

**European Commission  
Directorate General for Health and Consumers**

Study on the application of rules on  
voluntary origin labelling of foods and on the  
mandatory indication of country of origin or place of  
provenance of meat used as an ingredient

**Annex D – consumer survey**

**Assessment B: Study on the application of rules on mandatory origin  
labelling of meat ingredients (MCOOL)**

Framework Contract for evaluation  
and evaluation related services - Lot 3: Food Chain

*Submitted by:*

***Food Chain Evaluation Consortium (FCEC)***

*Civic Consulting - Agra CEAS Consulting-*

*Arcadia International - Van Dijk Management Consultants*

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in collaboration with **Areté s.r.l.**

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**Study on the application of rules on  
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**Annex D – consumer survey**

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Prepared by the Food Chain Evaluation Consortium (FCEC)  
Civic Consulting – Agra CEAS Consulting –  
Van Dijk Management Consultants – Arcadia International –

Project Leader: Agra CEAS Consulting

**fcec**

Food Chain Evaluation Consortium



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## **Annex A: FCEC consumer survey**

### **Methodology:**

An online CAWI survey was undertaken in February 2013 in 15 EU MS. The sampling design adopted in the investigation on consumers takes into account the need to uniformly allocate the interviews conducted in 15 MS. To this end, 200 interviews in each of the 15 MS were conducted, which brings together a total of 3,000 consumer interviews. The selected MS account for 89% of the total EU population and adequately represent the main food consumption habits in the EU (missing MS were “covered” through the inclusion of at least one neighbouring MS with broadly similar habits). The main features of the survey design are illustrated in the table below.

Such allocation allowed to satisfy the need to analyse the results of each MS with a suitable level of precision.

Data analysis at individual MS level was supplemented with data analysis on all the respondents’ answers (15 MS in the sample combined). The analysis on all the respondents from the 15 MS was conducted following two different approaches:

- *Average total 15 countries* – This approach leads to aggregate results of the interviews in the 15 MS of interest; the aggregate variable *average total 15 countries* has to be understood as a simple arithmetic mean, useful to determine the deviation of the results of individual MS with reference to such average value; in this case, all individual MS contribute information in the same way.
- *Total 15 countries* – Differently from the above approach, results are obtained through the adoption of a system of weights in the data elaboration phase. The system of weights is devised in a way to replicate the real population composition of each MS in the sample. Through rebalancing of the uniform composition adopted in the sampling phase, the system creates an allocation of the number of interviews for each MS which is proportional to the dimension of the population of interest for the survey (18-70 years) in each MS. The system allows information collected in the most populated MS to weigh more than information collected in the less populated ones, and hence to obtain final results which correctly reflect the actual distribution of the population in the 15 MS surveyed. By applying such approach, the aggregate variable ‘*total 15 countries*’ represents the actual survey results for the 15 MS in the sample combined.

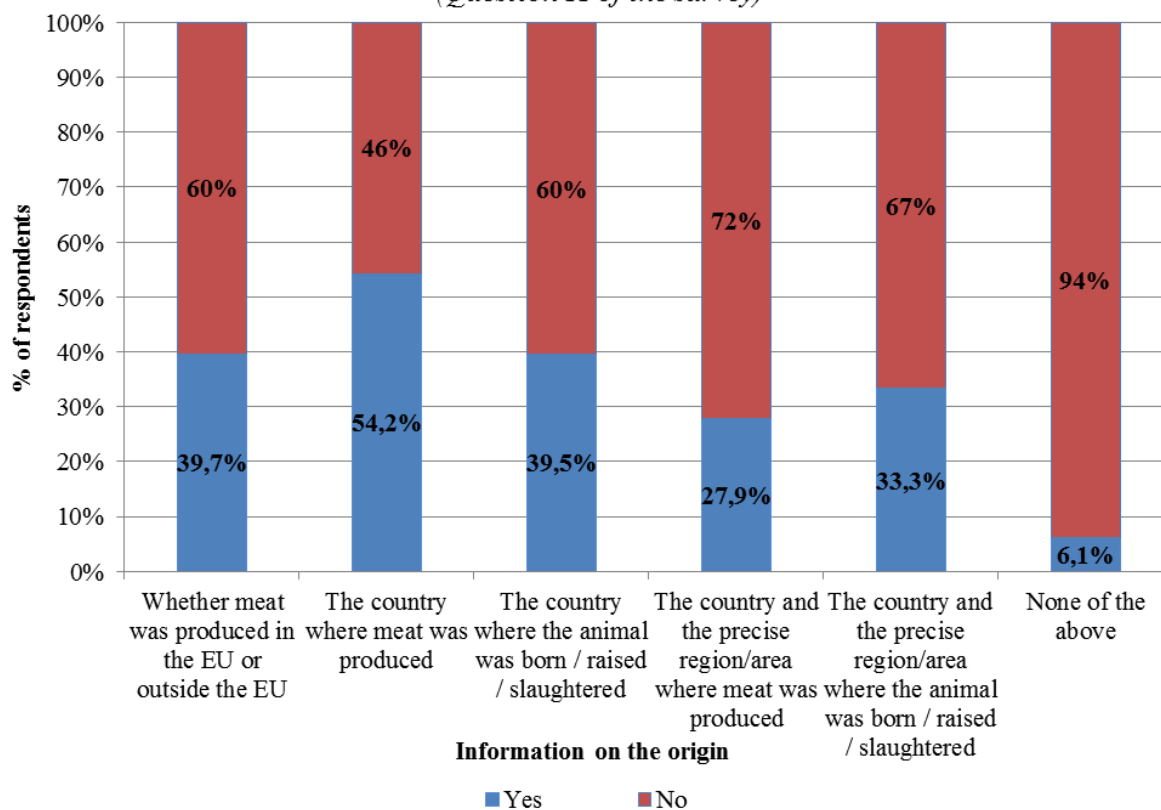
**Table 1: Sample design of the consumer survey**

EU 27 MS	Population (Mio)	Rank	Final sample of 15 MS			
			Rank	MS included	Population (MIO)	Sample size (units)
Germany	82.0	1	1	Germany	82.0	200
France	64.3	2	2	France	64.3	200
United Kingdom	61.7	3	3	United Kingdom	61.7	200
Italy	60.0	4	4	Italy	60.0	200
Spain	45.8	5	5	Spain	45.8	200
Poland	38.1	6	6	Poland	38.1	200
Romania	21.5	7	7	Romania	21.5	200
Netherlands	16.4	8				
Greece	11.2	9	8	Greece	11.2	200
Belgium	10.7	10	9	Belgium	10.7	200
Portugal	10.6	11				
Czech Republic	10.5	12	10	Czech Republic	10.5	200
Hungary	10.0	13	11	Hungary	10.0	200
Sweden	9.2	14	12	Sweden	9.2	200
Austria	8.3	15	13	Austria	8.3	200
Bulgaria	7.6	16	14	Bulgaria	7.6	200
Denmark	5.5	17				
Slovakia	5.4	18				
Finland	5.3	19				
Ireland	4.5	20				
Lithuania	3.3	21	15	Lithuania	3.3	200
Latvia	2.3	22				
Slovenia	2.0	23				
Estonia	1.3	24				
CYPRUS	0.8	25				
Luxembourg	0.5	26				
Malta	0.4	27				
<b>Total population</b>	<b>499</b>			<b>Total population</b>	<b>444</b>	<b>3,000</b>
<b>% of EU total population covered by the survey</b>					<b>89%</b>	

**Results of FCEC consumer survey – Assessment B**

**Figure 1: Information required on the origin of the meat contained in *uncooked sausages or burgers* (average data for 15 EU countries)**

*"When you purchase uncooked sausages or burgers, which of the following information regarding the origin of the meat do you find necessary to know?" (Question 11 of the survey)*



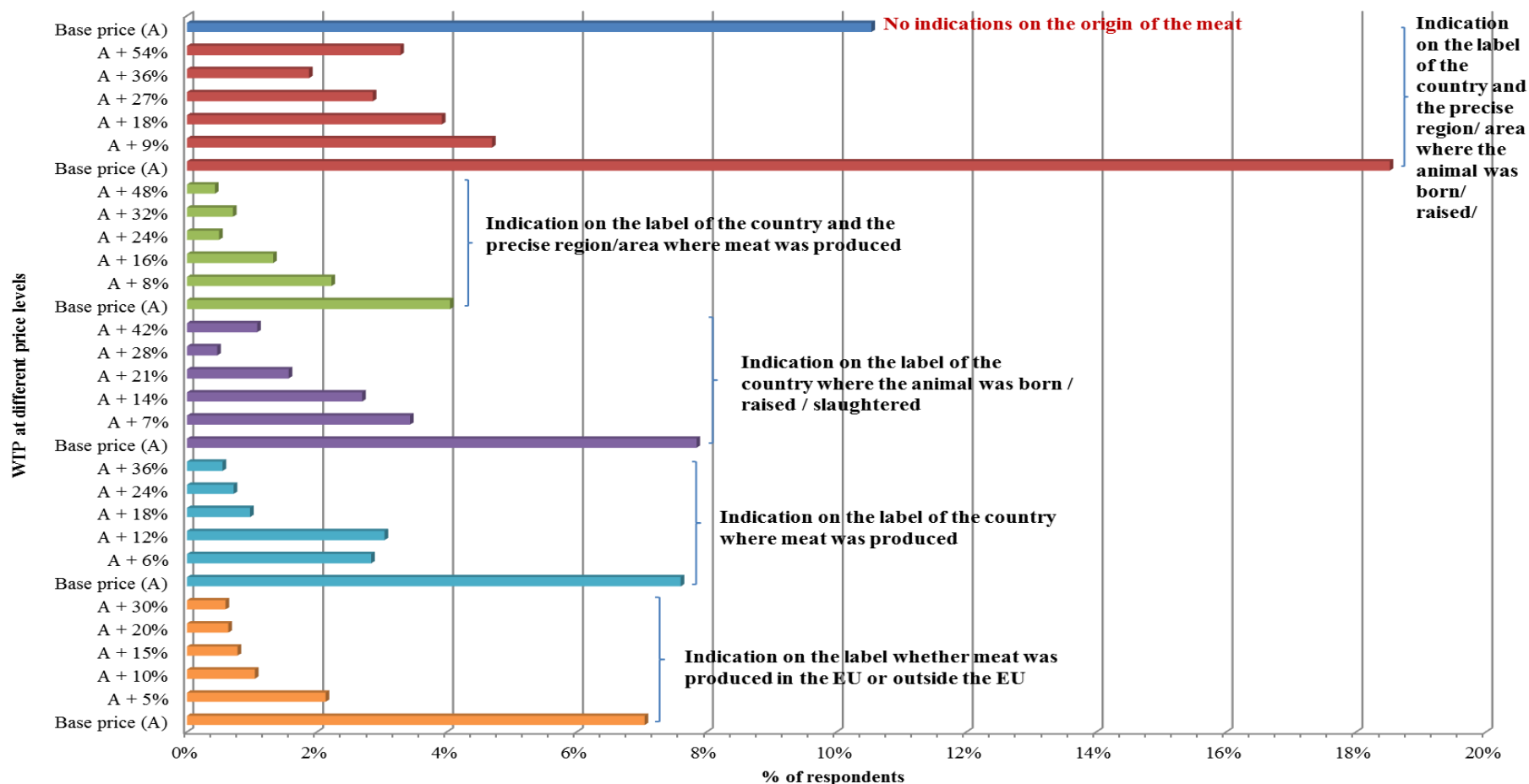
Note: percentages may not add up to 100% due to rounding



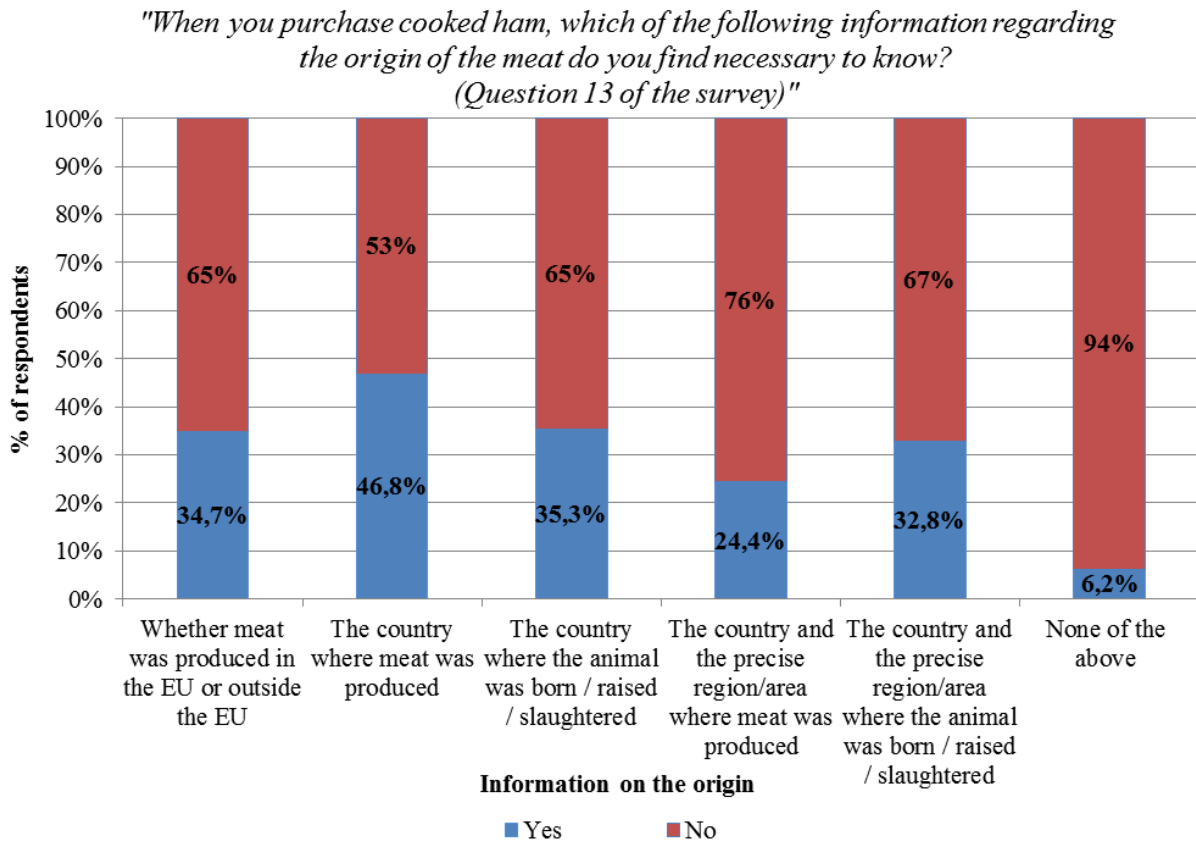
**Figure 2: Uncooked sausages or burgers: WTP for detailed information on the origin of meat (average data for 15 EU countries)**

Note: ONLY ONE product/price combination selected (sum of all bars = 100)

*“When purchasing uncooked sausages or burgers, how much more would you be willing to pay to have more detail on the ‘origin’ of the meat?” (Question 12 of the survey)*



**Figure 3: Information required on the origin of the meat contained in *cooked ham* (average data for 15 EU countries)**

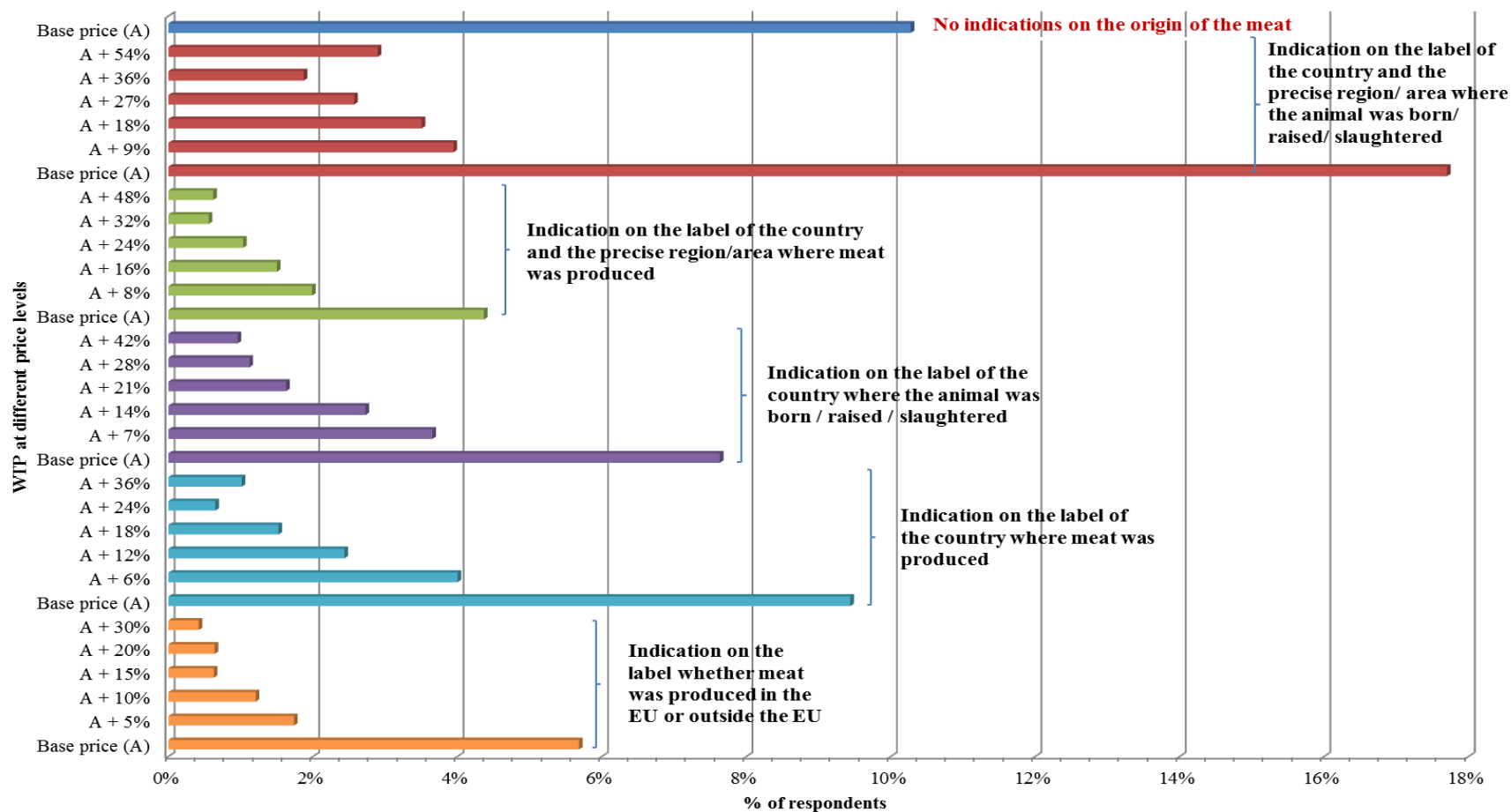


Note: percentages may not add up to 100% due to rounding

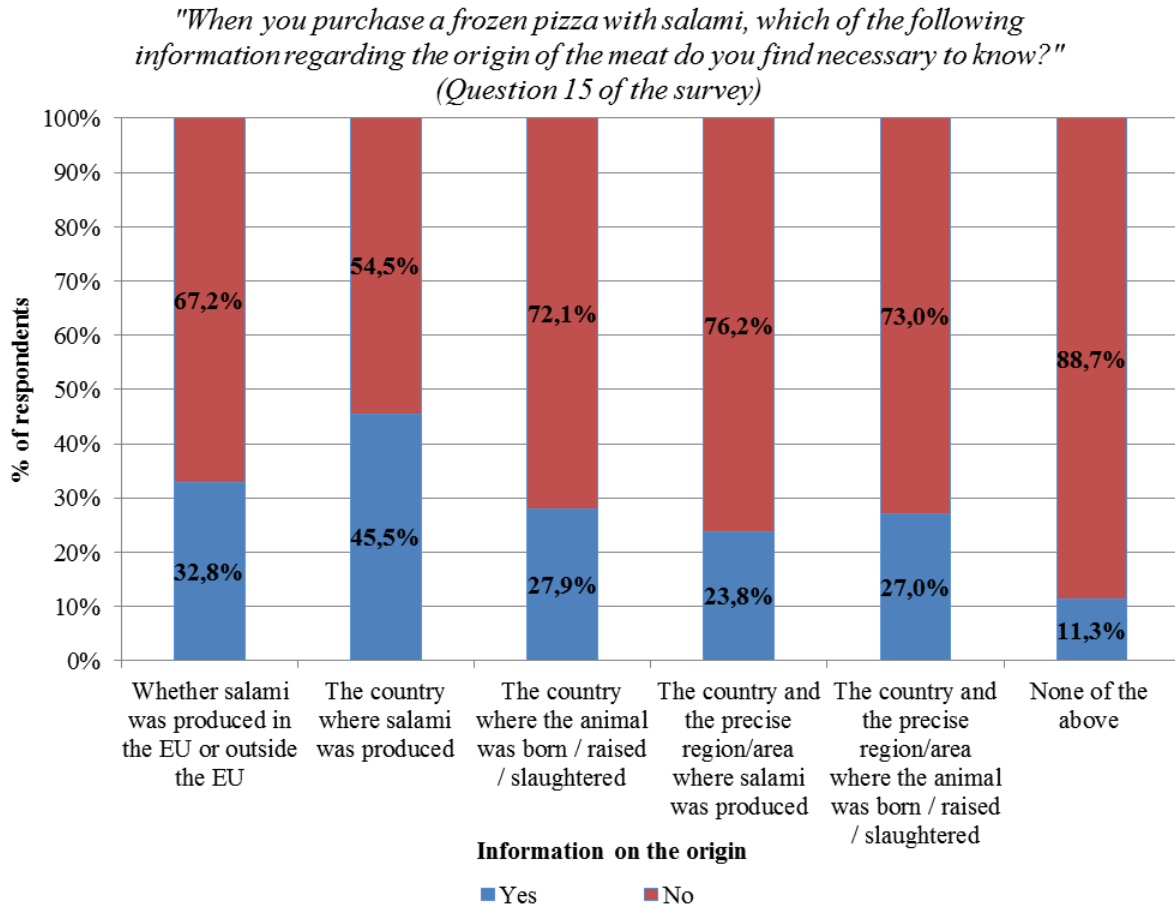
**Figure 4: Cooked ham : WTP for detailed information on the origin of meat (average data for 15 EU countries)**

Note: ONLY ONE product/price combination selected (sum of all bars = 100)

“When purchasing **cooked ham**, how much more would you be willing to pay to have more detail on the ‘origin’ of the meat?” (Question 14 of the survey)



**Figure 5: Information required on the origin of the meat contained in frozen pizza with salami (average data for 15 EU countries)**

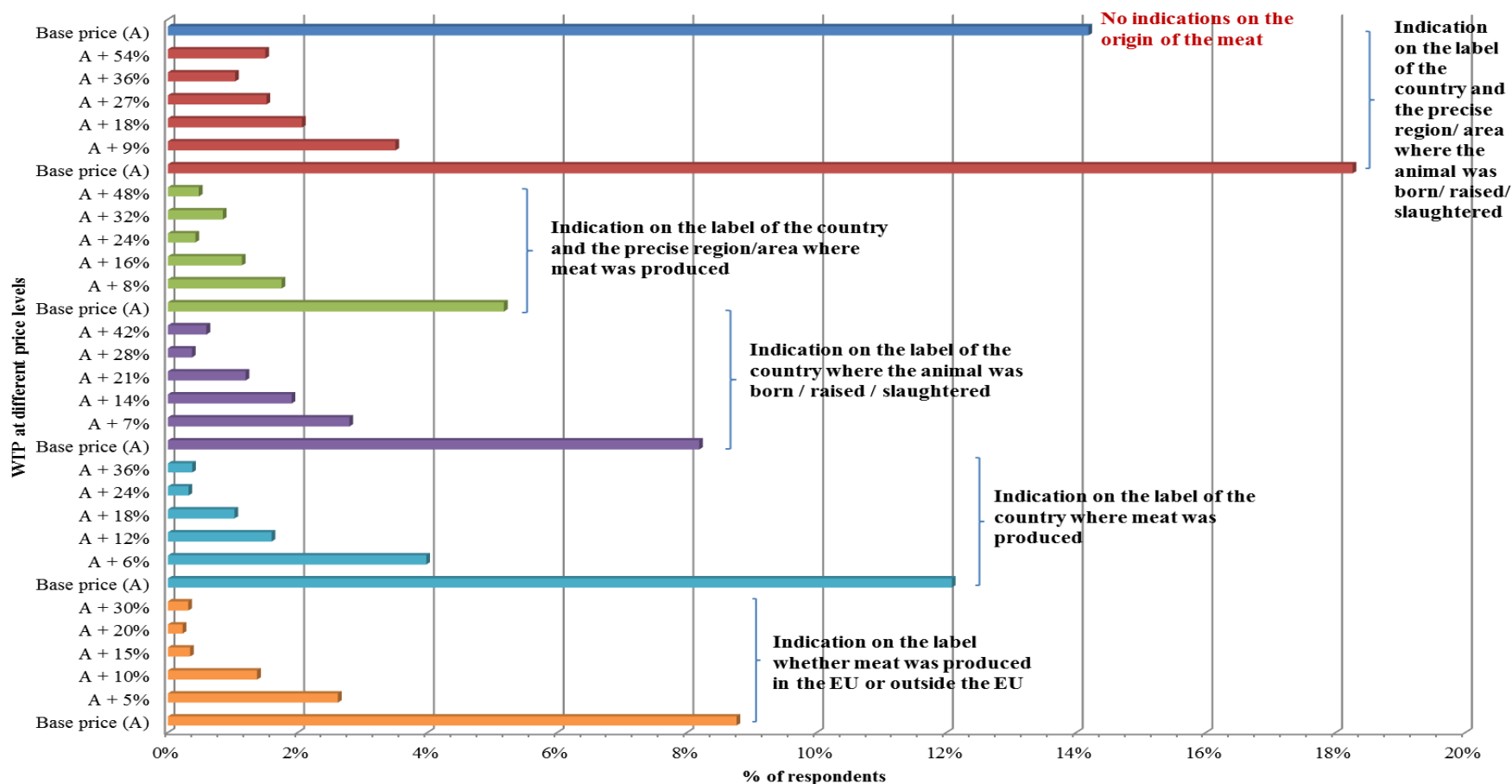


Note: percentages may not add up to 100% due to rounding

**Figure 6: Frozen pizza with salami : WTP for detailed information on the origin of meat (average data for 15 EU countries)**

Note: ONLY ONE product/price combination selected (sum of all bars = 100)

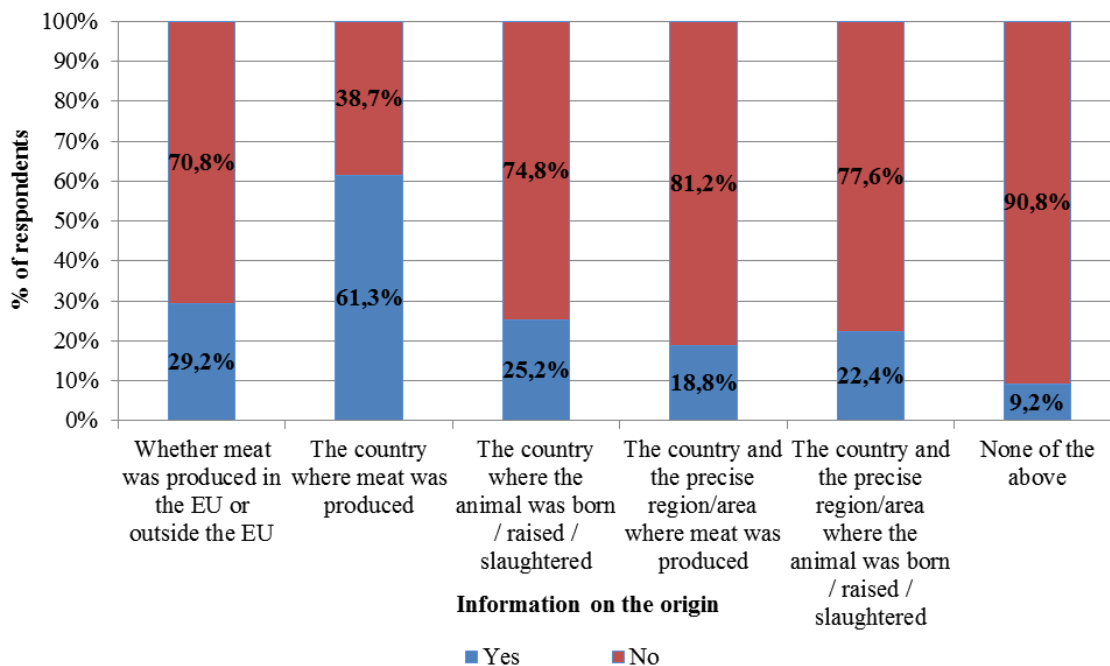
“When purchasing a frozen pizza with salami, how much more would you be willing to pay to have more detail on the ‘origin’ of the meat?” (Question 16 of the survey)



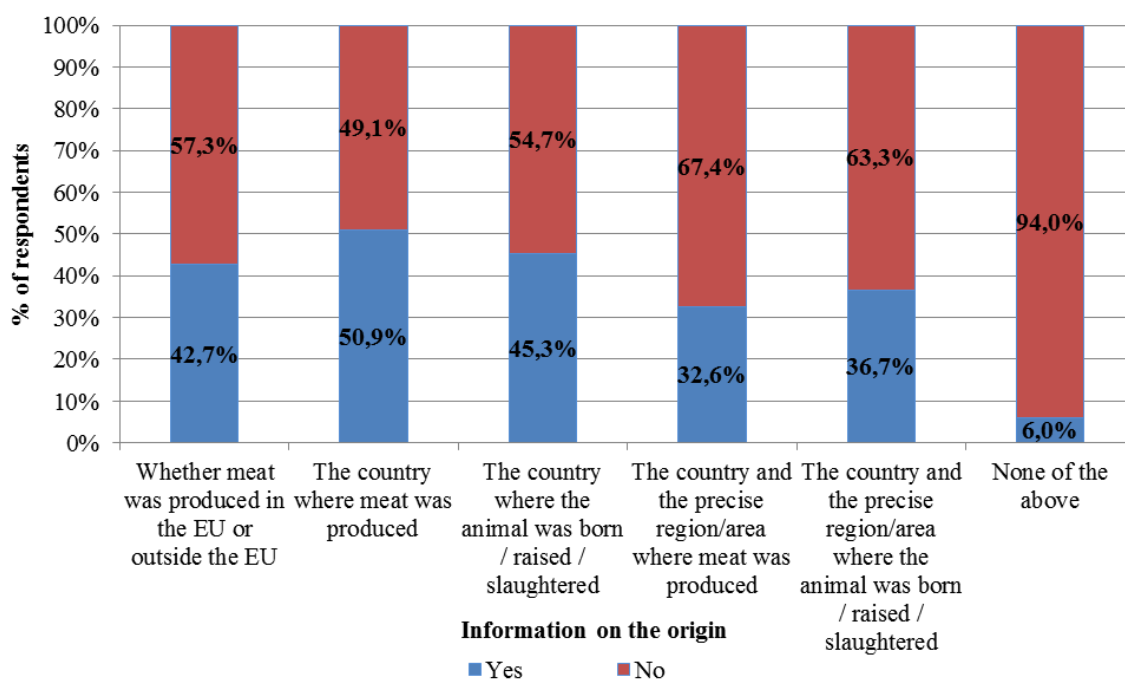
**Figure 7: Information required on the origin of the meat contained in *uncooked sausages or burgers*, by Member State**

“When you purchase *uncooked sausages or burgers*, which of the following information regarding the origin of the meat do you find necessary to know?” (Question 11 of the survey)

**Czech Republic**

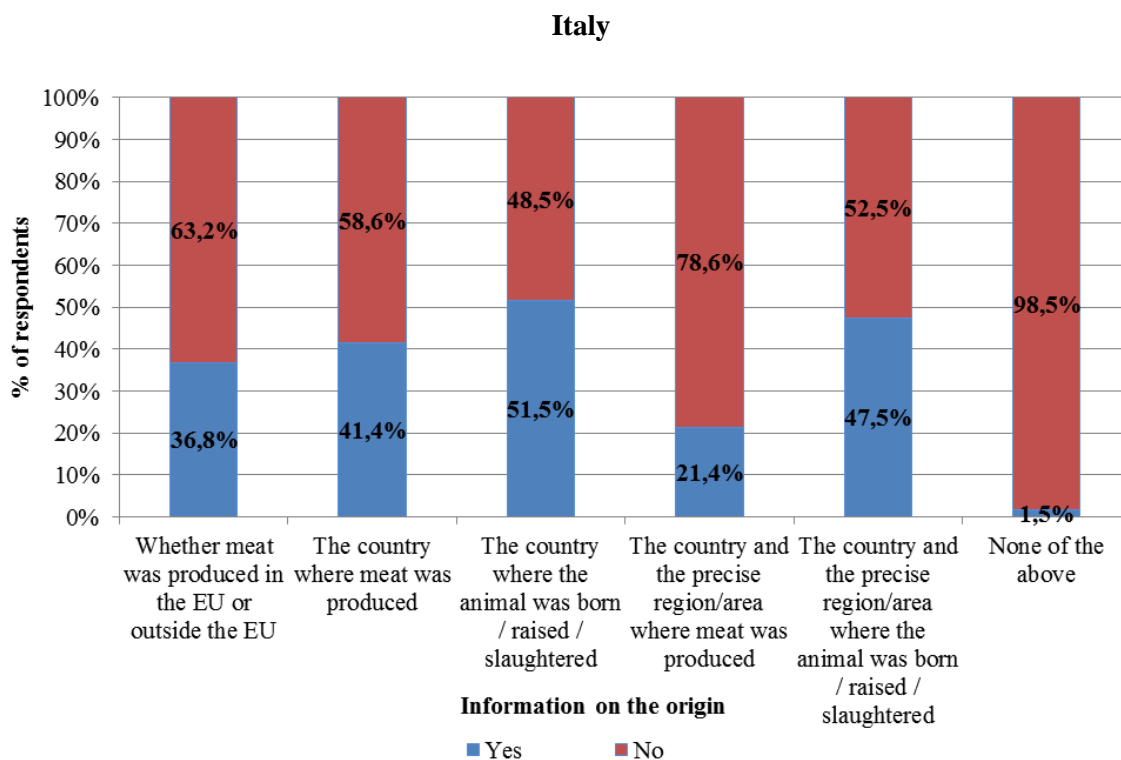
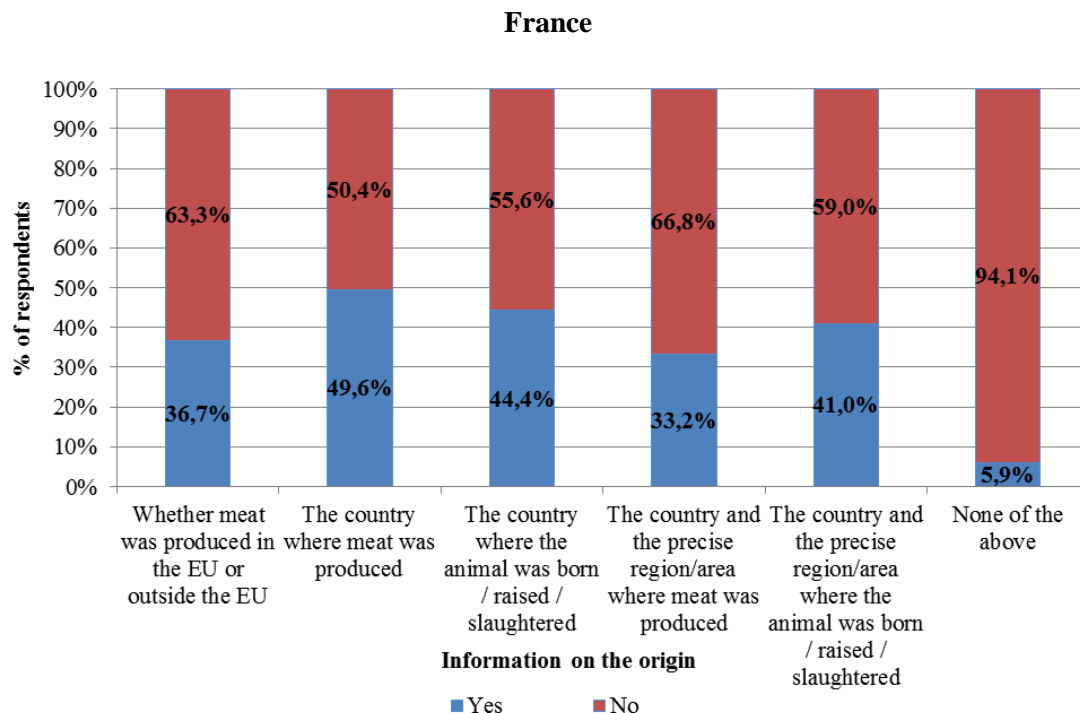


**Deutschland**



**Figure 7 (continued): Information required on the origin of the meat contained in uncooked sausages or burgers, by Member State**

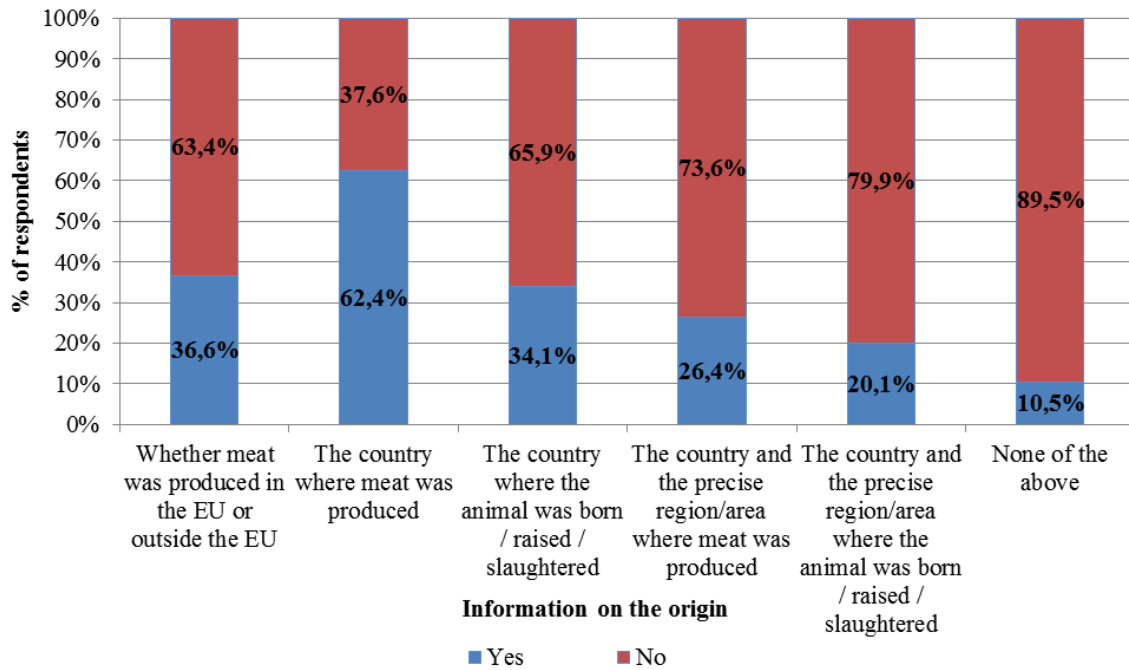
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**Figure 7 (continued): Information required on the origin of the meat contained in uncooked sausages or burgers, by Member State**

“When you purchase *uncooked sausages or burgers*, which of the following information regarding the origin of the meat do you find necessary to know?” (Question 11 of the survey)

**United Kingdom**

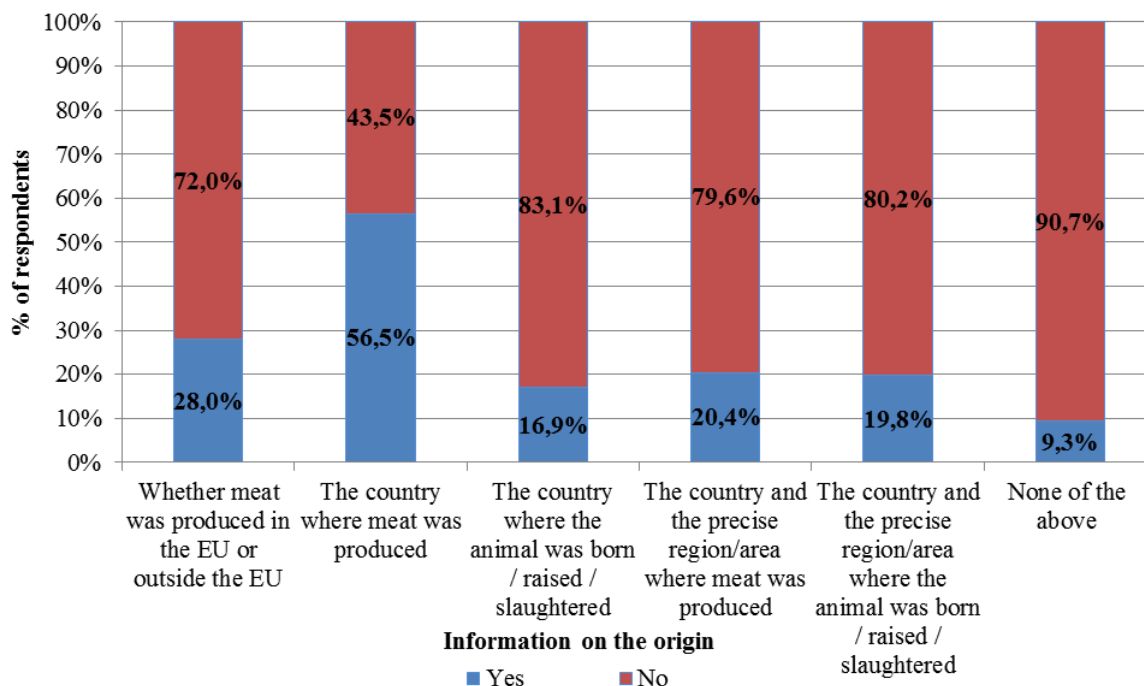




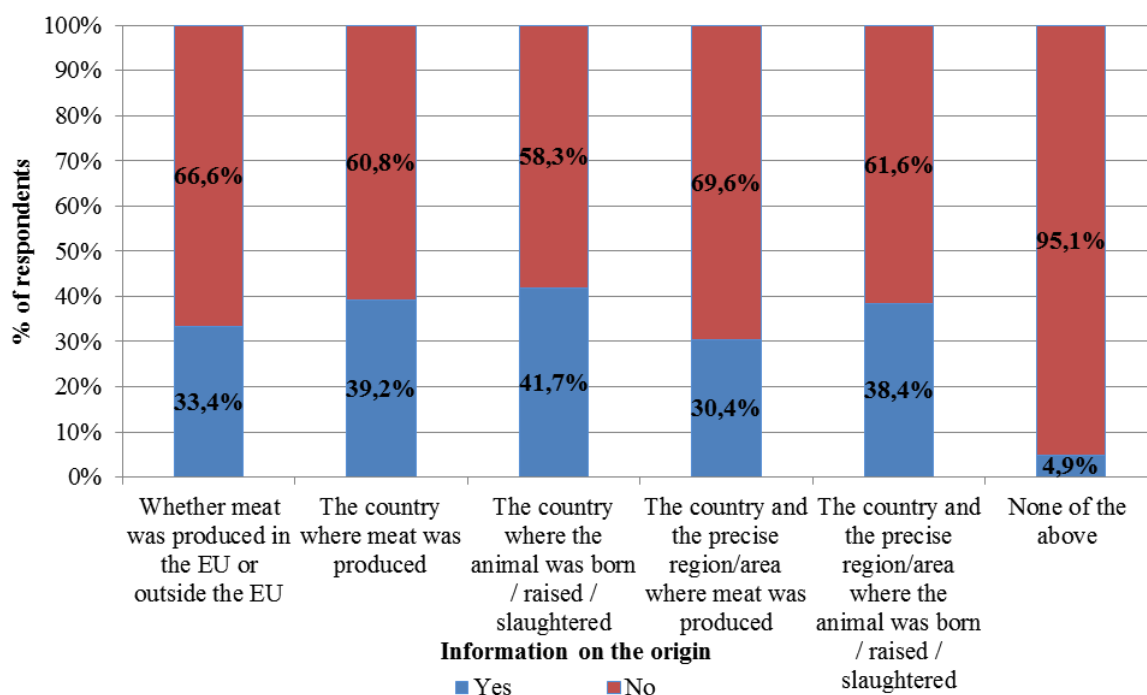
**Figure 8: Information required on the origin of the meat contained in *cooked ham*, by Member State**

*“When you purchase **cooked ham**, which of the following information regarding the origin of the meat do you find necessary to know?” (Question 13 of the survey)*

**Czech Republic**

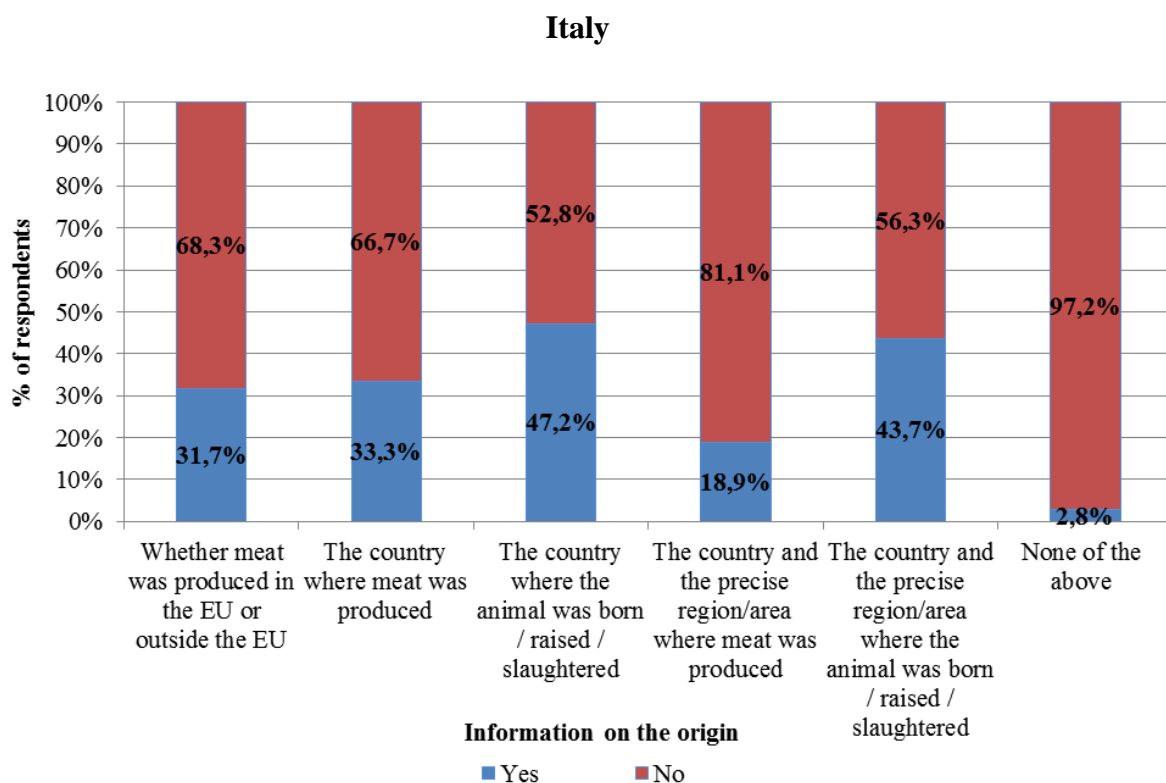
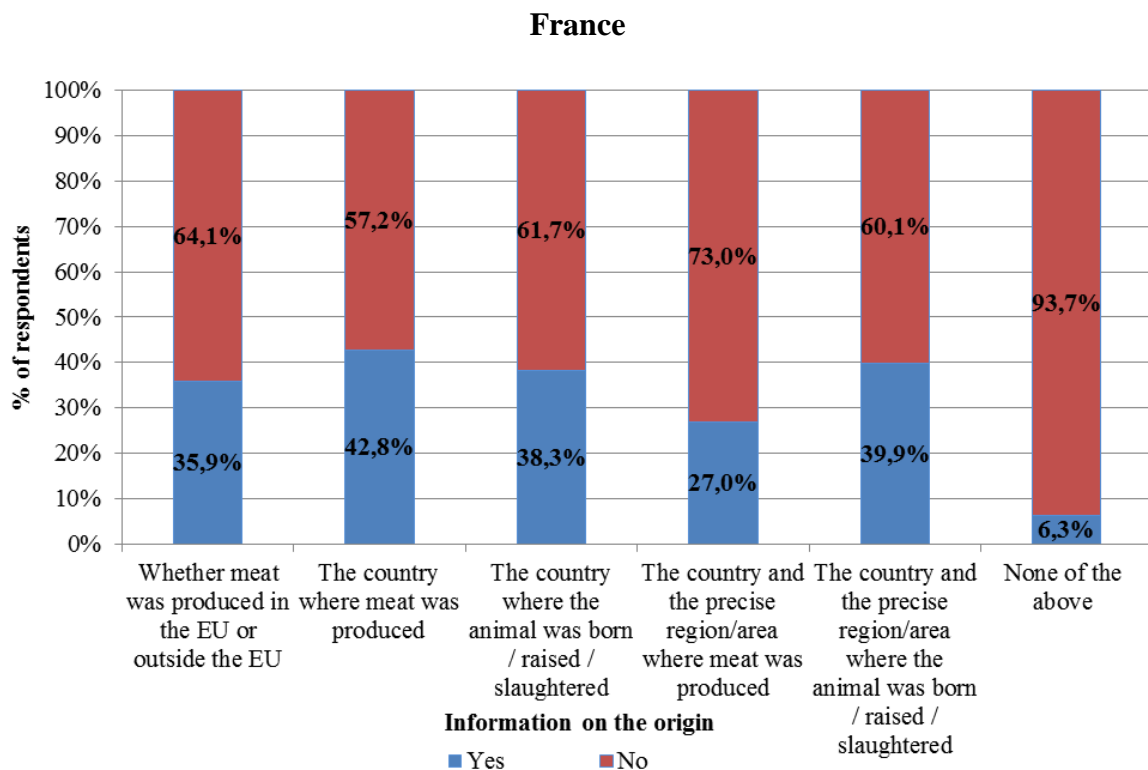


**Deutschland**



**Figure 8 (continued): Information required on the origin of the meat contained in cooked ham, by Member State**

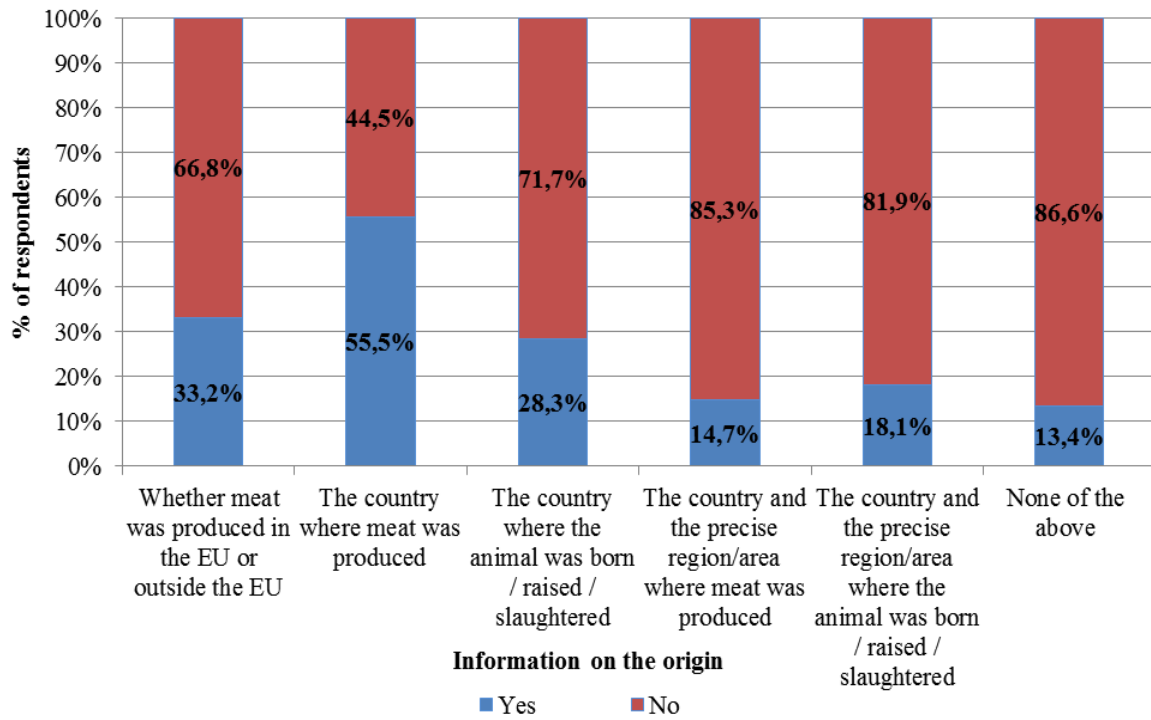
*“When you purchase cooked ham, which of the following information regarding the origin of the meat do you find necessary to know?” (Question 13 of the survey)*



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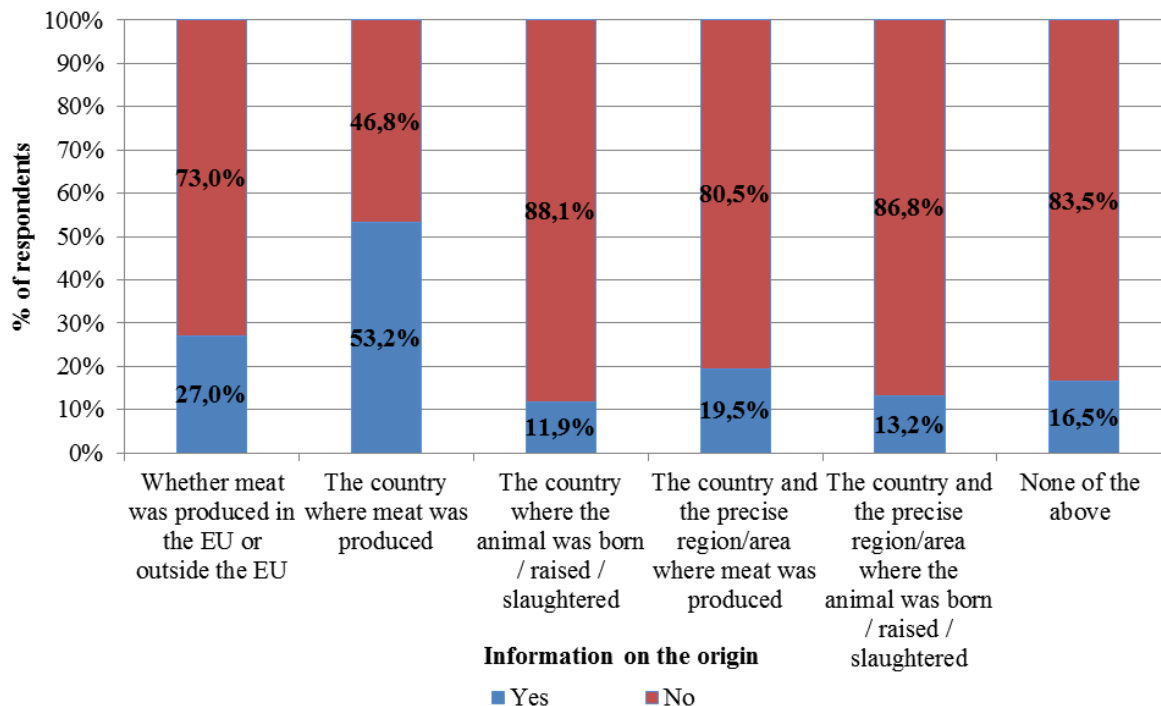
**United Kingdom**



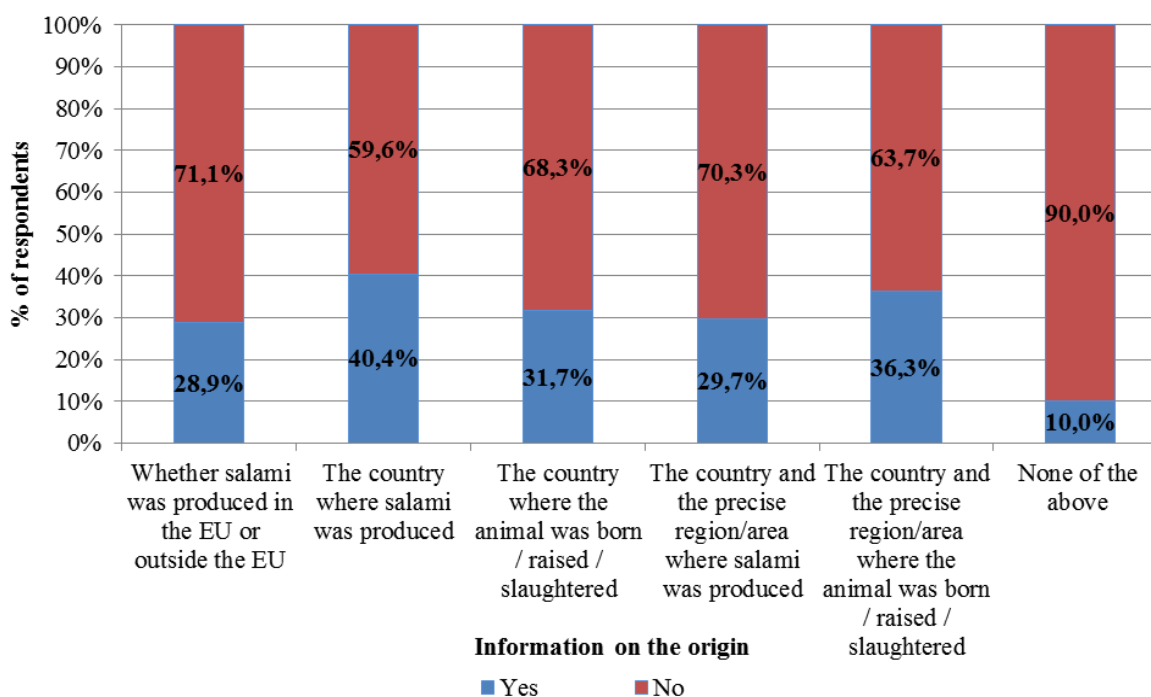
**Figure 9: Information required on the origin of the meat contained in frozen pizza with salami, by Member State**

“When you purchase frozen pizza with salami, which of the following information regarding the origin of the meat do you find necessary to know?” (Question 15 of the survey)

**Czech Republic**

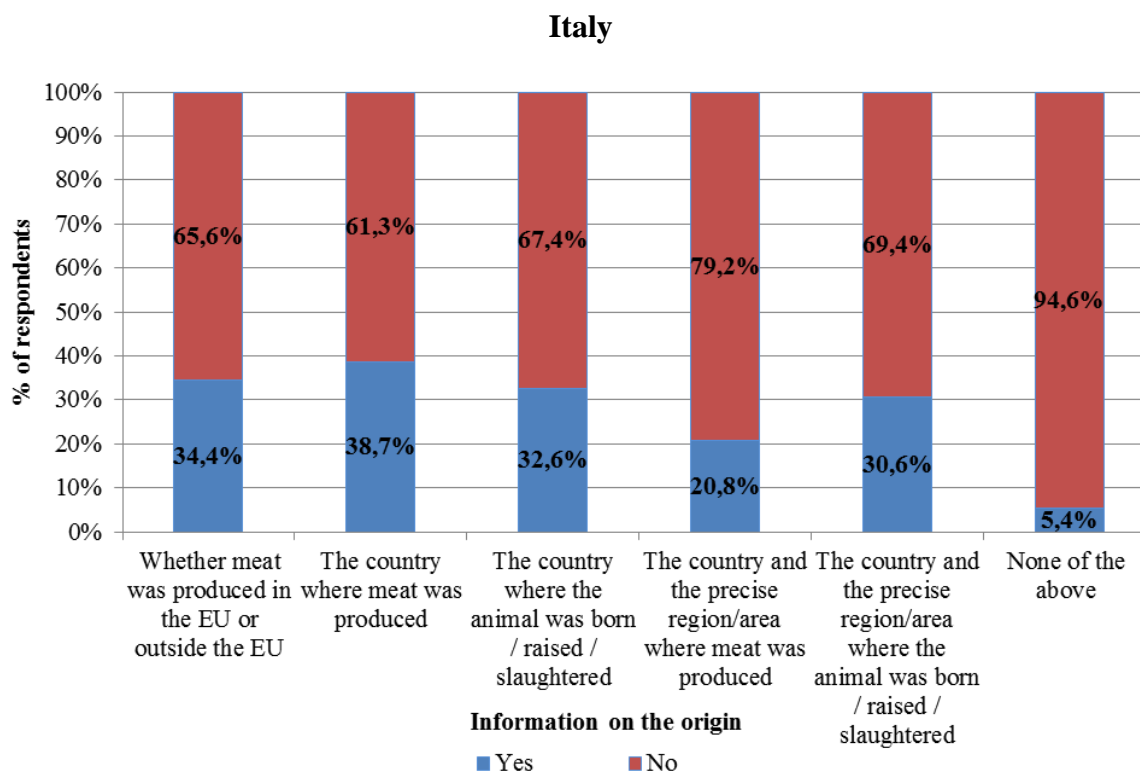
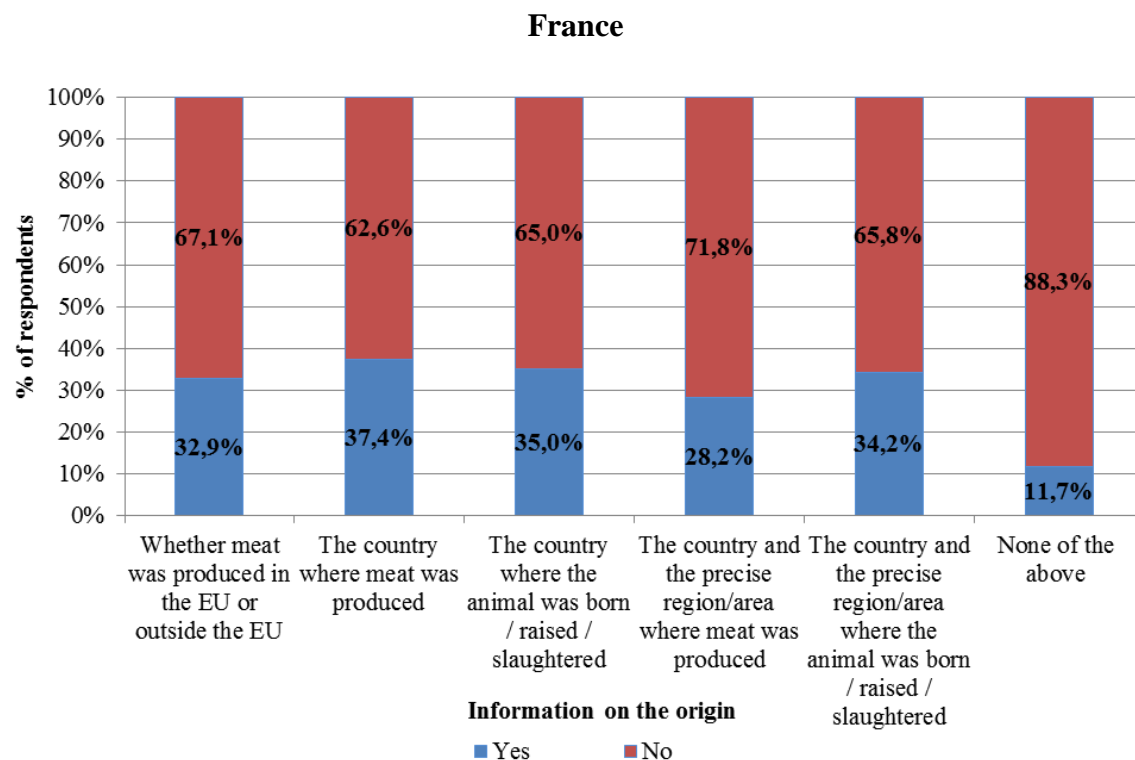


**Deutschland**



**Figure 9 (continued): Information required on the origin of the meat contained in frozen pizza with salami, by Member State**

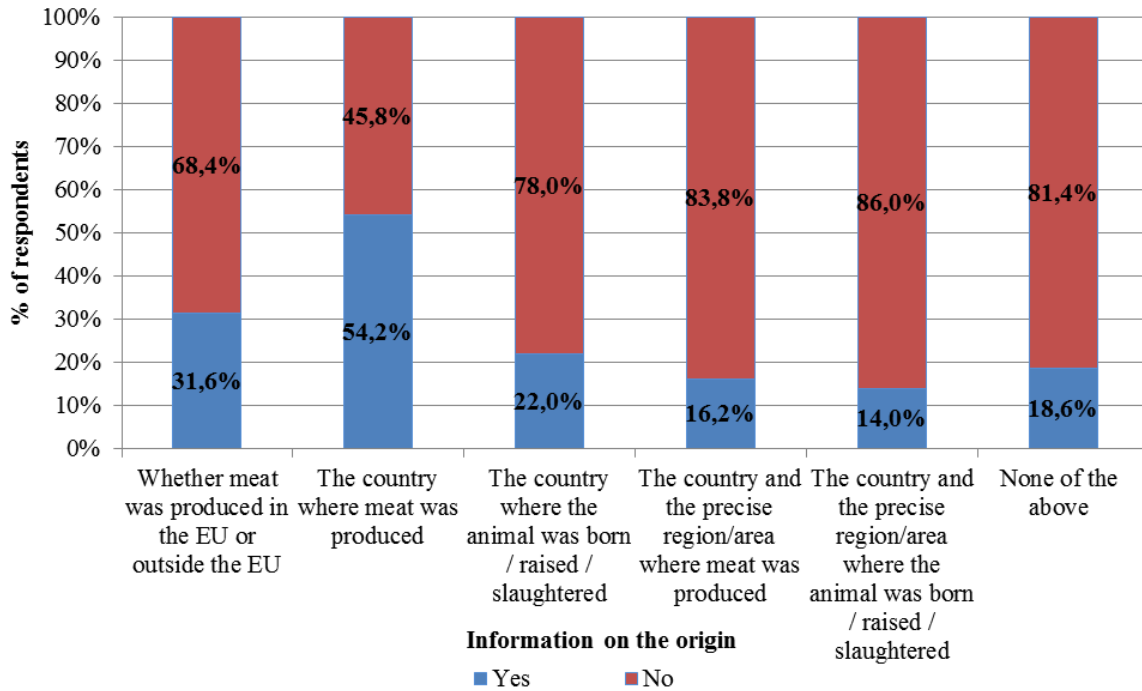
*“When you purchase frozen pizza with salami, which of the following information regarding the origin of the meat do you find necessary to know?” (Question 15 of the survey)*



**Figure 9 (continued): Information required on the origin of the meat contained in frozen pizza with salami, by Member State**

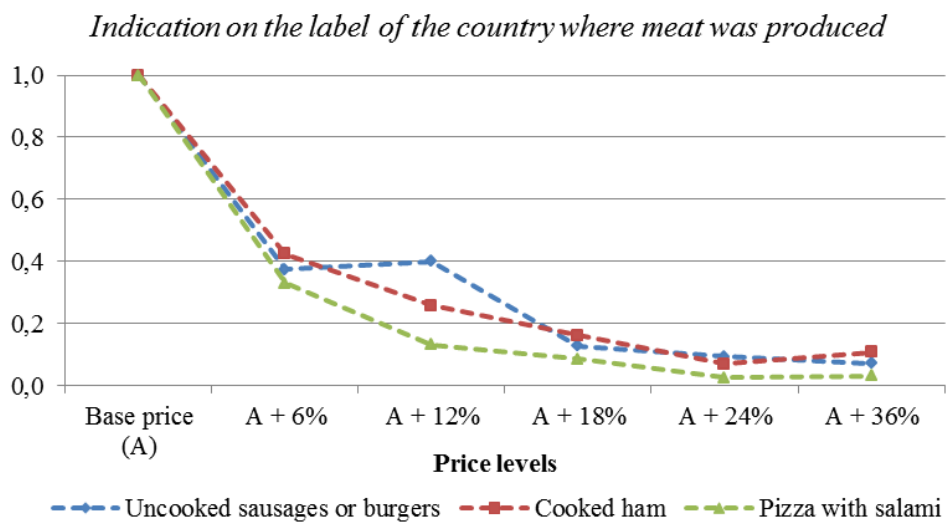
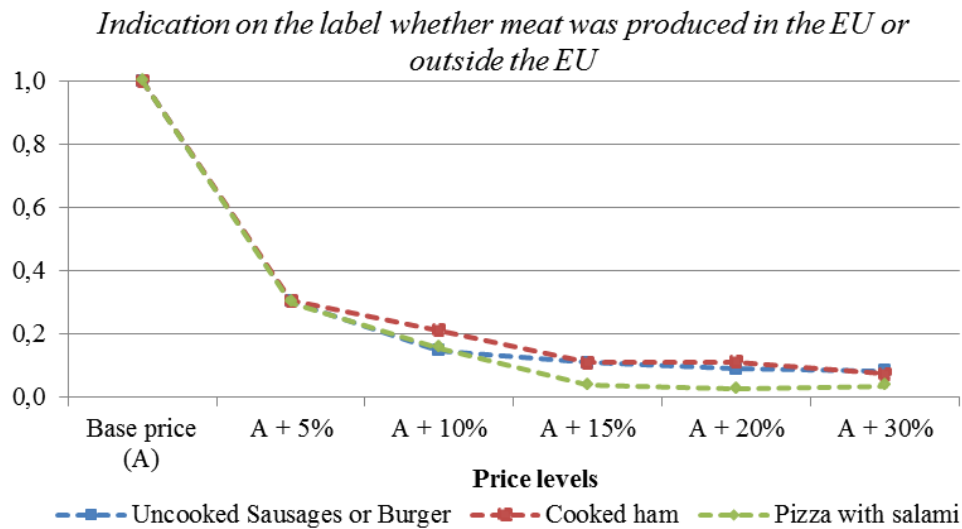
*When you purchase frozen pizza with salami, which of the following information regarding the origin of the meat do you find necessary to know? (Question 15 of the survey)*

**United Kingdom**



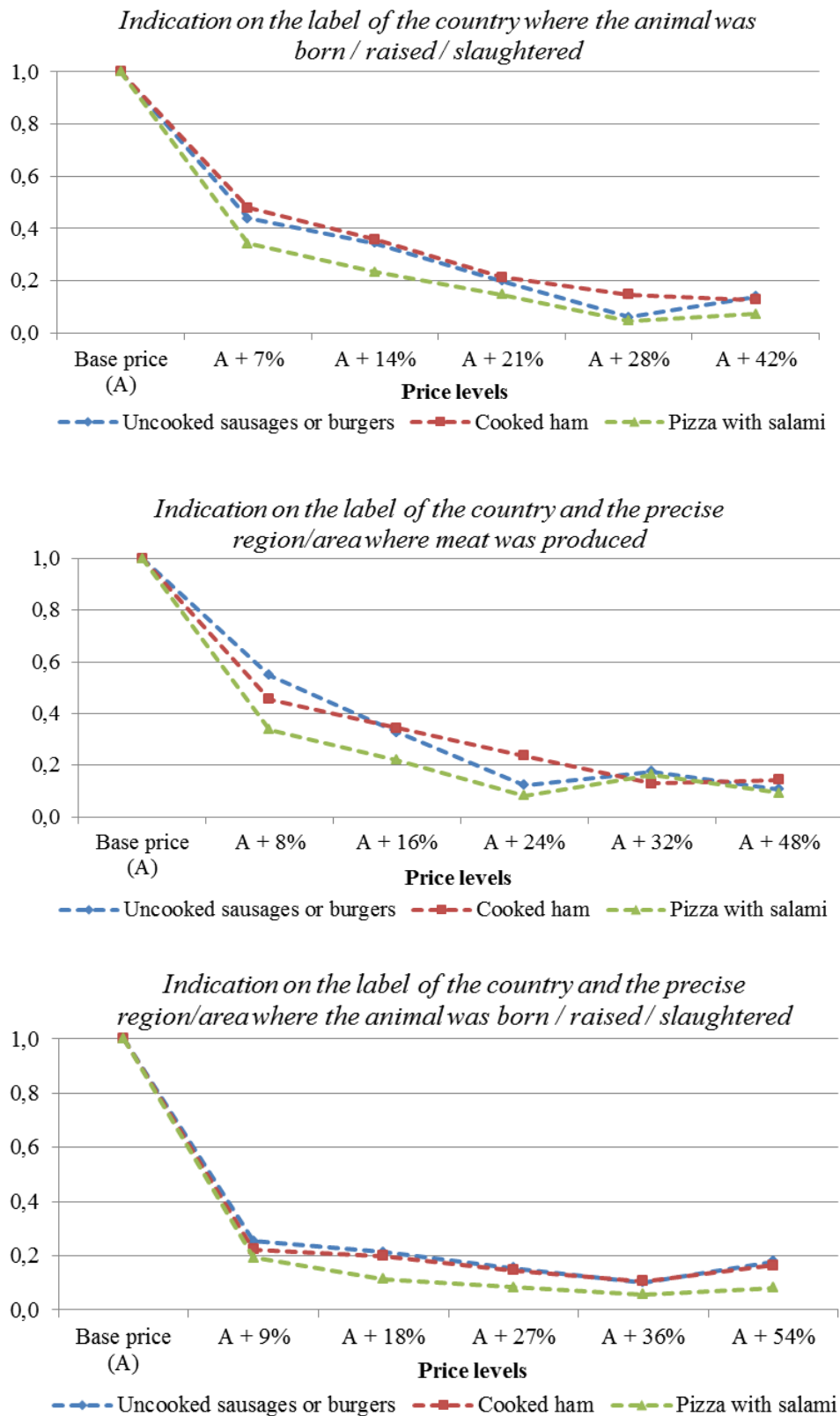
**Figure 10: WTP according to the level of detail provided on the indication of origin (average data for 15 EU countries)**

Note: Assuming as equal to 1 the prevalence of consumers who are willing to pay the base price (A), the graph represents the relative prevalence of consumers willing to pay different price options.



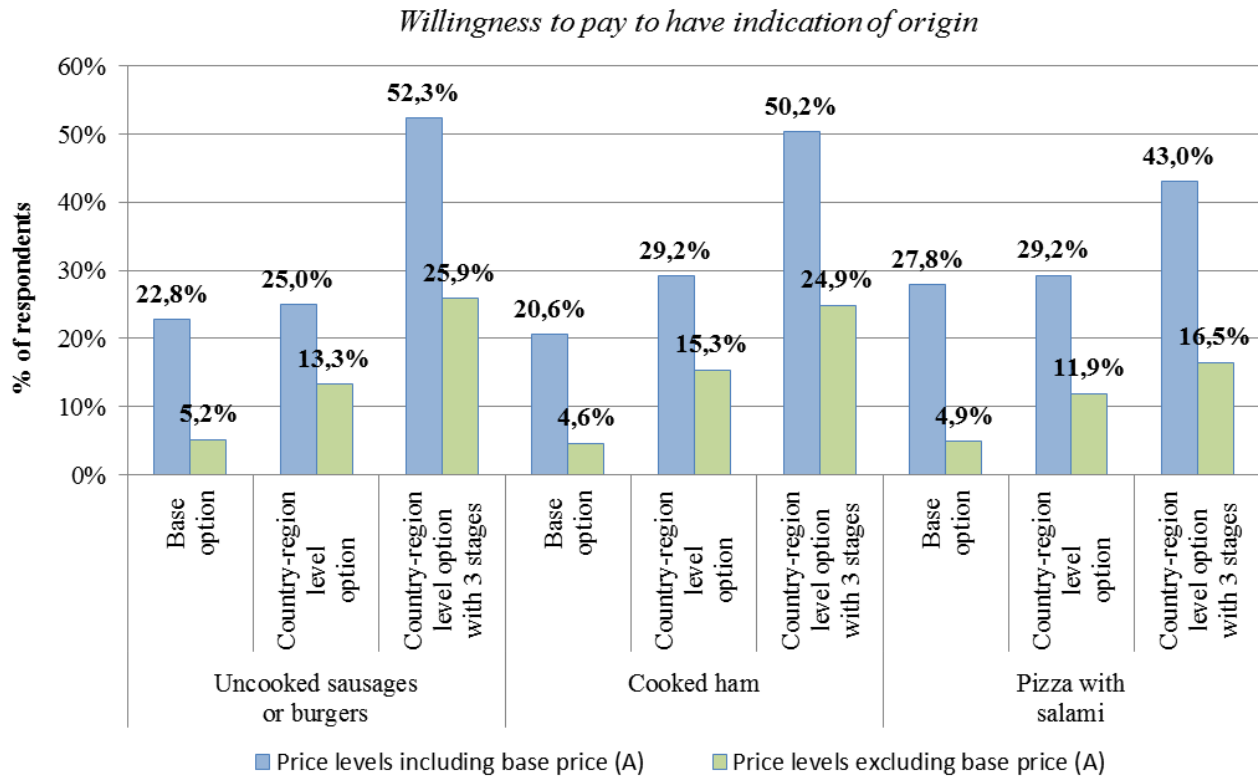
(continued)

**Figure 10 (continued): WTP according to the level of detail provided on the indication of origin (average data for 15 EU countries)**





**Figure 11: Willingness to pay by type of indication of origin (average data for 15 EU countries)**



**Price levels by product**

*Base option* including: “No indication on the origin of the meat” and “Indication on the label whether meat was produced in the EU or outside the EU”;

*Country-region level option* including: “Indication on the label of the country where meat was produced” and “Indication on the label of the country and the precise region/area where meat was produced”;

*Country-region level option with 3 stages* including: “Indication on the label of the country where the animal was born / raised / slaughtered” and “Indication on the label of the country and the precise region/area where the animal was born / raised / slaughtered”.