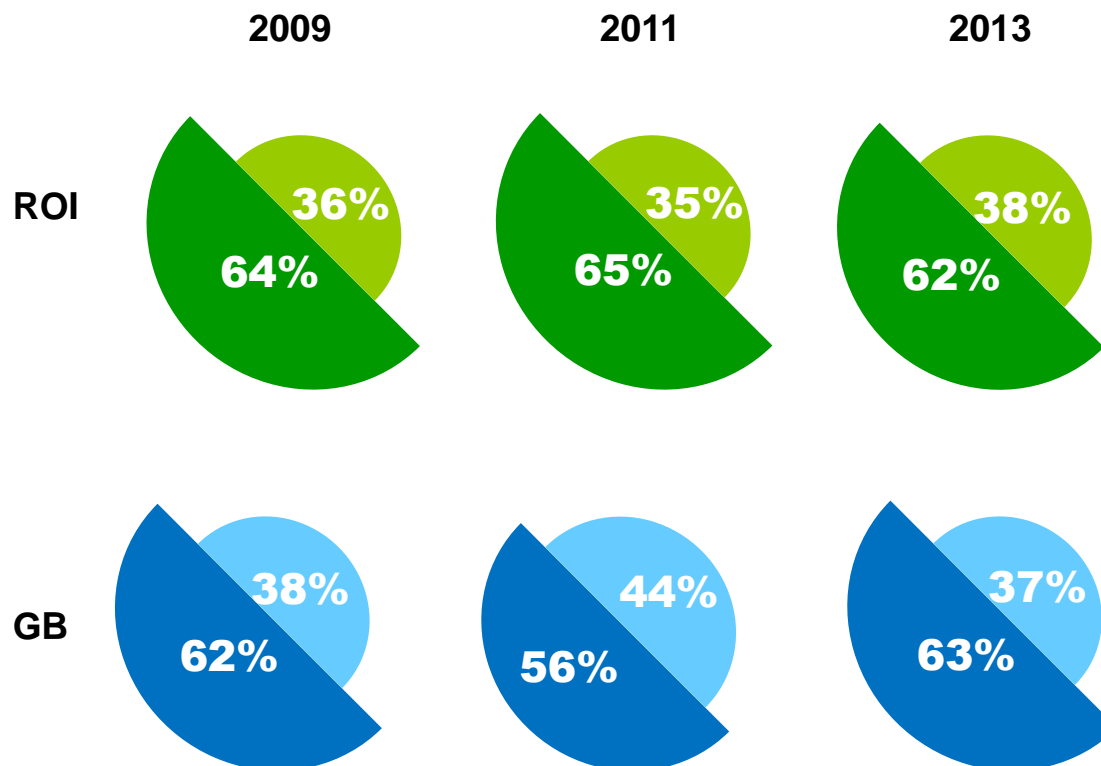
28



% usually eat lunch at work

% usually eat lunch at home

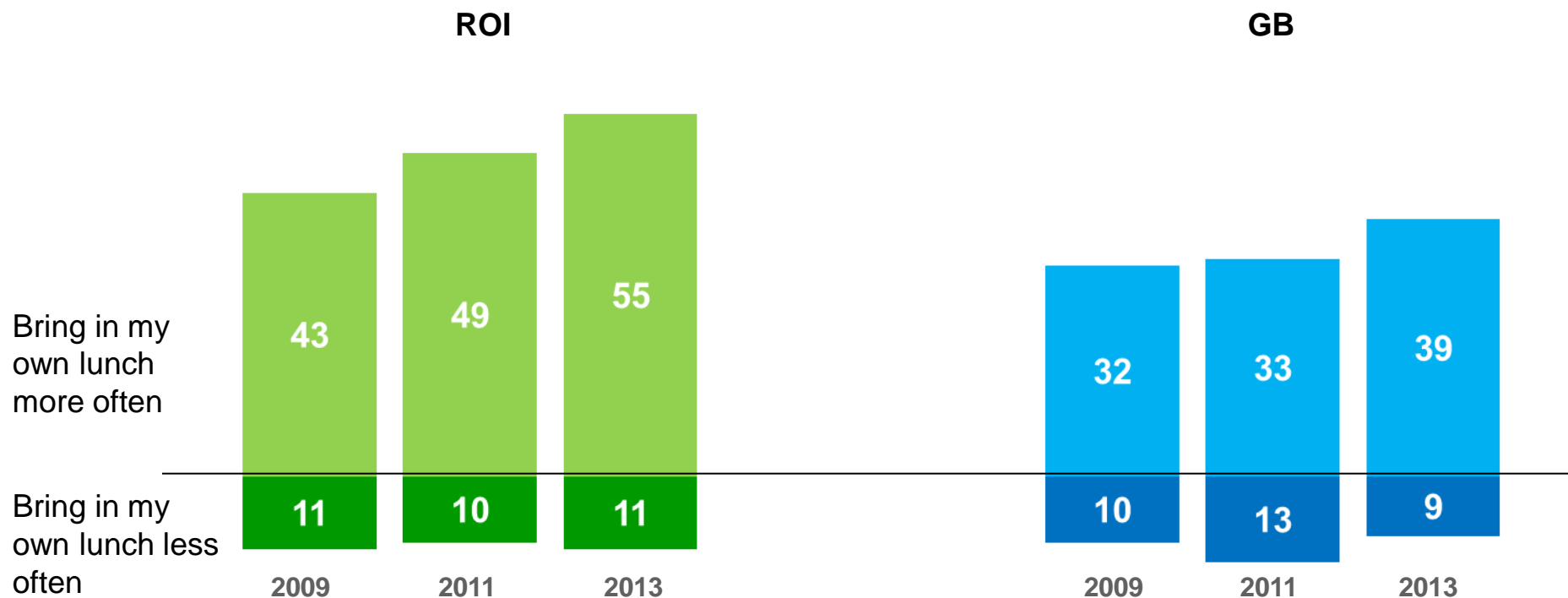
Place where people usually eat lunch



ROI is displaying much stronger tendencies than GB to bring in their own lunch more often than before. This behaviour now represents more than half of adults in ROI.

29

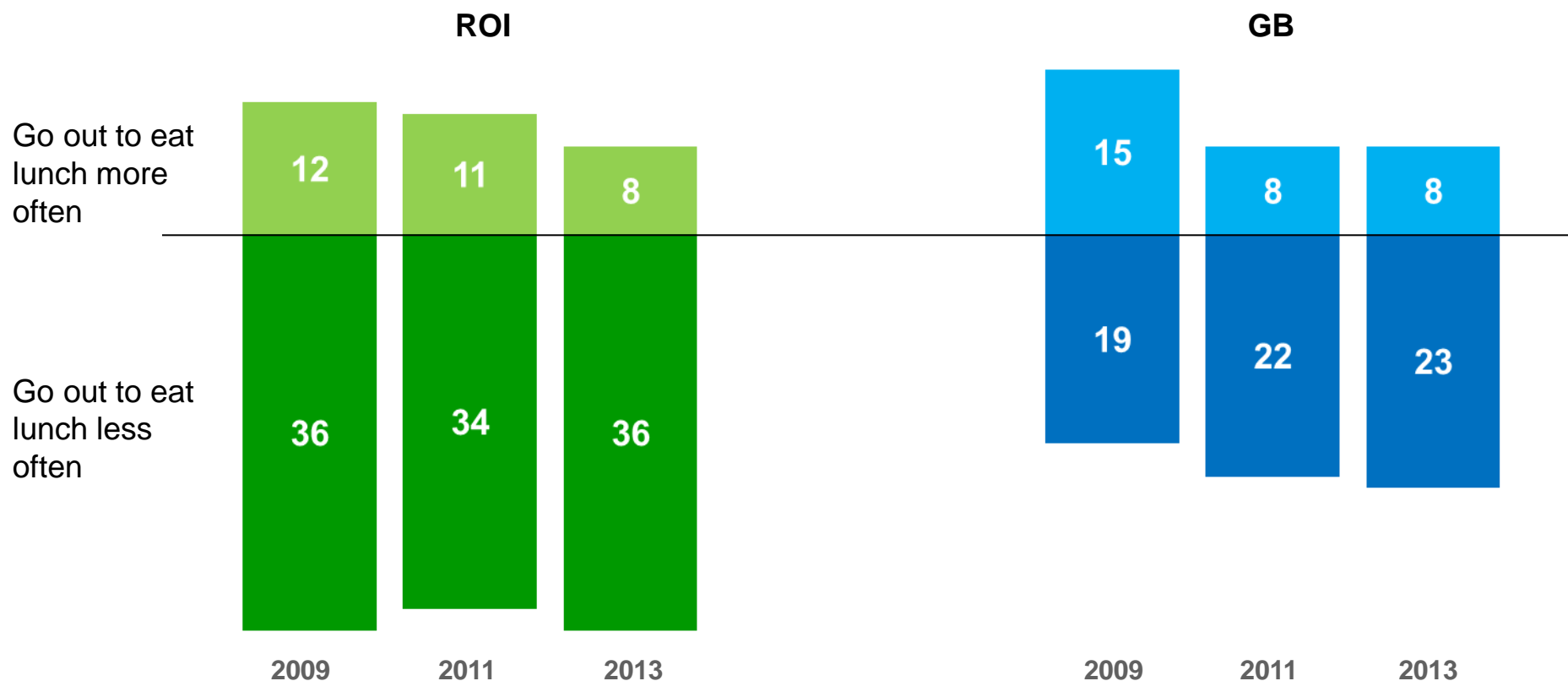
% who bring in their own lunch more often/ less often



Since 2009, ROI has reduced its lunchtime eating out behaviour notably more than that of GB.

30

% who go out to eat lunch more often/less often

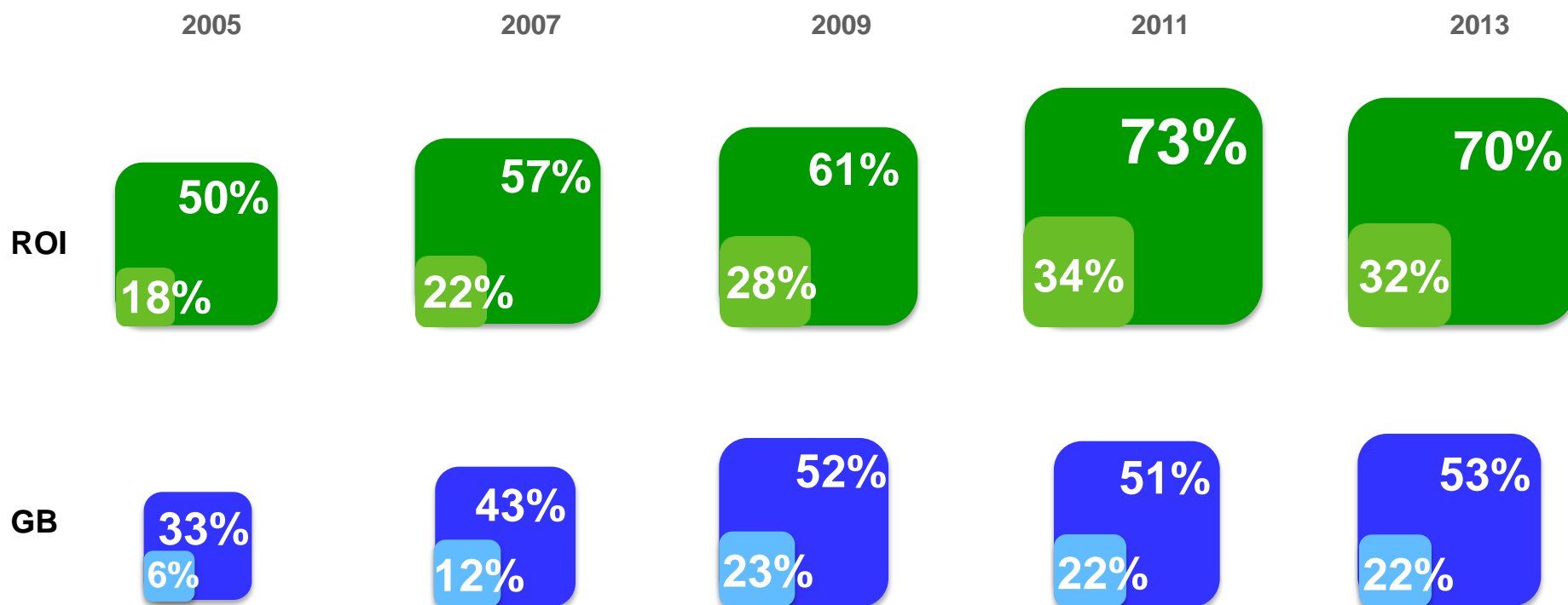


Back To Basics



The importance of buying local food has increased in both regions since 2005. ROI remains much further ahead of GB, even with a slight decline in importance since 2011. 32

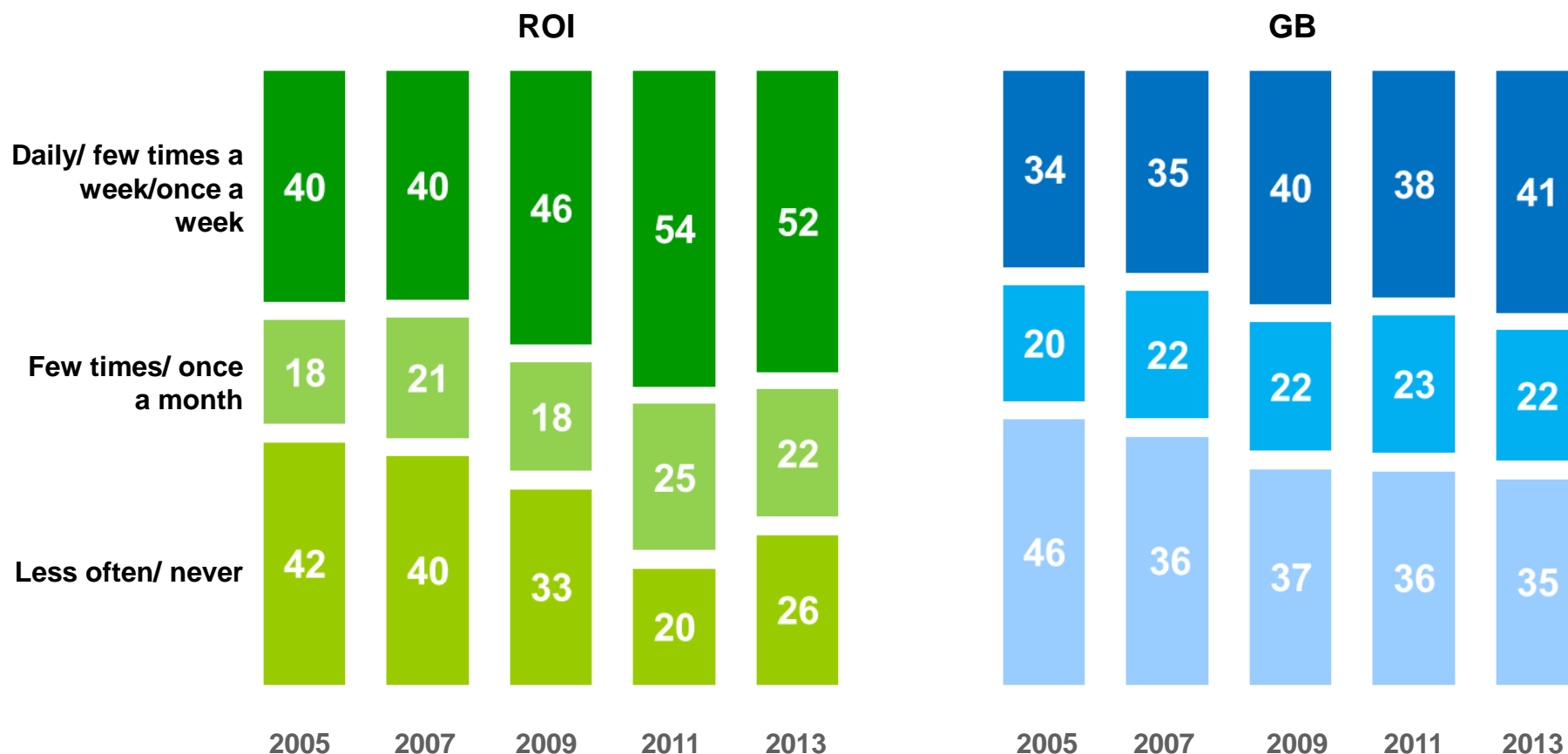
■ **Buying local food is very important** ■ **Total importance of buying local food**



France (73%) and ROI place the most importance on buying local food. GB ranks fourth while the Dutch, at only 27% 'importance', are particularly disconnected from the 'buy local' trend.

The frequency of local purchases in ROI continues to be above those in GB. The proportion of people buying local less often/never has been declining in both regions. 33

Frequency of 'local food' purchases

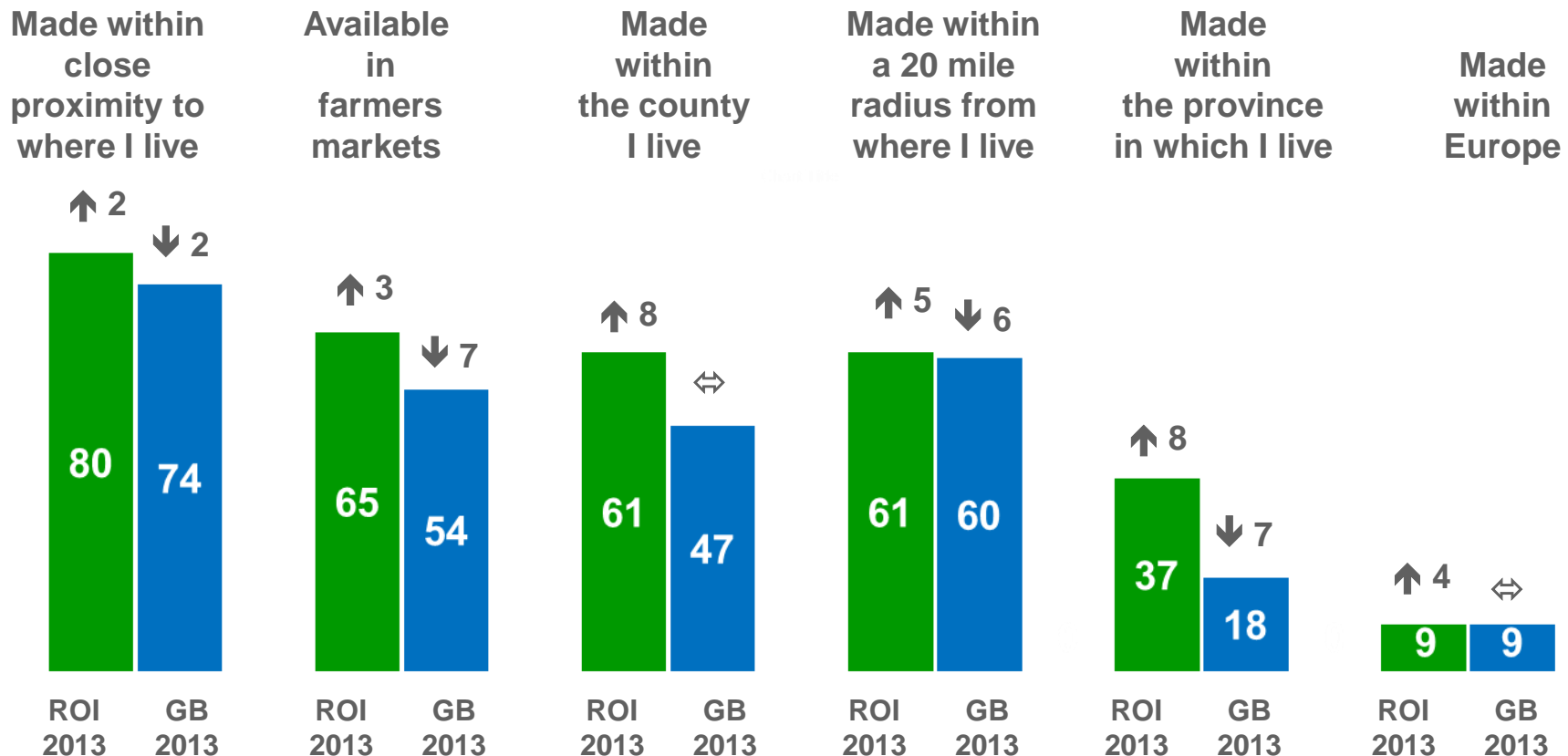


Daily/weekly purchases of local food are considerably higher in Sweden(79%) than in any other country. The Netherlands, GB & ROI have the highest proportion of people who buy local less often/never.

ROI and GB are in overall agreement about what the term 'local food' actually means. Despite this, GB's convictions about the definition of 'local' have declined.

34

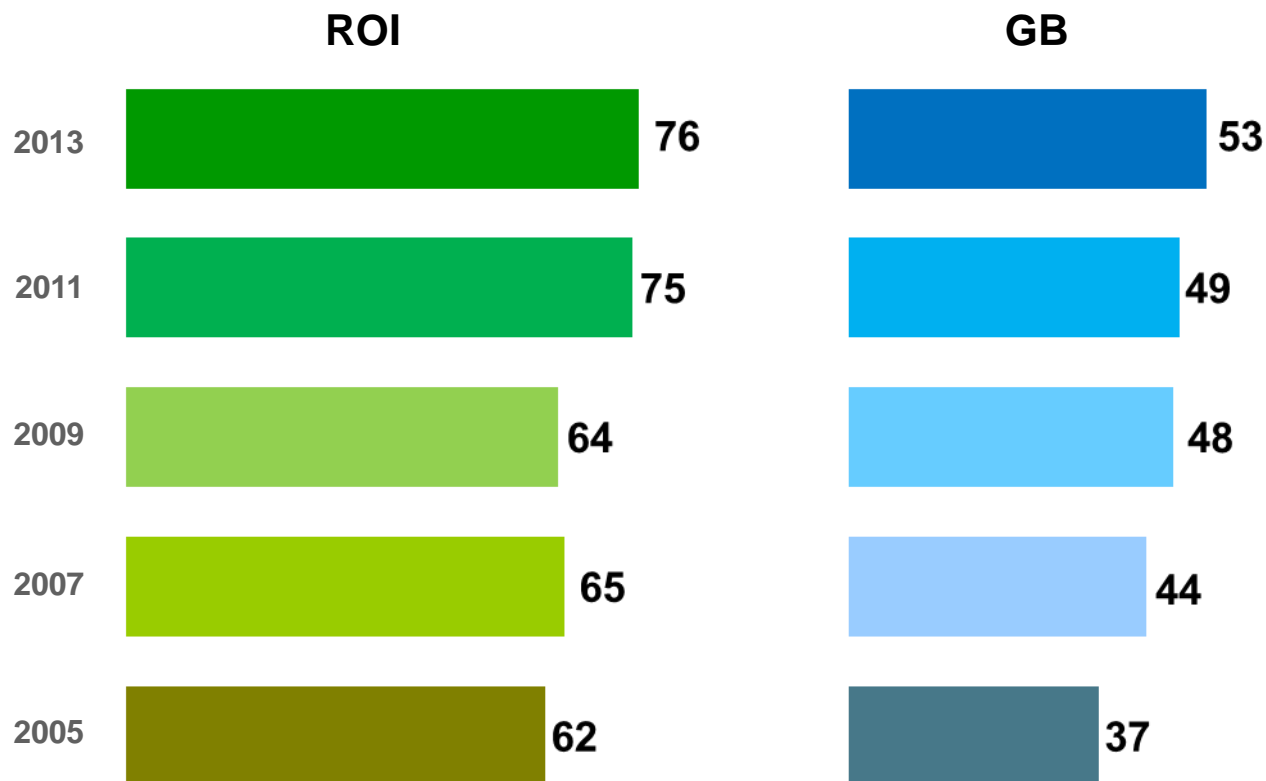
Defining what 'local food' actually means Total%



It is much more important for people in ROI to know where their food has come from than it is in GB and always has been.

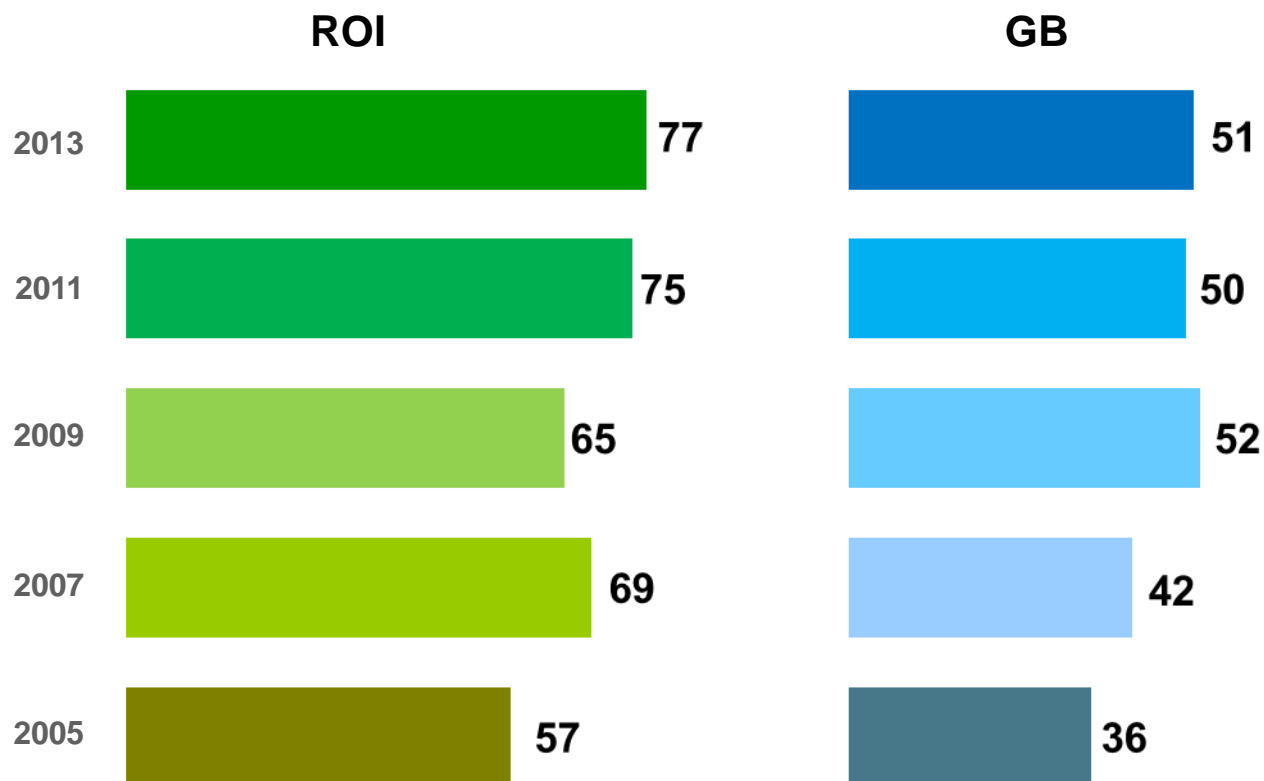
35

% agree that they like to know the area where their food has come from



Local foods give Irish adults a greater sense of confidence in terms of food safety. Only half of all adults in GB believe local food to enhance their food safety confidence levels.³⁶

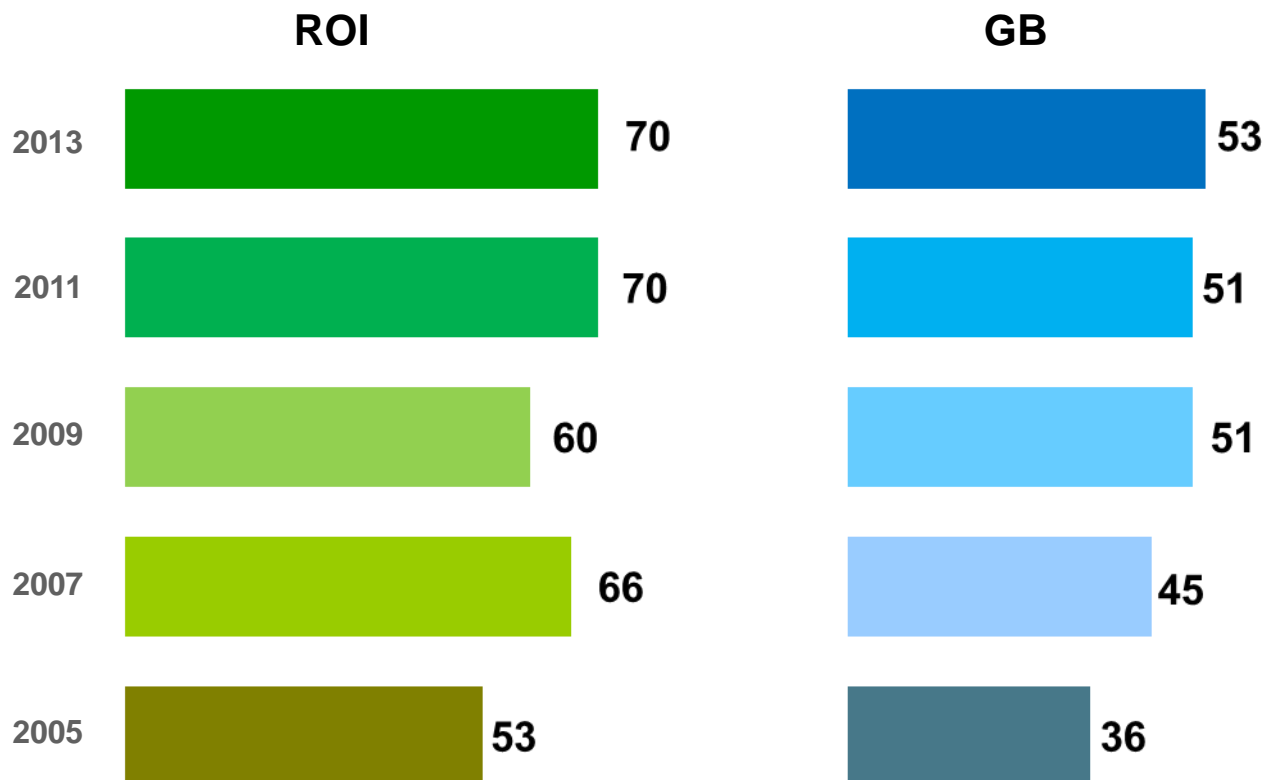
% agree that they are more confident in the safety of food produced in their local area



The association between local foods and a 'natural' product is also considerably stronger in ROI than in GB.

37

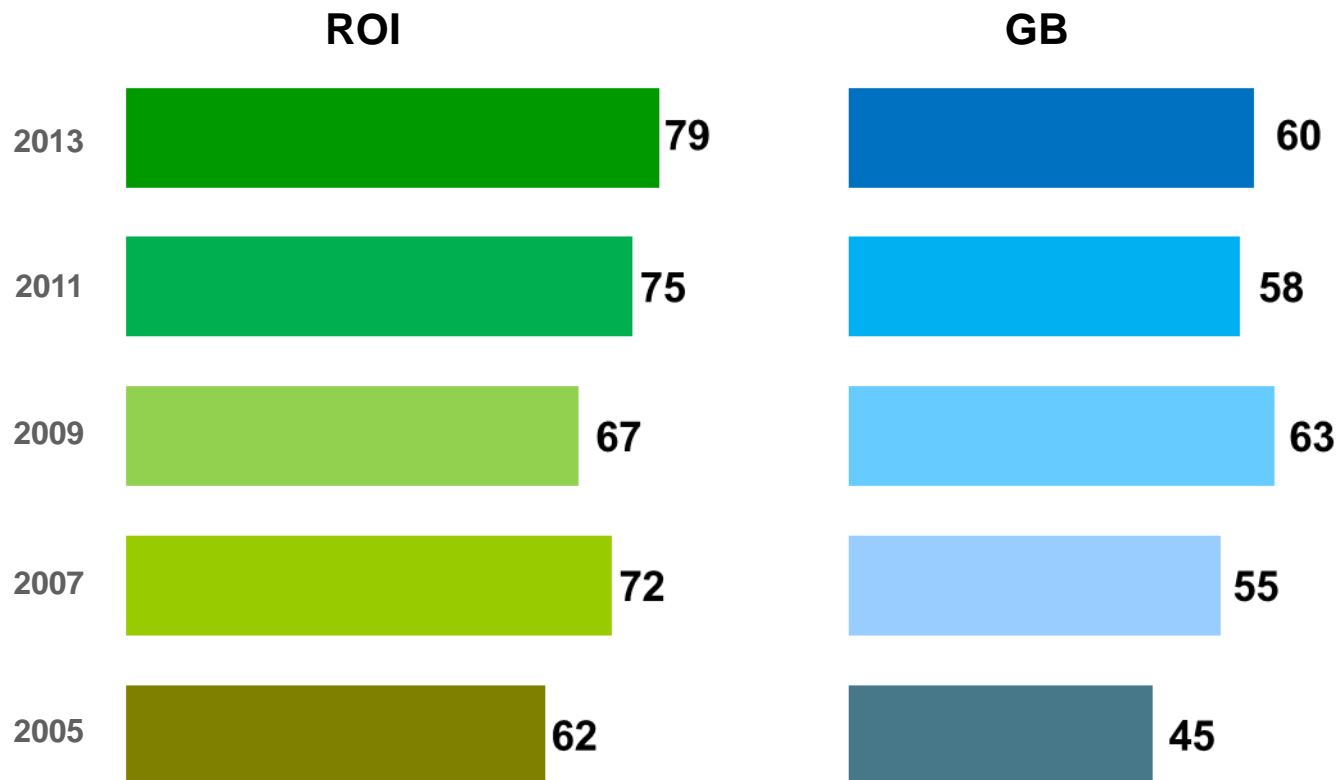
% agree that food produced locally has less preservatives and artificial ingredients



Adults in ROI are much more convinced than their GB counterparts about the superior quality of local products and have been increasingly supportive of this idea.

38

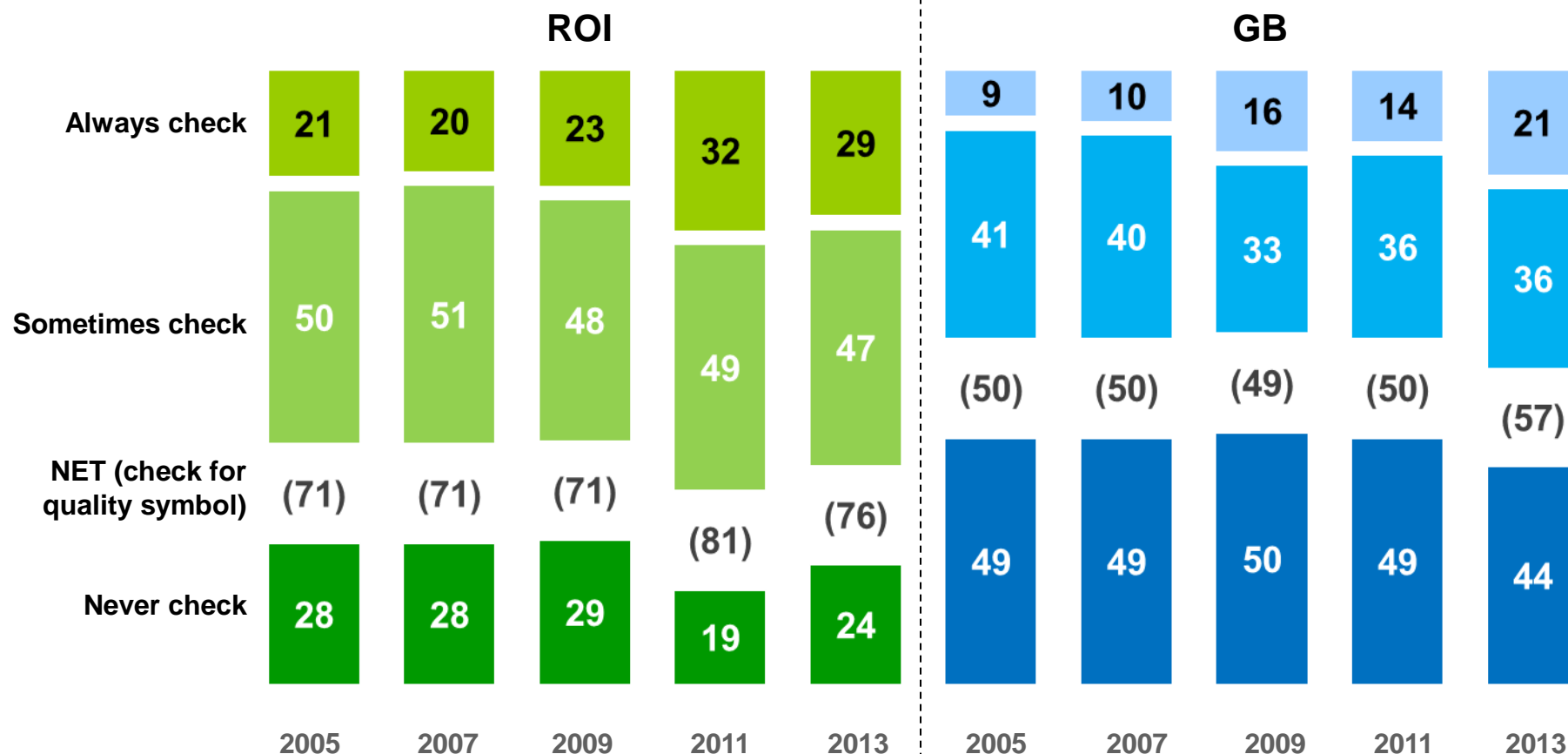
% agree that food produced locally results in higher quality products



Checking for the symbol of quality is done significantly more often in ROI than in GB. Overall levels of vigilance in both regions have not changed dramatically since 2005.

39

Checking for Symbol of Quality label

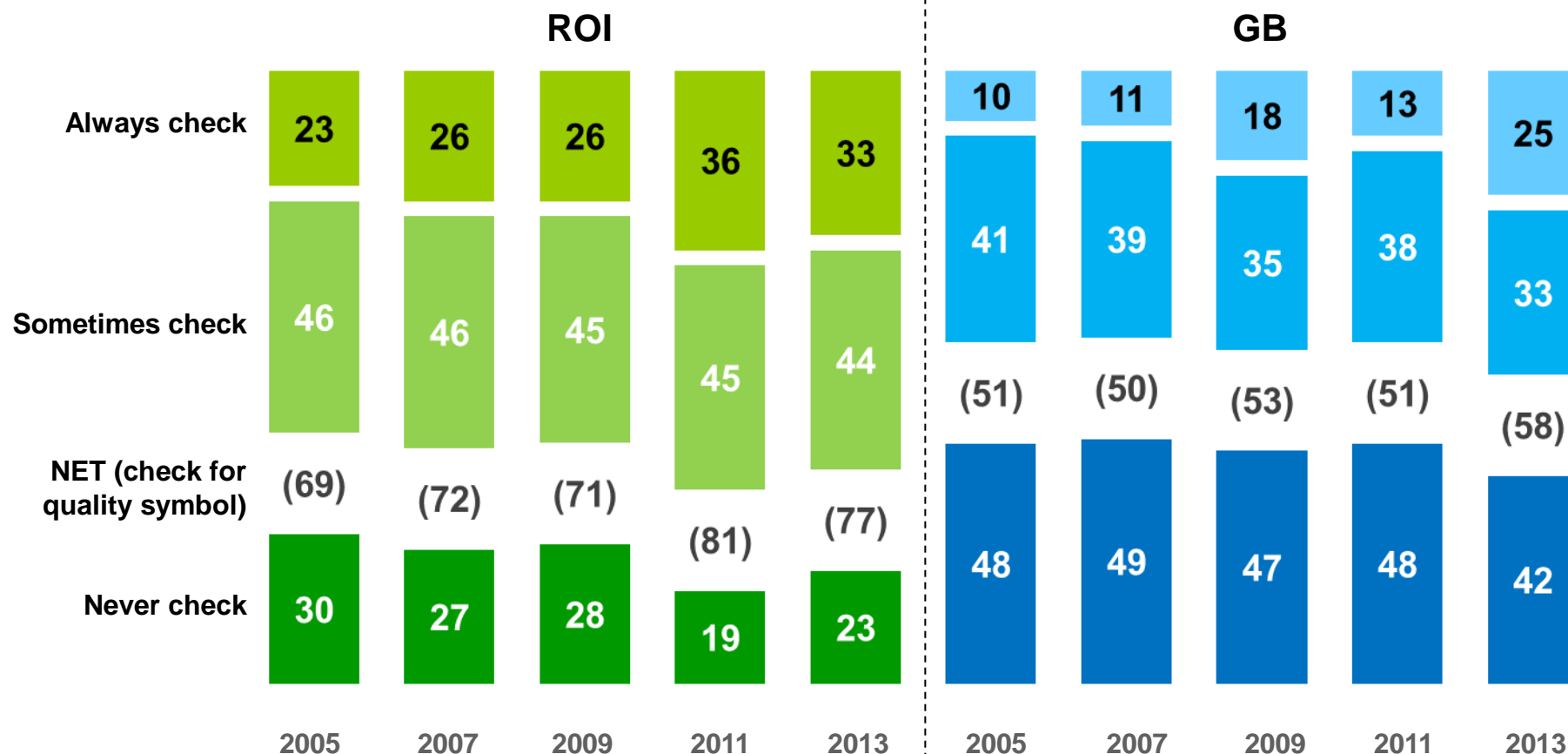


Checking for quality symbol is highest in Spain and Sweden. France & ROI follow close behind. In GB, this label carries the least weight for grocery shoppers.

The importance of provenance in ROI is evident in its higher propensity to check for country of origin. Those who never check this information in GB is double that of ROI.

40

Checking for Country of Origin label

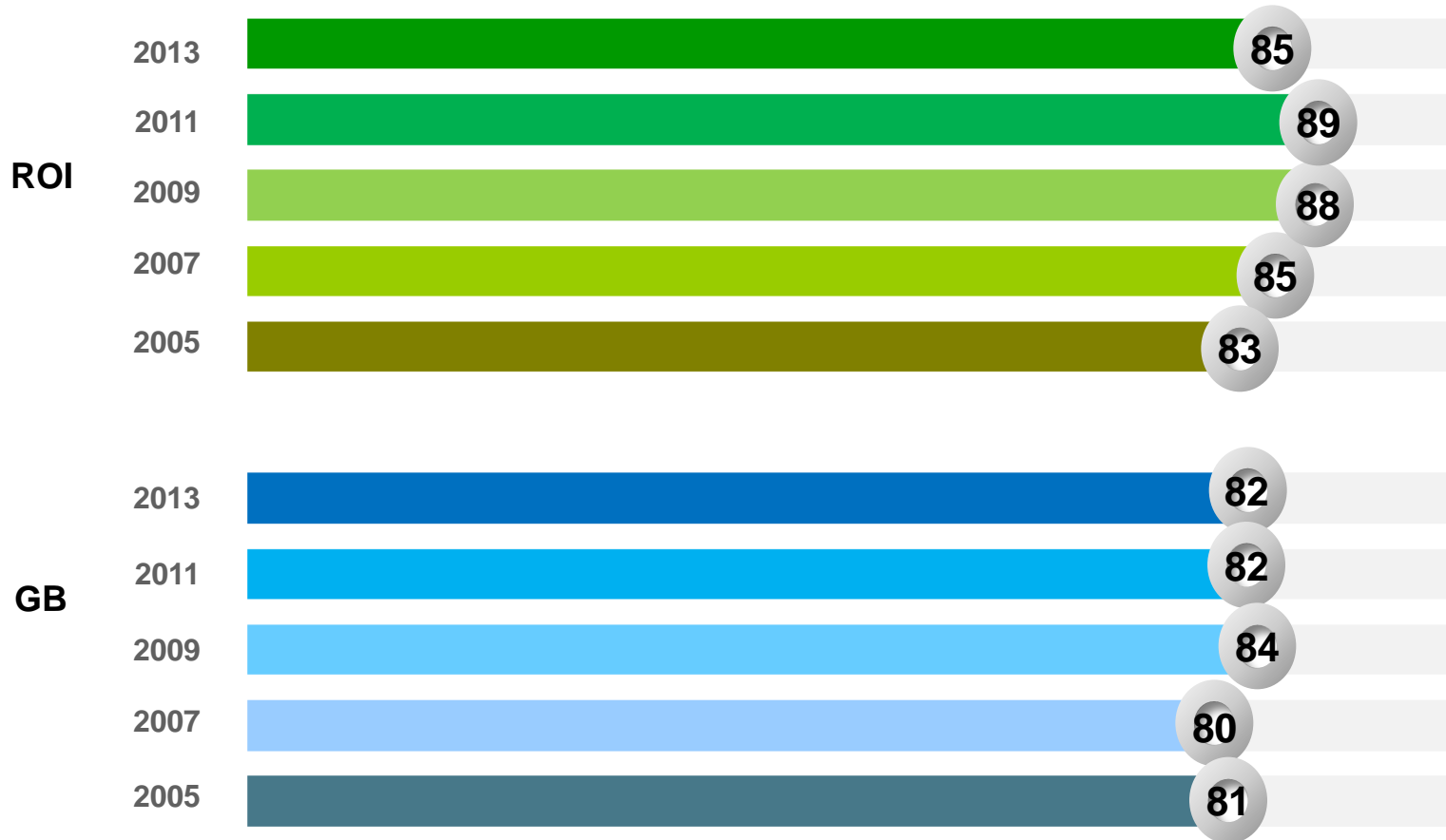


GB shows the least likelihood for checking for country of origin on food products while Sweden shows the most. ROI ranks in the middle of all ten countries.

More than eight in ten adults in ROI & GB consider 'spending time over dinner as a family' to be important.

41

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



Spending time together as a family at mealtimes is important in all countries, certain countries seem to hold this practice in higher regard. ROI & GB rank in the bottom four however.

Food & Sustainability



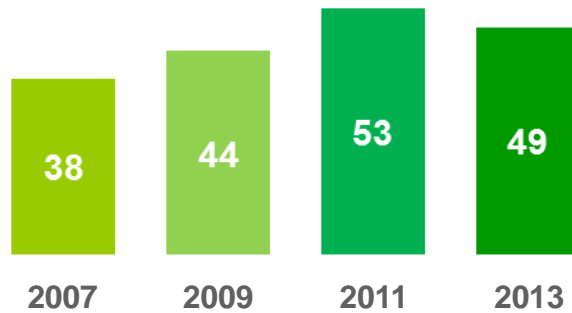
ROI's slightly higher awareness of the term food miles is also supported by a slightly higher tendency to purchase foods with the low food miles message.

43

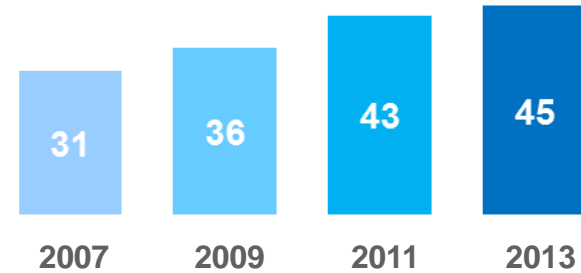
% aware of Food Miles*

* New question wording for ROI & GB in 2013

ROI



GB



% who buy foods with low food miles in 2013



TOTAL % who buy foods with low food miles



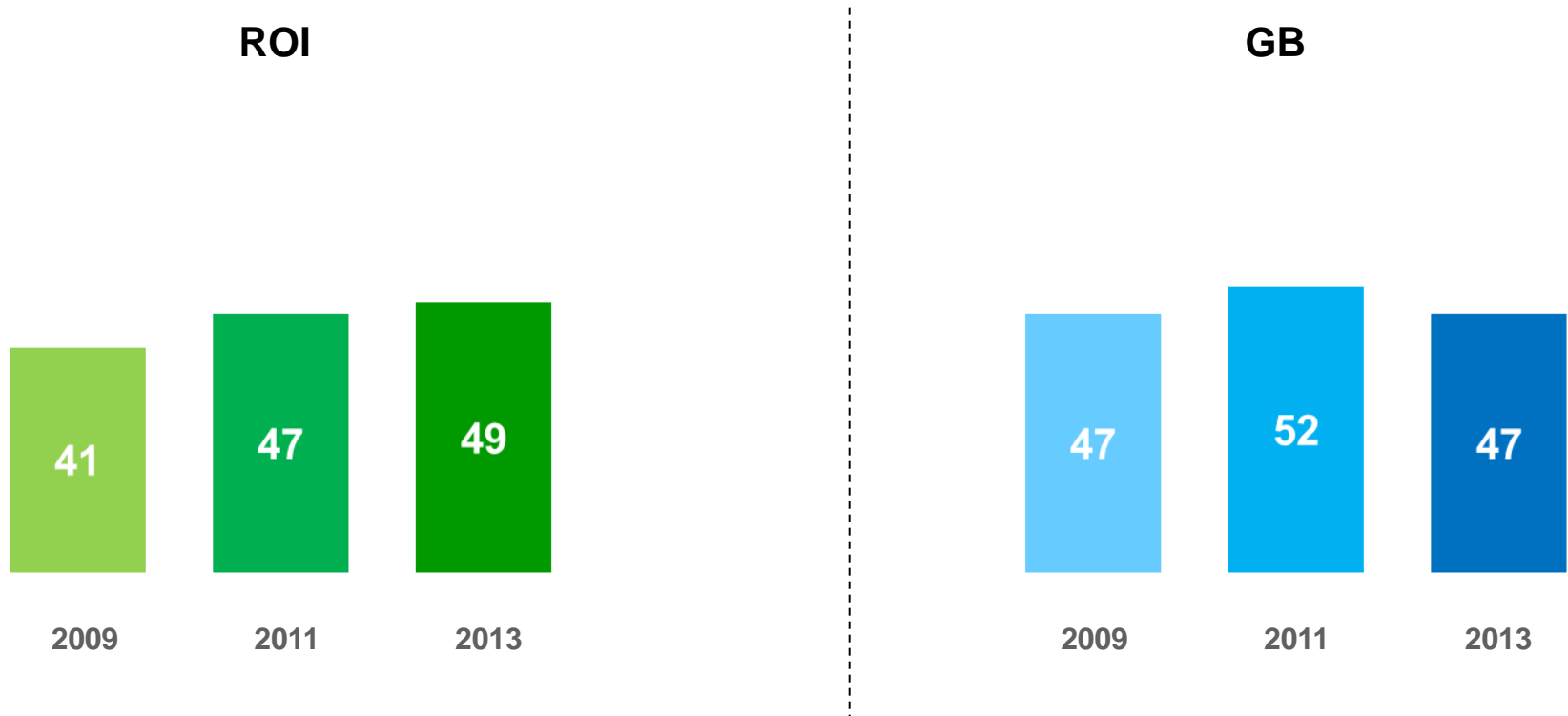
% who sometimes try to buy food with low food miles

Awareness levels of food miles in ROI and GB are better than those in Spain, Sweden, the Netherlands and the US. Purchase levels of food with low food miles are behind that of Germany, Belgium, France and Sweden.

Awareness of sustainability is quite similar in both regions. However, while awareness in ROI has been rising since 2009, GB have failed to advance on their position.

44

% aware of sustainability



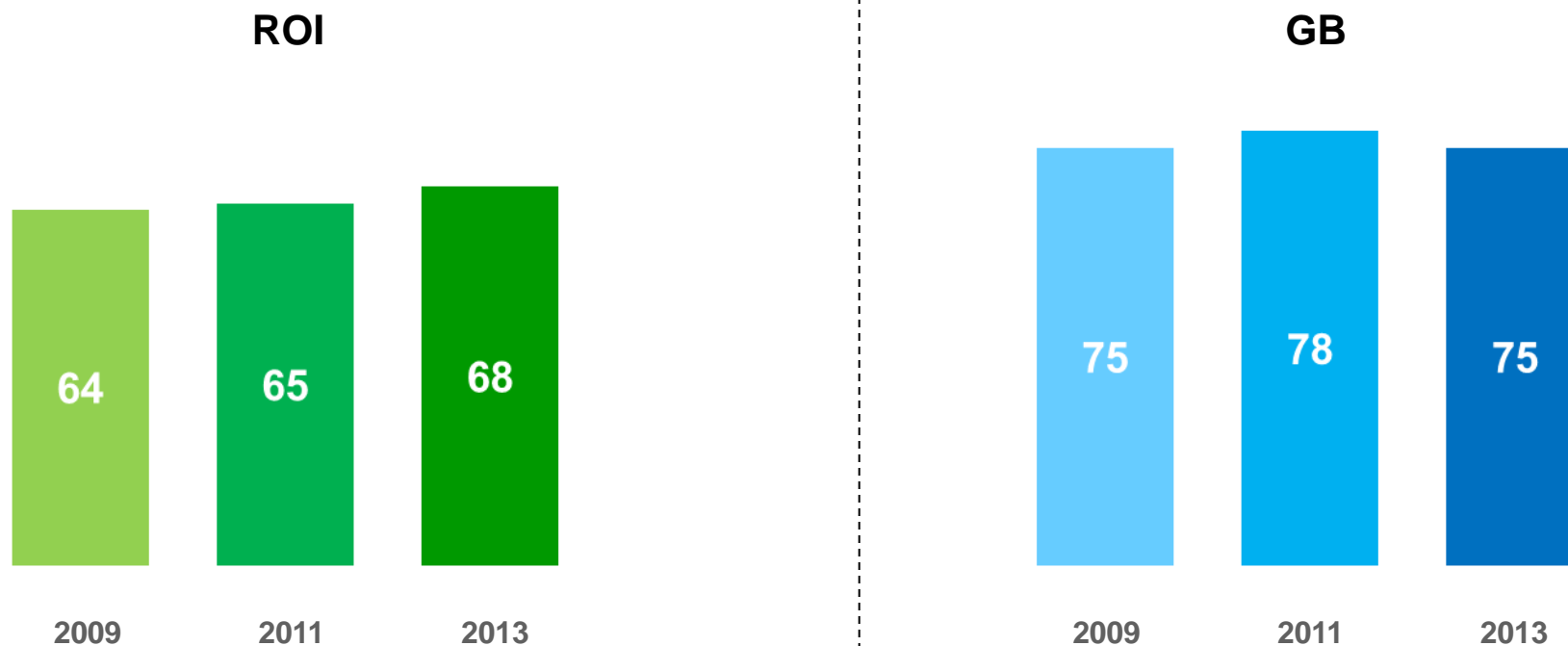
* New question wording for ROI & GB in 2013

GB and ROI rank last and second last, respectively, when it comes to awareness of sustainability. All other countries have awareness of above 70%, with France highest at 92%.

Awareness of carbon footprint is higher in GB than in ROI. Reassuringly however, ROI's awareness levels have shown signs of steady advancement.

45

% aware of carbon footprint



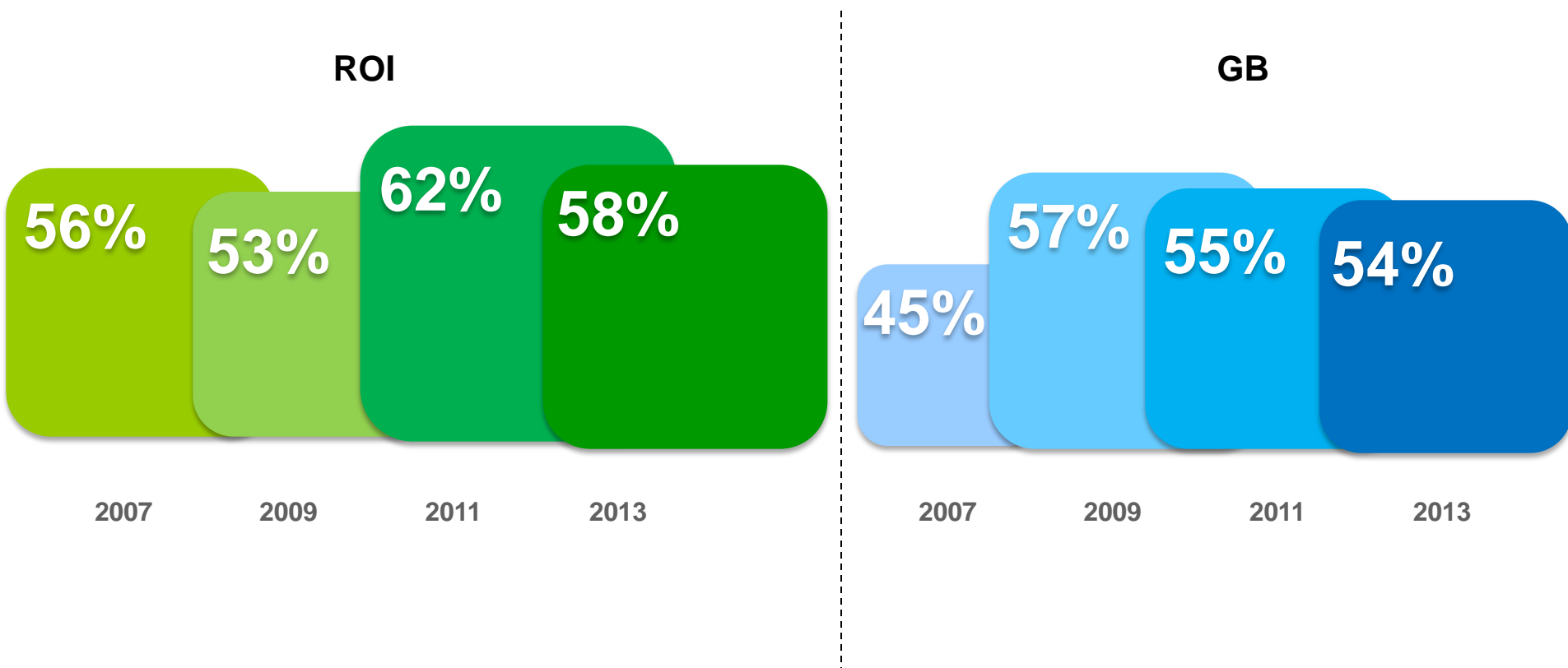
* New question wording for ROI & GB in 2013

When it comes to carbon footprint, GB and ROI have greater awareness levels than Spain, Germany, the Netherlands and Sweden. However, they still have some ground to make on NZ (89%).

Both regions display a fading commitment to conscious consideration of environmental issues when choosing what products to buy.

46

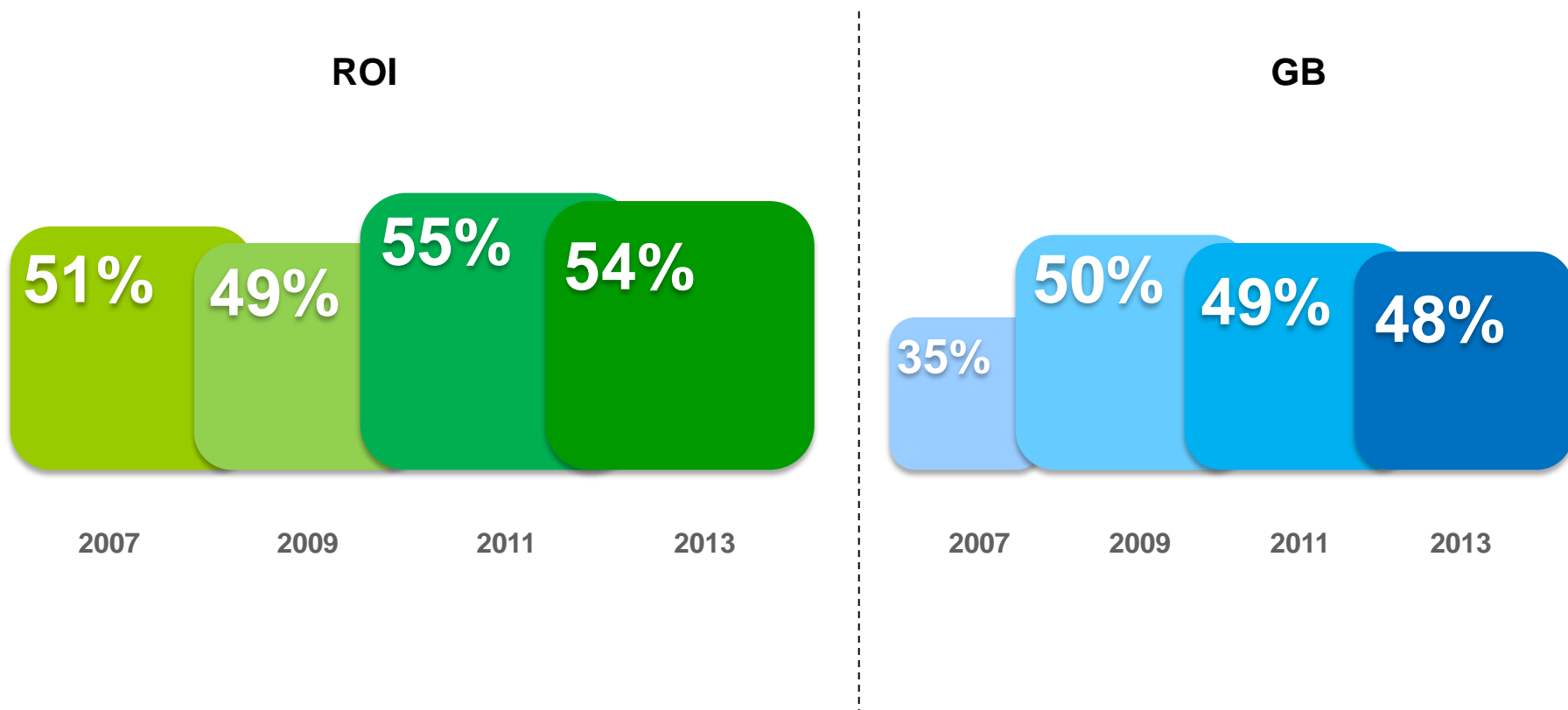
**% who agree that they are more conscious of environmental issues
in their choice of products**



ROI's consciousness of environmental issues when choosing products ranks third in the PERIscope 2013 study. GB displays average levels of agreement with the statement.

The percentage of people who prefer to buy from environmentally conscious companies is also declining. However, ROI remains somewhat more buoyant than GB. ⁴⁷

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



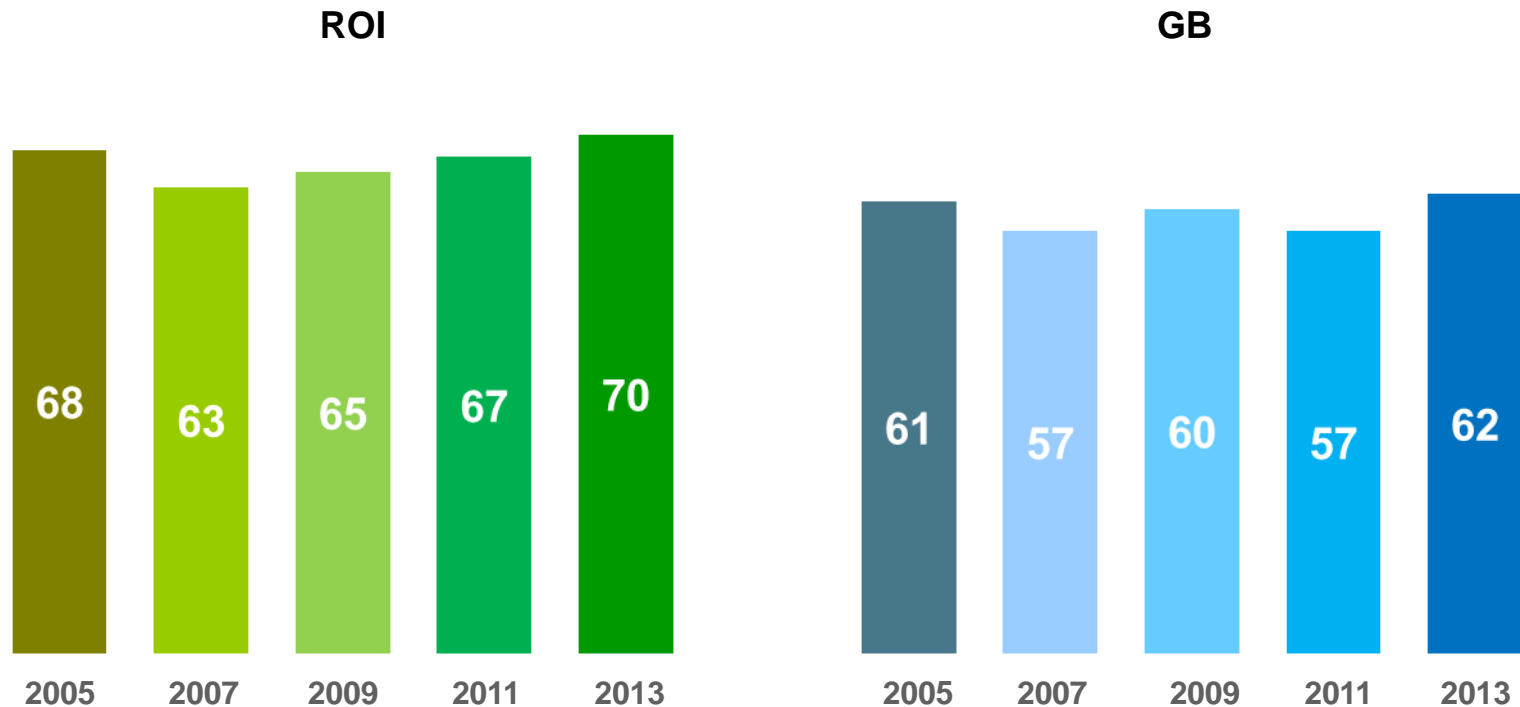
Buying from companies that are environmentally conscious is most popular in Sweden and Spain. ROI shows average agreement levels while GB ranks second last behind the Dutch regarding this behaviour.

ROI displays a slightly higher tendency than GB to buy food in smaller packs. Both countries have increased efforts in this area since 2007.

48

I buy food in smaller packs because it means less waste

% Applies

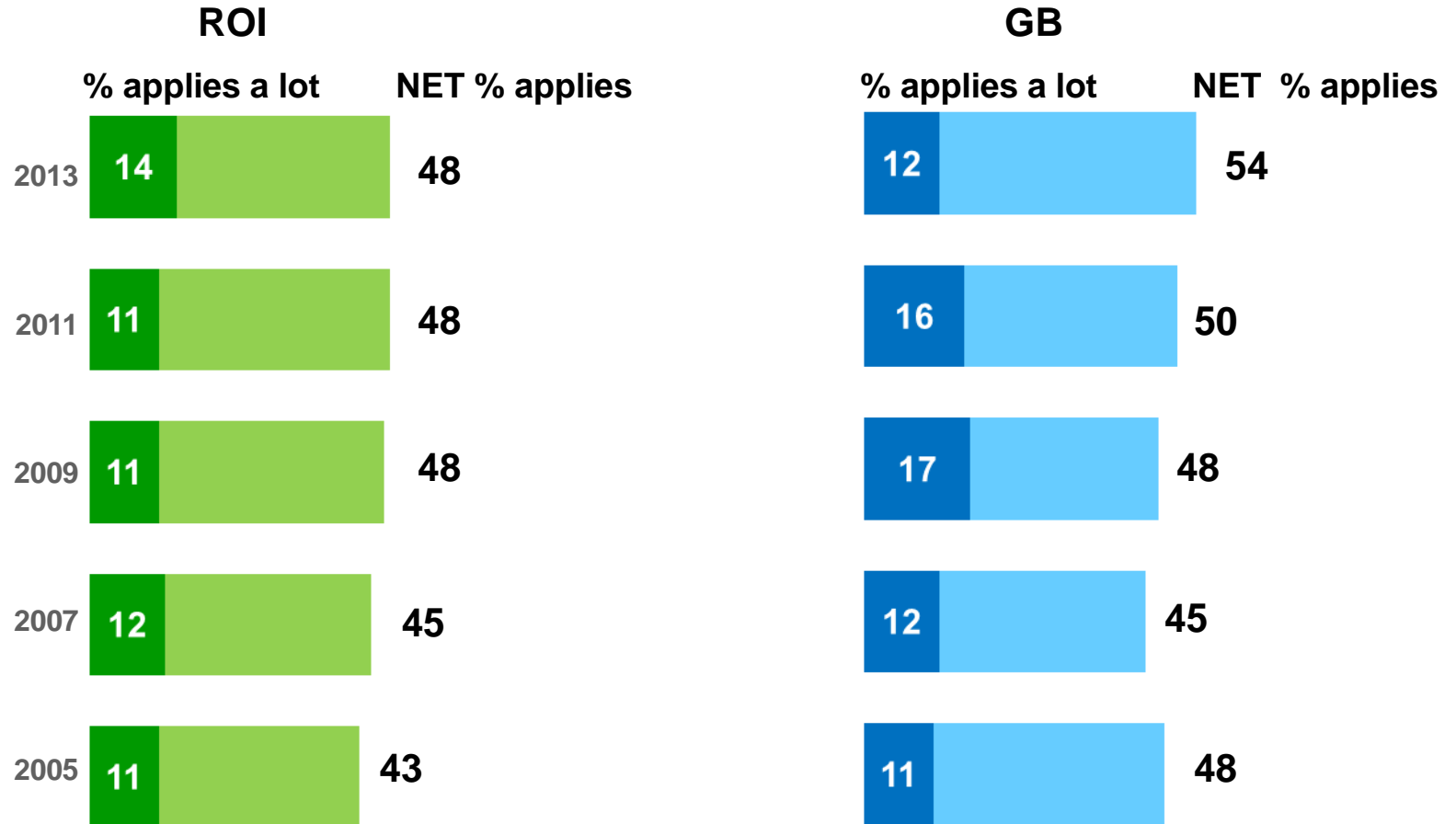


ROI and GB rank third and fourth respectively when it comes to the proportion who claim to buy food in smaller packs because it means less waste.

Efforts to buy Fair Trade products are stronger in the GB than in ROI. While these efforts have stagnated in ROI, they have shown signs of progression in GB.

49

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



Efforts to buy Fair Trade products are lowest in the US, ROI and GB.

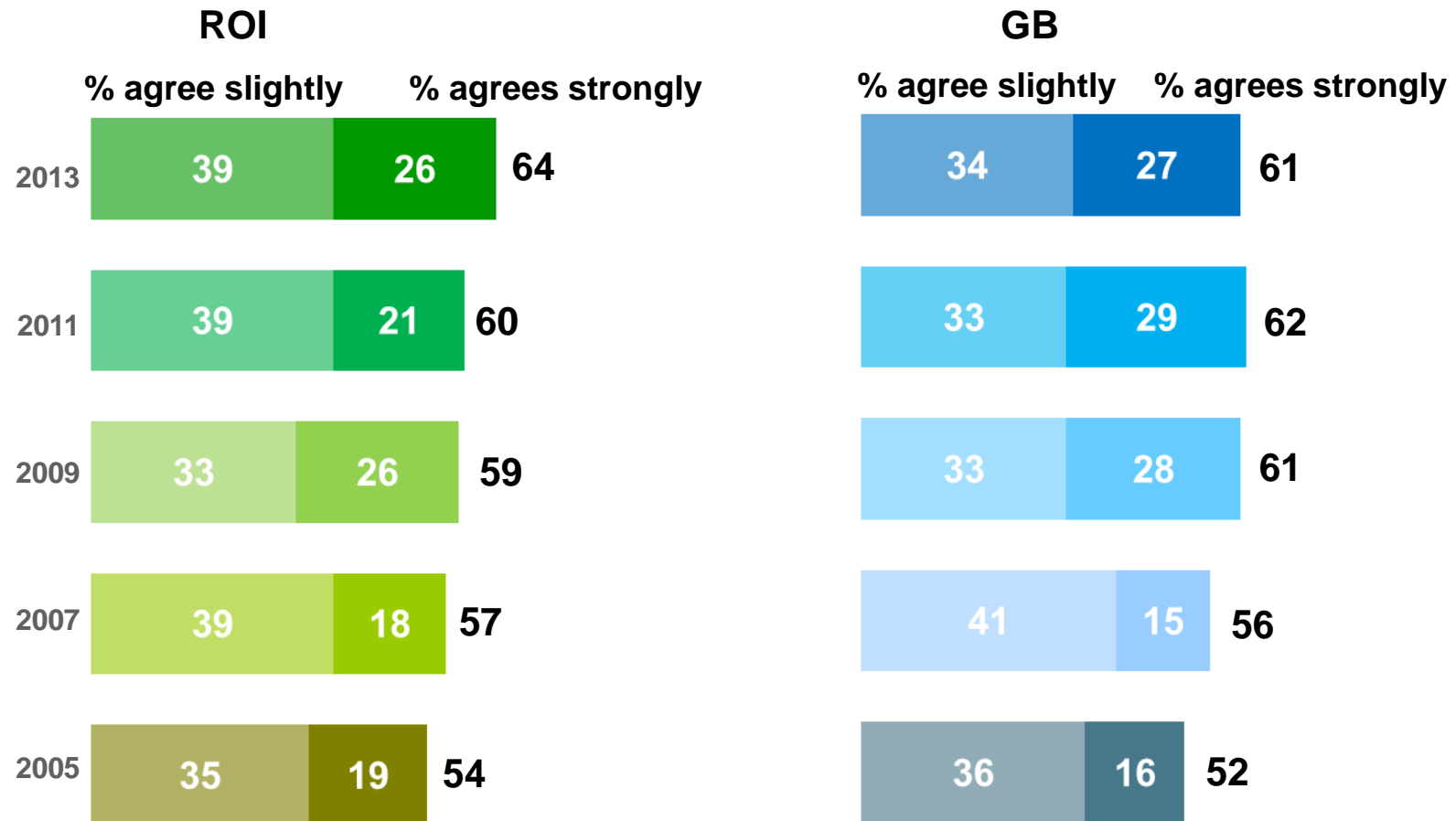
Shopping Around



Grocery shoppers in ROI and GB are fairly equally concerned about price when shopping for food. ROI's preoccupation with price has been steadily increasing.

51

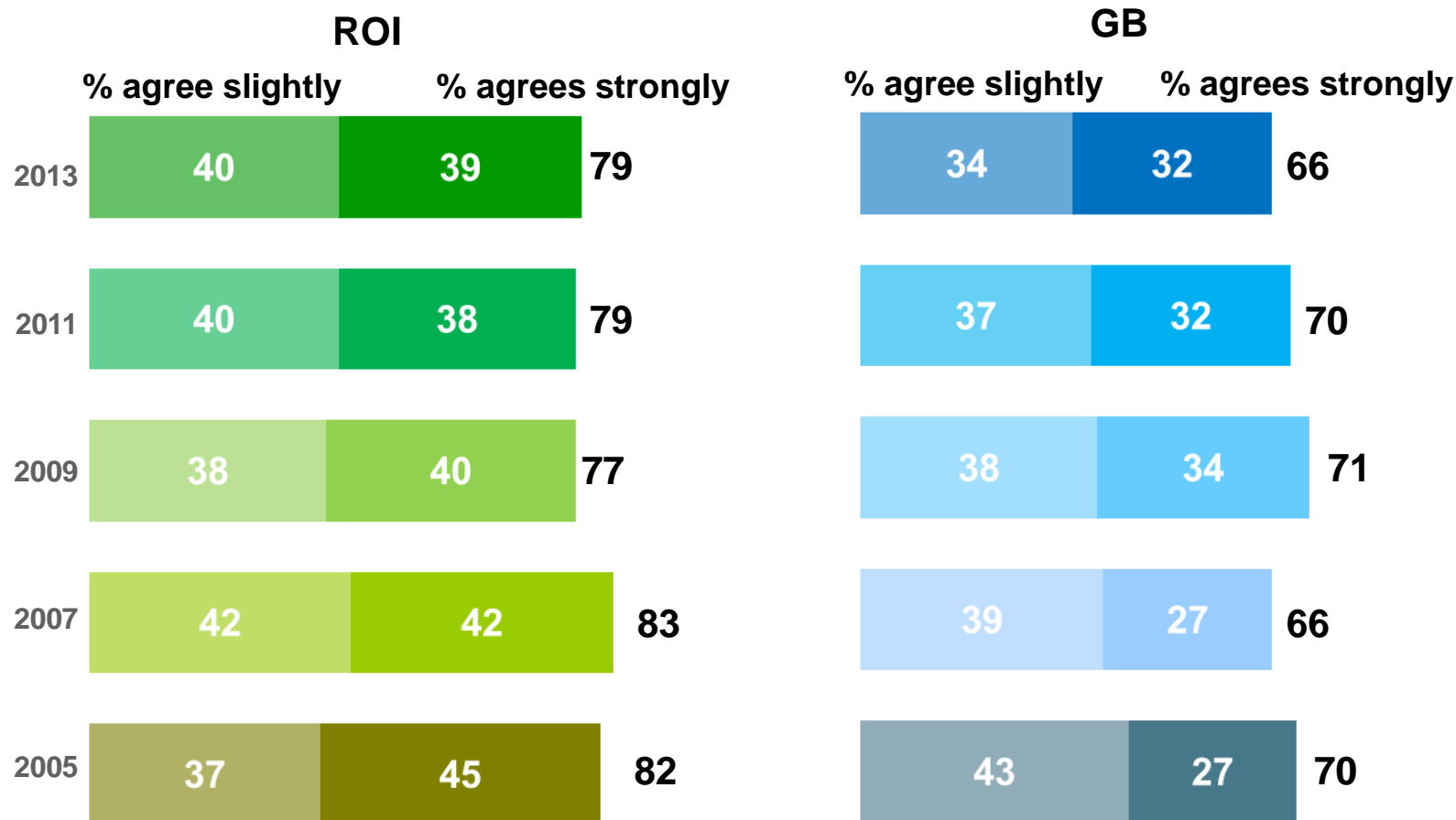
When I shop the first thing I look for is price



Looking at price first when shopping for grocery items shows that NZ is the only country that ranks above ROI on this particular statement. GB ranks fourth behind the US while agreement in Sweden is lowest (38%).

ROI believes, more strongly than GB, that the quality of food is more important than price. The importance placed on quality over price has been declining in GB since 2009.⁵²

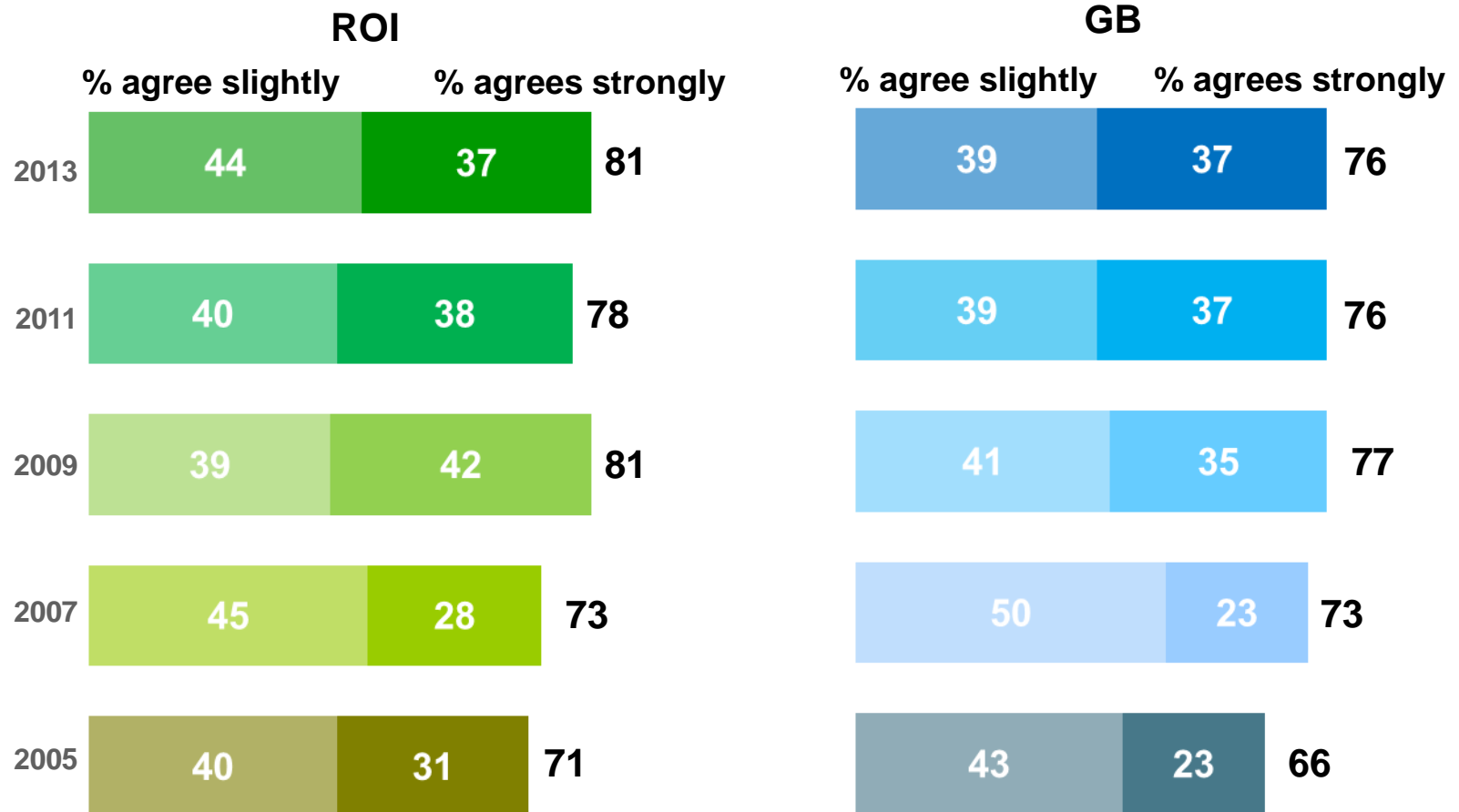
Quality of fresh food is more important than price



With regard to placing quality above price, ROI ranks first across the PERIscope 2013 study. Sweden and Spain are also supportive of this idea while GB ranks fourth.

The practice of looking for value for money has maintained its popularity at 2009 levels, when the behaviour gained considerable momentum compared to previous years.

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



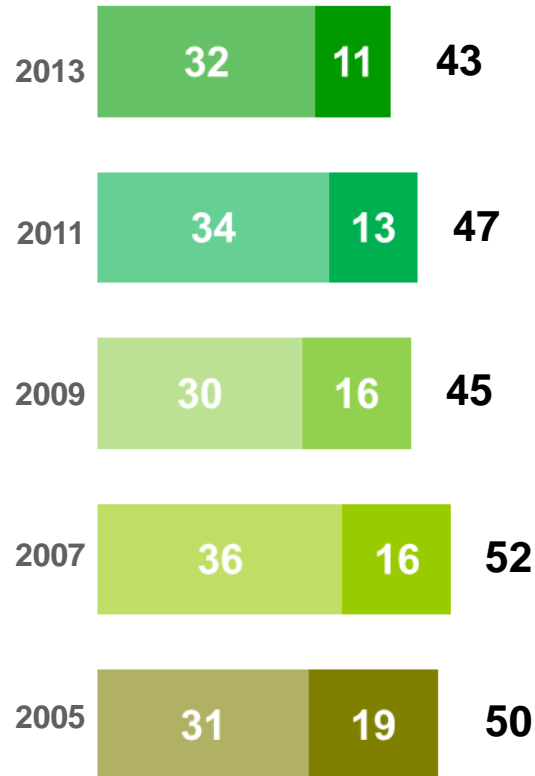
ROI ranks second and GB ranks fifth when it comes to looking for the best value for money. NZ (84%) is most intent on getting value for money while German (56%) shoppers are the least driven by value.

Less than half of grocery shoppers are willing to pay more for better customer service. However, ROI tends to have a higher willingness than GB to pay this premium.

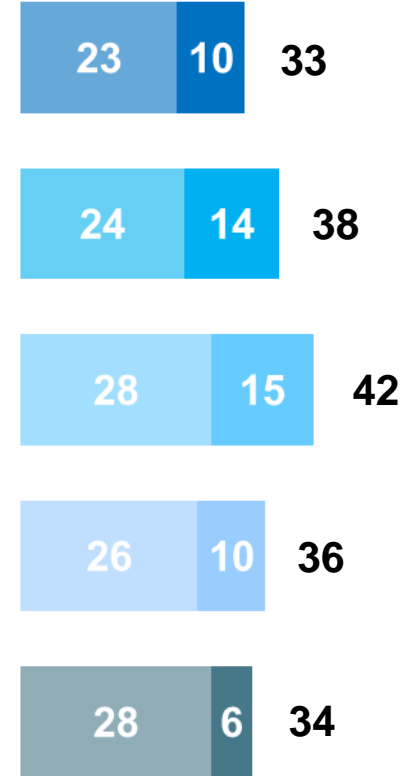
54

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

ROI
% agree slightly % agrees strongly



GB
% agree slightly % agrees strongly

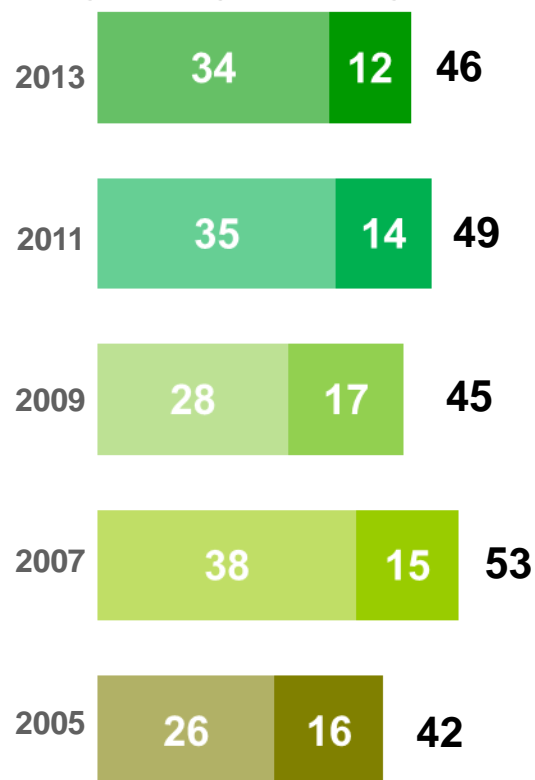


Spain and Sweden display the highest willingness to pay more for good customer service. ROI ranks third while GB is fifth. The Dutch are the least willing to pay more.

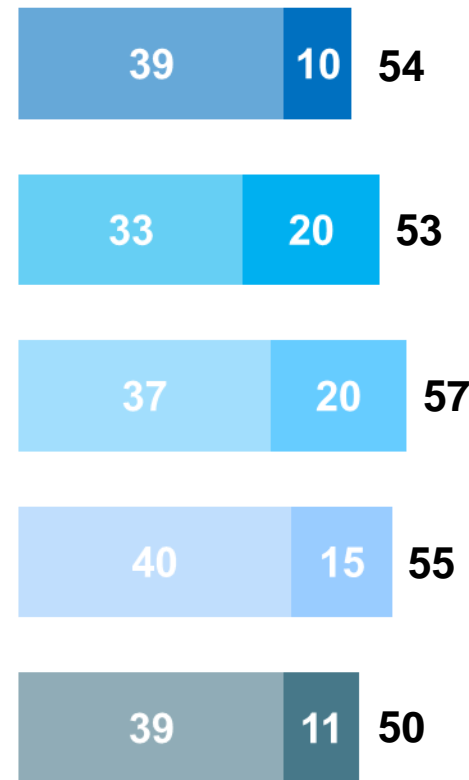
GB grocery shoppers tend to be more impulsive than ROI grocery shoppers. Since 2007, ROI has been reducing its tendency to be impulsive, even when products are cheap. ⁵⁵

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

ROI
% agree slightly % agrees strongly



GB
% agree slightly % agrees strongly



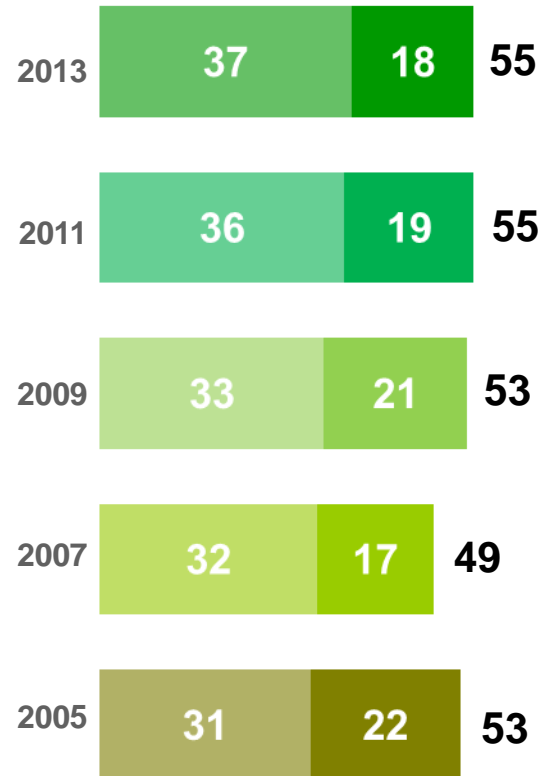
Grocery shoppers in GB admit to being the most impulsive when it comes to buying cheap products. NZ and ROI are next. France is the most disciplined (17%).

Willingness to spend time looking for a bargain has increased in ROI since 2007. Behaviour in GB, in the same period, has remained relatively stable.

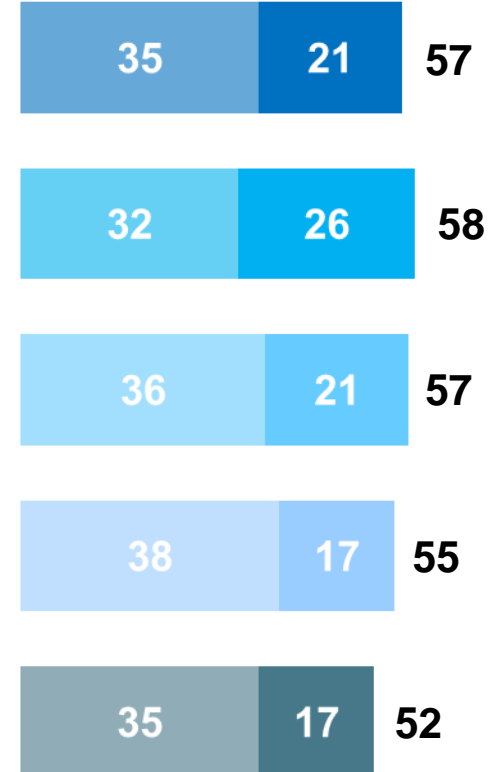
56

I don't mind spending time looking for a bargain

ROI
% agree slightly % agrees strongly



GB
% agree slightly % agrees strongly



The US are the most willing to spend time looking for a bargain. GB and ROI rank third and fourth respectively.

GB has a significantly higher proportion of people shopping for groceries online. These shoppers are also considerably more active than online grocery shoppers in ROI.

57

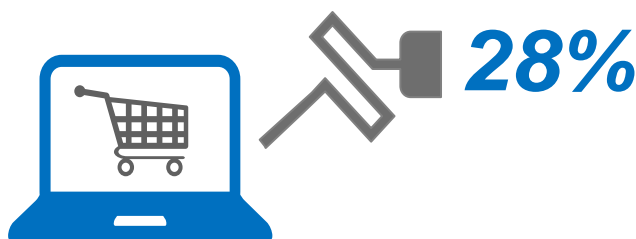
**% ever ordered their
grocery shopping
online**



**How often are they ordering their
grocery shopping online?**



- Daily/few times a week
- Once a week
- 2-3 times a month
- Once a month
- Less often



- Daily/few times a week
- Once a week
- 2-3 times a month
- Once a month
- Less often

Spain has the highest proportion of online grocery shoppers (30%), slightly ahead of GB. France are the most frequent online grocery shoppers while ROI are the least frequent.

ROI and GB have a similar proportion of people who have used the internet to download a recipe with both cohorts displaying their recent activity levels.

58

38%

Downloaded
Recipe



36%

Downloaded
Recipe



Most recent download activity



7%

12%

11%

9%

8%

12%

10%

6%

Past
Week

Past
Month

Past 6
Months

Longer
Ago

Past
Week

Past
Month

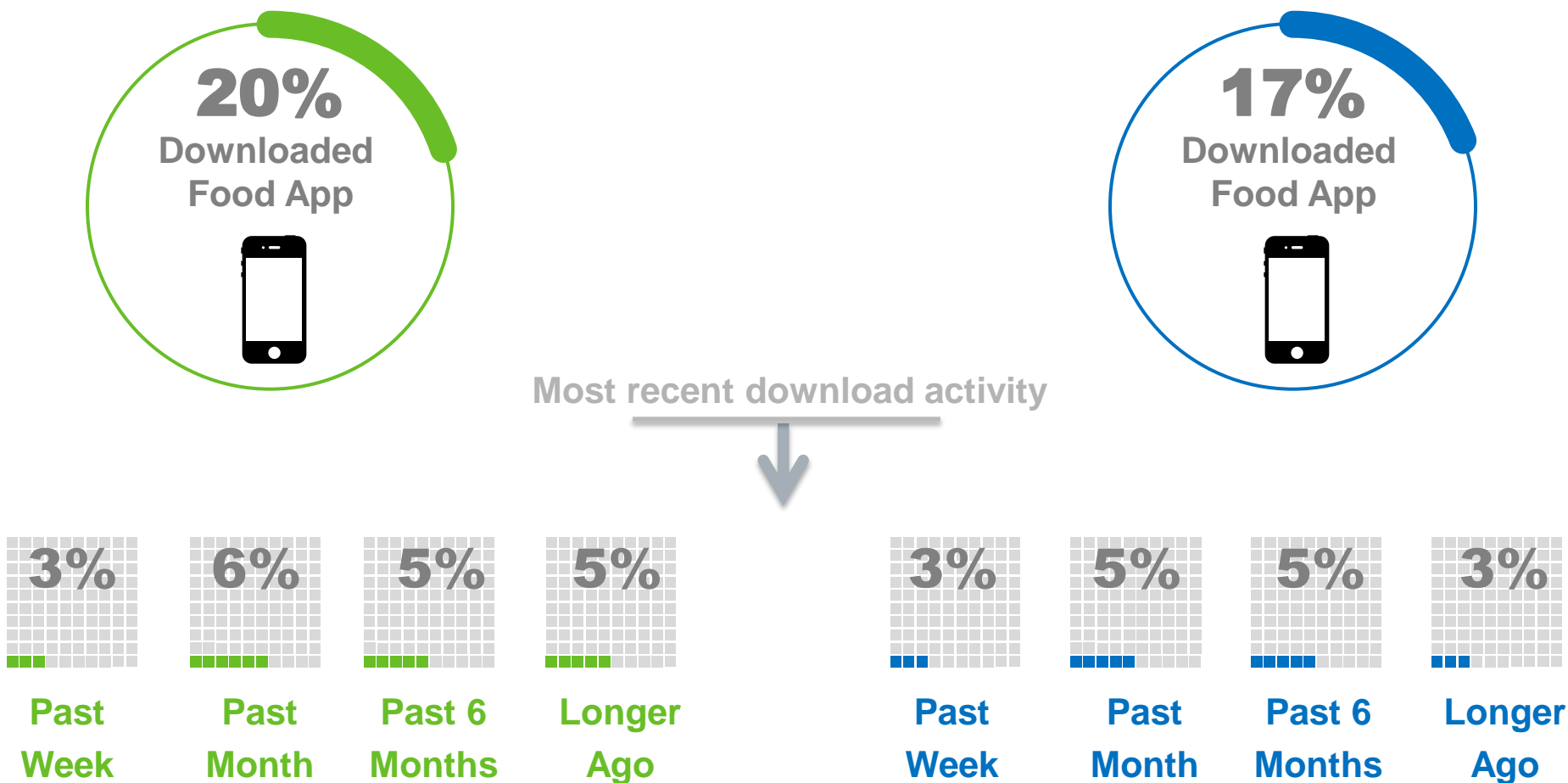
Past 6
Months

Longer
Ago

ROI & GB have the lowest reported incidence of using the internet to download a recipe. In comparison, eight in ten adults in NZ claim to have used the internet to download a recipe.

Downloading specialist food apps is not a particularly popular activity in either region. The majority have downloaded their app between one week and 6 months ago.

59



Downloading Food Apps is a behaviour that is yet to be established amongst the majority in all countries. However, more than one third of adults in Sweden and Spain claim to have engaged in this activity.

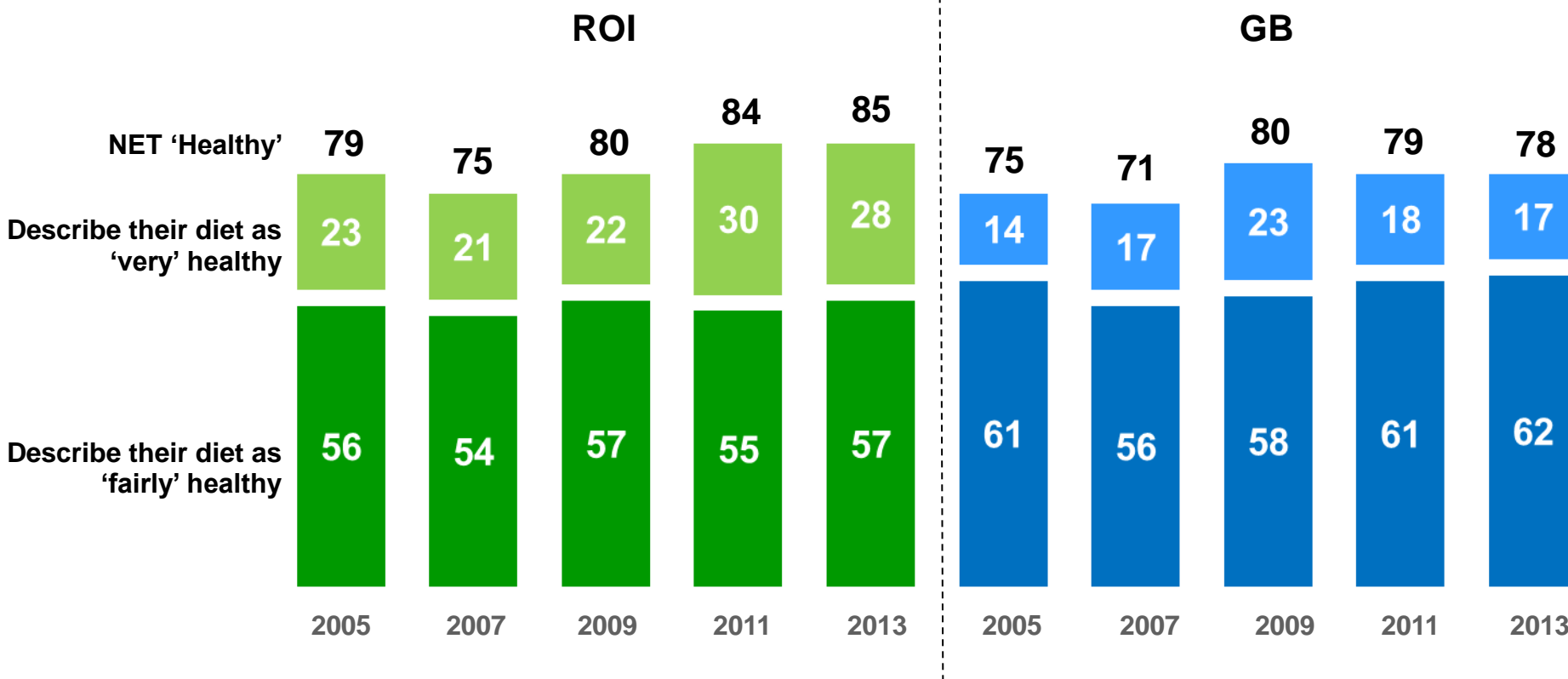
Health & Wellbeing



ROI perceives itself to be slightly healthier than GB and while ROI's levels of healthiness have been rising since 2007, GB seems to have stagnated somewhat.

61

Diet Perceptions in each country

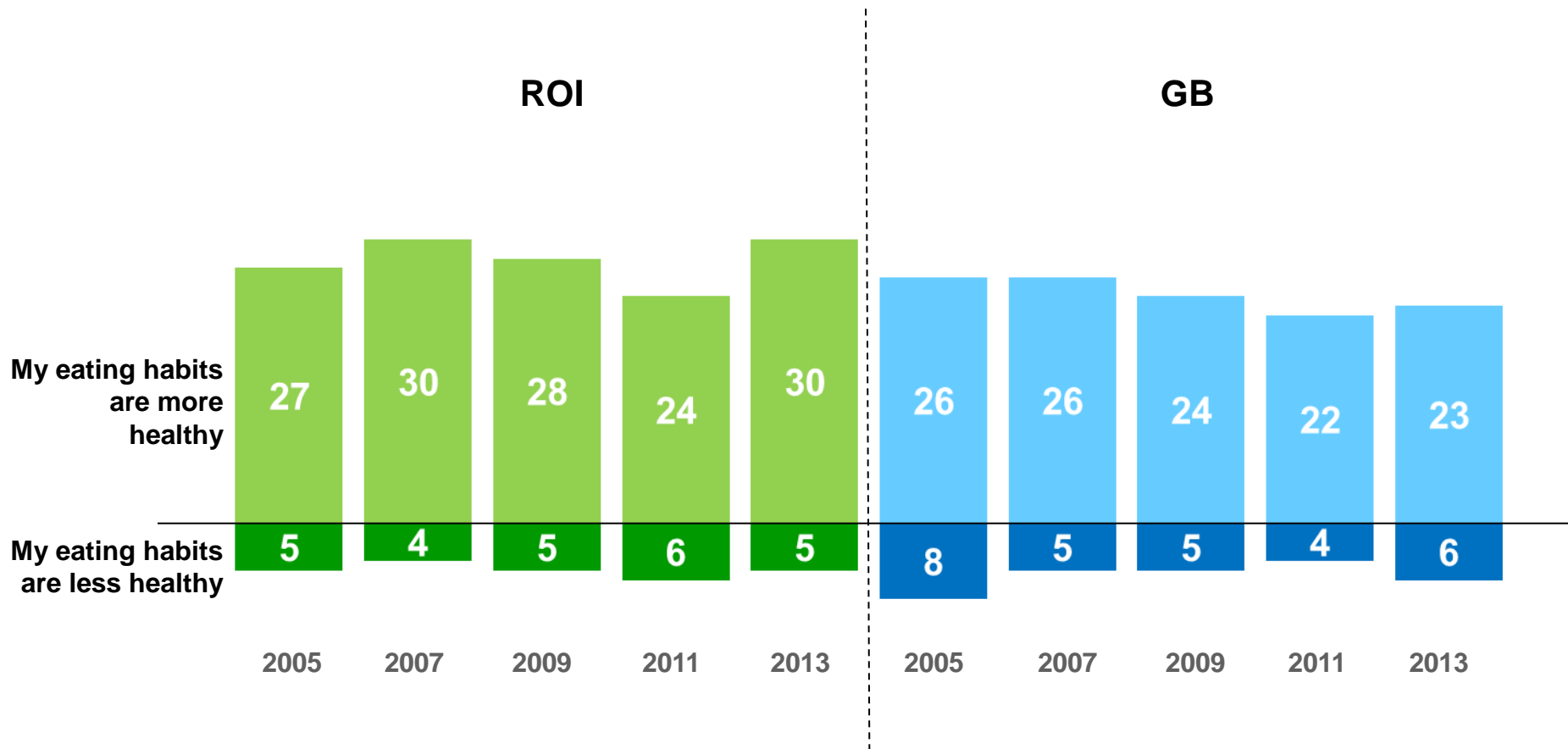


ROI claims to be the most healthy country across the PERIscope 2013 study. The Netherlands, GB, Sweden and Spain follow behind. Germany claims to be the least healthy.

In ROI, three in ten adults believe their eating habits to be more healthy than one year ago. In GB this is just over two in ten.

62

Changes in eating habits in last 12 months

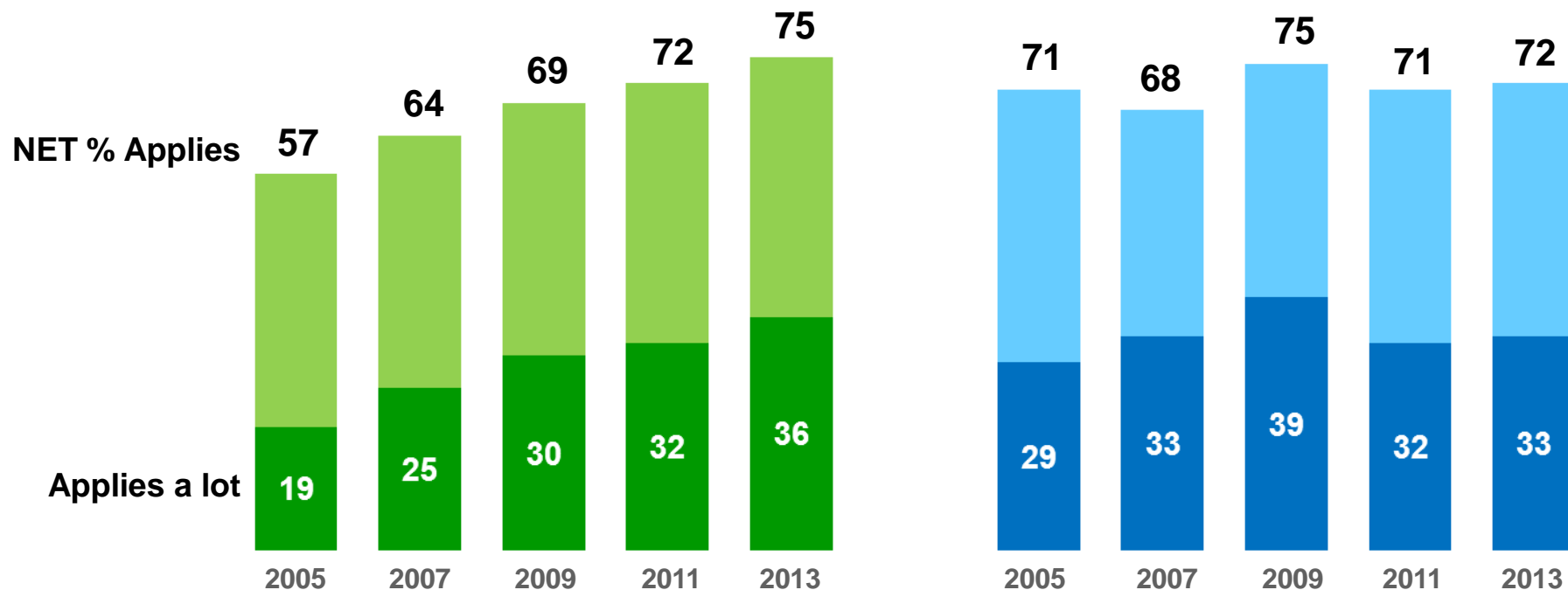


GB displays the lowest level of agreement across all the countries that its eating habits have become more healthy in the last 12 months.

It seems the 5 a day message is being adhered to by approximately the majority of adults in ROI and GB. Since 2005 ROI has consistently increased its fruit and veg intake.

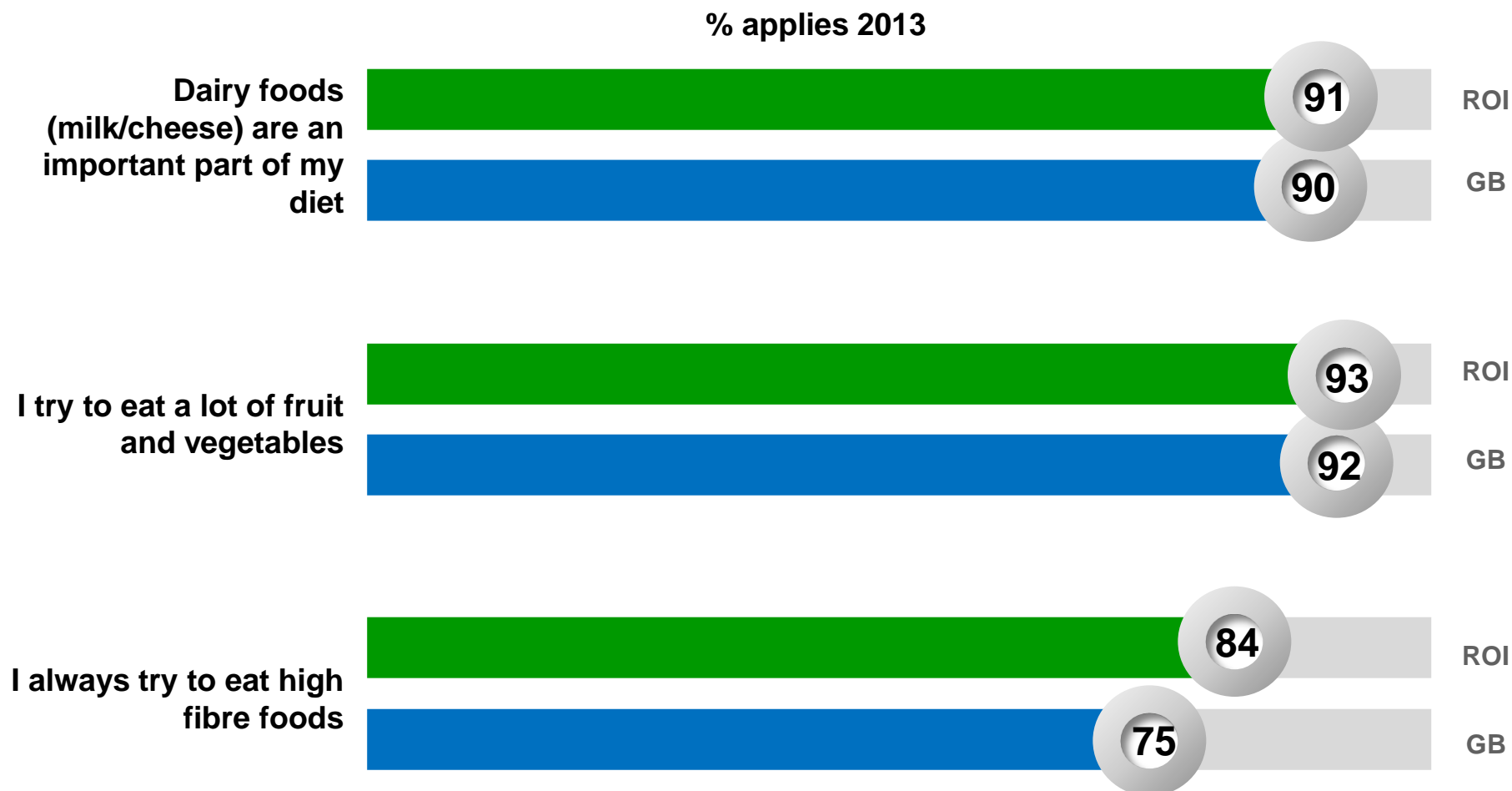
63

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



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.

Consumption of dairy and fruit and veg are very similar in ROI and GB. When it comes to high-fibre foods, however, ROI has a much higher tendency to consume them than GB. 64



ROI displays a slightly higher propensity to believe that health is influenced by eating properly and a slightly stronger endeavour to eat a balanced diet, compared to GB.

65

% applies 2013

**To be healthy it is
important to eat
properly**



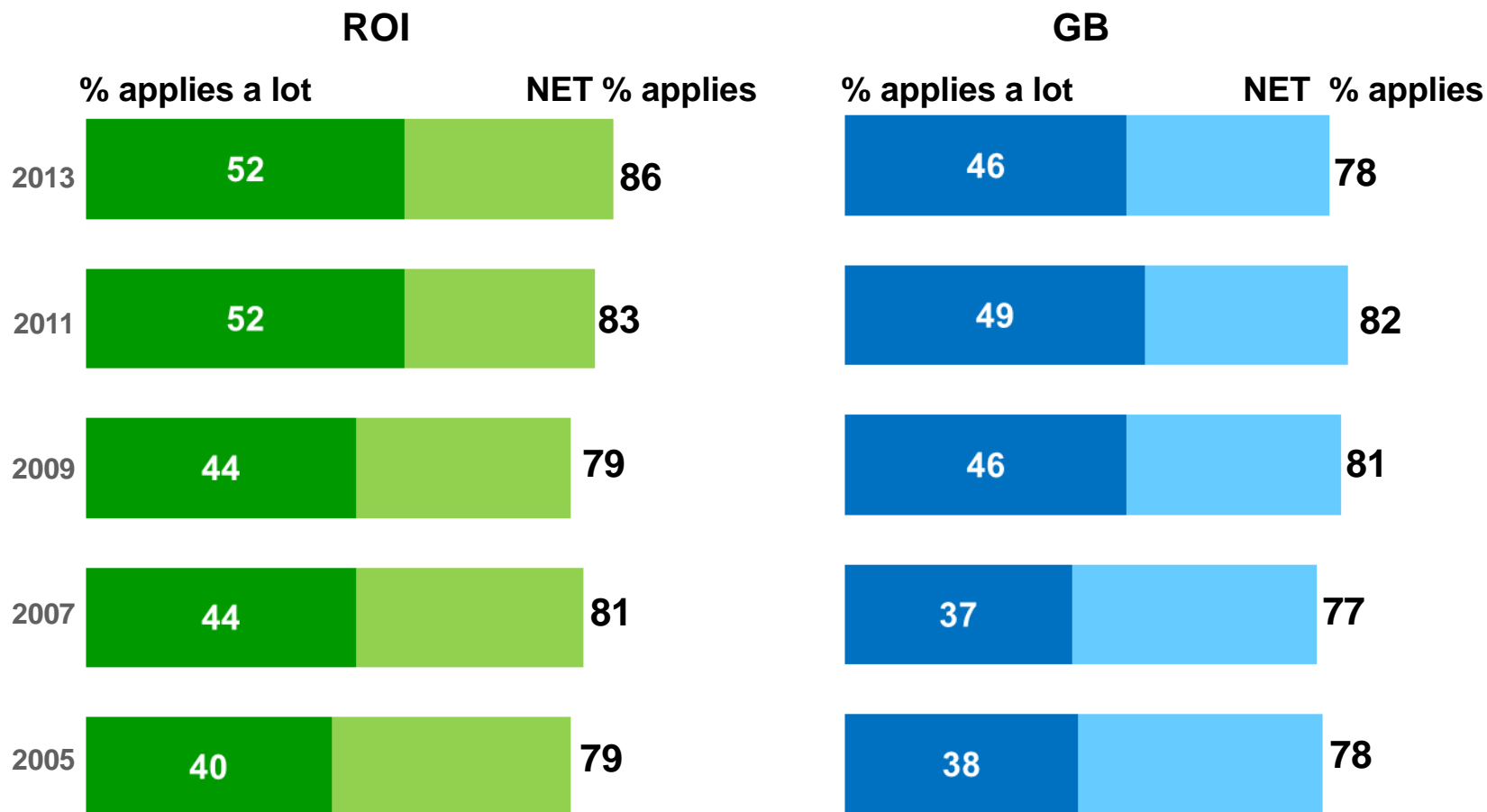
**I always try to eat a
balanced diet**



Endeavours to limit the amount of fast food that is consumed seem to be stronger in ROI than in GB. Efforts to limit fast food consumption have fallen slightly in GB.

66

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

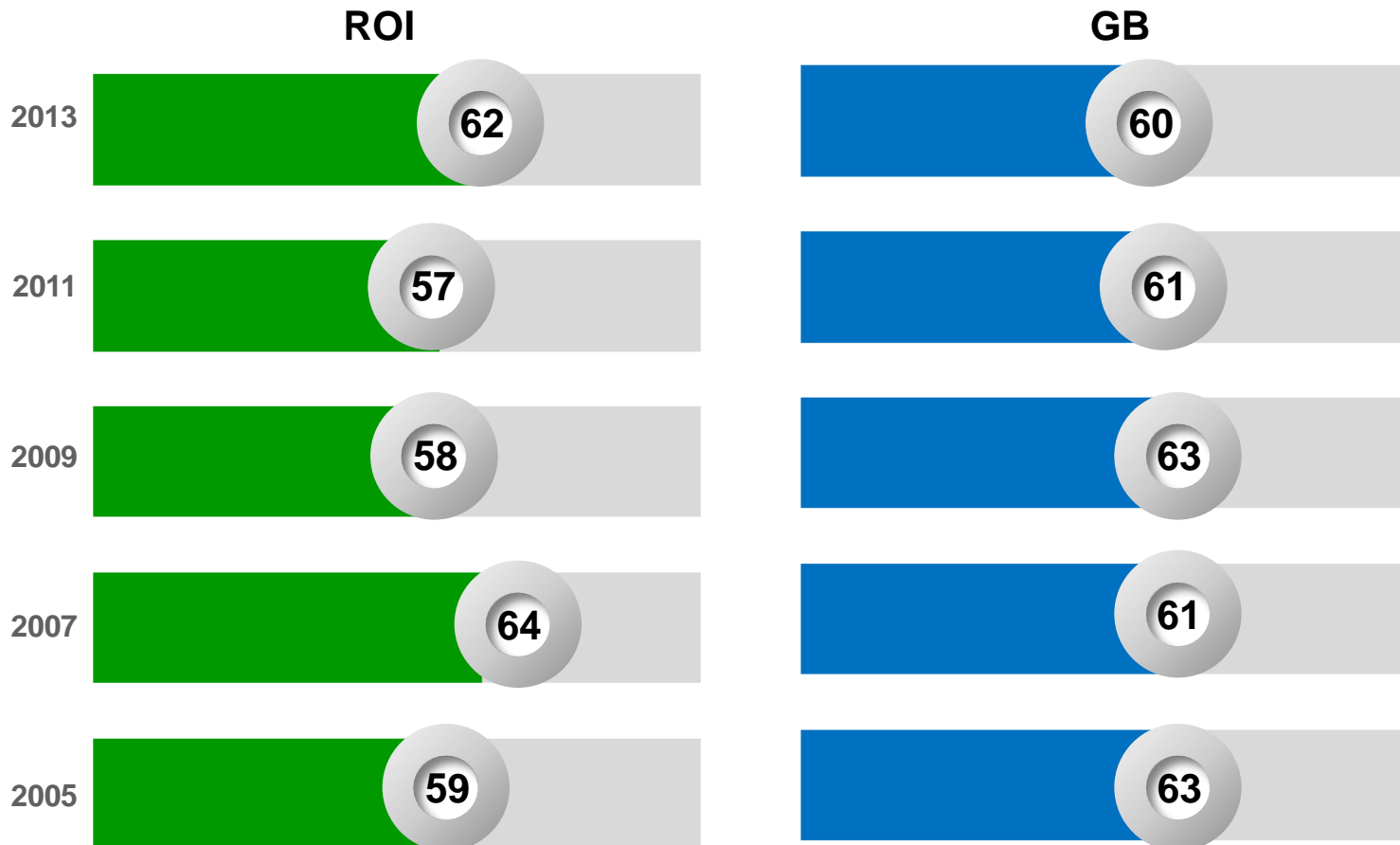


GB ranks the lowest on claimed efforts to limit fast food consumption. ROI ranks fifth of ten. Spain and Belgium seem to try to limit their consumption the most.

Similar proportions of people in ROI and GB look for low fat options when they are shopping. This attitude has advanced slightly in ROI while in GB it has been stable.

67

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

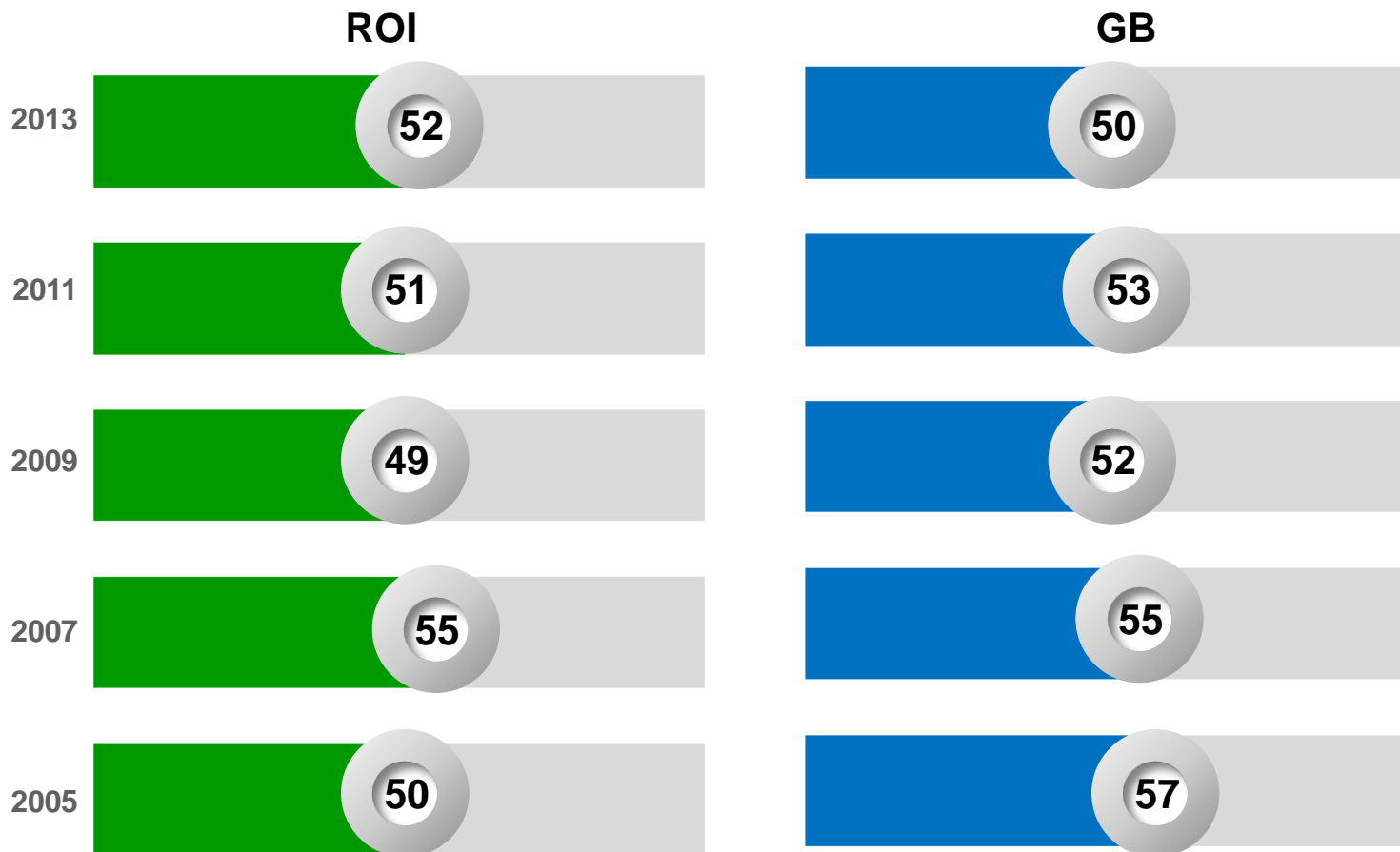


ROI and GB food decisions are not as driven by low fat considerations as countries like Spain (91%) and NZ (73%).

Calorie content in food carries the same importance in ROI and GB. Since 2007, concerns about calories have declined somewhat in both regions.

68

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

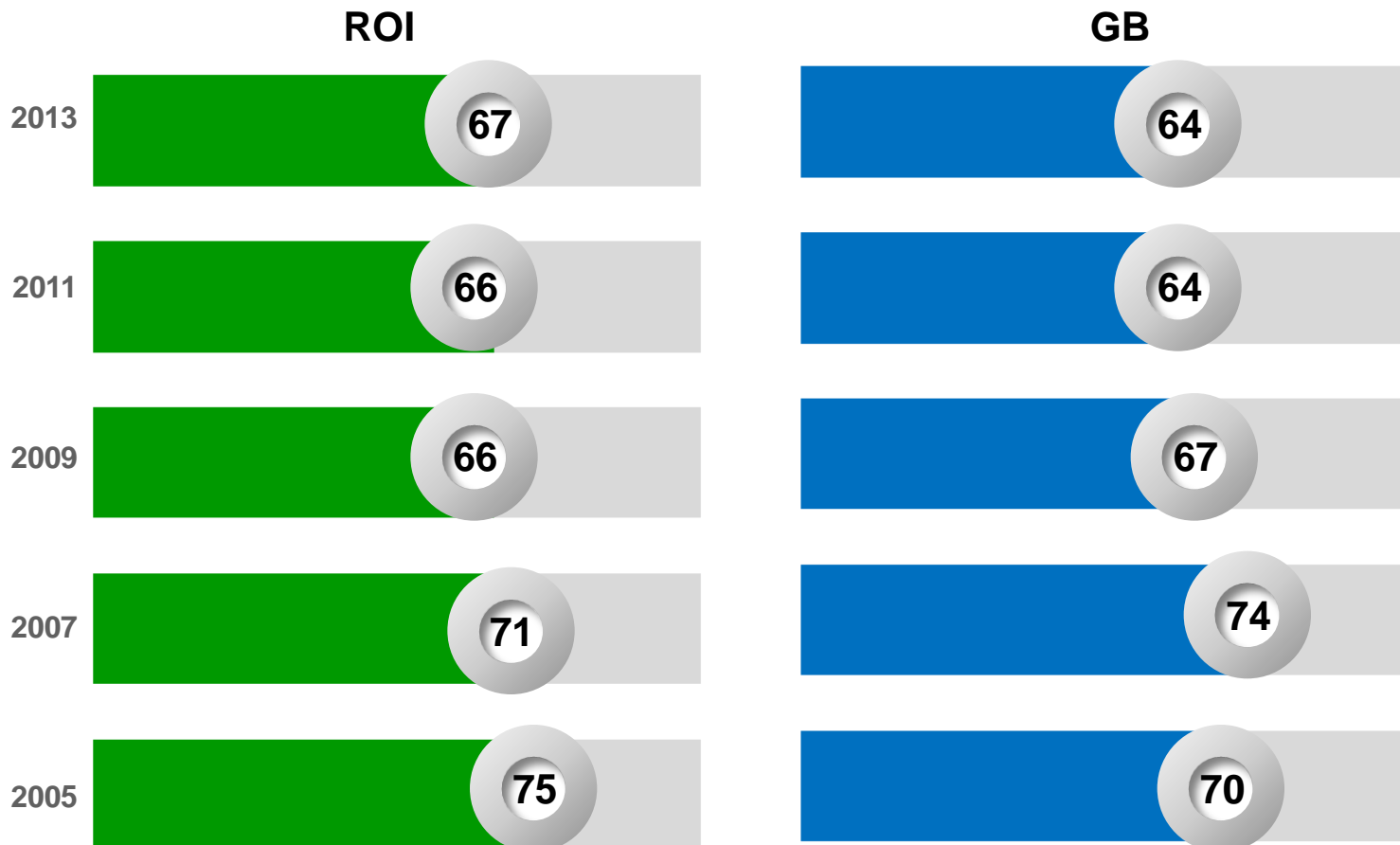


Spain think the most about the calories in what they eat (72%) while Germany thinks about it the least (42%). ROI & GB rank amongst the average.

Since 2007 the assumption that low fat equates to the healthy choice has declined in both regions. Despite this, the majority still believe that low fat equals healthy.

69

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

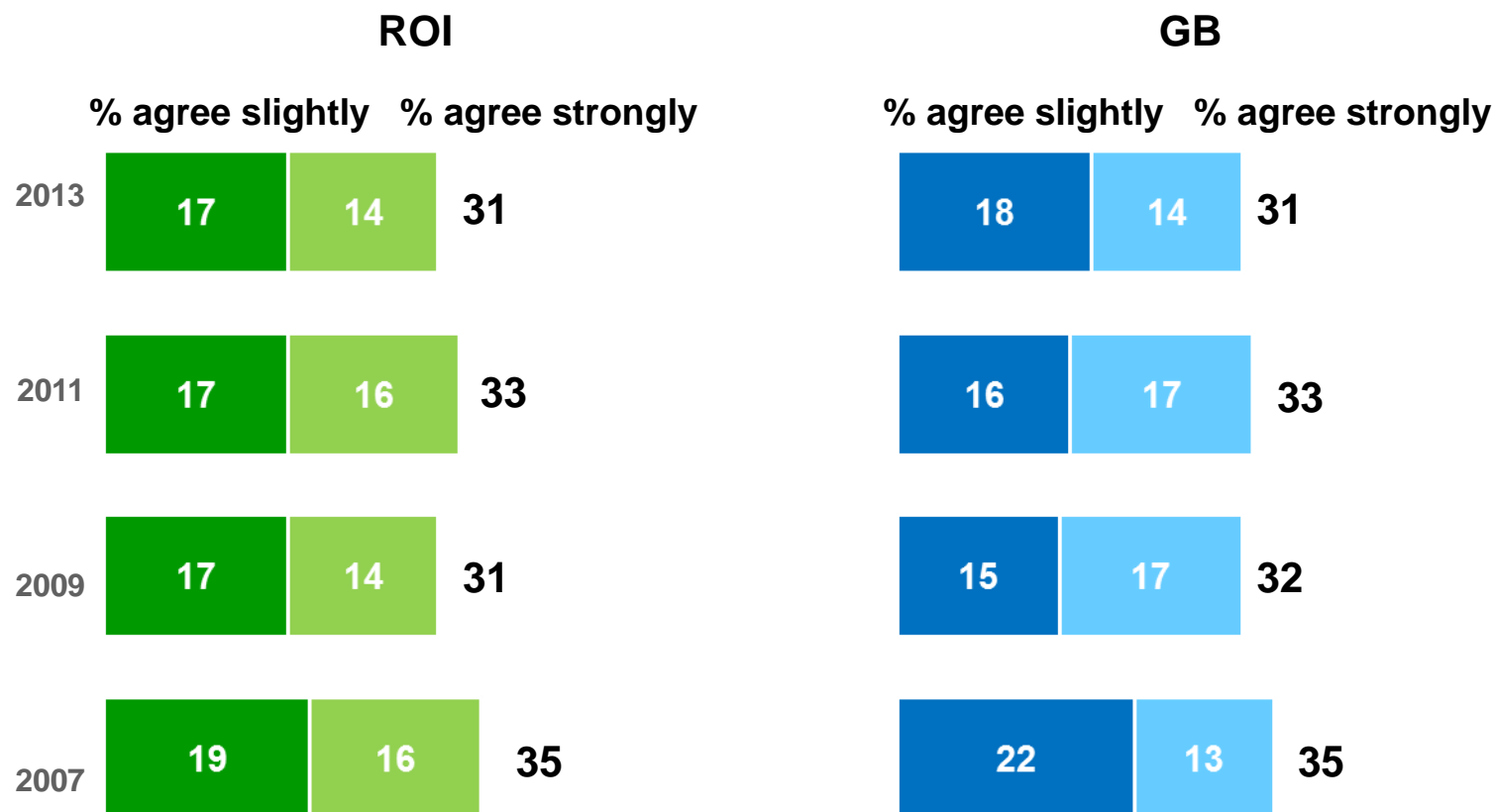


Spain (89%), followed somewhat further behind by ROI and GB, are the most likely to connect low fat to the healthy choice. This is least likely in Sweden (32%).

Concerns about childhood obesity are extremely consistent across ROI and GB.
Concerns about obesity have not shown any significant movement in recent years.

70

I am concerned about my children becoming obese

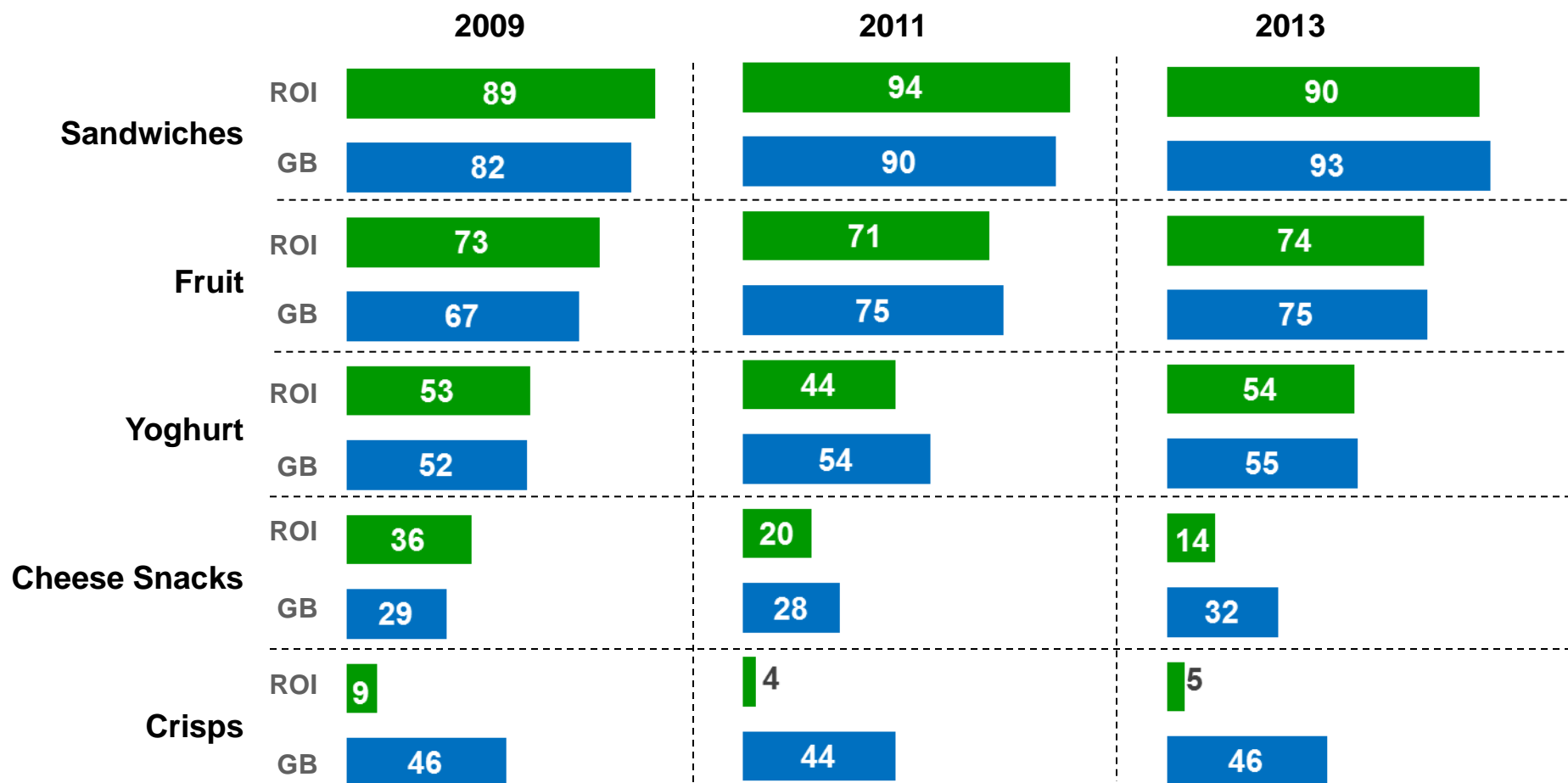


The highest level of concern about childhood obesity is present in Spain (78%).
ROI, GB, Germany and the Netherlands have the lowest concerns.

When it comes to lunchbox staples, ROI & GB display similar behaviours. However, kids in GB are far more likely to have cheese snacks and crisps in their lunchboxes.

71

Content of kids' lunchboxes

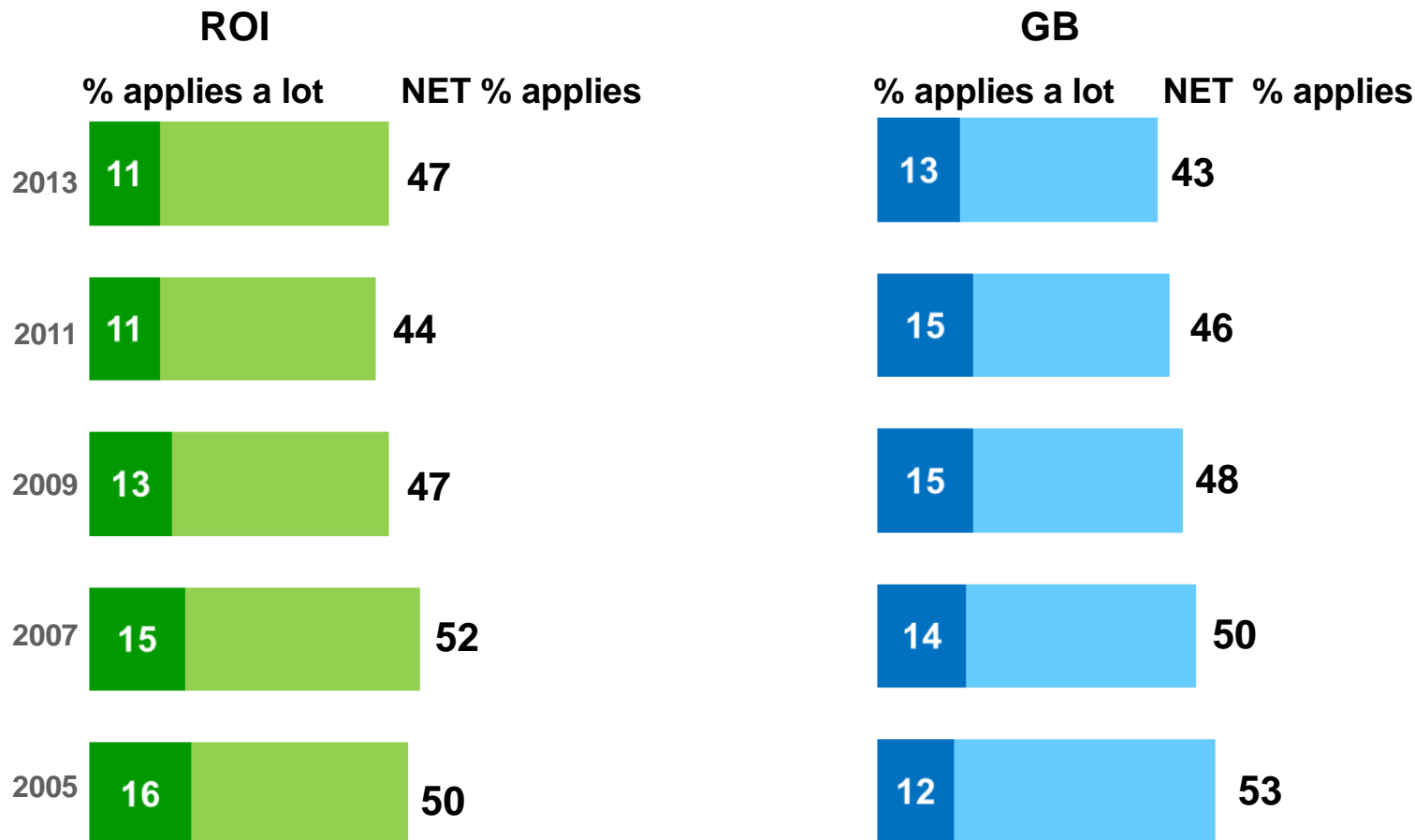


GB ranks behind the US only in terms of crisps and cheese snacks in children's lunchboxes. It ranks first for yoghurts while ROI ranks second.

Attitudes towards healthy food have improved somewhat in ROI and GB compared to 2005/2007. ROI remains slightly more negative than GB.

72

Choosing healthy food to eat is limiting and boring

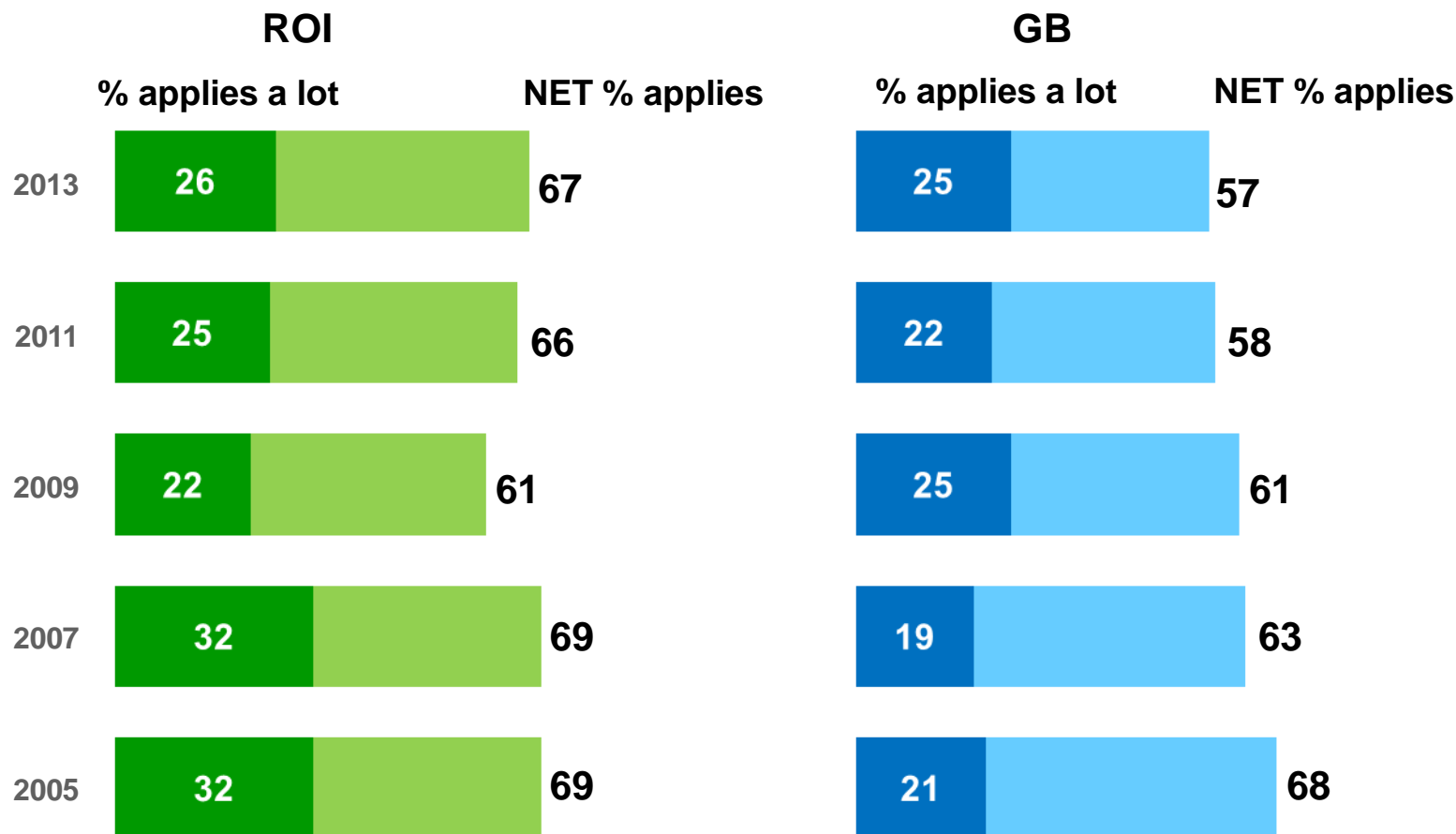


GB is most positive about healthy food because it displays the lowest level of agreement with the statement above. In contrast, ROI ranks in the top five most negative countries.

There has been a rising desire in ROI for assistance from manufacturers regarding healthy eating. This desire has been declining in GB and is currently lower than ROI.

73

I would like manufacturers to help me to eat healthy

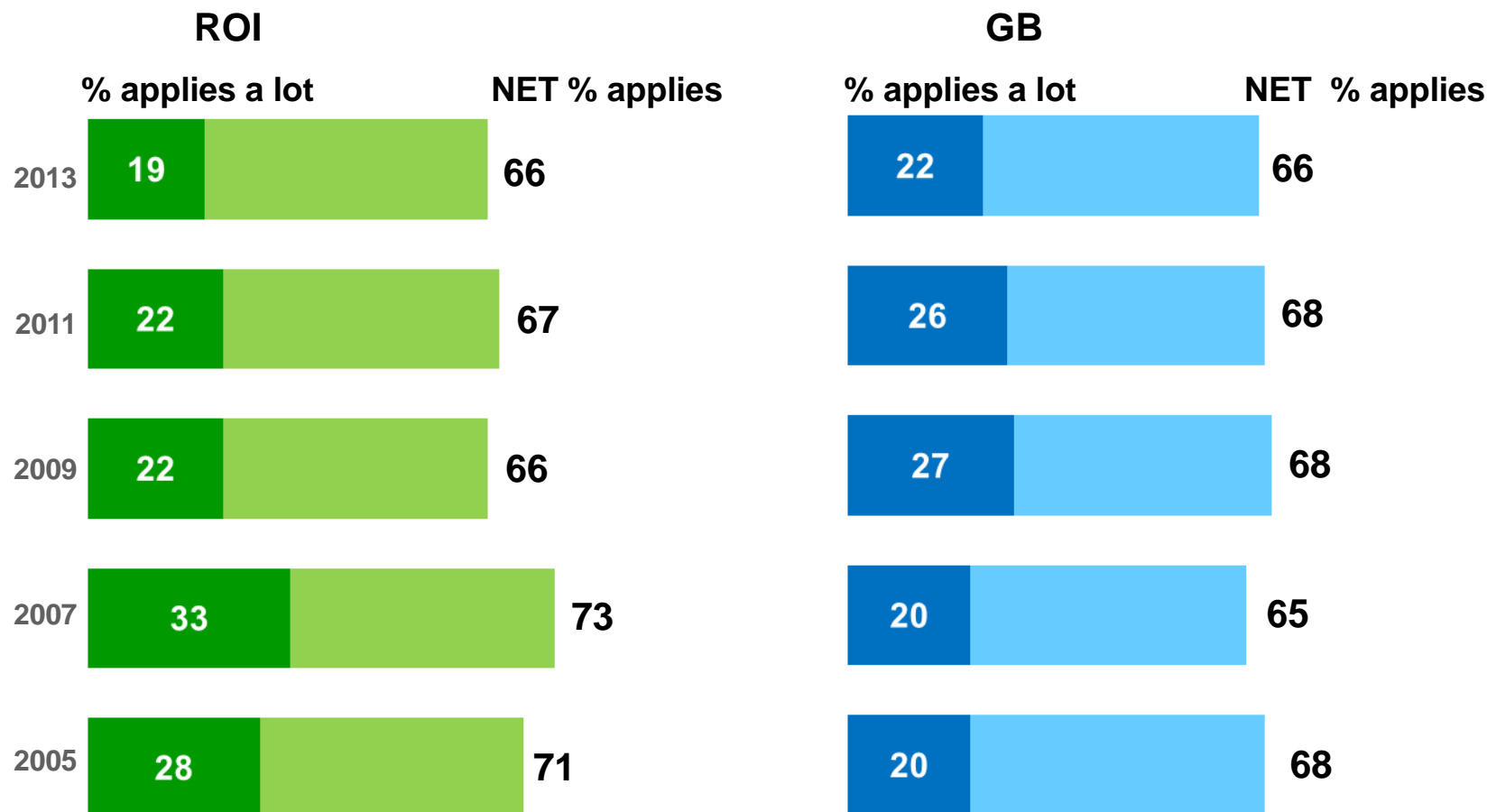


In the context of the PERIscope 2013 study, ROI and GB have the lowest desire for manufacturers to help them to be healthy. Spain and Germany have the highest desire.

ROI and GB display the exact same willingness to pay more for healthy products. Levels of willingness in both countries have not advanced in the last six years.

74

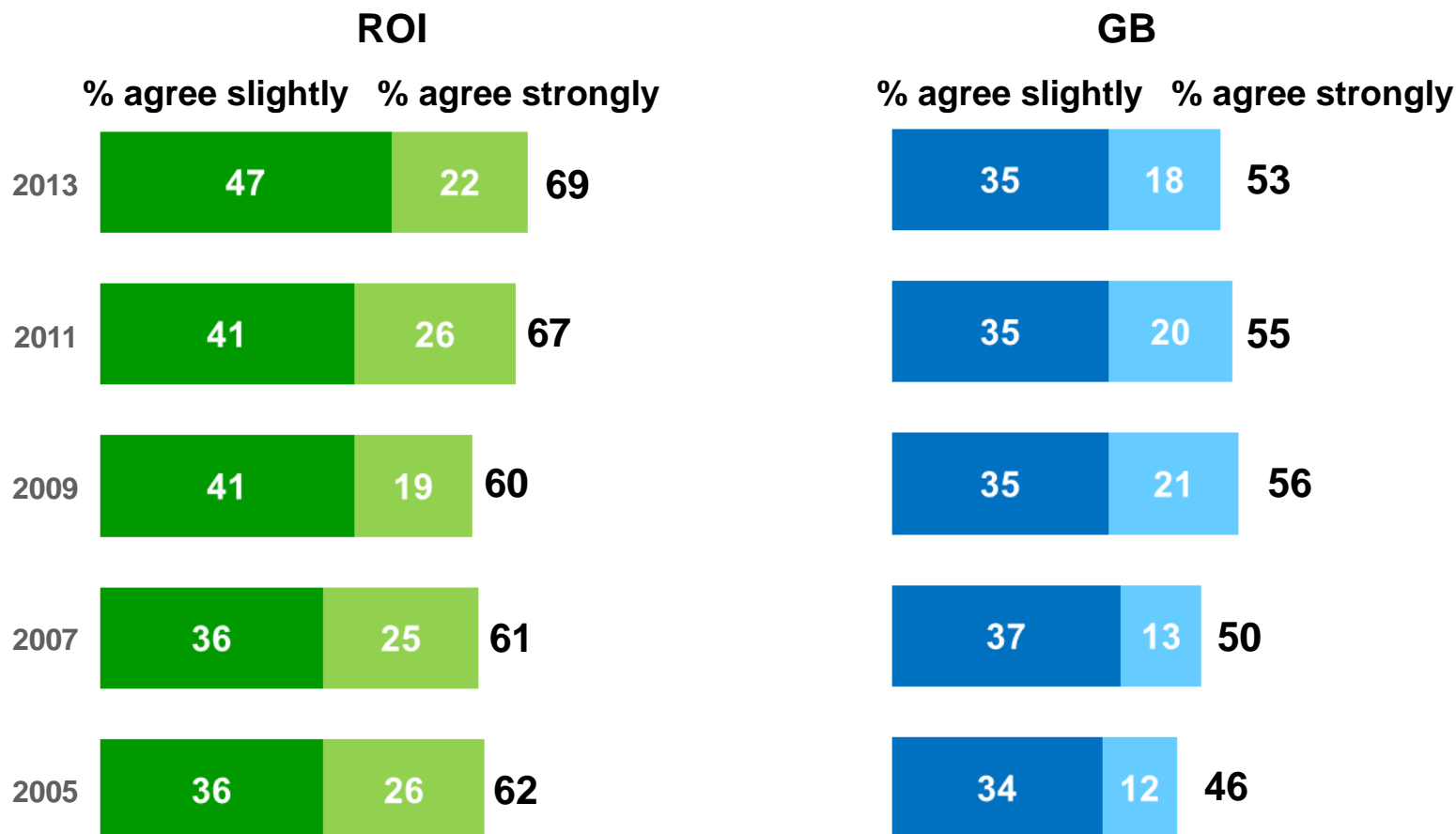
I am willing to pay more for healthy foods & beverages (as long as they taste good)



GB and ROI display the lowest levels of willingness to pay more for healthy food and beverages than any other country in the PERIscope 2013 study.

Taking control of one's life through the food they choose to eat is a concept that is more popular in ROI than in GB. In ROI, the concept has grown in popularity since 2009.⁷⁵

I eat healthy to take control of my life

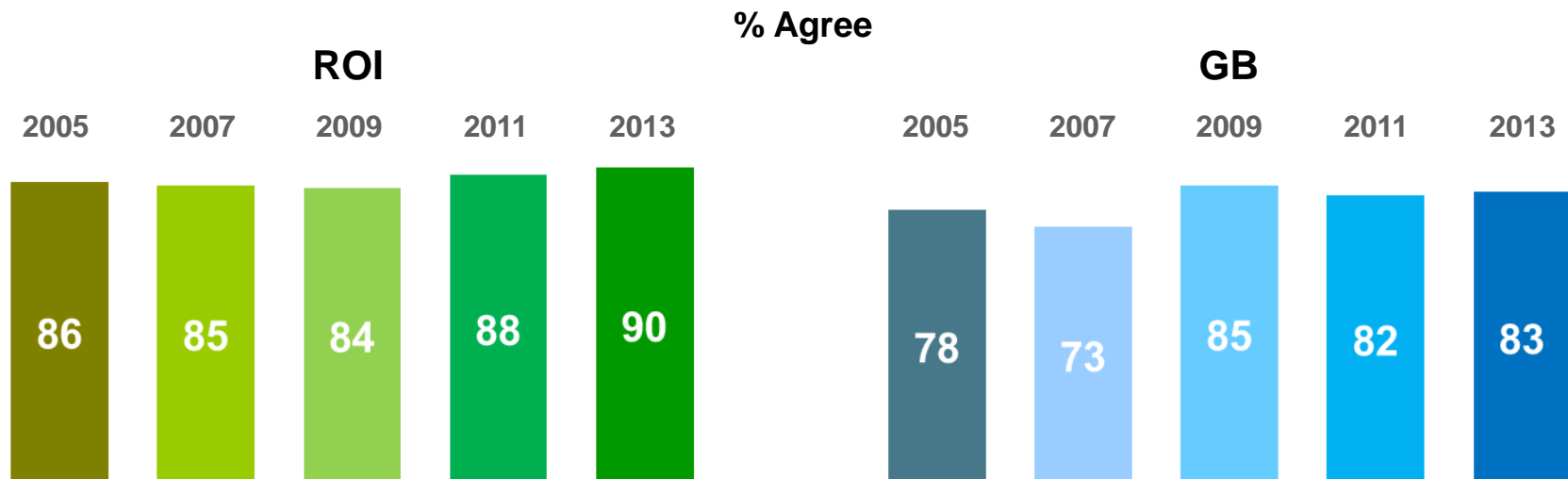


ROI and France display the highest level of agreement with the concept of eating to take control of one's life. GB and Sweden (50%) agree the least.

The Irish are much more likely than the British to believe in the benefits of a good diet. The association between mental health and diet have been rising in ROI since 2007.

76

A good diet can help mental health

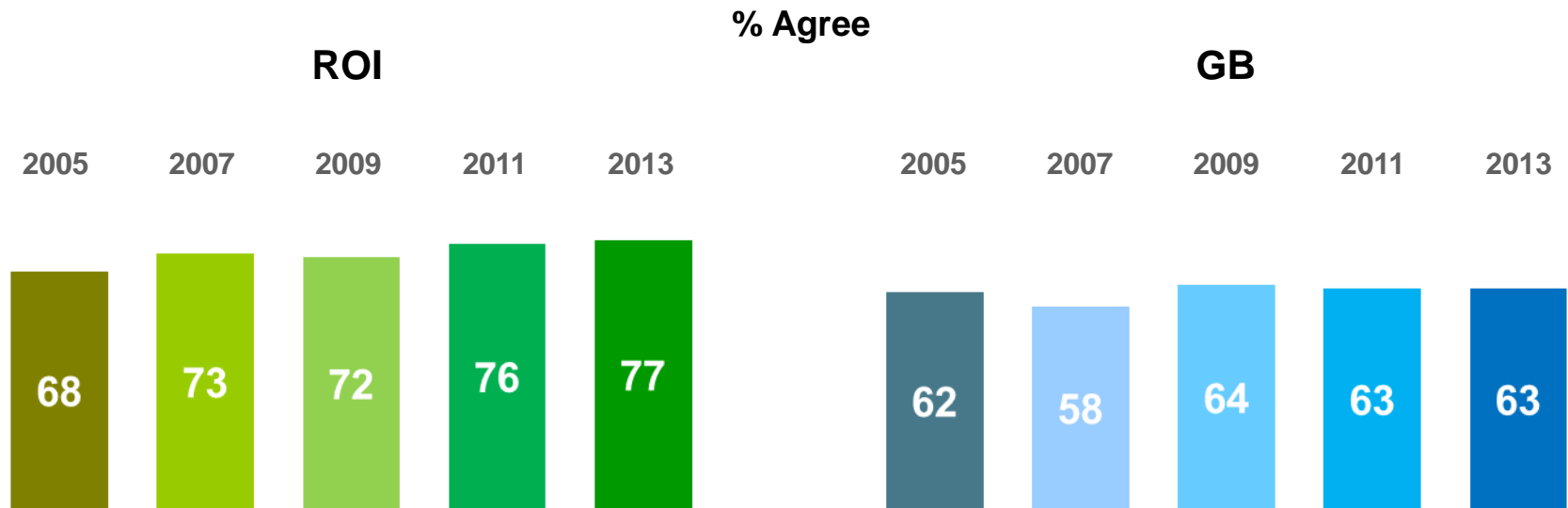


ROI has the highest level of agreement with the idea that a good diet can contribute positively to mental health. GB ranks joint fourth across the entire study.

The connection between what one eats and spiritual wellbeing is more credible in ROI than GB. Since 2005, support for this concept has grown in ROI and perpetuated in GB.

77

I eat to enhance mental alertness and spiritual wellbeing

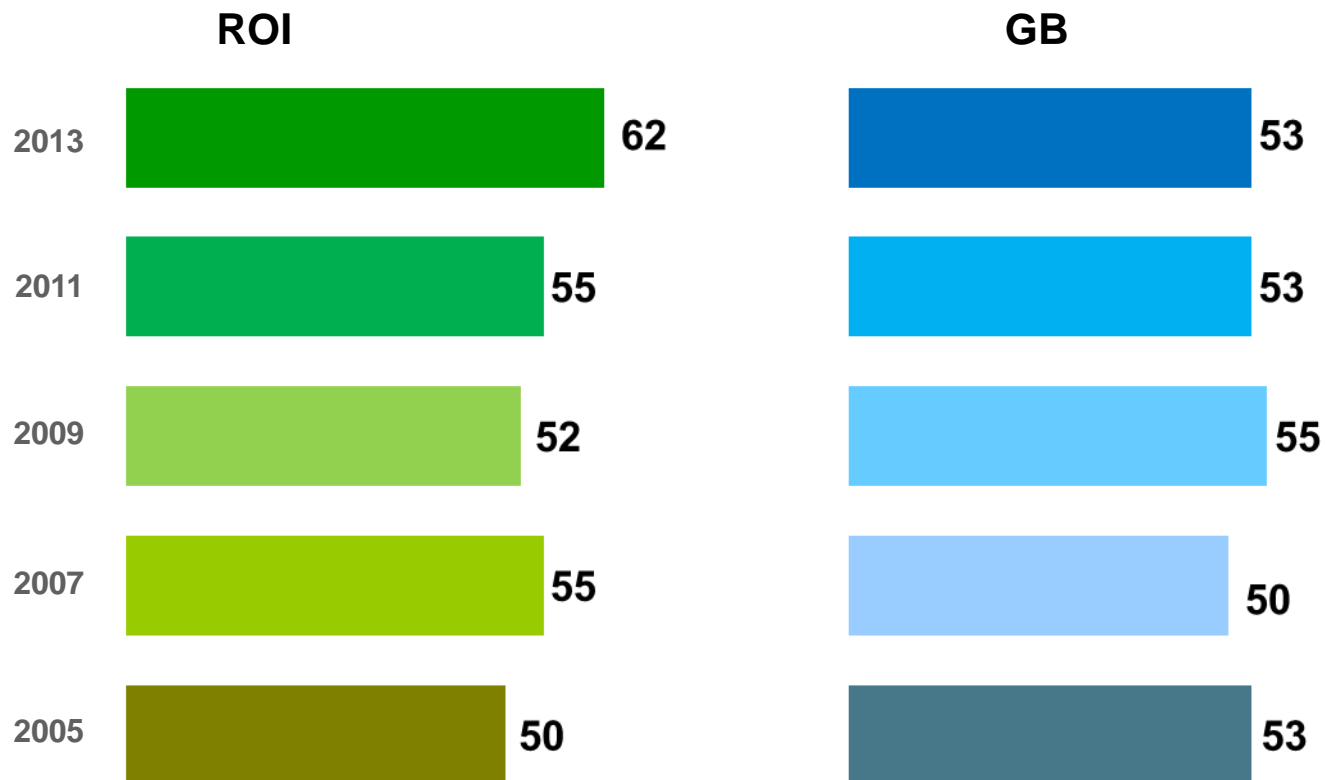


ROI also ranks highest in terms of agreeing that what one eats is important for mental wellbeing. The lowest level of agreement is evident in the Netherlands.

The process of checking nutritional information prior to purchase occurs more often in ROI than in GB. ROI has shown considerably more progress in this behaviour than GB.

78

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

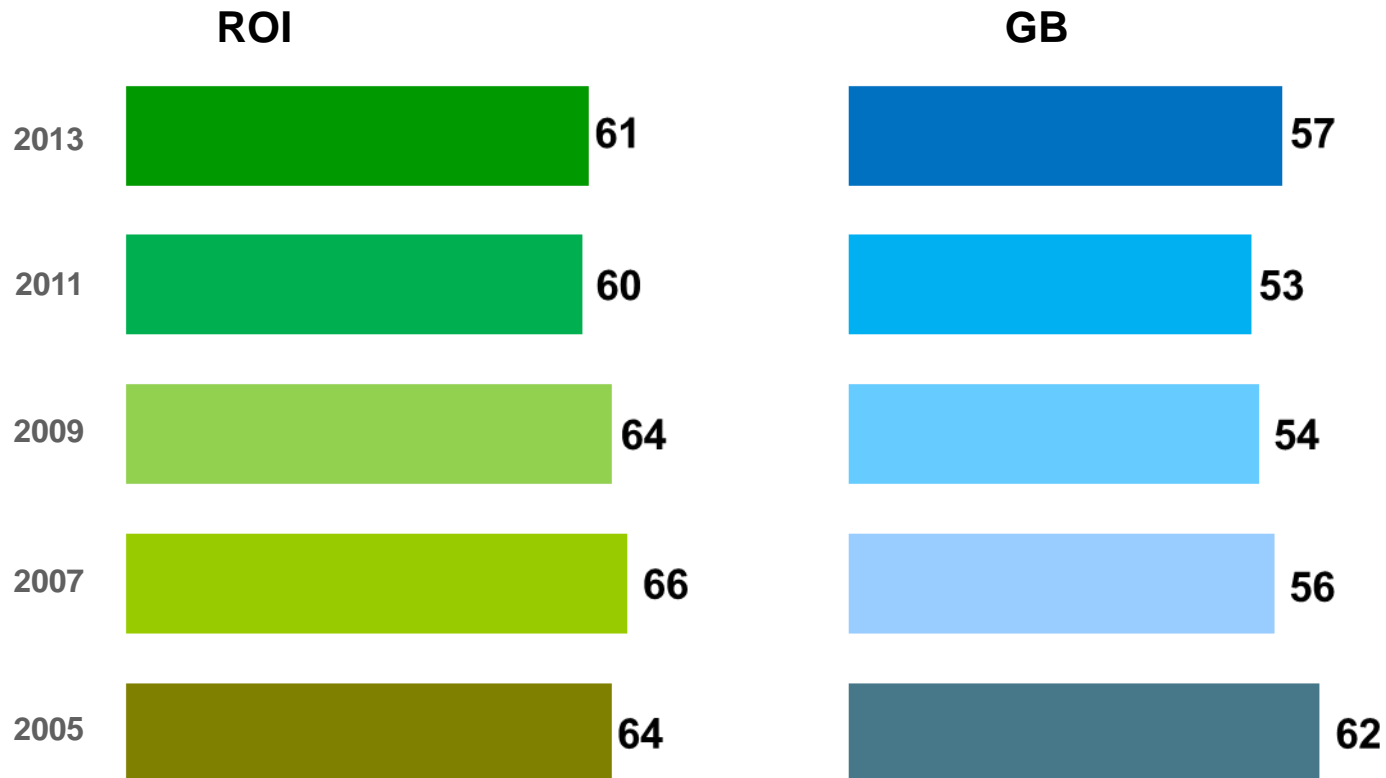


Adults in GB check the nutritional labelling on food the least of any other country in the study. ROI also ranks as one of the lowest. Spain and the US claim to check the most.

Difficulty experienced in understanding nutritional claims on packaging has declined. Yet, a considerable amount of people still struggle to understand this information.

79

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

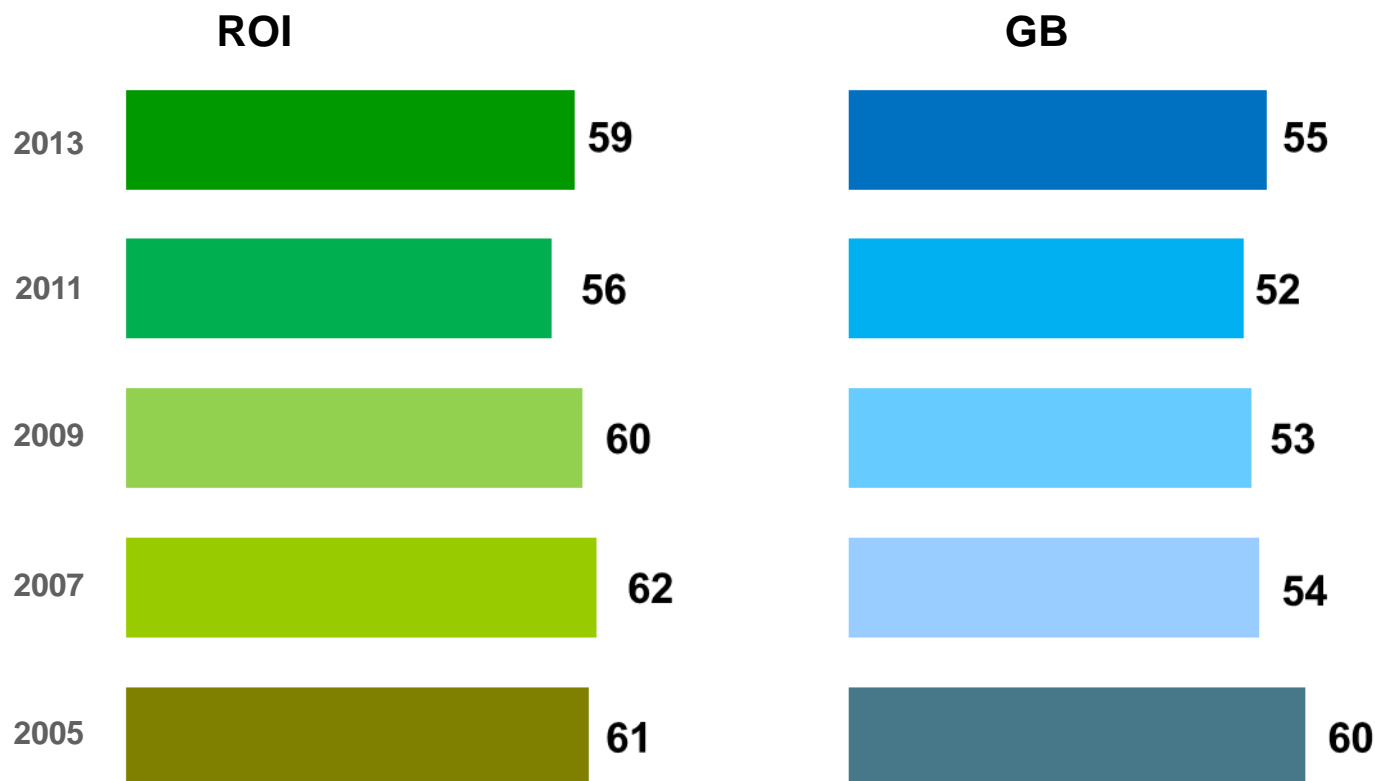


ROI and GB, as well the US, claim to have the least difficulty understanding nutritional claims on packaging. Spain claims to have the most difficulty.

Understanding general labelling on food also poses problems for a similar proportion of people in ROI and GB. Since 2005 improvements have been relatively negligible.

80

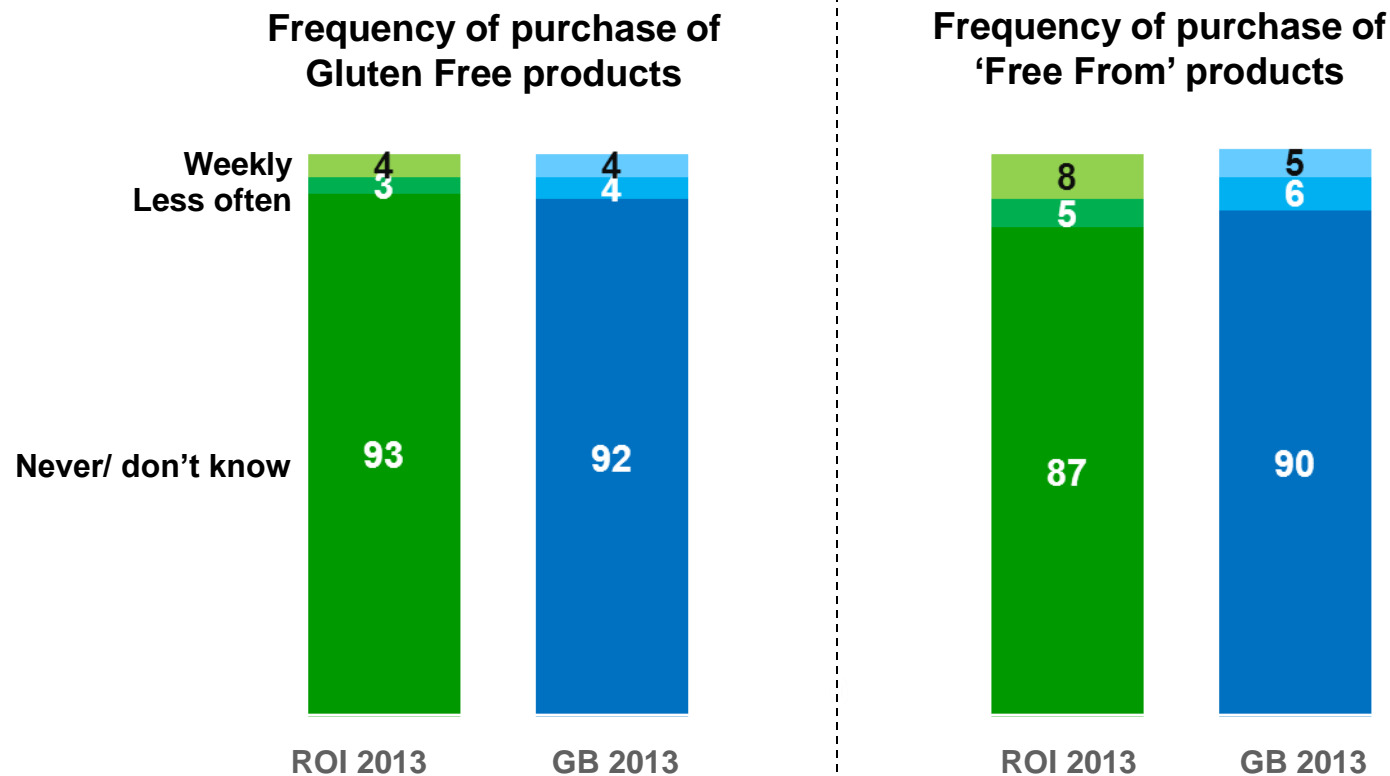
% applies that they 'often find it difficult to understand labelling on food'



ROI and GB again feature as two of the countries with the lowest level of difficulty when it comes to understanding labelling on food. The Spanish struggle the most.

Purchases of gluten free foods are similarly low in ROI and GB. Free From foods are slightly more popular, with both markets again displaying similarity in their behaviour.

81



Spain (27%) and the US (29%) have the highest level of gluten free purchases. ROI and GB have the lowest. 'Free From' is most popular in Spain and least popular in ROI and GB.

TAKEAWAYS



1

Connect with skill sets

- GB is more competent and positive about cooking than ROI. But, ROI is making consistent progress.
- ROI slightly ahead of GB for scratch cooking, yet levels are low compared to others.
- Both countries have basic need for convenient options but these do not dominate food behaviours.
- Food products need to connect with skills and gently stretch skills to build confidence and encourage learning/ experimentation.



#2

Build fun and passion

- ROI & GB considerably behind counterparts for fun and passion about cooking – yet there are signs that fun is growing.
- Momentum needs to be built.
- Potential to enhance through access to new products/ new ideas/ new formats/ new means to experiment.
- Promote positivity and engagement will improve.



#3

Foster new experiences

- ROI's attendance at cookery classes displays willingness to develop abilities further.
- Baking skills in both regions quite similar but stagnant.
- Use of technology to inspire is limited.
- Opportunity to offer new food experiences through products and services that encourage one to cook something new, to bake, to entertain, to spend quality family time together, to engage with others through food.



#4

Deliver understandable health

- High perceptions of healthiness and low demand for help from manufacturers.
- Difficulties present in understanding nutritional information and claims.
- Astute appreciation of link between diet and health/ wellbeing, particularly in ROI.
- Lowest willingness to pay more for healthy food.
- Fine-tuning healthy choices & persuading of health benefits may expand spend on healthy products.



#5

Give simple signposts

- ROI and GB respond better to information that requires minimal effort to digest (i.e. low fat / price savings/ quick to cook).
- Less responsive to intangible concepts (sustainability/ 'the environment')
- Food health claims need to be simple, visible, measureable, uniform and meaningful.
- Other food property claims (safety/ quality/ origin) need to be relevant and emotive.



#6

Connect to what matters

- The story behind food products counts more in ROI than in GB as ROI places much more emphasis on food transparency, food origin and food quality.
- Knowing more equates to more faith and better responsiveness to certain food offerings (in ROI).
- Constructing product offering based on a 'story' as a fundamental component will encourage purchases (in ROI).



#7

Be aware of value seeking shoppers

- Price and value drive shopping behaviours.
- Considerations of quality matters more in ROI than in GB.
- High level of involvement with grocery shopping articulated through willingness to bargain hunt.
- Readiness to shop impulsively also present.
- Propensity to respond to information based on simple savings messages will appeal.



PERIscope2013



Irish & British

Consumers & Their Food

