SEAFISH

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The Possibilities of Labelling Fish by its Region of Origin

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The Possibilities of Labelling Fish by its Region of Origin

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Would people be more inclined to buy fish if it were identified in some way so as to indicate that it originates from a particular area of Great Britain or from a specific port?

Would they favour fish that they knew to be locally landed, in preference to non-local fish?

. . . and would they be willing to pay a premium price for fish that is identified in these ways?

There has been a lot of speculation in the industry recently about these matters. No one can answer the questions with absolute certainty and traders have to decide for themselves what, if any, advantages there might be in labelling fish to indicate its origin; this report attempts to provide guidance to help them.

To create an objective, factual basis for exploration, Seafish commissioned a survey among a structured sample of principal shoppers in Great Britain in May 1999. The statistics that follow and the conclusions presented are drawn from the findings of that survey.

A summary of the main conclusions is provided overleaf. This is followed by a brief outline of the survey itself - the actual questions put to the respondents are set out, in the order they were asked, within the Results section which follows in turn. In the final section, the main implications of the findings are elaborated upon. The Appendices have been included for those interested in seeing how responses differ according to consumer type eg. how do 'mainly natural fish' consumers differ in their responses to labelled fish from 'mainly processed fish' consumers.

- *What form of fish do you mostly eat (natural, processed or both) and how often do you eat it?*
- *How much do certain factors influence you when you purchase fish?*
- *When you buy fish or other foods, do you always/sometimes/never check the place of origin?*
- *Are there any country or regional labels that would encourage you to buy fish?*
- *Would you be willing to pay more for fish labelled LOCALLY LANDED . . . would you even consider buying it if sold at the same price as other fish?*
- *Would you be willing to pay more for fish labelled SCOTTISH . . . would you even consider buying it if sold at the same price as other fish?*

In order to examine precisely these questions, Seafish commissioned Taylor Nelson Sofres' specialist omnibus service, Omnimas, to conduct a survey in May 1999.

A random sample of 1,572 Principal Shoppers (aged +16 years) throughout Great Britain was questioned by way of face-to-face interviews conducted in respondents' own homes. Respondents were predominantly female, although 27% of these principal shoppers were male.

NB: the sample can be 'grossed up' to represent the adult population of Great Britain. This means that the following percentages contained within this report can be taken to reflect proportions of the total adult population of Great Britain, except where stated otherwise.

■ Why was SCOTTISH the only specific regional label to be tested?

- previous research commissioned by Seafish, again throughout Great Britain, clearly indicated that the concept of fish labelled SCOTTISH has a particularly strong resonance with the fish consuming public, and indeed with many members of the trade.
- not only that, but Scotland was the **only** region spontaneously associated with any kind of fish.

So, for the purpose of the current exercise, it was felt that if a Scottish label did not appeal to consumers, then no other specific regional label would.

- Whatever the advantages of regional labelling may be, there are two overriding findings that must never be lost sight of:

  - **Of all the things that influence people when they are buying fish, regionality is the one that least concerns them.**

  - **People will not be motivated to buy on the strength of local/regional identification alone. Marked fish would have to look clearly superior to other fish on offer and the price would have to be right.**

- Allowing for the two foregoing caveats, consumer support could be expected for fish labelled and sold in its own territory:

  - **A LOCALLY LANDED label could have some appeal in most regions of the country, especially Scotland.**

  - **The attraction of fish labelled LOCALLY LANDED would appeal to every category of consumer in every location and would apply no matter what form of fish they prefer to buy.**

  - **A SCOTTISH label could have a fairly positive reception in Scotland, and could even command a price premium there, particularly among people who eat mainly natural fish. The same thing would hold, though probably less strongly, for other regional labels on their home ground.**

- Marketing regionally labelled fish outside its own territory is unlikely to offer any advantage:

  - **A regional label would be met mostly with indifference or even with negative feelings outside its own region.**

- Consumers likely to be influenced by a regional label would fall within a small, tightly defined group:

  - **The people most likely to be positively interested in a SCOTTISH label, for example, would be those who:**

  - **are older**

  - **are Scottish**

  - **consume mainly natural fish**

  - **are in the AB socio-economic group**

4.1 Characteristics of the Sample

Q.1(a) Which of the following statements best describes the types of fish you eat at home?

- *I mainly eat fresh or frozen fish - (not bought in batter/breadcrumbs, a sauce or in a pie etc. ie. natural)*
- *I mainly eat processed fish – (bought in batter, breadcrumbs, a sauce or in a pie etc.)*
- *I eat all types of fish, both fresh and processed*
- *I never eat fish*

The remit of this research was essentially to assess the appeal of regional labelling for all fish amongst all fish consumers, and this forms the main focus of the report. However, this question gives a picture of the kind of fish these respondents are eating, as shown below.

THOSE WHO EAT…	*No.*	*%*
Mainly natural fish	*620*	*46.4*
Mainly processed fish	*271*	*20.3*
Both types of fish	*444*	*33.3*
Total	*1,335*	*100.0*

The proportion of respondents claiming to be eaters of mainly natural fish across the whole sample is 46%, with 20% consuming mainly processed fish and one third claiming to eat both types. Below, the various demographic groups containing a higher than expected percentage of such consumers are shown:

EAT MAINLY NATURAL FISH (Expected proportion based on total sample = 46%)

- 55-64 year olds 57% (n = 107)
- 65+ year olds 54% (n = 167)
- Scotland 59% (n = 73)
- Greater London 53% (n = 112)

EAT MAINLY PROCESSED FISH (Expected proportion based on total sample = 20%)

- 25-34 year olds 27% (n = 72)
- 35-44 year olds 28% (n = 78)
- Household size of 5+ 26% (n = 35)
- North* 33% (n = 23)

EAT BOTH TYPES OF FISH (Expected proportion based on total sample = 33%)

- Social classes AB 40% (n = 82)
- East Anglia* 40% (n = 18)

(* = based on small numbers so treat with caution)

The following three questions complement Question 1(a), by showing the frequency with which respondents are consuming these categories of fish.

Q.1(b) And how often do you eat fresh or frozen fish? [asked only of 'fresh/frozen' consumers]

MAINLY NATURAL FISH EATERS	*No.*	*%*
Frequency of consumption:		
3+ times per month	*428*	*69*
1 or 2 times per month	*136*	*22*
less than once per month	*56*	*9*
Total	*620*	*100*

Demographic trends for those eating mainly natural fish **most frequently:**

3+ TIMES PER MONTH (Expected proportion based on total sample = 69%)

- 55-64 year olds 76% (n = 81)
- 65+ year olds 82% (n = 137)
- social classes AB 76% (n = 72)
- Scotland* 76% (n = 55)
- North* 76% (n = 18)
- East Anglia* 80% (n = 11)

(* = based on very small numbers so treat with caution)

Q.1(c) And how often do you eat processed fish? [asked only of 'processed' consumers]

MAINLY PROCESSED FISH EATERS	*No.*	*%*
Frequency of consumption:		
3+ times per month	*146*	*54*
1 or 2 times per month	*87*	*32*
less than once per month	*35*	*13*
Don't know	*3*	*1*
Total	*271*	*100*

(demographic trends are not shown here due to the small number of respondents involved)

Q.1(d) And how often do you eat any type of fish? [asked only of 'any type' consumers]

ANY TYPE OF FISH EATERS	*No.*	*%*
Frequency of consumption:		
3+ times per month	*329*	*74*
1 or 2 times per month	*84*	*19*
less than once per month	*27*	*6*
Don't know	*4*	*1*
Total	*444*	*100*

Demographic trends for those eating both types of fish **most frequently:**

3+ TIMES PER MONTH	(Expected proportion based on total sample = 74%)
- 65+ year olds	90% (n = 89)
- social classes AB*	81% (n = 64)
- Yorkshire / Humberside*	82% (n = 29)
- Wales*	83% (n = 12)

(* = based on very small numbers so treat with caution)

4.2 Factors Influencing Fish Purchase Decisions

Q.2 Now, thinking about when you buy any type of fish to eat at home, on a scale of 1-10, where 10 is very important and 1 is not very important, please tell me how important each of the following is. So how important is . . .

- *the price of the fish*
- *the brand/label/manufacturer of the pack/cut of the fish*
- *which shop you buy the fish from*
- *the country or region of origin of the fish*
- *special offers on the fish*
- *the look of the fish*
- *the pack/cut that represents a healthier choice*
- *the environmental aspects of the fish eg wild/farmed*
- *the pack/cut of fish is the one you usually buy*
- *the pack/cut of fish is locally produced/caught*

This is an extremely useful question because it gives an idea of just how important respondents consider regional labelling i) within the context of other decision-affecting factors; ii) in relation to their current behaviour; and iii) before they are aware of the fact that regional labelling is what the survey is really about. Using a scale in this way – where two or more factors can have the same score - is also a fairer, more realistic way of measuring importance as opposed to forcing respondents to rank the items in order.

The table to follow shows the percentage of respondents assigning a score of 1 – 10 to each factor. So for example, the top left-hand corner in the main part of the table shows that 42% (actual number = 560) of respondents gave 'the look of the fish' a score of 10, indicating that for these people, the look of the fish is 'extremely important' when deciding which fish to purchase.

IMPORTANCE RATING	The Look of the Fish	The Price	The Shop	Healthy Choice	Special Offers	Usual Purchase / Habit	Brand / Label etc	Environ-mental concern	Locally Caught etc	Region / Country of Origin
10 very important	**42** (560)	**22** (294)	**16** (214)	**16** (214)	**15** (200)	**13** (174)	**11** (147)	**11** (147)	**10** (133)	**8** (107)
9	**15** (200)	**10** (133)	**9** (120)	**8** (107)	**9** (120)	**8** (107)	**6** (80)	**6** (80)	**5** (67)	**5** (67)
8	**17** (227)	**17** (227)	**15** (201)	**16** (214)	**15** (200)	**17** (227)	**15** (200)	**9** (120)	**11** (147)	**7** (93)
7	**8** (107)	**12** (160)	**10** (133)	**11** (147)	**12** (160)	**13** (174)	**8** (107)	**9** (120)	**7** (93)	**5** (67)
6	**5** (67)	**9** (120)	**9** (120)	**11** (147)	**8** (107)	**10** (133)	**8** (107)	**8** (107)	**8** (107)	**6** (80)
5	**5** (67)	**14** (187)	**12** (160)	**15** (200)	**13** (174)	**14** (187)	**15** (200)	**17** (227)	**15** (201)	**13** (174)
4	**1** (13)	**3** (40)	**4** (53)	**4** (53)	**5** (67)	**6** (80)	**5** (67)	**5** (67)	**6** (80)	**8** (107)
3	**2** (27)	**5** (67)	**7** (93)	**6** (80)	**6** (80)	**6** (80)	**8** (107)	**9** (120)	**9** (120)	**11** (147)
2	**2** (27)	**3** (40)	**5** (67)	**4** (53)	**5** (67)	**4** (53)	**8** (107)	**7** (93)	**7** (93)	**10** (133)
1 not important	**3** (40)	**5** (67)	**13** (174)	**9** (120)	**12** (160)	**9** (120)	**16** (213)	**19** (254)	**22** (294)	**27** (360)
Total % (Total number)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)	**100** (1,335)

There is a lot of information contained in this table, but a quick way of spotting the main points of interest is to read along the top two and bottom two rows in the main body of the table. By doing so, two main findings clearly emerge:

- when it comes to buying fish, two particularly crucial motivators stand out:
  - the look of the fish
  - the price of the fish
- conversely, the two **least** important motivators are:
  - the country / region of origin
  - whether or not the fish was locally produced / caught

Obviously for the purpose of this research the matter of further interest here is those people who indicated that country/region of origin and/or locally produced/caught fish was important to them.

Demographic trends for those rating country/region of origin **important/very important:**

A SCORE OF 8, 9 OR 10 (Expected proportion based on total sample = 20%)

- 55-65 year olds 28% (n = 52)
- 65+ year olds 29% (n = 89)
- Scotland 40% (n = 49)

Demographic trends for those rating locally produced/caught **important/very important:**

A SCORE OF 8, 9 OR 10 (Expected proportion based on total sample = 26%)

- 55-65 year olds 33% (n = 62)
- 65+ year olds 35% (n = 107)
- Yorkshire / Humberside* 32% (n = 29)
- Scotland 40% (n = 49)

(* = based on small numbers so treat with caution)

4.3 Regional Influences on Purchases of Fish and Other Main Proteins

Q.3 When shopping for fruit & vegetables (chicken, fish, beef, lamb), do you ever decide what fruit & vegetables (chicken, fish, beef, lamb) to buy depending on the country or region that it comes from?

In the same way that the previous question was designed to gauge the current relevance of regional labelling for fish in the context of other influences on the purchasing decision, this question looked at the current relevance of regional labelling in the wider context of other major proteins as well as fish.

The table below shows respondents' claimed behaviour in relation to the various food categories.

	Beef		Lamb		Fruit/Veg		Chicken		Fish	
	%	No.	%	No.	%	No.	%	No.	%	No.
I always look for the country of origin	28	374	26	347	15	200	13	174	11	147
I sometimes look for this	15	200	17	227	21	280	11	147	13	174
I rarely/never look at this	44	587	47	627	63	841	72	961	75	1001
No response	13	174	10	134	1	14	4	53	1	13
Total	100	1335	100	1335	100	1335	100	1335	100	1335

The first point here more or less continues on from the findings of the previous question:

- **that is, for the majority of respondents, country of origin rarely - if ever - affects their purchase decisions for any product.**

- **moreover, compared with other major foods, fish is the least likely to be judged in terms of country of origin.**

The picture for chicken is very similar to that for fish, and this may reflect the fact that details of origin simply do not feature strongly with these foods. On the other hand, beef and lamb appear to elicit a slightly different reaction. This may well have something to do with recent health scares affecting both meat types and which have pushed the issue of traceability to the fore. It may also be the case that existing regional associations eg. Scotch beef and Welsh lamb, are already more firmly established in the public consciousness.

- **in terms of demographics, it is consistently the same people who 'always/sometimes' consider country of origin, irrespective of the food involved.**

The example of fish is used to below to demonstrate which groups these are:

Demographic trends for those who 'always/sometimes' consider country of origin:

FISH ONLY	(Expected proportion based on total sample = 24%)
- 55-65 year olds	31% (n = 58)
- 65+ year olds	30% (n = 92)
- social classes AB	35% (n = 71)
- Scotland	41% (n = 50)

4.4 Country/Regional Labels which would Encourage Fish Purchasing

Q.4(a) Certain regions and countries are often linked with types of food. For example, New Zealand lamb, or Jersey potatoes. Are there any regions or countries which if they were linked with fish would encourage you to buy them?

Up to this point questions have concentrated on claimed current behaviour. From now on we are dealing with claimed intentions. Question 4(a) was designed to elicit a spontaneous reaction as to whether place of origin might influence purchasing behaviour. The results are shown below.

UNPROMPTED ASSOCIATIONS	*No.*	*%*
Yes	*320*	*24*
No	*948*	*71*
Don't know	*67*	*5*
Total	*1,335*	*100*

- **Not even a quarter of respondents could, unprompted, conceive of a country or region which if linked with fish would encourage them to buy it.**

Demographic trends for those who could conceive of a country/region for fish:

YES (Expected proportion based on total sample = 24%)

- 55-65 year olds 31% (n = 58)
- 65+ year olds 29% (n = 89)
- social classes AB 36% (n = 73)
- Scotland 35% (n = 43)

Q.4(b) [If yes] Which countries or regions would that be?

Probing further, those respondents answering 'yes' to the above were asked, unprompted, which countries or regions they might then positively associate with fish.

SPECIFIED ASSSOCIATIONS	*No.*	*% (of those giving a resoponse)*	*% (of **all** respondants)*
Scotland	*80*	*25*	*6*
Britain	*45*	*14*	*3*
Iceland	*13*	*4*	*1*
England	*10*	*3*	*0.8*
New Zealand	*10*	*3*	*0.8*
'Local costal waters'	*10*	*3*	*0.8*
Caribbean/West Indies	*6*	*2*	*0.4*
English East coast areas	*3*	*1*	*0.2*
All others	*42*	*13*	*3*
Don't know	*103*	*32*	*8*
No association/no response	-	-	*76*
Total	*321*	*100*	*100 (1,335)*

Two points in particular are worth making here:

- **Scotland is by far the most popular country/region associated with fish, amongst those respondents who expressed a preference.**
- **However, the 80 respondents who mentioned Scotland represent a mere 6% of the total fish consuming population.**

Demographic trends for those mentioning Scotland in relation to fish:

SCOTLAND (Expected proportion based on total sample = 25%)

- 35-44 year olds* 33% (n = 20)
- social classes AB* 37% (n = 26)
- Scotland* 76% (n = 33)
- North* 77% (n = 5)

(* = based on very small numbers so treat with caution)

4.5 The Potential Impact of LOCALLY LANDED Fish Labelling

Q.5(a) I would now like you to think about the idea of LOCALLY LANDED fish. If fish labelled LOCALLY LANDED was slightly more expensive than other fish, would you be more or less likely to buy it?

Q.5 (b) If fish labelled LOCALLY LANDED was the same price as other fish, would you be more or less likely to buy it?

Question 5 was divided into two parts in order to separate out the impact of a price premium on purchasing intentions. The table below shows the results in detail.

If fish labelled 'LOCALLY LANDED' was the same price as other fish, I would be . . .	*No.*	*%*	**If fish labelled 'LOCALLY LANDED' was more expensive than other fish, I would be . . .**	*No.*	*%*
. . . more likely to buy it	*761*	*57*	*. . . more likely to buy it*	*547*	*41*
. . . less likely to buy it	*80*	*6*	*. . . less likely to buy it*	*254*	*19*
. . . neither more or less likely	*467*	*35*	*. . . neither more or less likely*	*507*	*38*
. . . unsure/don't know	*27*	*2*	*. . . unsure/don't know*	*27*	*2*
Total	*1,335*	*100*	*Total*	*1,335*	*100*

- **Over half of the respondents expressed a willingness to purchase LOCALLY LANDED fish – if no price premium were added.**

However

- **This proportion declined to 41% when the more expensive option was considered.**

Demographic trends for those willing to purchase **at no extra cost:**

MORE WILLING TO PURCHASE (Expected proportion based on total sample = 57%)

- 55-64 year olds 63% (n = 118)
- social classes AB 62% (n = 126)
- East Anglia* 66% (n = 29)
- Scotland 72% (n = 88)
- South West 74% (n = 93)

Demographic trends for those willing to purchase **at a premium cost:**

MORE WILLING TO PURCHASE (Expected proportion based on total sample = 41%)

- 55-64 year olds 53% (n = 99)
- 65+ year olds 55% (n = 168)
- Yorkshire / Humberside 56% (n = 51)
- Scotland 59% (n = 72)

(* = based on small numbers so treat with caution)

4.6 The Potential Influence of SCOTTISH Fish Labelling

Q.6(a) I would now like you to think about the idea of SCOTTISH fish. If fish labelled SCOTTISH was slightly more expensive than other fish, would you be more or less likely to buy it?

Q.6 (b) If fish labelled SCOTTISH was the same price as other fish, would you be more or less likely to buy it?

This question followed the same format as Question 5 for similar reasons.

If fish labelled 'SCOTTISH' was the same price as other fish, I would be . . .	*No.*	*%*	**If fish labelled 'SCOTTISH' was more expensive than other fish, I would be . . .**	*No.*	*%*
. . . more likely to buy it	*614*	*46*	*. . . more likely to buy it*	*414*	*31*
. . . less likely to buy it	*80*	*6*	*. . . less likely to buy it*	*280*	*21*
. . . neither more or less likely	*614*	*46*	*. . . neither more or less likely*	*614*	*46*
. . . unsure/don't know	*27*	*2*	*. . . unsure/don't know*	*27*	*2*
Total	*1,335*	*100*	*Total*	*1,335*	*100*

- **It is clear that fish labelled SCOTTISH is a less attractive proposition overall.**
- **Moreover in excess of a fifth would be put off purchasing fish labelled in this way and at a higher price.**
- **Again, not surprisingly, willingness to purchase declines when prospective price increases.**

Demographic trends for those willing to purchase SCOTTISH fish **at no extra cost:**

MORE WILLING TO PURCHASE (Expected proportion based on total sample = 46%)

- 55-64 year olds 57% (n = 107)
- 65+ year olds 55% (n = 168)
- West Midlands 55% (n = 78)
- Scotland 85% (n = 104)

Demographic trends for those willing to purchase SCOTTISH fish **at a premium cost:**

MORE WILLING TO PURCHASE (Expected proportion based on total sample = 31%)

- 55-64 year olds 42% (n = 79)
- 65+ year olds 44% (n = 135)
- social classes AB 42% (n = 86)
- Scotland 66% (n = 81)

- **If respondents in Scotland are removed from the equation, the figures decline quite dramatically, to 38% in favour if price remained comparable to that for other fish, and down to only 25% in favour of more expensive fish.**

Claimed intentions: LOCALLY LANDED

- While at face value the findings reported here appear to support the proposition of regional labelling for fish, closer examination of the data suggests that the case is not so clear-cut.

- **Only when prompted and only with price held constant,** did over half the respondents (57%) express a potential interest in buying fish labelled LOCALLY LANDED.

BUT

- **unprompted,** only 24% had initially indicated that they felt any regional label could positively influence their fish purchasing decisions.

- **unprompted**, less than 1% (0.8%) spontaneously referred to such a label (local coastal waters) when asked what particular label might encourage them to purchase fish.

- **Where a higher cost is anticipated, the appeal of the label declined** with less than half (41%) now saying they would consider buying it.

Comment: Given that in reality labelled fish would carry a price premium, it is the latter point which is crucial. All that can be concluded at this stage is that fish labelled LOCALLY LANDED may have a slight, but by no means great, advantage over others.

Claimed intentions: SCOTTISH

- **Even with price held constant,** less than half the respondents expressed a potential interest in buying fish labelled Scottish.

  - **unprompted,** only 24% had initially indicated that they felt any regional label could positively influence their fish purchasing decisions.

  - **unprompted,** only 6% of all respondents spontaneously mentioned SCOTTISH when asked what particular regional/ country label might encourage them to purchase fish.

MOREOVER

- removing respondents in Scotland, only 38% remain interested when price is stable.

- **Where a higher cost is anticipated, the appeal of the label declined,** with less than one third now claiming they would consider buying such fish.
    - **removing respondents in Scotland, only 25% remain interested at the higher cost.**

Comment: The very fact that such claims of interest are not spread across the sample but rather are biased towards a small section of respondents is a drawback. Also, given the above, the case for a regional label that extends outside of its immediate locality, is somewhat weak.

So far we have considered only prospective behaviour, and we know from previous qualitative research that people have a tendency to over-report intentions to buy. So how do these claimed intentions compare with claimed current behaviour?

A number of contradictions are readily apparent:

- In terms of current claimed practice, **country/region of origin** and **locally landed/ produced** are the two least important influences on the fish-purchasing decisions of the consumer.
- What is more, fish is also the least likely, in the context of other major proteins, to be selected in terms of country/region of origin.

Comment: Claimed current behaviour will be a more realistic indicator of future performance than claimed intentions, therefore the likelihood of uptake of regionally labelled fish will be less than that reported here.

One area in which there are consistencies concerns the demographic groupings:

- That is, in both prospective and current claimed behaviour the same groups of respondents appear to show an interest in SCOTTISH labelled fish ie. Scottish, ABs and older respondents all of whom are more likely to be consumers of mainly natural fish

Comment: As noted above, such bias works against the wider acceptance of such a label.

FACTORS INFLUENCING FISH PURCHASING - RESPONSES FROM CONSUMERS OF 'MAINLY NATURAL' FISH 39% of sample (n=620)

IMPORTANCE RATING	The Look of the Fish	The Price	The Shop	Special Offers	Healthy Choice	Usual Purchase / Habit	Brand / Label etc	Environ-mental concern	Locally Caught etc	Region / Country of Origin
10 very important	**48** (298)	**23** (142)	**22** (136)	**15** (93)	**19** (117)	**15** (174)	**11** (68)	**12** (74)	**13** (81)	**11** (68)
9	**16** (100)	**9** (56)	**10** (62)	**8** (50)	**9** (55)	**8** (107)	**6** (37)	**6** (37)	**6** (37)	**7** (43)
8	**15** (93)	**18** (112)	**17** (105)	**15** (93)	**16** (100)	**19** (227)	**15** (93)	**10** (62)	**14** (86)	**9** (55)
7	**7** (43)	**10** (62)	**10** (62)	**11** (68)	**11** (68)	**12** (174)	**7** (43)	**10** (62)	**8** (50)	**5** (31)
6	**3** (19)	**9** (55)	**8** (50)	**8** (50)	**11** (68)	**10** (62)	**8** (50)	**8** (50)	**7** (43)	**6** (37)
5	**5** (31)	**13** (81)	**12** (69)	**13** (81)	**15** (93)	**12** (187)	**14** (87)	**20** (124)	**15** (93)	**12** (69)
4	**1** (6)	**3** (19)	**2** (12)	**4** (25)	**4** (25)	**4** (25)	**5** (31)	**5** (31)	**4** (25)	**6** (37)
3	**2** (12)	**6** (37)	**5** (31)	**7** (43)	**4** (25)	**6** (37)	**7** (43)	**7** (43)	**8** (50)	**10** (62)
2	**1** (6)	**4** (25)	**4** (25)	**5** (31)	**3** (19)	**4** (25)	**8** (50)	**6** (37)	**6** (37)	**11** (68)
1 not important	**2** (12)	**5** (31)	**11** (68)	**14** (86)	**8** (50)	**10** (120)	**19** (118)	**16** (100)	**19** (118)	**24** (150)
Total % (Total number)	**100** (620)	**100** (620)	**100** (620)	**100** (620)	**100** (620)	**100** (620)	**100** (620)	**100** (620)	**100** (620)	**100** (620)

- Country/region of origin remains the least important factor for this sub-sample
- Not surprisingly, brand etc. declines and outlet increases in importance for this group
- Locally landed/caught becomes the third least important factor

Those more likely than average to consider the following important (ie. giving a score of 8–10):

REGION OF ORIGIN (Expected proportion based on sample = 27%)

- 65+ years 35% (n = 57)
- Scotland* 56% (n = 40)

LOCALLY PRODUCED FISH (Expected proportion based on sample = 33%)

- 65+ years 44% (n = 73)
- Scotland* 53% (n = 38)

(* = based on small numbers so treat with caution)

FACTORS INFLUENCING FISH PURCHASING - RESPONSES FROM CONSUMERS OF 'MAINLY PROCESSED' FISH 17% of sample (n=271)

IMPORTANCE RATING	The Look of the Fish	The Price	The Shop	Special Offers	Healthy Choice	Usual Purchase / Habit	Brand / Label etc	Environ-mental concern	Locally Caught etc	Region / Country of Origin
10 very important	**26** (70)	**17** (46)	**8** (22)	**14** (38)	**8** (22)	**10** (27)	**10** (27)	**6** (16)	**3** (8)	**4** (11)
9	**10** (27)	**13** (35)	**5** (13)	**12** (33)	**6** (16)	**9** (24.3)	**7** (19)	**5** (13)	**1** (3)	**2** (5)
8	**17** (46)	**15** (41)	**12** (33)	**14** (38)	**13** (35)	**17** (46)	**16** (43)	**6** (16)	**5** (13)	**5** (13)
7	**10** (27)	**15** (41)	**8** (22)	**6** (16)	**12** (33)	**13** (35)	**9** (24.5)	**7** (19)	**6** (16)	**1** (4)
6	**7** (19)	**8** (22)	**8** (22)	**8** (22)	**13** (35)	**9** (24.3)	**8** (22)	**8** (22)	**7** (19)	**6** (16)
5	**12** (33)	**18** (49)	**16** (43)	**16** (43)	**17** (46)	**18** (49)	**20** (54)	**17** (46)	**17** (47)	**14** (38)
4	**1** (3)	**2** (5)	**5** (13)	**6** (16)	**7** (19)	**6** (16)	**4** (11)	**3** (8)	**9** (24)	**10** (27)
3	**3** (8)	**5** (13)	**10** (27)	**8** (22)	**8** (22)	**6** (16)	**9** (24.5)	**13** (35)	**11** (30)	**13** (35)
2	**6** (16)	**1** (3)	**8** (22)	**4** (10)	**3** (8)	**3** (8)	**6** (16)	**8** (22)	**7** (19)	**10** (27)
1 not important	**8** (22)	**6** (16)	**20** (54)	**12** (33)	**13** (35)	**9** (24.3)	**11** (30)	**27** (74)	**34** (92)	**35** (95)
Total % (Total number)	**100** (271)	**100** (271)	**100** (271)	**100** (271)	**100** (271)	**100** (271)	**100** (271)	**100** (271)	**100** (271)	**100** (271)

The pattern of response in this sub-sample is similar to that for the sample as a whole:

- The look of the fish and price are most important
- *Region of origin* and *locally produced* labels are least important

The size of this sub-sample is so small, that any demographic differences appearing are unstable

FACTORS INFLUENCING FISH PURCHASING - RESPONSES FROM CONSUMERS OF 'ALL TYPES' OF FISH 29% of sample (n=444)

IMPORTANCE RATING	The Look of the Fish	The Price	The Shop	Special Offers	Healthy Choice	Usual Purchase / Habit	Brand / Label etc	Environ-mental concern	Locally Caught etc	Region / Country of Origin
10 very important	**43** (190)	**22** (98)	**13** (58)	**15** (66.5)	**16** (71)	**11** (49)	**13** (58)	**13** (58)	**9** (40)	**7** (31)
9	**16** (71)	**10** (44)	**9** (40)	**8** (35)	**9** (40)	**8** (35)	**5** (22)	**5** (22)	**5** (22)	**4** (18)
8	**18** (80)	**16** (71)	**13** (58)	**14** (62)	**19** (84)	**15** (67)	**16** (71)	**11** (49)	**10** (44)	**7** (31)
7	**7** (31)	**12** (53)	**11** (49)	**16** (71)	**12** (53)	**13** (58)	**9** (40)	**9** (40)	**7** (31)	**8** (35)
6	**6** (27)	**9** (40)	**10** (44)	**9** (40)	**10** (44)	**10** (44)	**7** (31)	**7** (31)	**9** (40)	**7** (31)
5	**4** (19)	**14** (62)	**12** (53)	**15** (67)	**16** (71)	**17** (76)	**15** (67)	**15** (67)	**15** (67)	**13** (58)
4	**1** (4)	**4** (18)	**5** (22)	**6** (27)	**3** (14)	**7** (31)	**7** (31)	**6** (27)	**8** (35)	**9** (40)
3	**2** (9)	**4** (18)	**9** (40)	**4** (18)	**5** (22)	**7** (31)	**8** (35)	**8** (35)	**14** (44)	**11** (49)
2	**1** (4)	**4** (18)	**6** (27)	**4** (18)	**4** (18)	**4** (18)	**7** (31)	**8** (35)	**7** (31)	**9** (40)
1 not important	**2** (9)	**5** (22)	**12** (53)	**9** (40)	**6** (26)	**8** (35)	**13** (58)	**18** (80)	**20** (90)	**25** (111)
Total % (Total number)	**100** (444)	**100** (444)	**100** (444)	**100** (444)	**100** (444)	**100** (444)	**100** (444)	**100** (444)	**100** (444)	**100** (444)

Again the pattern here is similar for the sample as a whole:

- The look of the fish and price are most important
- *Region of origin* and *locally produced* labels are least important

And again, the size of this sub-sample is so small, that any demographic differences appearing are unstable

LOCALLY LANDED

Responses from consumers of 'mainly natural' fish - 39% (n=620) of sample

If fish labelled 'LOCALLY LANDED' was the same price as other fish, I would be . . .	*No.*	*%*	**If fish labelled 'LOCALLY LANDED' was more expensive than other fish, I would be . . .**	*No.*	*%*
. . . more likely to buy it	*372*	*60*	*. . . more likely to buy it*	*298*	*48*
. . . less likely to buy it	*37*	*6*	*. . . less likely to buy it*	*99*	*16*
. . . neither more or less likely	*192*	*31*	*. . . neither more or less likely*	*204*	*33*
. . . unsure/don't know	*19*	*3*	*. . . unsure/don't know*	*19*	*3*
Total	*620*	*100*	*Total*	*620*	*100*

■ **Those with above average agreement with the statement 'more likely to buy it':**

If fish labelled 'LOCALLY LANDED' was the same price as other fish,	*No.*	*%*	**If fish labelled 'LOCALLY LANDED' was more expensive than other fish,**	*No.*	*%*
55-64 years	*71*	*66*	*55-64 years*	*61*	*57*
social classes AB	*63*	*66*	*social classes AB*	*93*	*56*
2 person households	*149*	*67*	*2 person households*	*57*	*57*
*Scotland**	*54*	*75*	*Scotland**	*46*	*64*
*Wales**	*16*	*71*	*Wales**	*15*	*69*
*South West**	*47*	*73*	*Yorks/Humberside**	*24*	*65*
Expected based on sub-sample average	*-*	*60*	*Expected based on sub-sample average*	*-*	*48*

(* = based on small numbers so treat with caution)

Responses from 'mainly processed' fish consumers - 17% (n=271) of sample

If fish labelled 'LOCALLY LANDED' was the same price as other fish, I would be . . .	*No.*	*%*	**If fish labelled 'LOCALLY LANDED' was more expensive than other fish, I would be . . .**	*No.*	*%*
. . . more likely to buy it	*130*	*48*	*. . . more likely to buy it*	*76*	*28*
. . . less likely to buy it	*13*	*5*	*. . . less likely to buy it*	*68*	*25*
. . . neither more or less likely	*125*	*46*	*. . . neither more or less likely*	*124*	*46*
. . . unsure/don't know	*3*	*1*	*. . . unsure/don't know*	*3*	*1*
Total	*271*	*100*	*Total*	*271*	*100*

■ **This sub-sample is too small to be able to treat any demographic breakdowns with confidence.**

Responses from consumers of 'all types of' fish - 29% (n=444) of sample

If fish labelled 'LOCALLY LANDED' was the same price as other fish, I would be . . .	*No.*	*%*	**If fish labelled 'LOCALLY LANDED' was more expensive than other fish, I would be . . .**	*No.*	*%*
. . . more likely to buy it	*257*	*58*	*. . . more likely to buy it*	*169*	*38*
. . . less likely to buy it	*27*	*6*	*. . . less likely to buy it*	*84*	*19*
. . . neither more or less likely	*147*	*33*	*. . . neither more or less likely*	*182*	*41*
. . . unsure/don't know	*13*	*3*	*. . . unsure/don't know*	*9*	*2*
Total	*444*	*100*	*Total*	*444*	*100*

Those with above average agreement with the statement 'more likely to buy it':

If fish labelled 'LOCALLY LANDED' was the same price as other fish,	*No.*	*%*	**If fish labelled 'LOCALLY LANDED' was more expensive than other fish,**	*No.*	*%*
*social classes AB**	*51*	*64*	*55+ years*	*82*	*54*
*single status**	*47*	*65*	*widow/divorce**	*49*	*52*
*South East**	*51*	*64*	*1 or 2 person households*	*123*	*50*
*Scotland**	*24*	*67*	*Scotland**	*20*	*56*
*South West**	*35*	*83*	*Yorks/Humberside**	*19*	*55*
*East Anglia**	*14*	*90*	*Wales**	*7*	*46*
			*South West**	*18*	*44*
Expected based on sub-sample average	*-*	*58*	*Expected based on sub-sample average*	*-*	*38*

(* = based on small numbers so treat with caution)

SCOTTISH

Responses from consumers of 'mainly natural' fish - 39% (n=620) of sample

If fish labelled 'SCOTTISH' was the same price as other fish, I would be . . .	No.	%	If fish labelled 'SCOTTISH' was more expensive than other fish, I would be . . .	No.	%
. . . more likely to buy it	317	51	. . . more likely to buy it	223	36
. . . less likely to buy it	43	7	. . . less likely to buy it	118	19
. . . neither more or less likely	254	41	. . . neither more or less likely	267	43
. . . unsure/don't know	6	1	. . . unsure/don't know	12	2
Total	620	100	Total	620	100

- **Those with above average agreement with the statement 'more likely to buy it':**

If fish labelled 'SCOTTISH' was the same price as other fish	No.	%	If fish labelled 'SCOTTISH' was the same price as other fish	No.	%
55-64 years	61	57	55-64 years*	46	46
65+ years	100	60	65+ years	80	48
social classes AB	57	60	social classes AB	51	54
Scotland*	65	90	widow/divorced	73	44
			single person households	79	46
North West*	39	58			
West Midlands*	38	57	Scotland	65	90
Expected based on sub-sample average	-	51	Expected based on sub-sample average	-	36

(* = based on small numbers so treat with caution)

Responses from 'mainly processed' fish consumers - 17% (n=271) of sample

If fish labelled 'SCOTTISH' was the same price as other fish, I would be . . .	No.	%	If fish labelled 'SCOTTISH' was more expensive than other fish, I would be . . .	No.	%
. . . more likely to buy it	106	39	. . . more likely to buy it	57	21
. . . less likely to buy it	13	5	. . . less likely to buy it	65	24
. . . neither more or less likely	149	55	. . . neither more or less likely	144	53
. . . unsure/don't know	3	1	. . . unsure/don't know	5	2
Total	271	100	Total	271	100

- **This sub-sample is too small to be able to treat any demographic breakdowns with confidence.**

Responses from 'all types' fish consumers - 29% (n=444) of sample

If fish labelled 'SCOTTISH' was the same price as other fish, I would be . . .	*No.*	*%*	**If fish labelled 'SCOTTISH' was more expensive than other fish, I would be . . .**	*No.*	*%*
. . . more likely to buy it	*200*	*45*	*. . . more likely to buy it*	*133*	*30*
. . . less likely to buy it	*31*	*7*	*. . . less likely to buy it*	*98*	*22*
. . . neither more or less likely	*204*	*46*	*. . . neither more or less likely*	*204*	*46*
. . . unsure/don't know	*9*	*2*	*. . . unsure/don't know*	*9*	*2*
Total	*444*	*100*	*Total*	*271*	*100*

Those with above average agreement with the statement 'more likely to buy it':

If fish labelled 'SCOTTISH' was the same price as other fish,	*No.*	*%*	**If fish labelled 'SCOTTISH' was more expensive than other fish,**	*No.*	*%*
55 years	*80*	*53*	*55-64 years**	*63*	*42*
widow/divorced	*50*	*53*			
*Scotland**	*28*	*78*	*Scotland**	*19*	*52*
*Yorks/Humberside**	*20*	*58*	*Yorks/Humberside**	*16*	*45*
*West Midlands**	*23*	*59*			
Expected based on sub-sample average	*-*	*45*	*Expected based on sub-sample average*	*-*	*30*

(* = based on small numbers so treat with caution)

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