



Traçabilité & Consommateurs Baromètre Monde

GS1 & Trace one

trace  one

The global language of business

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A Contexte & Objectifs

Contexte & Objectifs

- ▶ GS1 réalise une nouvelle vague du baromètre annuel sur la traçabilité auprès d'individus résidants en France, au Royaume-Uni, aux Etats-Unis, en Australie, au Brésil, en Afrique du Sud, en Chine et en Russie.
- ▶ L'objectif est de recueillir leur perception et leurs attentes à l'égard de la traçabilité, tout en mesurant leur niveau de connaissance des problématiques afférentes.
- ▶ La première vague du baromètre ayant été réalisée en France et au Royaume-Uni, nous pourrons appréhender l'évolution des résultats depuis novembre 2006.



B

Méthodologie









- ▶ Étude quantitative réalisée en ligne auprès d'un échantillon représentatif de la population nationale âgée de 15 ans et plus des pays suivants : France, Royaume-Uni, Etats-Unis, Brésil, Australie, Afrique du Sud, Chine et Russie.

Au final, 4344 individus ont été interrogés, dont :

FRANCE	504
ROYAUME-UNI	538
USA	565
AUSTRALIE	538
AFRIQUE DU SUD	509
BRÉSIL	638
CHINE	549
RUSSIE	503

- ▶ Mode d'interrogation: L'échantillon a été interrogé en ligne sur système Cawi.
- ▶ Date du terrain: les interviews ont été réalisés du 19 octobre au 05 novembre 2007.
- ▶ Significativités : les différences significatives entre pays sont indiquées par le symbole suivants:

- Redressement : Les 8 échantillons ont été redressés afin d'être représentatifs de la structure de chaque pays sur les critères suivants :

								
Sexe								
Hommes	48%	48%	50%	50%	47%	49%	54%	46%
Femmes	52%	52%	50%	50%	53%	51%	46%	54%
Age								
15-24 ans	23%	12%	11%	18%	17%	31%	22%	52%
25-39 ans	31%	28%	28%	28%	29%	35%	37%	37%
40-54 ans	24%	27%	26%	33%	24%	22%	24%	9%
55 ans et plus	22%	33%	35%	21%	30%	11%	17%	2%
15-24 ans	23%	12%	11%	18%	17%	31%	22%	52%

Région



Ile de France 19%

Nord 7%

Est 9%

BP Est 8%

BP Ouest 10%

Ouest 13%

Sud-Ouest 11%

Sud-est 12%

Méditerranée 12%



UKC - North East 4%

UKD - North West 11%

UKE - Yorkshire and Humberside 8%

UKF - East midlands 7%

UKG - West Midlands 9%

UKH - East of England 9%

UKI - London 12%

UKJ - South East 14%

UKK - South West 8%

UKL - Wales 5%

UKM - Scotland 9%

Northern Ireland 3%



Northeast 19%

South 36%

Midwest 23%

West 22%



North 6%

Northeast 29%

Southeast 44%

South 15%

West-centre 7%



New South Wales 33%

Victoria 25%

Queensland 20%

South Australia 8%

Western Australia 10%

Tasmania 2%

Northern Territory 1%

Australian Capital Territory 2%

Statut d'activité / Profession



Artisans, commerçants	5%
Cadres, prof, Intel, Supérieures	17%
Professions intermédiaires	15%
Employés	19%
Ouvriers	12%
Retraités	8%
Autres inactifs	24%



TOTAL EMPLOYED	65%
Managerial/ professional	22%
Tech,/ sales/ administrative	18%
Service employee	8%
Precision production worker	8%
Operators/ fabricators	9%
Farming, forestry, fishing	2%
UNEMPLOYED	6%
Not in labour force	29%



Legislators, senior officials and managers	3%
Professionals	11%
Technicians and associate professionals	4%
Clerks	10%
Service workers, shop and market sales workers	2%
Skilled agricultural and fishery workers	1%
Craft and related trades workers	1%
Plant and machine operators and assemblers	1%
Elementary occupations	1%
Unemployed	20%
Retired	12%
Scholar / Student	31%
Other not economically active	4%

Niveau de revenu



Less than 13,800 Pounds	21%
Between 13,800 and 19,999 Pounds	23%
Between 20,000 and 26,599 Pounds	16%
Between 27,600 and 34,499 Pounds	10%
Between 34,500 and 41,399 Pounds	11%
Between 41,400 and 48,299 Pounds	5%
Between 48,300 and 55,199 Pounds	4%
Between 55,200 and 62,099 Pounds	5%
62,100 and more	5%



Less than \$7,800	16%
Between \$7,800 and \$12,999	15%
Between \$13,000 and \$20,799	14%
Between \$20,800 and \$31,199	15%
Between \$31,200 and \$41,599	12%
Between \$41,600 and \$67,599	17%
Over \$67,600	11%





Menos de R24000	39%
Entre R24001 e R51000	34%
Entre R51001 e R120000	22%
Mais de R120001	5%




Less than R 800	34%
Between R 801 and R1600	23%
Between R 1601 and R 3200	17%
Between R 3201 and R 6400	15%
More than R 6400	11%

Autres critères de redressement








Zone de résidence

		
Urbains	44%	73%
Ruraux	56%	27%

Origine ethnique

	
Black African	77%
Coloured	9%
Indian/Asian	3%
White	11%

- ▶ Redressement : Enfin, un poids a été appliqué à chaque pays. Le choix d'appliquer un poids identique à tous les pays sondés se justifie par la présence de la Chine dans l'échantillon
(un poids réel aurait écrasé les opinions des individus des autres pays).
- ▶ Ainsi, la même importance est accordée à chaque pays :

	12,5%
	12,5%
	12,5%
	12,5%
	12,5%
	12,5%
	12,5%
	12,5%

C Principaux Résultats

Main Results 1/2

- ▶ Traceability reaches a rather good level of awareness all around the world: from 22% in Russia to 86% in France, with close levels within the Anglo Saxon countries (between 25 and 31%). China and South Africa reach good levels as well: 50 and 45%.
- ▶ Traceability plays as a guarantee of products quality for the consumers. The quality issue is even quoted before the security consideration (offers reassurance about quality, withdraw dangerous products, etc.).
- ▶ Medication and health represent the prior sector to apply traceability. While Anglo Saxons are more interested in an application of traceability on people, other respondents are considering food traceability as a priority (except South Africa).
- ▶ People express a particular interest about the information connected with the origins, the raw materials and the ingredients of products.
- ▶ Manufacturers are considered as the main guarantors of products quality, much more than distribution and retail industry (in case of a problem 71% of people would say the manufacturer is the first responsible). Retailers get a high level of confidence, and people trust the biggest establishments (hyper or super markets).
- ▶ The main limit of traceability is the extra costs passed on to both consumer and manufacturer. The fear of living in a society where everything is monitored is the third kind of risks perceived mostly in Anglo Saxon countries.

Main Results 2/2

- ▶ Beyond the real interest showed about traceability, respondents express huge expectations about the information displayed on product labels. People don't express a high level of satisfaction about information displayed on product labels and expect a lot about getting more information (especially about the origins and the detailed list of ingredients). This is particularly strong in countries like China, Russia and Brazil, countries where people agreement about paying a few cents more for traceability is high.
- ▶ Product packaging represents the principal medium to be informed (even if an important part of respondents agrees with the fact of consulting the Internet or their mobile to get information).
- ▶ Labels that ensure the product comply with traceability standards are the best way to reassure people, more than detailed reports of all the stages of the traceability process .
- ▶ A respondent out of 5 is aware of RFID technology. Nevertheless this global result is mostly due to the level of awareness in China : 7 Chinese people out of 10 (the current identification program set up by the government as the purchase behaviors in that country might explain such a result).
- ▶ According to the interviewees, the main application is the medical area (patients and treatments identifications). Secondary, it is the assurance of the product authenticity (avoid counterfeiting).
- ▶ RFID collects great perceptions about its development with 85% believing that RFID labeling is likely to develop a lot or moderately. A high part don't perceive any fear or risks connected with RFID labeling (Overall, 33% declared it is something that presents huge advantages and should be developed).



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Résultats

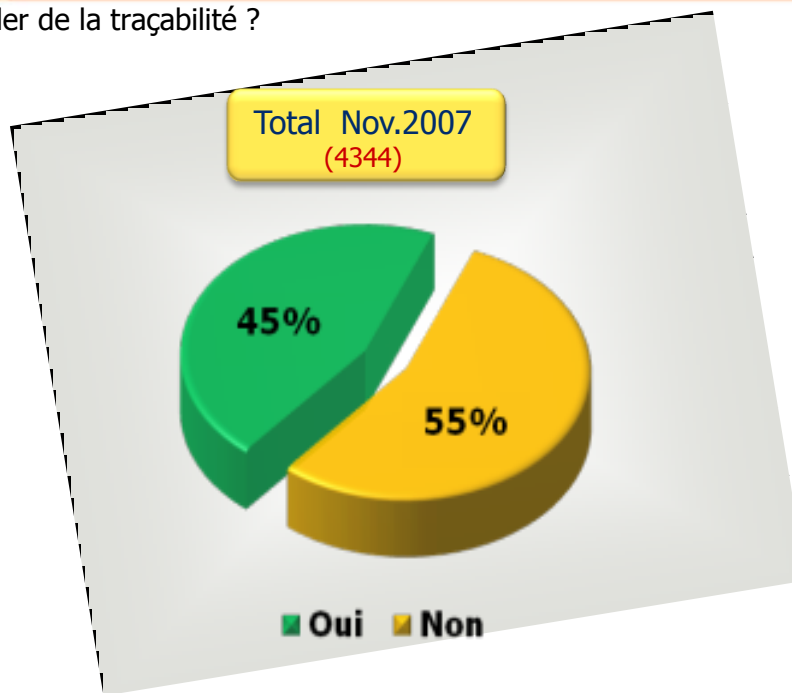
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Connaissance et définition de la traçabilité

- ▶ The level of awareness of traceability changes according to the region considered:
 - ▶ The highest levels are recorded in France (86% have heard about traceability) and Brazil (70%). As one of the main agricultural country in the world, Brazil has already set up traceability policies for many years, and especially since European Union issued regulations on imported agricultural products (identification, recording and follow-up of the animal).
If awareness is high in those countries, the ability of French people and Brazilians to define traceability differs: while a majority of French respondents connect this concept to the idea of tracing back product through the whole supply chain (from the producer to the consumer), Brazilians only mentioned the idea of tracing back without further precisions. Those countries both consider that traceability is discussed "enough" or "too much".
 - ▶ The lowest awareness level concerns Russia where only 22% of the respondents have ever heard about traceability.
 - ▶ Between those extreme results, we can notice that Anglo-Saxon countries got similar awareness levels: 31% in the UK, 27% in the USA, and 26% in Australia. Here, we can underline the lack of communication with almost one respondent out of 3 declaring traceability is "not at all" discussed although the definitions that are spontaneously given are more precised in those countries. We can notice that the idea of applying traceability on people ("Tracking personal identity/data ») is more often quoted (especially in the USA with 15% of quotations vs. 5% overall).
 - ▶ In China, 50% of people have already heard about traceability, and 45% in South-Africa. Chinese and South African respondents are more inclined to give wrong or neutral definitions. 93% of Russians estimate that traceability is "not enough" or "not at all" discussed.

Notoriété assistée

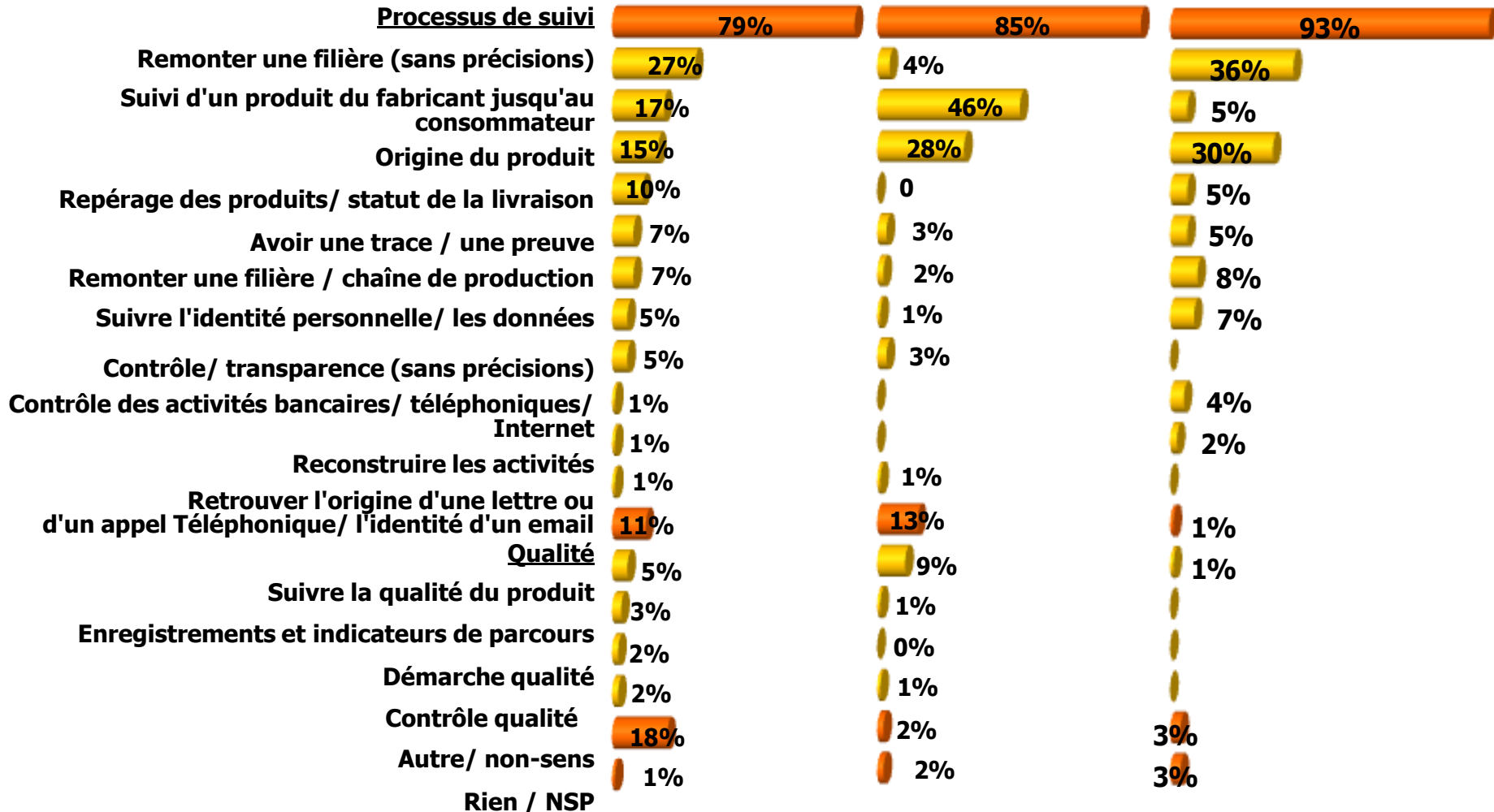
Q1 : Avez-vous déjà entendu parler de la traçabilité ?









Oui	86%	-3	31%	-4	27%	26%	45%	70%	50%	22%
Non	14%		69%		73%	74%	55%	30%	50%	78%

Q2 : Pour vous, la traçabilité, c'est quoi ?

Total Connaissent (1955)

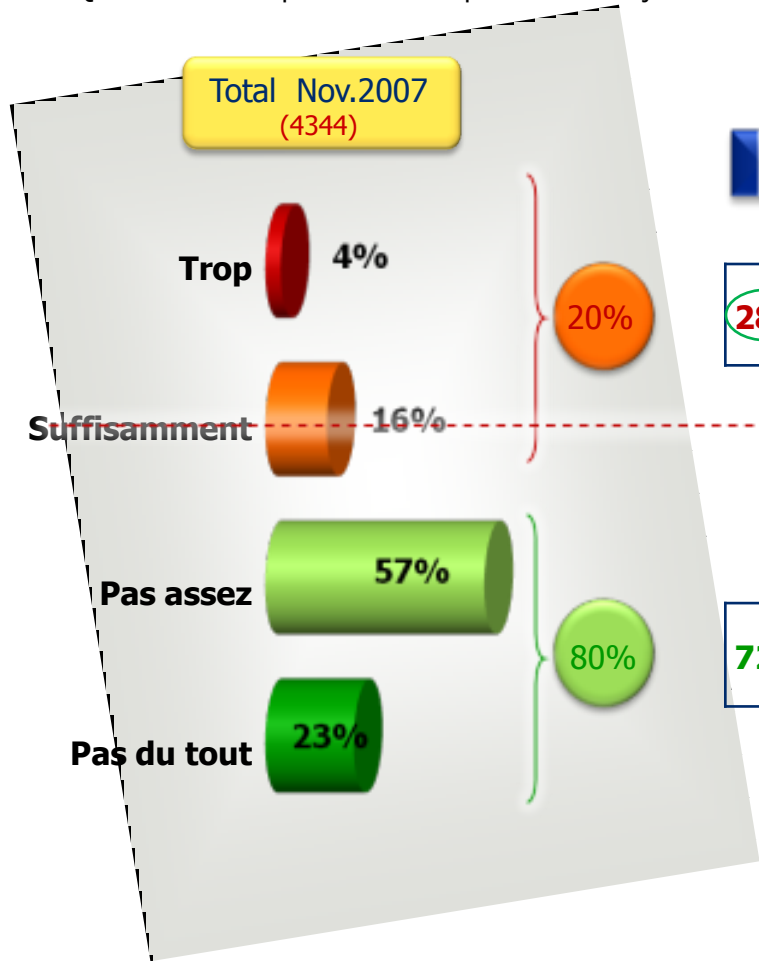


Q2 : Pour vous, la traçabilité, c'est quoi ?

	Total Connaissent (1955)						
Processus de suivi	79%	79%	94%	82%	92%	50%	45%
Remonter une filière (cas général)	27%	32%	45%	56%	45%	3%	18%
Suivi d'un produit du fabricant jusqu'au consommateur	17%	4%	4%	8%	4%	19%	2%
Origine du produit	15%	14%	5%	4%	9%	16%	-
Repérage des produits/ statut de la livraison	10%	0%	21%	8%	31%	3%	-
Avoir une trace / une preuve	7%	6%	15%	5%	12%	12%	1%
Remonter une filière / chaîne de production	7%	2%	4%	7%	11%	15%	-
Suivre l'identité personnelle/ les données	5%	15%	12%	2%	12%	-	-
Contrôle/ transparence (cas général)	5%	-	-	1%	11%	1%	23%
Contrôle des activités bancaires/ téléphoniques/ Internet	1%	7%	6%	0%	1%	-	0%
Reconstruire les activités	1%	3%	4%	1%	2%	1%	1%
Retrouver l'origine d'une lettre ou d'un appel Téléphonique/ l'identité d'un email	1%	3%	1%	-	1%	-	-
Qualité	11%	1%	2%	13%	9%	24%	8%
Suivre la qualité du produit	5%	-	1%	4%	0%	12%	7%
Enregistrements et indicateurs de parcours	3%	1%	1%	4%	3%	12%	0%
Démarche qualité	2%	1%	-	3%	5%	1%	1%
total quality control	2%	-	1%	3%	2%	2%	1%
Autre/ non-sens	18%	9%	5%	10%	19%	41%	79%
Rien / NSP	1%	10%	-	-	0%	-	1%

Informations/Communication sur la traçabilité

En fait, la traçabilité consiste à « Pouvoir suivre un produit depuis le choix des matières premières jusqu'à la livraison ».
 Q3 : Diriez-vous que l'on entend parler de la traçabilité ?



Evolution Oct. 2006	Evolution Oct. 2006								
28%	+2	15%	+3	13%	10%	26%	41%	21%	4%

72%	-2	85%	-3	87%	90%	74%	59%	79%	96%

2

Utilités et priorités de la traçabilité

- ▶ Traceability plays as a guarantee for 80% of the consumers (spontaneous quotations).
 - ▶ It represents a product quality insurance for 26% of respondents. It helps tracking and following the products for 22% of people, and it guarantees transparency to the consumers (16%).
 - ▶ While Brazilians are over represented amongst people that talk about “transparency” or “security for consumers”, Australians and South African people are more inclined to talk about “Tracking/following the product » without any further precisions.
- ▶ With a prompted list of main uses, 56% of the sample estimate that traceability “offer reassurance as to the quality of products that people purchase”. This concern more specifically Russians (67%), but also Australians and Brazilians (61%).
- ▶ If 45% of investigated people quote “withdraw products should they prove to be dangerous », French respondents are 62%. The last events linked with defective products from Asia (tools, cosmetics, electrical devices) might explain that worry. Overall, the EU reported more than 900 China made goods as dangerous.
- ▶ The third use of traceability is the idea of «providing information on every manufacturing stage » with 41% of the quotations. South Africans are 53%, Americans 49% and British 48%. “To have precise information on raw materials and their origin” is the fourth item quoted with 38% of people. Respondents from the countries where traceability is most famous seem to be more concerned as 54% of French and 52% of Brazilians quoted that issue.
- ▶ The topic of the sustainable development is over represented in China and in the UK (23 and 20% quote « To offer guarantees as to sustainable development or fair trade” vs. 15%).
- ▶ 29% of people quoted “to fight counterfeiting” as a priority, especially in the countries that are prone to counterfeiting (China 35% and Russia 64%).

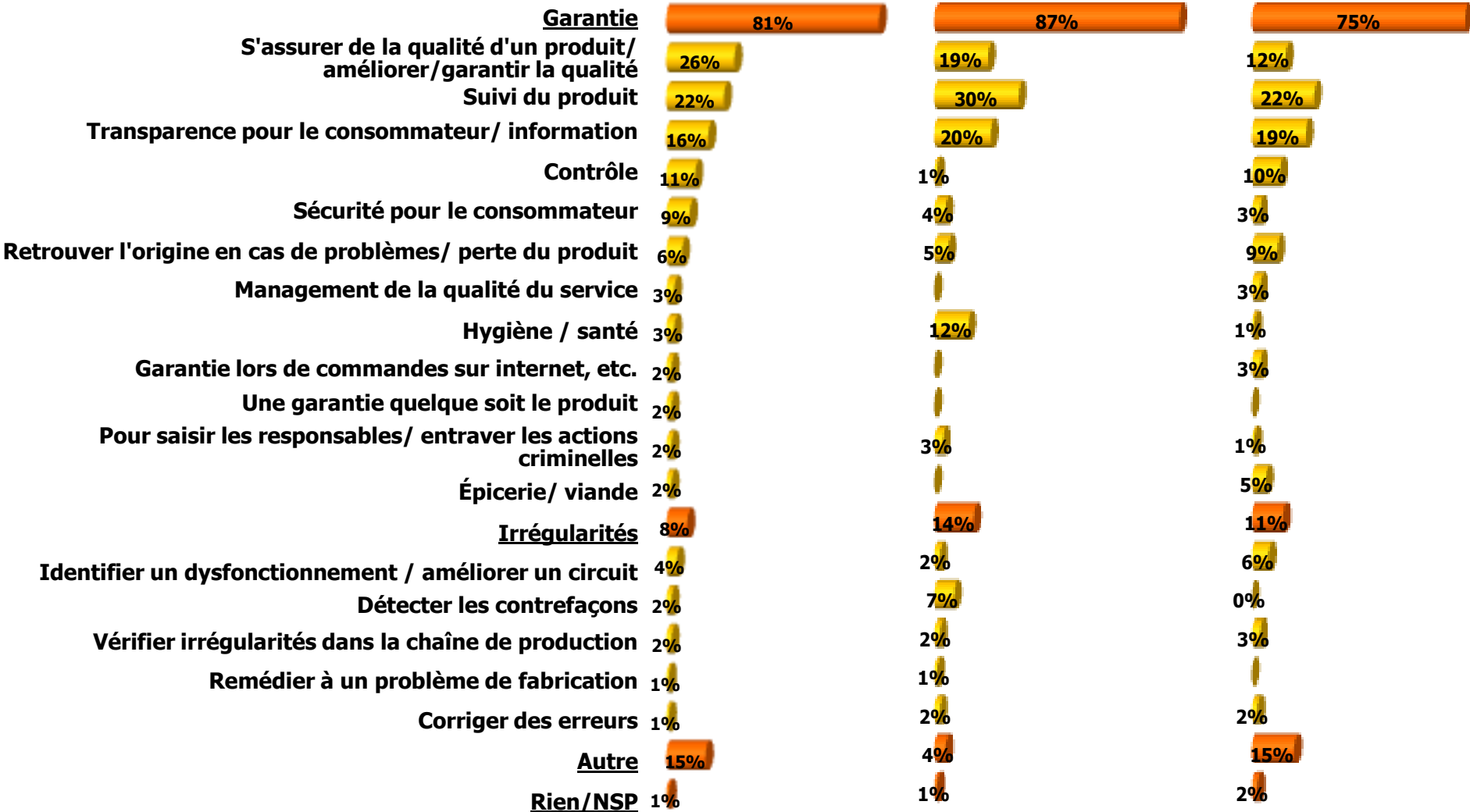
- ▶ Medication and health appear as the priority domain for traceability (79%), especially in the emergent countries (91% in Russia, 86% in Brazil, and 85% in China).
 - ▶ This result in China can be explained by the crisis of fake pills and more generally to the problem of counterfeiting. Indeed, in 2001, the Chinese government closed 1300 medication factories and explained that fake medicines has been responsible for the death of 192 000 people.
- ▶ Secondary, we notice that the different kinds of food products are all quoted before the other types of products: 70% of people perceived meat as a priority. Meat appears as the main issue in France (89%). On the contrary, only 49% have chosen this type of product in South Africa (a country where meat takes a huge place in food habits).
- ▶ 67% of the interviewees considered the dairy products as a priority for traceability. This issue concerns 84% of the Russian respondents, 78% of French people and 73% of Brazilians.
- ▶ Fresh and frozen products, ready-cooked or ready-to-eat meals, and sea products are a priority for 59, 59, and 54% of the respondents.
- ▶ Tracing Dependent or dangerous individuals is a priority for a respondent out of two. Once more, Anglo Saxon countries attach more importance to that issue : 65% of British, 58 and 57% of Australians and Americans.
- ▶ In South Africa, food products are under represented. Transportation, cosmetics, textiles and luxury goods are more quoted than on the average.

- ▶ In terms of priority of information, logically, the more information is directly concerning the consumer and the more it is defined as a priority : The list of ingredients and list of allergens are the first information needed (67 and 66%). This concerns 83% of Russians and 72% of French people.
- ▶ Then, information connected with the origins of the goods are quoted: the origins of raw materials are quoted by 56% of the people and 47% define the product's place of origins as a priority information.
- ▶ Industries get a high level of confidence as the items connected with the manufacturing chain appear at the end of the list : The name of the manufacturer of the product (the brand) (33%), the path followed by the product (27%), in the logistics chain, the various intermediaries in the manufacturing chain (26%).
- ▶ Information relating to GMOs is a priority for 43% of people. It is over represented in France (59), Brazil (66%) and China (55). In those countries this issue has taken a growing importance in the last years : GMOs have been legalized in Brazil in 2003 and China authorized the transgenic culture of rice the same year.
On the contrary, places where GMOs have been cultivated for many years are less interested in that issue: Only 19% in the USA where GMOs cultures exist for a few decades and where they represent 49 million of hectares).

Utilités de la traçabilité

Q4 : Selon-vous, à quoi peut servir la traçabilité ?







Total Nov.2007 (4344)



Utilités de la traçabilité

Q4 : Selon-vous, à quoi peut servir la traçabilité ?

Total Nov.2007 (4344)

								
	Garantie	81%	77%	84%	83%	95%	69%	77%
S'assurer de la qualité d'un produit/ améliorer/garantir la qualité	26%	17%	25%	16%	9%	37%	65%	
Suivi du produit	22%	22%	36%	35%	7%	14%	9%	
Transparence pour le consommateur/ information	16%	13%	15%	8%	46%	2%	7%	
Contrôle	11%	16%	17%	25%	4%	4%	11%	
Sécurité pour le consommateur	9%	4%	4%	3%	38%	10%	2%	
Retrouver l'origine en cas de problèmes/ perte du produit	6%	9%	6%	4%	2%	11%	-	
Management du service qualité	3%	2%	6%	4%	2%	5%	0%	
Hygiène / santé	3%	2%	0%	1%	2%	-	2%	
Garantie lors de commandes sur internet, etc.	2%	6%	9%	0%	4%	0%	-	
Une garantie quelque soit le produit	2%	1%	0%	-	11%	-	0%	
Pour saisir les responsables/ entraver les actions criminelles	2%	2%	1%	3%	1%	1%	0%	
Épicerie/ viande	2%	4%	1%	0%	4%	-	-	
	Irrégularités	8%	13%	10%	6%	2%	5%	8%
Identifier un dysfonctionnement / améliorer un circuit	4%	7%	7%	4%	2%	-	6%	
Détecter les contrefaçons	2%	-	-	-	-	1%	5%	
Vérifier irrégularités dans la chaîne de production	2%	4%	2%	1%	-	2%	0%	
Remédier à un problème de fabrication	1%	2%	-	-	0%	2%	0%	
Corriger des erreurs	1%	1%	2%	0%	0%	-	-	
	Autre	15%	12%	7%	13%	11%	30%	25%
	Rien/NSP	1%	1%	1%	-	0%	-	0%

Perception des applications prioritaires de la traçabilité

Q5 : Voici des phrases qui peuvent décrire ce à quoi peut servir la traçabilité.
 Quelles sont pour vous, parmi cette liste, les trois applications prioritaires pour la traçabilité ?

Total Nov.2007
 (4344)



Applications prioritaires de la traçabilité

Q5 : Voici des phrases qui peuvent décrire ce à quoi peut servir la traçabilité.
 Quelles sont pour vous, parmi cette liste, les trois applications prioritaires pour la traçabilité ?



	Total	France	UK	USA	Australia	South Africa	Brazil	China	Russia
Rassurer sur la qualité des produits que l'on achète	56%	47%	46%	56%	61%	55%	61%	58%	67%
Retirer des produits qui pourraient s'avérer dangereux	45%	62%	46%	39%	40%	39%	31%	47%	55%
Avoir des informations sur toutes les étapes de fabrication	41%	38%	48%	49%	44%	53%	40%	39%	13%
Avoir des informations précises sur les matières premières et leur origine	38%	54%	42%	34%	31%	22%	52%	29%	40%
Mieux connaître la composition des produits	32%	42%	31%	30%	30%	32%	32%	30%	24%
Lutter contre la contrefaçon	29%	21%	25%	19%	19%	18%	29%	35%	64%
Avoir des garanties sur le développement durable ou le commerce équitable	15%	8%	20%	8%	18%	18%	14%	23%	10%
Aider au choix de produits « bons pour la santé »	15%	12%	8%	12%	17%	25%	13%	12%	18%
Suivre des personnes dépendantes ou dangereuses	7%	4%	6%	10%	5%	5%	10%	15%	1%
Apporter des services supplémentaires dans la vie quotidienne	5%	1%	4%	3%	2%	12%	8%	8%	4%

Intérêts prioritaires de la traçabilité

Q8 : Parmi les éléments que je vais vous citer, vous me direz pour chacun si la traçabilité représente un intérêt prioritaire, important ou secondaire ?



Intérêts prioritaires de la traçabilité

Q8 : Parmi les éléments que je vais vous citer, vous me direz pour chacun si la traçabilité représente un intérêt prioritaire, important ou secondaire ?

■ Prioritaire

Total		Evolution Oct. 2006		Evolution Oct. 2006						
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	Total	France	Evolution Oct. 2006	UK	Evolution Oct. 2006	USA	Australia	South Africa	Brazil	China	Russia
Les médicaments, la santé	79%	80%	-5	74%	-3	71%	78%	63%	86%	85%	91%
La viande	70%	89%	+1	67%	=	73%	63%	49%	74%	67%	75%
Les produits laitiers	67%	78%	+1	53%	-3	61%	57%	65%	73%	68%	84%
Les produits frais et surgelés	59%	74%	-5	45%	-4	56%	53%	58%	67%	62%	60%
Les plats cuisinés ou prêts à consommer	59%	67%	-1	50%	+2	52%	51%	63%	61%	60%	70%
Les produits de la mer	54%	78%	+2	43%	=	47%	58%	43%	64%	52%	49%
Les fruits et légumes	51%	56%	+6	41%	=	57%	50%	44%	59%	54%	48%
Les produits alimentaires sous marque de magasin / distributeur	51%	61%	NP	39%	NP	46%	45%	55%	61%	45%	53%
Les personnes dépendantes ou dangereuses	49%	42%	+5	65%	+2	57%	58%	53%	50%	43%	26%
Les produits cosmétiques	32%	25%	+2	18%	=	17%	26%	43%	30%	65%	32%
Les produits du commerce équitable	32%	39%	NP	38%	NP	25%	37%	33%	14%	25%	41%
Le courrier, les colis	28%	13%	-2	34%	-3	36%	48%	26%	38%	23%	6%
Le transport	27%	20%	+1	25%	+3	31%	23%	39%	36%	17%	29%
Le textile et les produits de luxe	15%	9%	+3	12%	+4	11%	14%	39%	14%	14%	5%









Priorité perçue des informations délivrées

Q13 : Pour chacune des informations que je vais vous citer, dites-moi si elle est pour vous prioritaire, importante ou secondaire en ce qui concerne la traçabilité ?



Priorité perçue des informations délivrées

Q13 : Pour chacune des informations que je vais vous citer, dites-moi si elle est pour vous prioritaire, importante ou secondaire en ce qui concerne la traçabilité ?

	Total	■ Prioritaire	 Evolution Oct. 2006	 Evolution Oct. 2006						
La liste des composants d'un produit	67%		72% +2	65% -3	66%	71%	60%	63%	55%	83%
La liste des allergènes	66%		70% +2	64% -2	66%	74%	61%	59%	67%	72%
La provenance de toutes les matières premières entrant dans la composition du produit	56%		68% NP	53% NP	54%	56%	45%	66%	57%	53%
Le lieu d'origine d'un produit	47%		54% +2	40% =	43%	59%	48%	56%	21%	59%
L'information sur les labels ou les normes	43%		32% -1	35% -2	39%	49%	58%	62%	49%	17%
L'information sur les OGM	43%		59% +2	36% -2	19%	41%	31%	66%	55%	34%
Le nom du fabricant d'un produit (la marque)	33%		26% =	28% -1	38%	44%	41%	42%	27%	23%
Le parcours du produit dans la chaîne logistique	27%		30% -3	20% -3	30%	26%	31%	31%	34%	19%
Les différents intermédiaires dans la fabrication du produit	26%		34% +2	22% +1	23%	23%	29%	36%	21%	19%

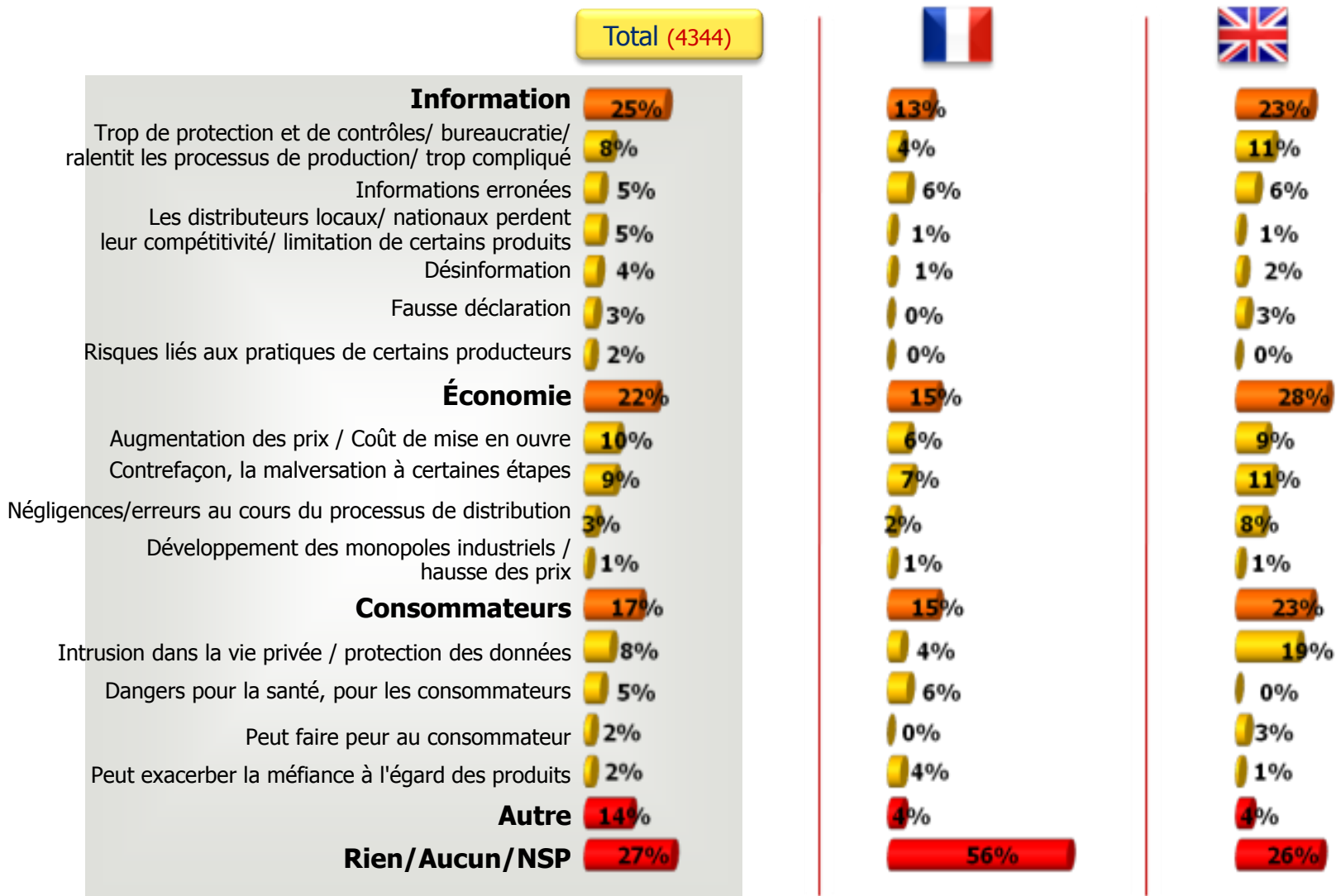
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Les risques perçues de la traçabilité

- ▶ The economical issues appear as the main risks according to the respondents:
 - ▶ First the cost of traceability passed on to the consumers (62% say it's the greatest risks of traceability). We notice that French are less prone to quote this issue (the interest they previously showed for traceability might explain that they are less reticent to the question of prices). This concerns 68% of Brazilians and 66% of Australian respondents.
 - ▶ Then, the cost as constraints for the manufacturer (53%). Here, the emerging countries are more sensitive: 71% in Russia, 66% in China, and 58% in South Africa (regulations and pricing are perceived as high constraints in that countries).
- ▶ The third risk is the fear of living in a society where everything is monitored (51%). This feeling is particularly shared in the UK (62%), in Australia and the USA (59%).
- ▶ Everything will be filed in huge data bases is quoted by 34% of people. We found again a lesser worry among Anglo Saxon respondents. Probably due to the higher level of control (and of individual freedom in those countries).
- ▶ This is also illustrated by the answers given on the topic of traceability applied to people: While 60% overall estimate that "it is something that presents certain advantages but should be controlled", this concern 68% of British, and 67% in both Australia and the USA.
- ▶ In China and South Africa, people are more open to this evolution with 48 and 46% that quote "It is something that presents huge advantages and should be developed".

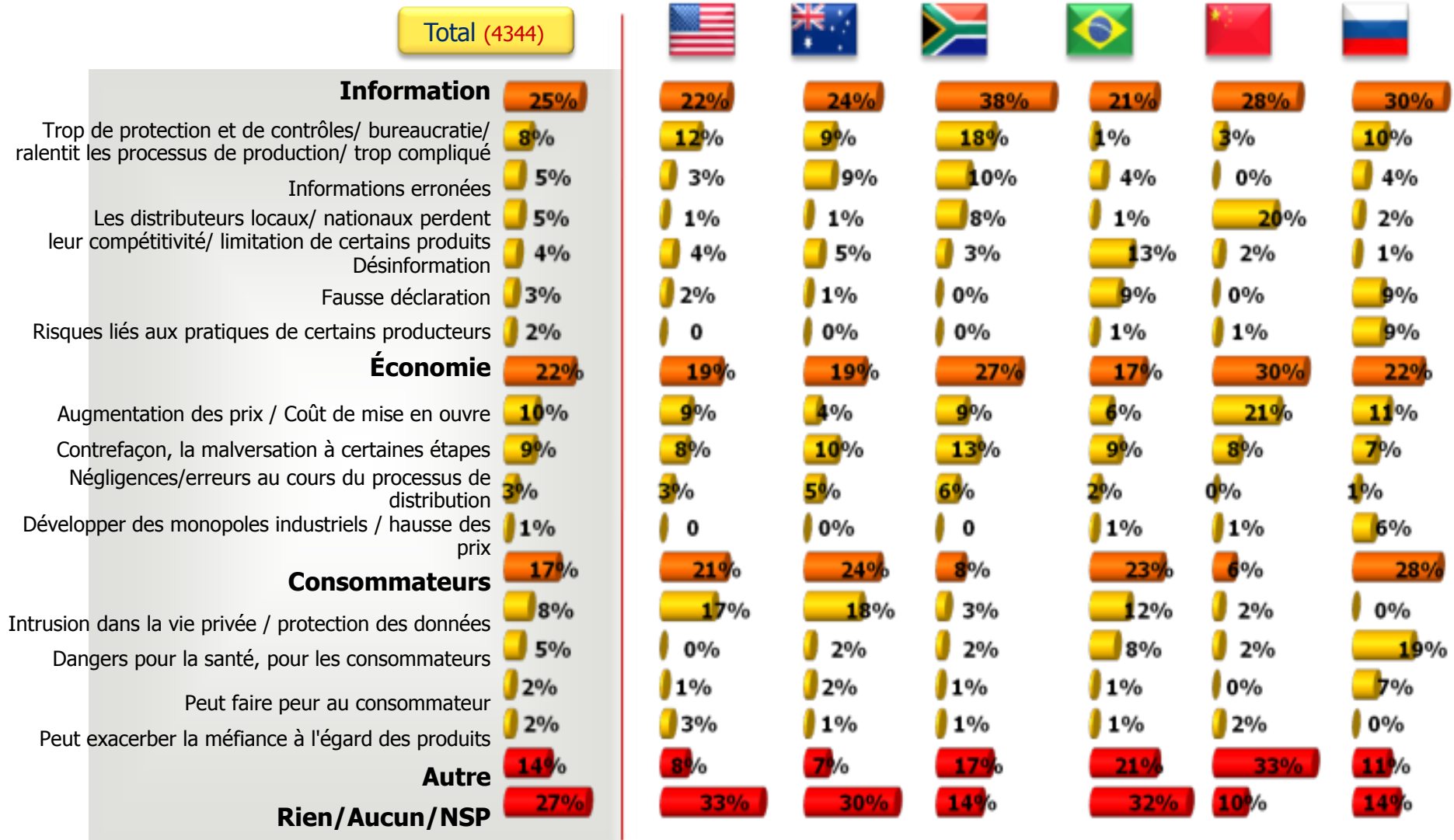
Les risques perçus

Q6 : Quels sont pour vous les risques liés à la traçabilité ?



Les risques perçus

Q6 : Quels sont pour vous les risques liés à la traçabilité ?











Perception des risques principaux liés à la traçabilité

Q7 : Voici des risques qui sont généralement évoqués. Quels sont pour vous, parmi cette liste, les trois risques les plus importants de la traçabilité ?



Perception des risques principaux liés à la traçabilité

Q7 : Voici des risques qui sont généralement évoqués. Quels sont pour vous, parmi cette liste, les trois risques les plus importants de la traçabilité ?

	Total	 Evolution Oct. 2006	 Evolution Oct. 2006						
Cela coûte cher au consommateur	62%	55% -3	64% -7	63%	66%	54%	68%	58%	65%
La traçabilité crée de nouvelles contraintes pour les fabricants	53%	58% -6	41% =	43%	43%	58%	47%	66%	71%
Nous allons vivre dans une société où tout est contrôlé	51%	51% +3	62% +5	59%	59%	55%	53%	39%	28%
Tout sera fiché dans d'immenses bases de données	34%	28% -8	36% -2	28%	34%	31%	30%	47%	35%
Cela crée un climat de peur, de paranoïa	28%	34% -6	31% -2	33%	28%	27%	32%	26%	14%
Le fait de tout savoir enlève la part d'imagination	18%	8% +1	18% +6	13%	16%	33%	19%	19%	16%
Tous les produits vont être identiques	15%	14% -1	10% -5	9%	10%	31%	16%	19%	10%

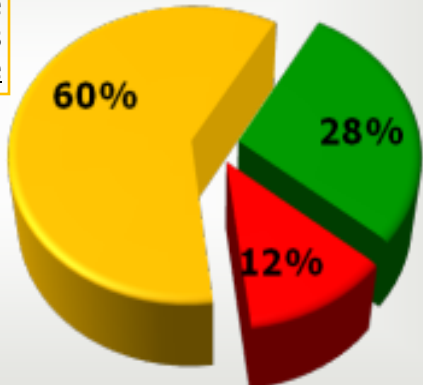
Perception de la traçabilité appliquée au personnes

Q9 : Qu'est-ce que la traçabilité appliquée aux personnes évoque pour vous ?

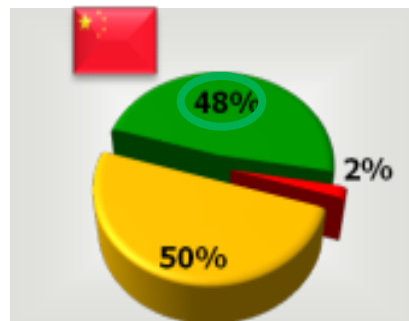
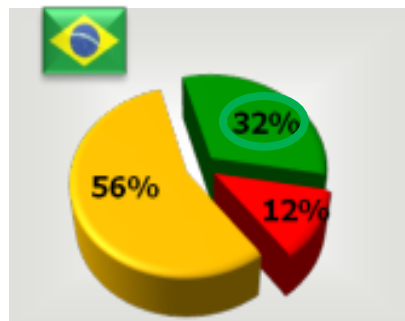
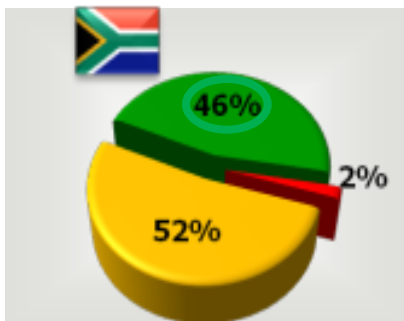
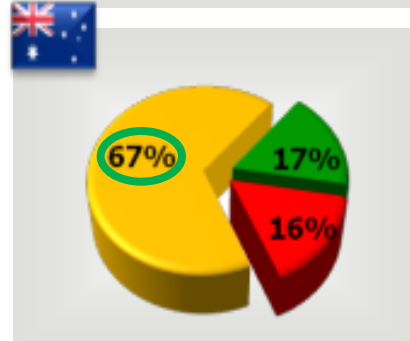
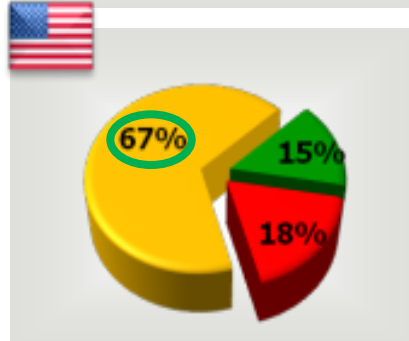
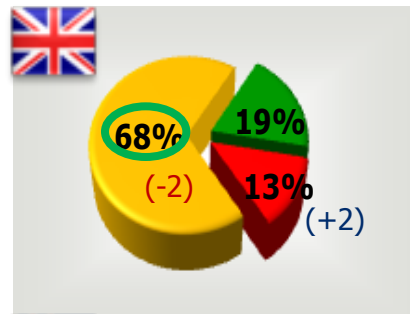
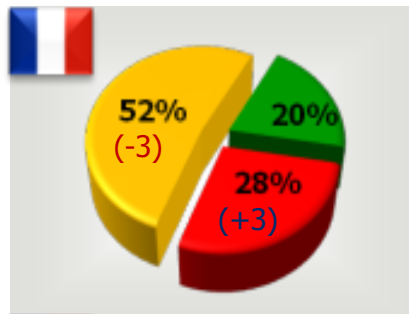
Total Nov.2007 (4344)

C'est quelque chose qui représente énormément d'avantages et devrait être développé

C'est quelque chose qui représente certains avantages mais devrait être contrôlé



C'est quelque chose qui m'effraie



4

Confiance,
responsabilités
et garanties

Synthesis / Confidence, responsibilities and guarantees (1/2)

- ▶ Whatever the country, people trust the most hyper or supermarkets (65% overall) while corner shops collect 15% of the answers and market stalls and mini-markets only 11% and 9%.
- ▶ In France, the levels of confidence are higher for the smallest types of commercial establishments (23% for market stalls), the hyper or supermarkets only collect 50% of confidence.
- ▶ Corner shops also get a high level of confidence in the USA, the UK and in Australia.
- ▶ Levels of confidence in South Africa, Brazil and China for the hyper and supermarkets are significantly over the average. The novelty of these establishments might explain that particular interest (Since mid of year 2007, Carrefour Group own more than 100 hypermarkets in China).
- ▶ If 61% of Russians trust the most supermarkets, they are 23% to declare they trust the most mini-markets. This can be explained by the low number of hypermarkets and the difficulty of middle-class population to access these kind of establishments (In 2001, less than 10% of Russians were purchasing their grocery courses in hyper or super markets (source Euromonitor from www.centreurope.org)). At the same time Russia represent the biggest grocery market of Europe (estimated at US\$ 58 Billions).

Synthesis / Confidence, responsibilities and guarantees (2/2)

- ▶ If the confidence levels to distribution are high, the first guarantor of traceability are the manufacturers (according to 63% of respondents, manufacturers should guarantee product traceability), before the retail industry (only 27% of quotations).
- ▶ We observe the same result when we ask people about the responsibility in case of a problem with a product : 71% estimate the manufacturer is the first accountant (only Russians and South Africans declare the retailer to be the main responsible).

We already underlined the bigger part played by the manufacturers (highest interest for the information connected with the origins of products (ingredients, raw materials), before the information about the various intermediaries).

- ▶ Public authorities represent the second guarantors in general (43%). Certainly due to political history, 53% of Chinese people estimate that they are the first guarantor (ex-aequo with the manufacturers). For the same historical reasons, we notice that only 18% of Russians trust the public authorities to guarantee traceability.
- ▶ 33% of respondents see the consumer associations as the first guarantor (especially in countries where they are not developed as China and Russia).
- ▶ Labels that guarantees that products comply with traceability standards represent the best way to reassure about the product quality (58% of quotations before the idea of providing a detailed report of all stages of the traceability process (33%)). British, Australians and South African respondents are over represented. Only Chinese declared they would be better reassured with a detailed report (56% vs. 36% for the label).

The easiness of looking at a logo must explain that greater interest for labels.

Habitudes en terme d'achat

Q11 : Vous arrive t-il souvent, parfois ou jamais ... ?

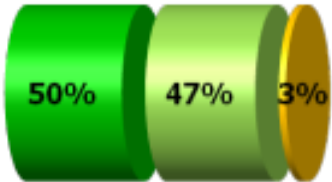
■ **Souvent** ■ **Parfois** ■ **Jamais**

Souvent

Total Nov.2007 (4344)

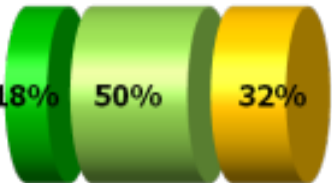


D'acheter un produit de marques de magasin / distributeur



61%	+3	58%	+5	53%	48%	50%	49%	39%	40%
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De faire vos courses dans un magasin Hard Discount (comme Leader Price, Ed,...)



37%	+6	9%	-3	10%	17%	14%	4%	44%	9%
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Confiance envers les types de commerces

Q10 : Parmi les types de commerces suivants, auquel faites-vous le plus confiance ?

Total Nov.2007 (4344)



	France	UK	USA	AUS	SA	BRA	CHN	RUS
Evolution Oct. 2006	-2	-4						
Evolution Oct. 2006								
Confiance	50%	59%	61%	44%	78%	78%	92%	61%
Evolution	+3	+3						
Confiance	25%	21%	24%	29%	3%	11%	2%	7%
Evolution	=	+1						
Confiance	23%	16%	8%	18%	5%	7%	2%	6%
Evolution	+1	-2						
Confiance	3%	3%	8%	10%	13%	4%	3%	26%

Garant de la traçabilité

Q12 : Qui doit être pour vous le garant de la traçabilité d'un produit ?

Total Nov.2007 (4344)

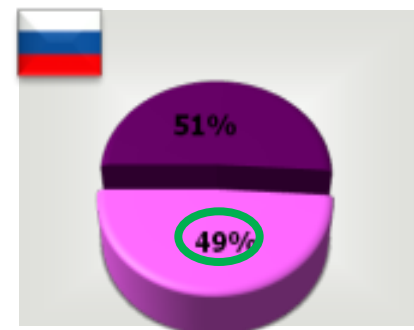
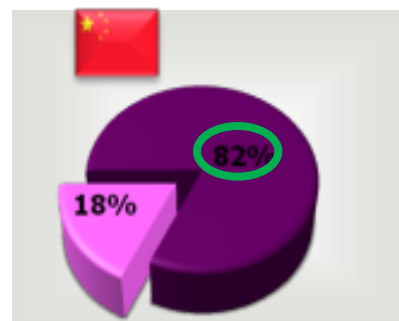
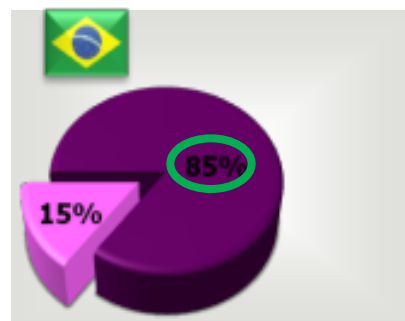
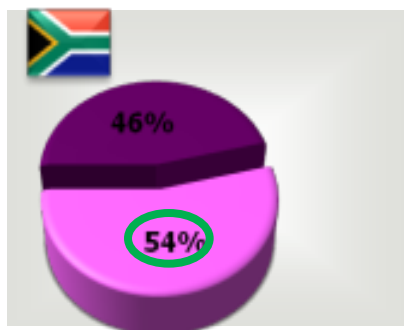
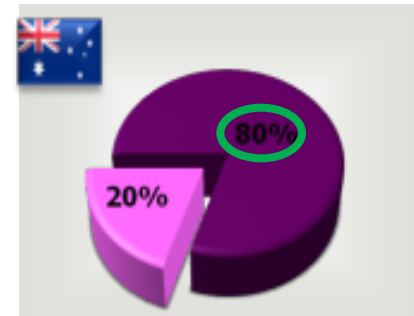
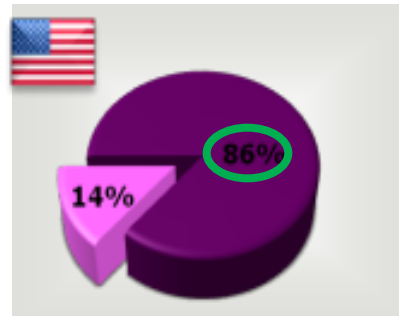
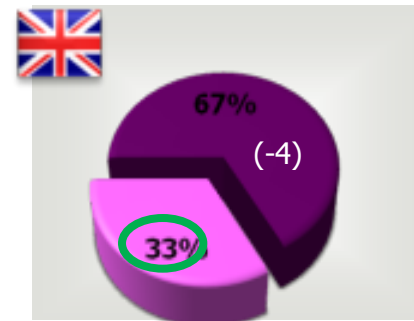
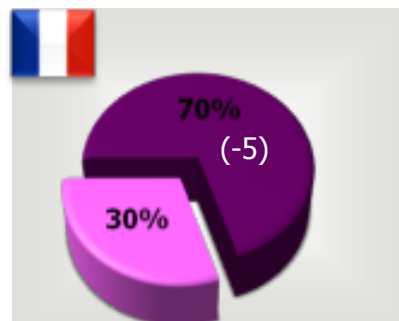
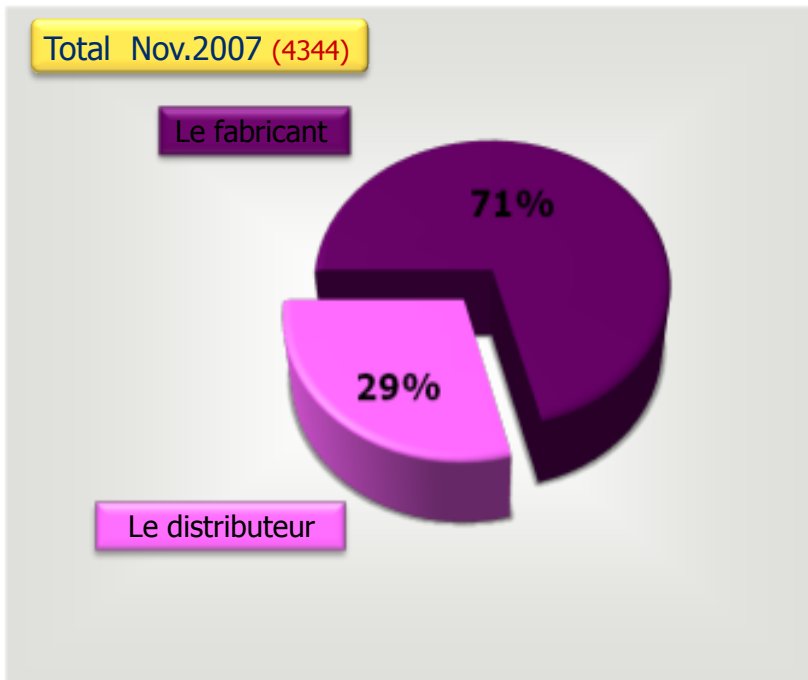


	France	Evolution Oct. 2006	Royaume-Uni	Evolution Oct. 2006	USA	Australie	Afrique du Sud	Brazill	Chine	Russie
Les fabricants	53%	-4	61%	-6	73%	61%	59%	68%	53%	73%
Les pouvoirs publics (règlements ministériels.)	55%	-4	44%	-4	30%	49%	38%	55%	53%	18%
Les associations de consommateurs	40%	-5	29%	-7	21%	31%	35%	22%	42%	47%
La grande distribution	20%	NP	34%	NP	27%	25%	31%	20%	26%	37%
Les scientifiques	14%	-6	7%	-1	7%	9%	17%	5%	4%	8%
Les médias	2%	+1	1%	-1	4%	1%	3%	8%	8%	6%

2 réponses possibles

Responsable en cas de problème

Q24 : En cas de problème avec un produit, qui jugeriez-vous responsable ?



Les garanties de la traçabilité

Q14 : Quel serait selon-vous le meilleur moyen de vous prouver qu'une traçabilité est assurée sur un produit ?

Total Nov.2007 (4344)



	France	UK	USA	Australia	South Africa	Brazil	China	Russia	
Evolution Oct. 2006		Evolution Oct. 2006							
60%	-5	70%	-2	54%	69%	63%	60%	36%	59%
30%	+3	18%	+1	35%	21%	30%	35%	56%	31%
8%	+2	9%	-1	9%	6%	5%	2%	3%	3%
2%	=	3%	+1	2%	4%	2%	3%	5%	7%

5

La RFID : notoriété et applications

- ▶ 19% of people declare they have already heard about RFID. If the awareness of this technology is weaker in France (7%), the UK and Russia (both 5%), Chinese are 73% !! Indeed, Chinese people are much more sensitive to technology in general and this interest is expressed in their purchase behaviors: Chinese pay a lot of attention to the kind of components that are equipping the electrical products they plan to purchase. Furthermore, China represent a gigantic market for RFID as the authorities are developing an identification program based on RFID and applied to commercial trade, to industry and mainly to administrative process (residence cards). According to In-Stats a business consultancy, China will be equipped with more than 2.9 billion of RFID markers before end of 2009 (www.instat.com) !
- ▶ The main application of RFID is the medical application: patients and treatments identification in hospitals (73%) (This concerns mostly French (84%), British and Australians (81%)).
- ▶ The second interest is the assurance of the authenticity of products purchased and to prevent counterfeits with 65% of quotations. This represents the main interest for Russians (91%) and Chinese (71%), countries where counterfeiting is a national issue.
- ▶ The next applications, with a third of quotations, are the security in houses and luggage identification in airports.
- ▶ RFID technologies get great marks about their developments with 64% declaring it is something that presents certain advantages but should be controlled, and 33% saying it is something that presents huge advantages and should be developed. Whereas one out of three overall agrees, Americans are only 28%. On the contrary, countries that are the most exposed to counterfeiting are much more open to RFID development : 67% in South Africa, 65% in Brazil, 63% in Russia and 60% in China.

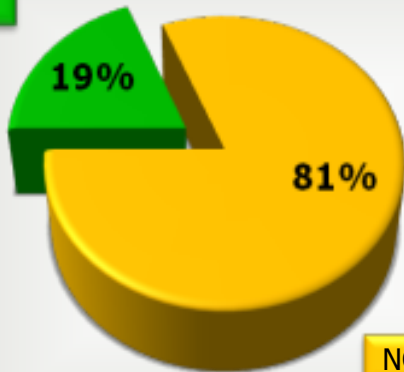
About the perception of RFID implementation in the future, 85% of people believe RFID labelling is likely to develop a lot or moderately (In China where the technology is already established, they are 'only' 79%).

Notoriété de la RFID

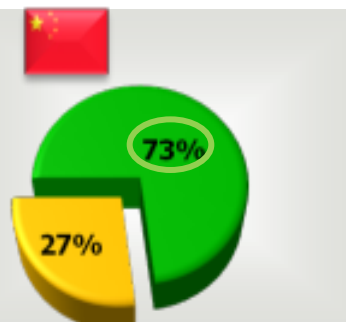
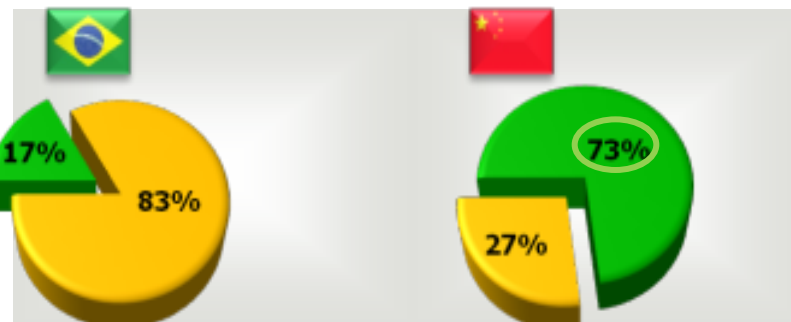
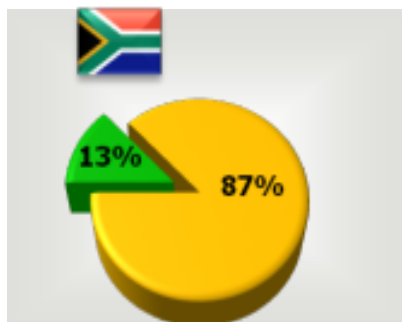
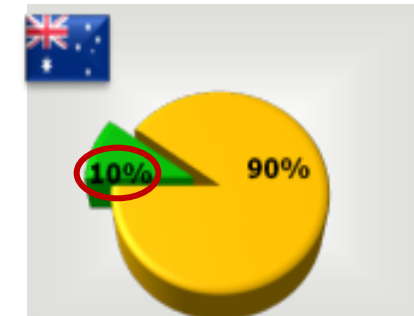
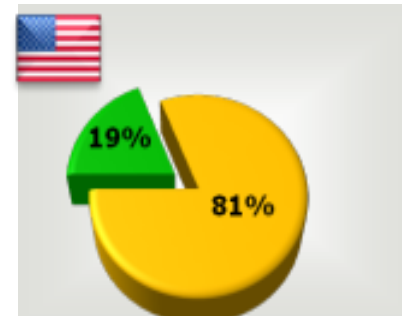
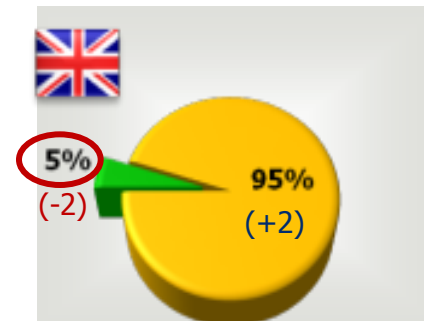
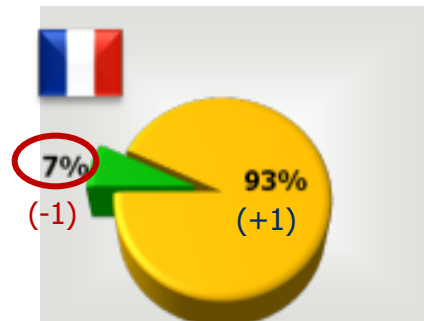
Q19 : Avez-vous déjà entendu parler de la RFID ?

Total Nov.2007 (4344)

OUI



NON



Applications prioritaires de la RFID

Q20 : La RFID est une technologie qui permet de suivre un produit depuis sa fabrication jusqu'à son achat, grâce à une puce insérée dans l'emballage du produit. La technologie RFID est déjà présente dans notre vie quotidienne, à travers des utilisations existantes ou à venir.

Parmi celles-ci, quelles sont celles que vous jugez les plus importantes ?

Total Nov.2007 (4344)

Les étiquettes RFID permettent dans les hôpitaux, d'assurer que les médicaments et/ou soins soient donnés aux patients sans erreur de posologie ni confusion de patient

72%

Les étiquettes RFID permettent de s'assurer de l'authenticité des produits achetés, évitent les « imitations »

65%

La technique RFID permet une sécurisation des entrées à la maison, à l'usine au bureau.

34%

Les étiquettes RFID permettent une identification et localisation rapide des bagages dans le transport aérien.

33%

Les étiquettes RFID permettent l'identification des animaux domestiques.

25%

Les étiquettes RFID permettent d'avoir des tickets intelligents de transport ou d'entrée dans des événements culturels ou sportifs

19%

La technique RFID permet le péage rapide sur autoroute

13%









La technique RFID permet la mise en route et/ou l'ouverture facile de sa voiture.

12%

Applications prioritaires de la RFID

Q20 : La RFID est une technologie qui permet de suivre un produit depuis sa fabrication jusqu'à son achat, grâce à une puce insérée dans l'emballage du produit. La technologie RFID est déjà présente dans notre vie quotidienne, à travers des utilisations existantes ou à venir.

Parmi celles-ci, quelles sont celles que vous jugez les plus importantes ?

	Total (4344)	 Evolution Oct. 2006	 Evolution Oct. 2006						
Dans les hôpitaux, d'assurer que les médicaments soient donnés sans erreur, ni confusion	72%	84% -3	81% +2	70%	81%	62%	76%	61%	63%
S'assurer de l'authenticité des produits achetés	65%	65% +3	60% +11	46%	55%	59%	74%	71%	91%
Une sécurisation des entrées	34%	18% -9	45% +4	40%	36%	45%	27%	35%	26%
Identification et localisation rapide des bagages	33%	28% -12	28% -11	24%	31%	41%	40%	45%	25%
Identification des animaux domestiques	25%	39% +6	31% +4	38%	35%	22%	15%	9%	16%
Avoir des tickets de transport ou d'entrée intelligents	19%	9% =	16% +1	11%	16%	17%	19%	30%	32%
Péage rapide sur autoroute	13%	14% =	5% -4	15%	12%	16%	12%	21%	6%
La mise en route et/ou l'ouverture facile de sa voiture.	12%	8% +2	12% -3	16%	14%	24%	5%	12%	3%

Q21 : Pour vous, quel sont les principaux atouts de la technologie RFID ?

Total Nov.2007 (4344)



	France	Evolution Oct. 2006	UK	Evolution Oct. 2006	USA	Australia	South Africa	Brazil	China	Poland
L'authentification des produits (pour lutter contre la contrefaçon)	60%	+18	58%	+15	52%	55%	44%	69%	73%	83%
La certitude de qualité et de fraîcheur	63%	-11	50%	+2	43%	57%	42%	43%	48%	66%
L'obtention du certificat de garantie, permettant meilleur SAV à la clientèle	29%	+2	32%	+3	29%	39%	34%	62%	42%	13%
La rapidité et facilité lors du passage en caisse	27%	+5	25%	+6	35%	30%	41%	24%	33%	33%
La réduction des pertes et des vols de produits	19%	-4	38%	-5	40%	34%	24%	38%	13%	25%
La sécurité en magasin	15%	-8	22%	-7	25%	26%	33%	13%	25%	25%
La facilité d'identification pour le recyclage	24%	+5	17%	-2	9%	13%	25%	15%	26%	7%
La diminution des litiges	15%	-5	13%	+3	14%	10%	29%	11%	18%	14%
La baisse des ruptures de produits en magasin	10%	+1	12%	+2	15%	9%	19%	5%	6%	9%
Autre	2%	+1	3%	+3	3%	1%	1%	1%	0%	-

6

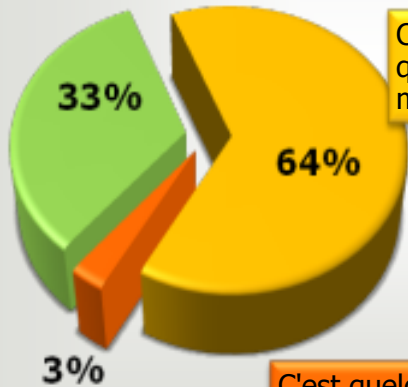
La RFID : risques et perceptions

Perception de la RFID

Q21bis : Qu'est-ce que la RFID évoque pour vous ?

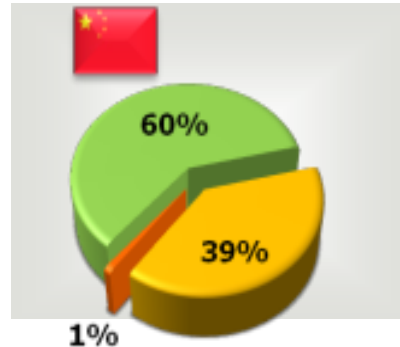
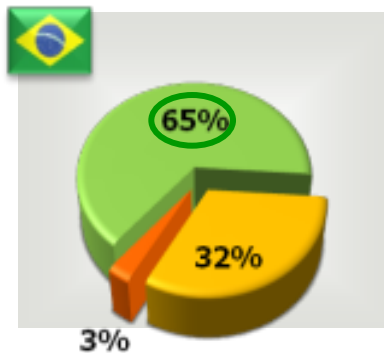
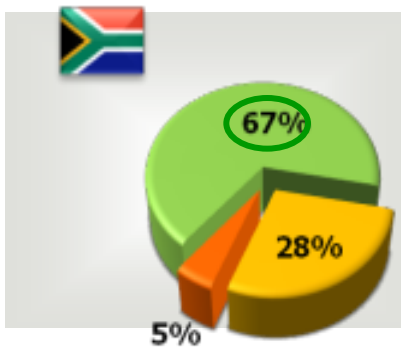
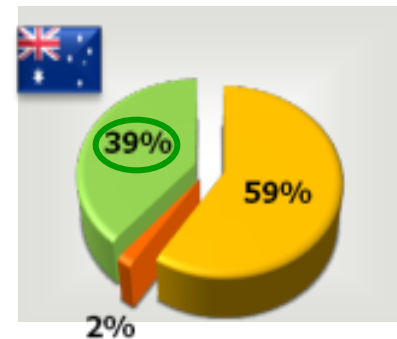
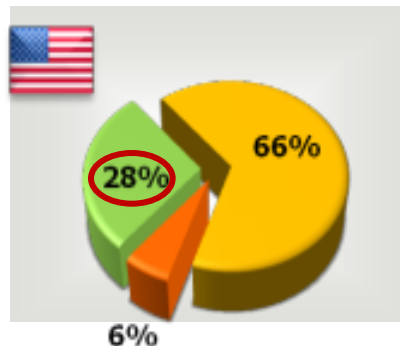
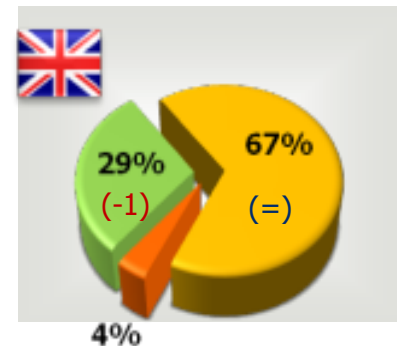
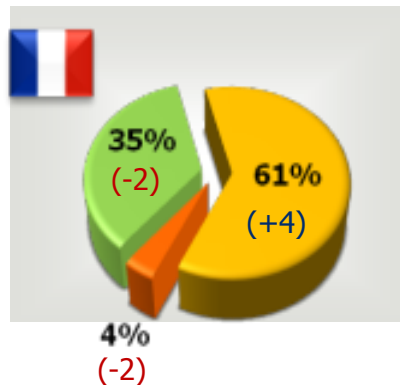
Total Nov.2007 (4344)

C'est quelque chose qui représente énormément d'avantages et devrait être développé



C'est quelque chose qui représente certains avantages mais devrait être contrôlé

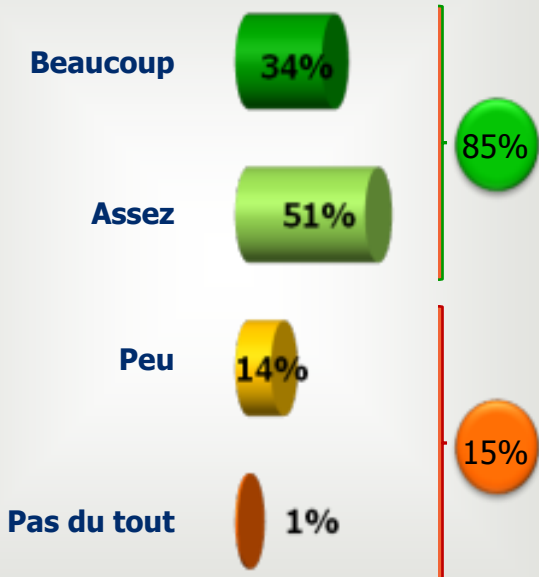
C'est quelque chose qui m'effraie











Perception du développement des étiquettes RFID

Q22 : Et diriez-vous que la mise en place des étiquettes RFID est appelée à se développer beaucoup, assez, peu ou pas du tout ?

Total Nov.2007 (4344)



							
87% (-4)	87% (-1)	88%	91%	89%	92%	79%	67%
13%	13%	12%	9%	11%	8%	21%	33%

7

Information sur les
produits: satisfaction,
intérêts & attentes

Synthesis / Information on products: satisfaction, interests & expectations (1/2)

- ▶ Overall people are not so satisfied about the information displayed on product labels (54% of satisfaction, with only 4% very satisfied). This shows more a lack of interest (9 persons out of 10 positioned themselves in the middle items) than a real dissatisfaction. The most skeptical are Russians with only 19% satisfied. In Brazil they are only 25%.
- ▶ Reasons of being unsatisfied are mostly connected with the ingredients and components : 28% of respondents spontaneously complain about the lack of information regarding the origin of ingredients and 22% talk about the lack of having an exhaustive list of all ingredients (this represents the main reason for Russians with 29% of quotations)
- ▶ Chinese, Brazilians and Russians are over represented amongst respondents that ask for getting more information about products from their own country (85% on average and more than 95% in those countries).
- ▶ French people are the one who expect the most about getting more info : 93% of French are expecting more information about products from Asia (Chinese are 92% vs. 84% overall), 92% about products from the USA (vs. 80% overall), 89% from European countries (vs. 83% overall).

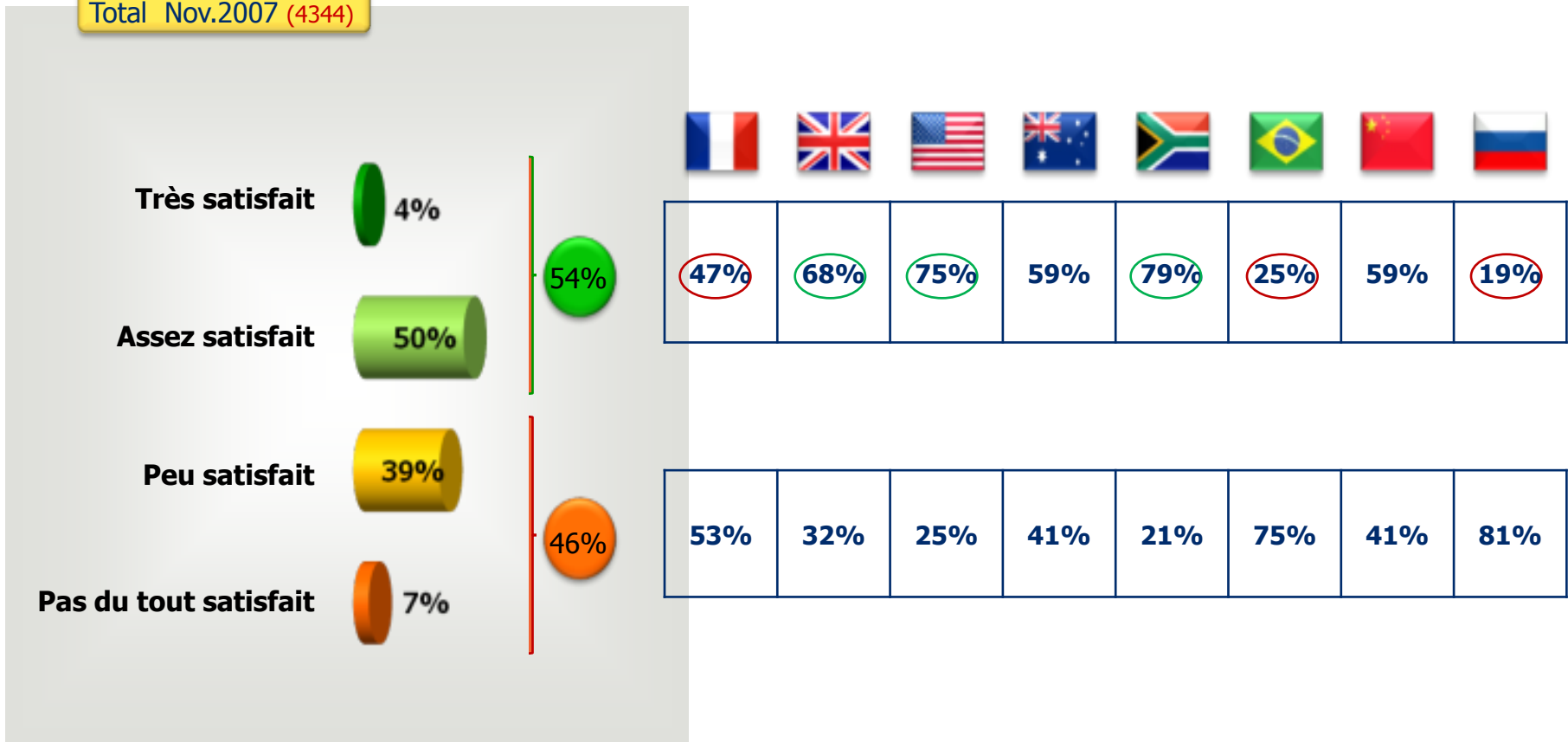
Synthesis / Information on products: satisfaction, interests & expectations (2/2)

- ▶ Product packaging is the most favourite medium to be informed about products whatever the country (especially in Russia and France). In the USA, 35% of the respondents would like to get information on the Internet (vs. 17% on average). In between, 22% overall would prefer the point of sale (interactive in-store terminals in stores, etc.).
- ▶ Overall people are quite inclined to pay 2 Euro cents more to enhance the traceability of a product (65%).
- ▶ In France, only 60% of respondents share this opinion (9 points less than last year / this decrease might be explained with the purchase power issue at the moment). On the contrary, British are 5 points higher than last year to be open (62%). The lowest agreement comes from Australia (49%) and the USA (51%), while 85% of Russians and 79% of Brazilians are in favor of it.
- ▶ If people are open to pay more, they are also ready to consult information via their mobile phone or via the Internet : 40% on a regular basis and 54% occasionally. As with the extra cost, Anglo Saxon countries show a lower interest.
Brazilians are the most interested with 75% of them declaring they would consult on a regular basis. Russians are 62% and Chinese 53%.

Satisfaction envers l'information disponible sur les étiquettes des produits

Q17 : Diriez-vous que vous êtes très, assez, peu ou pas du tout satisfait de l'information disponible actuellement sur les étiquettes des produits ?

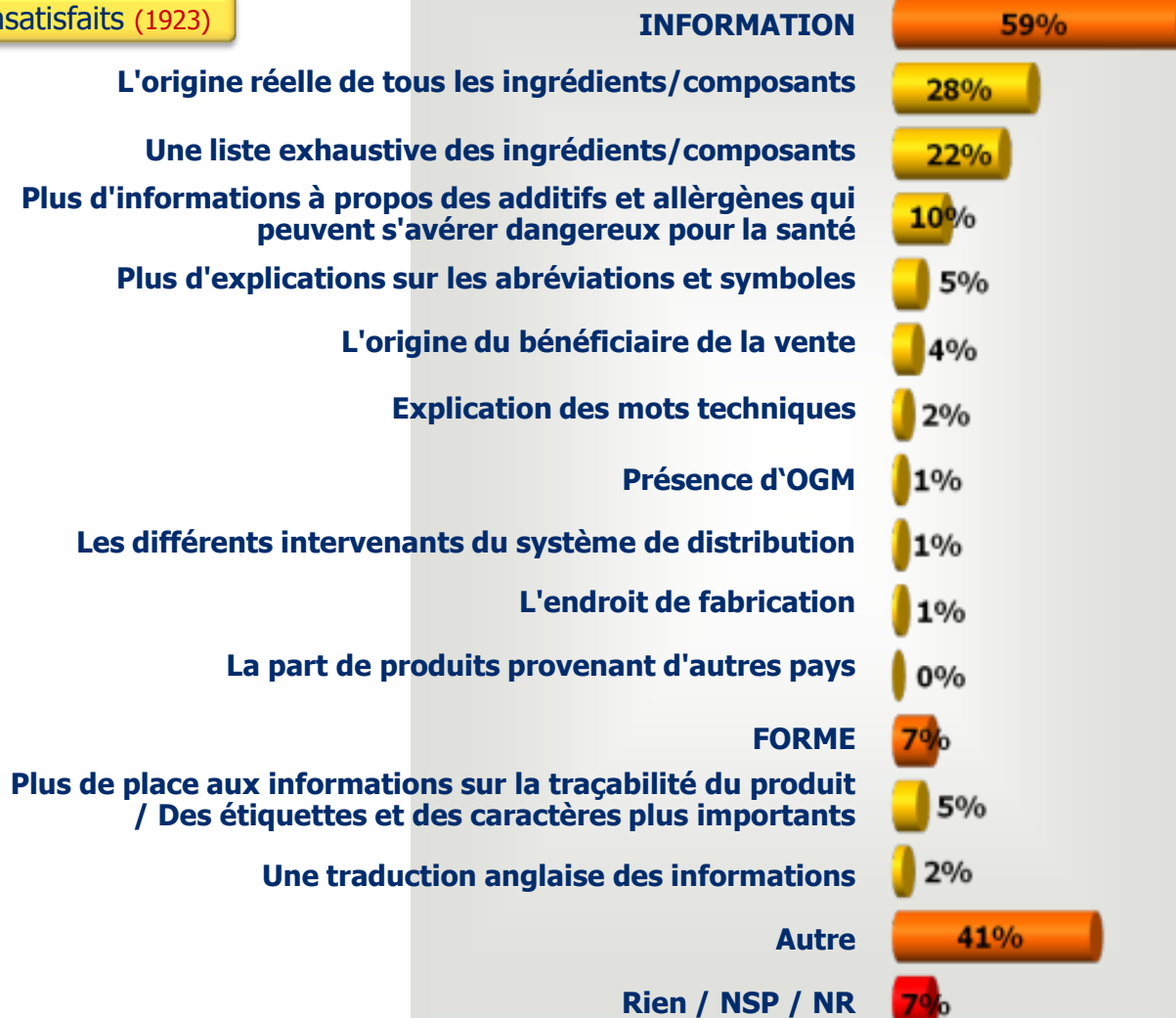
Total Nov.2007 (4344)



Satisfaction envers l'information disponible sur les étiquettes des produits

Q17Bis : Quelles sont les informations manquantes selon vous ?

Total Insatisfaits (1923)



Satisfaction envers l'information disponible sur les étiquettes des produits

Q17Bis : Quelles sont les informations manquantes selon vous ?

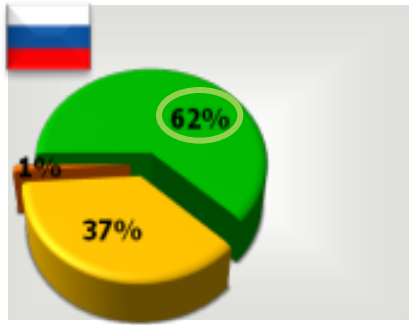
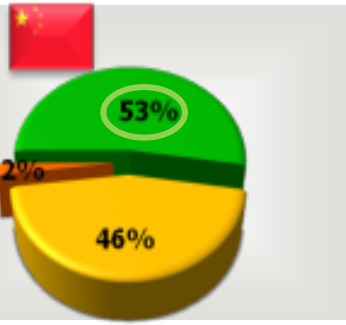
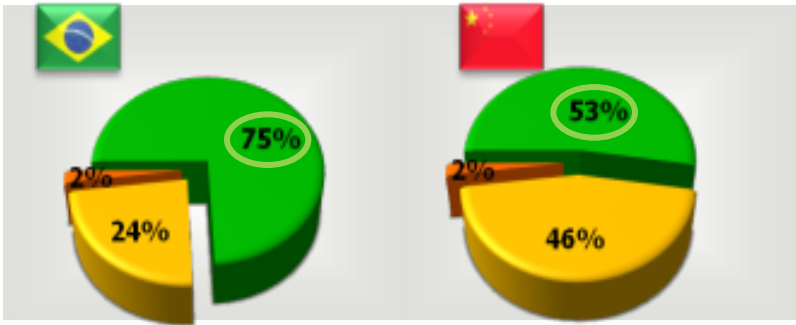
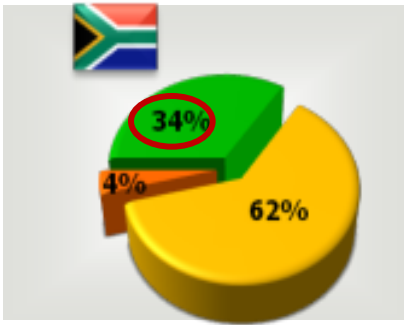
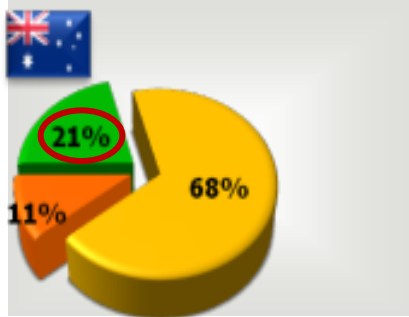
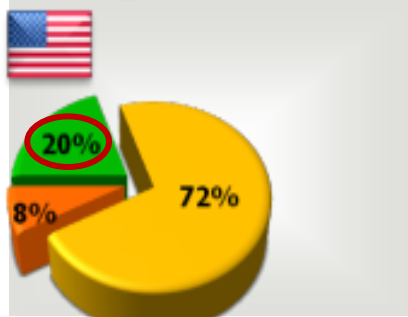
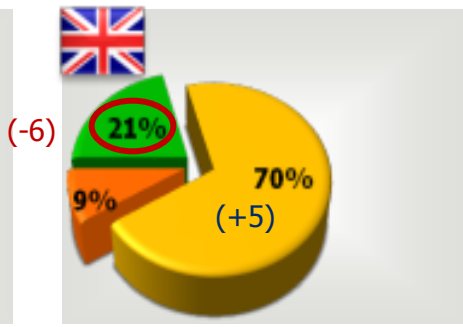
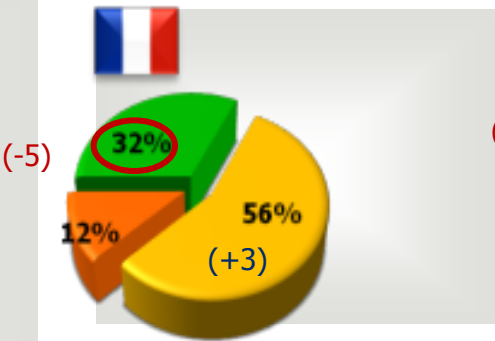
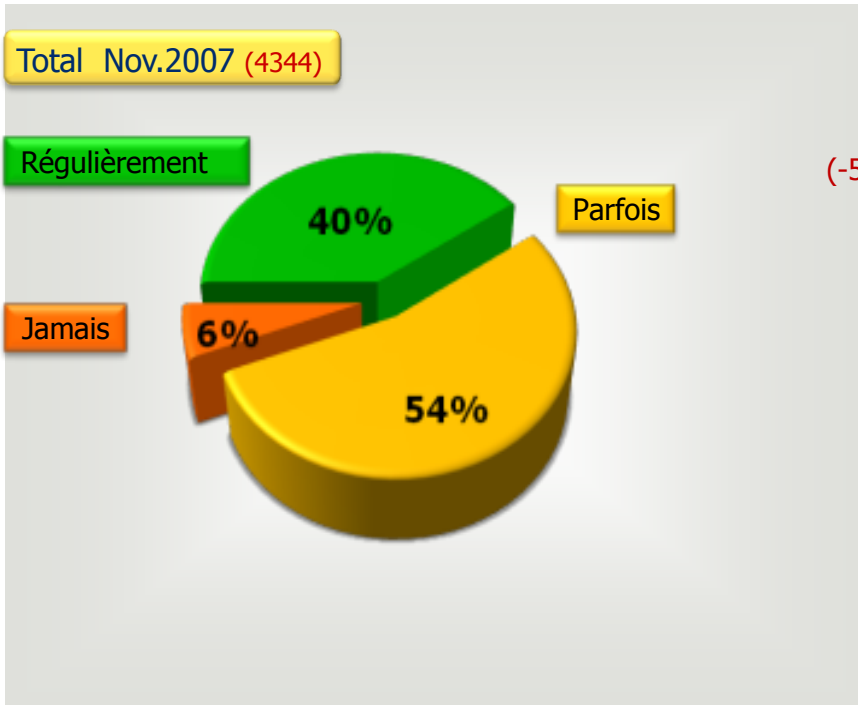
Total Insatisfaits (1923)



INFORMATION	59%	60%	59%	74%	67%	53%	59%	48%	61%
L'origine réelle de tous les ingrédients	28%	31%	48%	53%	42%	21%	33%	9%	18%
Une liste exhaustive des ingrédients	22%	15%	11%	12%	9%	13%	26%	34%	29%
Plus d'informations à propos des additifs et allergènes dangereux pour la santé	10%	6%	10%	13%	12%	13%	11%	6%	12%
Plus d'explications sur les abréviations et symboles	5%	3%	3%	4%	15%	0%	2%	1%	9%
L'origine du bénéficiaire de la vente	4%	0%	0%	6%	9%	-	0%	-	11%
Explication des mots techniques	2%	3%	1%	2%	1%	7%	3%	4%	0%
La part de produits provenant d'autres pays	0%	0%	-	-	1%	-	0%	-	1%
FORME	7%	6%	9%	-	10%	6%	14%	6%	1%
Plus de place aux informations sur la traçabilité du produit / Des étiquettes et des caractères plus importants	5%	6%	8%	-	8%	-	10%	6%	1%
Une traduction anglaise des informations	2%	-	1%	-	3%	6%	6%	-	-
Autre	41%	8%	33%	22%	25%	37%	58%	45%	59%
Rien / NSP / NR	7%	27%	1%	4%	2%	6%	1%	2%	4%

Intérêt envers l'information liées aux produits

Q23 : Si vous disposiez par téléphone, ou Internet d'informations liées aux produits que vous achetez, iriez vous les consulter ?

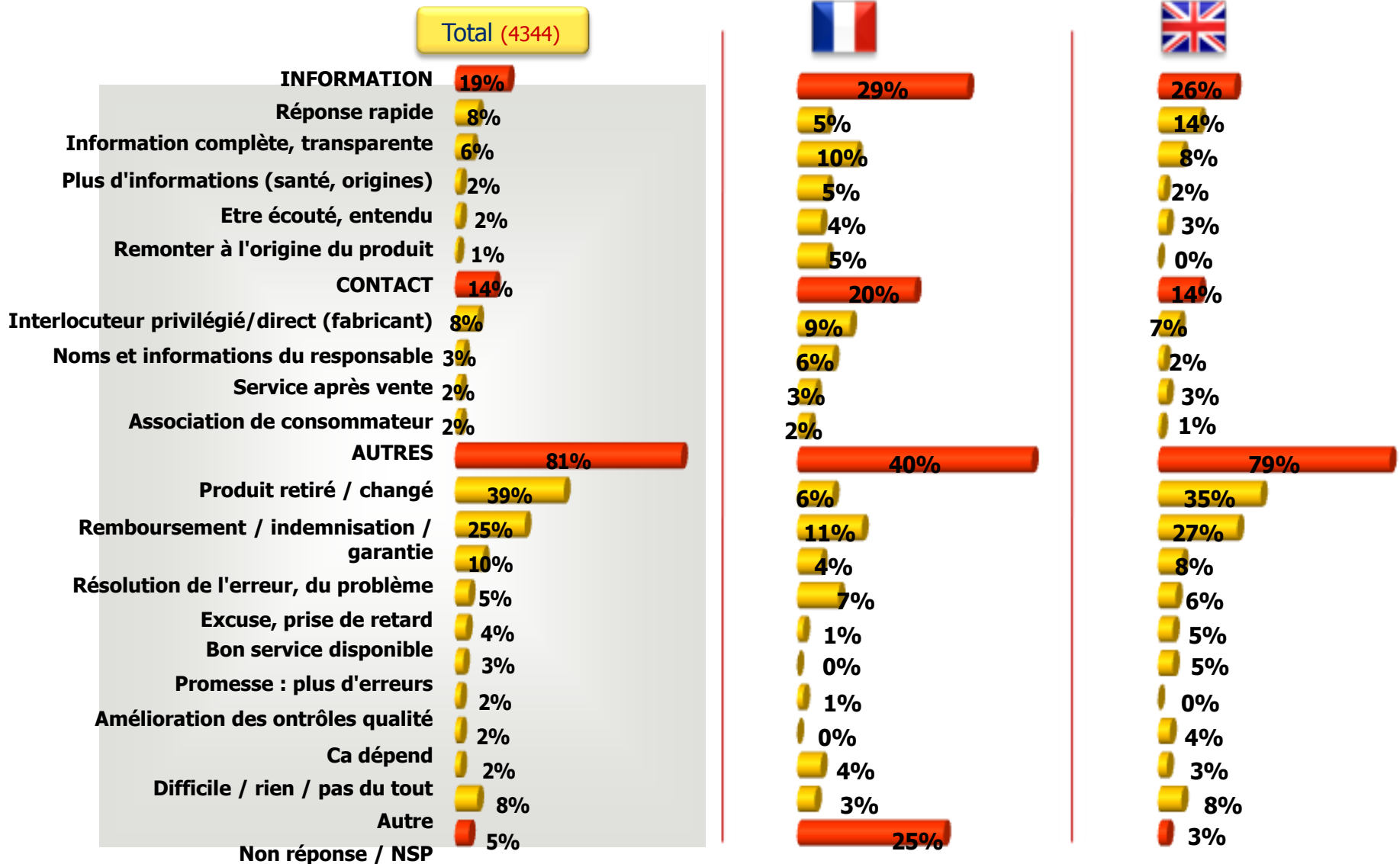


8

Expectations in case
of a problem with a
product

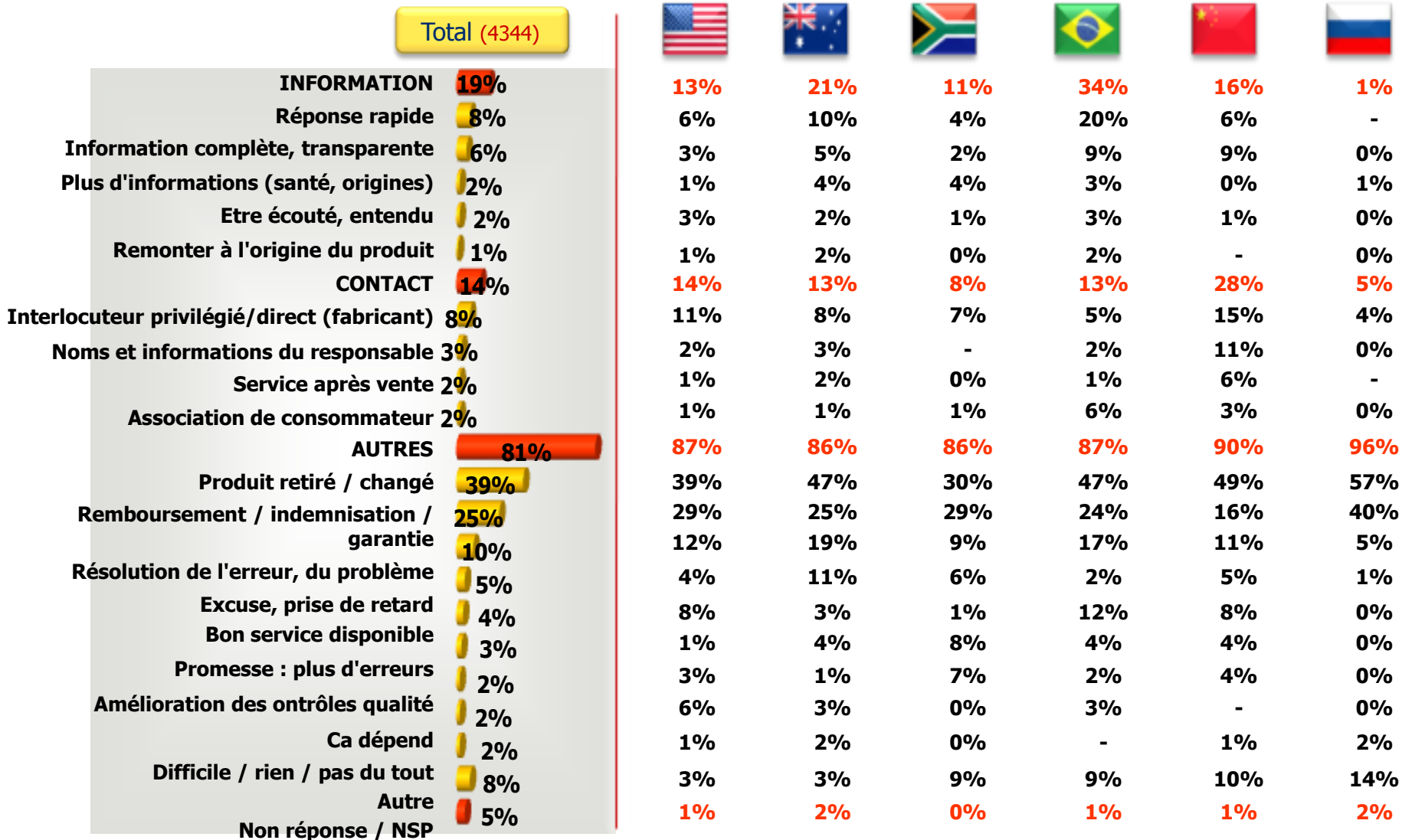
Attentes en cas de problème

Q25: En cas de problème avec un produit, qu'est ce qui vous rassurerait ?



Attentes en cas de problème

Q25: En cas de problème avec un produit, qu'est ce qui vous rassurerait ?





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