



## Covid-19 crisis effect on out-of-home catering FAP consumption in France

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### Introduction

In France, Out-Of-Home Catering (OOHC) consumption of Fishery and Aquaculture Products (FAP) is actually very little explored in the literature, due to a lack of available data. OOHC expenditures on FAP purchases amounted to 1 942 million euros in 2017 (of which 75% in commercial catering and 25% in collective catering) according to FranceAgriMer. The pandemic has heavily affected the OOHC sector through extended closures.

### Objectives

The project COPECO sought to understand the OOHC FAP consumption motivations and behaviours in France in the interest of evaluating the various impacts of the pandemic on this sector. The work focuses on general OOHC FAP consumption, followed by a focus on salmon and cod, two of the most consumed species in France, both at home and in the OOHC sector. It should be noted that these two species are not or only slightly produced in France (0% salmon and 6% cod according to Lucas et al. (2021)).

### Methodology

Two waves of online surveys were conducted by Kantar (resp. April and October 2021) among FAP consumers were used. Each survey counted 1 500 individuals, representative of the French population (age, gender, occupation, living place, etc.). The respondents of each survey were divided in two, in order to specifically answer one of the two considered species (salmon or cod) in addition to their general FAP consumption.

### Results

#### State of the art of pre-Covid-19 crisis OOHC consumption in France:

24% of individuals reported consuming FAP at least once a month in collective catering and 37% at least once a month in commercial catering. Compared to home consumption, where 80% of individuals reported consuming FAP at least once a month, consumption in OOHC was much less frequent. Over the two survey waves, 15% of individuals never consumed in commercial catering and 57% never in collective catering.

Regular FAP consumers in commercial catering are often regular FAP consumers in collective catering and *vice versa* (Table 1). Furthermore, the frequency of FAP home consumption is more strongly correlated with commercial catering consumption than with collective catering consumption.

Table 1: Correlation matrix of FAP consumption frequency by location

	Collective catering	Commercial catering
At-Home	0,1***	0,24***
Collective catering	-	0,44***

Waves 1 and 2, 2 998 obs, source: COPECO-COVID-Norway-DEFIPEL, 2022

#### Effect of Covid-19 restrictions on OOHC FAP consumption:

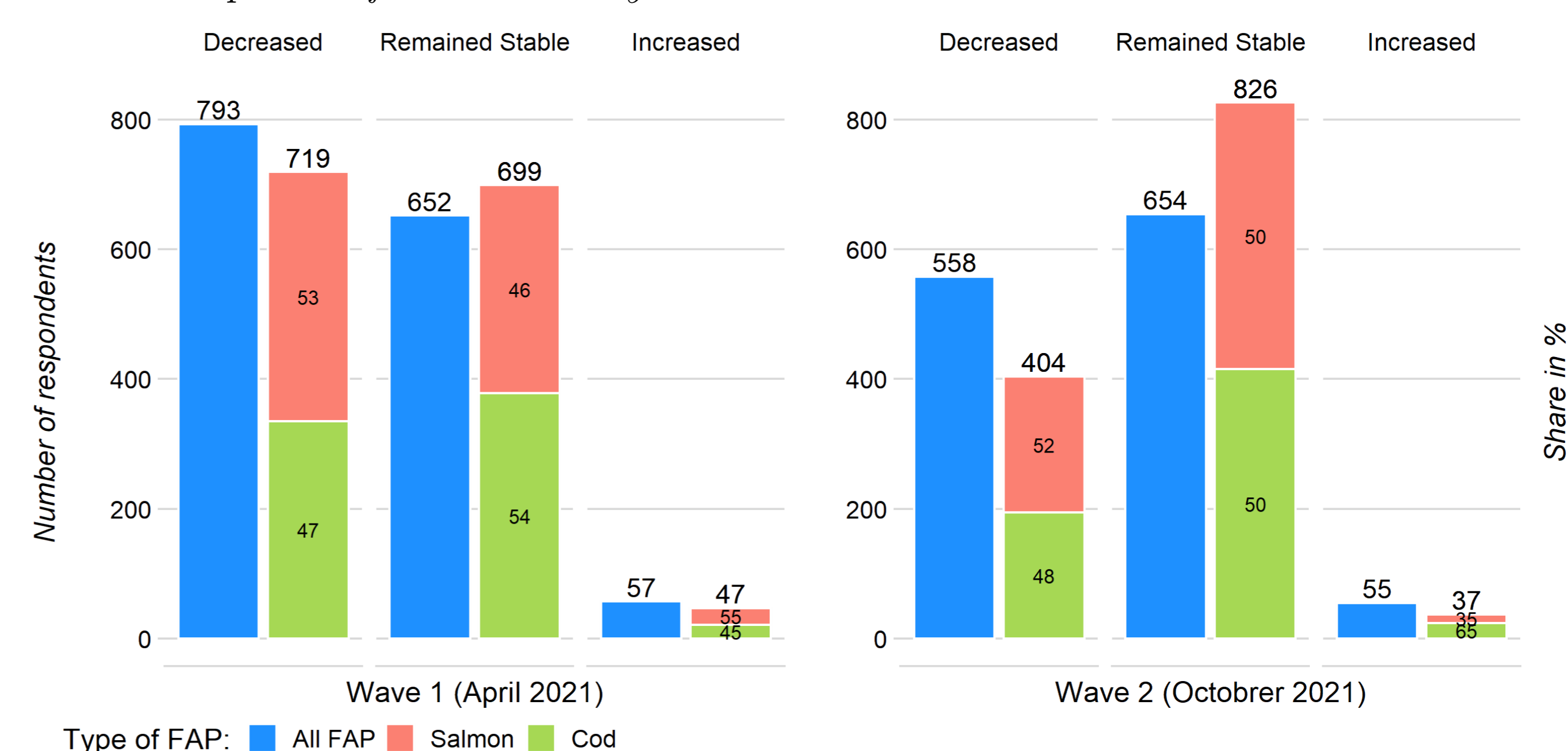
The vast majority of respondents stated that their OOHC consumption had decreased or had remained unchanged, either in general (all FAP) or if salmon and cod were considered (Fig. 1). Consequently, the pandemic has strongly affected the OOHC FAP consumption. However, a notable change in the distribution of these results can be observed between the two waves. Indeed, when asked in October 2021 (excluding restrictions) about their behaviours during the restriction periods, fewer respondents stated that their consumption in commercial catering had decreased, compared to those questioned in April 2021. This effect is also observed for salmon and cod consumption in commercial catering (Fig. 1). Thus, the end of the restriction periods as well as the reopening of restaurants seems to bias individuals' retroactive perception of this matter.

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Figure 1: Changes in consumption by type of FAP in commercial catering during the restriction periods for both survey waves



Wave 1 and 2, source: COPECO-COVID-Norway-DEFIPEL, 2022

**OOHC Consumption Considerations:** When asked more specifically about their OOHC FAP consumption, respondents tend to consider price as the first choice criterion for FAP consumption in commercial catering. It should also be noted that 81% of consumers are paying attention to the species they consume in commercial catering (Table 2). Conversely, 19% of those consuming in commercial catering do not know or pay attention to the species they consume. The characteristics of the products consumed in the catering industry, in general, or specifically salmon and cod, are of interest only to a small proportion of the respondents. Only 30% were concerned with the geographical origin of the product (all FAP) and 32% with the production methods. Therefore these results highlight two characteristics of FAP consumption in commercial catering: a relative indifference of consumers to the product they consume and/or a lack of transparency from commercial catering (Table 2). Yet these pieces of information are considered important by the consumer (Eurobarometer, 2021).

Table 2: Distribution of responses according to FAP consumption considerations in commercial catering for wave 2 (in %)

	Type of FAP	Attentive	Non-Attentive	Lack information
Species	All FAP	81	11	8
	Salmon	81	11	8
Production method	All FAP	32	30	38
	Salmon	32	30	38
Origin	All FAP	30	41	29
	Salmon	34	31	34
	Cod	36	29	35
Production sustainability	All FAP	28	33	39
	Salmon	20	40	40
	Cod	20	38	42
Label	All FAP	-	-	-
	Salmon	24	44	32
	Cod	25	42	34

Wave 2, 1 198 obs (All FAP), 534 obs (Salmon) and 525 obs (Cod)  
source: COPECO-COVID-Norway-DEFIPEL, 2022

### Conclusion

OOHC FAP consumption is less dominant than FAP home consumption but appears to be complementary. Although it is more occasional and has different characteristics, the price also plays a determining role. It appears that the production methods, labels, sustainability, and origin of products consumed in commercial catering are of interest to only a small proportion of FAP consumers (around 1/3 on average). However, a similar proportion deplores a lack of information by commercial catering. These two successive survey waves complemented the available data available in the FranceAgriMer reports.

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