

Country of Origin Labelling

Omnibus Research Report July 2007

Background and Methodology

An EU Review of food labelling legislation is currently underway. The Food Standards Agency commissioned research to investigate consumer views of the importance of country of origin labelling, why it may be considered important, on what food products it would most likely be used and finally what information consumers would want included in country of origin labelling. Findings will inform policy development in the course of the Review.

Questions were placed on the all adults' UK-wide omnibus survey run by RSGB Omnibus, the final questionnaire can be found in Appendix 1. The Omnibus interviews were conducted face-to-face utilising multimedia CAPI (Computer Assisted Personal Interviewing). A representative sample (in terms of gender, age, and working status) of 1720 adults aged 16+ in the UK, who had joint or sole responsibility for household shopping, were interviewed between the 20th and 24th June 2007. The data was weighted at the analysis stage to ensure that the final sample was demographically representative. Appendix 2 has the full sample profile (unweighted), including demographic and regional breakdowns.

The social grade definitions referred to throughout this report are based on the Chief Income Earner in the household of the respondent. Brief explanations of the social grade definitions are shown in the table below:

Social Grade	Definition
A	Higher managerial, administrative or professional
B	Intermediate managerial, administrative or professional
C1	Supervisory or clerical, and junior managerial, administrative or professional
C2	Skilled manual workers
D	Semi and unskilled workers
E	State pensioners or widows (no other earner), casual or low grade workers

The map shown below illustrates the nine government regions across England that are referred to in this report. Respondents from Scotland, Wales and Northern Ireland were also included in this research.



Key findings

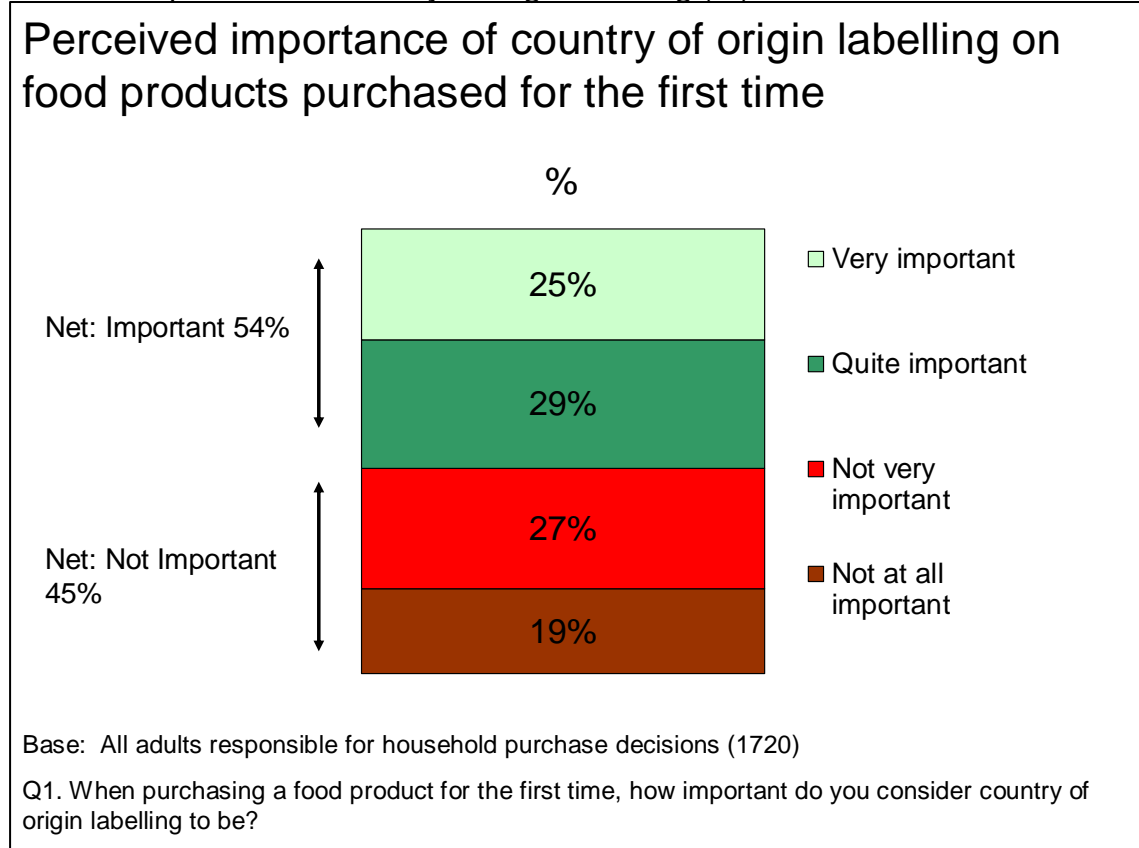
- Country of origin labelling was important to just over half (54%) of respondents interviewed in this survey, with 25% rating it as very important and only one in five (19%) rating it as not at all important.
- The most common reasons given by respondents for the importance of country of origin labelling were a general interest/desire to know (37%) and to support food from a specific area (32%).
- Fresh meat and fruit and vegetables were the food products that country of origin labelling was most likely to be used on (49% and 48% of respondents selected these products respectively). Meat products (36%), fish and shellfish (29%) and cheese (25%) were also important categories to have country of origin labelling for respondents in this survey.
- The majority response for what information should be included on country of origin labelling was that it should show all countries in the chain of production (47%), with a further 28% stating that it should indicate where the raw ingredient in the product comes from. Only 7% felt that it should show only where the final processing took place.

Main findings

1. Importance of country of origin labelling

Respondents were first advised that country of origin labelling is currently required by law on certain products; they were then asked how important they personally felt country of origin labelling to be on food products that they purchase for the first time. Chart 1 below illustrates the findings from this question.

Chart 1: Importance of country of origin labelling (%)



Just over half of respondents (54%) rated country of origin labelling to be important to them when purchasing food products for the first time, with 25% rating it as very important. 27% of respondents rated country of origin labelling to be not very important and 19% thought it to be not at all important.

There was some variation in response to this question by age, with respondents in the higher age groups more likely to rate country of origin labelling as being important than those in the lower age groups. Table 1 overleaf demonstrates this.

Table 1: Importance of country of origin labelling by age group (%)

	All shoppers	16-25	26-35	36-45	46-55	56-65	66+
<i>Base size</i>	1720	156	250	291	237	290	496
Very important	25	12	19	22	25	29	33
Quite important	29	22	30	31	29	32	26
Not very important	27	34	34	26	27	18	25
Not at all important	19	31	17	20	17	20	14
Don't know	1	1	-	-	2	-	2

Highlighted figures are significantly higher than at least one other sub-group

There were some differences in response to this question by social economic group, with those from the higher social grades more likely to rate country of origin labelling as important (quite/very) than those from the lower social grades.

Table 2: Importance of country of origin labelling by social grade (%)

	All shoppers	AB	C1	C2	DE
<i>Base size</i>	1720	305	450	328	637
Net: Important	54	63	55	51	49
Net: Not important	45	36	44	48	50
Don't know	1	1	1	1	1

Highlighted figures are significantly higher than at least one other sub-group

The results also showed that respondents without children in the household were more likely to rate country of origin labelling as important than those with children in the household (57% and 48% respectively), this may be related to differences between the age groups as highlighted above.

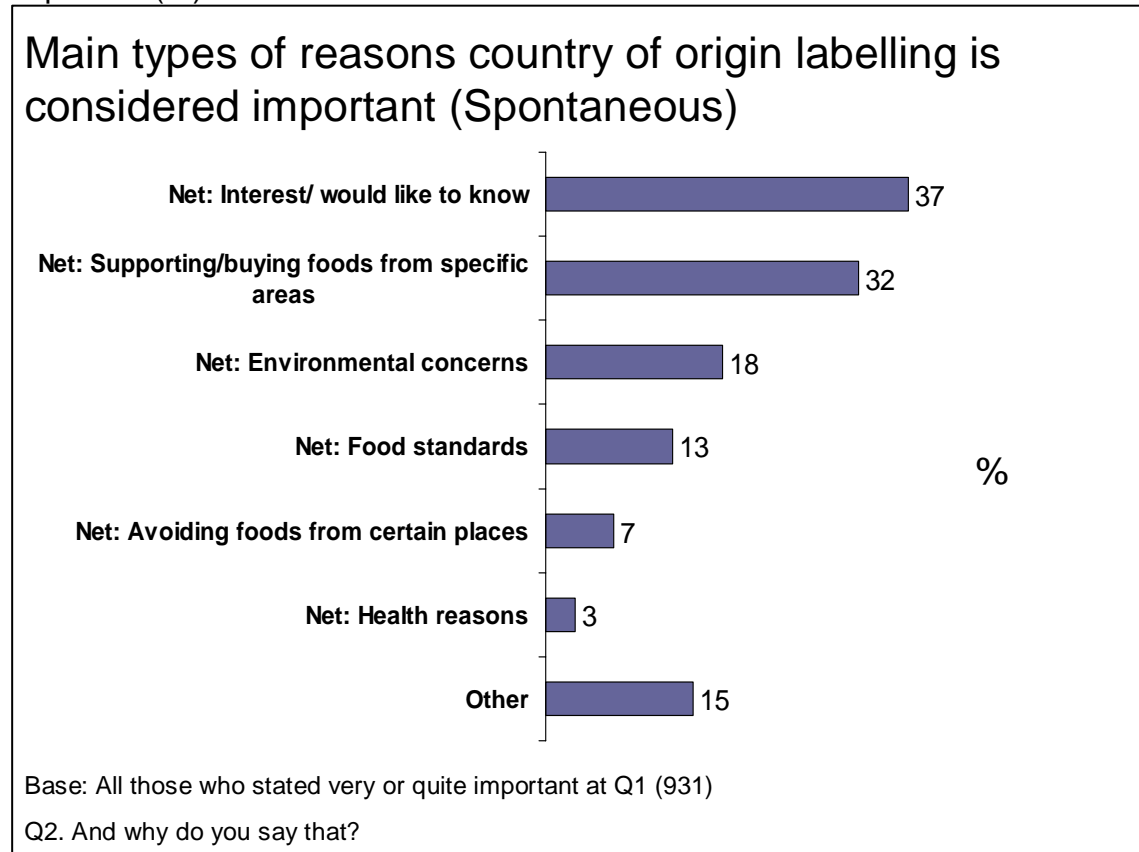
There were also some differences by region, with those in the South East, South West and in Northern Ireland the most likely to rate country of origin labelling as important. (See Table 3 in Appendix 3)

It is interesting to note the importance of country of origin labelling in relation to other pieces of information. The Agency's Consumer Attitudes Survey 2006 asked consumers what information they looked for on labels on products that they purchase for the first time. 8% of respondents stated that they looked for country of origin labelling. Other pieces of information were more top of mind, for example the amount of fat (49%), salt (40%) and sugar (29%).

2. Reasons why country of origin labelling is important

Those consumers who rated country of origin labelling to be quite or very important were asked why they felt it to be important. Chart 2 below shows a summary of the main reasons given.

Chart 2: Summary of main reasons country of origin labelling is considered important (%)



Over a third (37%) of those who felt country of origin labelling important mentioned general interest or a simple desire to know where food has come from as a reason for this. A slightly lower proportion (32%) mentioned supporting foods from specific areas. 18% mentioned environmental or ethical concerns and 13% gave food standards/quality as a reason.

There was some variation in the reasons given across the demographic groups. Women were more likely than men to mention supporting food from specific areas (37% in comparison to 26% of men) and environmental reasons (21% in comparison to 15% of men), whereas men were more likely to mention food standards/quality reasons (18% in comparison to 13% of women).

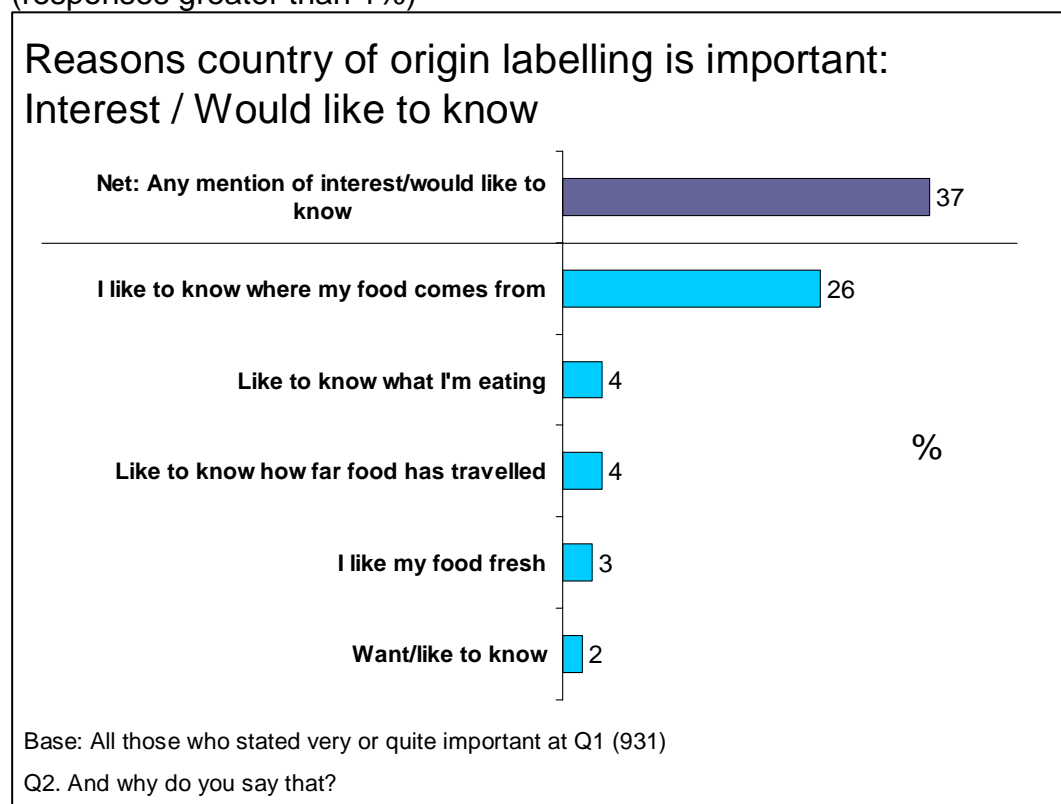
Respondents in the highest age group (66+) were the most likely to mention supporting foods from specific areas (40% in comparison to a maximum of 31% amongst other age groups) but the least likely to mention environmental issues (9% in comparison to a maximum of 25% amongst other age groups). Those in the middle age groups (46-65) were the most likely to mention food

standards/quality reasons (46-55, 16%, 56-65 19% in comparison to maximum of 11% amongst other age groups).

Respondents from the higher social grades were the more likely to mention environmental concerns than those in the lower groups (AB 28%, C1 25%, C2 11% and DE 8%).

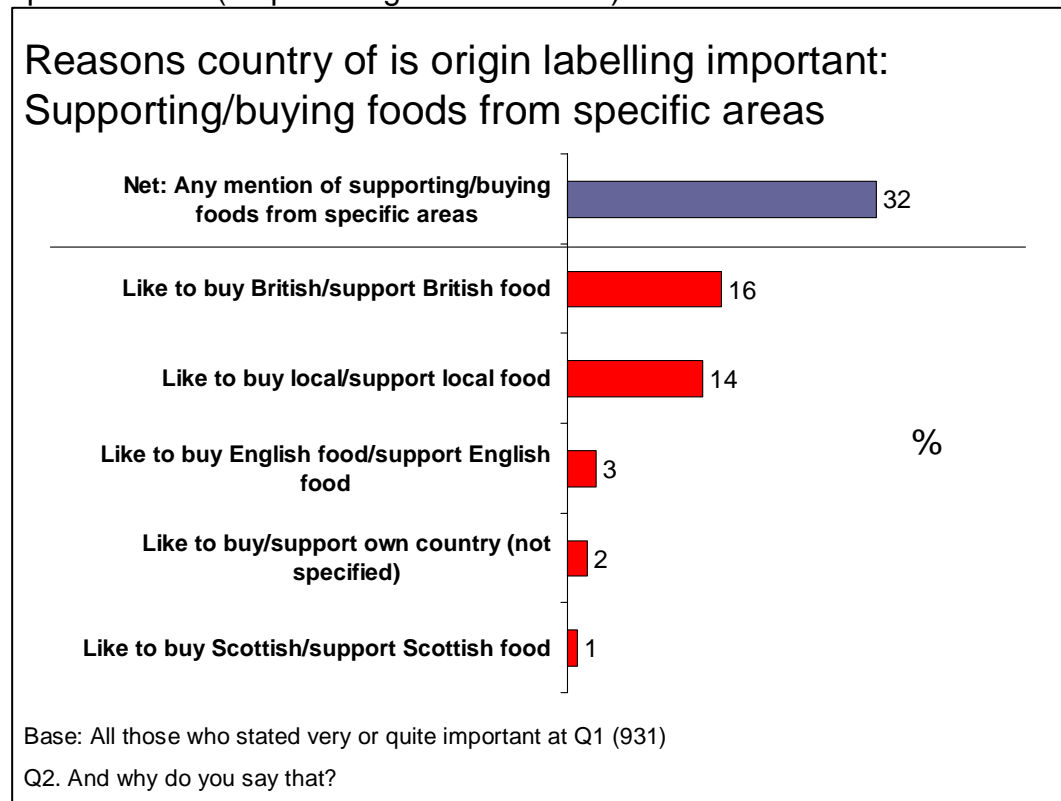
Chart 2 above showed a summary of the main types of reasons consumers felt country of origin labelling to be important. Charts 3, 4 and 5 below show the responses which have been summarised into the top three themes of interest/would like to know, supporting foods from local areas and environmental/ethical concerns.

Chart 3: Individual responses summarised as interest/would like to know (responses greater than 1%)



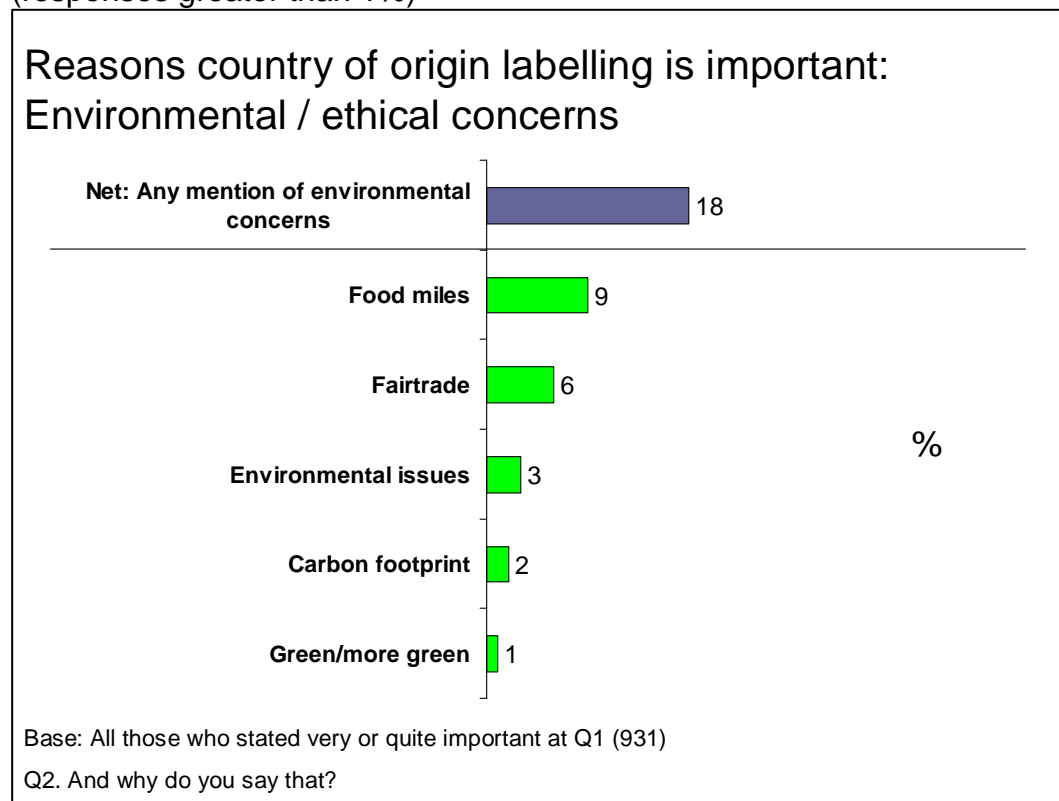
Approximately a quarter (26%) of those who rated country of origin labelling to be important said that they “like to know where my food comes from”.

Chart 4: Individual responses summarised as supporting/buying foods from specific areas (responses greater than 1%)



Approximately one in six respondents who had rated country of origin labelling as important said that they like to buy/support British food (16%) and to buy/support local food (14%).

Chart 5: Individual responses summarised as environmental concerns (responses greater than 1%)

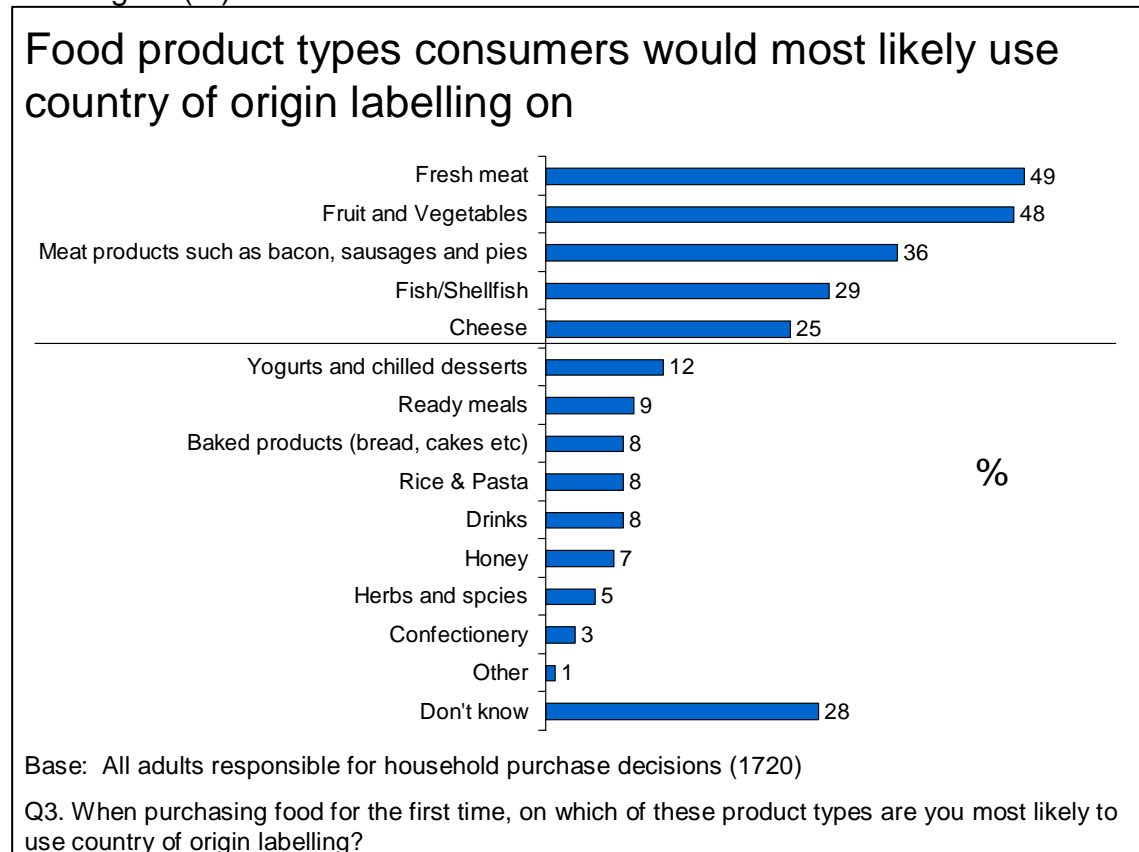


Around one in ten (9%) respondents who rated country of origin labelling as important gave food miles as a reason for this.

3. Food products country of origin labelling is most likely to be used on

Respondents were asked to choose five food products from a list of fourteen that they would most likely use country of origin labelling on.

Chart 6: Products respondents were most likely to use country of origin labelling on (%)



Fresh meat and fruit and vegetables are the food products on which respondents are most likely to use country of origin labelling, with around half of respondents selecting these two categories (49% and 48% respectively). Meat products (36%), fish/shellfish (29%) and cheese (25%) were all chosen by a quarter or more of respondents.

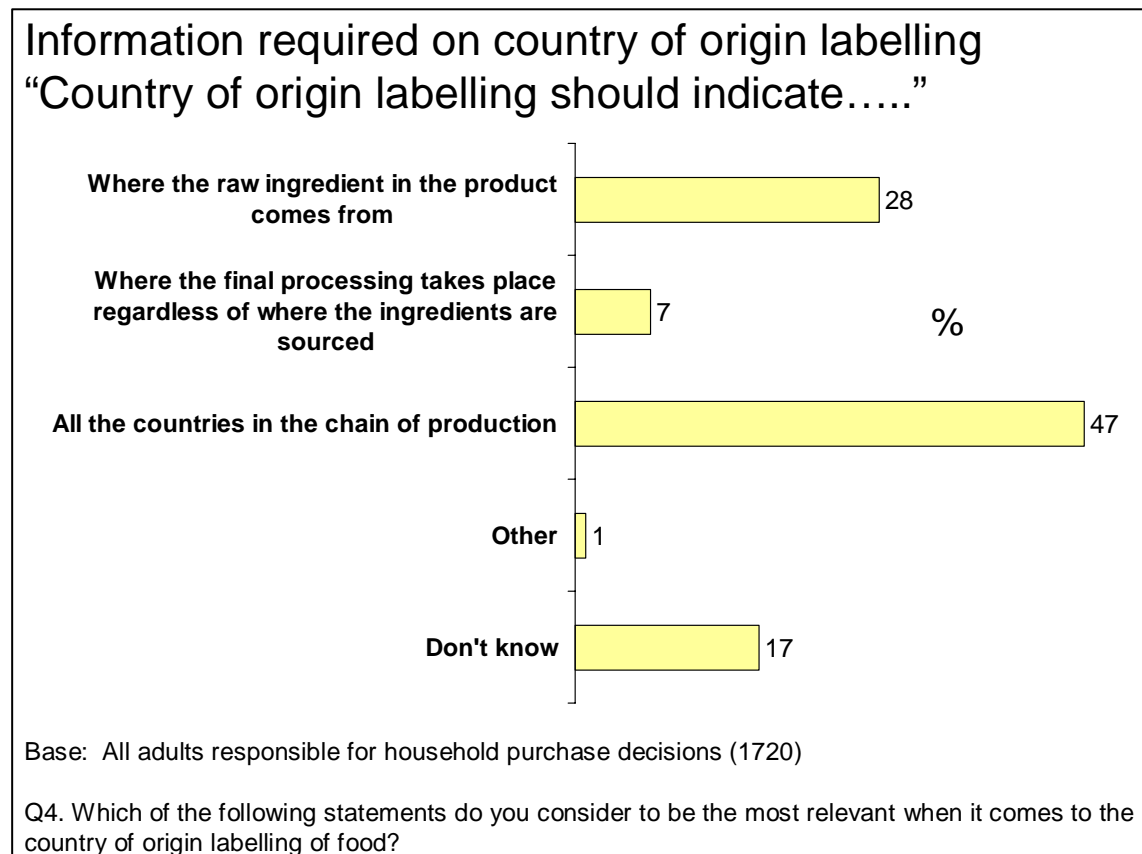
Understandably, those respondents who rated country of origin labelling to be important, were most likely to give a response to this question (53% of those who did not deem country of origin labelling to be important responded “don’t know” to this question), however the top five products are the same for both groups of respondents. Chart 8 in Appendix 3 shows the products selected by those who rated country of origin labelling to be important.

Despite there being no difference between men and women in the importance of country of origin labelling, there were some differences in the responses to this question. Women were more likely to give any response (25% responded don’t know in comparison to 31% of men) and to select fresh meat, fruit and vegetables and fish/shellfish whilst men were more likely than women to select ready meals and drinks.

4. Information that should be included on country of origin labelling

In the final part of the survey respondents were shown a list of statements and asked which they felt was most relevant to the country of origin labelling of food, in order to ascertain the type of information consumers want. Chart 7 below shows the findings.

Chart 7: Information that should be included on country of origin labelling (%)



Nearly half (47%), of respondents felt that country of origin labelling should indicate all of the countries in the chain of production, with the majority of the remaining sample (28%) choosing that it should indicate where the raw ingredient in the product comes from. Only 7% thought that it should indicate where the final processing takes place regardless of where the ingredients are sourced.

As was seen in the previous question, those respondents who did not feel country of origin labelling to be important were more likely to answer “don’t know” to this question (32% in comparison to 4%). However, the majority answer for both groups was the same (all countries in the chain of production). Chart 9 in Appendix 3 shows the response to this question from those who rated country of origin labelling as important.

Appendix 1: Questionnaire

SHOW SCREEN

Q.X Can you tell me which of the following statements best describes who is responsible for household purchase decisions in your household?

- 01: Always me
- 02: Mostly me
- 03: About equal
- 04: Mostly someone else
- 05: Always someone else
- (DK)

(route: If 01-03 coded at Q.X ask Q.1; others close)

The Food Standards Agency, a government body, is currently seeking consumer opinion on Country of Origin information on food labels. Country of Origin information is currently legally required on certain foods, and the Agency would appreciate you answering the following questions.

SHOW SCREEN

Q.1 When purchasing a food product for the first time, how important do you consider country of origin labelling on food products to be?

- 01: Very important
- 02: Quite important
- 03: Not very important
- 04: Not at all important
- (DK)

(route: ask Q.2 if 01 or 02 coded at Q.1, others go to Q.3)

Q.2 And why do you say that?
PROBE FULLY

(open ended)

SHOW SCREEN – MULTICHOICE (MAX 5)

Q.3 When purchasing food for the first time, on which of these product types are you most likely to use Country of Origin labelling? Please select up to 5 product types
PROBE FULLY

(scripter: randomise list)

- 01: Fresh meat
- 02: Meat products – such as bacon, sausages and pies
- 03: Ready meals
- 04: Fish\shellfish
- 05: Fruit and vegetables
- 06: Confectionary
- 07: Baked products (bread, cakes, etc)
- 08: Herbs and spices
- 09: Honey
- 10: Cheese
- 11: Yogurts and chilled desserts
- 12: Drinks
- 13: Rice and pasta
- 14: Other (specify)
- (DK)

SHOW SCREEN – MULTICHOICE

Q.4 Which of the following statements do you consider to be the most relevant when it comes to the country of origin labelling of food?

- 01: Country of origin labelling should indicate where the raw ingredient in the product comes from
- 02: Country of origin labelling should indicate where the final processing takes place regardless of where the ingredients are sourced
- 03: Country of origin labelling should indicate all the countries in the chain of production (origin of raw ingredients, where the food was processed, where the food was packaged)
- 04: Other (specify)
- (DK)

Appendix 2: Sample profile

(all adults responsible for household purchase decisions)

	<u>Unweighted</u>	<u>Weighted</u>
Total	1720	1603
Sex: Male	692	707
Female	1028	896
Age: 16-25	156	121
26-35	250	283
36-45	291	328
46-55	237	239
56-65	290	288
66+	496	343
Social class: AB	305	310
C1	450	480
C2	328	311
DE	637	501
Children in HH	504	520
No children in HH	1216	1083
Government region:		
North East	72	66
North West	194	175
Yorks and Humber	139	136
East Midlands	125	119
West Midlands	134	125
East of England	156	150
London	219	210
South East	224	201
South West	161	146
Wales	87	81
Scotland	157	147
Northern Ireland	52	47

Appendix 3: Additional tables and charts

Table 3: Importance of country of origin labelling by government region

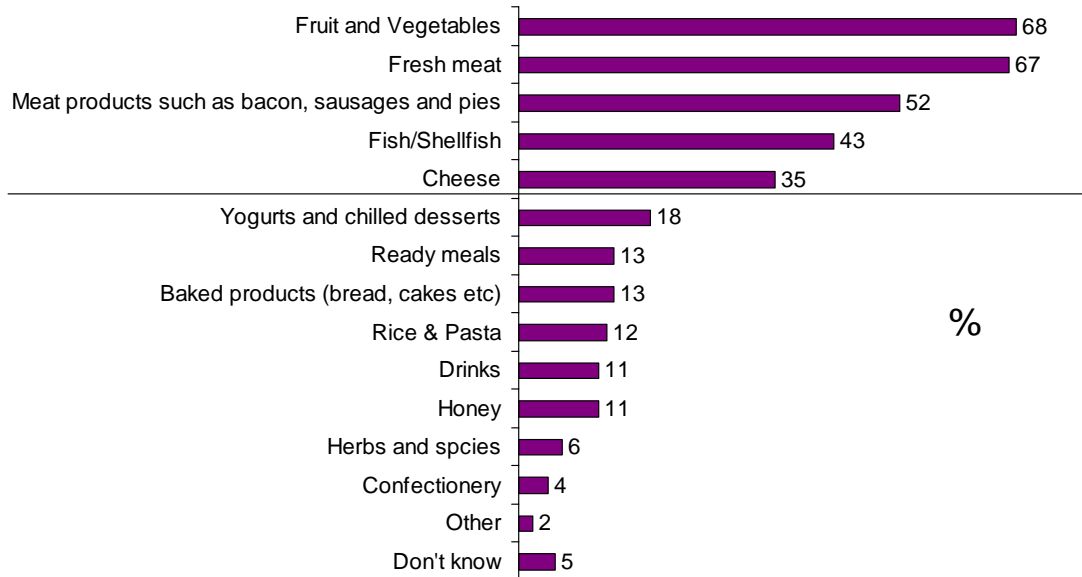
	<i>Base size</i>	Net: Important	Net: Not important	Don't know
All shoppers	1720	54	45	1
North east	72*	55	43	2
North west	194	48	51	1
Yorks & Humberside	139	47	52	1
East Midlands	125	50	50	-
West Midlands	134	49	50	1
East of England	156	59	40	1
London	219	52	48	-
South East	224	60	39	1
South West	161	64	35	1
Wales	87*	50	49	1
Scotland	157	51	48	1
N. Ireland	52*	65	32	3

*Small base size

Highlighted figures are significantly higher than at least one other sub-group

Chart 8: Products respondents who rated country of origin labelling to be important were most likely to use country of origin labelling on (%)

Food product types consumers would most likely use country of origin labelling on (respondents who rated COOL important)



Base: All those who stated very or quite important at Q1 (931)

Q3. When purchasing food for the first time, on which of these product types are you most likely to use country of origin labelling?

Chart 9: Information that should be included on country of origin labelling, respondents who rated it as important (%)

