

# Country of Origin Labelling: A Synthesis of Research

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**Country of Origin Labelling: A Synthesis of Research**  
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## 1.1 Introduction

The Food Standards Agency has commissioned a number of studies on both nutritional and general food labelling. This research has focused on a range of issues surrounding general food labels, including consumers' perceptions and understanding of food labels, how consumers use labels when purchasing food products, and what factors, aside from labels, influence consumers' food purchasing.

The country of origin of food products is one piece of food label information that has received much attention from consumers, researchers, and the general media. Some of this background interest has been generated by various food scares over the past decade or so, and by agricultural crises such as the Avian Flu and the Foot and Mouth outbreaks. These events seem to have raised public awareness about the food chain, and about the international nature of food production, processing and distribution. This, in turn, has raised interest in the country of origin of many food products.

Under EU legislation country of origin information is mandatory for beef, veal, fish and shellfish (whether pre-packed or loose), wine, most fresh fruit and vegetables, honey, olive oil, and poultry meat imported from outside the European Community. For foods other than those listed above, there are general rules in the European Union labelling legislation, which require country of origin labelling in cases where purchasers might otherwise be misled. Voluntary country of origin labelling may be provided on foods, but legislation demands that such information must not mislead the consumer.

This report presents a synthesis of the findings from five of the research studies on country of origin and general food labelling that have been commissioned by the Food Standards Agency. Three of these studies (those by BMRB, NatCen, and Campden-BRI) were specifically about country of origin labelling; the other two (those by Oxford Evidentia and Ipsos MORI) were about the use of food labels more generally, but included issues surrounding country of origin labelling. Summaries of each of these studies can be found in Annex A of this report.

## 1.2 Key findings of the Research Synthesis

- The evidence review revealed that general food labels in the UK are read on initial purchases by approximately half the population only. When asked about what information they looked for when purchasing food for the first time, only 11% of respondents in the NatCen survey said that they looked for country of origin labels. However, when asked specifically in a separate question whether they looked for country of origin information, the proportion that said that they did rose to 52%.
- Though consumers are aware of country of origin labelling, this information is not a main concern when shopping.
- All studies presented evidence of confusion as to whether ‘country of origin’, (particularly with animal products) refers to where animals are born, raised, slaughtered or processed. The term refers to the place of the last substantial change.
- The country of origin literature is replete with evidence of ‘consumer ethnocentrism’, ‘food nationalism’ and ‘food patriotism’. This generally refers to the belief that one’s own country or region produces safer and better food than other countries or regions.
- A link has been identified amongst consumers between the perceived freshness and local origin of food products.
- Evidence on what is the most important information on labels is mixed. According to the evidence review, country of origin ranks alongside price and use-by/best-before dates as the most commonly sought information on food labels. However, the behaviour study, the Citizen’s Forums study, and the omnibus consumer survey reviewed for this report each found that price and use-by/best-before information were considered to be more important for consumers than country of origin.
- The evidence on the price and willingness to pay for country (or region) of origin products is mixed. Consumers who have a commitment to local, organic and ‘natural’ methods of food production are likely to pay a modest premium despite their economic circumstances.
- Standard-assured logos are often misunderstood, as consumers often believe them to be assurances of complete safety and country of origin.
- Consumers felt it would be beneficial for COOL to be displayed prominently so it is easily found.
- The time available for food purchasing also affects consumers’ use of food labels. So too does the format of many food labels (size, fonts, style of language), and consumers’ values and attitudes to food production, distribution, and preservation.
- Food labelling on most products presents consumers with more information than they can reasonably process, resulting in information overload. This often leads to confusion, misunderstanding and uncertainty which, in turn, causes scepticism and mistrust of food labels.
- Consumers would like country of origin labelling to include easily visible strong images indicating country of origin from the consumers’ perspective (i.e. where the product began or was raised).
- The country of origin label is an important indicator for consumers of both the quality and safety of food. A key feature of country of origin labelling is the traceability of food products, particularly their origin, production and distribution histories.

## Table of Contents

<b>1.1 Introduction .....</b>	<b>A</b>
<b>1.2 Key findings of the Research Synthesis.....</b>	<b>B</b>
<b>2 Executive Summary .....</b>	<b>i</b>
<b>2.1 Consumer Use, Awareness and Demands for COOL .....</b>	<b>i</b>
<b>2.2 Consumer Understanding of COOL .....</b>	<b>ii</b>
<b>2.3 The Influence of Price and Willingness to Pay for COOL .....</b>	<b>iii</b>
<b>2.4 The Form and Content of COOL .....</b>	<b>iii</b>
<b>2.5 Existing COOL Logos: Appropriateness and Suitability.....</b>	<b>iv</b>
<b>3. Introduction .....</b>	<b>1</b>
<b>3.1 Consumers' Use, Awareness and Demand for COOL.....</b>	<b>2</b>
<b>3.2 Where and How COOL Is Useful .....</b>	<b>4</b>
3.2.1 COOL and Consumer Ethnocentrism.....	4
3.2.2 Local Origin of Food .....	5
3.2.3 Quality and Safety .....	5
<b>3.3 Consumers' Lack of Understanding About COOL .....</b>	<b>6</b>
<b>3.4 Consumer Confidence in COOL.....</b>	<b>7</b>
3.4.1 Confidence in official sources (particularly in one's own country) .....	7
3.4.2 Ambiguity and misleading information on COOL.....	8
<b>3.5 COOL Linked with Other Characteristics .....</b>	<b>8</b>
3.5.1 Quality and safety: assurance .....	9
3.5.2 Local products = Quality products .....	9
3.5.3 Local sources = Less ambiguity = More trustworthy .....	10
3.5.4 Environmental issues .....	10
<b>3.6 The Influence of Price and Willingness to Pay for COOL .....</b>	<b>10</b>
<b>3.7 The Form and Content of COOL .....</b>	<b>11</b>
<b>3.8 What Consumers Want COOL To Include .....</b>	<b>12</b>
<b>3.9 The Appropriateness and Suitability of COOL Logos .....</b>	<b>12</b>
<b>3.10 The Uptake of the Food Standards Agency COOL Guidance.....</b>	<b>13</b>
3.10.1 Commonalities with Consumer Studies .....	15
<b>3.11 Commonalities around General Food Labelling.....</b>	<b>16</b>
3.11.1 Values influencing general food labelling behaviours .....	16
3.11.2 Information overload: Catering for varied value priorities .....	16
3.11.3 Expiry / Use-By / Best-Before Dates .....	17
<b>4 Conclusions .....</b>	<b>19</b>
<b>Annex A – Research Methods of the Five Studies .....</b>	<b>26</b>

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## 2 Executive Summary

This synthesis presents the evidence from five commissioned reports on country of origin labelling (COOL) in relation to the following research questions:

- Consumers' use, awareness and demand for COOL
- Consumers' understanding of COOL
- The influence of price and willingness to pay for COOL
- The form and content of COOL, and possible information overload
- The appropriateness and suitability of existing COOL logos
- The uptake of FSA's COOL guidance by the food industry

The five pieces of research commissioned by the Food Standards Agency are:

- An evidence review by Oxford Evidentia (Davies, MacPherson and Froud, 2010),
- A series of 'Citizens Forums' conducted by the BMRB (Stockley and Hunter, 2010),
- An Ipsos MORI qualitative study exploring consumer use of food labelling (Enright, Good and Williams, 2010),
- A UK wide omnibus survey including country of origin questions (NatCen, 2010).
- A survey by Campden BRI of UK-marketed products assessing the extent to which the FSA guidance on country of origin is being implemented (Leeks, Lawler, Monadjemi and Wood, 2010).<sup>1</sup>

### 2.1 Consumer Use, Awareness and Demands for COOL

The evidence of consumer awareness of COOL is mixed. The Oxford Evidentia study found evidence of increased awareness of country of origin labelling by consumers in Britain and other countries (British Market Research Bureau, 2007; IGD, 2009). However, high levels of awareness do not necessarily translate into use, as consumers are not making country of origin labelling a priority when actually shopping (Stockley and Hunter, 2010; Enright, Good and Williams, 2010).

When asked specifically whether they looked for country of origin information, over half of the consumers said that they did so, according to the NatCen (2010) survey. A quarter (25%) 'sometimes' look for country of origin, and just over a quarter looked 'frequently' (16%) or 'always' (11%).

COOL is also used by consumers to take into consideration environmental issues (e.g. awareness of food miles) of transporting food products across the world (BMRB, 2007).

The Oxford Evidentia review found that trust about food products was another reason why consumers use COOL, as some origin labels generated confidence in the product. For instance, a study in Australia (Coveney, 2008) found that labels that indicated the origin of food products as being 'Made in Australia' engendered feelings of trust. Wier et al (2008) found that country of origin is closely related to trust, with 80% of the participants in a study of British and Danish households stating that their confidence in the quality of food products is greater when the producer is domestic. This was confirmed by the Ipsos MORI study, which found that *"the use of 'British' on a packet of chicken may not convey the country of*

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<sup>1</sup> The Campden BRI report is the only study that does not include results from consumers.

*origin to the consumer but it may convey an implication of quality*” (Enright, Good & Williams, 2010:30) and, by implication greater trust in the product.

The Citizens’ Forum (Stockley and Hunter, 2010) study, however, found that some consumers use COOL to avoid products from some countries, such as corned beef from China (which consumers expected to be from Argentina or Brazil). Others avoided food products from countries for political reasons, such as those from South Africa during the apartheid era.

There were commonalities amongst the findings of the various studies commissioned by the FSA as regards to consumer use of COOL:

- Both the Oxford Evidentia and Ipsos MORI studies found that the association of country of origin with quality, and indeed safety of food, was especially apparent with meat purchasing.
- The Ipsos MORI and the BMRB studies found that consumers use COOL to establish the authenticity and genuineness of food products.
- COOL was used by consumers as a means of *“providing economic benefits for local producers and local economies”* (Davies, MacPherson and Froud, 2010:20). The NatCen (2010) survey found that amongst the 52% of consumers who looked for COOL, they were mainly doing so out of a preference to buy British/support British farmers (34%). The Citizens’ Forums study found that *“Farmers markets and local shops were seen as much more trustworthy in providing more accurate information on origin and staff in these shops were perceived to be more knowledgeable about where the food came from”* (Stockley and Hunter, 2010:27).

## 2.2 Consumer Understanding of COOL

The Ipsos MORI study found that participants believed that COOL indicated the origin of the product (i.e. where the product was born/grown and raised/harvested), rather than the country where the ‘last substantial change’<sup>2</sup> took place. Similarly, the responses in the Citizen’s Forums study by BMRB (2010) also indicated that consumer understanding refers to the place where the product came into being or was grown/raised. When consumers were asked what they thought COOL meant when displayed on meat or meat products<sup>3</sup>, only 12% of the omnibus survey (NatCen, 2010) sample had an accurate understanding of what country of origin labelling actually signifies (the place of last substantial change).

All four consumer studies<sup>4</sup> found there is a lack of understanding, and/or confusion, about what COOL actually represents. When participants in France, England and Sweden were presented with labels containing country of origin information, Ngapo et al (2004) found consumers did not know which part of the

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<sup>2</sup> The term ‘place of last substantial change’ is recognised by Codex and the World Trade Organisation as the defining feature of a product’s country of origin. The Food Standards Agency notes that “this is consistent with section 36 of Trade Descriptions Act 1968 [whereby] goods shall be deemed to have been manufactured or produced in the country in which they last underwent a treatment or process in a substantial change” (Food Standards Agency 2009:6)

<sup>3</sup> Response options and percentages selected were: ‘Where the animal was farmed’ (54%); ‘Where the food was processed’ (42%); ‘Where the animal was slaughtered’ (26%); ‘Where the animal was born’ (23%); and ‘Where the last substantial change took place’ (12%). Given the total of the frequencies it is clear that respondents were able to select more than one option.

<sup>4</sup> All studies commissioned by the FSA, except the Campden BRI report.

food production (born, raised, grown, slaughtered, processed, packaged, etc.) was represented by the label.

### 2.3 The Influence of Price and Willingness to Pay for COOL

Price and the cost of food were identified by all four consumer studies as amongst the most frequently used labels influencing consumers' behaviour. The Oxford Evidentia review found that price frequently ranked alongside, if not above, country of origin, nutritional content, expiry date<sup>5</sup>, and quality assurance labels as decisive factors in consumers' food choice. BMRB found that "*the information provided on labels ... that was most likely to have an effect on purchasing decisions was considered to be: the brand, sell/use-by date, product description, special offers, and price*" (Stockley and Hunter, 2010:11). The Ipsos MORI study also found that brand, price and expiry date are what consumers want to see on food labels. Eleven percent of consumers in the NatCen (2010) survey spontaneously cited country of origin as important information, while price (54%) and best before/use by (55%) were believed to be more crucial labelling information.

The evidence on price and consumers' willingness to pay for country of origin assurance, or for food quality assurance, is generally mixed. The Oxford Evidentia review found that whilst there is evidence that consumers will pay a premium for perceived superior foods in general, and assured country of origin foods in particular, this premium is generally rather modest. The BMRB study of Citizens' Forums also concluded that "*cost and value for money were central factors in making the decision where to shop*" (Stockley and Hunter, 2010:3). The Ipsos MORI study found that "*price can eclipse other aspects of the label, especially for lower income consumers*" (Enright, Good and Williams, 2010:4).

The evidence review by Oxford Evidentia, however, found that willingness to pay for perceived superior food products is also not as directly related to income and social demographic factors as one might expect, but is mediated by consumers' value priorities and beliefs. Ipsos MORI cited other mediating factors between a food label and consumers' behaviour which included the consumer's personal stereotypes and associations, e.g. assumed connections such as pasta with Italy or basmati rice with India.

### 2.4 The Form and Content of COOL

Consumers made reference to the images indicating origin (e.g. national flags) or labels with specific countries mentioned (e.g. British chicken, Scottish beef).

The use of strong imagery (icons that do not include text) was also mentioned in the Citizen's Forums. Consumers felt it would be beneficial for COOL to be displayed prominently so it is easily found. A further suggestion included the use of a standardised system on a range of products to make it easier for consumers to understand the COOL information.

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<sup>5</sup>The expiry date of food, though referred to extensively in the literature, is not a term routinely used in the UK. Rather the terms 'use-by' and 'best-before' are generally used in the UK. The former label indicates to consumers the date beyond which should not be consumed for food safety reasons. The latter is an indication of food quality which indicates that the food product can be safely consumed beyond this date, but that its quality may be diminished.

The Citizen's Forums also reported that consumers felt the ideal COOL ought to include information from the consumer's perspective of origin, namely the birthplace/source or the country where the product is grown or raised. The omnibus survey had a similar finding, with 76% of the sample wanting the label to include information about where the animal was farmed.

## **2.5 Existing COOL Logos: Appropriateness and Suitability**

According to the Oxford Evidentia review, logos could be used to ensure the country of origin of ingredients, and consumers stated that they would change their purchasing decisions in light of the information provided. However, as the BMRB study pointed out, not fully understanding what the logo represents may lead to decisions based on false information (e.g. believing a quality standard logo to be an assurance of complete safety and country of origin).

## Country of Origin Labelling: A Synthesis of Research

### 3. Introduction

This report is a synthesis of five pieces of research commissioned by the Food Standards Agency on country of origin labelling (COOL). The five research reports are:

- An evidence review of general food labelling by Oxford Evidentia (Davies, MacPherson and Froud, 2010),
- A series of ‘Citizens Forums’ conducted by the BMRB (Stockley and Hunter, 2010),
- An Ipsos MORI qualitative study exploring consumer use of, and behaviour in response to, food labelling (Enright, Good and Williams, 2010),
- An omnibus survey of adults in the UK, including questions about country of origin of food products (NatCen, 2010)
- A survey of UK-marketed products by Campden BRI assessing the extent to which the FSA guidance on country of origin is being implemented (Leeks, Lawler, Monadjemi and Wood, 2010).

A summary of the methods used by each of these studies is presented in Annex A. They represent a range of research methods that collectively, though not necessarily individually, provide evidence on the following issues:

- Consumers’ use, awareness and demand for COOL
- Consumers’ understanding of COOL
- The influence of price and willingness to pay for COOL
- The form and content of COOL, and possible information overload
- The appropriateness and suitability of existing COOL logos
- The uptake of FSA’s COOL guidance by the food industry

### 3.1 Consumers' Use, Awareness and Demand for COOL

In the NatCen (2010) survey, when consumers were asked what information they look for when purchasing food for the first time, only 11% spontaneously mentioned country of origin (compared to 30% mentioning price, fat content: 30%, and use by/best before date: 27%).

When asked specifically in a separate question whether they looked for country of origin information, the proportion that said that they did rose to 52%. A quarter (25%) 'sometimes' looked for country of origin, and just over a quarter looked 'frequently' (16%) or 'always' (11%).

A number of studies included in the Oxford Evidentia review (Becker, 2001, Mesias et al, 2005, Grebitus and Bruhn, 2006, Banterle and Stranieri, 2008) have found that country of origin is an important indicator for consumers of both the quality and safety of food. The Ipsos MORI study corroborated that *"the use of 'British' on a packet of chicken may not convey the country of origin to the consumer but it may convey an implication of quality"* (Enright, Good and Williams, 2010:30). The Citizens' Forums found that quality assurance labels which used a British flag as part of the logo led to confusion about food safety. Participants *"thought that it signified that the product was British in origin and that it conformed to British standards"* (Stockley and Hunter, 2010: 23). Both the Oxford Evidentia and Ipsos MORI studies found that the association of country of origin with quality, and indeed safety of food, was especially apparent with meat purchasing.

The evidence of consumer *awareness* of COOL is mixed. The Oxford Evidentia study found evidence of increased awareness of country of origin labelling by consumers in Britain. A UK survey in 2007 found that the proportion of consumers who did not know if the fruit or vegetables they purchased was from Britain or another country fell from 24% in 2006 to 13% in 2007 (BMRB, 2007).

Another survey, which looked at the aspects of labelling that inform consumer choice, found that the country of origin information continues to increase as a 'driver' for decision making (IGD, 2009). The Citizens' Forums found that *"awareness of country of origin labelling (COOL) was high among participants from all areas...though participants said that, as a matter of course, they noticed or consciously looked for COOL very infrequently while shopping"* (Stockley and Hunter, 2010:12). This was corroborated by the Ipsos MORI study, which found that *"country of origin information is not a priority when shopping in the supermarket"* (Enright, Good and Williams, 2010:6).

The Ipsos MORI study contrasted with the Oxford Evidentia review, and the BMRB Citizens' Forum report, in finding that *"most [consumers] are unaware of conventions around origin labelling"* (Enright, Good and Williams, 2010:34). Ipsos MORI also found that the notion of country of origin meaning 'location of last substantial change' in the food production and distribution process, *"was not mentioned spontaneously"* (*ibid*).

This finding is echoed by the consumers in the omnibus survey (NatCen, 2010). They considered country of origin as one of the least important pieces of information on a food label. Eleven percent of participating consumers cited country of origin as being one of the three most important aspects (out of a list of 13 options) of the label to them, whilst price (54%) and best before/use by (55%) were believed to be more important labelling information.

There is a discrepancy between consumers' belief that COOL is not amongst the most important information on food labels, and their views about how they feel about its value generally. According to the NatCen (2010) results, given a set list of responses (very important/fairly/neither/not very/not at all), consumers personally felt that COOL was important, with 45% responding that it was important (16% 'very important' and 29% 'fairly important'). Fewer (39%) responded that COOL labelling was not important, with 21% saying it is 'not very important' and 18% stating it is 'not important at all'.

The 48% of consumers in the NatCen (2010) survey who reported that they did not look for COOL were asked why, and the two main reasons cited were 'not interested' (mentioned by 21%) and 'not important' (20%).

Both the Ipsos MORI and the BMRB studies found that consumers use COOL to establish the authenticity and genuineness of food products. Ipsos MORI found that authenticity was one of the four reasons why consumers use country of origin information on food products – the other three reasons being safety, animal welfare, and food miles. By 'authenticity', the participants in the Ipsos MORI study meant "*strongly associated with a particular country*" (Enright, Good and Williams, 2010:7), and "*reinforced links with traditional foods such as pasta [Italy] or stew and dumplings [Britain]*" (Enright, Good and Williams, 2010: 34). Similarly, the BMRB study found that "*consumers look for origin information when they were looking for a specific product that was strongly associated with a particular country. These 'authentic' products were considered to be of a higher quality than similar products from other countries and were therefore more desirable*" (Stockley and Hunter, 2010: 12). The Citizens' Forums conducted by BMRB gave examples of such authenticity as raisins coming from California (and not from Tunisia), and corned beef coming from Argentina (and not from China).

The Oxford Evidentia review found that trust was another reason why consumers use COOL, in the sense that although consumers are somewhat cynical about food labelling, an Australian study found "*the labelling of a food as 'Made in Australia' generated considerable trust*" (Coveney, 2008: 241). More specifically, this study found that products labelled as 'Made in Australia' "*were seen as safer than products from other countries*" (Davies, MacPherson and Froud, 2010:6).

The BMRB study also found that some consumers use COOL not to buy products from some countries. The Citizens' Forums cited labels such as 'Made in South Africa' in the 1980s, and those that indicated that corned beef was from China (when they would have expected it to be from Argentina or Brazil), would be avoided by some consumers because of geo-political reasons, or of uncertain food production methods that are associated with a particular country (e.g. concerns about poor food quality or hygiene practices in China).

COOL was also used by consumers as a means of "*providing economic benefits for local producers and local economies*" (Davies, MacPherson and Froud, 2010:20). The BMRB study, in particular, found that "*participants expressed a desire to try and support smaller producers, with participants from rural areas saying they wanted to support the local economy and those from urban areas saying that they wanted to back small businesses*" (Stockley and Hunter, 2010:24). COOL allowed them to do this.

COOL is also used by consumers to take into consideration environmental issues of transporting food products across the world. The BMRB study found that "*sourcing food from closer to home was an issue for those consumers who were conscious of the environmental impact of imported food*" (Stockley and Hunter,

2010:12). The study went on to consider respondents' environmental concerns in greater detail, and found that they:

*“were surprised to see just how much of their shopping basket came from unexpected parts of the world and stated that, where costs permitted, it had affected their purchasing behaviour. For products that could be easily grown in the UK this was regarded as wasteful, environmentally unsound and indicative that we were now relying too much on other countries to provide our food”* (Stockley and Hunter, 2010:20).

## 3.2 Where and How COOL Is Useful

There is evidence from three of the studies that consumers use COOL for a variety of purposes. The consumers taking part in the NatCen (2010) survey were asked to select different categories of food (as many as applied) for which they felt COOL should be provided. The most frequently cited categories were: fresh meat (69%), meat products (60%), fruit and vegetables (59%), and fish (54%). Less frequently mentioned were: cheese (43%), ready meals (32%), honey (28%) and baked products (26%). A further 15% responded that COOL should not be provided on any products.

The participants in the Citizen's Forums also wanted COOL to be apparent when purchasing meat, fresh fruit and vegetables. However, they felt the labelling should be succinct and not contain too much information. It was felt that even if some consumers did not use the labelling information, it should be available for those who chose to use COOL. If used, COOL could inform choices about quality, health and safety, as well as environmental issues. As part of this information, the labelling would ideally create more transparency for the food chain. Though the participants felt that COOL was an important factor, the main factor taken into account when purchasing a product was the cost.

Similarly, the Ipsos MORI study found that although COOL was not the primary factor in determining their food purchases, participants did use information about country of origin in purchasing specific products such as meat. Consumers associated quality with 'local' or 'British' meat, with many claiming to prefer to use local butchers over supermarkets (though in reality purchasing meat in supermarkets, albeit with COOL specifying 'British' or 'Scottish').

### 3.2.1 COOL and Consumer Ethnocentrism

The Oxford Evidentia review found that *“the country of origin literature is replete with evidence of ‘consumer ethnocentrism’, ‘food nationalism’ and ‘food patriotism’. This generally refers to the belief that one’s own country or region produces safer and better food than other countries”* (Davies, MacPherson and Froud, 2010, ii). The perception that food from some countries is 'safer' than from others, however is not always related to own-country food nationalism. In-depth interviews with industry experts and/or companies (Knight, et al., 2007) revealed that 'less risky' countries (e.g. New Zealand) were associated with high quality control and traceability.

The BMRB report notes that *“[British] consumers regard British food as high quality and there is a demand for more home grown and local produce”* (Stockley and Hunter, 2010:30). The Ipsos MORI study also found that *“the British flag is often regarded as a benchmark signifying ‘local’ (which reassures on food miles); high quality farming practices (which reassures on animal welfare); good nutrition*

*(which reassures on health); and fresh*” (Enright, Good and Williams, 2010:31). It appears that country of origin has an association with local origin of food and food production.

### 3.2.2 Local Origin of Food

The importance of the local origin of food was mentioned in the Oxford Evidentia review, the BMRB Citizens’ Forum report, and the Ipsos MORI study. The Oxford Evidentia review found that freshness was frequently rated in a number of countries as being more essential than country of origin, including the UK (Ahlin and Hammers, 2006; European Commission, Directorate-General for Health and Consumer Protection, 2005; MORI, 2000; Schuttelaar & Partners, 2005). Such freshness was seen as more likely to be assured by local or near-local production and distribution of produce. Such produce was *“not only safer, better tasting, and of superior quality, but also easier to verify its quality”* (Davies, MacPherson and Froud, 2010:20).

Both the Ipsos MORI and the BMRB studies identified a link between the perceived freshness and local origin of food products. The former study notes that *“some consumers say they prefer to buy meat from the local butchers or farmers markets rather than the supermarket due to the connotations of freshness”* (Enright, Good and Williams, 2010:7), whereas local produce was mentioned by the Citizens’ Forums on the grounds that *“transporting these products over long distances would affect their quality and taste”* (Stockley and Hunter, 2010:22). Stockley and Hunter add that *“the reasoning used by participants to make judgements on the freshness of food was often not particularly considered or scientific”* (ibid).

Consumers taking part in the NatCen (2010) omnibus survey who looked for COOL (total of 52% of the sample, including % always/frequently/sometimes) were asked why they did so. The most frequently cited reason was a preference to buy British/support British farmers (34%). Locality was the next most frequent (in relation to food miles (17%), and preference for buying local (17%)).

### 3.2.3 Quality and Safety

Like the respondents in the Ipsos MORI study who placed trust in supermarkets to take responsibility for food safety, the consumers in the Citizen’s Forums also placed confidence in supermarkets or government/official sources to keep food safe. However, the Citizen’s Forums also reported that certain events prompted ‘scares’ or concerns. These ‘scares’ were generally raised through the media, and consumers responded by becoming more interested in COOL. Meat was perceived as presenting the greatest quality/safety risk, and there was distrust in the safety and environmental standards in foreign countries. Some countries were felt to be safer (e.g. Canada, USA, France) than others (e.g. developing countries). For fruit and vegetables, there was concern over the effect the quality of food that has been imported over a long distance.

The Citizen’s Forums reported that the *“primary aim of COOL should be to make the food journey...more transparent for consumers. This should enable them to better trace the origin of the foods they eat”* (Stockley and Hunter, 2010: 15). This is consistent with the findings of the Oxford Evidentia review (see below) concerning the importance to consumers of traceability of food production and distribution.

### 3.3 Consumers' Lack of Understanding About COOL

All four consumer studies found a lack of understanding, and/or confusion, about what COOL actually represents. When participants in France, England and Sweden were presented with labels containing country of origin information, Ngapo et al (2004) found consumers asking “*what does country of origin actually mean? - is it the country where the animals are raised or slaughtered, or where the meat is processed?*” Ngapo et al (2004:130). It is therefore important to further explore what it is that consumers would like in terms of origin labelling.

Only 12% of the omnibus survey (NatCen, 2010) sample had an accurate understanding of what country of origin labelling actually signifies (i.e. where the last substantial change to the food took place). Just over half of the consumers believed that it meant where the animal was farmed (54%), and slightly fewer thought it was where the food was processed (42%). The remaining responses included where the animal was slaughtered (26%), or where it was born (23%)<sup>6</sup>.

The Ipsos MORI study also found that participants often believe that COOL indicated the origin of the product, rather than the country where the ‘last substantial change’ took place. As has already been noted, the concept of ‘last substantial change’ in the food production and distribution process (as a defining feature of country of origin) had little traction with the respondents in the Ipsos MORI study.

The responses in the Citizen’s Forums also indicate that consumer understanding of the term ‘COOL’ refers to the place where the product came into being or where it was grown/raised, rather than where it is harvested/slaughtered and where it is processed. As the label currently reflects the location of the ‘last substantial change’ to the product, the final change may take place in a different country to all of the previous stages. For example, a pig may be born in one country and then raised in another, slaughtered in still another country and then processed in the country on the country of origin label. Consumers in the Citizens’ Forums felt that the final stage was not sufficient to establish the country of origin. As Stockley and Hunter noted “*processing was not enough to determine origin in participants’ opinions, the food product had to be grown or reared in this environment*” (Stockley and Hunter, 2010:17).

A related issue that causes misunderstanding and confusion about country of origin, and the quality/safety of food, is the role of traceability. The Oxford Evidentia review found that traceability has a number of meanings across the countries of Europe (Kehagia, et al, 2007), suggesting some confusion amongst consumers. The most common meaning that consumers attach to the word ‘traceability’, if they are aware of it, is “*the origin, production process and product information of food*” (Kehagia, et al, 2007:401). A number of other interpretations of traceability identified across Europe included “*tracking the hygiene of food products and assuring healthy food*”, “*guaranteeing the quality of food products*”, “*a tool to identify the suppliers and stocks of unsafe food products in cases of food recalls*”, and “*a tool for differentiating food products (e.g organic versus conventional foods*” (Davies, MacPherson and Froud, 2010: 5).

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<sup>6</sup> The options for response were multiple-choice, and therefore may be misleading as consumers could have had a different response to those included in the options. Some of the participants selected more than one of the options for this question.

Pieniak et al (2007) have also noted the different understandings of ‘traceability’ and country of origin in different countries of Europe, and have suggested that awareness of the concept of traceability was very low. Verbeke et al (2007) have also noted that despite traceability information being placed mandatorily on meat labels consumer interest in, and use of, traceability information was low (in Belgium).

The Citizen’s Forums study (Stockley and Hunter, 2010) found that British consumers also use COOL in part to trace the origins of food products. This is because of a desire to buy British and local produce as long as they could afford to do so, and because they *“believed that if the food travelled less distance from the farm to their table then it was likely to be fresher”* (Stockley and Hunter, 2010:24).

### **3.4 Consumer Confidence in COOL**

The evidence from the four commissioned studies that focussed on consumers yielded two central themes relating to consumer confidence in COOL. These are: confidence in official and government sources (particularly the sources from the participants’ own country), and lack of confidence related to unclear labelling and marketing cynicism.

The findings on these themes were identified in the Oxford Eviencia review (Davies, MacPherson and Froud, 2010), the Ipsos MORI study (Enright, Good and Williams, 2010) and in the Citizens’ Forums (Stockley and Hunter, 2010). The omnibus survey conducted by NatCen (2010) did not ask respondents specifically about their confidence in COOL, however it did ask if the current definition of COOL was suitable, of which 51% said it was not suitable and 14% were unsure as to the suitability.

#### **3.4.1 Confidence in official sources (particularly in one’s own country)**

The Oxford Eviencia review identified evidence that consumers view the responsibility for quality assurance as lying with governmental and public institutions, and that endorsements by national and/or international ‘authoritative’ organisations enhance the credibility of quality assurance schemes and labels (Feunekes et al., 2008, Loureiro and Umberger, 2003). An in-depth interview and focus group study in Australia (Coveney, 2008) found that although the participants were on the whole quite cynical about food labelling, labels that indicated origin (e.g. ‘Made in Australia’) engendered feelings of trust. More specifically, products from Australia were seen as safer than products from other countries. The generalisability of this qualitative finding requires additional testing.

An experiment in the USA (Wirth, et al., 2007), to analyse the value and importance of qualities of shrimp (including species, size, refrigeration state, price, production method, country of origin), revealed that country of origin labelling was valued the highest of all qualities. The product utility was reduced when the shrimp did not have a country of origin label. Questionnaire results from the study revealed that consumers felt that US shrimp were safer and of higher quality than imported shrimp. This study suggests that buying a product with a label from a trusted source may be more important to consumers than the country of origin label.

Country of origin is closely related to trust, with 80% of the participants in a study of British and Danish households (Wier et al, 2008), stating that their confidence in the quality of food products is greater when the producer is domestic. However, as has been mentioned above with respect to consumer ethnocentrism, confidence in COOL is not limited to trust in one's own country. In-depth interviews with industry experts and/or companies (Knight, et al., 2007) revealed that 'less risky' countries (e.g. New Zealand) were associated with high quality control and traceability.

Similar to the findings of the Oxford Evidentia review, the participants in the Citizens' Forums and Ipsos MORI study placed confidence in supermarkets, official and government sources, which they believed ensured the safety of food. This trust, however, did not extend to the official sources in other countries. UK consumers believed that the standards in other countries were not as rigorously upheld compared to the standards in the UK.

### **3.4.2 Ambiguity and misleading information on COOL**

The Oxford Evidentia review (Davies, MacPherson and Froud, 2010) found that too much information on food labels can lead to confusion, misunderstanding and uncertainty (Ngapo, et al, 2004; Mesias, et al, 2005; Gellynck, et al, 2006; Hu, et al, 2006, Pieniak, et al, 2007). It has been noted above that food labels about country of origin, traceability, and quality are not only ambiguous but can raise expectations about supposed superior quality, freshness and production methods that are not confirmed by the consumption of food products (Grunert, 2002). This, in turn, can lead to scepticism and mistrust of food labels.

Consumers involved in the BMRB research noted a lack of confidence in COOL when the labels were ambiguous or unlikely (e.g. the origin on the label seems counterintuitive). For example, products labelled 'Foreign produce packed in the UK' and 'Produce of more than one country' were not reassuring to consumers.

The study also mentioned consumer scepticism about the use of COOL in marketing a product. They felt that the label would be used to encourage the consumer to purchase a product because of its origin. This mistrust ties in with the mismatch between what consumers believe COOL represents and what it actually signifies (see section entitled 'Lack of Understanding About COOL'). This is also illustrated by products where the name suggests an origin, though the actual origin may be different *'Wiltshire ham is a curing process but some participants felt that it led them to believe that it was from Wiltshire'* (Stockley and Hunter, 2010: 18).

## **3.5 COOL Linked with Other Characteristics**

Associations and assumptions are made about country of origin labelling, and this is often linked to consumer understanding about what COOL represents.

Participants in the omnibus survey (NatCen, 2010) who looked for origin labelling (52%) were asked why they did so. The most frequently cited reasons related to issues of locality: preference for buying British/supporting British farmers (34%); food miles/distance food has travelled (17%); prefer to buy locally (17%). The consumer responses also related to issues of quality, safety and freshness: taste/quality (10%); fresher food (7%); hygiene (5%). Responses also referred to

ethical issues: animal rights/welfare (7%); fair trade (6%); human rights in the country where food is produced (4%); politics in the original country (3%).

### 3.5.1 Quality and safety: assurance

Loureiro and Umberger (2003) found that the official endorsement from the US Department of Agriculture (USDA) increased the credibility of the quality assurance label, though the willingness to pay a price premium for meat labelled as ‘Certified US’ was fairly marginal (2.5% to 2.9% above market price). Enneking (2004) found that in Germany, consumers would pay up to 20% more for meat with the Quality and Safety label, and suggests that quality “*certificates that aim to reduce information asymmetries in the food market prove to be influential on brand choice*” (Enneking, 2004:219). The BMRB study reported that quality marks, such as the Farm Assured Standards logo “*helped to reinforce the opinion that the food consumers ate was completely safe*” (Stockley and Hunter, 2010: 23). Participants in this study felt reassured that a product bearing this logo would conform to British production standards, which were perceived to be higher than the production standards of non-Western countries in products such as fresh meat. The study noted that the participants were less concerned about the safety of fresh fruit and vegetables than of meat, dairy or eggs.

The ‘Made in the EU’ label, however, does not appear to be specific enough for UK consumers, who would prefer to know the specific EU country in which the product was made (Food Standards Agency, 2000; MORI, 2000). Eden et al (2008) also found widespread scepticism about food assurance schemes amongst six focus groups in the UK, “*suggesting that a history of well-publicised problems in food and agricultural regulation in the UK have perhaps made scepticism the safest attitude*” (Eden et al, 2008: 629).

### 3.5.2 Local products = Quality products

Within the Ipsos MORI study, participants took part in 26 tasked shops in a Retail Lab (a simulated store used to analyse specific areas of food labelling) using field of vision glasses (20 shops) and eye-tracking (6 shops). Products labelled with ‘local’ designations had “*the conjecture of quality being inherent in ‘local’... from a widely held assumption that local products are the freshest, contain fewer preservatives, are farmed more ethically*” (Enright, Good and Williams, 2010: 31). The authors explain that the underlying belief is that local equates to fresher, more ethical food, which is natural and therefore more nutritious.

Further findings from the Ipsos MORI study identified a further assumption related to local products. This is that ‘local’ products are of better quality when purchased from a local source such as a butcher, compared to ‘local’ products from a supermarket. Many participants claimed to prefer to buy food – especially meat – from local sources. However, the findings from the filmed accompanied meals (which formed part of the home visits and interviews with the participants) revealed that most of the meat was purchased in supermarkets (mainly meat labelled as ‘British’). There appears to be a mismatch between what consumers would ideally like to purchase and what they actually purchase.

The participants involved in the Citizens’ Forums also associated local products with quality. The underlying assumptions were: food is fresher because it has not travelled as far, and that UK standards for production are higher than for other

countries. In particular, local meat was believed to be of higher quality and to have higher animal welfare standards.

The Citizens' Forums report addressed the issue of consumers' belief that local food is either too costly or too time consuming to source (as compared to inexpensive imported products available in supermarkets). The authors recommended that consumers be educated about "*cheaper ways to source local produce and expose the myth that it is always expensive*" (Stockley and Hunter, 2010: 30), and that supermarkets should be encouraged to increase the supply of local produce.

### **3.5.3 Local sources = Less ambiguity = More trustworthy**

During their participation in the Citizens' Forums, consumers were made aware of the method of determining the country of origin, and how this differed from their initial understanding of what COOL represents. The uncertainty surrounding COOL was somewhat alleviated when considering food from a local source: "*Farmers markets and local shops were seen as more trustworthy in providing more accurate information on origin and staff in these shops were perceived to be more knowledgeable about where the food came from*" (Stockley and Hunter, 2010: 27).

### **3.5.4 Environmental issues**

The participants in the BMRB Citizens Forums sample said that they were not always able to afford the most environmentally responsible products. The authors point out that this sample consisted of consumers on lower incomes who shopped at budget supermarkets. However, when these participants were able to purchase local products, they saw this as an added advantage (rather than driving the purchase decision) in that the product did not have as many food miles.

## **3.6 The Influence of Price and Willingness to Pay for COOL**

Price and the cost of food were identified by the four consumer studies as amongst the most frequently used labels influencing consumers' behaviour. The Oxford Evidentia review found that price frequently ranked alongside, if not above, country of origin, nutritional content, expiry date, and quality assurance labels as decisive factors in consumers' food choice (Ngapo, et al, 2004, Gellynck, et al, 2006, Hoogland, et al, 2007, Pieniak, et al, 2007, Sabbe, et al, 2009). The NatCen survey respondents stated that the most important pieces of information on a food label were best before/use by date and price (selected by 55% and 54% of the sample, respectively). When asked what information they look at when purchasing food for the first time, the highest response was price (30%). BMRB found that "*the information provided on labels ... that was most likely to have an effect on purchasing decisions was considered to be: the brand; sell/use-by date; product description, special offers and price*" (Stockley and Hunter, 2010:11). The Ipsos MORI study also found that brand, price and expiry date are what consumers want to see on food labels.

The evidence on price and willingness to pay for country of origin assurance, or for food quality assurance, is generally mixed. The Oxford Evidentia review found that whilst there is evidence that consumers will pay a premium for perceived superior foods in general, and assured country of origin foods in particular, this premium is generally rather modest. As has already been noted, meat consumers in the USA were only prepared to pay a price premium of 2.5% to 2.9% above market price for meat labelled as 'Certified US' (Loureiro and Umberger, 2005). Japanese

consumers were willing to pay a price premium on Japanese organic products of between 7.2% and 7.7% more than organic products imported from other countries (Kim, et al., 2008). Gellynck et al, (2006) found that no more than 10% of consumers in Belgium were willing to pay a price premium for meat with extra information about country of origin and traceability.

The Ipsos MORI study found that *“price can eclipse other aspects of the label, especially for lower income consumers”* (Enright, Good and Williams, 2010:4). The BMRB study of Citizens’ Forums also concluded that *“cost and value for money were central factors in making the decision where to shop”* (Stockley and Hunter, 2010:3).

On the other hand the Oxford Evidentia review found that in Spain price has *“ceased to be of great importance to the consumer, who now shows a preference towards a known origin of the beef, quality labelling, and a free-range production system”* (Mesias et al, 2005: 2493). The Ipsos MORI study also found that for the small group of respondents who were classified as ‘Detail Seekers’ price was secondary to the perceived quality.

The Oxford Evidentia review found that willingness to pay for perceived superior food products is also not as directly related to income and social demographic factors as one might expect, but is mediated by consumers’ value priorities and beliefs. Thus, people who have a commitment to local, organic and ‘natural’ methods of food production are likely to pay a premium despite their economic circumstances. Conversely, people with higher incomes, and who are less concerned about the perceived quality of home-country or regional origin, are more likely to avoid paying the premium for these products or the additional information that is offered about them.

An additional mediating factor, as identified in the Citizens’ Forums is the issue of time. The investment of time in searching for local products was cited as a barrier, for those who were too busy to do so as well as those who were put off by the extra effort involved. The authors noted *“Even when they could be bothered, value for money tended to influence them more than whether the product originated in the UK or elsewhere”* (Stockley and Hunter, 2010: 26).

The Ipsos MORI study also noted the role of consumers’ *“own set of individual values, associations and concerns”* (Enright, Good and Williams, 2010:31) as mediating factors between the message on food labels and their consequent behaviour. The Ipsos MORI study concluded that *“consumers engage with different elements to varying degrees due to the different lifestyle factors involved in their motivations for purchasing different food products”* (Enright, Good and Williams, 2010:41).

### **3.7 The Form and Content of COOL**

The Oxford Evidentia review, and both the BMRB and Ipsos MORI studies, found that consumers felt there was too much information on food packages, resulting in information overload. Participants in the Citizen’s Forums felt that labels not only had too much information but that the text was too small and difficult to read. The COOL was often not immediately obvious in this format. The study notes that *“once again, it would be preferable if the origin of the main ingredient was listed, or in the case of products containing meat, the main ingredient and the origin of the meat, if this was not the main ingredient”* (Stockley and Hunter, 2010:15). The Citizen’s Forums also raised the concern that some country of origin information

was so difficult to interpret (e.g. ‘produce of more than one country’) that the consumer was unsure about the exact origin.

The Ipsos MORI study found that *“some participants reported struggling with the volume of information provided on food packages suggesting that there was simply too much”* (Enright, Good and Williams, 2010:4). Moreover, *“the challenge is that different consumers think that different elements are superfluous, and that different individual elements constitutes overcrowding or overshadowing to different consumers”* (ibid).

The Oxford Evidentia review noted that *“A strong message from this review of the evidence is that food labelling on most products presents consumers with more information than they can reasonably process, resulting in information overload”* (Davies, MacPherson and Froud, 2010: 19). This review cited Sabbe et al’s (2009) *“observation that current formats of food labels are inadequate to facilitate information processing, especially under shopping conditions. Suggestions to improve the format of food labels include making them bigger, highlighted, and written in plain English”* (Davies, MacPherson and Froud, 2010: 16).

The issue of information overload, and whether this might require more targeted information about food products generally, and COOL in particular, is discussed in section 3.11.2 below.

### 3.8 What Consumers Want COOL To Include

When asked about what went into purchasing decisions, the Ipsos MORI study found that participants made reference to the images indicating origin (e.g. national flags) or labels with specific countries mentioned (e.g. British chicken, Scottish beef). The use of strong imagery (icons that do not include text) was also mentioned in the Citizen’s Forums. Consumers also felt that COOL should be displayed prominently so it is easily found. A further suggestion included the use of a standardised system for COOL. Having a familiar system included on a range of products could make it easier for consumers to understand the COOL information.

As has already been noted, the Citizen’s Forums findings suggested that the COOL should include information from the consumer’s perspective of origin, namely the birthplace/source or the country where the product is grown or reared.

A majority of the omnibus survey (NatCen, 2010) sample felt that the current COOL for meat and meat products is not suitable<sup>7</sup> (51%). Fewer (35%) responded that the COOL was suitable, and a minority (14%) were unsure about the suitability. The 51% who responded that the current COOL is not suitable and the 14% who were unsure were asked what the label should include. Participants could select more than one option. Over three quarters (76%) felt that the label should include ‘where the animal was farmed’. A smaller percentage (40%) believed it should include ‘where the food was processed’, ‘where the animal was born’ (40%), and ‘where the animal was slaughtered’ (35%).

### 3.9 The Appropriateness and Suitability of COOL Logos

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<sup>7</sup> The survey question reads: ‘Presently, the country of origin label for meat and meat products like bacon, sausages and pies is the place of last substantial change. For example, the place the animal was slaughtered for a pork chop, the place where sausages have been processed, or the place where a pork pie was manufactured. Do you think this information is, or is not, suitable when purchasing meat or meat products?’ Responses: Suitable; Not Suitable; Unsure.

The Citizen's Forums found that consumers misunderstand logos, believing them to be assurances of complete safety and country of origin. For example, when shown the Farm Assured Standards logo (Red Tractor<sup>8</sup>), participants thought that the origin of the product was British and met with British standards. However, the purpose of this particular logo is to inform about the standards of production.

The Oxford Evidentia review found that consumers might use logos to ensure the country of origin of ingredients, and that they would change their purchasing decisions in light of the information provided. A study cited in the Oxford Evidentia review, by Cruickshank (2005), found that *"80% of participating consumers believed that British eggs should be used in products such as mayonnaise, quiches or Yorkshire puddings. Additionally, 75% reported that they would check for the Best of British logo, and if the product were made with imported eggs, 40% would select a substitute"* (Davies, MacPherson and Froud, 2010:15).

### 3.10 The Uptake of the Food Standards Agency COOL Guidance

Tasked with the goal of assessing whether the FSA guidance on the country of origin labelling is being adhered to or not, the Campden BRI report presented findings based on the examination of 617 products. The labelling included explicit and implicit statements of origin for the products as a whole, as well as explicit and implicit statements of origin for one or more of the product ingredients. Examples of explicit labelling included 'produced in...', 'produce of...', and 'origin...', while implicit labels included pictures such as flags, assurance scheme logos, the use of words such as 'Oriental' or 'Authentic Italian Recipe', or colours associated with specific countries. Phrases on labels such as 'various countries' or 'more than one country' were coded as explicit statements of origin, though they did not identify a particular country. Of the 617 products, 515 included multiple ingredients for which there could be origin information about the component parts as well as the product as a whole.

With the products sampled as *"broadly representative of the various types of products available to consumers at retail outlets...collected throughout the UK"* (Leeks et al., 2010: 9), the authors presented the findings by type (e.g. meat, meat products, dairy products, etc). The findings presented included the frequency of the explicit provision of product origin information (more specifically the location of the last substantial change to the product), the frequency of an implied product origin, and the frequency of origin statements for the component parts of multi-ingredient products.

The highest percentage of products with explicit statements of origin was found on unprocessed meat products. The results showed that 97% of the 68 products sampled had such a statement (no findings were presented about the implied origin information for unprocessed meat). Fewer were found on the 334 meat products included in the survey, with explicit statements of origin for 75% and implicit statements were found on 37% of the products. The authors note that for both unprocessed meat and meat products, there was an increase in the provision of explicit origin information compared to the findings of a survey in 2005 which

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<sup>8</sup> The red tractor symbol only indicates that the product originated in the UK when the Union Jack is displayed in the background.

examined the same information. They suggest that the increase may be a “*continuing effect of the Agency guidance but may also be driven by media campaigns that consumers should be given clearer information on this point*” (Leeks et al., 2010: 5).

The authors point out that as the origin information is a description of the last substantial change to the product, “*these product origin declarations are not in all cases the information that consumers value the most*” (Leeks et al., 2010: 5). Origin statements were therefore examined in relation to the component ingredients. There were details of explicit origin for the ingredients in 44% of the 334 meat products. The majority of the explicit origin information consisted of country, region or area of origin. For only 6% of the meat products with multiple ingredients, information about the farm of origin (where the animal was reared) was supplied. The report stresses that the provision of information about where the animal was born, raised and slaughtered would be considerably more detailed than identifying the farm of origin.

As for the 101 dairy products surveyed, 68% of the products included an explicit statement of origin and 32% included implications of origin. Of the total dairy products examined, 76 included multiple ingredients. Of these, 9% displayed explicit statements of origin for the ingredients and 8% included implicit ingredient origin information.

The authors pointed out that the sampling numbers for fish products, vegetable products, fruit products and sandwiches were too small to analyse in detail. The results should be treated with caution.

Of the 34 fish products sampled: 74% provided explicit origin information and 9% included implied origin. The findings showed that the countries of origin for the fish products were mainly countries other than the UK. The authors suggested that this finding may reflect the fact that “*many species are not available in UK waters*” (Leeks et al., 2010: 5). Nearly all of the fish products consisted of multiple ingredients (32 of 34). Of these, 50% included explicit information about the origin of the ingredients and none had implied origin for the ingredients.

There were 35 vegetable products, of which 66% included an explicit origin and fewer than a quarter (23%) had an implication of origin. Almost all (31 out of 35) vegetable products had multiple ingredients, of which 13% provided an explicit statement of ingredient origin and none included implied origin.

35 fruit products were analysed: 63% of the fruit products had explicit and 6% had implied origin. 23% of the 30 multi-ingredient products had explicit ingredient origin stated, and very few included implied origin for the ingredients. The findings relating to fruit showed that labels indicated the greatest number of origin sources to be foreign, attributable to the fact that “*many fruits eaten in the UK cannot be sourced locally*” (Leeks et al., 2010: 32). With fruit, the most frequently used phrase was ‘Packed in ...’, reflecting its most substantial change is different to that of other products.

Finally, a small number of sandwich products were sampled (10, all of which included multiple ingredients): 70% included explicit origin information and 40% had some explicit origin information about the ingredients.

To summarise the 617 products overall (including the product types with small samples), 75% included explicit origin information (and of these, 50% provided such information in the absence of implied product or ingredient origin). Of the total products, 32% had origin implications. For the 515 products with multiple ingredients, 36% had explicit origin information about the ingredients and 9% included implied information about origin.

The most frequently used phrase (found on 39% of products assessed) to indicate product origin was ‘Produced in...’. More specifically, the most commonly identified origin location was the ‘UK’, cited on 42% of all products. The authors note that this is “*twice as often as all specific country references put together*” (Leeks et al., 2010:33).

### 3.10.1 Commonalities with Consumer Studies

Though this study differed from the other four FSA-commissioned studies in that it did not include the behaviours and perceptions of consumers, it is possible to identify some common themes. For example, the high rate of prevalence of products labelled with ‘UK’ as the origin found in this study may resonate with consumers such as those which took part in the Ipsos MORI study. The designation of ‘UK’ was perceived as ‘local’ by the Ipsos MORI participants and therefore associated with quality.

In relation to the implied origin labelling reported in the Campden BRI study, the Citizens’ Forums found that icons such as flags were helpful as a way of identifying origin. In addition, quality assurance logos (which were also coded implied origin labels) were identified by studies included in the Oxford Evidentia evidence review as being influential in terms of willingness to pay for a product. Therefore, the findings by Campden BRI on implied origin labelling may show that there are products available with COOL characteristics valued by consumers.

The presentation of COOL information is another example of a cross-over of themes between the FSA studies. Though the coders on the Campden BRI study gave high scores for clarity of product origin statements, of those that were deemed unclear, the most frequently mentioned issue was small font size. The size of text is a finding echoed by the Citizen’s Forums study and the Oxford Evidentia evidence review.

Although they did not identify a particular country, phrases such as ‘various countries’ or ‘more than one country’, were considered by Campden BRI as statements of origin. Participants in the BMRB found this type of non-specific statement of origin to be unhelpful. Given the high proportion (75%) of products with explicit statements of origin identified by the Campden BRI report, this may represent a conflict between what consumers want in terms of COOL and what is actually available in stores. However, it should be noted that the phrase ‘Produced in...’ was the most frequently used expression of origin “*being used on over three times as many products as any other expression*” (Leeks et al., 2010: 33).

### 3.11 Commonalities around General Food Labelling

Separate from the findings relating directly to COOL, there were common themes in the four consumer studies that were associated with general food labelling. These included: values influencing general food labelling behaviours, the varied value priorities held by consumers, and the importance of use-by/best-before labelling.

#### 3.11.1 Values influencing general food labelling behaviours

Results from a Swedish study (Grankvist et al, 2007) suggest that there are certain consumer values (see below) that play a role in food purchasing behaviour. Furthermore, a Dutch study (Hoogland et al., 2007) suggested that the information on packaging will not necessarily change the purchasing behaviours of consumers if they do not already hold the values that relate to the labelling. Another study (Lyne et al, 2009) reported that consumers' attitudes/values do not always translate into action (i.e. purchasing the food). The Ipsos MORI study found that filmed meals in participants' homes yielded evidence of actions differing from claimed attitudes, "...participants may say during the cooking of a meals, but after the use of labelling had stopped, "I don't buy 'value' labelled goods" however the researcher may discover value flour in the cupboard" (Enright, Good and Williams, 2010: 50).

In terms of values, for example, consumers may seek information about the safety and security of food products, or they are interested in: ethical labelling (fair trade, sustainable development; environmental responsibility, animal welfare etc.); the presence of genetically modified ingredients; organic production. The Oxford Evidentia review noted that searching for such information is "*influenced by the values, 'reference points' and particular characteristics of consumers. These include the purposeful nature in which these consumers go about searching for information on food labels ('active searching'), and the ways in which they process and retain the information that they find*" (Davies, MacPherson and Froud, 2010: 18).

The behavioural study by Ipsos MORI found that consumers with a particular concern (e.g. special dietary requirements, concerns about quality) play a role in behaviours related to food labelling. The study also identified a group, which they labelled as 'Detail Seekers', who were particularly interested in the quality and nutritional content of the food - a central motivator of this group of consumers, often despite the price. Though this group did not vary from the other participants in terms of the amount of time spent observing labelling (measured by the eye tracking), they recounted the reasoning behind their selection in greater detail.

#### 3.11.2 Information overload: Catering for varied value priorities

As stated above, the quantity of information on food labels has been found to lead to confusion. The authors of the Ipsos MORI behavioural study explain that the difficulty in simplifying the labels is related to the fact that different aspects of the information are valued differently by different consumers. "*The main implication of the research is that all aspects of food labelling are important to 'someone', but no aspects are equally important to everyone. This means that it is virtually impossible to advise on improvements to the content and format of existing food labelling*" (Enright, Good and Williams, 2010: 41).

This is echoed by the Oxford Evidentia review, which cited a study that concluded as follows: "*It has long been understood, however, that the presupposition that*

*consumers want, will acquire and, having acquired, will adequately understand and use the information supplied on labels is invalid” (Gellynk, et al, 2006:163). Banterle and Stranieri (2008) suggest that it is important to understand which kind of information is of interest to the consumer (which has been shown above) is likely to vary according to consumers’ reference points’ and ‘value priorities’. This is further explored by Verbeke et al (2007), who stated that “information is more likely to result in attitude change and subsequent behaviour change if the perceived personal relevance is high” (Verbeke et al., 2007:6). One proposed solution to selecting relevant information may involve “segmenting the population according to their information needs and developing information with high levels of personal relevance to specific groups of respondents, who may be at greater risk than the rest of the population” (ibid). However, this is not only costly and impractical in terms of food labelling, but it takes the provision of information away from food labels and into other means of communication, such as information campaigns organised by government, business or civil organisations (Hoogland, et al, 2007).*

### **3.11.3 Expiry / Use-By / Best-Before Dates**

*As has been noted in footnote 5 above “the expiry date of food, though referred to extensively in the literature, is not a term routinely used in the UK. Rather the terms ‘use by’ and ‘best before’ are used in the UK, due to requirements of UK law. Both labels are there to provide the consumer with information to make safe and optimum use of the food. The former label indicates to consumers the date beyond which food should not be consumed for food safety reasons. The latter is an indication of food quality and signifies to the consumer that food may not be at its best quality after this date, however it will not necessarily be unsafe to eat. Retailers may also use another date mark (‘display until’) which is primarily for retailers’ display shelves to help manage their stock” (Davies, MacPherson and Froud, 2010: 12).*

A study cited in the Oxford Evidentia review investigating consumer behaviour in relation to food safety and risk information (Verbeke et al., 2007) noted that “interest has been shown to be much higher for other information cues like readily interpretable indications of quality such as certified quality marks or seals of guarantee, as well as for mandatory standard information like expiry date” (Verbeke et al, 2007:5). Research (cited in Charles, 2002) from the IGD investigating logos (environment, animal welfare, origin and fair trade) found that 70% of consumer purchasing decisions are based on price, taste and use by/best-before date alone.

The Oxford Evidentia review also outlined the variation in the importance of different aspects of labelling information for several international countries. Bernues, et al. (2003) identified considerable distinctions: “*Italian and French consumers attached comparatively more importance to the production system, traceability and quality controls, whereas for Spanish consumers, information about the nutrition and maturation of meat was very important, as was the country of origin and expiry date*” (Davies, MacPherson and Froud, 2010: 3). A further study (Tessier et al, 2000) reported that use-by dates were the most commonly sought information by Scottish consumers. This included labels on a wide range of food products. Several studies (Peters-Teixeira and Badrie, 2005; Pieniak et al, 2007; and Sabbe et al, 2009) identified expiration date as commonly used by

consumers in Trinidad, Belgium and Spain as an indication of freshness, shelf life and food safety across a range of foods. Specific to meat labels, a number of studies (Bernues et al, 2003; Gellynck et al, 2006; Verbeke et al., 2002; Verbeke & Ward, 2006) all found that expiry date and use-by date ranked alongside country of origin as the most important information.

Illustrating the importance of this aspect of food labelling, when given thirteen options of food information and asked to choose the three they felt were most important, 55% of the NatCen (2010) survey respondents selected 'best-before/use-by'. This information was the most frequently selected, followed closely by 'price', which was selected by 54% of the consumers.

Though consumers attach a great deal of importance to date labels, the evidence reveals a misunderstanding of what terms such as 'use by' and 'best before' actually signify. A survey included in the Oxford Evidentia review found that when 3,515 UK consumers were asked about the information on food labels, 28% interpreted the term 'use by' incorrectly, believing it to mean 'past its best but not necessarily unsafe' (FSA, 2007: 41). The same survey also revealed misinterpretation about the term 'best before', with 37% of respondents believing that the product could not be safely eaten after this date.

The Ipsos MORI study reported that the label information valued by all consumers is the 'use-by/ best-before' date. However the findings also showed that 'use-by' and 'best-before' are frequently confused by the study participants. This confusion was revealed when some participants were concerned by the possibility of eating food that is no longer safe to eat, or when they discarded food after its 'best before' date, though it was still safe to eat. The participants gave more significance to 'use by' and understood it to mean that it is the date when a food product spoils and should not be eaten after that date.

Information from the Ipsos MORI eye tracking trips to the store, and filmed meals in the participants' homes, revealed a discrepancy between what the consumers say is important in terms of date labelling compared to their actual behaviour. The attention to dates-for-use given to products in stores (searching for the freshest product available) is more relaxed when the food is being prepared in the home. However, at home, the participants were more likely to check the dates on products that they have purchased for the first time (compared to habitually used products).

Like the Ipsos MORI participants, the consumers taking part in the BMRB Citizens' Forums also used 'sell by' and 'use by' information to make purchasing decisions. They also reported looking for dates furthest away to ensure they were purchasing the freshest products with a short shelf-life.

## 4 Conclusions

Country of origin food labelling has generated a number of issues, the complexity of which makes conclusions and policy implications less than straightforward. First, this synthesis has shown that for consumers it is far from clear what ‘country of origin’ refers to. The evidence from the studies reviewed in this report would suggest that most consumers take country of origin to refer to the place where food products are born/grown and raised/harvested, rather than ‘the place of last substantial change’. The potential for country of origin labelling to mislead consumers has been recognised by the Food Standards Agency (FSA) in its guidance on country of origin labelling. The FSA notes that *“if the place that is declared as the origin of the food (according to the principle of last substantial change) is not the same as the place of origin of its primary ingredients, in order not to be misleading it may be necessary to provide information on the origin of those ingredients”* (Food Standards Agency, 2009:7-8).

Second, there is some evidence from this synthesis that regional and local areas can be more significant to consumers in terms of the safety, hygiene and quality of food, than the nation state within which they are located. In the UK context, sub-national labelling can also be of importance to consumers who look for the constituent country of the UK (e.g. Scottish beef, English butter, Welsh lamb etc) on a label, rather than the generic label ‘Country of Origin:UK’. This also raises questions about the value and/or relevance to the consumer of terms ‘product of’ and ‘produce of’, although it is noted that there are currently discussions on origin labelling rules in Brussels.

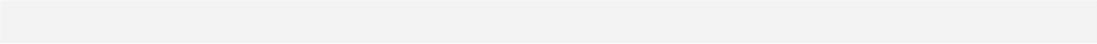
Third, and closely related to what consumers understand by country of origin, this synthesis has identified an association between the ‘traceability’ of food products and country of origin labels. The most common meaning that consumers attach to the word ‘traceability’, if they are aware of it at all, is the ability to trace *“the origin, production process and product information of food”* (Kehagia, et al, 2007:401). This synthesis, however, has found a number of different interpretations of the term ‘traceability’ across different countries, which in turn may confound consumers’ understanding of the term ‘country of origin’. Furthermore, there is some evidence that traceability information and country of origin labels may be less important for consumers than other information cues such as certified quality marks, seals of guarantee, national flags/emblems and, especially, use-by/best-before dates.

Fourth, this synthesis has identified that country of origin indicators or labels have a degree of ‘food nationalism’ associated with them. This refers to the belief that one’s own country or region produces safer and better food than other countries or regions. This synthesis has found that country of origin seems to have an association with local origin of food and the quality of food production, regardless of independent evidence of food quality or safety. This synthesis has also noted that country of origin can be used by consumers for geo-political purposes or to avoid negative connotation about quality, such as avoiding foods labelled ‘Made in South Africa’ in the 1980s, and those that indicate that corned beef is from China.

Fifth, this synthesis has indicated that consumers’ values and beliefs often act as mediating factors between information provided by food labels and consumers’

food purchases. Thus, the synthesis has found that consumers with a particular concern (e.g. special dietary requirements, beliefs in organic or vegan food) play a role in behaviours related to food labelling. Similarly, people who have been described as 'Detail Seekers' will either seek foods with specific country of origin labels, or will disregard such labels, depending on whether or not they align with their values and beliefs about food products. Other consumers use COOL to make decisions about food purchases based on ethical principles about different countries' standards of animal welfare, human rights and/or environmental policies (including use of bio-technologies). COOL is increasingly being used by some consumers to establish the distances involved in the distribution of food products by air, sea and land, thereby revealing their concerns about environmental pollution. At the same time, consumers who are concerned about the economic conditions of food producers and farm workers in developing countries will purchase food products from countries far away, especially if they display fairtrade labels.

Sixth, this synthesis has indicated that price may be the most important label on food products for many consumers. At the same time there is evidence that willingness to pay for specific ingredients, modes of production, or country of origin is considerably variable across the economic spectrum. It has also identified that the price premium that consumers are prepared to pay for food quality, production and country of origin is generally rather modest.



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## **Annex A – Research Methods of the Five Studies**

### **Oxford Evidentia Evidence Review (Davies, MacPherson, and Froud, 2010)**

The project undertaken by Oxford Evidentia was a review of 132 scientific articles on public attitudes towards, and use of, general food labelling. The review used the principles of systematic reviewing, which include extensive searching of electronic, print and grey literature sources, critical appraisal of each study (in which high quality studies are included and low quality studies are excluded), systematic data extraction of the findings of each study, and analysis of the key themes and range of findings.

The Oxford Evidentia study reports on the influence of food labelling on consumers' purchasing decisions; consumers' use of country of origin labels on food products; and variations in consumers' demands for, understanding, and use of general food labelling.

**Strength of study:** international evidence about general food labelling (including COOL).

**Limitation of study:** yielded limited evidence of observed consumer behaviour.

### **BMRB Study of Citizens' Forums (Stockley and Hunter, 2010),**

The project undertaken by BMRB was a nationwide series of consumer forums to enable the FSA to establish an ongoing dialogue with the public on food standards. The forums were designed to help the FSA focus on, and ultimately the advice it gives, from a consumer perspective.

A series of six workshops across England were convened over two waves. Each workshop comprised 10 participants who were identified at recruitment as being on lower incomes and shopping at budget supermarkets or buying budget brands. Each workshop lasted 2 hours.

The first wave of workshops focused on shopping habits, the importance of labels on food, and country of origin labelling. Participants were then given 'homework' to find products with clear and unclear COOL information on the packaging to bring in for group discussion. The second wave of workshops examined: whether country of origin labelling can help consumers make informed choices; food safety and country of origin labelling; purchasing locally sourced and British food products, and reflections on discussion and priorities.

**Strength of study:** in-depth exploration of issues related to COOL; deliberative research; broad range of issues discussed.

**Limitation of study:** focus only on COOL (not general food labelling); findings are based on participant report rather than observation.

### **Ipsos MORI Qualitative Study of Consumer Use of Food Labelling (Enright, Good and Williams, 2010),**

The qualitative study undertaken by Ipsos MORI investigated what main shoppers think about and refer to when shopping for habitual and first time purchases, and how they behave according to the format and usability of food labels.

The Ipsos MORI study used “*eye-tracking technology as a way of discerning what food packaging information shoppers really look at in a real world setting rather than relying on what they say they look at*” (Enright, Good and Williams, 2009:9). Research was carried out in five stages:

- 15 eye-tracked accompanied shopping trips (in real life context)
- 36 eye-tracked shopping trips (in real life context)
- 15 filmed accompanied meals (ethnographic home visits and interviews)
- 20 eye-tracked tasked shops in Ipsos MORI’s Retail Lab, and 6 ‘follow-up’ eye-tracked tasked purchases
- Semiotic & packaging analysis – a method that looks at labels as signs and symbols that convey messages about the social cultural meaning of food.

The Ipsos MORI sample included ‘main shoppers’ in households, including men and (mainly) women, living in urban and rural areas, and at ‘pre-family’, ‘family’, and ‘post-family’ stages of life. The study was undertaken in a mix of different stores (Tesco, ASDA, Co-Op, M&S), and involved a range of shopping missions. The sample comprised a mix of social-demographic backgrounds and ethnicities.

**Strength of study:** focus on general food labelling (including, but not restricted to, COOL); studies actual food purchasing behaviour (not just participants’ claims about food purchasing)

**Limitation of study:** The eye-tracked shopping in the Ipsos MORI Retail Lab may not replicate ‘real-life’ purchasing completely.

### **NatCen’s Omnibus Survey including Country of Origin Questions (NatCen, 2010).**

NatCen asked a range of questions about country of origin labelling to a UK wide representative clustered random probability sample of 1601 adults that constitute its regular omnibus survey. The questions posed by the NatCen survey included:

- Information usually looked for when purchasing food for the first time
- Information most important on a food label
- Whether respondents look for country of origin on food products
- Which products is country of origin looked for
- The importance of country of origin labelling
- Why respondents look/do not for country of origin labelling
- On which food products should country of origin be provided
- Respondents’ understanding of country of origin labelling
- The suitability of the current origin label

- What the country of origin label should represent/include

**Strength of study:** large sample size representative of population; robust sampling method; questions dedicated to COOL; statistics illustrate relative importance of issues to the participants.

**Limitation of study:** responses based on reported not observed behaviours; no multivariate analysis of demographic characteristics and responses.

**Campden BRI Survey of UK-Marketed Products on the Uptake of FSA guidance on Country of Origin (Leeks, Lawler, Monadjemi and Wood, 2010).**

The survey undertaken by Campden BRI was of 617 food products purchased from over 60 major supermarkets, convenience stores, discounters and co-ops located throughout the UK. The authors explain that *“400 samples were meat and meat products, avoiding unprocessed beef and veal, where origin marking is required by law, as well as products bearing protected European Union names. The remaining 200 samples were of dairy, vegetable, fruit, fish origin plus sandwiches”* Leeks, Lawler, Monadjemi and Wood, 2010:4).

- The food samples gathered by Campden BRI were photographed, with particular attention being given to their labels.
- Each label was then assessed by independent assessors to determine the extent to which the FSA guidelines on country of origin labelling had been followed.

**Strength of study:** broadly representative sampling of products collected throughout the UK, full range of packaging formats, and market share of store label and branded products.

**Limitation of study:** consumer information not included.