

# PERIscope2013



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 Spain.
- 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)

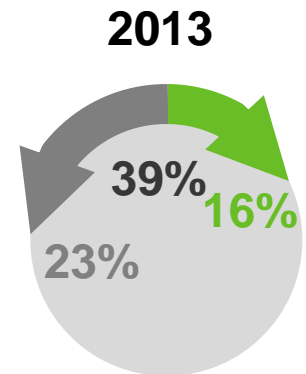
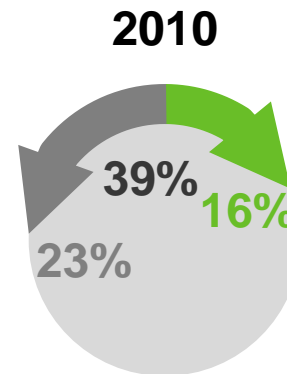
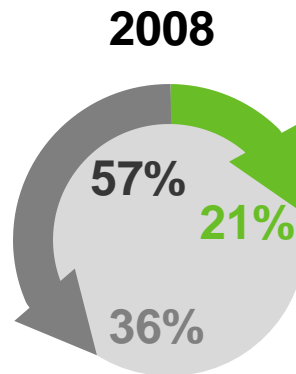
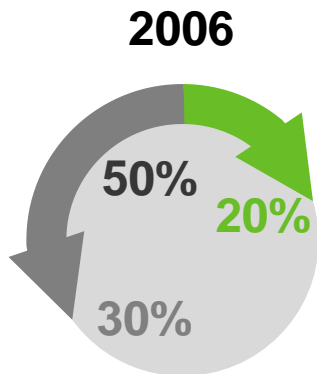
# A Foodie World



The positivity surrounding cooking, from both a fun and passion perspective, has declined substantially in Spain since 2008.

4

 **Good Fun**     **A Passion**

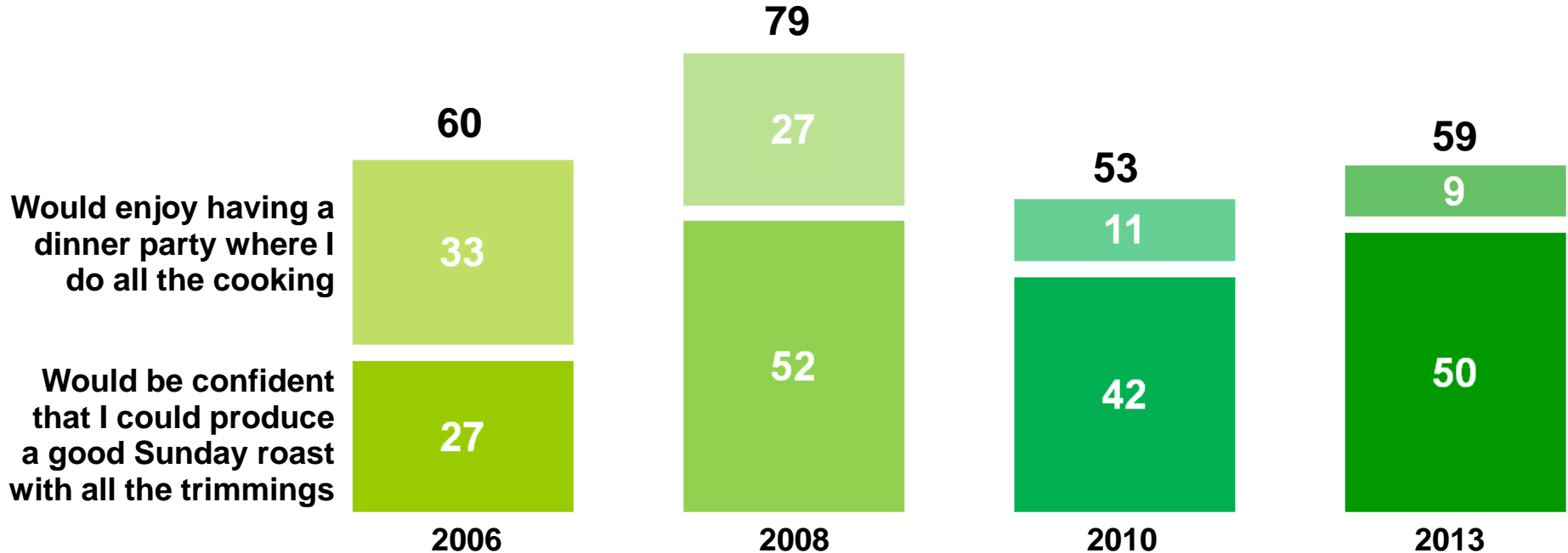


When it comes to cooking, the Spanish rank as the least positive country in the PERIscope 2013 study. It is also the country that has the least amount of fun when cooking food.

Levels of cooking expertise in Spain have declined since 2008. Dinner party hosting in particular has seen a dramatic drop from over one quarter to less than one in ten.

5

### Level of cooking expertise

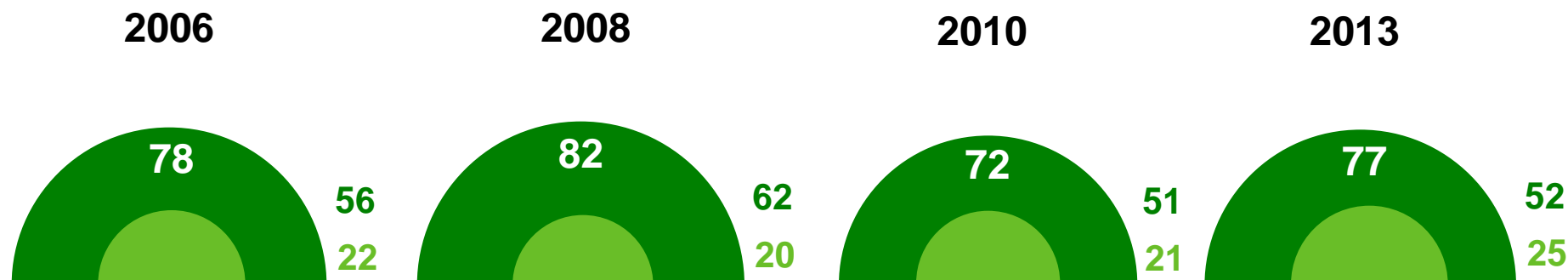


On the basis of dinner party hosting and ability to prepare a meal with all the trimmings, the Netherlands, Spain and ROI rank the lowest.

The proportion of Spanish adults cooking meals from scratch on a daily/ weekly basis has improved since the last wave of research.

6

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

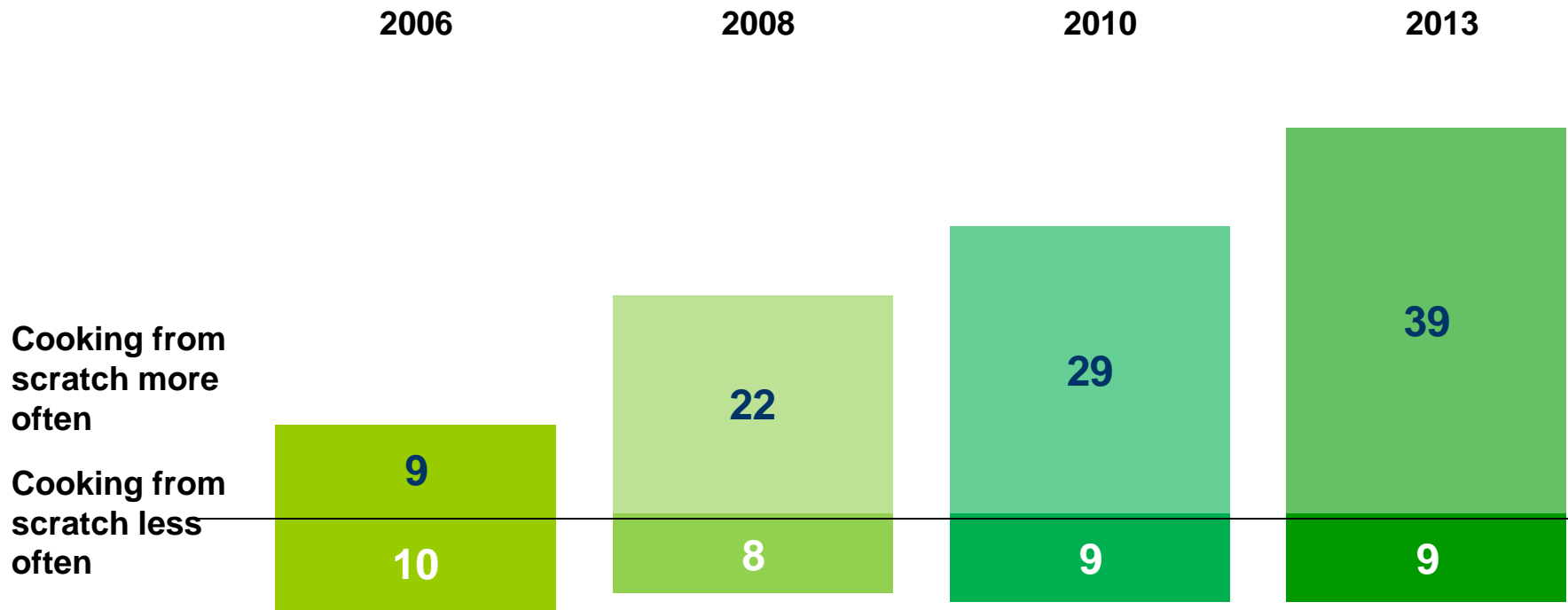


Claims regarding daily scratch cooking activities place Spain in first position.

The percentage of Spanish adults who are claiming to cook from scratch more often than before has dramatically increased since 2006.

7

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

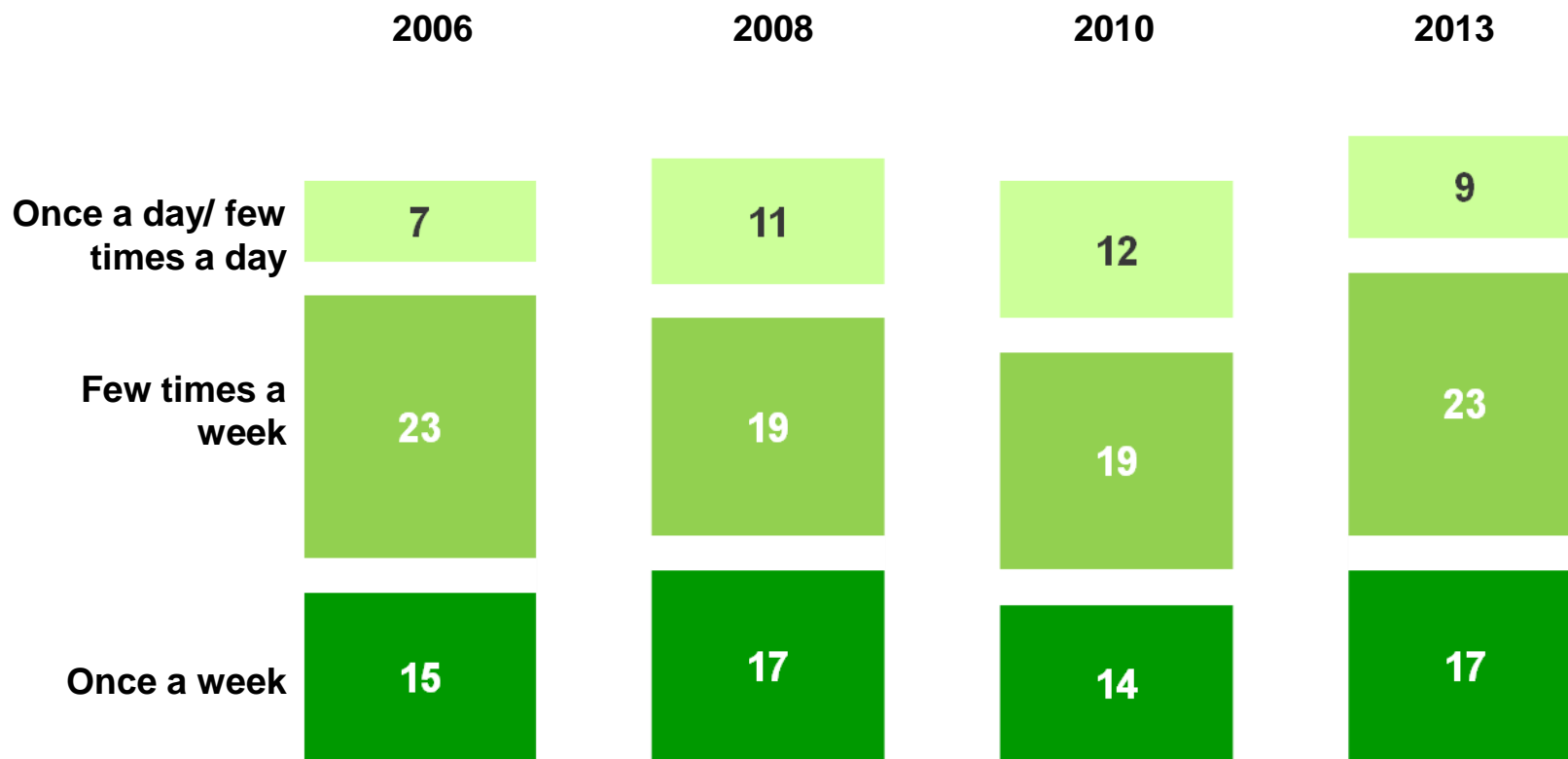


Compared to all other countries in the PERIscope 2013 study, the Spanish have increased their scratch cooking the most.

Compared to 2006, usage of ready prepared ingredients has not altered considerably in Spain, though usage has increased slightly in the last three years.

8

### Use of ready prepared ingredients



Usage of ready prepared ingredients on a daily/ weekly basis is highest in the US, GB and NZ. Spain ranks sixth.



Taking cooking classes in Spain has shown a marginal increase in the past three years, as has the proportion of people entertaining at home more often than before . 9

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

**2013**

**11**

**2010**

**9**

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

**35**

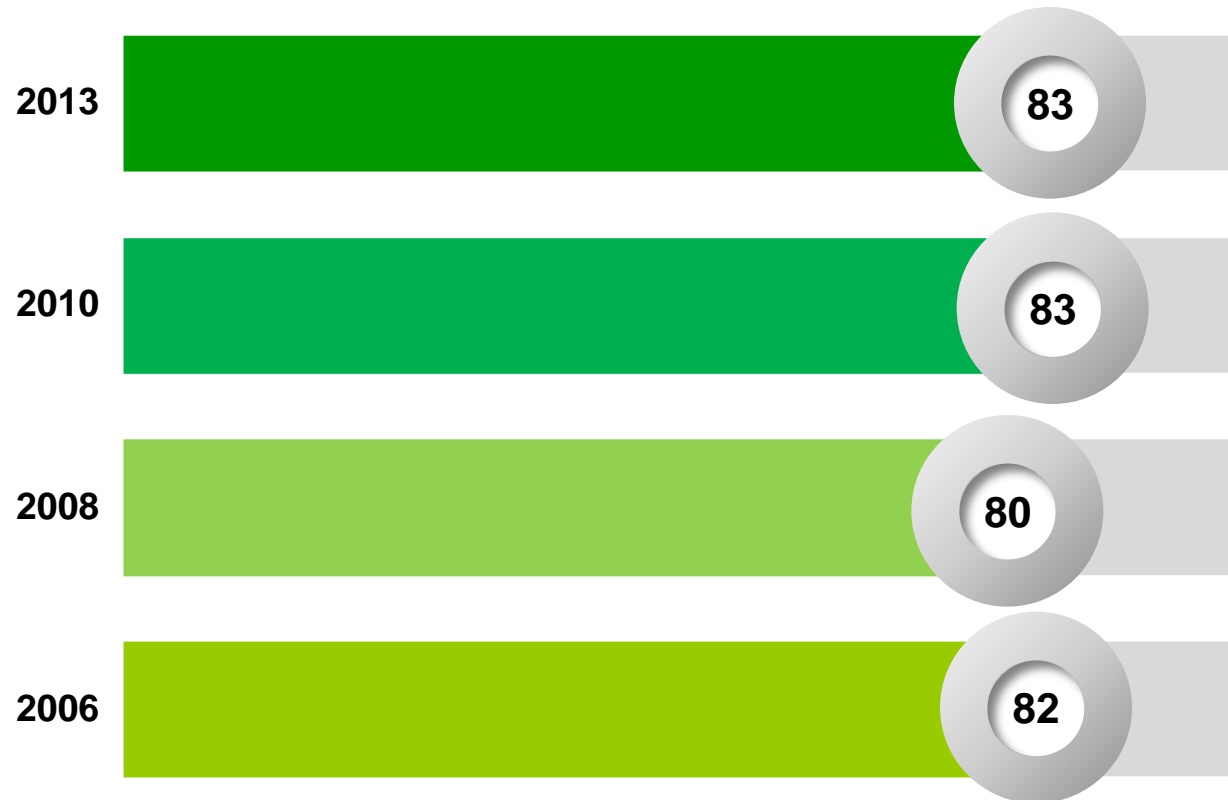
**29**

ROI and Spain are the highest attenders of cooking classes. When it comes to entertaining at home more often, Spain ranks fourth, behind the Netherlands, France and Germany.

The enjoyment obtained from cooking a great meal has remained steady in Spain over the past eight years.

10

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



Compared to other countries in the PERIscope 2013 study, Spain ranks third, behind NZ and Germany, for enjoyment experienced as a result of creating a great meal.

In Spain, ownership of both food processors and woks have experienced very little change since 2008.

11



Spain has one of the lowest ownership levels of a food processor across the PERIscope 2013 study. It also has the lowest ownership of a wok compared to all other countries.

There is a strong preference in Spain for foods that are neither time consuming to prepare or cook. Demand for less preparation time has increased somewhat.

12

%  
Applies

2006

2008

2010

2013

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

84

83

89

88

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

87

76

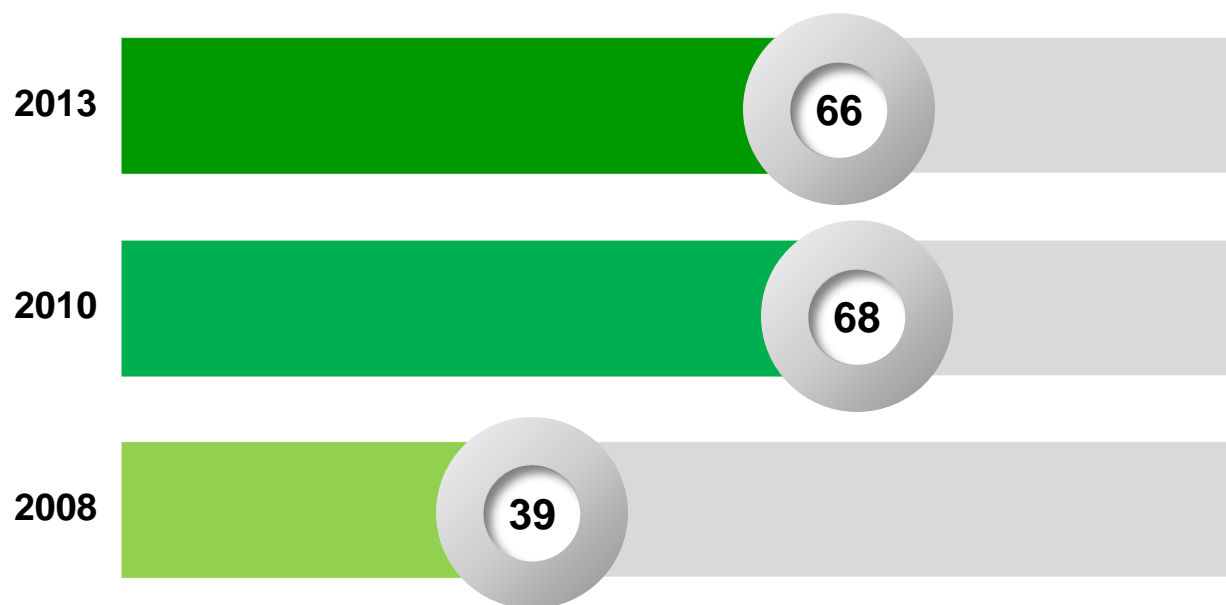
83

81

Alongside the US, Spain ranks highest in terms of its tendency to choose food that is easy to prepare and quick to cook.

Use of ready to eat foods in Spanish households reached an all time high in 2010. Since then it has fallen marginally, though still represents two thirds of Spanish adults. 13

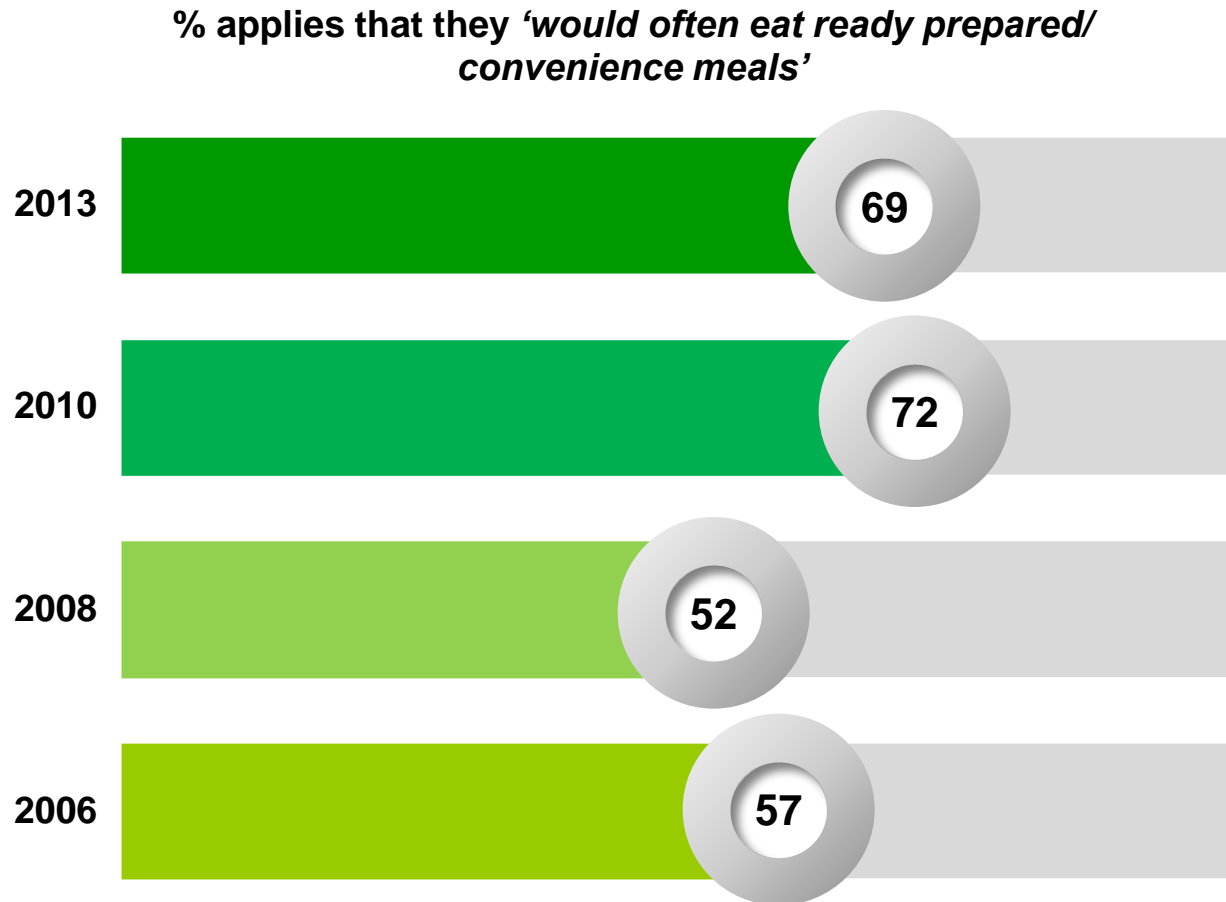
**% applies 'we use a lot of ready to eat foods in our household'**



Spain and the US rank as the highest countries when it comes to claims that ready to eat foods are used a lot in their households.

Compared to 2008, those claiming to often eat convenience meals in Spain has increased considerably.

14

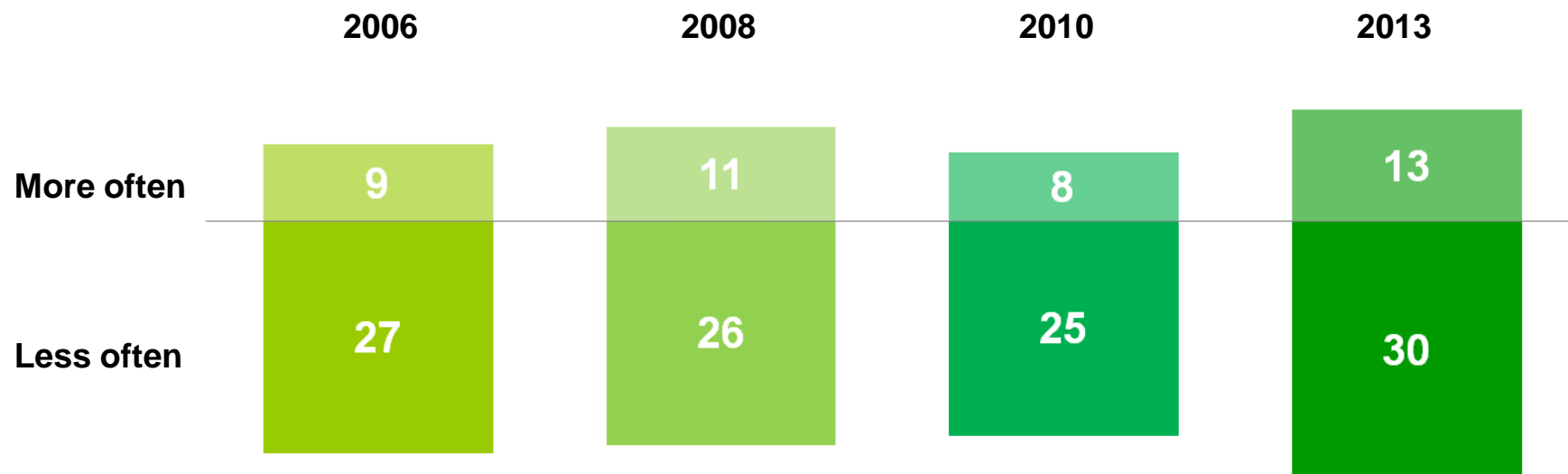


Spain ranks just behind the US, in second place, for the percentage of people who would often eat ready prepared/ convenience meals.

Despite evidence of high usage of convenience meals in Spain, the proportion claiming to eat convenience meals less often continues to rise.

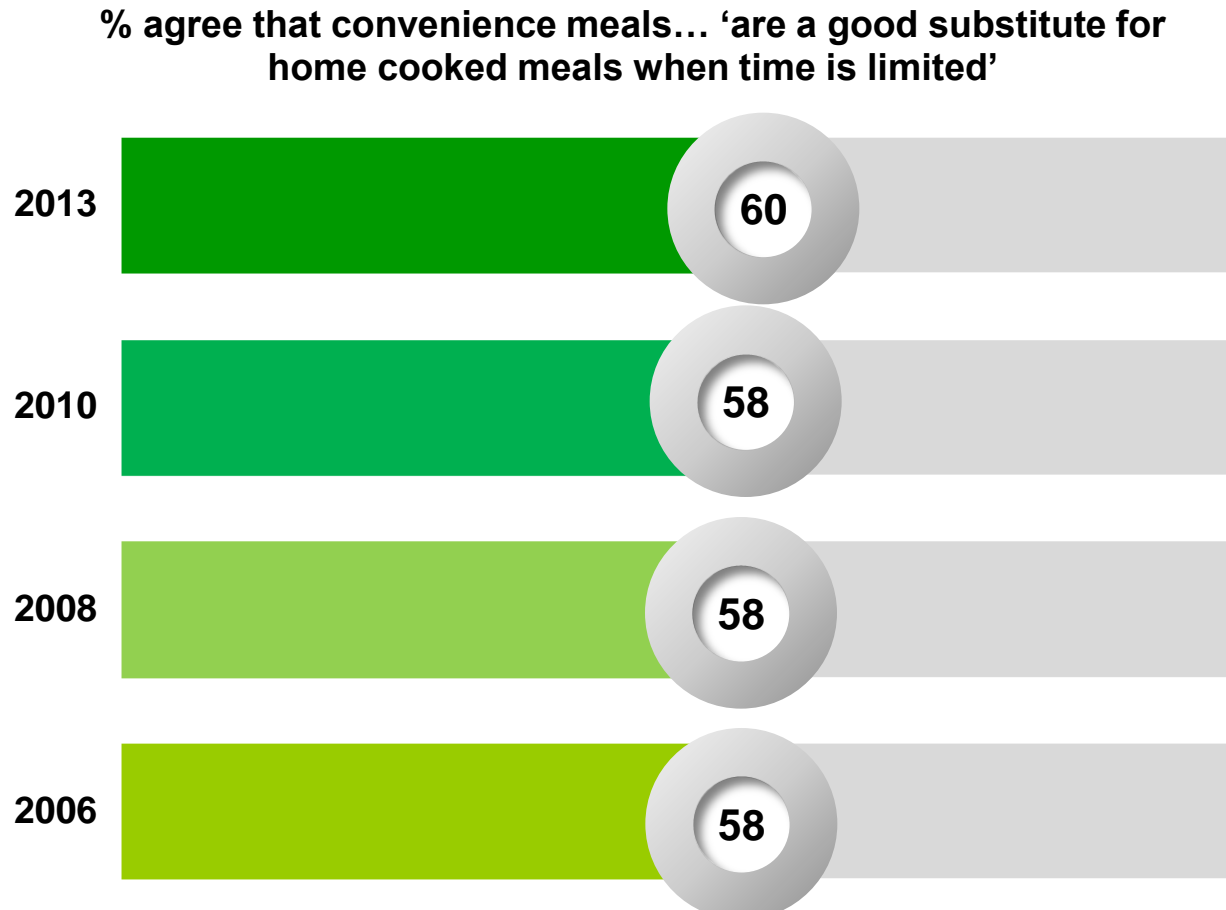
15

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



Spain is similar to most other countries in its claims about eating convenience meals less often.

The perception of convenience meals being a good substitute for home cooked meals has not altered in Spain in recent times, with six in ten agreeing with this concept. 16



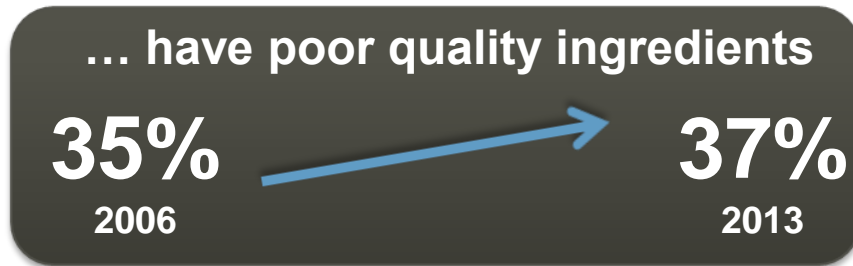
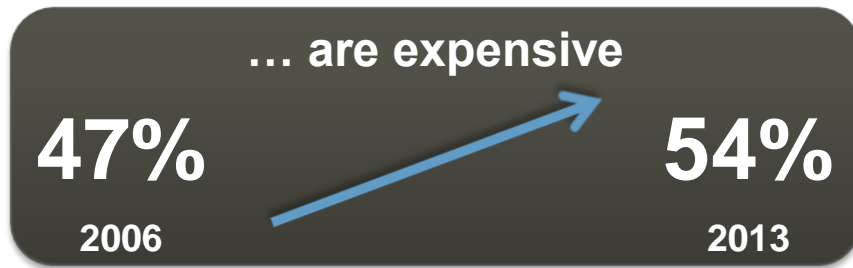
France displays the highest level of agreement with the idea that convenience meals can be a good substitute for home cooked meals. Germany and Spain rank second and third respectively.



Convenience foods are holding steady in when it comes to perceptions of value and ingredients. However, more now believe that they are an expensive food item.

17

In Spain, convenience foods.....



Spain shows average levels of support about convenience meals 'tasting great' or having poor quality ingredients. They rank in the top three when it comes to believing that these foods are good value for money.

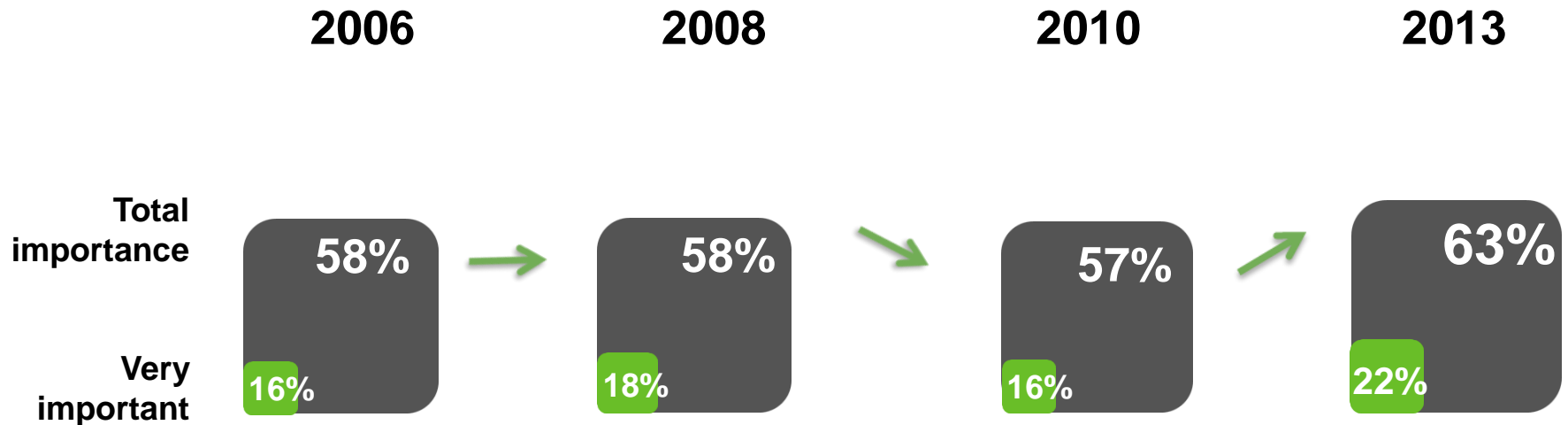
# Back To Basics



2013 represents the first time that there has been a notable change in the importance placed on buying local produce.

19

### Importance of buying local produce when shopping

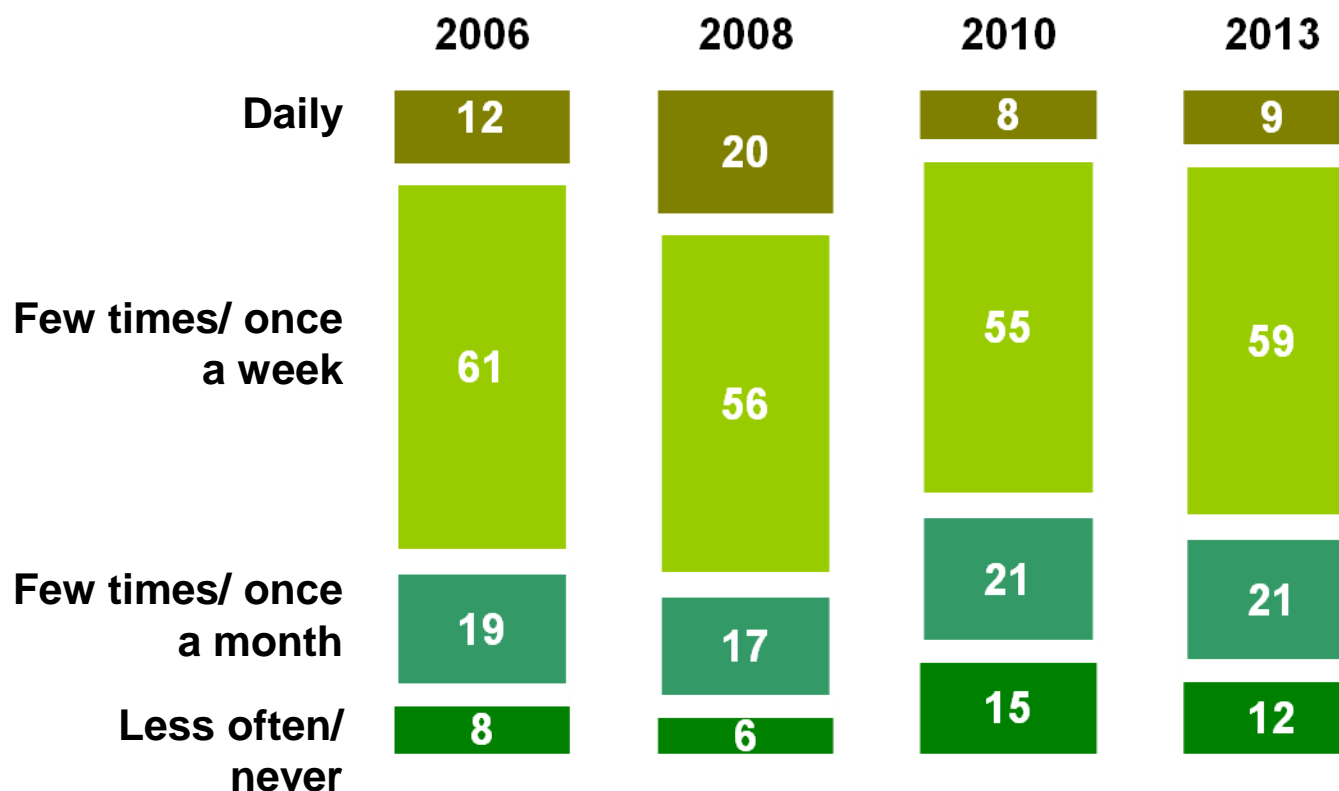


In overall terms, Spain ranks third in terms of the importance placed on buying local food, behind France (73%) and ROI (70%).

The recent improvement to the importance placed on local food has not resulted in enhanced levels of local food purchases. These continue to remain stable overall.

20

### Frequency of 'Local' Food Purchases



In comparing the daily/ few times a week/ once a week purchasing behaviours of respondents, Spain ranks second highest behind Sweden.

'Local' food is mainly considered to be food that is made in close proximity to where one lives. The association with farmers' markets is relatively weak.

21

The majority believe that local food is ...

**47%**

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

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

**38%**

*... made within the province I live*

**26%**

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

**17%**

*...available in farmers' markets*

**15%**

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

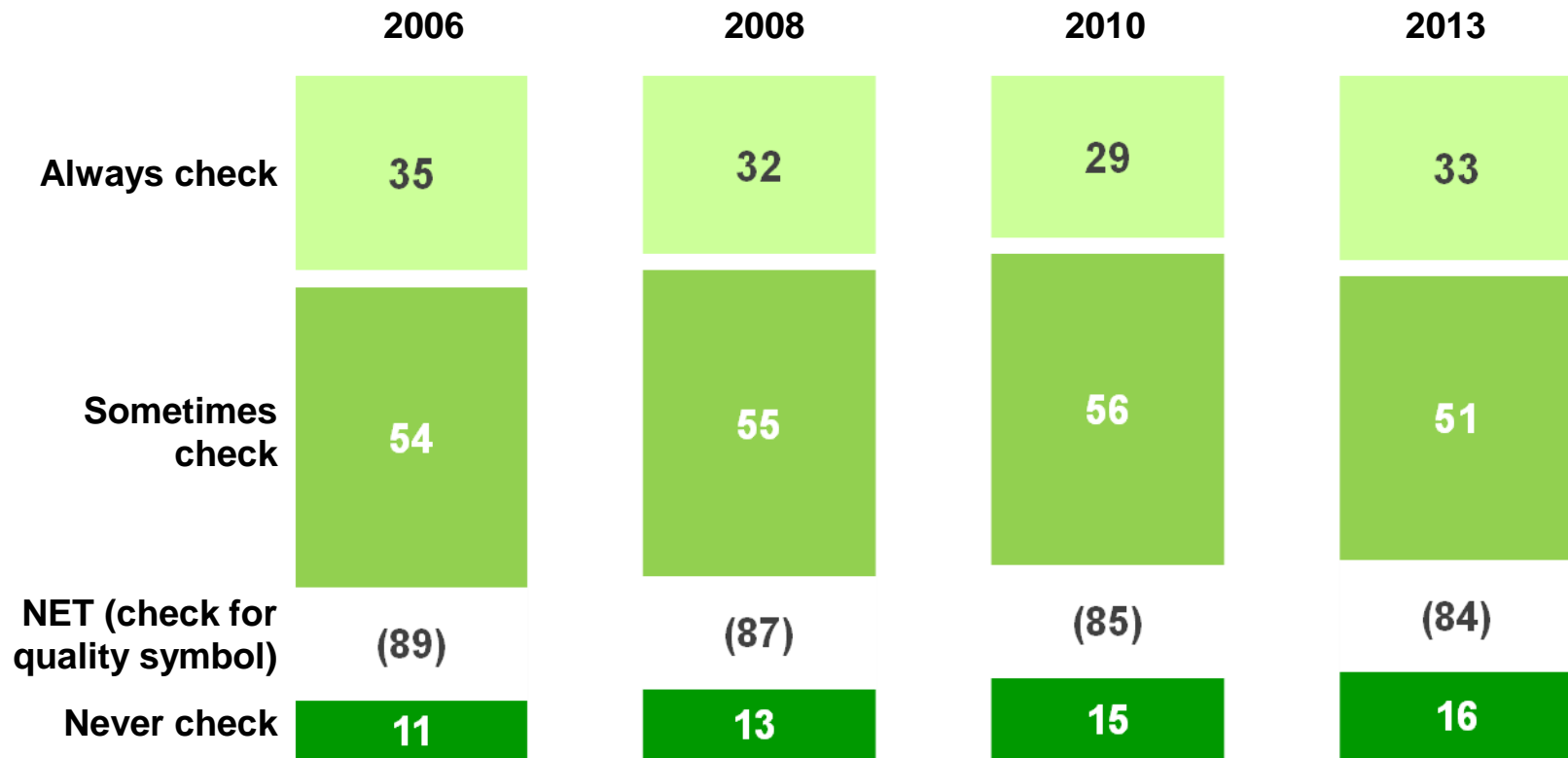
Very few believe that local is food that is...

**1%**

*...made within Europe*

Checking for country of origin has declined somewhat in Spain. However, at more than eight in ten, it remains a strong feature of grocery shopping behaviour. 22

### Checking for Country of Origin label

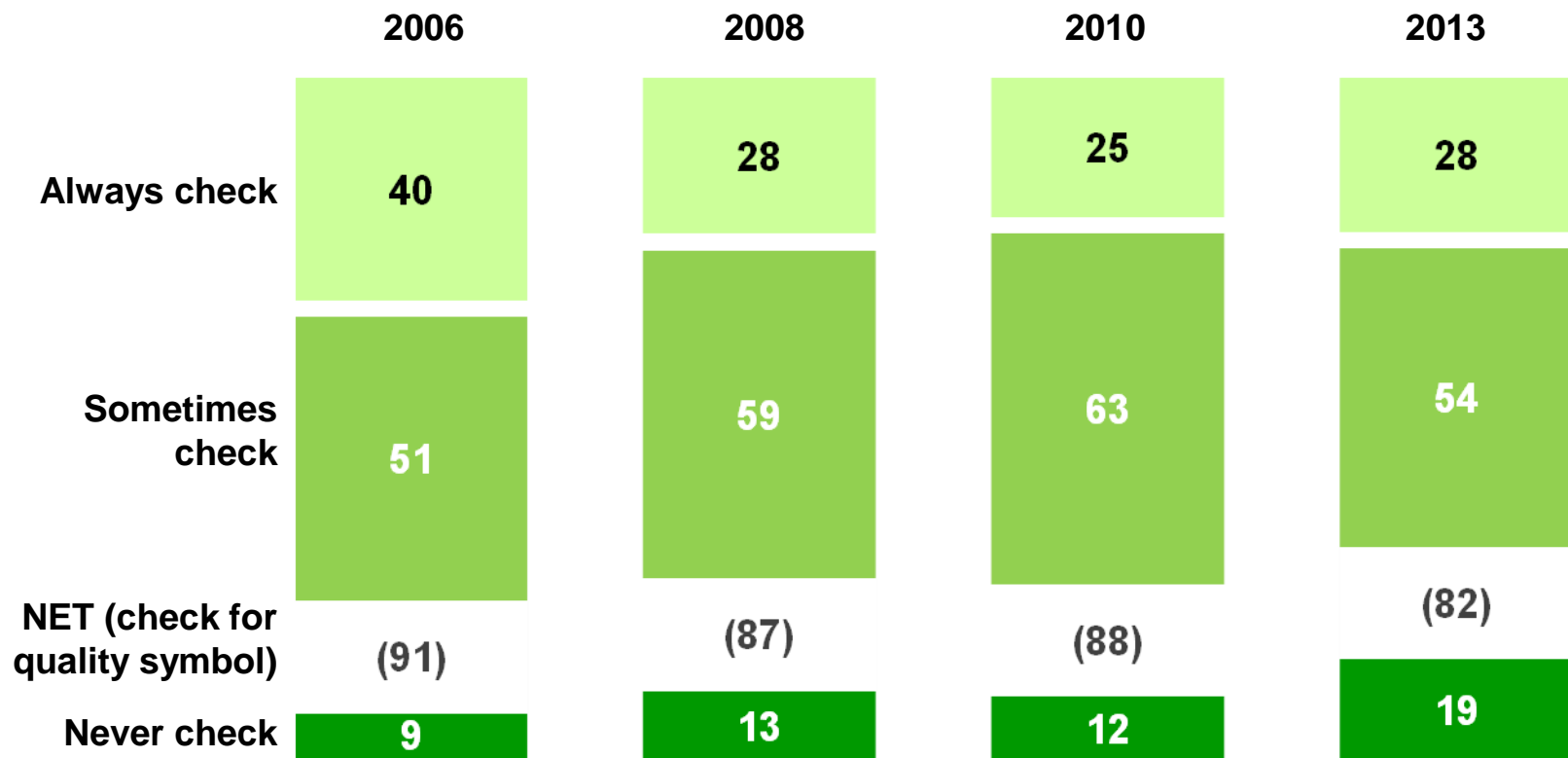


The act of checking for country of origin on food labels is most popular in Sweden (92%), Spain and France (83%).

The Spanish are now less likely than ever before to check for a quality symbol on their food products. Their propensity to check has been steadily declining since 2006.

23

### Checking for Symbol of Quality label

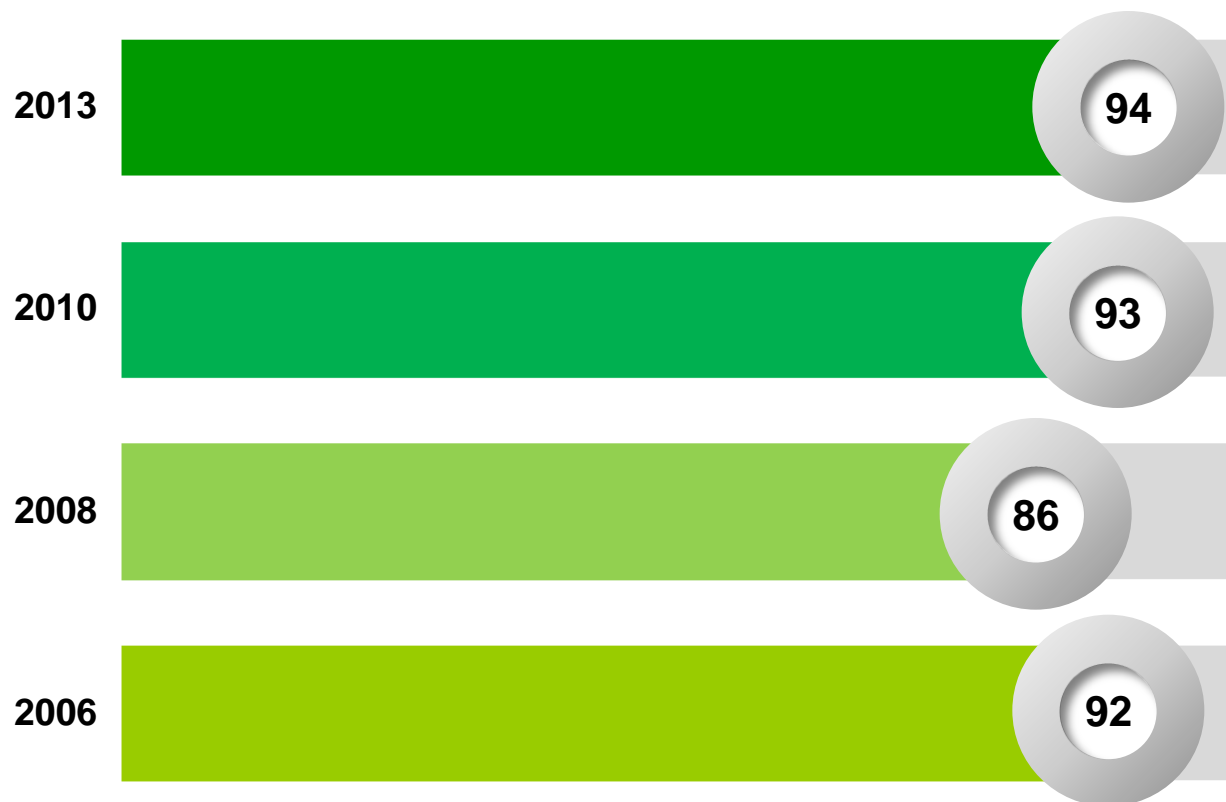


Spain, alongside Sweden is the most likely of all the countries surveyed to check the quality symbol on food.

The Spanish continue to place strong emphasis on eating dinner together as a family and have seen an enhanced buoyancy in this belief since 2008.

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.



# Food & Sustainability



Awareness of food miles has improved since 2010 and as a result, has been met with a considerable rise in the proportion of people buying food with low food miles.

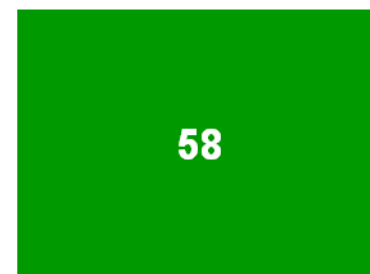
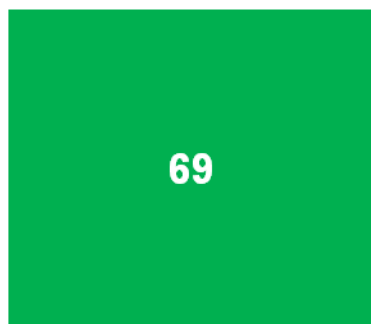
26

### % never heard of food miles

2008

2010

2013



% who buy  
foods with  
low food  
miles



2008

2010

2013



*TOTAL % who buy foods with low food miles*



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

Spain has the highest proportion of people who claim to have never heard of food miles.  
Alongside GB, Spain purchases food with low food miles the least.

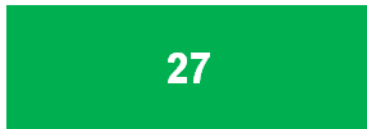
The proportion of people claiming to have never heard of sustainability has increased in the past three years. However, purchases of sustainable foods has also increased. 27

**% never heard of sustainability**

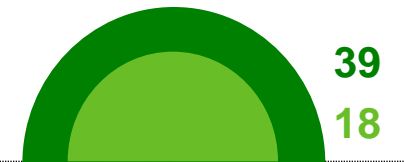
2008

2010

2013



**% who buy foods with sustainable features**



2008

2010

2013



*TOTAL % who buy foods with sustainable features*



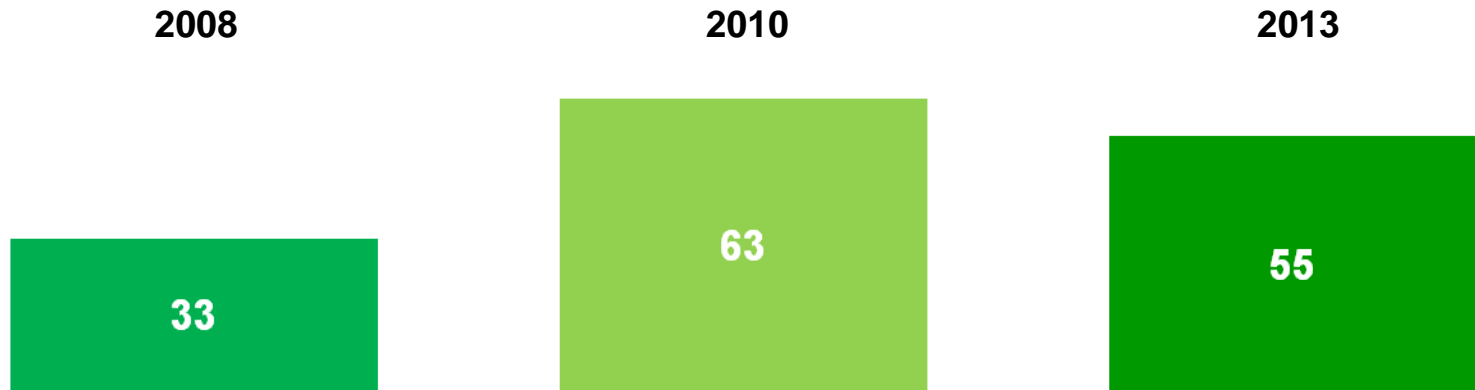
*% who sometimes try to buy food with sustainable features*

Spain has average awareness of sustainability while its purchases of food with sustainable features is one of the lowest.

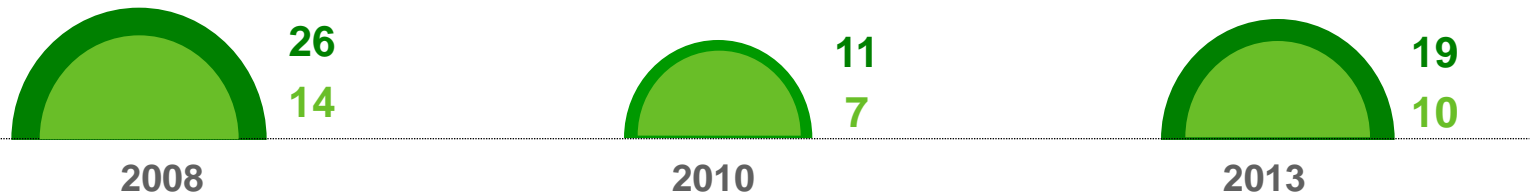
Since 2010 awareness of carbon footprint has improved. Purchases of low carbon footprint foods have also improved; although they are still well below 2006 levels.

28

### % never heard of carbon footprint



### % who buy foods with low carbon footprint



*TOTAL % who buy foods with low carbon footprint*



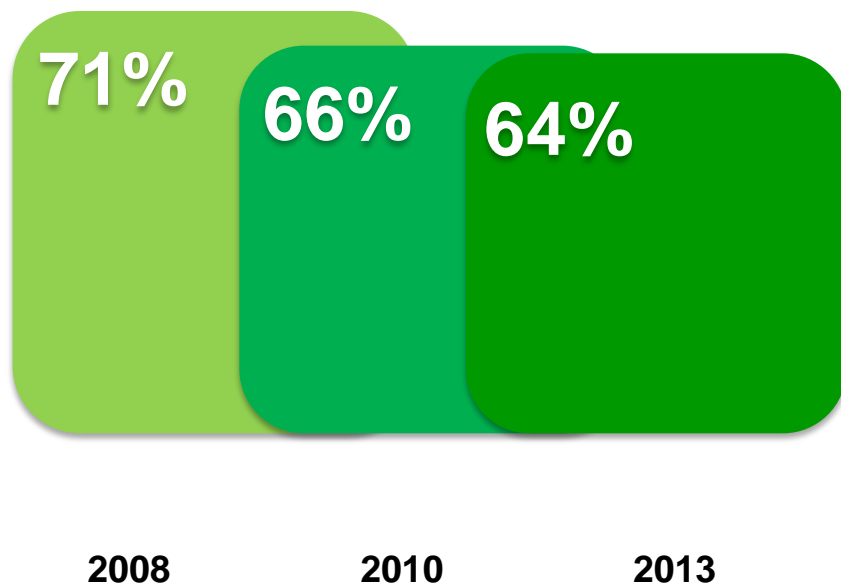
*% who sometimes try to buy food with low carbon footprint*

Spain is the least aware of the term 'carbon footprint' and as a result also has the lowest levels of purchase of foods with a low carbon footprint.

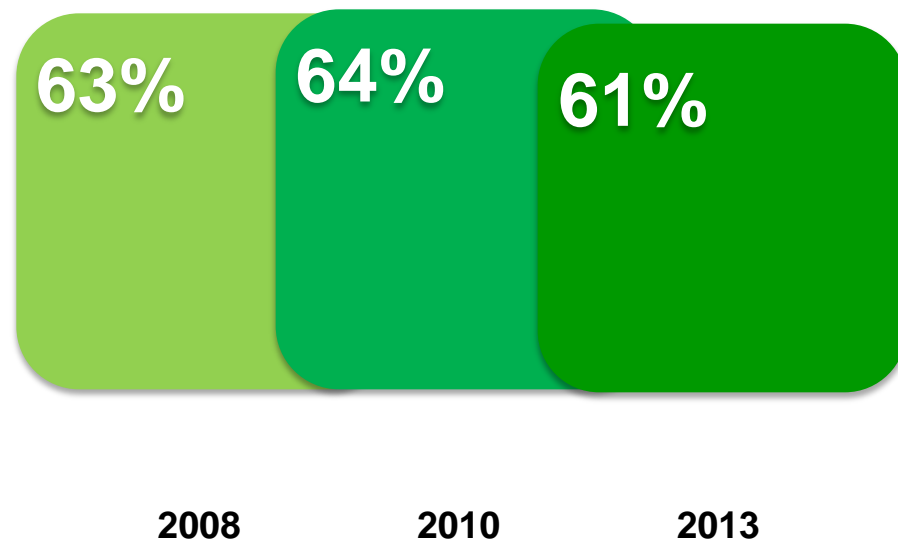
Positivity surrounding environmental issues has shown signs of deterioration in Spain, particular in relation to choosing environmentally friendly products.

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**

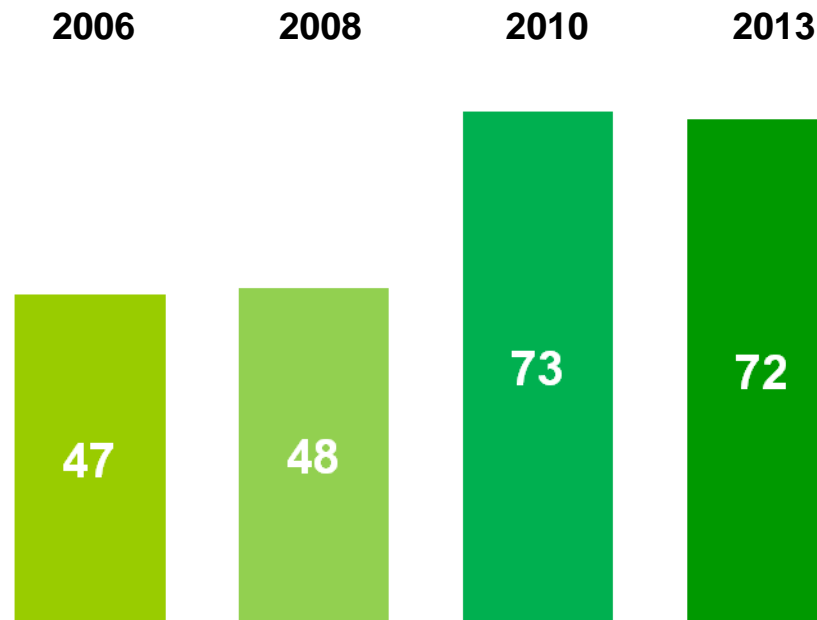


Spain and France rank joint top for consciousness of environmental issues in product choice. Sweden (64%) and Spain rank the highest when it comes to buying from environmentally aware companies.

Buying in smaller packs to avoid waste is a significantly more popular behaviour amongst Spanish grocery shoppers now than in the past.

30

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

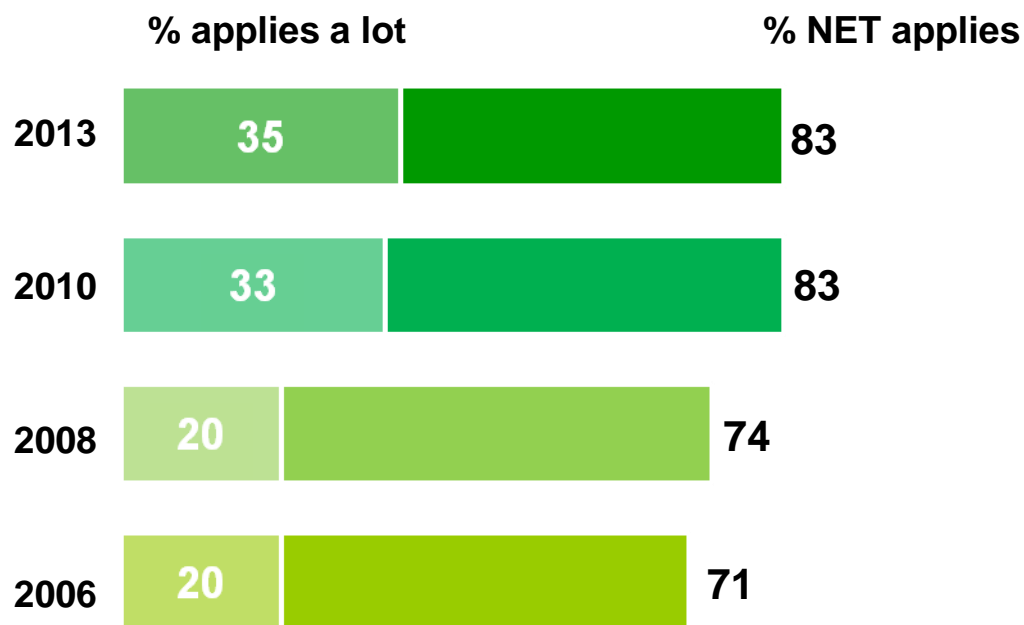


The Germans (81%) are particular conscious of cutting down on food waste. The Spanish, however, rank in second place overall.

Efforts to buy Fair Trade products by Spanish adults have improved since 2006. Current efforts seem to have stabilised since 2010.

31

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



Of all the countries surveyed, Spain claim to try to buy Fair Trade products the most while the US (45%) are the least inclined.

# Shopping Around

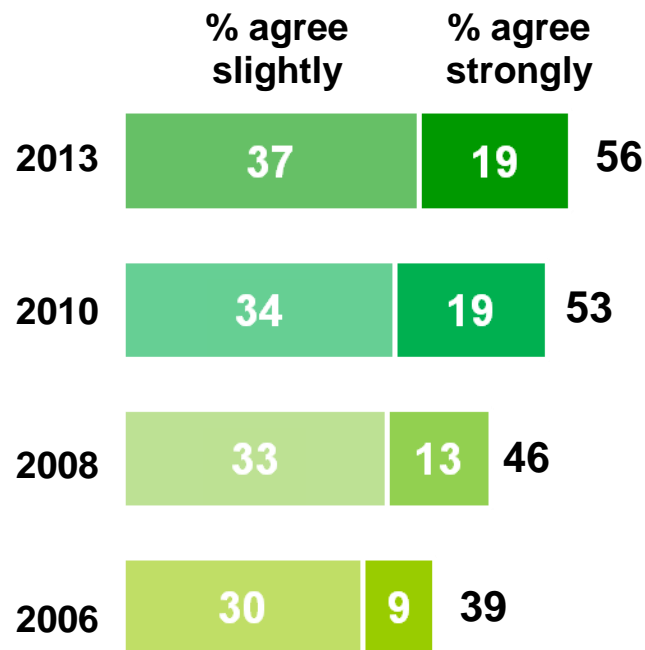




Price as a main driver of behaviour when grocery shopping continues to increase in popularity in Spain. Price is considerably more important now than eight years ago.

33

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

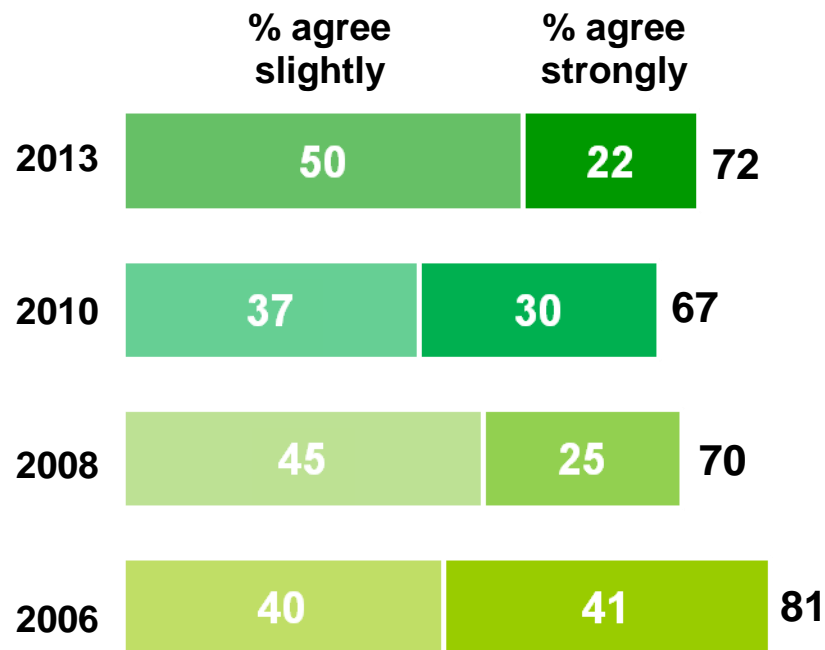


Spain displays similar attitudes towards price as many other countries. Looking for price as a 'first thing' is a more important shopping behaviour in NZ (68%) and ROI (64%).

Placing quality above price has seen a resurgence in Spain in the last three years. Compared to 2008, quality concerns carry much less weight in shopping decisions.

34

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

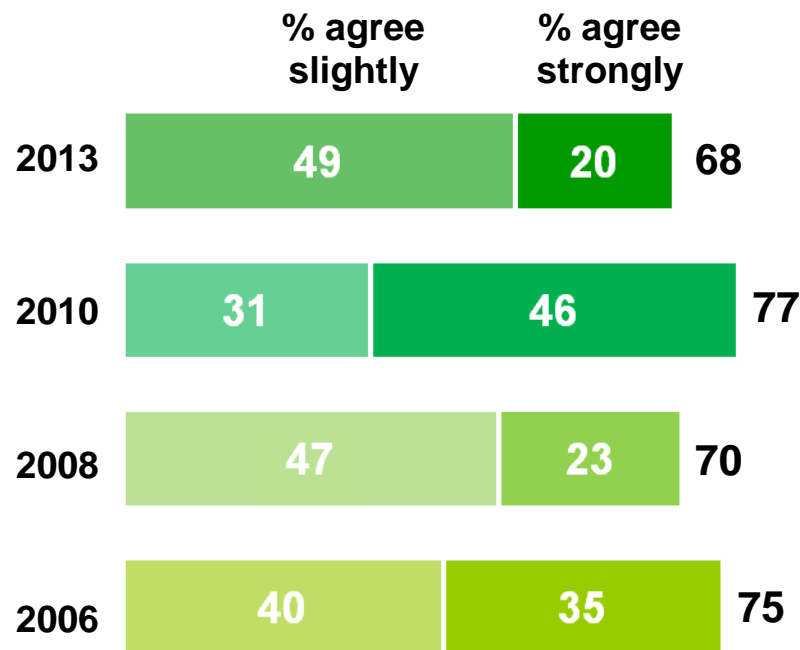


Spain ranks third for placing quality above price. It is behind only ROI (79%) and Sweden (77%).

Getting value for money in the same store is important for more than two thirds of Spanish grocery shoppers. However, it's importance has declined since 2010.

35

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

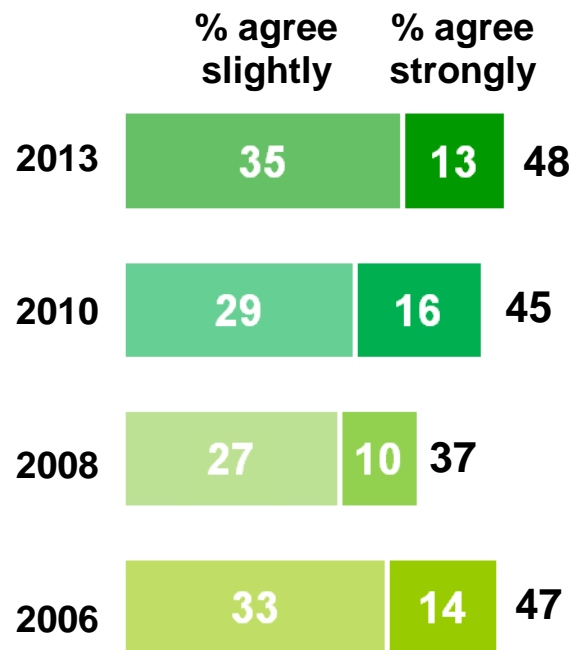


Value for money in the same store is most important to the NZ grocery shopper (84%).  
Spain ranks amongst the lowest alongside Sweden (63%) and Germany (56%).

Almost half of Spanish grocery shoppers state that they would pay a bit more for grocery shopping to get superior customer service.

36

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



Spain and Sweden (47%) rank top when it comes to willingness to pay more for customer service.

Buying on impulse is not a dominant feature of Spanish grocery shoppers. It is a behaviour that has declined substantially since 2006.

37

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

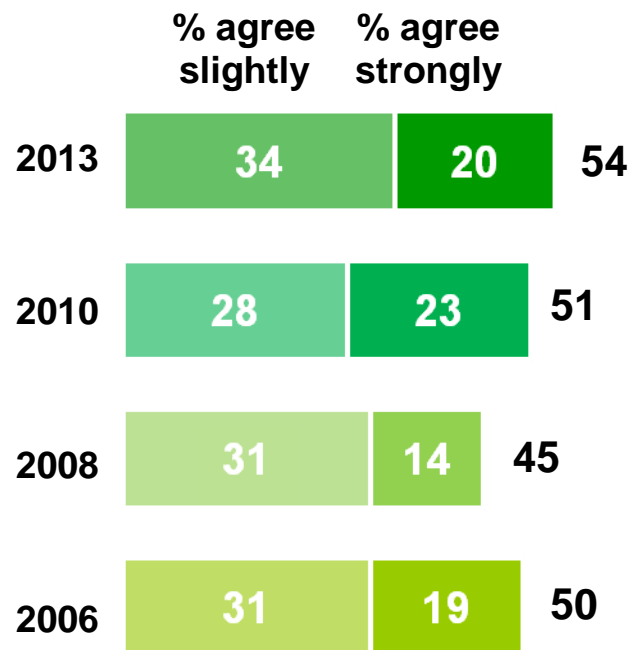


Spain is one of the least like countries to behave impulsively, even when products are cheap. GB considers itself to be the most impulsive (54%).

Spending time looking for a bargain has been a fairly stable behaviour in Spain, though its popularity has improved since 2008.

38

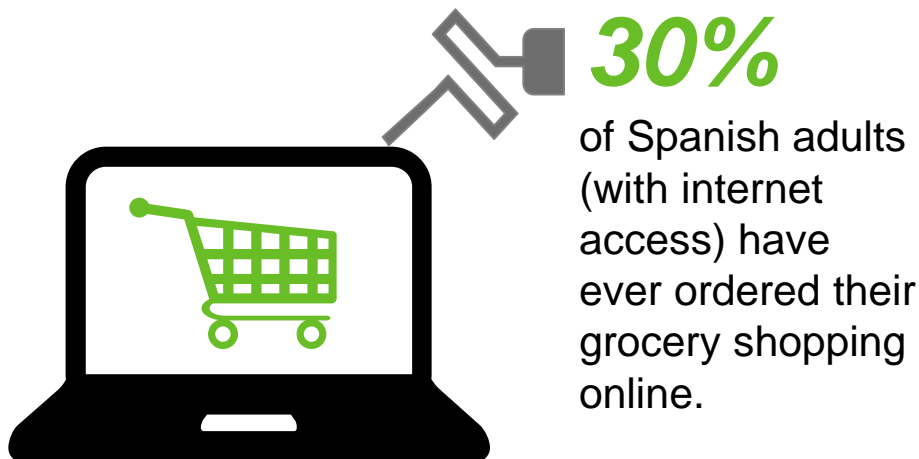
***I don't mind spending time looking for a bargain***



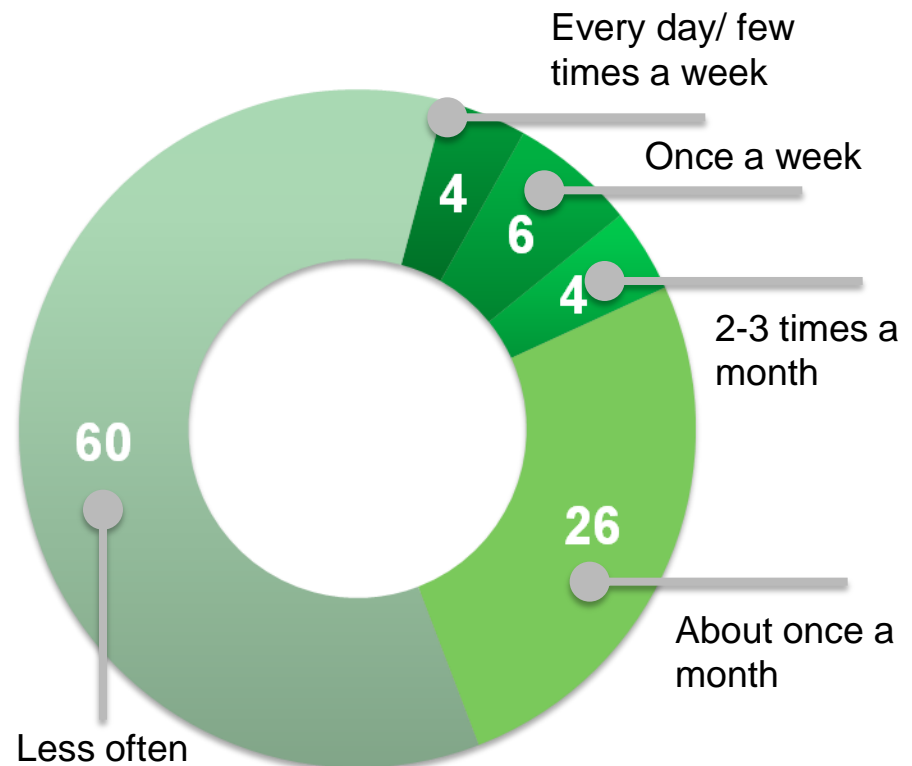
The US are the biggest bargain hunters (63%) while Spain sit alongside the Netherlands and GB with a relatively average inclination to bargain hunt.

Three in ten Spanish adults have ordered their grocery shopping online. Of these, four in ten are ordering their groceries once a month or more often.

39



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



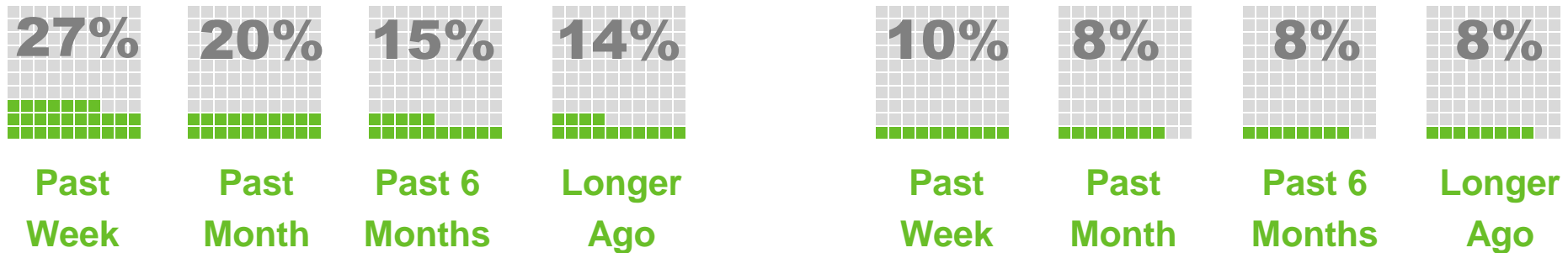
Spain and GB (28%) have the highest percentage of people who have ordered their shopping online. It ranks behind France and GB however, in terms of frequency of online grocery purchases.

More than three quarters of Spanish adults have downloaded a recipe while just over one third have downloaded a mobile phone food app.

40



Most recent download activity



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



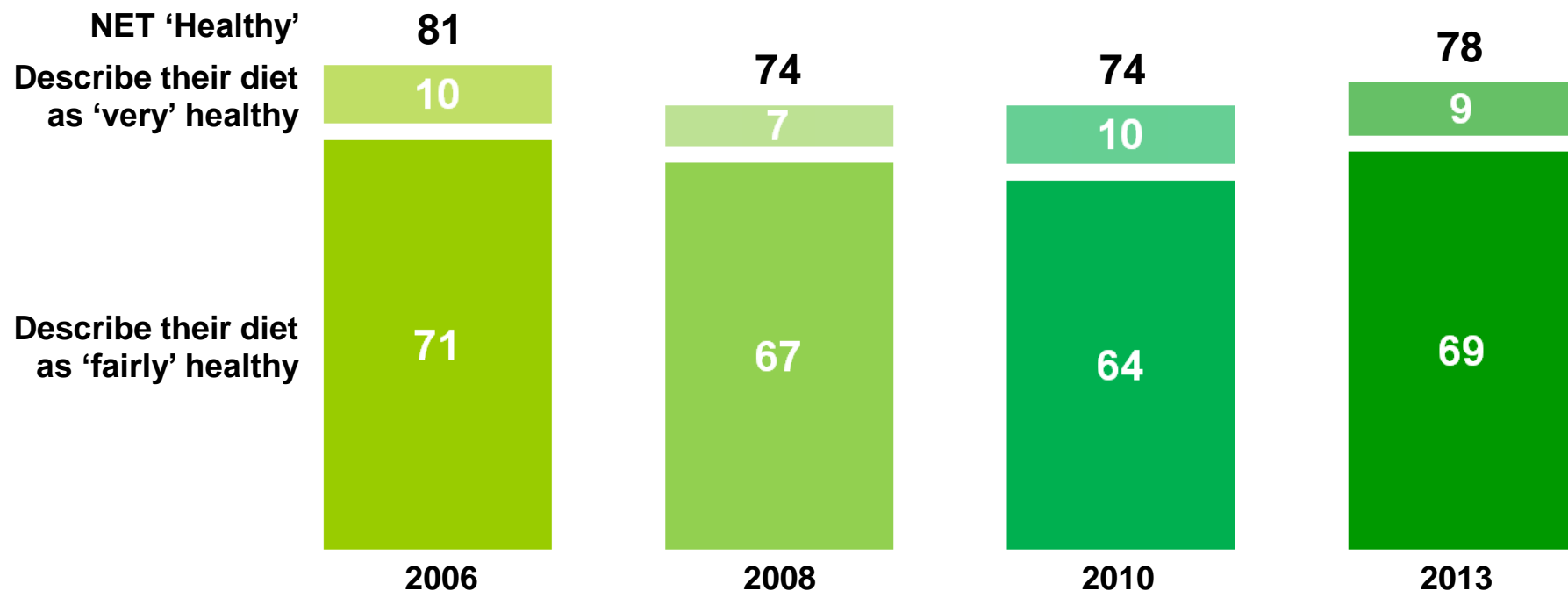
# Health & Wellbeing



More than three quarters of Spanish adults consider their diet to be healthy. This represents a slight improvement in recent years.

42

### Diet Perceptions – Spain

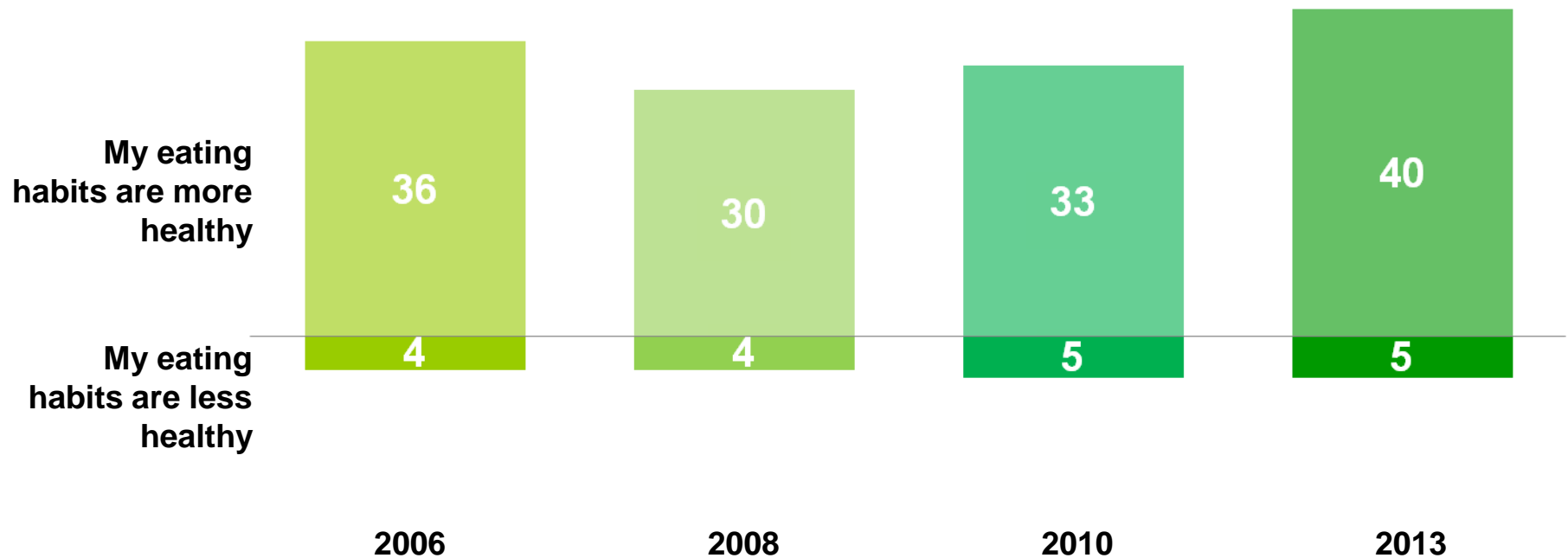


ROI considers itself to be the healthiest country. Spain ranks joint third alongside GB and Sweden.

Four in ten Spanish adults believe that they are eating more healthy than before. This represents the highest proportion across all previous research waves.

43

### Changes in eating habits in last 12 months

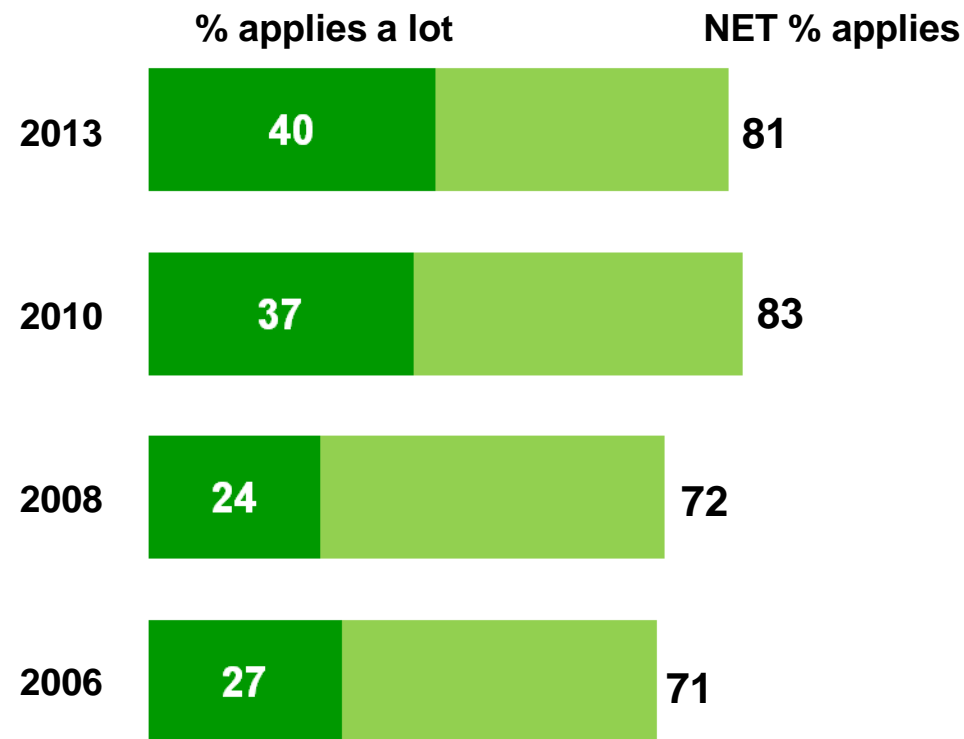


Spain has the highest proportion of people claiming to be eating more healthy than 12 months ago.

Efforts to eat at least 5 portions of fruit and veg each day are showing signs of stability since 2010. Current levels are much improved on 2006 results.

44

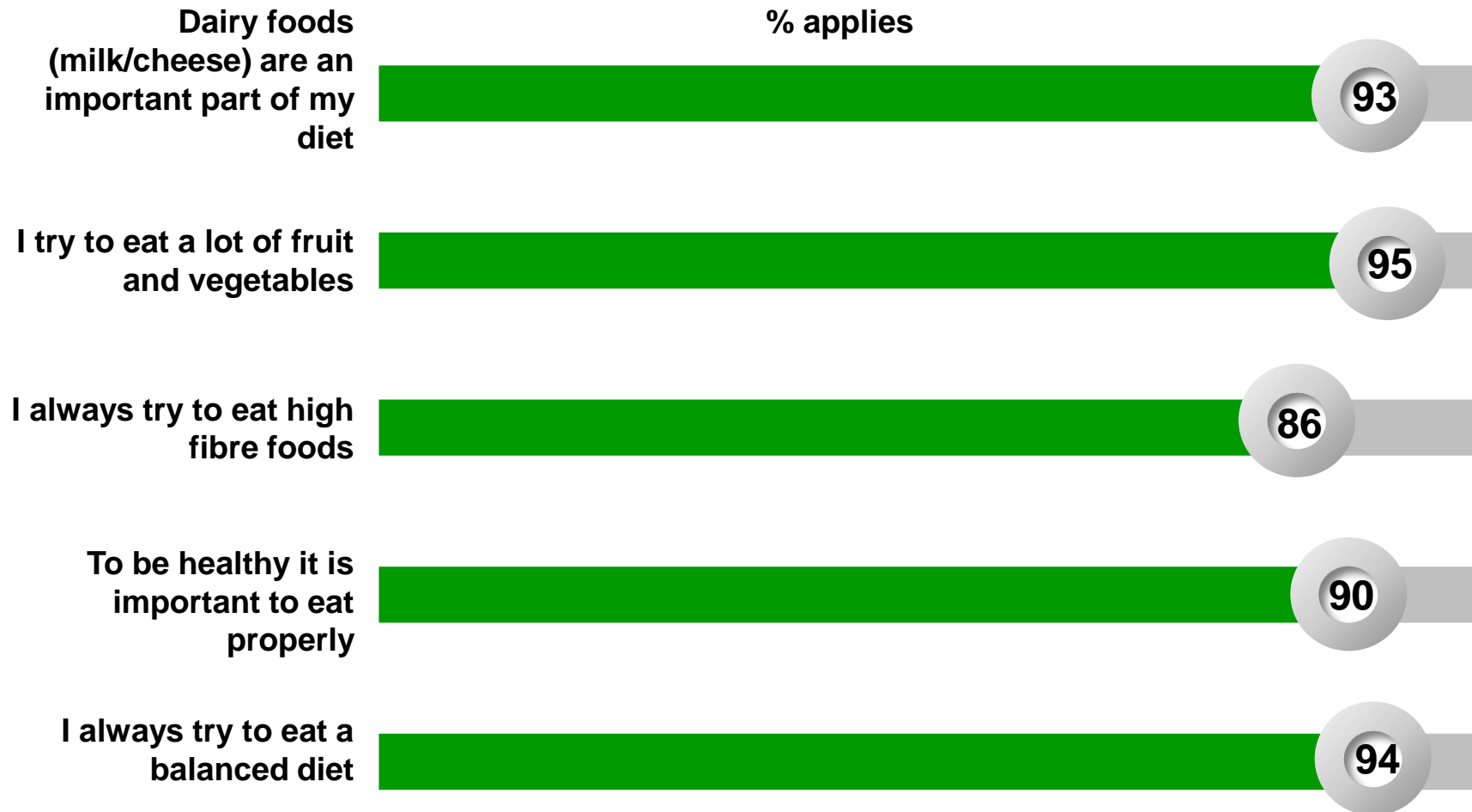
***I eat at least 5 portions of fruit and veg per day***



Spain ranks first for efforts to eat the recommended '5 a day'.

In Spain high-fibre foods are consumed less than dairy and fruit and veg. Eating properly and having a balanced diet are extremely important to the Spanish.

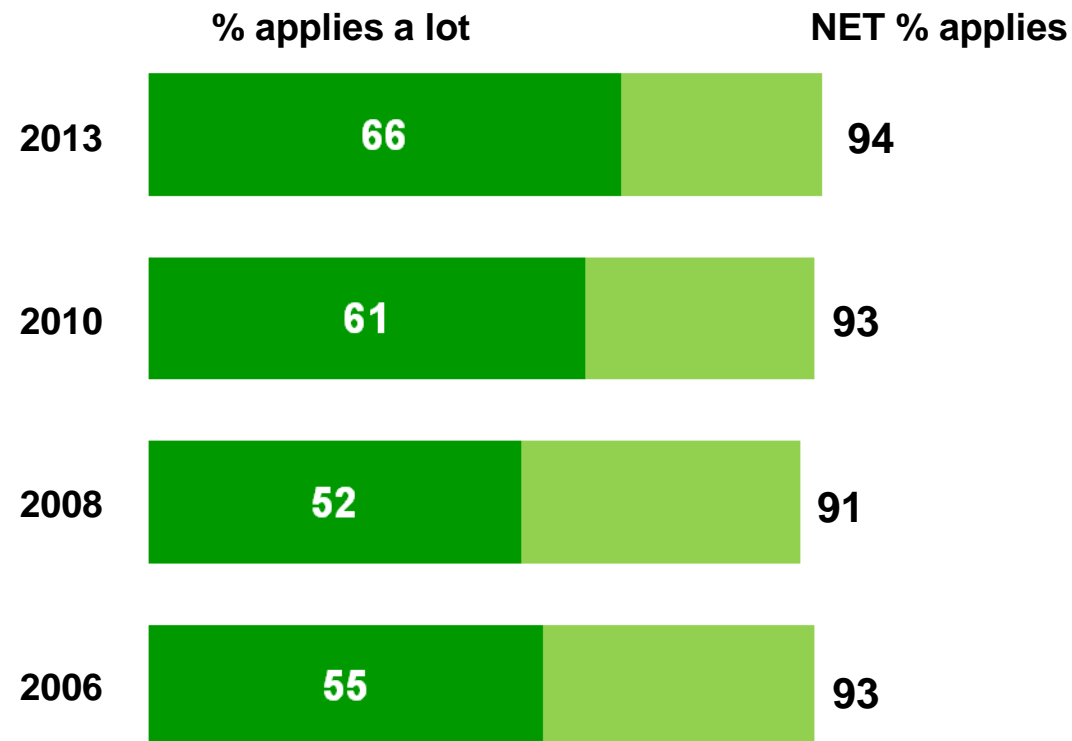
45



Claimed efforts to limit the amount of fast food that is consumed by Spanish adults have always been strong.

46

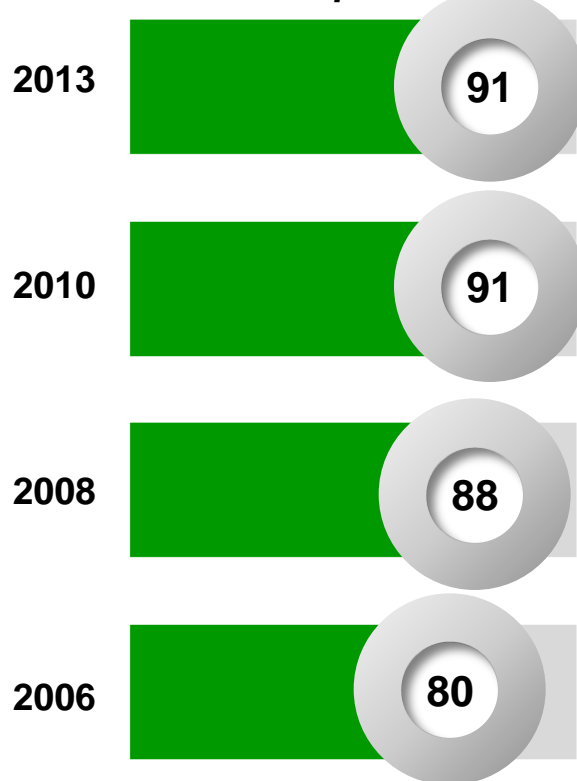
***I try to limit the amount of fast food that I consume***



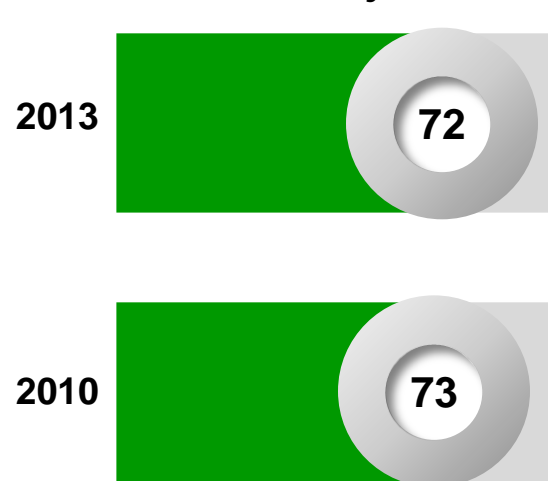
Spain claims to be making the biggest effort in limiting its fast food consumption. However, it seems that all countries are making efforts in this area.

The Spanish display a strong belief in the benefits of 'low fat' foods and have done so for a number of years. Calorie considerations are important for more than 7 in 10 adults<sup>47</sup>

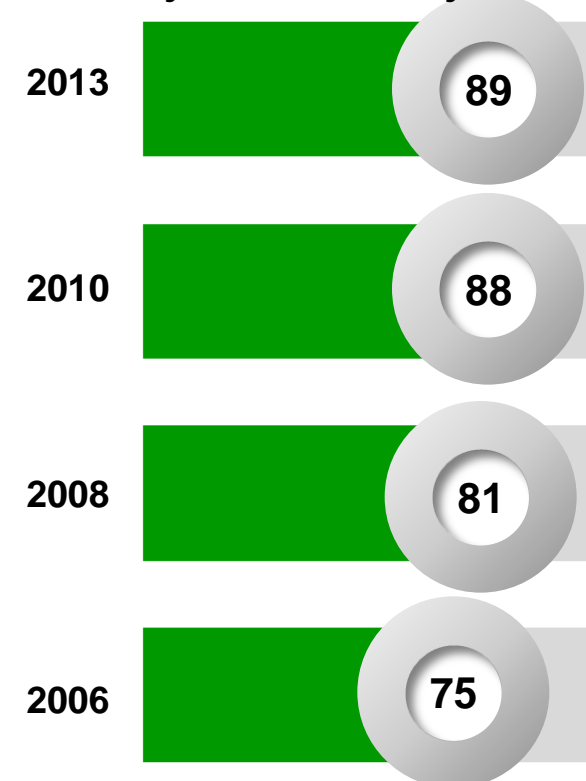
**% applies that *'always look for low fat options when buying food products'***



**% 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'***

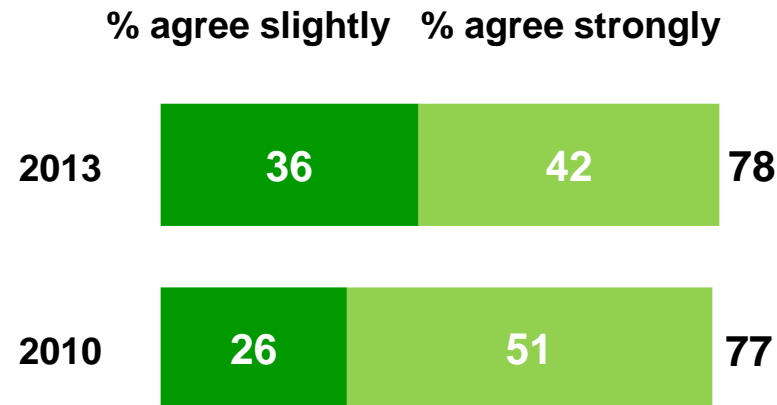


Spain ranks first of all countries in the PERIscope 2013 study for all of the statements presented above.

High levels of concern about obesity amongst children continue unabated in Spain.

48

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



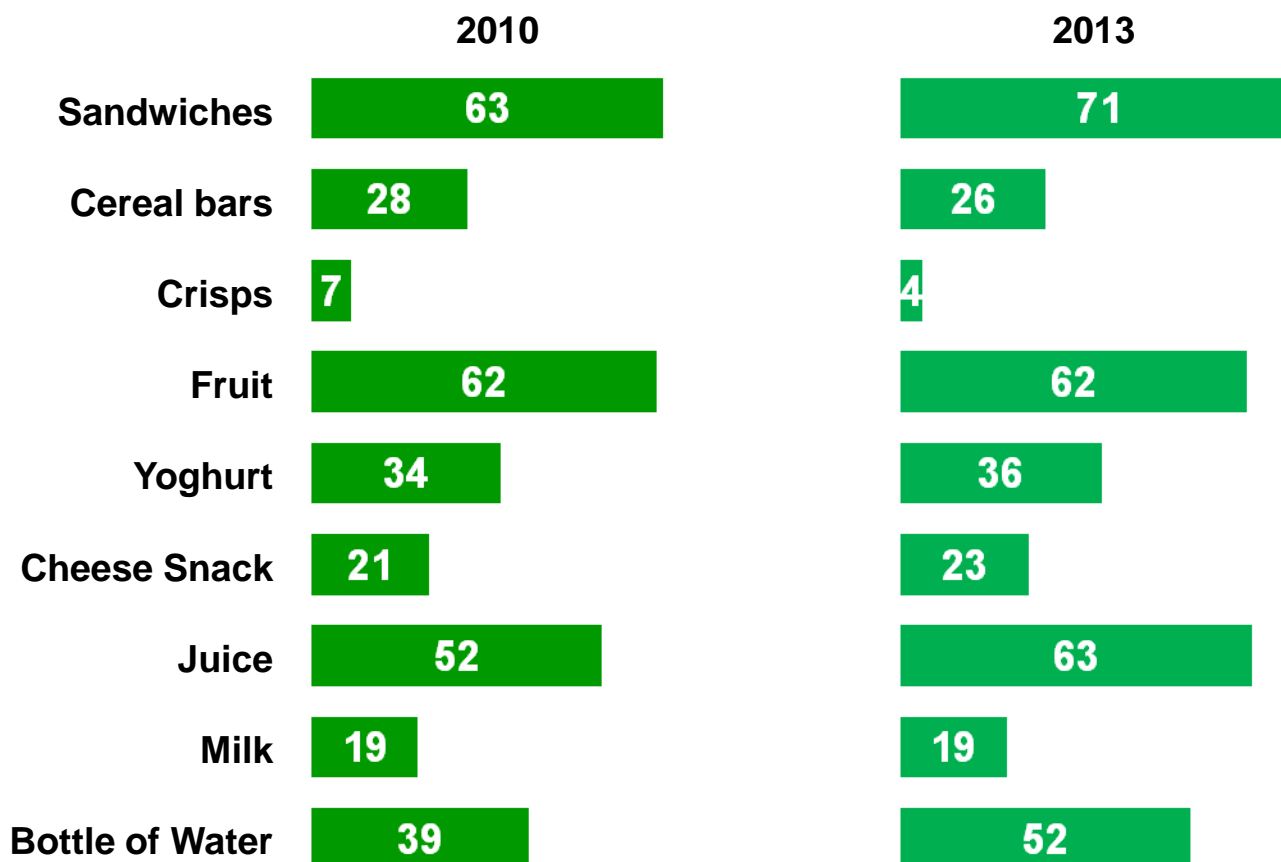
The highest levels of concern regarding obesity amongst children is in Spain.  
The lowest levels of concern are in ROI & GB (31%).



Lunchbox components have remained relatively stable in the last three years. However, there has been a rise in the inclusion of water, juice and sandwiches.

49

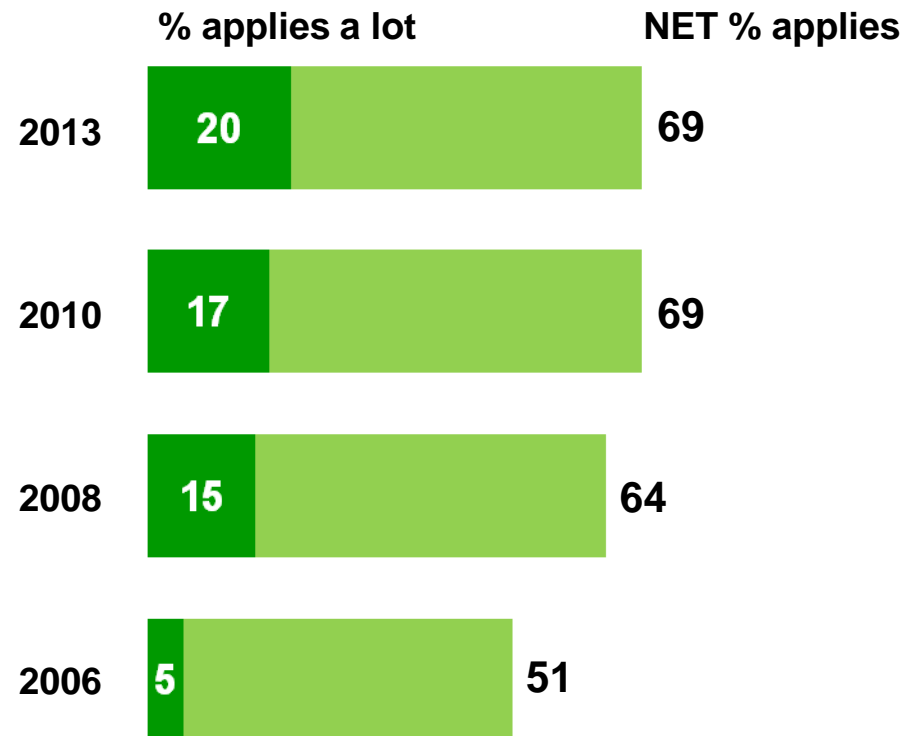
### Content of kids' lunchboxes – Spain



The assertion that healthy food is limiting and boring resonates with almost seven in ten Spanish adults. This negative attitude has increased in recent years.

50

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

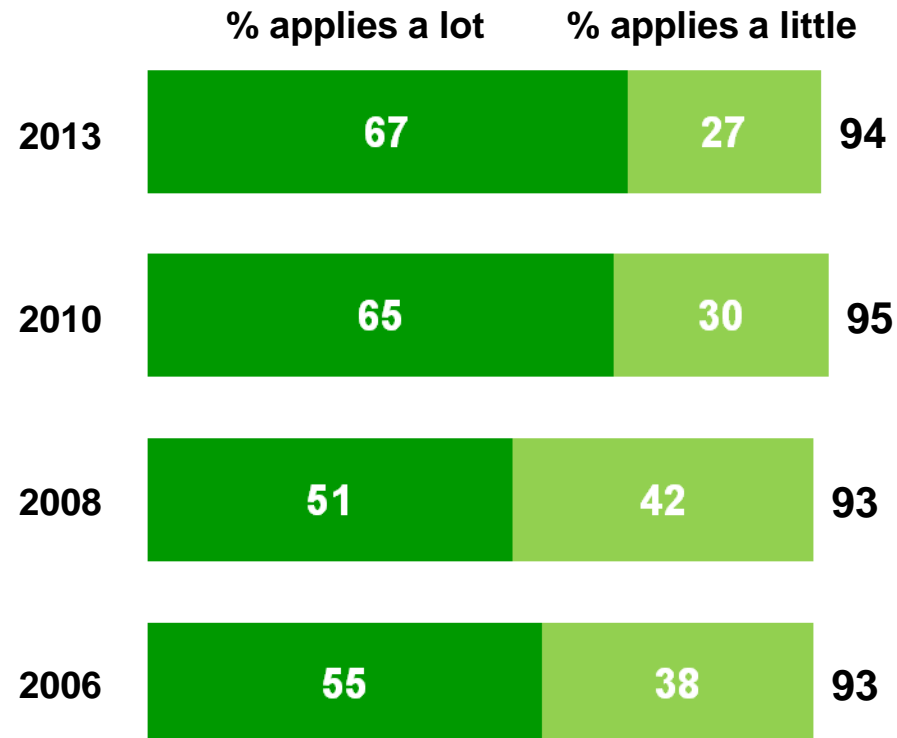


Spain ranks highest in terms of associating health food with food that is limiting and boring.

The vast majority of Spanish adults want manufacturers to help them to eat healthy. This desire has remained unchanged since 2006.

51

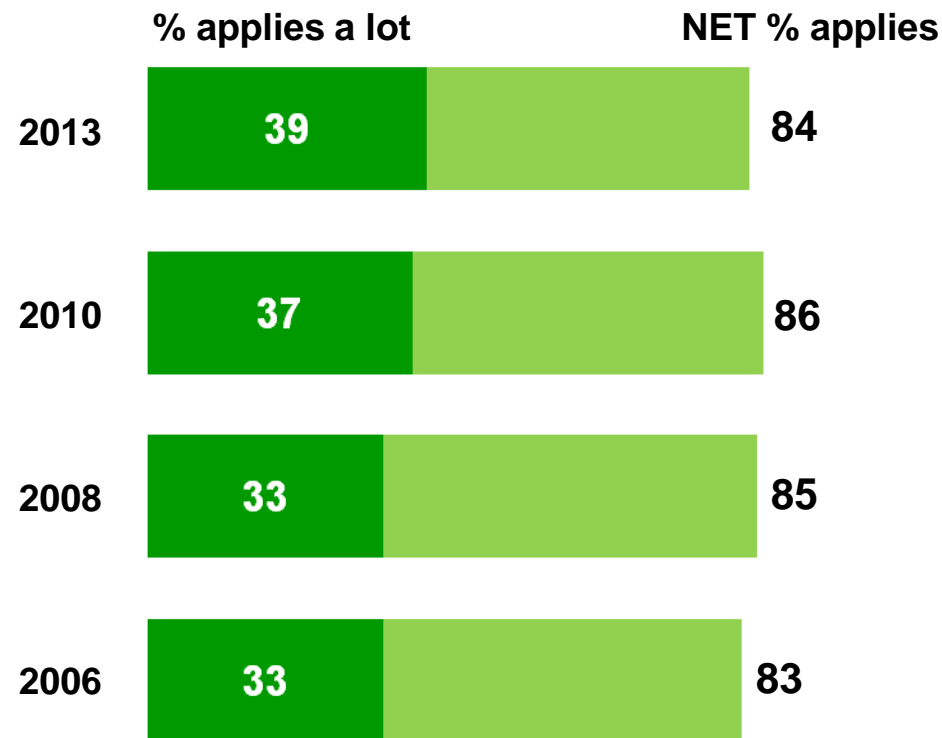
***I would like manufacturers to help me to eat healthy***



Spain, Germany(88%) 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 has always been high in Spain. There has been an improvement in the proportion who claim that this 'applies a lot' to them. 52

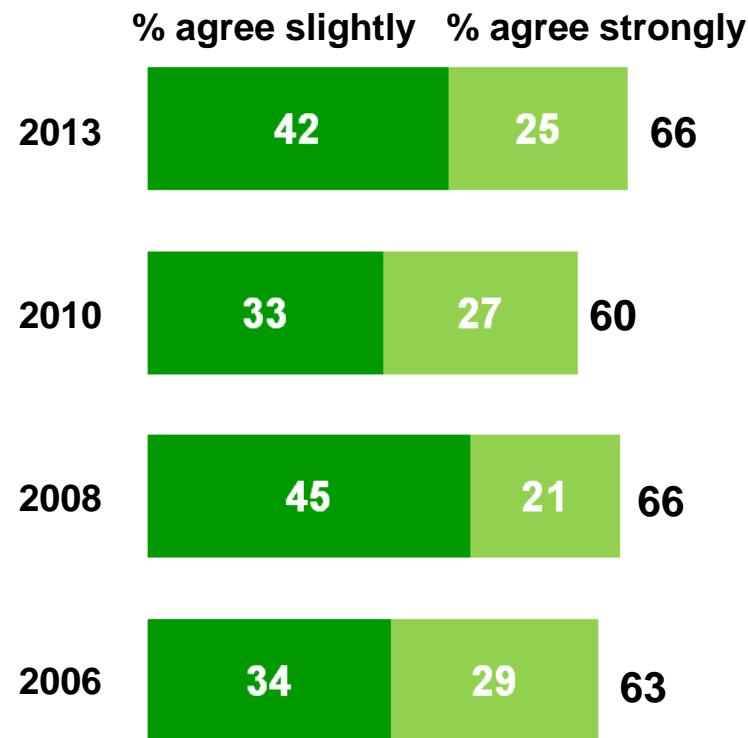
***I am willing to pay a bit more for healthy food and beverages (as long as they taste good)***



There are six countries in which more than 70% of adults are willing to pay more for healthy food and beverages. However, at 84%, Spain ranks first.

Two thirds of Spanish adults agree that they eat healthy to take control of their life. The proportion agreeing with this statement has remained stable in Spain in recent years. 53

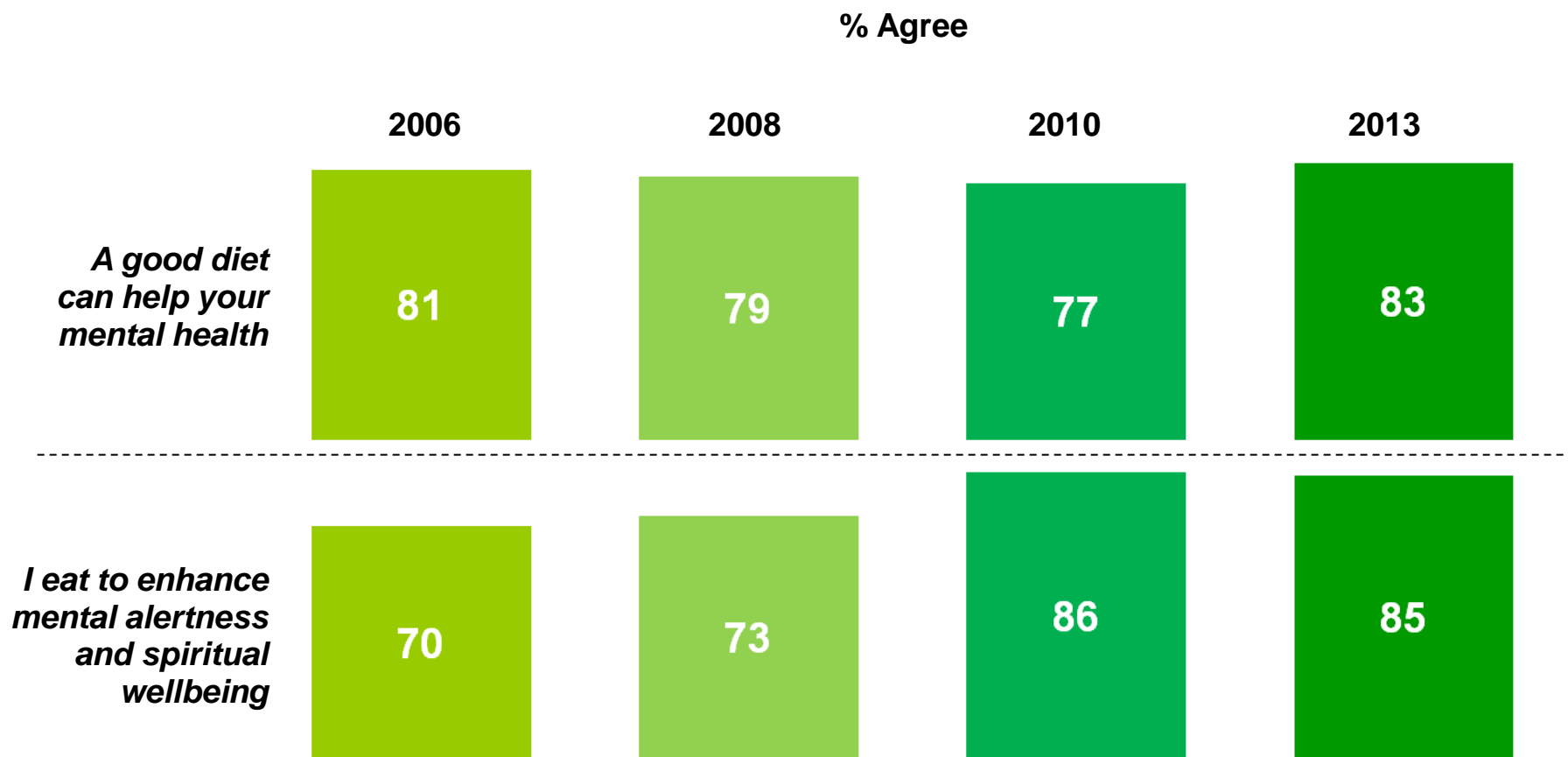
***I eat healthy to take control of my life***



The Spanish rank second in their claim that they eat healthy to take control of their lives.

Since 2008, Spain has shown rising support for the concept that diet can help mental health and foods can enhance mental alertness and spiritual wellbeing.

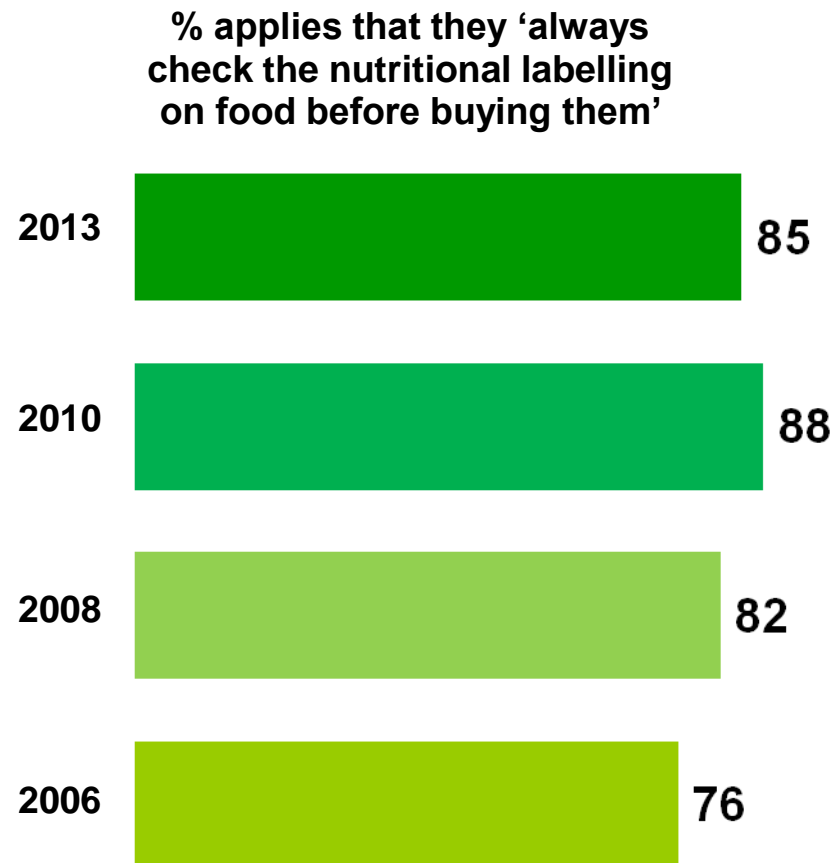
54



The majority of countries show more than eighty per cent agreement with the idea that a good diet can help your mental health. Spain ranks first in its assertion that it eats to enhance its alertness and spiritual wellbeing.

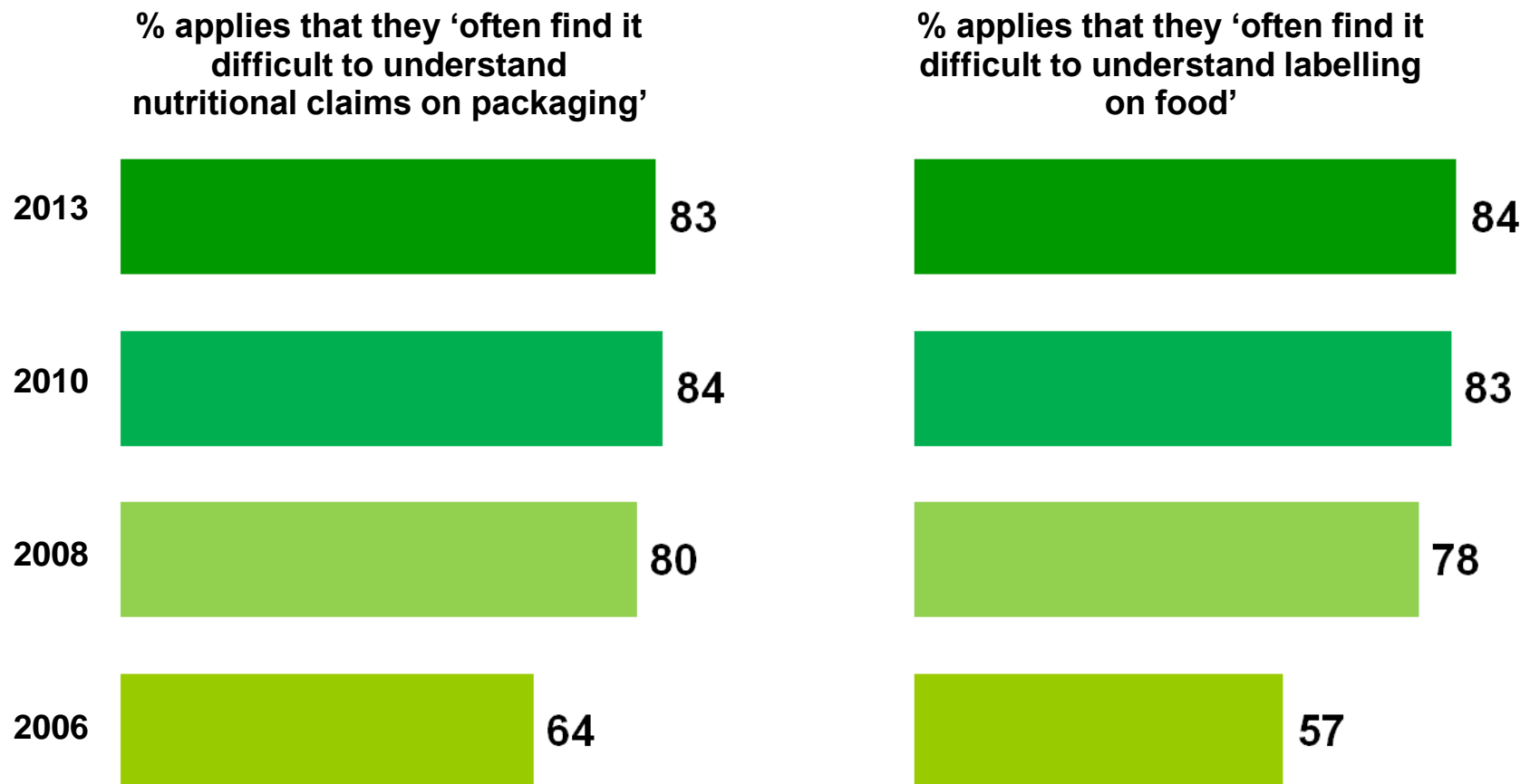
The Spanish grocery shopper continues to be quite likely to check the nutritional labelling on food before buying it.

55



Spain ranks first in its claim that it always checks the nutritional labelling on food before buying them. The US and NZ follow close behind.

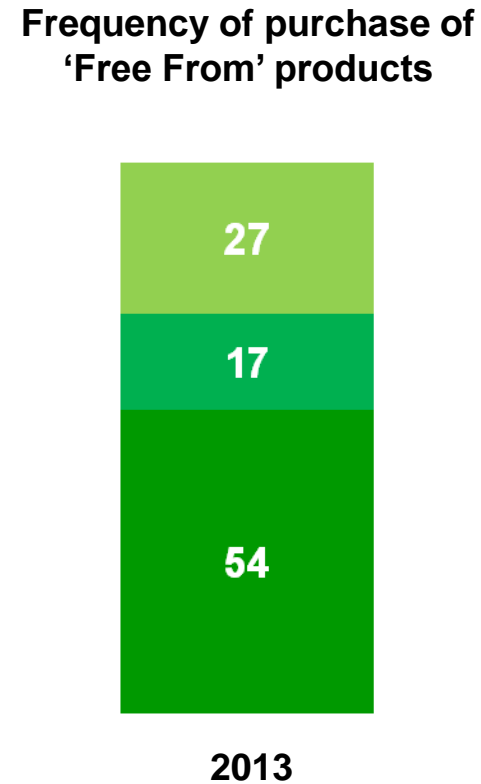
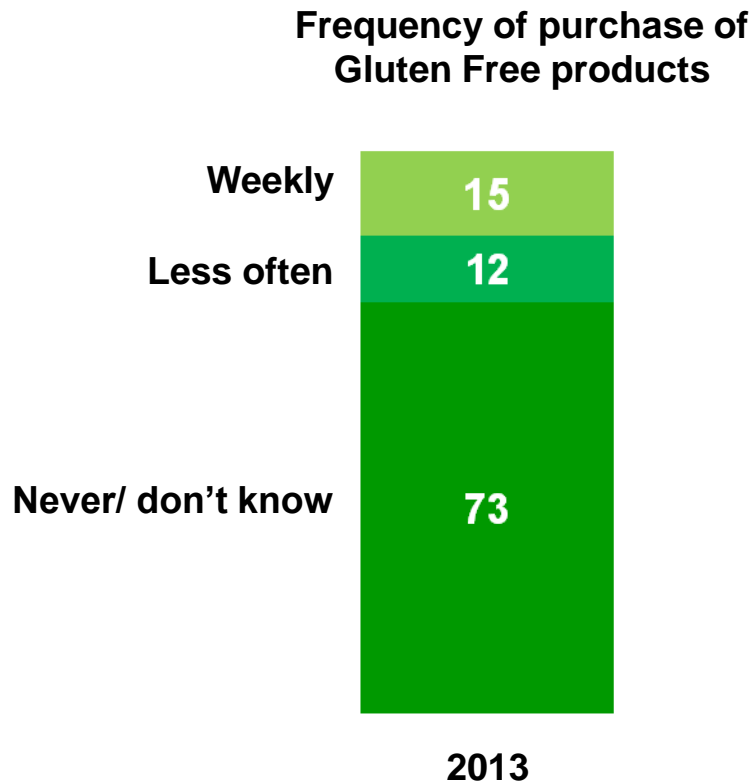
Compared to 2006, the Spanish are finding it more difficult to understand nutritional claims on packaging and food labelling. At more than eight in ten, confusion is high. 56



The Spanish claim to have the highest levels of difficulty in understanding both the nutritional claims on packaging and labelling on food.



Gluten free products are less popular in terms of level of purchase than 'free from' products. Almost half of all grocery shoppers have bought 'free from' food products. 57



Purchases of gluten free products are highest in Spain and the US. Spain ranks first for purchases of 'free from' food and are considerably ahead of all of countries when it comes to interaction with these products.

# TAKEAWAYS

58



# # 1

## Relationship status: complicated

- Relationship with food becoming more negative. Confidence has declined.
- Popularity of scratch cooking unaffected by lower positivity.
- Efforts to build relationship with food evident via classes & entertaining.



# #2

## Food in conflict

- High demand for food that is easy, quick and convenient.
- Use of ready prepared/ convenient foods have strong foothold in households.
- Endeavours to eat healthy, maintain a balanced diet & limit fast food are being made.
- Strong underlying concerns regarding childhood obesity.





# #3

## Healthy endeavours

- Eating more healthy than before and rising sense of healthiness.
- Extremely strong relationship with 'low fat' options and high consideration given to calories.
- Associates healthy options with limitations yet high willingness to pay more.
- Seeking help from manufacturers.



# #4

## Food: information & confusion

- High levels of difficulty in understanding nutritional information and food labelling.
- Yet, high tendency to search for specific food information (nutritional information / quality symbol / country of origin).





## #5 Offline/online errands

- More concerned with quality than value for money or price.
- Recognition of good customer service as premium differential.
- Considered & thoughtful grocery shopper.
- Relatively popular online grocery shopping dynamic.
- Strong inclination to use technology to enhance food decisions.



# #6

## Environment off the radar

- Awareness of food terminology is relatively weak.
- Current propensity to purchase foods that embrace environmental concepts is low.
- More traditional concepts (i.e. Fair Trade) carry most weight.





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