European Commission

Special Eurobarometer 475

Summary

EU consumer habits regarding fishery and aquaculture products

Fieldwork
June-July 2018
Publication
December 2018

Survey requested by the European Commission,
Directorate-General for Maritime Affairs and Fisheries
and co-ordinated by the Directorate-General for Communication

Special Eurobarometer 475 – Wave EB89.3 – Kantar Public Brussels

Special Eurobarometer 475

Summary

EU consumer habits regarding fishery and aquaculture products

June-July 2018

Survey and report by Kantar Public Brussels on behalf of Kantar Belgium at the request of the European Commission, Directorate-General for Maritime Affairs and Fisheries

Survey co-ordinated by the European Commission, Directorate-General for Communication (DG COMM "Media Monitoring, Media Analysis and Eurobarometer" Unit)

Project title	Special Eurobarometer 475 – June/July 2018 “EU consumer habits regarding fishery and aquaculture products” Summary
Linguistic version	EN
Catalogue number	KL-03-18-547-EN-N
ISBN	978-92-79-98187-6 doi:10.2771/736497

http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm

TABLE OF CONTENTS

INTRODUCTION

The European Union is a major market for fishery and aquaculture products (FAPs). In nominal terms, the EU is the world's largest market for such products. Expenditure per capita on FAPs is only a third of that in Japan, the world leader, but more than three times as much as in the United States[1].

The European Commission's overall aim in this area is to secure a safe and stable supply of seafood, sustainable fisheries, healthy seas and prosperous coastal communities for today's Europeans and future generations[2]. This involves formulating, developing and implementing the Common Fisheries Policy (CFP)[3] – a set of rules for managing European fishing fleets, conserving fish stocks and managing the market for fishery and aquaculture products.

In order to properly develop and implement changes to policies such as the CFP, the European Commission regularly sources economic statistics relating to the state of the fisheries and maritime industry, but also seeks out the views of its citizens and stakeholders.

This **Special Eurobarometer** survey is the second on this topic, repeating questions first asked in a survey conducted in June 2016. It aims at improving understanding of the EU internal market for fishery and aquaculture products to allow operators to be more competitive and to support new strategies that can stimulate growth, strengthen economic activities in the internal market and lead to job creation. It will provide key information for operators to adapt their strategies to the changing needs of consumers and thus make the most of the opportunities of the Single Market.

The survey will also explore consumers' understanding and trust of the information that accompanies fishery and aquaculture products, given that the rules on the labelling of these products changed in December 2014. This information ensures consumer protection within the EU and allows citizens to make informed purchasing choices.

The main objectives of this survey are to:

- Understand consumer habits regarding fishery and aquaculture: how frequently do consumers eat and/or buy these products? What types of products do they buy? Where do they buy them?
- Find the factors that influences consumption;
- Explore the reasons for buying or eating fishery and aquaculture products, or not;
- Determine whether there is consumer preference for wild or farmed products, sea or freshwater products, processed or unprocessed products, or in terms of origin;
- Investigate what consumers think about the information accompanying fishery and aquaculture products and whether they trust information provided by the government, by certified authorities or by the brand or seller;
- Compare current figures with those from the June 2016 survey.

[1] 2018 edition of The EU Fish Market:
https://www.eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf
[2] Directorate-General for Maritime Affairs and Fisheries' Mission Statement:
http://ec.europa.eu/dgs/maritimeaffairs_fisheries/about_us/mission_statement/index_en.htm
[3] Common Fisheries Policy: http://ec.europa.eu/fisheries/cfp/index_en.htm

This survey was carried out by the Kantar Public Brussels network in the 28 Member States of the European Union between 23rd of June and 6th of July. A total of 27.734 EU citizens from different social and demographic categories were interviewed face-to-face at home and in their native language on behalf of the Directorate-General for Maritime Affairs and Fisheries.

The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Media monitoring, media analysis and Eurobarometer" Unit). A technical note on the manner in which the interviews were conducted by the institutes within the Kantar Public Brussels network is appended as an annex to this report. Also included are the interview methods and the confidence intervals.

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czechia	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28

* Cyprus as a whole is one of the 28 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU28 average.

We wish to thank the people throughout the European Union who have given their time to take part in this survey. Without their active participation, this study would not have been possible.

I. CONSUMER HABITS REGARDING FISHERY AND AQUACULTURE PRODUCTS

1 Frequency of eating fishery and aquaculture products

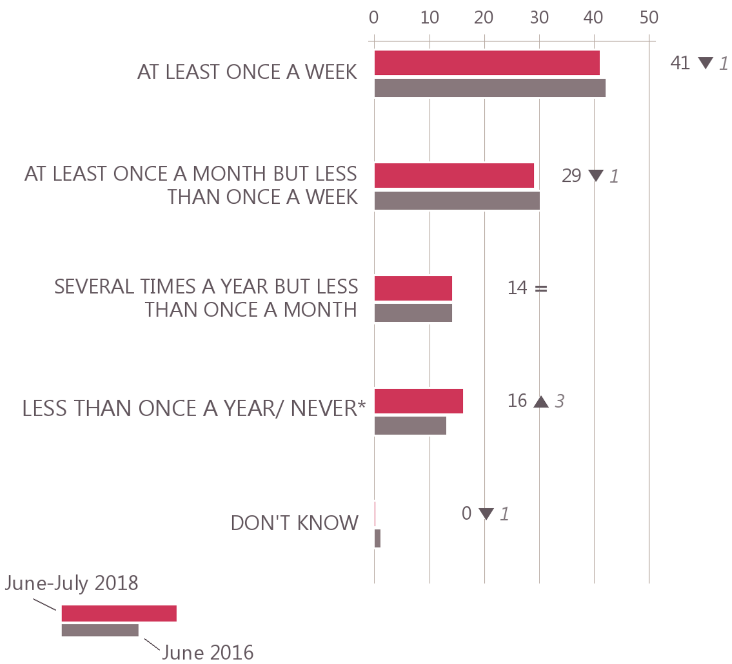
A majority of respondents eat fishery or aquaculture products at home at least once a month

Respondents were first asked how frequently they eat fishery or aquaculture products at home[4].

Seven in ten respondents (70%) eat fishery or aquaculture products at home *'at least once a month*', with around four in ten (41%) eating these products at home '*at least once a week*' and three in ten (29%) eating them '*at least once a month*', but less than once a week.

Slightly more than one in ten respondents (14%) say they eat fishery or aquaculture products at home '*several times a year, but less frequently than once a month*', and a similar proportion (16%) say they do so *'less than once a year* or *never'*

QB1.1 How frequently do you...
Eat fishery or aquaculture products at home (% - EU)



Base: All respondents (N=27,734)

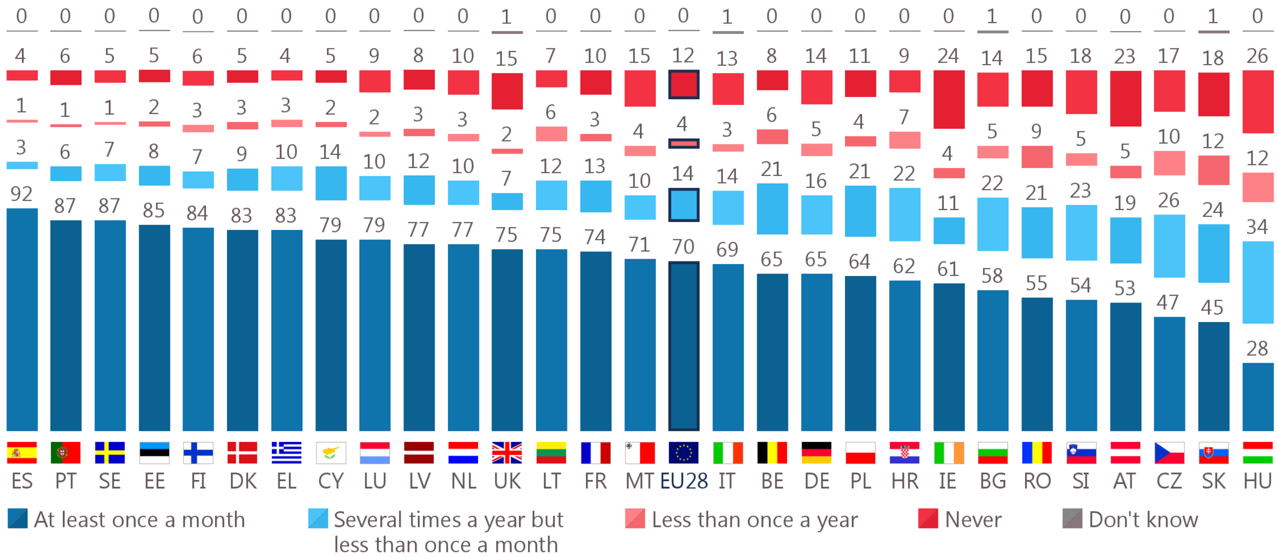
[4] QC1.1. How frequently do you ... Eat fishery or aquaculture products at home? At least once a week; At least once a month but less than once a week; Several times a year but less than once a month; Less than once a year; Never; Don't know.

There are significant differences at *country level*, but these relate primarily to whether respondents **eat fishery or aquaculture products at home** at least once a month or not.

In 25 of the 28 Member States, a majority of respondents eat fishery or aquaculture products at home '*at least once a month*', but this varies from around nine in ten respondents in Spain (92%), Portugal and Sweden (both 87%) to just over half in Romania (55%), Slovenia (54%) and Austria (53%). On the other side of the scale, in Czechia (47%) and Slovakia (45%) just under half of respondents eat these products at home at least once a month, while Hungary stands out for the particularly low proportion of respondents who do so: just over a quarter (28%) of respondents.

QB1.1 How frequently do you…

Eat fishery or aquaculture products at home (%)



Base: All respondents (N=27,734)

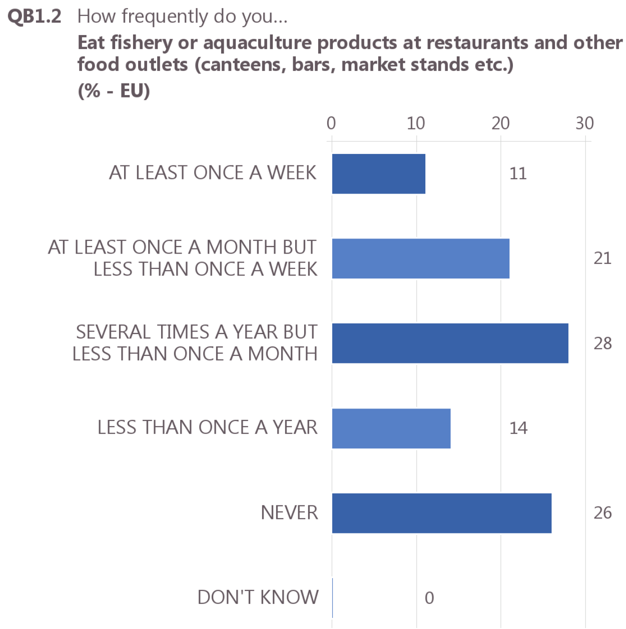
Nearly a third of respondents eat fishery or aquaculture products at restaurants and other food outlets at least once a month

Respondents were also asked about their consumption of fishery or aquaculture products at restaurants and other food outlets (canteens, bars, market stands, etc.)[5].

Just under one third of respondents (32%) say they eat fishery or aquaculture products at restaurants and other food outlets at least once a month: around one in ten (11%) say they do so '*at least once a week*' and around a fifth (21%) '*at least once a month, but less frequently than once a week*'.

Over a quarter of respondents (28%) say they eat FAPs in restaurants, canteens, etc. '*several times a year but less than once a month'*, and 14% say do so *'less than once a year'*.

Finally, over a quarter of respondents (26%) say they '*never*' eat fishery or aquaculture products at restaurants and other food outlets.



Base: All respondents (N=27,734)

Since the previous survey, there have been no large changes in the proportion of those who eat fishery or aquaculture products at restaurants and other food outlets at least once a week, or at least once a month but less than once a week (-2 pp). However, the proportion of respondents who eat these products out-of-home several times a year but less than once a month has declined by six percentage points, while the proportion of those who never eat such products out-of-home has increased by nine percentage points[6].

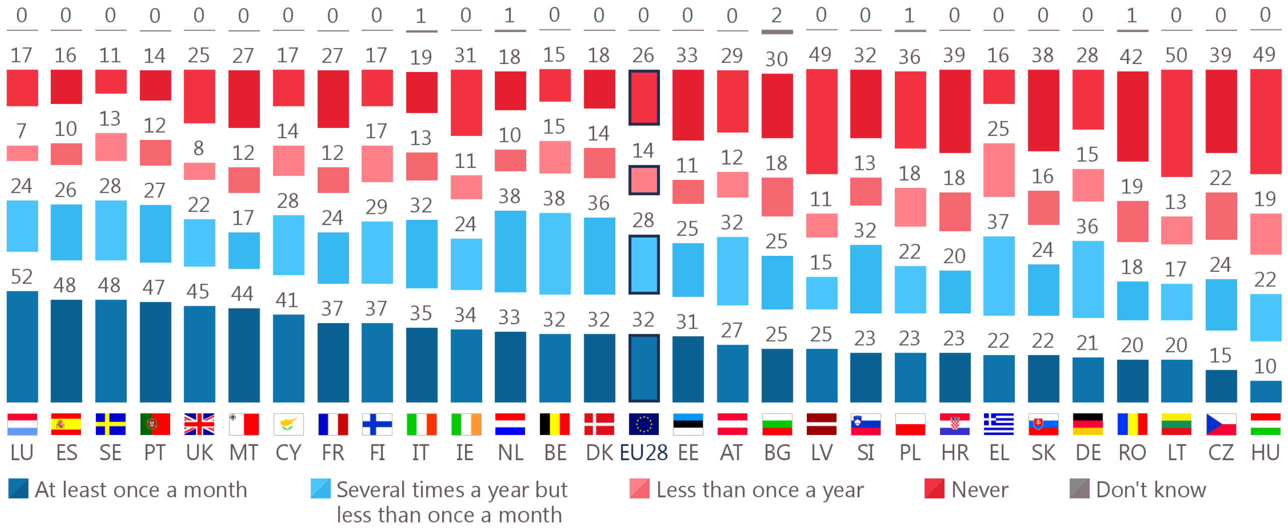
[5] QB1.2. How frequently do you … Eat fishery or aquaculture products at restaurants and other food outlets (canteens, bars, market stands etc)? At least once a week; At least once a month but less than once a week; Several times a year but less than once a month; Less than once a year; Never; Don't know.

[6] In the current survey, respondents were asked whether they ate or bought these products 'Less than once a year'. In the previous survey, this response choice was not available.

At *country level,* in 20 out of 28 Member States at least half of respondents **eat fishery and aquaculture products in restaurants or other food outlets** '*at least once a month*' or '*several times a year but less than once a month*'.

Comparing with the previous survey, in most countries there are only minor changes in the proportion of respondents who say they eat fishery or aquaculture products. The exceptions are Ireland (-10 pp), Belgium (-13 pp), Slovenia (-7 pp), Malta and Lithuania (-5 pp) which have seen a drop in this proportion, while Portugal (+9 pp) and Greece (+5 pp) have seen an increase.

QB1.2 How frequently do you...
Eat fishery or aquaculture products at restaurants and other food outlets (canteens, bars, market stands etc.) (%)



Base: All respondents (N=27,734)

The map below combines the results from the previous two questions to show the percentage of respondents who eat fishery or aquaculture products at least once a month either at home, at restaurants or other food outlets, or in both places.

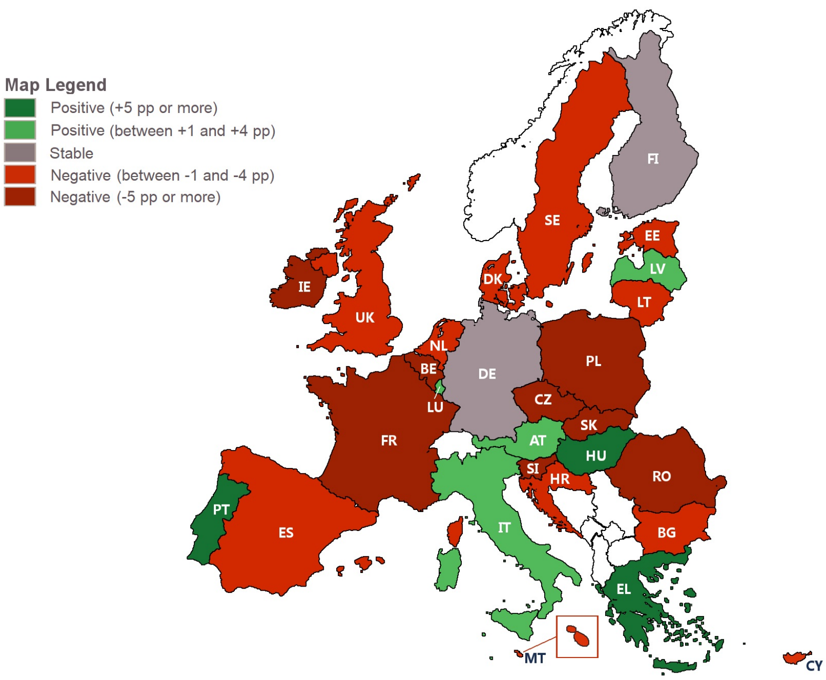
In most countries, a majority of respondents say they **eat fishery or aquaculture products** *'at least once a month'*. Respondents in Spain (92%), Sweden (89%) and Portugal (87%) are the most likely to say this. Respondents in other northern EU countries surrounded by seawater, such as Estonia (86%), Denmark (85%) and Finland (85%) also consume these products frequently, but respondents in land-locked countries such as Czechia (49%) and Slovakia (47%) are significantly less likely to eat fishery and aquaculture products at least once a month.

The lowest proportion is registered in Hungary, where less than a third of respondents (31%) say they eat fishery or aquaculture products at least once a month.

QB1T How frequently do you...

(% - EAT FISHERY OR AQUACULTURE PRODUCTS AT LEAST ONCE A MONTH)

PT	87	▲ 13
EL	84	▲ 6
HU	31	▲ 5
LU	82	▲ 4
IT	72	▲ 4
AT	59	▲ 2
LV	78	▲ 1
FI	85	=
DE	67	=
ES	92	▼ 1
MT	73	▼ 1
EE	86	▼ 1
BG	61	▼ 1
EU28	72	▼ 2
DK	85	▼ 2
UK	77	▼ 2
SE	89	▼ 3
CY	80	▼ 3
LT	76	▼ 4
NL	78	▼ 4
HR	64	▼ 4
FR	76	▼ 5
SK	47	▼ 5
PL	66	▼ 5
RO	58	▼ 6
CZ	49	▼ 7
BE	70	▼ 8
IE	63	▼ 8
SI	56	▼ 13



Base: All respondents (N=27,734)

2 Frequency of buying fishery and aquaculture products

A majority of respondents buy fishery or aquaculture products at least once a month

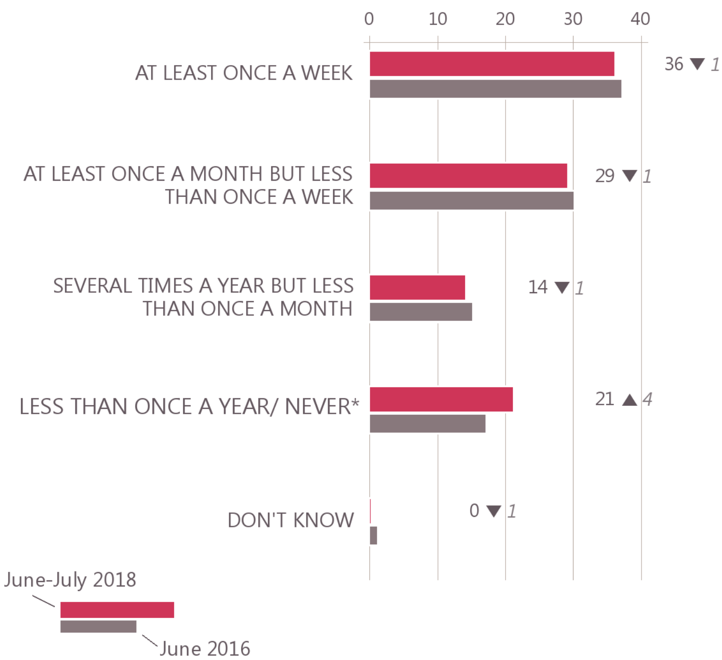
Respondents were also asked how often they buy fishery or aquaculture products[7].

Around two thirds of EU citizens (65%) say they buy fishery or aquaculture products at least once a month, with 36% of respondents buying them '*at least once a week*', 29% '*at least once a month but less than once a week*', and 14% '*several times a year*'.

More than one in ten respondents (16%) say they '*never*' buy these products.

There is very little change in opinion since the last survey. The proportion of respondents who never buy fishery or aquaculture products or do so less than once a year has risen by four percentage points. Part of this increase may be due to the fact that the question was made more precise by adding the option '*less than once a year*' in this wave of the survey.

QB1.3 How frequently do you...
Buy fishery or aquaculture products (% - EU)

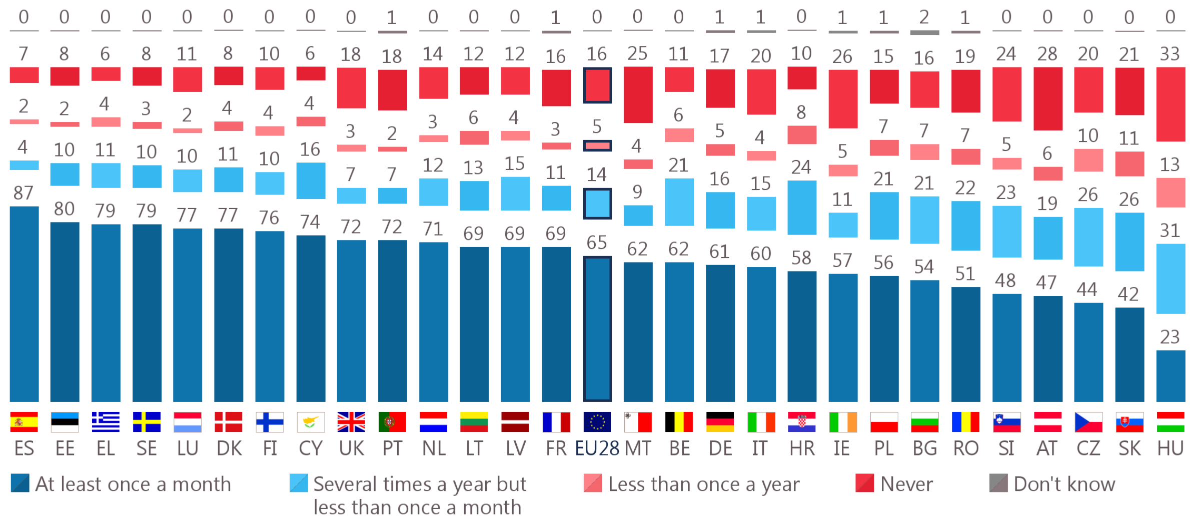


Base: All respondents (N=27,734)

[7] QB1.3. How frequently do you ... Buy fishery or aquaculture products, At least once a week; At least once a month but less than once a week; Several times a year but less than once a month; Less than once a year; Never; Don't know.

Analysis at the *country level* shows that in 23 out of 28 Member States the absolute majority of respondents **buy fishery or aquaculture products** at least once a month, while a relative majority of respondents do so in all the remaining countries, except in Hungary.

QB1.3 How frequently do you...
Buy fishery or aquaculture products (%)



	ES	EE	EL	SE	LU	DK	FI	CY	UK	PT	NL	LT	LV	FR	EU28	MT	BE	DE	IT	HR	IE	PL	BG	RO	SI	AT	CZ	SK	HU
Don't know	0	0	0	0	0	0	0	0	0	1	0	0	0	1	0	0	0	1	1	0	1	1	2	1	0	0	0	0	0
Never	7	8	6	8	11	8	10	6	18	18	14	12	12	16	16	25	11	17	20	10	26	15	16	19	24	28	20	21	33
Less than once a year	2	2	4	3	2	4	4	4	3	2	3	6	4	3	5	4	6	5	4	8	5	7	7	7	5	6	10	11	13
Several times a year but less than once a month	4	10	11	10	10	11	10	16	7	7	12	13	15	11	14	9	21	16	15	24	11	21	21	22	23	19	26	26	31
At least once a month	87	80	79	79	77	77	76	74	72	72	71	69	69	69	65	62	62	61	60	58	57	56	54	51	48	47	44	42	23

Base: All respondents (N=27,734)

In 20 of the 28 Member States, the proportion of respondents who buy fishery or aquaculture products '*at least once a month*' has not changed by more than five percentage points since 2016. The most significant decreases are observed in Slovenia (-15 pp), Belgium and Sweden (both -9 pp), while the only significant increase occurred in Portugal (+10 pp).

3 Where people buy fishery and aquaculture products

Over three quarters of consumers of fishery and aquaculture products buy them at the grocery store or supermarket

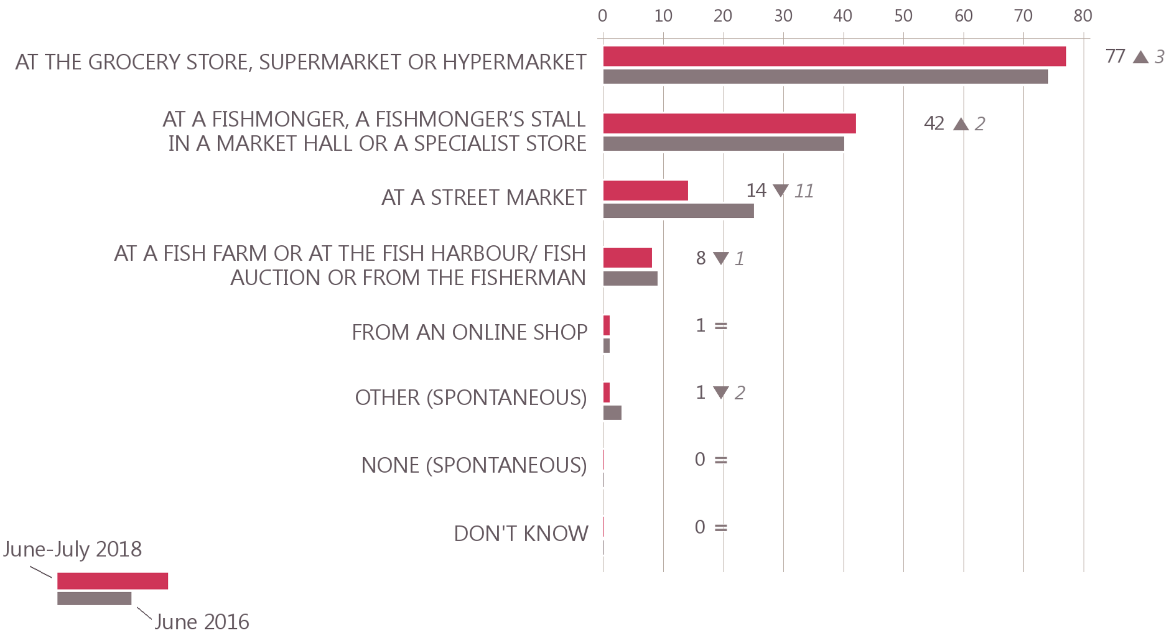
Respondents who said they buy fishery and aquaculture products were asked where they buy these products[8].

Over three quarters of these respondents (77%) buy fishery or aquaculture products at the **grocery store, supermarket or hypermarket**.

Just over four in ten (42%) buy from the **fishmonger or specialist shop**, while just over one in ten (14%) buy fishery and aquaculture products at **the street market**.

Fewer than one in ten (8%) buy these products at a **fish farm or directly from the fisherman** and a very small proportion buy from an **online shop** or through **other** (both 1%) selling channels

QB3 Where do you buy your fishery or aquaculture products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: Respondents who buy FAPs (N=21,865)

[8] QB3. Where do you buy your fishery or aquaculture products? At a street market; at a fishmonger, a fishmonger's stall in a market hall or a specialist store; at the grocery store, supermarket or hypermarket; at a fish farm or at the fish harbour/fish auction or from a fisherman; from an online shop; Other; None; Don't know.

In all but three of the 28 Member States, the most mentioned place of purchase is at the **grocery store, supermarket or hypermarket**. In three cases, respondents who buy FAPs are most likely to buy these products at **a fishmonger, a fishmonger's stall in a market hall, or at a specialist store**: Italy (64%), Greece (65%) and Malta (74%). In all but two countries, less than a quarter of respondents who purchase FAPs say that they buy these products **at street markets**. The exceptions are the Netherlands, where just under four in ten (38%) give this response, and Greece, where over half (55%) do. In all but four Member States, less than a fifth (20%) mentioned they buy FAPs **from a fish farm, from the fisherman or at a fish harbour / auction**. The exceptions are Cyprus, Greece (both 31%), Austria (22%) and Slovenia (21%). The lowest proportion of respondents buy these products from an **online shop**, and in all but one case (Denmark: 6%), less than 5% of those polled give this answer.

QB3 Where do you buy your fishery or aquaculture products?
(MULTIPLE ANSWERS POSSIBLE)
(%)

	At the grocery store, supermarket or hypermarket	At a fishmonger, a fishmonger's stall in a market hall or a specialist store	At a street market	At a fish farm or at the fish harbour/ fish auction or from the fisherman	From an online shop	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	77	42	14	8	1	1	0	0
BE	83	34	21	6	3	0	0	0
BG	72	58	23	16	0	1	0	0
CZ	89	30	3	9	3	2	0	0
DK	78	51	9	12	6	2	0	0
DE	85	36	13	11	0	1	0	0
EE	91	41	12	11	1	2	0	0
IE	80	35	12	6	1	0	0	0
EL	52	65	55	31	1	1	0	0
ES	68	63	7	2	1	2	0	0
FR	82	37	17	7	0	1	0	0
HR	69	58	14	15	1	1	0	0
IT	60	64	18	6	1	0	0	0
CY	69	38	4	31	0	3	0	1
LV	78	52	13	10	1	1	0	0
LT	91	43	6	10	0	3	0	0
LU	84	29	6	4	1	2	1	0
HU	80	43	8	13	1	2	0	0
MT	46	74	20	9	1	1	0	0
NL	74	54	38	4	2	1	0	0
AT	86	33	13	22	3	2	0	0
PL	75	38	8	13	1	1	0	0
PT	84	48	9	2	0	4	0	0
RO	76	36	15	17	1	0	1	0
SI	76	38	8	21	0	2	0	0
SK	93	15	3	15	4	1	0	0
FI	97	20	12	6	1	3	0	0
SE	91	32	2	6	3	2	0	0
UK	85	19	7	3	2	3	0	0

Highest percentage per country *Lowest percentage per country*
Highest percentage per item | Lowest percentage per item

Base: Respondents who buy FAPs (N=21,865)

4 What type of products people buy

A majority buy frozen, fresh or tinned products often or from time to time

Respondent were asked which type of products they like to buy and their frequency of purchase[9].

Just over two thirds (68%) of respondents who buy FAPs say they buy **frozen products** at least from time to time, with 43% saying they buy these products '*from time to time*' and a quarter (25%) saying they buy them '*often*'. Just over a fifth (21%) say they '*rarely*' buy frozen products. Just over one in ten (11%) say they '*never*' buy frozen products.

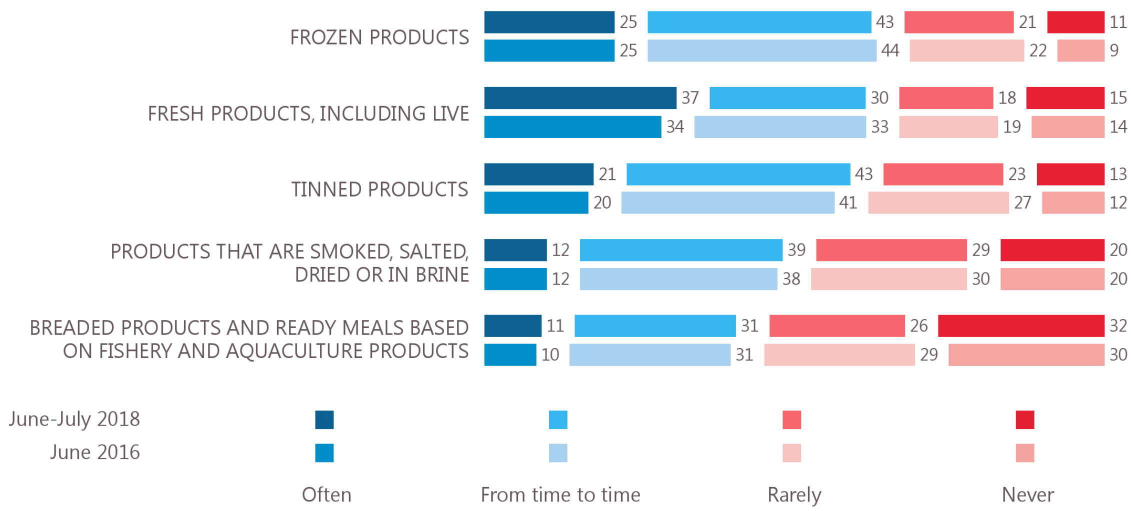
Just over two thirds of respondents who buy FAPs (67%) say they buy **fresh products, including live** '*at least from time to time*', with 37% saying they buy these products '*often*' and 30% saying they buy them '*from time to time*'. Overall, around a third of respondents say they '*rarely*' (18%) or '*never*' (15%) buy fresh products.

Tinned products are bought '*often*' or '*from time to time*' by 64% of respondents who buy FAPs. Just over a fifth (21%) say they '*often*' buy tinned products, while over four in ten (43%) say they buy them '*from time to time*'. Nearly a quarter of respondents say they '*rarely*' buy tinned products (23%) and a further 13% say they '*never*' buy these products.

Just over half of respondents (51%) say they buy products that are **smoked, salted, dried or in brine** '*often*' or '*from time to time*', although they are more likely to say they buy these products '*from time to time*' (39%) than '*often*' (12%). Nearly three in ten respondents (29%) say they '*rarely*' buy products that are smoked, salted, dried or in brine and a fifth (20%) say they '*never*' buy these products.

Finally, nearly six in ten respondents who buy FAPs (58%) have *never* or *rarely* bought **breaded products and ready meals** based on FAPs, compared with 31% who have bought them *from time to time* and 11% of respondents who buy them *often*.

QB4a How frequently would you say you buy each of the following types of fishery and aquaculture products?
(% - EU)

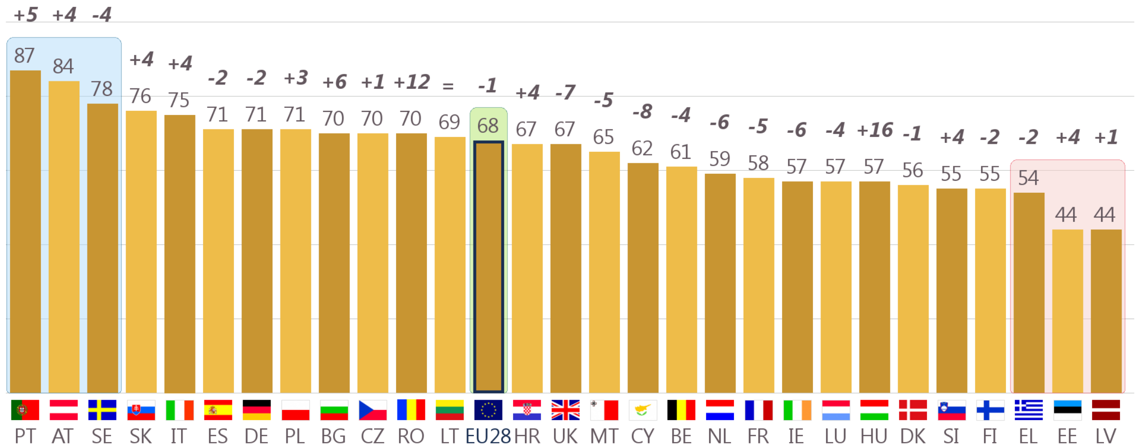


Base: Respondents who buy FAPs (N=21,865)

[9] QC4a. How frequently would you say you buy each of the following types of fishery and aquaculture products? Fresh products, including live; Frozen products; Products that are smoked, salted, dried or in brine; Tinned products; Breaded products and ready meals based on fishery and aquaculture products. Often; From time to time; Rarely; Never; Don't know.

At the *country level*, in 26 Member States a majority of respondents who buy fishery or aquaculture products say that they buy **frozen products** *'at least from time to time'*, with over eight in ten saying this in Portugal (87%) and in Austria (84%). In contrast, just over half of these respondents in Greece (54%), Finland and Slovenia (both 55%) say the same.

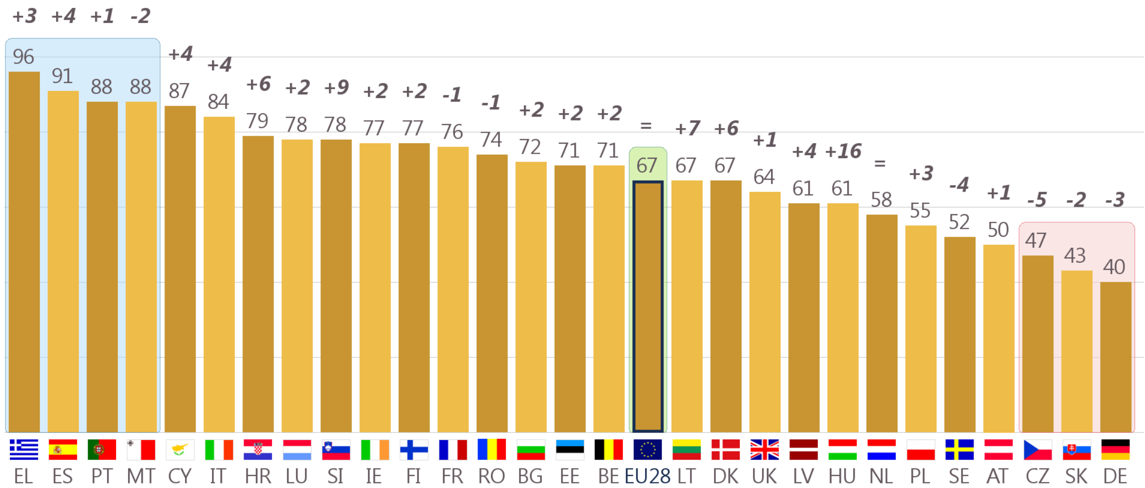
QB4a.2 How frequently would you say you buy each of the following types of fishery and aquaculture products?
Frozen products
(% - AT LEAST 'FROM TIME TO TIME')



Base: Respondents who buy FAPs (N=21,865)

In 25 Member States, at least half of the respondents who buy FAPs say that they buy **fresh products, including live products**, *'at least from time to time'*, but there is significant variation, ranging from 96% of respondents in Greece and 91% in Spain to 50% in Austria.

QB4a.1 How frequently would you say you buy each of the following types of fishery and aquaculture products?
Fresh products, including live
(% - AT LEAST 'FROM TIME TO TIME')



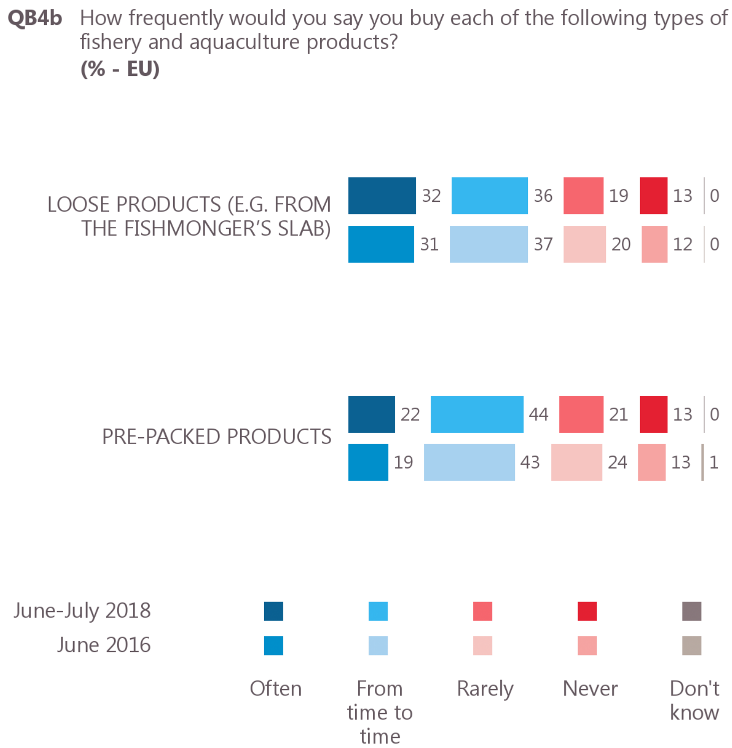
Base: Respondents who buy FAPs (N=21,865)

At least six in ten respondents who buy fresh, frozen, smoked, salted, dried or brined products buy loose and pre-packed products

Respondents who buy fresh, frozen, smoked, salted, dried or brined products were also asked how frequently they buy loose products (e.g. from the fishmonger's slab) and pre-packed products[10].

More than two thirds of these respondents (68%) buy **loose products** at least from time to time, with 36% buying them '*from time to time*' and 32% buying them '*often*'. Almost a third of respondents 'rarely or never' buy loose products (32%).

With regard to **pre-packed products**, two thirds (66%) of respondents buy them often or from time to time, with more respondents saying they buy them '*from time to time*' (44%) than '*often*' (22%). More than a third of respondents '*rarely* or *never*' buy pre-packed products (34%).



Base: Respondents who buy fresh or frozen fish or products that are smoked, salted, dried or in brine (N=21,683)

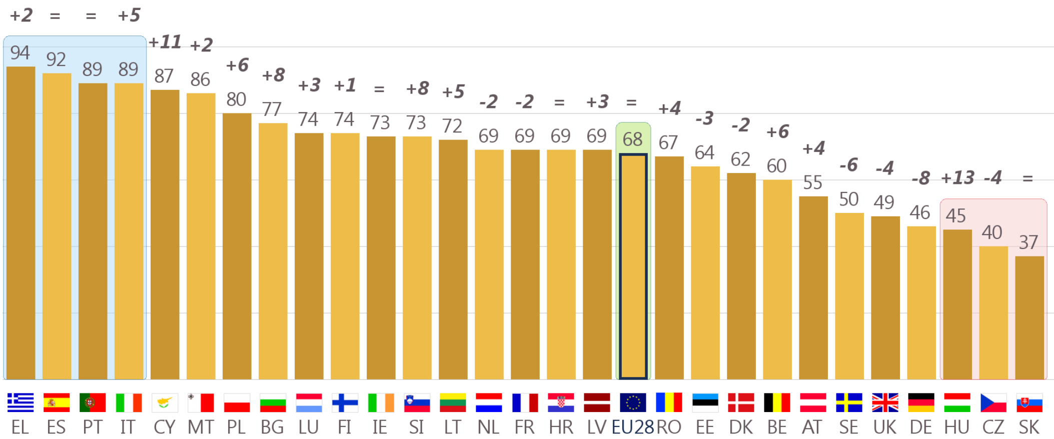
There has been no change since the June 2016 survey in the frequency with which respondents buy loose products, and very little change in the case of pre-packed products, where the largest change is a three percentage point increase in the proportion who buy these products '*often*'.

[10] QB4b. How frequently would you say you buy each of the following types of fishery and aquaculture products? Loose products (e.g. from the fishmonger's slab); Pre-packed products. Often; From time to time; Rarely; Never; Don't know.

Analysis at a *country level* shows that in 23 out of 28 Member States at least half of respondents buy **loose products** '*at least from time to time*'. More than nine in ten respondents in Greece (94%) and Spain (92%) say this, as do 89% of respondents in Portugal and Italy. This compares with almost half of these respondents in the United Kingdom (49%), 50% in Sweden and 55% in Austria.

Compared to the last survey, two countries have seen large changes in the proportions of respondents who buy loose products at least from time to time: Hungary (+13 pp) and Cyprus (+11 pp).

QB4b.1 How frequently would you say you buy each of the following types of fishery and aquaculture products?
Loose products (e.g. from the fishmonger's slab)
(% - AT LEAST 'FROM TIME TO TIME')

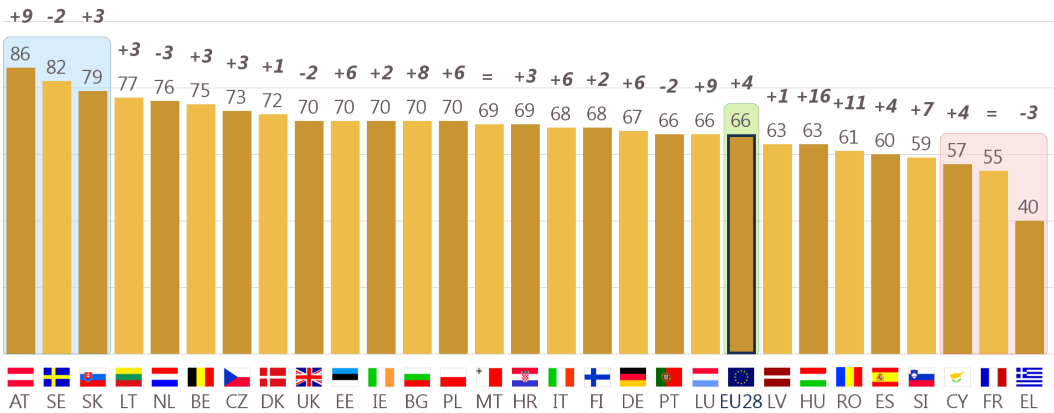


Base: Respondents who buy fresh or frozen fish or products that are smoked, salted, dried or in brine (N=21,683)

In all but one country a majority of respondents buy **pre-packed products** at least '*from time to time*'. The exception is Greece, where only four in ten respondents do this.

In Hungary (+16 pp) and Romania (+11 pp) the proportion of respondents who buy pre-packed products at least '*from time to time*' has increased substantially since the previous survey, and significant increases also occurred in Luxembourg and Austria (both +9 pp).

QB4b.2 How frequently would you say you buy each of the following types of fishery and aquaculture products?
Pre-packed products
(% - AT LEAST 'FROM TIME TO TIME')



Base: Respondents who buy fresh or frozen fish or products that are smoked, salted, dried or in brine (N=21,683)

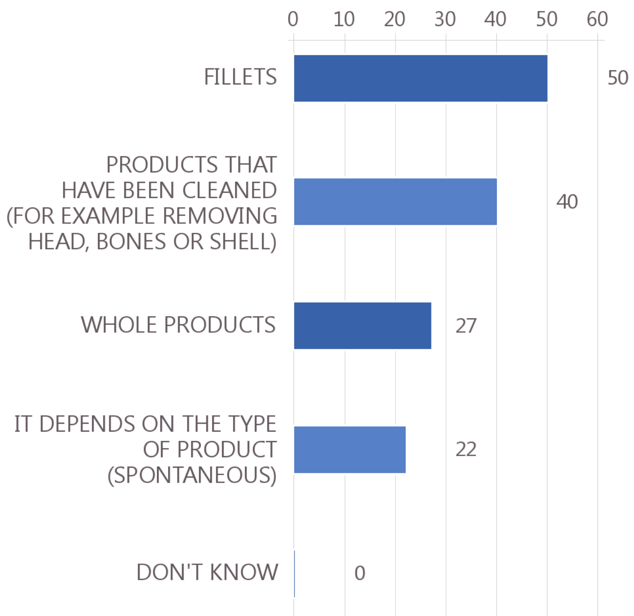
5 Preferences regarding products type

Half of the respondents who buy fresh or frozen product prefer filleted products, while just over a quarter prefer whole products

It was explained to respondents who buy or eat fishery and aquaculture products that there are a range of different types of such products, depending on whether or how they are processed. Respondents were asked to indicate their preferences[11].

Half of these respondents say they prefer **filleted products**, while four in ten (40%) prefer **products that have been cleaned**. Just over a quarter (27%) say they prefer to buy **whole products**, while just over a fifth (22%) say their preference **depends on the type of product**.

QB5 Which of the following products do you prefer?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: Respondents who buy fresh or frozen products (N=21,453)

[11] QB5. Which of the following products do you prefer? Whole products; Products that have been cleaned (for example removing head, bones or shell); Whole products; It depends on the type of product (SPONTANEOUS); Don't know.

In 18 of the 28 Member States, the most mentioned answer is **'fillets'**. In 13 countries, this answer is given by a majority of the respondents who buy fresh or frozen products, with the highest proportion in Poland (68%), followed by Ireland and Slovakia (both 63%). At the other end of the scale, only a third (33%) of respondents in Cyprus, Greece and Spain prefer fillets. In Portugal this is the least popular response, with only just over a quarter (27%) having this preference.

In six countries – Bulgaria, Spain, Italy, Malta, the Netherlands and Portugal – the answer most often mentioned is **'products that have been cleaned'**. In the Netherlands, over half (55%) of respondents give this answer. In all other countries only a minority give this answer, but this ranges from nearly half of those polled in Spain (49%) and Italy (48%) to less than three in ten of those polled in Latvia (28%) and Cyprus (29%).

In four countries – Greece, Romania, Croatia and Cyprus – **'whole products'** is the most popular response. Greece and Romania (both 68%) stand out, with over two thirds of respondents mentioning they prefer these products. In 22 countries, this is the least frequently mentioned of the options named in the survey.

In all countries, only a minority answer that **'it depends on the type of product'**, but this varies from over a third in Estonia (38%), Czechia (36%) and Latvia (35%) to less than one in ten (7%) respondents in the United Kingdom.

QB5 Which of the following products do you prefer?
(MULTIPLE ANSWERS POSSIBLE)
(%)

	Fillets	Products that have been cleaned (for example removing head, bones or shell)	Whole products	It depends on the type of product (SPONTANEOUS)	Don't know
EU28	50	40	27	22	0
BE	**54**	46	*20*	12	0
BG	*34*	**46**	39	31	1
CZ	**57**	35	*19*	36	0
DK	**55**	46	*19*	23	0
DE	**56**	35	*15*	30	0
EE	**49**	38	*27*	38	0
IE	**63**	43	*24*	17	0
EL	*33*	37	**68**	19	0
ES	33	**49**	*31*	26	0
FR	**54**	33	*30*	15	1
HR	44	*40*	**53**	10	0
IT	43	**48**	*37*	30	0
CY	33	*29*	**42**	34	0
LV	**36**	*28*	*28*	35	0
LT	**48**	46	*33*	19	1
LU	**48**	40	*20*	33	0
HU	**56**	41	*28*	20	0
MT	43	**45**	*34*	19	1
NL	48	**55**	*11*	25	0
AT	**62**	40	*24*	26	0
PL	**68**	36	*21*	17	0
PT	*27*	**38**	35	34	0
RO	34	*31*	**68**	16	0
SI	**46**	43	*33*	22	0
SK	**63**	34	*24*	26	1
FI	**61**	35	*21*	18	0
SE	**61**	35	*12*	27	1
UK	**59**	38	*13*	7	2

Highest percentage per country *Lowest percentage per country*

Highest percentage per item | Lowest percentage per item

Base: Respondents who buy fresh or frozen products (N=21,453)

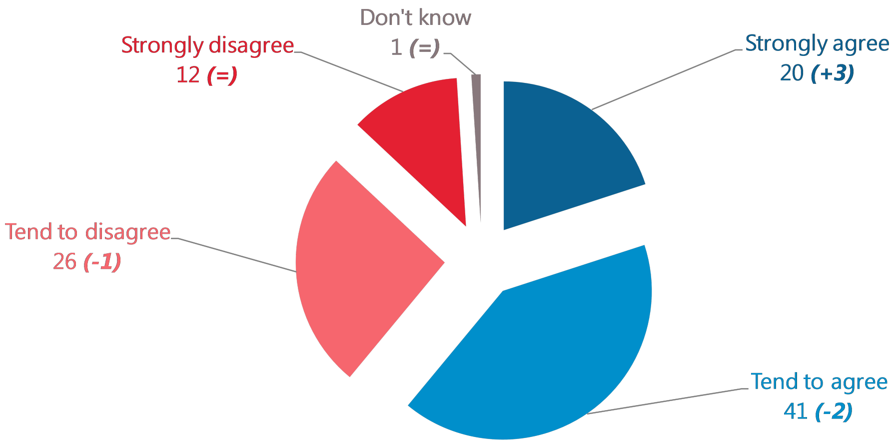
6 Trying new fishery and aquaculture products: attractiveness and occasions

A majority of respondents who consume fishery and aquaculture products like to try new products and species

Respondents who said they buy or eat FAPs were asked whether they like to try new products and species and when they prefer trying them[12].

Just over six in ten (61%) of the respondents who buy or eat FAPs agree they like to **try new products and species**, with 41% saying they '*tend to agree*' and 20% saying they '*strongly agree*'. Slightly more than a quarter '*tend to disagree*' (26%), while 12% '*strongly disagree*', bringing the share of respondents who do not like to try new products to 38%. These figures are almost identical to those observed in the previous survey.

QB17.1 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
You like to try new products and species (% - EU)



(June-July 2018 - June 2016)

Base: Respondents who buy or eat FAPs (N=23,968)

An analysis at *country level* shows that a majority of respondents in almost all of the 28 Member States who buy or eat FAPs **agree** they like to try new products and species, with the highest proportions in Cyprus (76%) and Poland (75%), while the respondents in France (53%), Czechia (51%) and Austria (49%) are more divided.

[12] QB17. Do you agree or disagree with the following statements regarding fishery and aquaculture products? You like to try new products and species; You try new products at home; You try new products in restaurants or on special occasions; You try new products when there is a promotional event, for example at the supermarket. Strongly agree; Tend to agree; Tend to disagree; Strongly disagree; Don't know.

Almost two thirds of the respondents who consume fishery and aquaculture products try new products at home

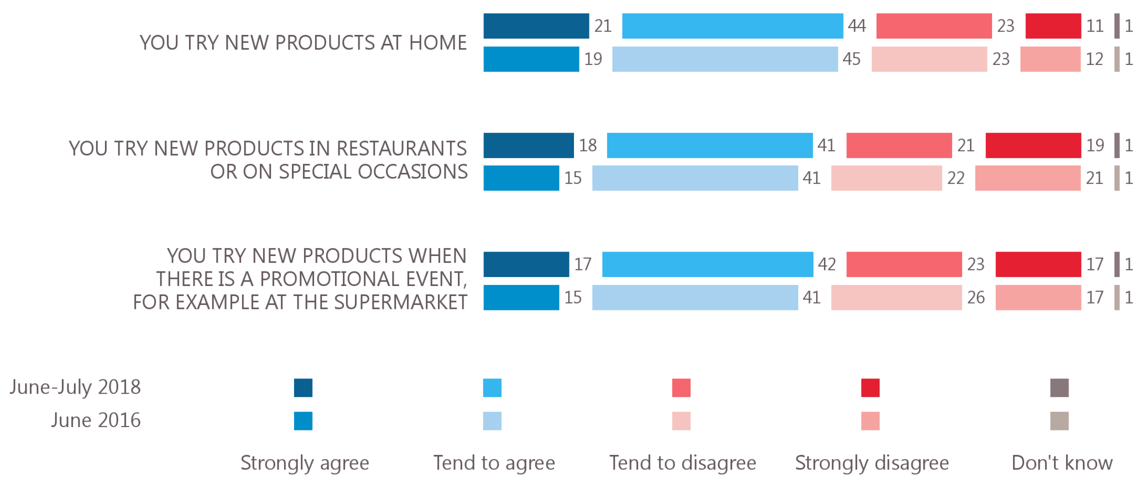
Respondents who buy or eat fishery and aquaculture products were asked where they try new products: at home, when there is a promotional event, or in restaurants or on special occasions.

Nearly two thirds of these respondents (65%) agree they try new products **at home**, with just over a fifth (21%) saying they '*strongly agree*' and 44% of respondents tending to agree.

Just under six in ten (59%) agree they try new products **at restaurants or on special occasions**. 18% 'strongly agree' and 41% '*tend to agree*', while just under a fifth (19%) '*strongly disagree*'.

The same proportion of respondents (59%) agree that they try new products **when there is a promotional event (for example at the supermarket)**, with 17% who '*strongly agree*' and 42% who '*tend to agree*'.

QB17 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

There has been no significant change in responses since the last survey.

In all EU countries, the majority of respondents who buy or eat FAPs agree they try new products at **home**. In 19 Member States, this is the most frequent response.

In 20 EU countries, at least half of these respondents '*agree*' they try **new products in restaurants or on special occasions**. The highest proportions of respondents who agree are found in Italy (76%), Sweden (73%) and Ireland (71%).

In 21 EU countries, at least half of these respondents '*agree*' they **try new products during promotional events**, with respondents in Ireland (77%) the most likely to give this answer, followed by those in the United Kingdom (71%) and Slovakia (70%).

In 17 of the 28 Member States, the proportion of respondents who mention they **try new products at home** has slightly increased since the last survey, with the most significant increases observed in Slovakia (+8 pp) and Poland (+7 pp).

In all but three countries there has been an increase in the proportion of respondents who mention they try **new products in restaurants or on special occasions**. The largest increases have occurred in Slovakia and Poland (both +12 pp).

The proportion of respondents who say they **try new products during promotional events** has increased in 17 countries, in some cases by a substantial amount, such as in Slovakia (+9 pp), Poland (+8 pp) and Finland (+7 pp).

QB17 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
(% - TOTAL 'AGREE')

	You try new products at home	You try new products in restaurants or on special occasions	You try new products when there is a promotional event, for example at the supermarket
EU28	65	59	59
BE	**65**	*63*	64
BG	**66**	*45*	65
CZ	64	*39*	**66**
DK	65	**68**	*46*
DE	**59**	52	*49*
EE	**73**	*50*	*50*
IE	76	*71*	**77**
EL	**65**	*57*	60
ES	**59**	56	*52*
FR	57	**58**	*52*
HR	**78**	38	*34*
IT	69	**76**	*68*
CY	**74**	65	*57*
LV	**71**	*45*	47
LT	**73**	42	*40*
LU	68	**70**	*54*
HU	**59**	*45*	54
MT	**76**	67	*59*
NL	**63**	**63**	*47*
AT	58	*55*	**62**
PL	**76**	*58*	65
PT	**63**	*58*	62
RO	**64**	*47*	56
SI	**60**	46	*35*
SK	65	*50*	**70**
FI	**66**	*57*	**66**
SE	72	**73**	*56*
UK	**75**	*67*	71

Highest percentage per country *Lowest percentage per country*

Highest percentage per item | Lowest percentage per item

Base: Respondents who buy or eat FAPs (N=23,968)

7 Influence of media, family and friends on consumption habits

Respondents prefer suggestions from family or friends when buying or eating fishery or aquaculture products

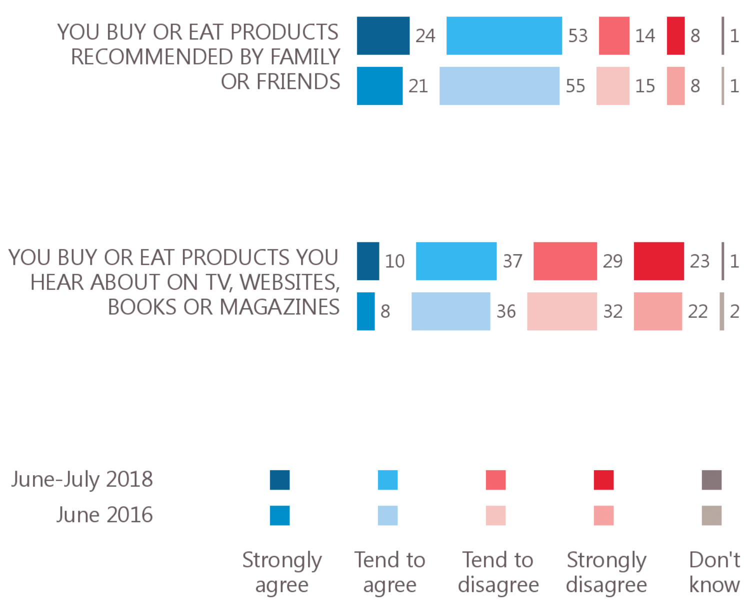
Respondents who buy or eat FAPs were also asked about the factors that influence them when buying or eating products: whether family or friends are the main influencer or whether they rely on what they hear on TV, websites, books or magazines[13].

Over three quarters (77%) of respondents who buy or eat fishery and aquaculture products, agree they buy or eat products **suggested by family or friends**, with nearly a quarter of respondents saying they '*strongly agree*' (24%).

On the other hand, over half (52%) disagree that they like to buy or eat products they hear about on **TV, websites, books or magazines**. More than a fifth '*strongly disagree*' (23%) and a further three in ten (29%) '*tend to disagree*'.

Over a third (37%) of respondents consuming FAPs '*tend to agree*' their consumption habits are influenced by the media, and one in ten (10%) '*strongly agree*'.

QB17 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

[13] QB16. Do you agree or disagree with the following statements regarding fishery and aquaculture products? You buy or eat products suggested by family or friends; You buy or eat products you hear about on TV, websites, books or magazines. Strongly agree; Tend to agree; Tend to disagree; Strongly disagree; Don't know.

In 27 of the 28 Member States, more than two thirds of respondents who buy or eat FAPs say **they buy or eat products recommended by family or friends**. The exception is France, where the proportion of those who buy or eat fishery and aquaculture products recommended by family and friends is slightly lower, at 65%. At the other hand of the scale, 89% of respondents in Ireland say so.

In eight Member States, the majority of respondents agree they **buy or eat products they hear about on TV, websites, books or magazines**, ranging from just over half (55%) of respondents in the United Kingdom to over six in ten (63%) in Finland.

The proportion of respondents who say they buy or eat products **recommended by family or friends** has increased slightly since 2016. This is particularly the case in Ireland (+7 pp), Austria (+6 pp), Cyprus and the United Kingdom (+5 pp).

In all but seven countries there has been an increase in the proportion of respondents who say they **buy or eat products they hear about on TV, websites, books or magazines**. The largest increases have occurred in Slovakia (+15 pp), Poland, Bulgaria, Cyprus (all +9 pp) and Slovenia (+8 pp).

QB17 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
(% - TOTAL 'AGREE')

	You buy or eat products recommended by family or friends	June-July 2018 - June 2016	You buy or eat products you hear about on TV, websites, books or magazines	June-July 2018 - June 2016
EU28	77	▲ 1	47	▲ 3
BE	69	▲ 2	48	▲ 4
BG	86	▼ 5	44	▲ 9
CZ	84	▲ 1	47	▲ 6
DK	79	▲ 4	47	▼ 6
DE	72	=	43	▲ 4
EE	81	▲ 1	49	=
IE	89	▲ 7	61	▲ 2
EL	86	▲ 1	48	▲ 2
ES	73	▲ 3	33	▲ 3
FR	65	▼ 1	34	▼ 3
HR	88	▲ 4	49	=
IT	85	▲ 1	57	▲ 4
CY	79	▲ 5	50	▲ 9
LV	79	▲ 1	44	▲ 4
LT	84	▲ 2	45	▲ 5
LU	72	▲ 1	42	▲ 5
HU	81	▲ 3	48	▲ 3
MT	78	▲ 3	56	▲ 2
NL	70	▼ 2	42	▼ 6
AT	81	▲ 6	48	▼ 1
PL	86	▲ 4	60	▲ 9
PT	79	▼ 1	45	▲ 1
RO	79	▲ 2	46	▲ 7
SI	75	▼ 1	47	▲ 8
SK	87	▲ 4	57	▲ 15
FI	79	▲ 3	63	▲ 7
SE	85	=	58	▼ 5
UK	80	▲ 5	55	▼ 3

Base: Respondents who buy or eat FAPs (N=23,968)

8 Influence of price and diversification on consumption habits

More than two thirds of respondents who consume fishery and aquaculture products would buy or eat more if the price was not so high

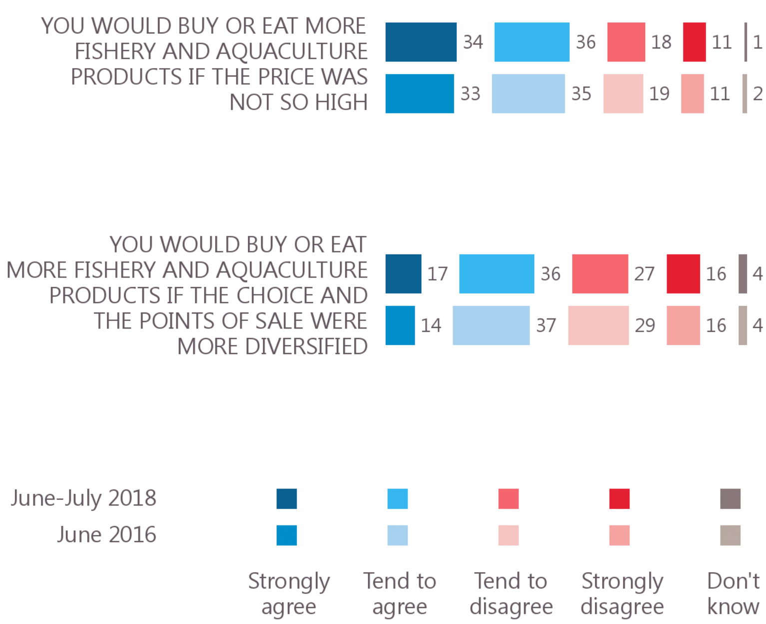
Respondents who buy or eat FAPs were asked about the factors deterring them from buying or eating more fishery and aquaculture products[14].

Seven in ten (70%) agree they would buy or eat more fishery and aquaculture products if the **price was not so high**, with just over one third saying they '*strongly agree*' (34%) and a similar proportion (36%) saying they '*tend to agree*'.

The majority of respondents (53%) say they would buy or eat more products if **the choice and the points of sale were more diversified**. Just under a fifth of those polled '*strongly agree'* (17%), while a relative majority (36%) say they '*tend to agree'*.

Out of the two factors, lower prices are more likely to influence respondents to buy or eat more fishery or aquaculture products

QB17 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
(% - EU)

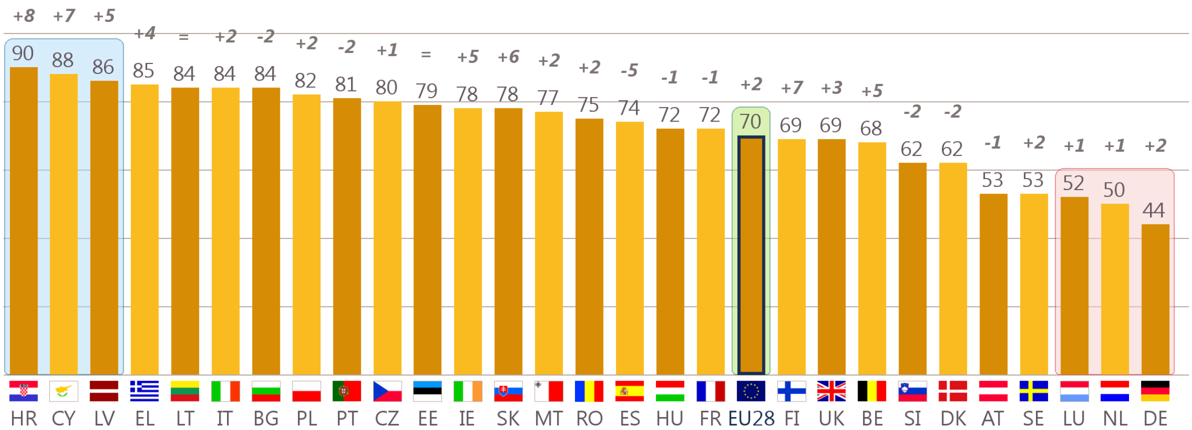


Base: Respondents who buy or eat FAPs (N=23,968)

[14] QB17.7-8. Do you agree or disagree with the following statements regarding fishery and aquaculture products? You would buy or eat more fishery and aquaculture products if the price was not so high; You would buy or eat more fishery and aquaculture products if the choice and the points of sale were more diversified. Strongly agree; Tend to agree; Tend to disagree; Strongly disagree; Don't know.

In all but one country, at least half of the respondents who buy or eat fishery and aquaculture products say **they would buy or eat more fishery and aquaculture products if the prices were not so high**. However, there are substantial differences on this question: just over half of respondents in Luxembourg (52%), Austria and Sweden (both 53%) agree, compared with nine in ten respondents in Croatia (90%) and nearly as many in Cyprus (88%). Germany is the exception, with only 44% of respondents who buy or eat FAPs saying they would buy or eat more if these products were cheaper.

QB17.8 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
You would buy or eat more fishery and aquaculture products if the price was not so high (% - TOTAL 'AGREE')



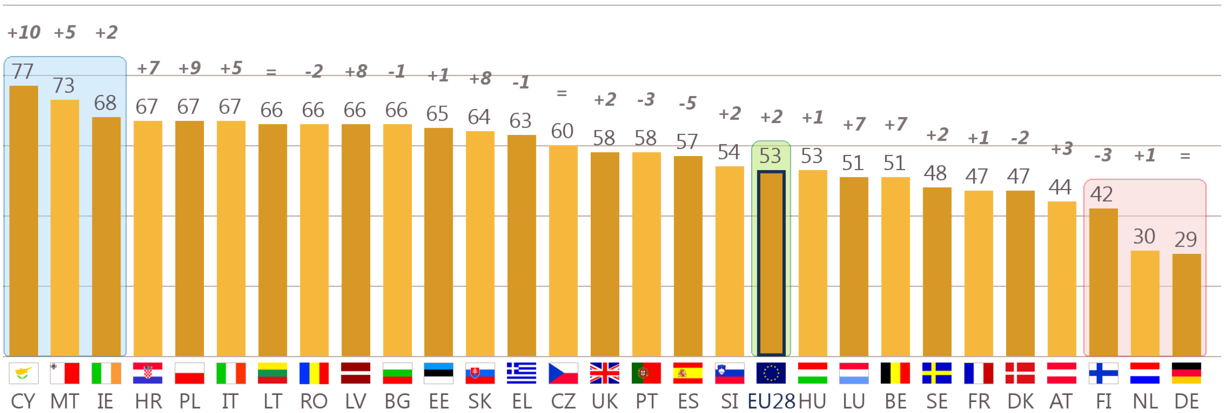
Base: Respondents who buy or eat FAPs (N=23,968)

The proportion of respondents who would buy or eat more fishery and aquaculture products if the price was not so high has increased slightly in all but ten countries compared to June 2016. The largest increase has occurred in Croatia (+8 pp), Cyprus, Finland (+7 pp) and Slovakia (+6 pp).

In most of the 28 Member States, a majority of respondents who eat or buy FAPs agree that **they would buy or eat more fishery and aquaculture products if the choice and the points of sale were more diversified**. Again, there are significant differences across countries in the extent of this majority: over three quarters of respondents in Cyprus (77%) agree with this statement, compared with just over half of the respondents in Hungary (53%).

In most countries there has been little change since 2016, in the proportion of the respondents who would buy or eat more FAPs if the choice and the points of sale were more diversified. The largest increase occurred in Cyprus (+10 pp), Poland (+9 pp), Slovakia and Latvia (+8 pp). No significant decreases are observed.

QB17.7 Do you agree or disagree with the following statements regarding fishery and aquaculture products?
You would buy or eat more fishery and aquaculture products if the choice and the points of sale were more diversified (% - TOTAL 'AGREE')



Base: Respondents who buy or eat FAPs (N=23,968)

II. PREFERENCES REGARDING FISHERY AND AQUACULTURE PRODUCTS

1 Reasons for buying or eating fishery and aquaculture products

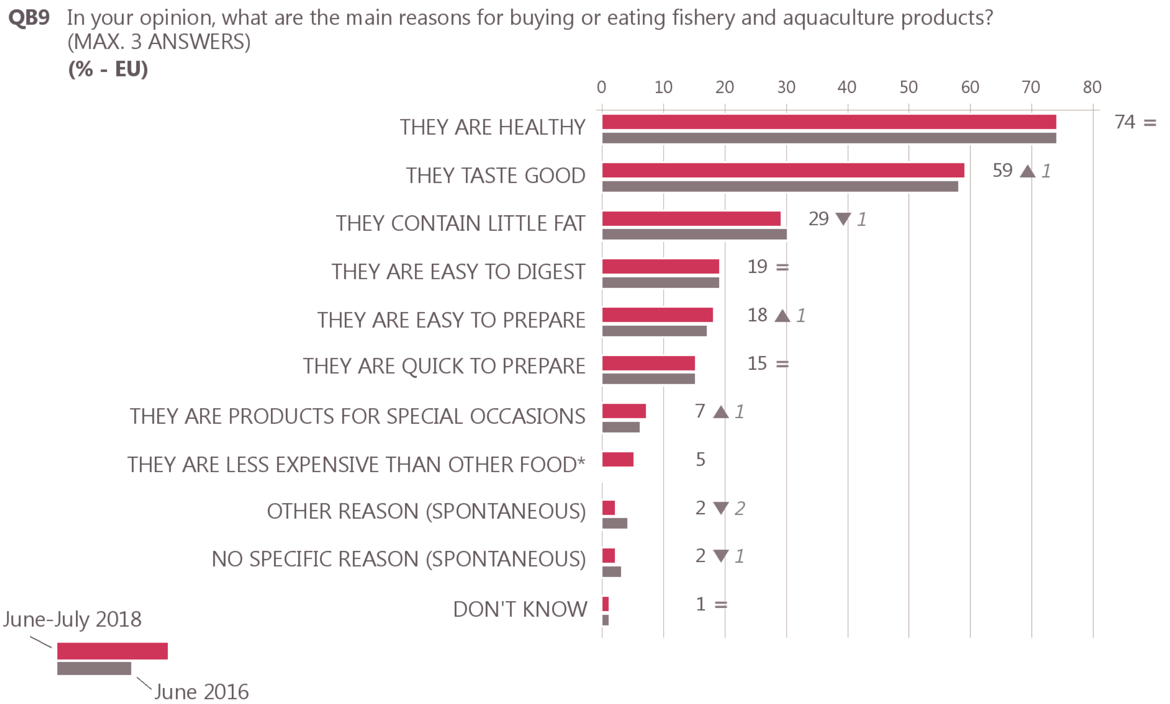
The majority of respondents who buy or eat fishery and aquaculture products do so because they are healthy and taste good

Respondents who buy or eat fishery and aquaculture products were asked their main reasons for buying or eating these products[15].

The most commonly mentioned reasons to buy or eat fishery and aquaculture products are because **they are healthy** (74%) and because **they taste good** (59%).

Just under three in ten respondents say they buy or eat these products because **they contain little fat** (29%), while less than a fifth say that it is because **they are easy to digest** (19%), **they are easy to prepare** (18%) and **they are quick to prepare** (15%).

The least mentioned reasons are because **they are products for special occasions** (7%) or because **they are less expensive than other food** (5%).



Base: Respondents who buy or eat FAPs (N=23,968)

There has been no significant change since 2016, despite the slight change of wording[16].

[15] QB9. In your opinion, what are the main reasons for buying or eating fishery and aquaculture products? (MAX. 3 ANSWERS): They are healthy; They taste good; They are products for special occasions; They contain little fat; They are quick to prepare; They are easy to prepare; They are easy to digest; They are less expensive than other food; Other reason (SPONTANEOUS); No specific reason (SPONTANEOUS); Don't know.

[16] The previous survey contained the option 'They look good on the table', which has been removed in the current survey and replaced with 'They are less expensive than other food'.

At least half of respondents in all countries mention the fact that **they are healthy** as the main reason why they buy or eat fishery and aquaculture products and in all but two of the 28 Member States, this is the most frequently mentioned reason. The exceptions are Estonia and Italy where respondents are equally likely to say that **they taste good**.

At least half of respondents in all but two countries say one of the main reasons they buy or eat fishery and aquaculture products is because **they taste good**. The remaining reasons are mentioned less frequently.

The proportion of respondents who say they buy or eat FAPs because **they are healthy** has remained stable across the wave at an EU level, but has decreased slightly in Malta (-7 pp), Slovakia and, Finland (both -6 pp).

There has been minimal change among those who say they buy or eat FAPs because **they taste good**. The most significant increases have occurred in Malta (+8 pp) and Italy (+6 pp), while the biggest decreases are registered in Sweden, Latvia (both –6 pp) and Denmark (-5 pp).

2 Reasons for not eating fishery and aquaculture products

Amongst those who never eat fishery or aquaculture products, the main reasons are they don't like the taste, smell or appearance of these products.

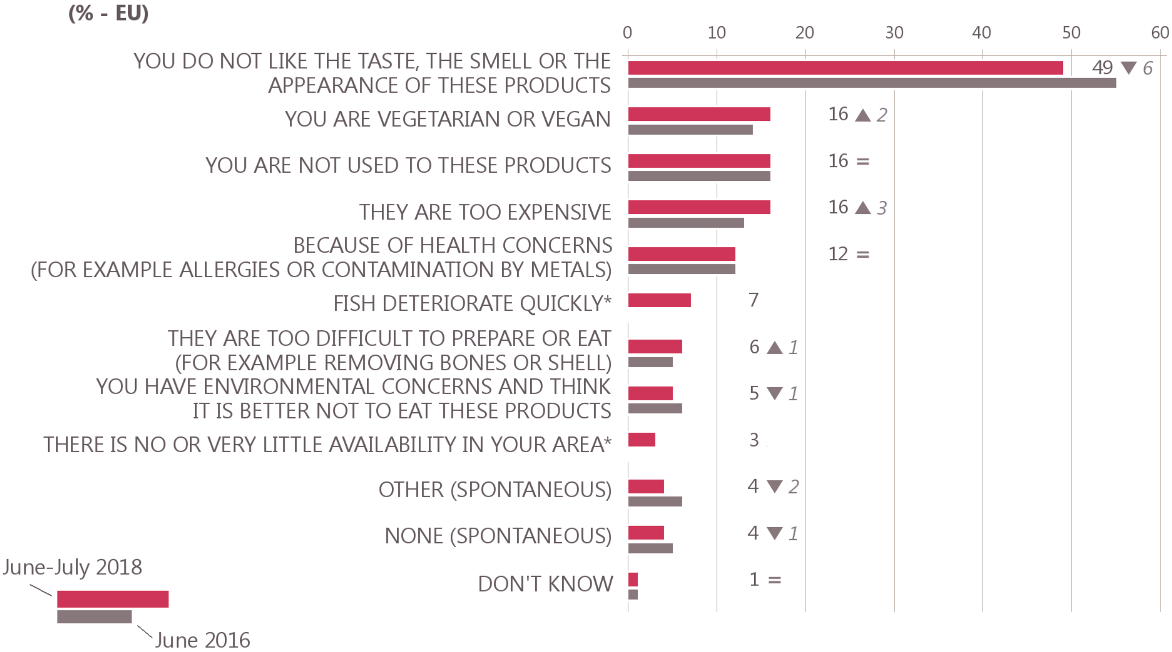
Respondents who never eat fishery or aquaculture products were asked their reasons for not doing so[17].

Nearly half (49%) of these respondents say they do not eat FAPsbecause **they do not like their taste, smell or appearance**. This is by far the most frequently mentioned reason for not eating them.

Less than a fifth (16%) say it is because **they are vegetarian or vegan**, because **they are not used to the products**, or because **they are too expensive**. A further 12% have **health concerns** such as allergies or contamination by metals.

Very small proportions of respondents say they do not eat FAPs because **fish deteriorate quickly** (7%), because they consider these products **too difficult to prepare or eat** (for example removing bones or shells) (6%) because they have **environmental concerns** (5%), or **because there is no or little availability of these products in their area** (3%). Very few respondents mention **other** or **none** of these reasons (both 4%) for not eating FAPs.

QB2 Which of the following are the main reasons why you never or almost never eat fishery or aquaculture products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: Respondents who never or almost never eat FAPs (N=3,859)

[17] QB2. Which of the following are the main reasons why you never eat any fishery or aquaculture products? (MULTIPLE ANSWERS POSSIBLE) You do not like the taste, the smell or the appearance of these products; They are too difficult to prepare or eat (for example removing bones or shell); They are too expensive; Because of health concerns (for example allergies or contamination by metals); You are not used to these products; You have environmental concerns and think it is better not to eat these products; You are vegetarian or vegan; There is no or little availability of these products in your area; Fish deteriorate quickly; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

3 Most important aspects when buying fishery and aquaculture products

The product's appearance and the cost are the most important aspects for respondents when buying FAPs, although product origin is also important

Respondents who buy fishery and aquaculture products were asked to consider a number of aspects and to select which are the most important when buying these products[18].

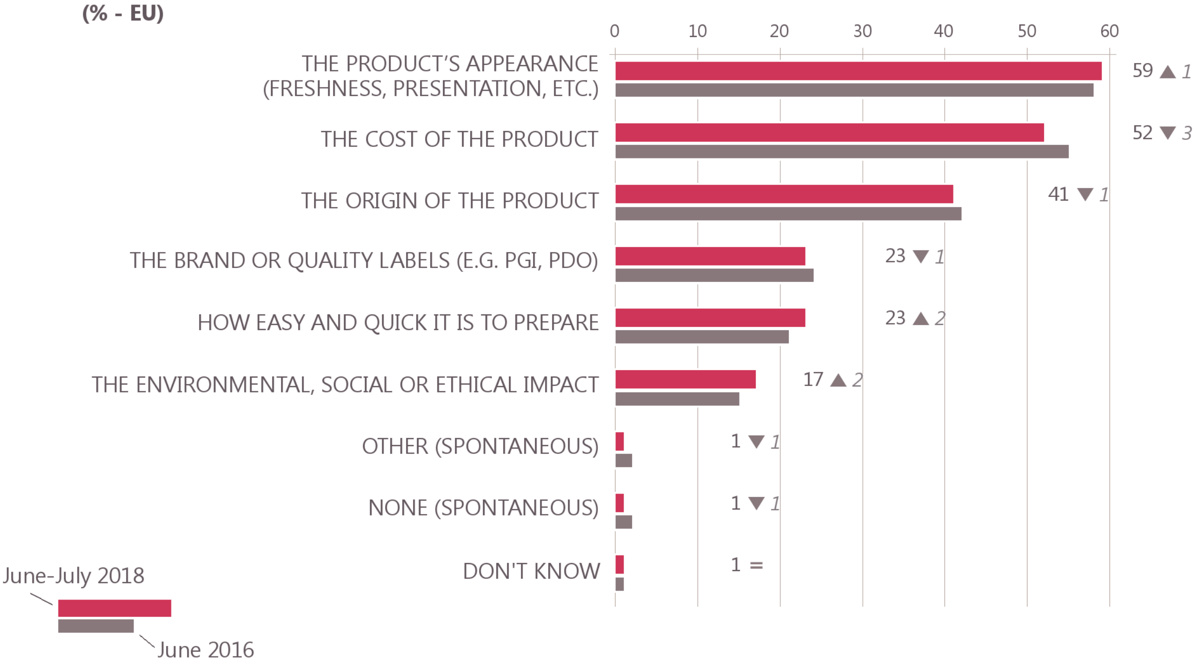
More than half mention the **product's appearance** (59%) and the **cost of the product** (52%) as important aspects when buying fishery and aquaculture products.

The third most frequently mentioned aspect is the **origin of the product**, with more than four in ten respondents (41%) considering this important.

More than a fifth (23%) of respondents consider **the brand or quality labels (e.g. PGI, PDO)** and **how easy and quick it is to prepare** as important.

Finally, the **environmental, social or ethical impact** is least mentioned as important (17%).

QB10 When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)
(% - EU)



Base: Respondents who buy FAPs (N=21,865)

Once again there have been very few changes since the last survey. The gap between "the product's appearance" and "the cost of the product" has increased by four percentage points, suggesting that the product's appearance is increasingly a driver of purchasing behaviour compared to cost.

[18] QB10. When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS) How easy and quick it is to prepare; The origin of the product; The product's appearance (freshness, presentation, etc); The cost of the product; The brand or quality labels (e.g. IGP, DOP); The environmental, social or ethical impact; Other (SPONTANEOUS); None (SPONTANEOUS; Don't Know.

In 22 of the 28 Member States, the most mentioned aspect when buying fishery and aquaculture products is the **product's appearance**. More than eight in ten respondents in Greece (81%) also mention the product's appearance as one of the most important aspects, but almost as many consumers pay attention to the cost of the product (78%).

The **cost of the product** is the most mentioned answer in 5 countries, with the highest proportion of respondents mentioning this in Slovakia (73%). In Belgium, a similar share mention both this aspect (55%) and the product's appearance (53%).

While the **origin of the product** is not the most important aspect in any of the 28 Member States, it is the second most important aspect in seven countries, and the third most important in a further 16.

The brand or quality labels (e.g. PGI, PDO) is the second aspect most mentioned in Sweden (46%), and the proportion who give this reason is also high in Austria (40%). Elsewhere, no more than a third of respondents mention this aspect, with the lowest proportions observed in Cyprus, Slovakia (both 11%) and Estonia (10%). In Germany, a relatively large proportion mention the brand or quality labels (38%), although a similar share in this country also cite the cost of the product (41%).

In 20 countries, at least a fifth of respondents mention **how easy and quick it is to prepare** as an important aspect informing their decision to purchase these products. In three cases, Ireland (39%), Czechia and Finland (both 34%), the proportion of those who mention this aspect exceeds a third of those polled. This aspect is the third most mentioned in Ireland, together with the origin of the product (39%).

In Sweden, both the **environmental, social or ethical impact** (47%) and the brand or quality labels (46%) are the most important aspects for respondents. With this level of importance allocated to the environmental, social or ethical impact of FAPs, Sweden stands far ahead of other countries: although just under a third (32%) of respondents in the Netherlands also value this aspect, in all other countries no more than a quarter mention it, and in 11 countries less than one in ten do so.

QB10 When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)
(%)

	The product's appearance (freshness, presentation, etc.)	The cost of the product	The origin of the product	The brand or quality labels (e.g. PGI, PDO)	How easy and quick it is to prepare	The environmental, social or ethical impact	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	59	52	41	23	23	17	1	1	1
BE	53	55	31	20	26	20	1	0	0
BG	64	68	38	17	18	11	0	1	1
CZ	70	64	28	13	34	3	1	1	0
DK	66	41	31	24	27	19	3	1	2
DE	46	41	43	38	20	25	0	3	1
EE	81	72	30	10	23	4	1	0	1
IE	48	47	39	25	39	16	1	1	0
EL	81	78	61	16	14	7	1	0	0
ES	65	56	39	14	20	10	1	1	1
FR	63	49	51	27	22	20	1	1	1
HR	49	70	47	13	16	10	0	0	0
IT	63	51	56	22	24	10	1	0	1
CY	80	64	41	11	11	10	0	1	1
LV	74	67	33	13	21	3	2	0	1
LT	78	72	22	15	20	4	2	0	0
LU	65	30	40	33	16	22	3	1	0
HU	60	64	45	32	26	7	1	0	0
MT	70	43	28	20	30	13	1	0	0
NL	60	46	24	26	30	32	2	2	0
AT	53	48	52	40	28	23	1	0	0
PL	59	58	33	14	22	8	1	2	3
PT	81	70	40	21	13	5	1	0	1
RO	64	57	39	22	21	5	1	1	1
SI	65	49	52	13	19	8	2	0	0
SK	53	73	38	11	29	5	2	0	2
FI	65	53	59	12	34	18	2	0	0
SE	44	39	42	46	16	47	1	1	1
UK	50	46	20	18	31	24	2	2	1

1st MOST FREQUENTLY MENTIONED ITEM

2nd MOST FREQUENTLY MENTIONED ITEM

3rd MOST FREQUENTLY MENTIONED ITEM

Base: Respondents who buy FAPs (N=21,865)

4 Preferences regarding wild or farmed products

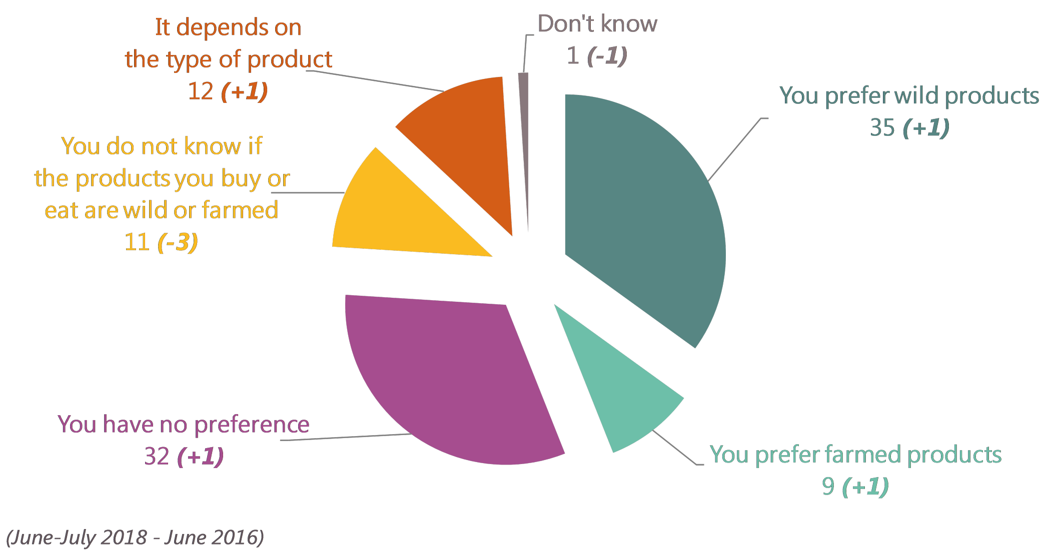
The largest proportion of respondents prefer wild products, but nearly as many have no preference

It was explained to respondents who buy or eat fishery and aquaculture products that these can be wild or farmed. They were then asked to indicate their preferences[19].

More than a third of these respondents **prefer wild products** (35%). In contrast, less than one in ten **prefer farmed products** (9%). However, just under a third indicated they have **no preference** (32%).

More than one in ten respondents say they **don't know if the fishery or aquaculture products they buy or eat are wild or farmed** (11%), while 12% of respondents say that it **depends on the type of product**.

QB6 Fishery and aquaculture products can be wild or farmed. Would you say that...
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

There has been almost no change in opinion since the last survey.

[19] QB6.. Fishery and aquaculture products can be wild or farmed. Would you say that...: You prefer wild products; You prefer farmed products; You have no preference; You do not know if the products you buy or eat are wild or farmed; It depends on the type of product; Don't know.

Greece and Malta (both 62%) stand out for the large majority of respondents who buy or eat FAPs expressing a preference for **wild products**, followed by half (50%) of respondents in France and Cyprus. In all other countries, only a minority of those who buy or eat FAPs give this answer, but this ranges from nearly half (48%) in Denmark and Portugal to less than a fifth (19%) in Czechia and Slovakia. In 15 of the 28 Member States, wild products are the most frequently mentioned preference.

In all countries, less than a fifth of respondents express a preference for **farmed products**, and in 20 of the 28 Member States, no more than one in ten do so.

In all but three countries, at least a fifth (20%) of respondents who buy or eat FAPs have **no preference** between wild or farmed products, and in the United Kingdom (44%) and Romania (45%) over four in ten respondents give this response.

In Czechia, over a third of respondents who buy or eat FAPs say that they **do not know if the products they eat are wild or farmed**, and this is the most frequent answer given in this country. Elsewhere, the proportion of respondents is significantly lower.

The proportion of respondents who say their preference for wild or farmed FAPs **depends on the type of product** varies from less than one in ten in France and the United Kingdom (both 6%) to over a fifth (21%) in Italy.

The proportion of respondents who buy or eat FAPs who **prefer wild products** has increased in Denmark, Belgium (both +7 pp) and the United Kingdom (+5 pp), while no country has registered a significant decrease.

There has been minimal change in the case of those who **prefer farmer products**, with the only marked change was in Croatia (+6 pp).

In four countries the proportion of respondents who say they **have no preference** has increased by more than four percentage points. This is the case in Romania (+9 pp), Hungary (+8 pp), Spain and Lithuania (both +6 pp). The biggest decrease is found in Cyprus (-8 pp) while other notable decreases have also occurred in Bulgaria, the United Kingdom (both -6 pp) and Czechia (-5 pp).

There have not been any relevant increases in the case of those who **do not know if the products they buy or eat are wild of farmed**, while in six countries the proportion of respondents who said this has decreased by more than four points.

The proportion of respondents who mention that their preference **depends on the type of product** has changed considerably in nine countries. The largest increases are registered in Poland (+9 pp), Slovakia, Cyprus (+7 pp) and Czechia (+5 pp), while the biggest decrease occurred in Belgium (-7 pp).

5 Preferences regarding sea or freshwater products

Respondents are most likely to prefer products from the sea, but a large proportion have no preference

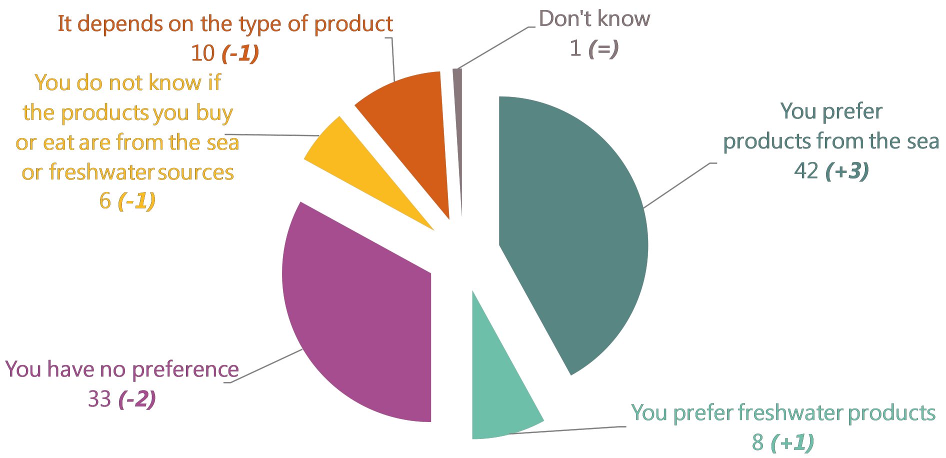
It was explained to respondents who buy or eat fishery and aquaculture products that these can come from the sea or from freshwater sources. They were then asked about their preference[20].

The most common preference, mentioned by 42% of respondents, is for **products from the sea**, followed by those who have **no preference** (33%).

Only 8% of respondents indicate they prefer **freshwater products** while 10% say that **it depends on the product**.

A further 6% are **not sure if the products they buy come from the sea or freshwater sources**.

QB7 Fishery and aquaculture products can come from the sea or from freshwater sources. Would you say that...
(% - EU)



(June-July 2018 - June 2016)

Base: Respondents who buy or eat FAPs (N=23,968)

There have been almost no changes in opinion since the previous survey.

[20] QB7. Fishery and aquaculture products can come from the sea or from freshwater sources. Would you say that...: You prefer products from the sea; You prefer freshwater products; You have no preference; You do not know if the products you buy or eat are from the sea or freshwater sources; It depends on the type of product; Don't know.

Analysis at the *country level* shows some significant differences. In the case of those who prefer **products from the sea**, in seven countries a majority of those who eat or buy FAPs give this answer, ranging from just over half (53%) of those polled in France to over eight in ten respondents in Greece (83%).

Hungary (36%) stands out for the particularly large majority of respondents who prefer **freshwater products**, followed by Romania (27%) and Finland (23%). Elsewhere, no more than a fifth of respondents express this preference.

The proportion of respondents who **have no preference** varies quite considerably across countries. In Estonia, over half (51%) of those polled give this answer, as do large shares of respondents in Romania (46%) and the United Kingdom (48%). Less than a fifth give this answer in Latvia (12%), Portugal (15%) and Greece (19%).

In all but three countries no more than one in respondents say that they **do not know if the products they buy or eat are from the sea or freshwater sources**. The exceptions are Hungary (12%), Slovakia (13%) and Belgium (15%). In 19 countries, this is the least frequent answer.

Overall, there have not been substantial changes at the country level since the June 2016 survey.

In the case of **products from the sea**, the proportion of respondents in Portugal and Sweden who give this answer has increased by eight percentage points, but there are no decreases of similar magnitude.

There has been minimal change in the case of those who **prefer freshwater products**, and in seven countries there has been no change at all. The most significant increases have occurred in Romania (+7 pp) and Finland (+6 pp).

In 17 countries, the proportion of respondents who **have no preference** between sea and freshwater products has declined since the last survey, although in most cases only by a small amount. The largest decrease is observed in Sweden (-8 pp), followed by the United Kingdom (-6 p), while Denmark (+6 pp) has seen the biggest increase.

The picture is similar in the case of those who **do not know whether the products they buy or eat are from the sea or freshwater sources**. In 20 Member States the proportion of respondents who give this answer has decreased, but only in Romania (-8 pp) and Spain (-6 pp) have there been significant changes. No country has seen a significant increase in the proportion of respondents who do not know the provenance of the products.

The proportion of respondents who say that their preference **depends on the type of product** has decreased by six percentage points in Belgium, but in all other countries there has been minimal or no change.

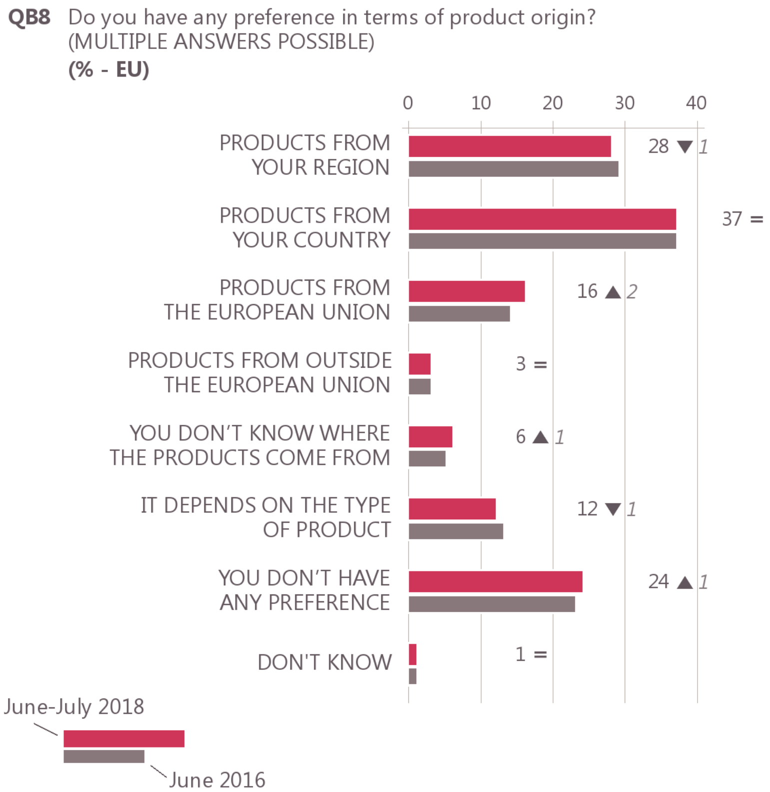
6 Preferences in terms of origin of the products

More than one third of respondents who consume fishery and aquaculture products prefer products from their own country

Respondents who buy or eat fishery and aquaculture products were asked if they had any preferences about the origin of these products[21].

The relative majority of respondents (37%) **prefer products from their own countries**, followed by **products from their region** (28%). More than one in ten say they prefer **products from the EU** (16%), whilst only 3% prefer products from **outside of the EU**.

Slightly less than a quarter indicate they **don't have a preference** (24%), more than one in ten respondents say it **depends on the type of product** (12%) and a small proportion say they **don't know where the products come from** (6%).



Base: Respondents who buy or eat FAPs (N=23,968)

There have been no significant changes in these proportions since the last survey.

[21] QB8. Do you have any preference in terms of product origin? (MULTIPLE ANSWERS POSSIBLE) Products from your region; Products from your country; Products from the European Union; Products from outside the European Union; You don't know where the products come from; It depends on the type of product; You don't have any preference; Don't know.

There are substantial differences at the *country level* in respondents' preferences for the sources of the products they buy.

In 20 of the EU 28 countries, the leading preference in terms of origin is **products from your own country**. While in all countries surveyed this option is among the three most frequently chosen, there are nevertheless large differences in the proportions of respondents who give this answer.

The second most frequently mentioned preference in terms of origin is **products from your region,** and in three Member States, the largest proportion of respondents say they prefer **products from the EU**.

Less than one in ten respondents in all EU countries mentioned preferring **products from outside of the EU**, with the highest proportion with this view found in Austria (8%).

In most countries, fewer than one in ten respondents **don't know where the products come from**. The exceptions are Czechia (12%) and Belgium (14%).

Less than a quarter of all respondents in all countries say it **depends on the type of product**.

Finally, there are significant differences in the proportions of respondents who don't **have any preference**. In all but three countries less than a third of those polled give this answer. In six countries – including the three with the highest proportions of those who say they do not have any preference – this is the most frequent, or joint most frequent, answer.

In nine of the 28 Member States the proportion of respondents who prefer **products from their region** has increased since the last survey, but in the remaining countries this figure has fallen: in Slovenia the proportion of respondents giving this answer has declined by 14 percentage points.

Similarly, in nine countries the proportion of respondents who prefer **products from their country** has increased, while decreasing in the remaining 19 Member States. The only significant increase has occurred in Hungary (+6 pp).

In the case of **products from the European Union**, 23 countries have seen an increase in the proportion of respondents who mention this point of origin, with the highest increases in Hungary (+7 pp) and Slovakia (+8 pp). Romania (-5 pp) and Malta (-11 pp) are the only countries in which the proportion of respondents preferring EU products has decreased.

In the case of those who **don't know where the products come from**, there has been very little change in most countries since the last survey. In Slovakia and Portugal, the proportion who give this answer has decreased by six percentage points, but there are no significant changes elsewhere.

The same is true of those who say that their preference **depends on the type of product**, with the only significant change in Romania (-6 pp).

Finally, the proportion of respondents who say that they **do not have any preference** has increased in 21 of the 28 Member States and decreased in the remainder. Apart from Portugal (+6 pp) and Slovenia (+7 pp) these changes are small.

QB8 Do you have any preference in terms of product origin?
(MULTIPLE ANSWERS POSSIBLE)
(%)

	Products from your region	Products from your country	Products from the European Union	Products from outside the European Union	You don't know where the products come from	It depends on the type of product	You don't have any preference	Don't know
EU28	28	37	16	3	6	12	24	1
BE	16	28	33	7	14	14	17	0
BG	24	32	14	3	7	20	23	2
CZ	13	19	14	3	12	19	31	1
DK	24	42	18	3	4	14	23	1
DE	27	26	27	6	9	15	24	1
EE	26	34	14	2	8	15	29	0
IE	34	48	19	3	3	6	25	0
EL	47	75	15	2	2	8	7	0
ES	40	42	11	1	5	7	25	0
FR	36	49	15	1	5	8	16	1
HR	35	57	13	3	4	6	11	0
IT	38	48	13	3	5	12	6	0
CY	33	53	16	1	4	13	20	0
LV	26	31	10	2	8	22	20	0
LT	10	20	16	3	8	16	43	0
LU	12	19	47	4	5	16	17	1
HU	24	32	16	6	6	19	20	0
MT	21	55	15	1	2	9	24	0
NL	17	17	18	2	7	14	42	0
AT	28	33	23	8	8	19	18	1
PL	17	32	16	3	7	11	32	2
PT	25	55	12	1	1	18	20	1
RO	25	45	12	7	5	8	22	0
SI	29	48	27	2	4	9	21	0
SK	15	23	22	2	9	20	32	1
FI	37	62	15	5	2	9	11	1
SE	39	46	19	4	3	18	11	0
UK	16	22	7	1	2	9	51	1

1st MOST FREQUENTLY MENTIONED ITEM

2nd MOST FREQUENTLY MENTIONED ITEM

3rd MOST FREQUENTLY MENTIONED ITEM

Base: Respondents who buy or eat FAPs (N=23,968)

III. INFORMATION ON FISHERY AND AQUACULTURE PRODUCTS

1 Sources of information on fishery and aquaculture products

Respondents who consume fishery and aquaculture products are most likely to get information about these products from the store employee or fishmonger

Respondents who buy or eat FAPs were asked where they get most of the information about these products[22].

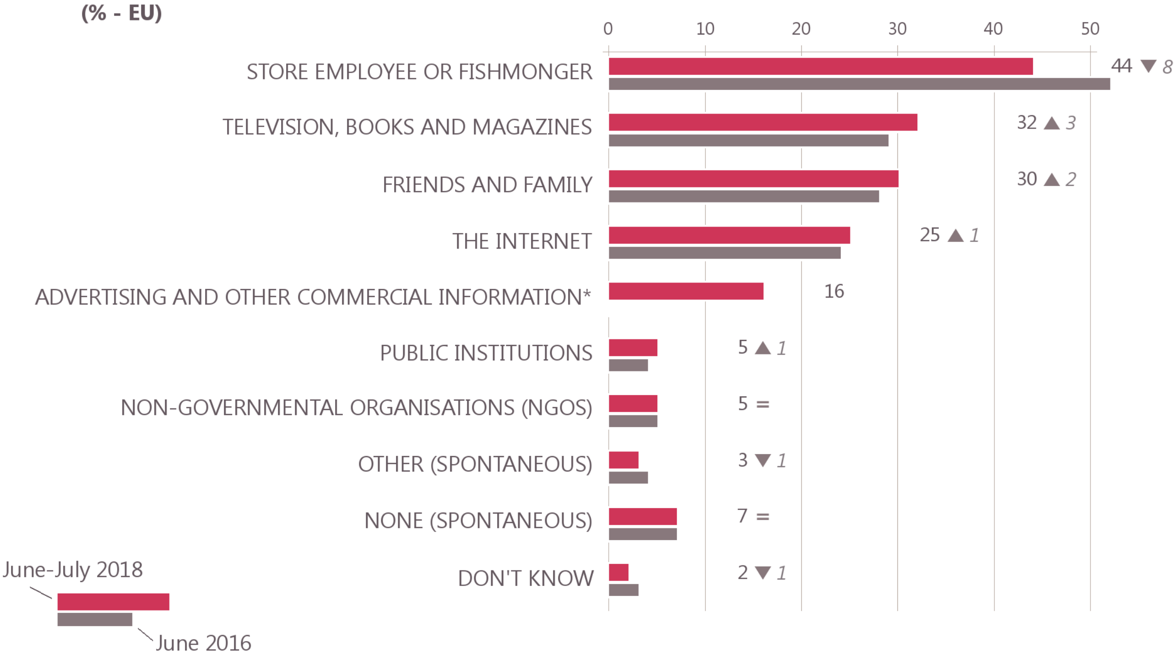
Over four in ten respondents (44%) say they get most information about fishery and aquaculture products **from the store employee or fishmonger**.

The second most mentioned source is **television, books and magazines** (32%), slightly more than respondents who say they mostly refer to **friends and family** (30%). A quarter of respondents say they get most information about these products from **the internet** (25%).

Less than a fifth get information from **advertising and other commercial information** (16%), while very few get information from **non-government organisations** (NGOs) or **public institutions** (both 5%).

Less than one in ten spontaneously mention **other** sources (3%), **none** (7%) or say that they **don't know** (2%).

QB16 From which sources do you get most of your information about fishery and aquaculture products?
(MAX. 3 ANSWERS)
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

[22] QB16. From which sources do you get most of your information about fishery and aquaculture products? Friends and family; Television, books and magazines; The internet; Public institutions; Non-governmental organisations (NGOs); Store employee or fishmonger; Advertising and other commercial information; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

In most cases, there has been no change since the last survey. The most noticeable difference is in the proportion of those who get their information from store employees or fishmongers, which has decreased by eight percentage points. It is possible that this total has been affected by the inclusion of a new category in this survey, 'advertising and other commercial information'.

Looking at the results at the *country level*, the leading or joint-leading source of information about fishery and aquaculture products in 20 out of 28 Member states is **the store employee or fishmonger**. In all but two countries more than a third of respondents get information from this source. The exceptions are Slovakia (27%) and the United Kingdom (28%).

In all but two cases, less than four in ten in every country mention **television, books and magazines** as a source where they get most of their information about fishery and aquaculture products. The Netherlands (50%) and Germany (46%) stand out as exceptions. In four countries this source of information is the most popular or the joint most popular, in six it is the second most popular, and in a further 14 it is the third most popular.

In seven countries, the leading or joint-leading source of information about fishery and aquaculture products is **friends and family**, and it is the second most important source in a further 11 countries. Across countries, the proportion of respondents who mention this source ranges from at least half in Bulgaria (54%) and Croatia (50%) to less than a quarter in the Netherlands (22%), Germany (23%), France (24%) and the United Kingdom (24%).

The **internet** is the joint-leading source in Slovakia (37%) and the United Kingdom (28%). However, this is the most mentioned source of information in Slovakia together with friends and family and television, books and magazines, while in the United Kingdom it is most mentioned together with store employee or fishmonger and television, books and magazines. Only in three countries, the Netherlands (43%), Malta and Sweden (both 41%), over four in ten respondents mention this source of information.

In all but three countries, **advertising and other commercial information** is not among the three most frequently mentioned sources of information. In only eight countries do at least a fifth of respondents mention this source.

In 25 countries less than one in ten respondents use **public institutions** as a source of information. The exceptions are Sweden (16%), Austria (13%) and Belgium (11%).

Similarly, in 26 countries less than 10% of respondents say **non-government organisations** are their main source. The exceptions are Luxembourg and Sweden (both 12%).

In 27 of the 28 Member States, the proportion of respondents who mention **store employees or fishmongers** as their source of information about fishery and aquaculture products has decreased since the last survey. The exception is Greece, where there has been no change. In all but four countries the decrease is at least five percentage points, and in Romania (-15 pp), Czechia (-14 pp), Croatia, Finland (both -11 pp) and Spain (-10 pp) it is in double digits.

In 17 countries there has been an increase in the proportion of respondents who get their information about these products from **television, books and magazines**, and in an additional five countries there has been no change.

The proportion of respondents who mention **friends and family** as sources of information has increased in 16 countries, although in most cases not by a substantial amount.

In 16 countries, the proportion who mention **the internet** has increased, most notably in Slovakia (+11 pp) but also in Cyprus and Malta (both +7 pp). The Netherlands (-6 pp) is the only country in which the proportion of respondents has significantly decreased.

There have been few changes in the proportion of respondents who mention **public institutions**. While the proportion of respondents who mention this source has increased in 16 countries, only in Sweden (+7 pp) is this in excess of four percentage points.

There have also been very few changes in the case of **non-governmental organisations**: the largest is five percentage points in the Netherlands, and in nine countries there has been no change at all.

2 Clarity of information accompanying fishery and aquaculture products

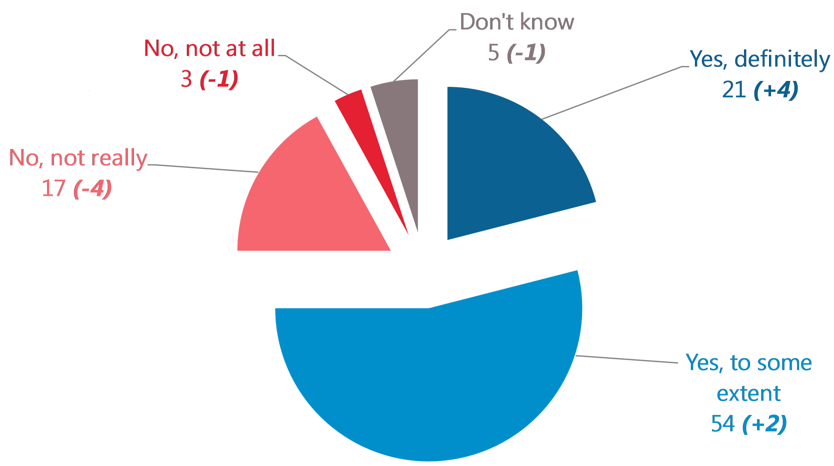
Three quarters of respondents who buy fishery and aquaculture products think information accompanying these products is clear and easy to understand

Respondents who buy fishery or aquaculture products were asked to consider the information accompanying them, and to say whether it is clear and easy to understand[23].

Three quarters (75%) of respondents think the accompanying information is **clear and easy to understand,** with just over half (54%) saying **'yes, to some extent'** and a further 21% who answer **'yes, definitely'**. The proportion of those who think the information is definitely clear and easy to understand has risen by four percentage points since the last survey.

A fifth of respondents do not agree that the information is clear and easy to understand: most of these **don't really** think the information is clear and easy to understand (17%, -4 pp), while 3% **do not think so at all**, and 5% **don't know**.

QB12 Do you think the information accompanying fish or aquaculture products you buy is clear and easy to understand?
(% - EU)



(June-July 2018 - June 2016)

Base: Respondents who buy FAPs (N=21,865)

Analysis at the *country level* shows that more than two thirds of respondents in every country agree the information accompanying fish and aquaculture products is clear and easy to understand.

[23] QB12. Do you think the information accompanying fish or aquaculture products you buy is clear and easy to understand? Yes, definitely; Yes, to some extent; No, not really, No, not at all; Don't Know.

Countries with the highest levels of agreement include Finland (90%), Ireland (89%) the United Kingdom and Slovenia (both 86%), while the lowest proportion of respondents who agree with this are found in Bulgaria, France, Italy and Latvia (all 69%).

In all but three countries, the proportion of respondents who think the information is **definitely** clear and easy to understand has increased since 2016, and in several countries by a significant amount.

In 17 countries, there has been an increase in the proportion of respondents who agree **to some extent** that the information is clear and easy to understand. The largest changes have occurred in Belgium (+11 pp) and Croatia (+10 pp), while there has been no change in Greece.

There have been very few significant changes in the proportions of those who think that the information is **not at all** clear. The most significant change has occurred in Belgium (-5 pp).

3 Relevance of mandatory information

a. Information on labels of fresh, frozen, smoked and dried products

Respondents who buy or eat fishery and aquaculture products think the most important information on the labels of fresh, frozen, smoked and dried products is the "use by" or "best before" date

Respondents who buy or eat fishery or aquaculture products were asked how important various types of information were to them on some FAPs like fresh, frozen, smoked and dried products[24].

The most important information, mentioned by 94% of respondents as important, is the **"use by" or "best before" date**. Almost three quarters of respondents say it is '*very important*' (73%) and over a fifth (21%) say it is '*fairly important*'.

More than four out of five respondents (89%) think **the name of the product and the species** is important. More than half (54%) say it is '*very important*' whilst 35% say it is '*fairly important*'.

Whether the product was previously frozen is mentioned by more than four out five respondents (86%) as an important piece of information to have on the label of fishery and aquaculture products. More than half of the respondents (56%) think this is '*very important*' and three in ten (30%) think it is '*fairly important*'.

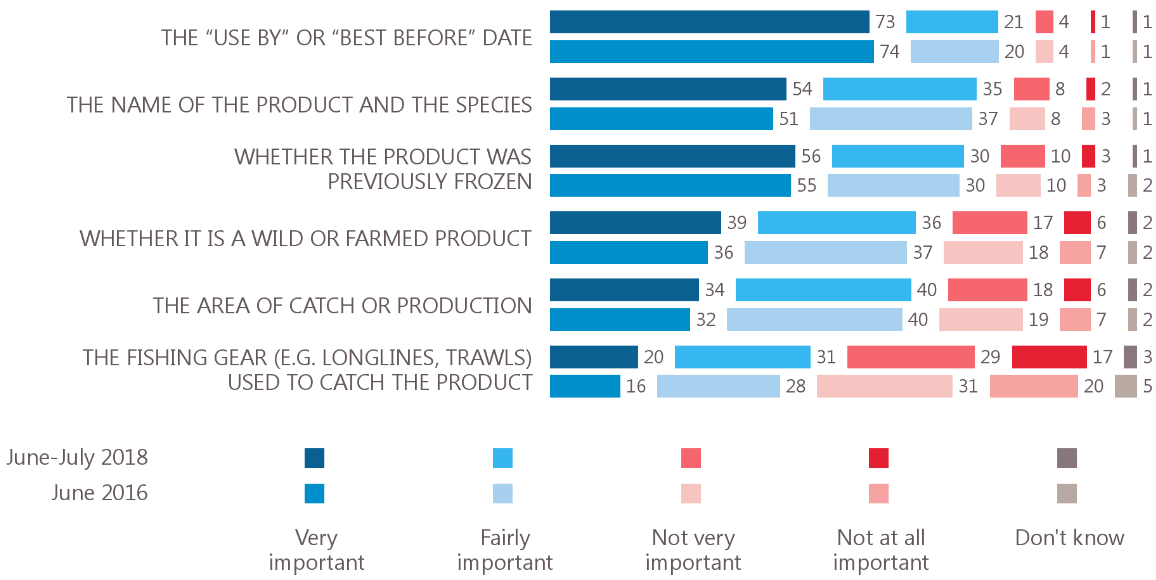
Three quarters of respondents (75%), think the distinction between **a wild or a farmed product** is important information to be put on labels, with just under four in ten (39%) saying this is '*very important*', and nearly as many (36%) saying it is '*fairly important*'.

The area of catch or production is important to nearly three quarters of respondents (74%). Four in ten (40%) think it is '*fairly important*' compared with just over a third (34%) who think it is '*very important*'.

Opinion is somewhat more divided on the importance of information on **'the fishing gear (e.g. longlines, trawls) used to catch the product'** on the labels. Just over half (51%) think that it is important, with a fifth (20%) thinking it is '*very important*'. However, nearly a fifth (17%) think that it is '*not at all important*'.

[24] QB13. How important or not is it to find the following information on labels of fishery and aquaculture products like fresh, frozen, smoked and dried products? The name of the product and the species; Whether it is a wild or farmed product; The area of catch or production; The fishing gear (e.g. longlines, trawls) used to catch the product; Whether the product was previously frozen; The use by or best before dates. Very important; Fairly important; Not very important; Not at all important; Don't know.

QB13 How important or not is it to find the following information on labels of fishery and aquaculture products like fresh, frozen, smoked and dried products?
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

In most cases, there has not been any significant change since the last survey. The main exception is in the case of the fishing gear used to catch the product, with the proportion who think this information is very important increasing by four percentage points, and the proportion who think that this is not at all important decreasing by three points.

In all 28 Member States, the most important piece of information is the **"use by" or "best before" date**. In all but two countries at least nine in ten (90%) respondents who buy or eat FAPs give this answer, and in Cyprus (99%), Greece (98%) and Spain (98%) nearly all respondents do.

In all countries at least eight in ten respondents say that **the name of the product and the species** should be displayed on labels of fishery and aquaculture products, and in 13 countries more than nine in ten hold this view.

At least seven in ten respondents in all countries, and at least eight in ten in 24 countries, think that it is important to provide information about **whether the product was previously frozen**.

There is more variation concerning the importance of **whether a product is wild or farmed**. In 19 of the 28 Member States at least two thirds of respondents say that this information is important, and in three cases at least nine in ten do. There is a similar spread of views in the case of **the area of catch or production**.

In all countries, the lowest proportion of respondents mention **the fishing gear used to catch the product**. However, the proportion of respondents who give this answer varies from one in ten (10%) of those polled in Estonia, and slightly more in Latvia (15%) and Lithuania (18%), to seven in ten (70%) respondents in Italy.

Compared to the previous survey, there have been minimal changes among those who think that is important to find **the "use by" or "best before date"** on FAPs labels. The picture is similar in the case of those who think that is important to find information about **the name of the product and the species**.

There have been few significant changes in the proportions of those who think that is important to find information about **whether the product was previously frozen** on FAP labels. The largest increase occurred in Czechia (+5 pp), and the largest decrease was registered in Estonia (-6 pp).

In seven countries the proportion of respondents who think that it is important to find information about **whether the product is wild or farmed** on FAPs labels has increased. The largest increases occurred in Ireland (+9 pp), Cyprus (+8 pp), Spain and Slovakia (both +7 pp), while the only significant decrease occurred in Austria (-7 pp).

In 19 countries, there has been an increase in the proportion of respondents who think that **the area of catch and production** is an important piece of information to find on FAP labels, and in six of these by a significant amount.

Overall, respondents are more likely to think that finding information about the **fishing gear (e.g. longlines, trawls) used to catch the product** is important compared to the previous edition of the survey (+7 pp). This is particularly the case in France (+13 pp), Luxembourg, Italy (both +11 pp), and Spain (+10 pp), while the only relevant decrease was registered in Austria (-7 pp).

b. Information that should be on tinned or prepared products

The origin of the product used and the species are the two most important features respondents consumers think should be on the labels of tinned or prepared products

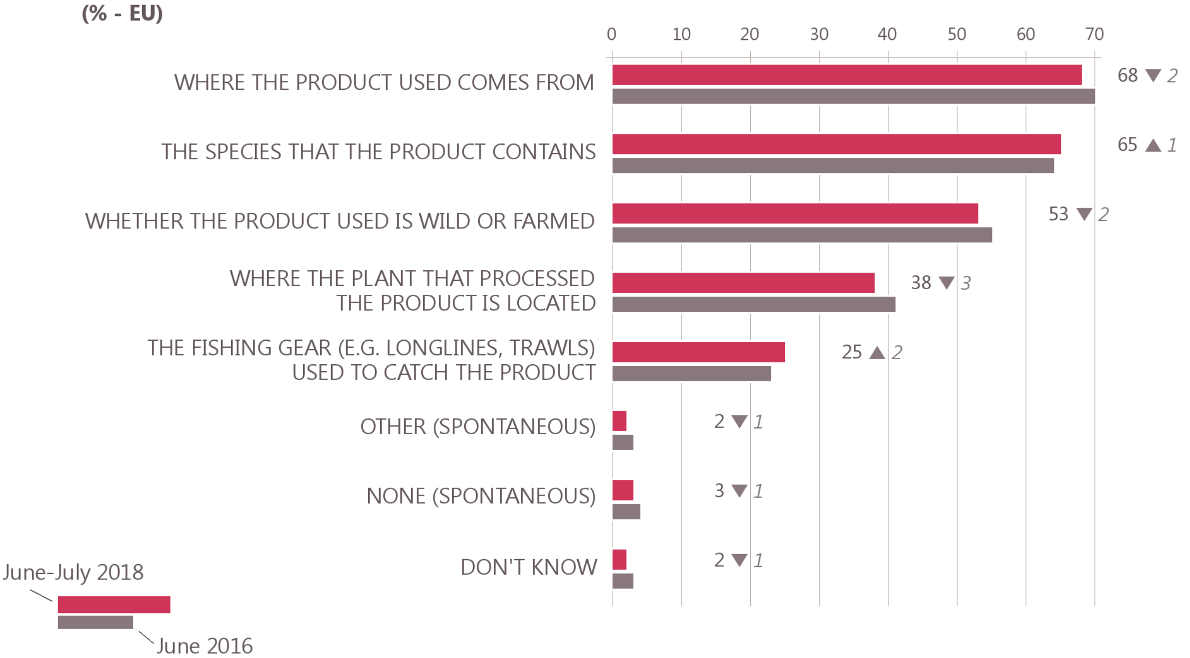
Respondents who buy or eat fishery or aquaculture products were asked which information should be mentioned on the labels of tinned or prepared products[25].

The most frequently mentioned element is **'where the product used comes from'** with over two thirds (68%) of respondents saying this.

Just under two thirds believe **the species that the product contains** is important (65%) and more than half think whether the product used **is wild or farmed** (53%) should be on these labels.

Just under four in ten (38%) think **the plant that processed the product** should be indicated on the label, and a quarter (25%) think that **the fishing gear used to catch the product** should be shown.

QB14 Which of the following information do you think should be mentioned on the label of tinned or prepared products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

There have been very few changes since the last survey, with the largest being a three-point decrease in the proportion of respondents who say that information about the location of the plant that processed the product should be included.

[25] QB15. Which of the following information do you think should be mentioned on the label of tinned or prepared products? (MULTIPLE ANSWERS POSSIBLE) The species that the product contains; Where the product comes from; Whether the product used is wild or farmed; The fishing gear (e.g. longlines, trawls) used to catch the product; Where the plant that processed the product is located; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

At the *country level*, **where the product used comes from** is the most popular answer in 16 of the 28 Member States. Finland (88%) stands out for a particularly high level of respondents who choose this option, followed by Sweden (81%). In all countries, a majority of respondents give this answer, the lowest proportion being in Lithuania, where only just over half (53%) think this way.

There is a similar spread of responses for those who choose the option **the species that the product contains**. In 13 countries, this is the most frequently mentioned option

There is a wider spread of responses among those who think **whether the product used is wild or farmed** should be mentioned on labels of tinned or prepared products. In Slovakia, less than a third (31%) of respondents hold this view, as do a minority of those polled in a further nine countries. In the remaining 18 countries, at least half of the respondents who buy or eat FAPs give this response, ranging from half of the respondents in Belgium (50%) to seven in ten (70%) in Greece.

In all but two countries, only a minority of respondents think that **where the plant that processed the product is located** should be mentioned on the label.

In all countries, only a minority of respondents think that **the fishing gear used to catch the product** should be mentioned on the label of tinned and prepared products, and in 27 countries this is the least common response.

There have been few substantial changes at the country level since the last survey. For respondents who say that information about **where the product used comes from** should be mentioned on the label, in ten of the 28 Member States the proportion of respondents giving this answer has increased since the last survey. In 15 countries the proportion has decreased, but in most cases by no more than five points.

The proportion of respondents who think that labels on tinned or prepared products should give information about **the species that the product contains** has increased by 13 percentage points in Germany, and by a smaller amount in ten other countries. In 14 countries the proportion of respondents who give this answer has decreased, with the largest change occurring in Belgium (-11 pp).

In the case of **whether the product used is wild or farmed**, opinion has not changed much since the last survey, with no changes in excess of five percentage points.

In 20 Member States, the proportion of respondents who say that these labels should contain information about **where the plant that processed the product is located** has decreased since the last survey, in line with the slight overall decline in this figure at the EU level.

Finally, the proportion of respondents who think that information about **the fishing gear used to catch the product** should be included on labels has increased in 14 countries, with the largest changes observed in France (+10 pp) and Luxembourg (+7 pp).

4 Interest in voluntary information

More than three quarters of respondents who buy or eat FAPs think the date of catch or production should be mentioned on the labels of all fishery and aquaculture products

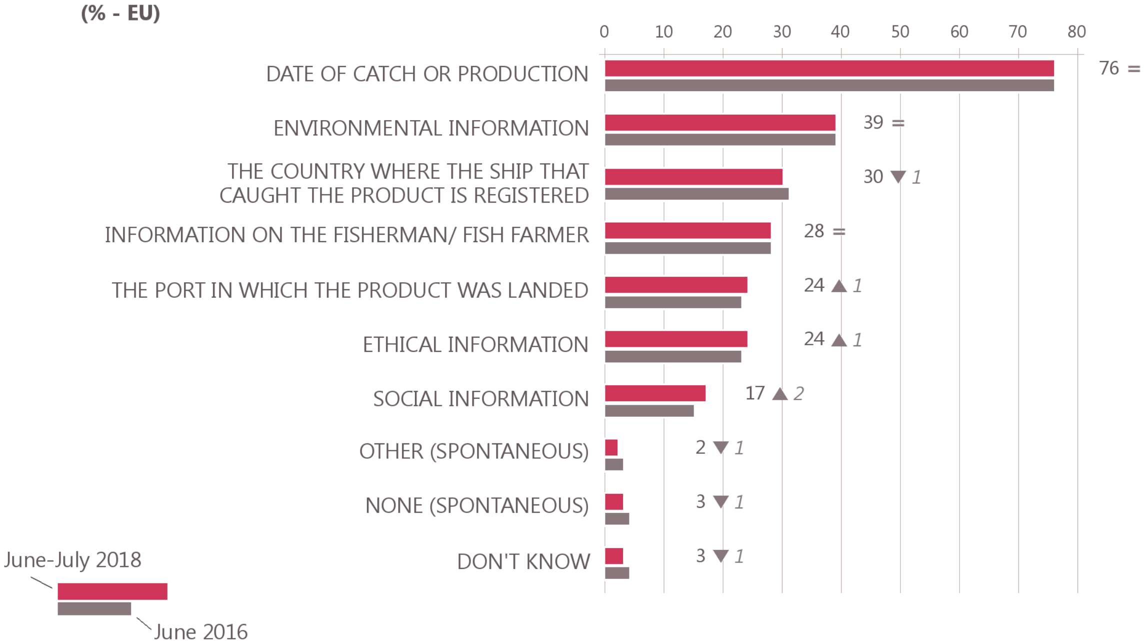
Respondents who buy or eat fishery and aquaculture products were asked what additional information should be mentioned on the labels of all these products[26].

Just over three quarters of respondents (76%) think that the **date of catch or production** should be mentioned on the labels of all fishery and aquaculture products. This is significantly more likely to be mentioned by respondents than any other item, and is the only item that the majority of respondents think should be on labels.

The second most frequently mentioned item is **environmental information**, which nearly four in ten (39%) think should be on labels, followed by information about the **country where the ship that caught the product is registered** (30%) and **the fisherman/fish farmer** (28%).

Just under a quarter of respondents would like to see **ethical information** or information about **the port in which the product was landed** (both 24%), but less than one in ten (17%) believe **social information** is important enough to be mentioned on labels.

QB15 Which of the following do you think should be mentioned on the label for all fishery and aquaculture products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: Respondents who buy or eat FAPs (N=23,968)

There has been no significant change since the last survey in the proportions of respondents selecting the various options offered by this question.

[26] QB15. Which of the following do you think should be mentioned on the label for all fishery and aquaculture products? (MULTIPLE ANSWERS POSSIBLE): Date of catch or production; The port in which the product was landed; The country of origin of the ship that caught the product; Ethical information; Social information; Environmental information; Information on the fisherman / fish farmer; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

In all EU Member States, the piece of information that the largest proportion of respondents think should be on the labels of fishery and aquaculture products is **the date of catch or production**.

There are significant differences in the case of **environmental information.** Sweden (68%) stands out with over two thirds of respondents mentioning this item of information, followed by nearly six in ten (57%) of those polled in the Netherlands. In all other countries, the proportion of those who give this response ranges from nearly half of those polled in Austria, Luxembourg and Malta (both 48%) to less than a fifth in Czechia (14%) and around a fifth in Lithuania (18%), Estonia (20%), Latvia and Slovakia (both 21%).

In all countries, only a minority of respondents mention the **country where the ship that caught the product is registered**, but again this varies substantially. In Greece, nearly half (45%) think that labels should contain this information, as do around four in ten in Hungary (38%), Austria and Ireland (both 39%) and France (41%). On the other hand, just over one in ten respondents in Estonia and Latvia (both 14%) think this information should be mentioned.

In all but five countries no more than a third of respondents think that **information on the fisherman/fish farmer** should be on the labels of fishery and aquaculture products.

No more than a third of respondents say that **the port in which the product was landed** should be on labels. Respondents in Austria (33%), Ireland and France (both 32%) are most likely to give this answer.

In all but two countries no more than a third of respondents think that **ethical information** should be on the labels of FAPs.

In all but three of the 28 Member States, **social information** is the least popular option. A quarter (25%) of those surveyed in Malta say this item of information should be on the labels of all fishery and aquaculture products, as do around a fifth in Italy, Austria, Luxembourg, Sweden (all 20%) and just over a fifth in Romania (22%).

In 15 of the 28 Member States, the proportion of respondents who say that the **date of catch or production** should be given on the labels of fishery and aquaculture products has increased, while this figure has decreased in 12 countries. In all but two cases, these changes are small: the exceptions are Croatia (+6 pp) and Malta (-10 pp).

In 13 countries, the proportion of respondents who mention **environmental information** has increased, with the largest changes occurring in Malta (+14 pp), Slovakia (+8 pp) and Greece (+6 pp). In 12 countries, the proportion of respondents who mention this information has decreased.

There have been several significant changes in the proportions of respondents who say that information about **the country where the ship that caught the product is registered** should be included on these labels. In Hungary, the proportion of respondents who give this answer has risen by 20 percentage points. On the other hand, there have been significant decreases in Sweden (-19 pp), Croatia (-15 pp), Finland (-13 pp) and Romania (-11 pp).

In 15 countries there has been a decrease in the proportion of respondents who say that **information on the fisherman / fish farmer** should be on these labels. The most significant decrease is in Romania (-12 pp), while there have been no significant increases.

Most countries have seen only minimal change in the proportions of respondents who think that information on **the port in which the product was landed** should be included. In 16 countries, there has been an increase, with the largest changes noted in Bulgaria (+7 pp), Slovakia and Slovenia (both +9 pp). There have been no significant decreases in this figure in any of the countries surveyed.

In all but six cases, there has been no change exceeding five percentage points in the proportion of respondents who think that **ethical information** should be included on these labels. The most significant increases have occurred in Hungary, Malta (both +10 pp), Cyprus (+7 pp), Romania and Slovakia (both +6 pp), while Belgium (-13 pp) stands out for a large decrease in the proportion of respondents mentioning this item of information.

In 18 countries, the proportion of respondents mentioning **social information** has increased since the last survey. Yet in most cases the change is minimal, with the exception of Slovakia (+7 pp), the Netherlands, Malta and Hungary (all +6 pp). The only significant decrease is in Belgium (-8 pp).

a. Trust in different types of information accompanying fishery and aquaculture products

The majority of respondents who buy fishery and aquaculture products trust all the different types of information accompanying the products

In order to understand the level of trust in the various types of information accompanying fishery or aquaculture products, respondents who buy these products were asked to what extent they trust each type[27].

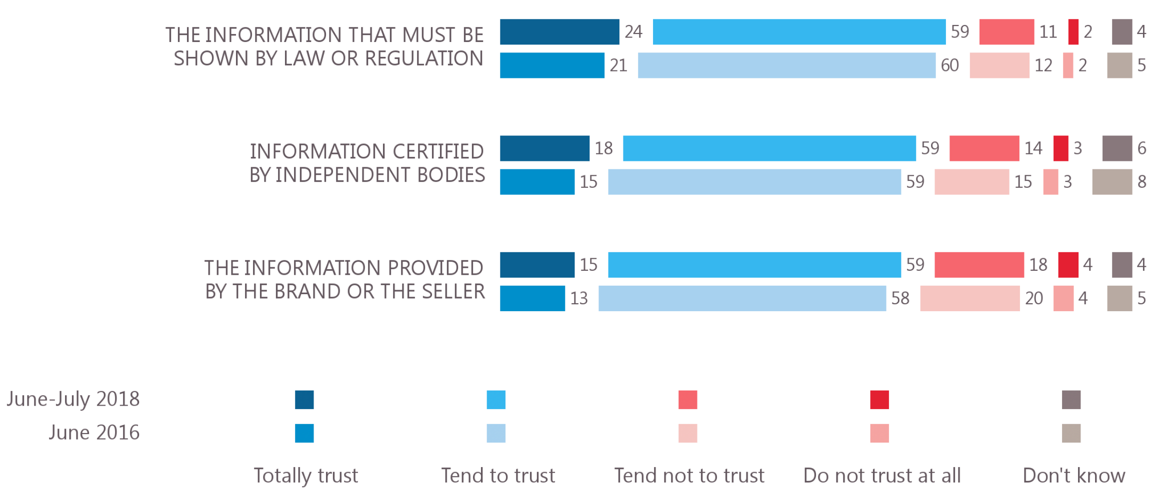
The majority of respondents who buy fishery or aquaculture products trust all types of information that accompany these products, with 83% t*rusting information that must be shown by law or regulation*, 77% of respondents trusting the *information certified by independent bodies* and 74% having trust in the *information provided by the brand or the seller*.

In terms of the **information that must be shown by law or regulation**, nearly a quarter (24%) '*totally trust*' this information, whilst the majority (59%) '*tend to trust*' it.

The majority of respondents '*tend to trust*' (59%) the **information certified by independent bodies,** and nearly a fifth (18%) '*totally trust*' this information.

Finally, the majority of respondents (59%) '*tend to trust*' the **information provided by the brand or the seller**, whilst 15% say they '*totally trust*' it. However, nearly one in five (18%) '*tend not to trust*' this information, and across all three types of information presented to respondents, this type is the most likely not to be trusted (22%).

QB11 To what extent do you trust or not the following information accompanying fishery or aquaculture products?
(% - EU)



Base: Respondents who buy FAPs (N=21,865)

There has been very little change since the June 2016 survey, although in all cases the proportion of respondents who totally trust the information has increased.

[27] QB11. To what extent do you trust or not the following information accompanying fish or aquaculture products? The information that must be shown by law or regulation; Information certified by independent bodies; The information provided by the brand or the seller. Completely trust; Tend to trust; Tend not to trust; Do not trust at all; Don't know.

In all countries, at least two thirds of respondents trust the **information that must be shown by law or regulation**, and in 21 countries at least eight in ten do. The highest proportion of respondents who trust this source of information is found in Finland, Ireland and Sweden (all 92%).

A majority of respondents in all countries trust **information that has been certified by independent bodies**, and in all but two cases at least two thirds of those polled trust this information. The exceptions are Estonia (60%) and Latvia (55%).

The largest country-level differences are observed in the case of trust in the **information provided by the brand or seller**, although it should be noted that in all countries at least a majority express some degree of trust in this information. Finland stands out on this question, with more than nine in ten (94%) expressing trust, closely followed by Portugal (89%) and Ireland (87%). At the other end of the scale, in Latvia (62%), France (63%) and Croatia (64%) less than two thirds of respondents trust information provided by the brand or seller, while in the Netherlands less than six in ten (56%) do.

CONCLUSION

This Special Eurobarometer survey confirms the majority of the findings of the June 2016 survey, suggesting that the habits, opinions and attitudes regarding **fishery and aquaculture products** are quite stable. On many questions, there has been no significant change since the previous survey, and most changes at the country level are small in magnitude.

The survey found that most respondents (70%) **eat fishery and aquaculture products at home** at least once a month, and a significant minority (41%) do so at least once a week. However, they are less likely to consume them in restaurants as frequently. Unsurprisingly, respondents in EU countries with large coastlines or expanses of water surrounding them are more likely than those living in land-locked countries to be eating fishery or aquaculture products on a frequent basis. Hungary stands out for particularly low rates of consumption both at home and out-of-home.

The majority of respondents **buy fishery and aquaculture products** at least once a month. In most EU countries, the grocery store or supermarket is where the majority purchase these products, followed by the fishmonger, market hall or specialist store.

Considering different types of product, the majority of respondents who buy FAPs are **more likely to buy frozen, fresh and tinned products** than they are to buy smoked, salted, dried or in brine products on a regular basis. Most respondents, however, say they do not buy breaded products and ready meals with the same frequency. This broad picture disguises significant diversity at the country level in the types of FAPs purchased.

Fishery and aquaculture products that have been processed, such as by being **filleted** (50%) or **cleaned** (40%) are more popular than **whole products**, which are preferred by just over a quarter (27%) of respondents.

Trying new fishery and aquaculture products is appealing to respondents. While they do not generally seem to mind where they try the new products, respondents are most likely to say they try them at home (65%) compared with promotional events or in restaurants (both 59%). They are also more likely to take suggestions for products from family and friends, rather than from references on TV, websites, books or magazines.

Price seems to be an important factor deterring respondents from eating or buying more fishery and aquaculture products, although once again there is substantial variation at the country level on this question. Similarly, respondents would be more likely to eat more FAPs if they had **better choice and the points of sale were more diverse**.

The characteristics of FAPs are by far the most important criterion that determines whether respondents opt for these products, with nearly half (49%) of those who do not eat FAPs giving the reason that they **do not like the taste, smell or appearance** of these products. While high prices are an important factor preventing increased consumption of FAPs, they do not discourage respondents from purchasing them. Respondents are as likely to avoid FAPs because they are vegetarian or vegan as they are to avoid these products because of the cost (16%).

Respondents are most likely to buy fishery and aquaculture products because **they are healthy** (74%) or **because they taste good** (59%), while other considerations, such as how easy they are to prepare or to digest, are significantly less important influences on purchasing decisions.

When purchasing these products, their **appearance** (59%) and **cost** (52%) are the most important factors, while a significant minority consider **origin** (41%) an important aspect when buying these products. These three criteria are the most important in the majority of countries, regardless of the order of their importance.

Respondents are more likely to express a preference for **wild products** (35%) over **farmed products** (9%), but nearly as many say that they do not have a preference (32%). There is a similar pattern in the case of preferences regarding freshwater or sea products. Those who express a preference are much more likely to opt for **sea products** (42%) than **freshwater products** (8%), but a third (33%) still have no preference. Most respondents prefer fishery and aquaculture products **from their own country or region**, although nearly a quarter (24%) do not mind where the products come from.

Respondents quite often **get their information** about FAPs from the store employee or fishmonger (44%). The media (32%) is the second most often mentioned source of information, slightly ahead of family and friends (30%), while a quarter of respondents get their information from the Internet. In almost all countries these four sources of information are the most common, but there is a clear age divide: older respondents are more likely to get their information from the point of sale and traditional media, while younger respondents are more likely to get information from the Internet.

As for the information accompanying fishery and aquaculture products, a vast majority of respondents find it clear and easy to understand.

The “use by” or “best before” dates, the name of the product and the species and whether the product was previously frozen are seen as the most important **mandatory elements that appear on labels** of FAPs. Significantly fewer respondents think that it is important that information about the fishing gear used to catch the product should appear on labels. For tinned and prepared products, respondents are most likely to consider the indication of the origin of the product used, followed by the species, and whether the product is wild or farmed to be important.

As for **voluntary information**, respondents are more likely to say the date of catch or production should be on labels, rather than ethical or social information or information about the fisherman and country of registration of the ship that landed these products.

Finally, there is widespread **trust** in the information that accompanies fishery and aquaculture products, particularly in the information that must be shown by law or regulation.

TECHNICAL SPECIFICATIONS

Between the 23rd of June and 6th of July, Kantar Public carried out the wave 89.3 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Media Monitoring, Media Analysis and Eurobarometer” Unit.

The wave 89.3 covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	Kantar Belgium (Kantar TNS)	1,055	23/06/2018	04/07/2018	9,693,779	2.25%
BG	Bulgaria	Kantar TNS BBSS	1,031	23/06/2018	02/07/2018	6,537,535	1.52%
CZ	Czechia	Kantar CZ	1,023	23/06/2018	03/07/2018	9,238,431	2.14%
DK	Denmark	Kantar Gallup	1,020	23/06/2018	06/07/2018	4,838,729	1.12%
DE	Germany	Kantar Deutschland	1,550	23/06/2018	04/07/2018	70,160,634	16.26%
EE	Estonia	Kantar Emor	1,004	23/06/2018	06/07/2018	1,160,064	0.27%
IE	Ireland	Behaviour & Attitudes	1,011	23/06/2018	04/07/2018	3,592,162	0.83%
EL	Greece	Taylor Nelson Sofres Market Research	1,016	23/06/2018	04/07/2018	9,937,810	2.30%
ES	Spain	TNS Investigación de Mercados y Opinión	1,035	23/06/2018	02/07/2018	39,445,245	9.14%
FR	France	Kantar Public France	1,006	23/06/2018	06/07/2018	54,097,255	12.54%
HR	Croatia	Hendal	1,031	23/06/2018	06/07/2018	3,796,476	0.88%
IT	Italy	Kantar Italia	1,025	23/06/2018	02/07/2018	52,334,536	12.13%
CY	Rep. Of Cyprus	CYMAR Market Research	503	23/06/2018	03/07/2018	741,308	0.17%
LV	Latvia	Kantar TNS Latvia	1,007	25/06/2018	04/07/2018	1,707,082	0.40%
LT	Lithuania	TNS LT	1,015	25/06/2018	04/07/2018	2,513,384	0.58%
LU	Luxembourg	ILReS	508	25/06/2018	04/07/2018	457,127	0.11%
HU	Hungary	Kantar Hoffmann	1,064	23/06/2018	03/07/2018	8,781,161	2.04%
MT	Malta	MISCO International	502	23/06/2018	06/07/2018	364,171	0.08%
NL	Netherlands	TNS NIPO	1,006	23/06/2018	04/07/2018	13,979,215	3.24%
AT	Austria	Das Österreichische Gallup Institut	1,044	23/06/2018	04/07/2018	7,554,711	1.75%
PL	Poland	Kantar Polska	1,033	23/06/2018	04/07/2018	33,444,171	7.75%
PT	Portugal	Marktest – Marketing, Organização e Formação	1,082	23/06/2018	03/07/2018	8,480,126	1.97%
RO	Romania	Centrul Pentru Studierea Opiniei si Pietei (CSOP)	1,021	23/06/2018	04/07/2018	16,852,701	3.91%
SI	Slovenia	Mediana DOO	1,015	23/06/2018	03/07/2018	1,760,032	0.41%
SK	Slovakia	Kantar Slovakia	1,071	23/06/2018	03/07/2018	4,586,024	1.06%
FI	Finland	Kantar TNS Oy	1,017	23/06/2018	06/07/2018	4,747,810	1.10%
SE	Sweden	Kantar Sifo	996	23/06/2018	06/07/2018	7,998,763	1.85%
UK	United Kingdom	Kantar UK Limited	1,043	23/06/2018	04/07/2018	52,651,777	12.20%
	TOTAL EU28		27,734	23/06/2018	06/07/2018	431,452,219	100%*

For the purpose of this report, we treat differences between this study and the one conducted in EB85.3 (2015) as significant when results differ by more than five percentage points.

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas.

In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview)* was used in those countries where this technique was available.

For each country, a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), Kantar Public applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed here.

Readers are reminded that survey results are <u>estimations</u>, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

<u>Statistical Margins due to the sampling process</u>

(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6.0	8.3	9.9	11.1	12.0	12.7	13.2	13.6	13.8	13.9	N=50
N=500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4	N=500
N=1000	**1.4**	**1.9**	**2.2**	**2.5**	**2.7**	**2.8**	**3.0**	**3.0**	**3.1**	**3.1**	**N=1000**
N=1500	1.1	1.5	1.8	2.0	2.2	2.3	2.4	2.5	2.5	2.5	N=1500
N=2000	1.0	1.3	1.6	1.8	1.9	2.0	2.1	2.1	2.2	2.2	N=2000
N=3000	0.8	1.1	1.3	1.4	1.5	1.6	1.7	1.8	1.8	1.8	N=3000
N=4000	0.7	0.9	1.1	1.2	1.3	1.4	1.5	1.5	1.5	1.5	N=4000
N=5000	0.6	0.8	1.0	1.1	1.2	1.3	1.3	1.4	1.4	1.4	N=5000
N=6000	0.6	0.8	0.9	1.0	1.1	1.2	1.2	1.2	1.3	1.3	N=6000
N=7000	0.5	0.7	0.8	0.9	1.0	1.1	1.1	1.1	1.2	1.2	N=7000
N=7500	0.5	0.7	0.8	0.9	1.0	1.0	1.1	1.1	1.1	1.1	N=7500
N=8000	0.5	0.7	0.8	0.9	0.9	1.0	1.0	1.1	1.1	1.1	N=8000
N=9000	0.5	0.6	0.7	0.8	0.9	0.9	1.0	1.0	1.0	1.0	N=9000
N=10000	0.4	0.6	0.7	0.8	0.8	0.9	0.9	1.0	1.0	1.0	N=10000
N=11000	0.4	0.6	0.7	0.7	0.8	0.9	0.9	0.9	0.9	0.9	N=11000
N=12000	0.4	0.5	0.6	0.7	0.8	0.8	0.9	0.9	0.9	0.9	N=12000
N=13000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.9	0.9	N=13000
N=14000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.8	0.8	N=14000
N=15000	0.3	0.5	0.6	0.6	0.7	0.7	0.8	0.8	0.8	0.8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	