

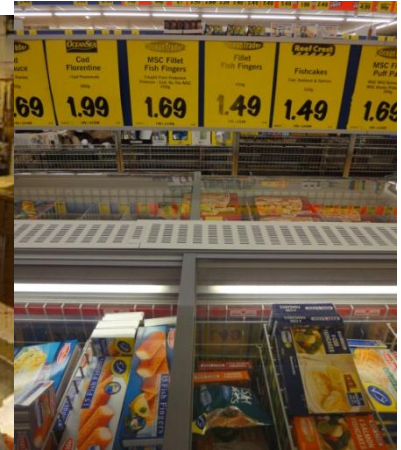
Consumer perceptions and attitudes about sustainability in UK and France

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Consumer perceptions and attitudes about sustainability

(Rapport 46/2011, Pirjo Honkanen)



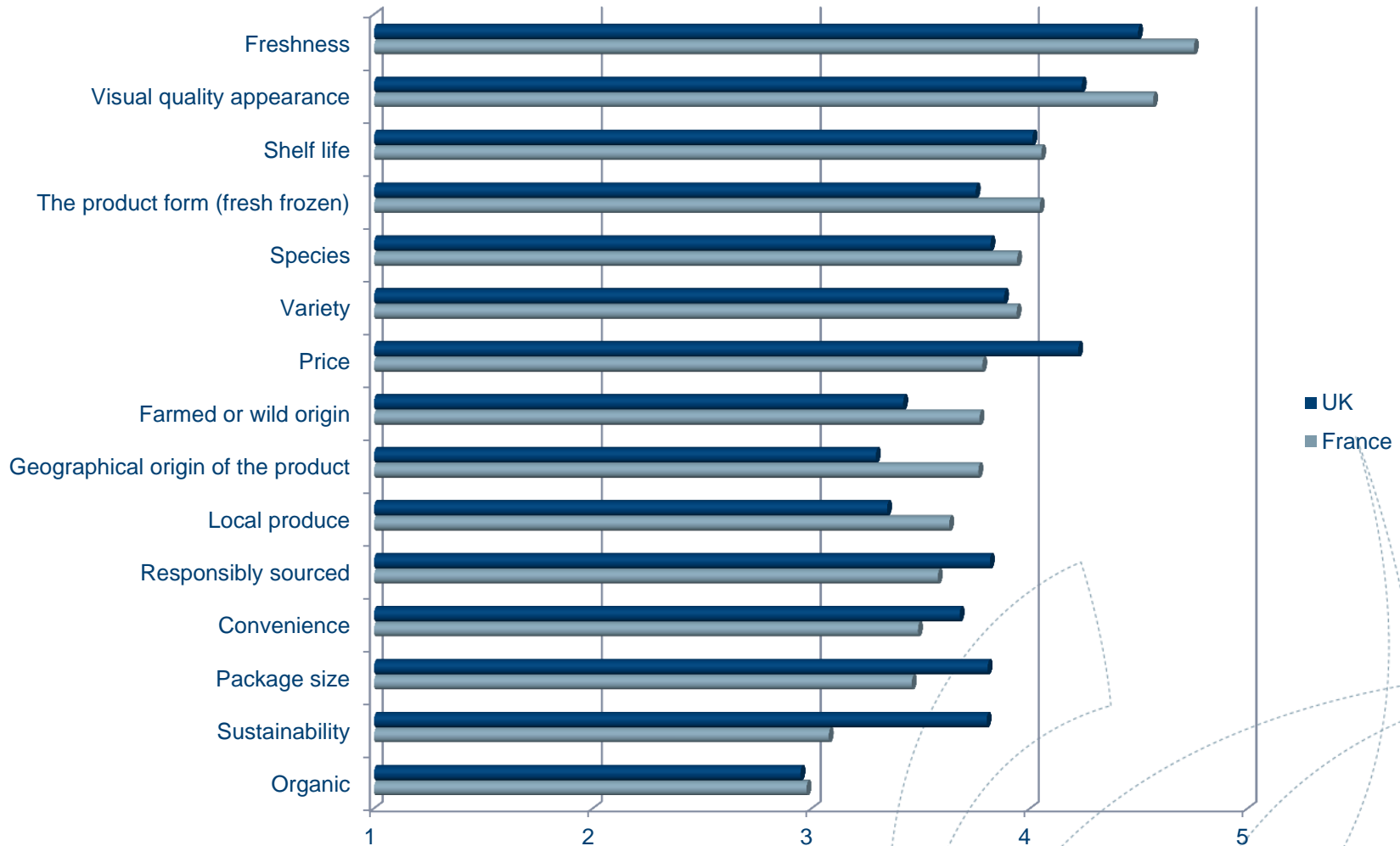
Aim:

- ✓ Insight into consumers perceptions and knowledge about sustainability and different eco label schemes
 - ✓ What does sustainability means to consumers
 - ✓ Do they manage to distinguish between different kinds labels, their content
 - ✓ Does it affect their buying behaviour
 - ✓ How important is sustainability for the consumers' behaviour in comparison to other buying criteria (sensory qualities, price, origin etc.)

Methods:

- ✓ Consumer studies in UK and France
- ✓ Focus group meetings (4 in each country)
- ✓ Survey (ca. 1000 respondents per country)

Sustainability is not an important buying criteria



Most consumers do not look for sustainability logos

Thinking of the last ten times that you purchased seafood, how often do you recall it being labeled sustainable?

	UK (%)	France (%)
Never	35	8
Seldom (1-3)	26	13
Sometimes (4-6)	17	9
Often (7-9)	6	3
Always	16	3
Don't know		64



Recognition of the MSC logo in UK and France



What do you associate with MSC label

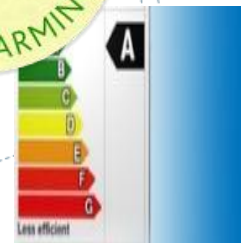


	UK N=1001)	France (N=1035)
Have not seen	70	82
Have seen	30	18

	Uk	France
Don't know	22	47
Environment	30	20
Organic	4	7
Health	7	45
Quality	20	15
British/French origin	8	3
Sustainability	53	33
Local product	6	6
Fairness	16	8
Climate	4	1
Animal welfare	25	6



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UK

To what degree do you have confidence in the following organisations/labels?

	No trust	Neither agree or disagree	Trust	Do not know the organisation
Friend of the Sea	3 %	28 %	37 %	32 %
Marine Conservation Society	2 %	24 %	48 %	26 %
Icelandic Responsible Fisheries	5 %	26 %	37 %	33 %
Marine Stewardship Council	3 %	26 %	47 %	24 %
Freedom Food	4 %	23 %	57 %	17 %
WWF	5 %	23 %	67 %	6 %
Greenpeace	12 %	29 %	54 %	5 %



France

To what degree do you have confidence in the following organisations/labels?

France	No trust	Neither agree or disagree	Trust	Do not know the organisation
AOC (french origin)	6 %	11 %	80 %	3 %
MSC	7 %	30 %	38 %	26 %
Label Rouge (quality)	9 %	14 %	75 %	4 %
WWF	7 %	21 %	67 %	6 %
AB (ecologic)	13 %	29 %	56 %	3 %
Greenpeace	17 %	36 %	45 %	3 %

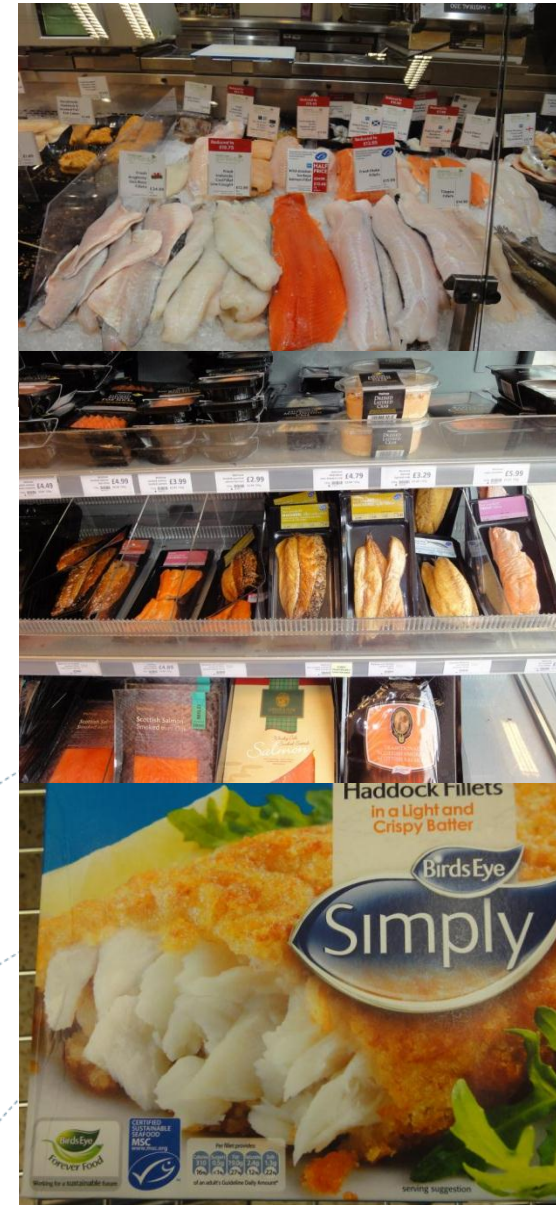


Knowledge and trust do not automatically translate into buying

To what extent do you use these labels when buying seafood?

UK	Never %	Sometimes %	Always %
Producer brand	30 %	60 %	12 %
Supermarket brand	30 %	60 %	10 %
Line caught	50 %	40 %	9 %
MSC	57 %	35 %	8 %
Friend of the sea	64 %	30 %	5 %
Icelandic responsible fisheries	65 %	30 %	5 %

France	Never %	Sometimes %	Always %
AOC (french origin)	20 %	55 %	25 %
Label Rouge (quality)	25 %	50 %	20 %
Producer brand	15 %	65 %	20 %
Supermarket brand	20 %	60 %	20 %
AB (ecological)	40 %	50 %	13 %
MSC	70 %	30 %	4 %



Preliminary results

- ✓ Consumers concern for the environment is related to other issues than fisheries
 - ✓ Sustainability in fisheries is not consumer driven
 - ✓ The consumers trust / want the supermarkets to do the job for them
 - ✓ too much information out there
 - ✓ too many labels
 - ✓ know too little themselves
- = how to inform the consumers?

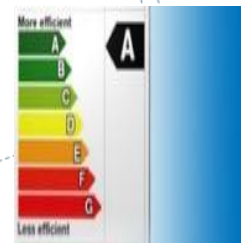


- ✓ Consumers will continue to buy non-certified Norwegian and Icelandic fish if available
 - ✓ The survey showed high confidence in Icelandic and Norwegian fisheries management
- ✓ Consumers are not loyal to one sustainability logo/certifier
 - ✓ 10% MSC loyal, 60% don't care, 30% potential users – who are they?
- ✓ Are consumers willing to pay more for certified fish?





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