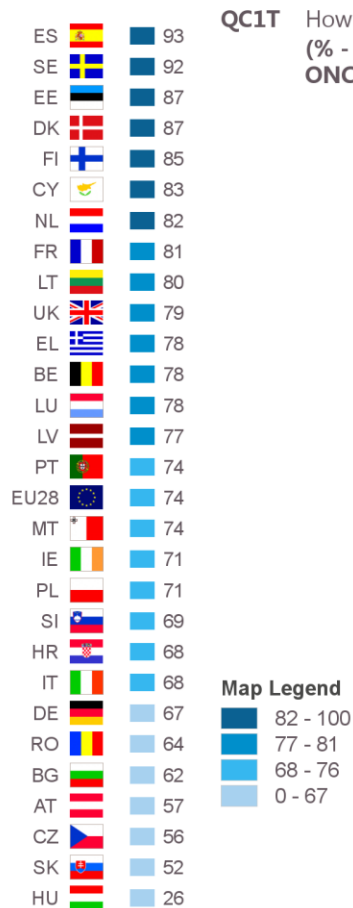


EU consumer habits regarding fishery and aquaculture products

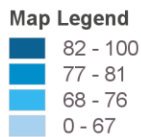
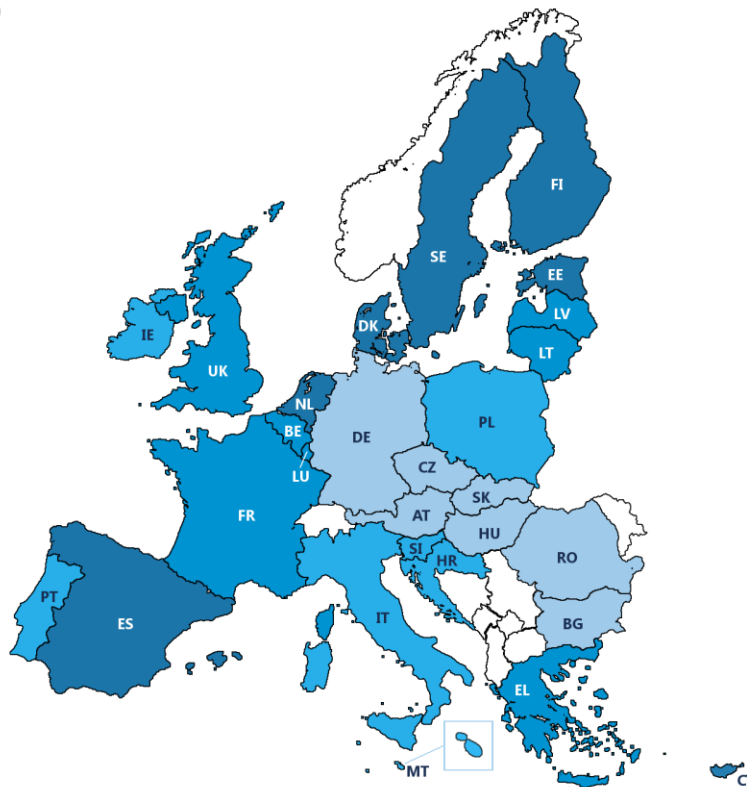
METHODOLOGY

- *Survey conducted face-to-face at respondents' home*
- *Fieldwork: June 4th to 13th 2016*
- *Population: Population 15+*
- *Coverage: 28 EU Member States*
- *Number of interviews: 27,818*

Respondents in land-locked countries are less likely to eat FAPs at least once a month than those in countries with coastlines



QC1T How frequently do you...
(% - EAT FISHERY OR AQUACULTURE PRODUCTS AT LEAST ONCE A MONTH)



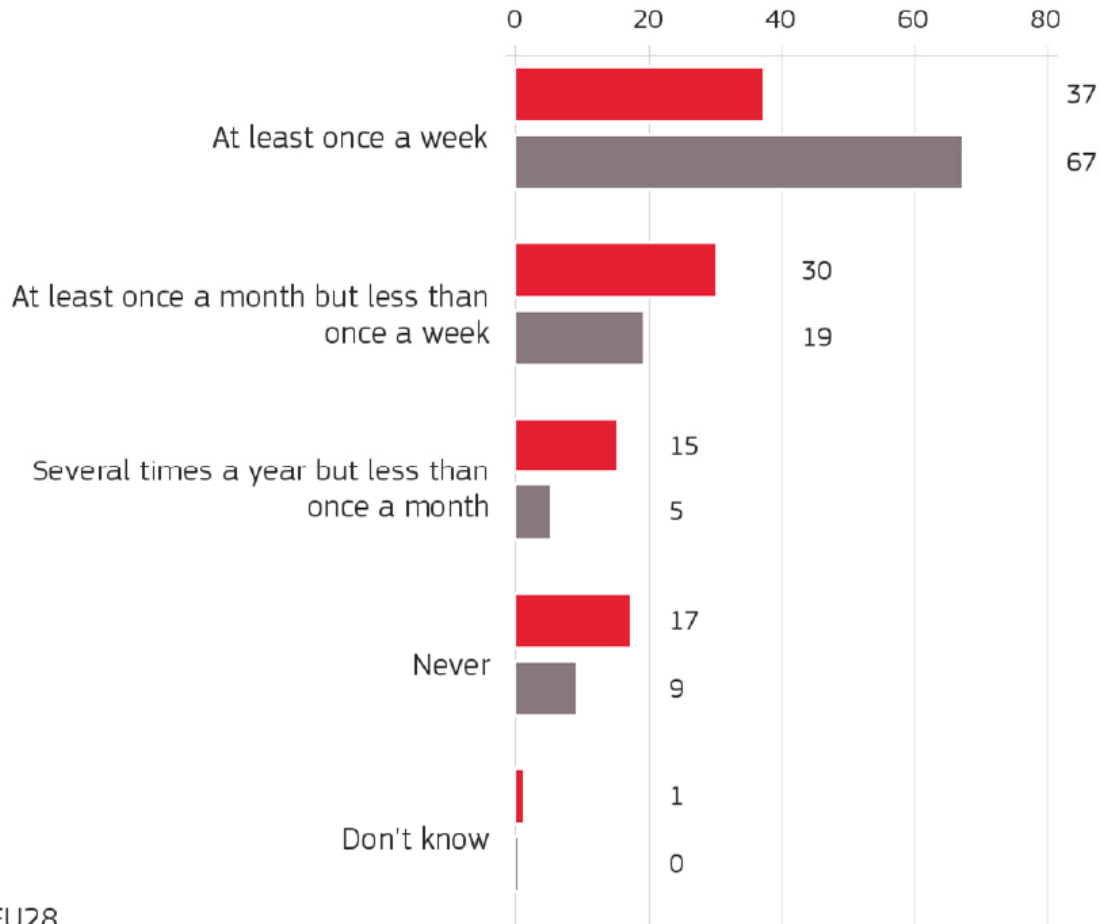
	EU28	ES
	74	93
Age		
15-24	67	86
25-39	70	91
40-54	75	94
55+	77	95

Base: all respondents (n=27.818)

FAP purchase

QC1.3 How frequently do you...

Buy fishery or aquaculture products (%)

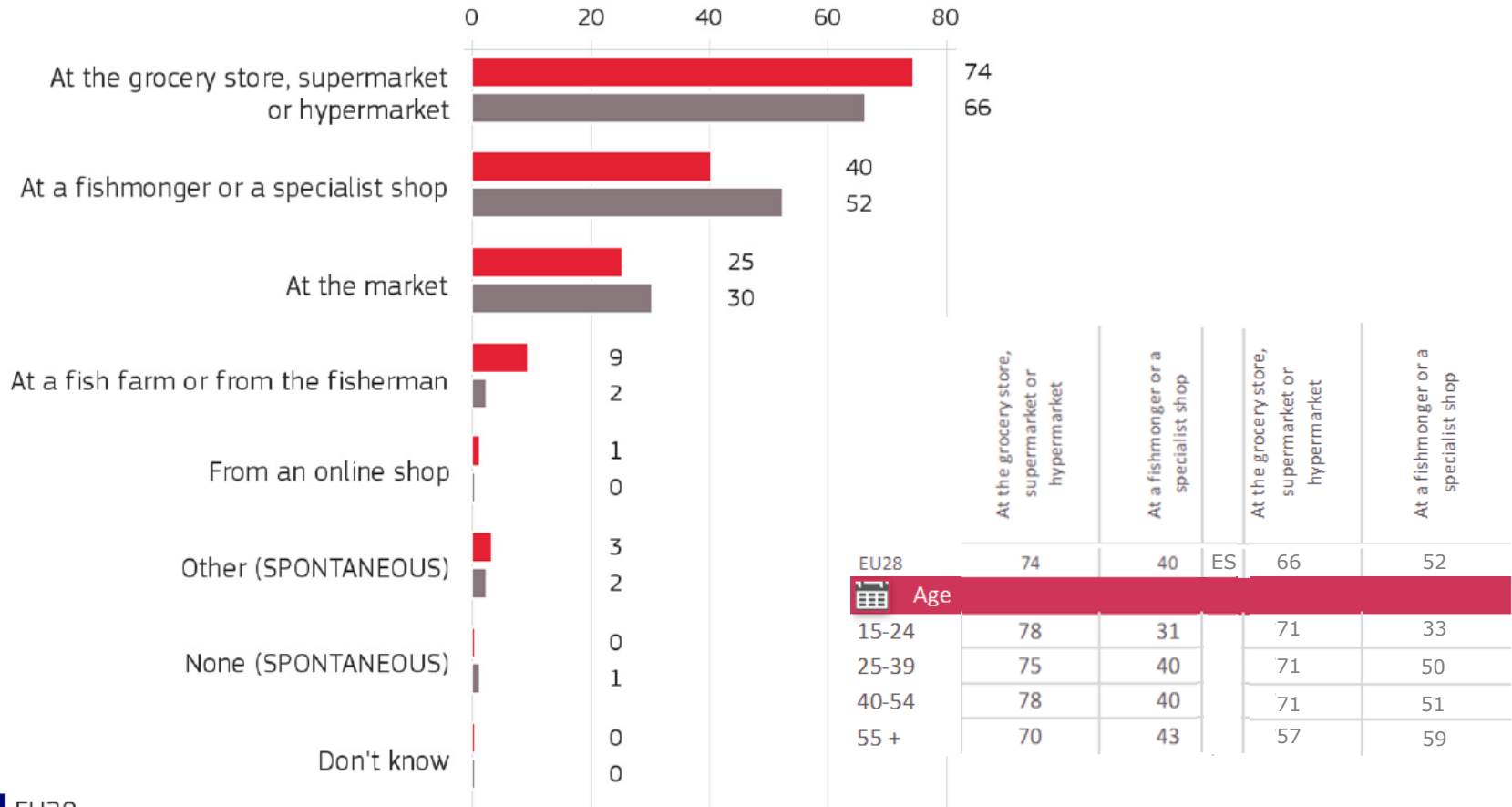


Base: all respondents (n=27.818)



Where do people buy? Mostly at supermarkets (74%)

QC3 Where do you buy your fishery or aquaculture products?
(MULTIPLE ANSWERS POSSIBLE)
(%)

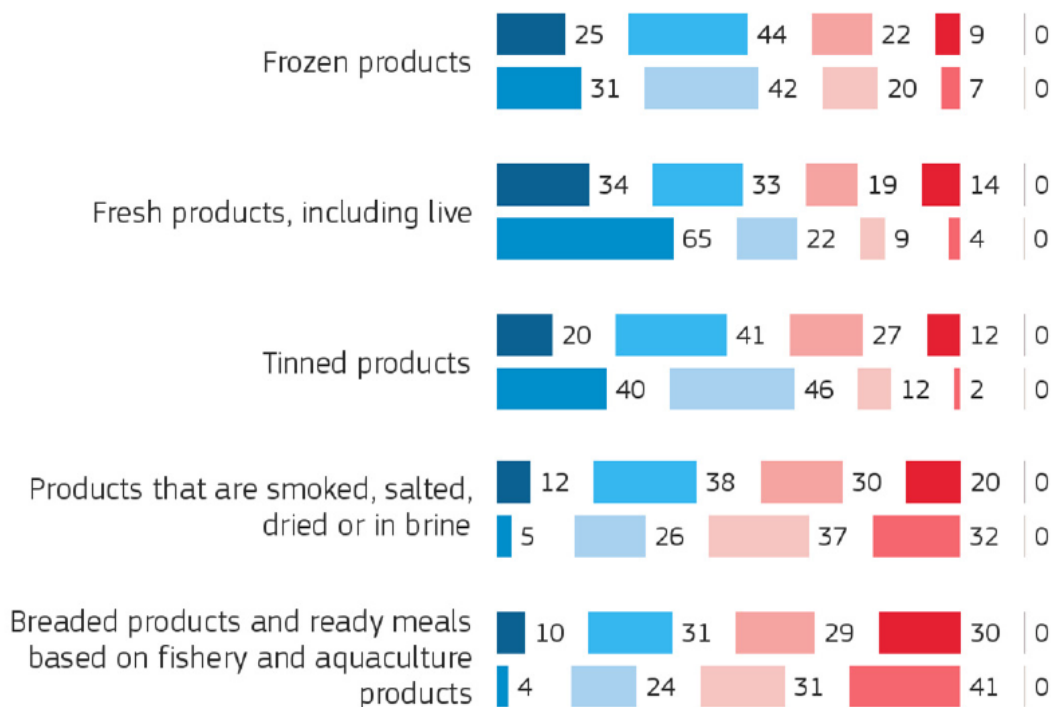


	At the grocery store, supermarket or hypermarket	At a fishmonger or a specialist shop	At the grocery store, supermarket or hypermarket	At a fishmonger or a specialist shop
EU28	74	40	66	52
Age				
15-24	78	31	71	33
25-39	75	40	71	50
40-54	78	40	71	51
55 +	70	43	57	59

What do people mostly buy

QC4a How frequently would you say you buy each of the following types of fishery and aquaculture products?

(%)



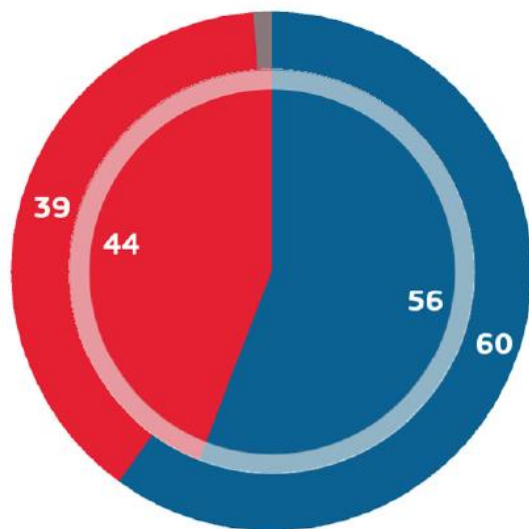
Trend: fresh and convenience / ready-to-eat products

Base: respondents who buy fishery or aquaculture products (N=22,759)

Openness to trying new products and species (60%)

QC16.1 Do you agree or disagree with the following statements regarding fishery and aquaculture products?

You like to try new products and species (%)



- Total 'Agree'
- Total 'Disagree'
- Don't know

EU28  Outer pie

ES  Inner pie

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

Agree:

68% (69% in ES)

aged 25-39

66% (also in ES)

finished education aged 20+

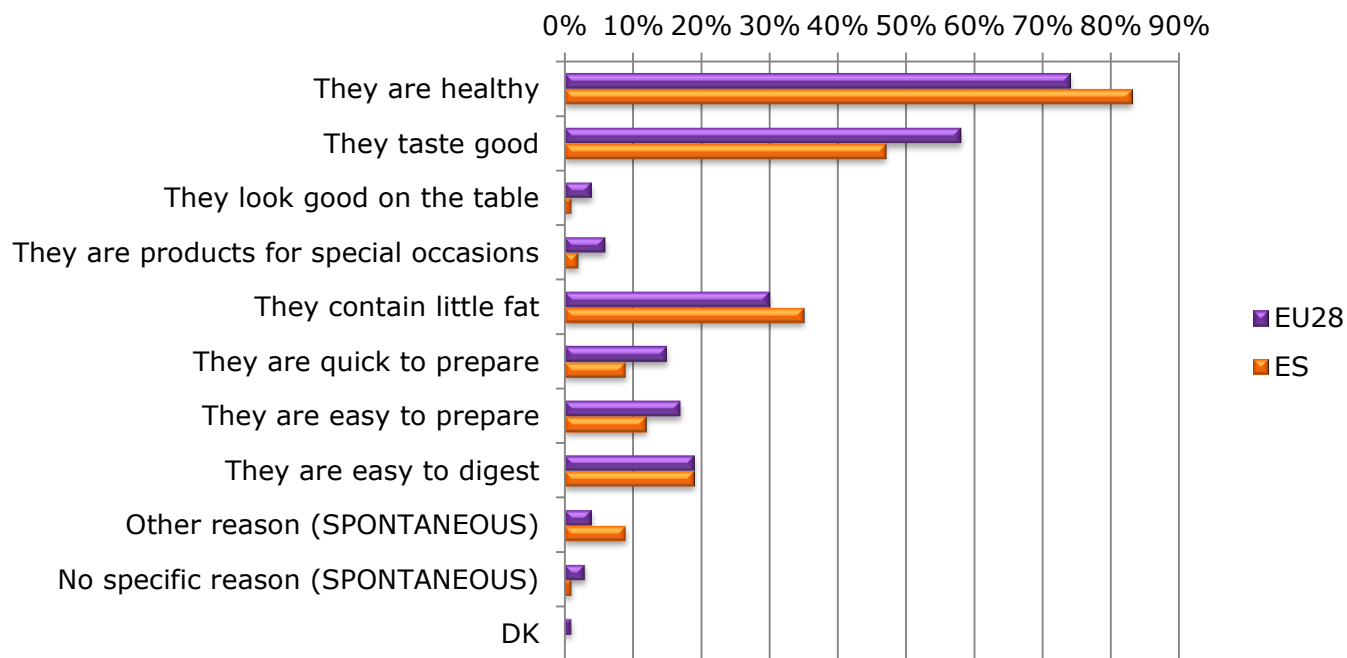
68-69%

managers and self-employed (in ES: 79% of managers)



European Commission

Consumers know that FAPs are healthy



Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

Would you buy more if...?

YOU WOULD BUY OR EAT MORE FISHERY AND AQUACULTURE PRODUCTS IF THE PRICE WAS NOT SO HIGH



Total
'Agree'

Total
'Agree'

EU28		68
BG		86
LT		84
PT		83
HR		82
IT		82
ES		79

EU28		68
AT		54
LU		51
SE		51
NL		49
DE		42

TOP

BOTTOM

YOU WOULD BUY OR EAT MORE FISHERY AND AQUACULTURE PRODUCTS IF THE CHOICE AND THE POINTS OF SALE WERE MORE DIVERSIFIED



Total
'Agree'

Total
'Agree'

EU28		51
MT		68
RO		68
CY		67
BG		67
LT		66
IE		66
ES		62

EU28		51
FI		45
BE		44
LU		44
AT		41
DE		29
NL		29

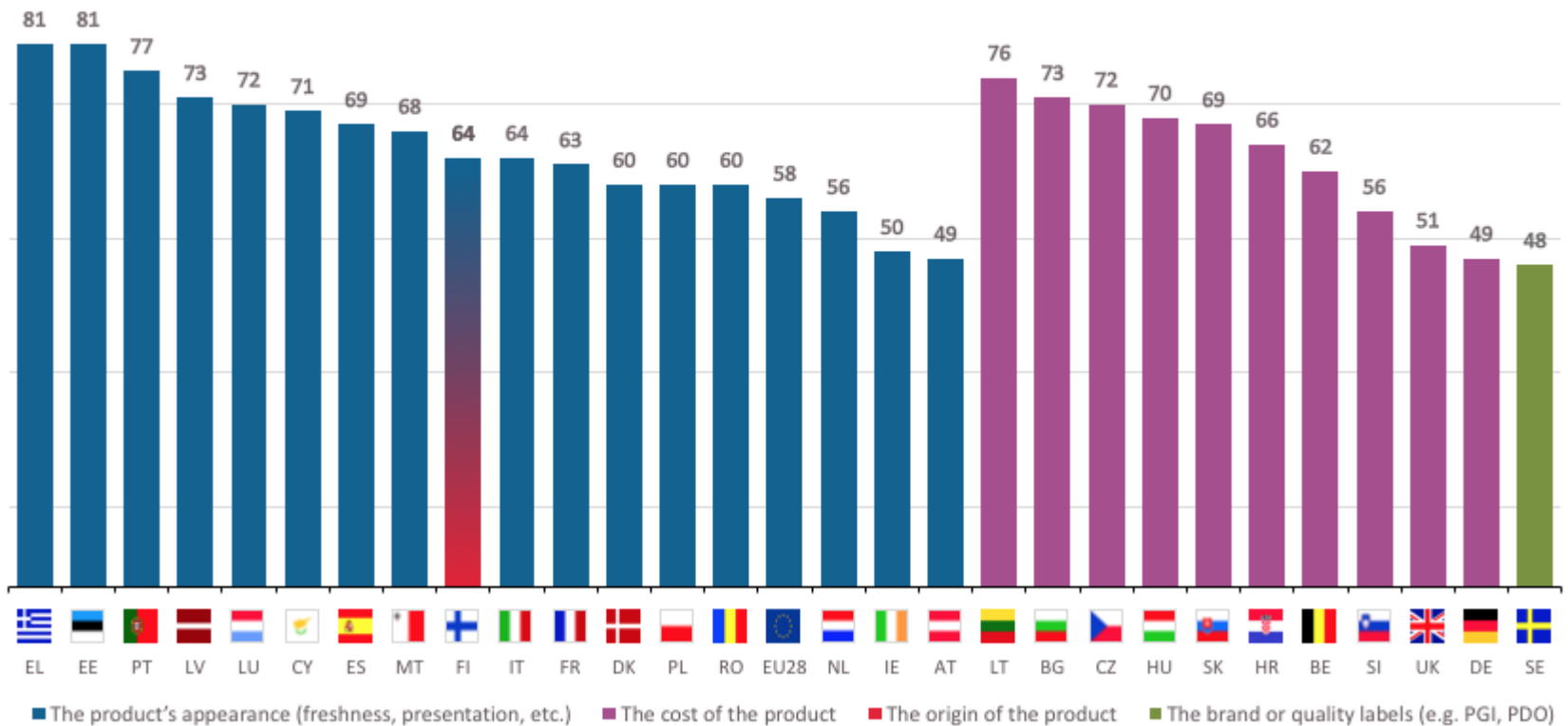
TOP

BOTTOM

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

What are the main purchasing factors?

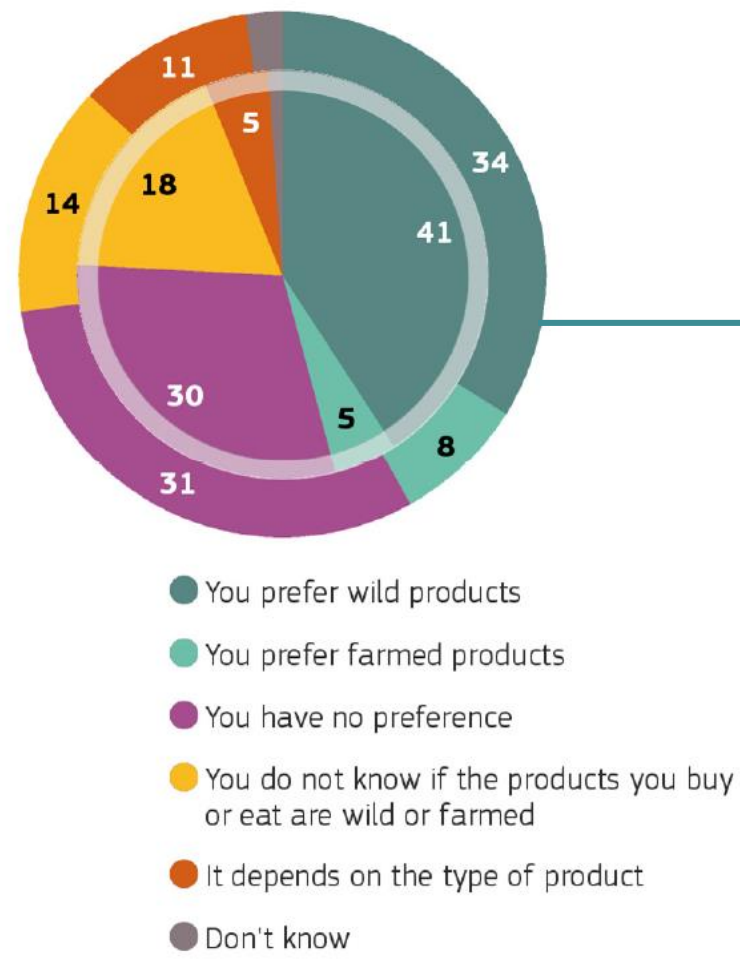
QC9 When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: respondents who buy fishery or aquaculture products (N=22,759)

A relative majority of consumers prefer wild products (34%) to farmed products (8%), while 31% have no preference

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



39%
aged 55+ (45-46%
aged 40+ in ES)

56% (58% in ES)
prefer sea products

49% (61% in ES)
prefer products from
own region

Lead answer in **16**
countries

EU28 Outer pie ES Inner pie

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)



QC7

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

(%)

		Products from your region	Products from your country	Products from the EU	Products from outside the EU
EU28		29	37	14	3
BE		23	31	29	6
BG		25	28	10	1
CZ		19	25	9	2
DK		26	43	18	3
DE		30	30	23	5
EE		27	38	13	2
IE		36	46	14	3
EL		53	76	12	1
ES		33	45	6	1
FR		41	46	14	2
HR		37	57	7	2
IT		35	43	12	3
CY		25	61	14	1
LV		29	35	10	2
LT		14	23	10	2
LU		20	26	42	4
HU		16	26	9	4
MT		27	57	26	1
NL		14	20	15	2
AT		24	31	17	4
PL		18	31	11	5
PT		19	53	10	2
RO		21	47	17	8
SI		43	50	24	1
SK		14	20	14	6
FI		40	63	11	5
SE		42	47	15	3
UK		19	23	7	1

Highest percentage per country

Highest percentage per item

Local and EU is largely preferred

→ Quality schemes largely used by retailers (PDO, PGI, Label Rouge, local supply chains or traceability)

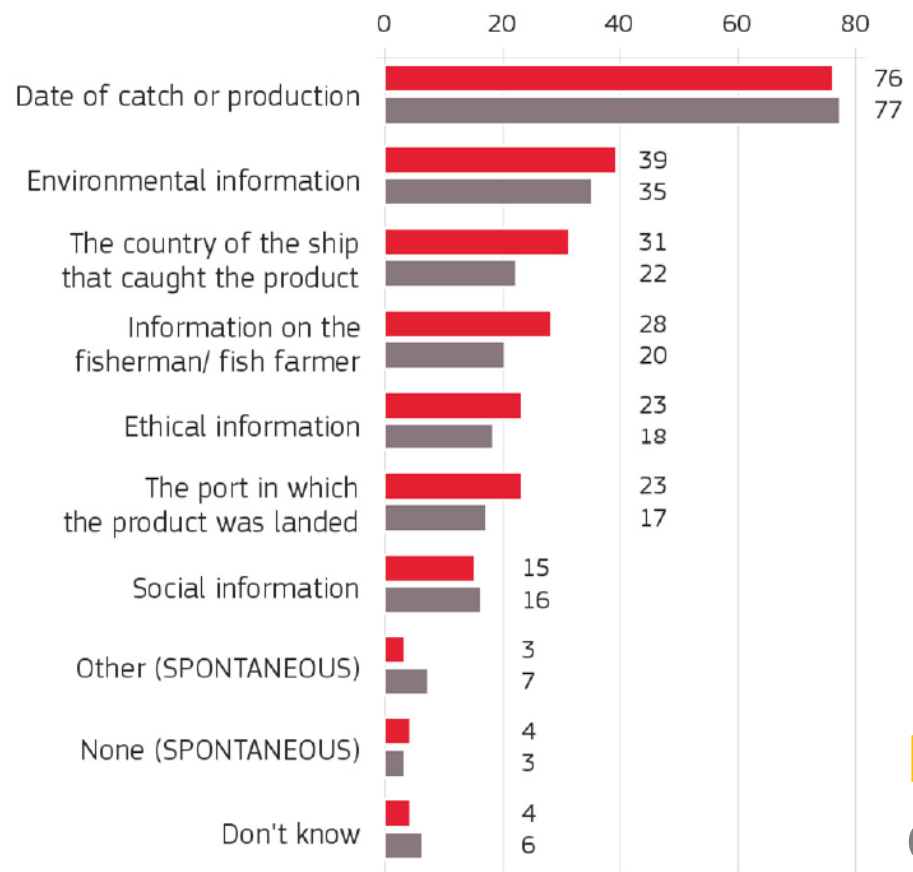
Base: respondents who buy fishery or aquaculture products (N=22,759)



Interest in voluntary information

QC14 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		Environmental information		Ethical information	
	EU	ES	EU	ES	EU	ES
Age	76	77	39	35	23	18
15-24	71	61	44	46	27	24
25-39	77	80	43	38	24	18
40-54	78	79	42	44	26	21
55+	76	77	33	24	19	15
Education (end of)						
15-	73	80	29	25	16	13
16-19	77	77	36	36	21	20
20+	79	78	47	45	29	20
Still studying	71	61	48	46	28	26

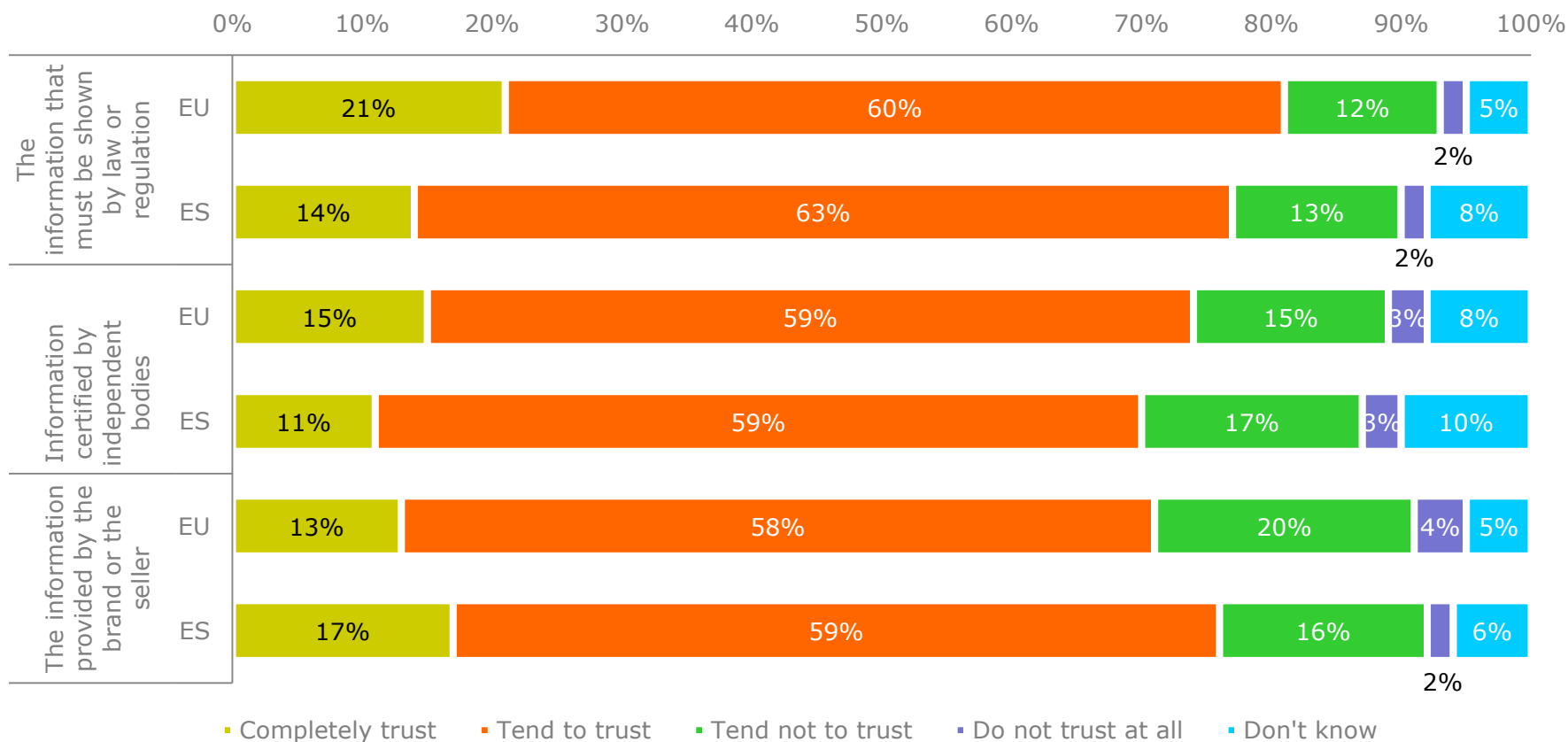
Eco-labels: large development over the last decade but no price premium

Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)



EU consumers trust all information accompanying FAPs, especially information that must be shown by law (81%)

QC10 To what extent do you trust or not the following information accompanying fish or aquaculture products?
(% - EU)



Base: respondents who buy and/or eat fishery or aquaculture products (N=24,452)

**Thank you for your
attention!**

<http://europa.eu/!mv96WH>