

A close-up photograph of two thick, grilled salmon fillets. The salmon has a golden-brown, slightly charred skin and a moist, white interior. It is garnished with a sprinkle of red chili flakes. In the background, there are blurred green and red vegetables, possibly broccoli and tomatoes, on a white plate.

PGI Accreditation Research

Our Ref: BF19305

STRAT7 BonamyFinch 

Contents

Quantitative consumer research programme carried out on behalf of GAPP for their application for Protected Geographical Indication for Alaska Pollock in the EU

This report summarises the key findings across the five European countries in which the research was conducted

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- 03. Awareness levels of fish species
- 04. Perceptions of Alaska Pollock
- 05. Importance of Origin
- 06. Importance of Sustainability

Research Overview

Data was collected online by Research Bods via consumer access panels

Online data collection methodology

- Data was collected online via consumer access panels
- High internet penetration in all markets as indicated below allowed for representative online interviewing:

Internet penetration (% of population)

- Germany: 96%
- UK: 95%
- France: 92%
- Netherlands: 96%
- Belgium: 94%

<https://www.internetworldstats.com/stats4.htm>

Estimates for June 30 2019

Fieldwork carried out by Research Bods

- Fieldwork was conducted by Research Bods, Bonamy Finch's strategic partners for online panel provision and an MRS award winner for its approach to panel recruitment and quality
- Research Bods' UK panel has 300,000 members and is rated #1 of 120 UK panels for user experience
- It provides instant access to a global audience, spanning 85 countries and 110 million consumers
- All respondents across both proprietary and partner panels meet the same rigorous quality checks to ensure both consistency and compliance with regulatory bodies:
 - Quality checks: including email verification, geographical and machine checking
 - Double opt-in
 - ISO 27001 accredited

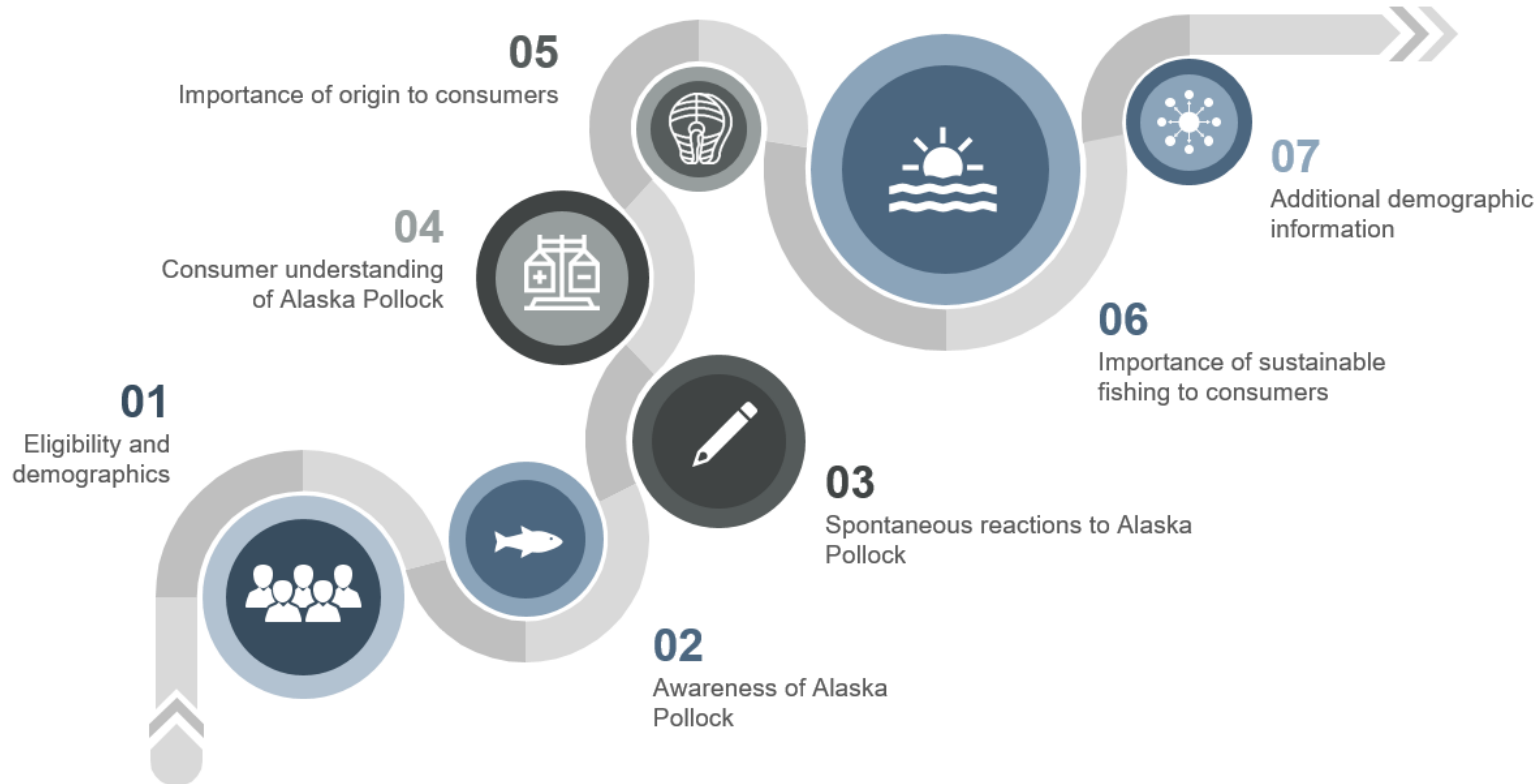
A representative sample of 1000+ consumers interviewed in each market 23-31st July

We applied light weights to the sample to ensure it is representative of non-rejectors of fresh/ frozen fish

		Belgium	France	Germany	Netherlands	UK
		N=1001	N=1024	N=1015	N=1023	N=1012
Gender	Male	50%	49%	50%	50%	50%
	Female	50%	51%	50%	50%	50%
Age	18-24	15%	15%	14%	16%	16%
	25-34	17%	16%	17%	17%	18%
	35-44	18%	17%	17%	16%	17%
	45-54	18%	19%	20%	19%	18%
	55-64	18%	18%	20%	18%	17%
	65+	14%	15%	14%	15%	14%
Income	<€/£20K	23%	31%	26%	29%	22%
	€/£20K-€/£30K	13%	17%	11%	12%	22%
	€/£30K-€/£50K	29%	33%	27%	27%	26%
	€/£50K+	23%	15%	31%	21%	21%
	Not stated	11%	4%	4%	11%	8%

Questionnaire Flow

Overview of questionnaire



- Concise questionnaire of 7 minutes, focussed on addressing the key business objectives
- The survey was translated into local languages by a native speaker of that language. Each translation was proof-read by a separate native speaker and reviewed by a central quality control linguist
- Data was cleaned to ensure the final sample is comprised of high quality data, usable for analysis

Single questionnaire structure, consistent across countries, optimised for completion on smartphone and tablets

Executive Summary

Summary of findings



Fish Specie Awareness

- The majority of consumers are aware of Alaska Pollock
- Levels of awareness vary across countries, from 55% in the Netherlands to 88% in Germany



Spontaneous Reactions to Alaska Pollock

- Spontaneous thoughts when seeing term 'Alaska Pollock' are broadly positive. Strongest associations with taste & freshness, particularly in Germany. Alaska provenance is stronger in the four other markets



Reactions to Alaska Pollock name

- Over half of consumers believe that the Alaska Pollock name says something about the origin of the fish, either the place where it came from or from where it was caught.



Perceptions of Origin

- Consumers are more likely to believe that Alaska Pollock can only be caught in Alaskan waters vs any other waters



Importance of Origin

- At least two thirds of consumers believe the origin of the fish is important in their purchase decision making process and the majority also expect to see this information on the label



Alaska vs Russia Origin

- The majority of consumers believe that Alaska Pollock should be or would prefer it to be caught in Alaska waters and would feel negatively if they discovered it was caught in Russia
- Feeling misled is the top reaction in Belgium, France, Netherlands and UK and the second highest response in Germany



Sustainability

- The overwhelming majority of consumers want their fish to be sustainably sourced
- Over half of consumers, and in France the vast majority, believe that regulations for fishing producers are very important

Executive Summary (i)

- Alaska Pollock occupies slightly different positions across the 5 markets covered in this research. It has strong awareness levels among consumers in France and Germany, within touching distance of the most familiar species. In Belgium, UK and particularly the Netherlands, however, while at least half of consumers are aware of Alaska Pollock, it trails behind other popular fish species.
- Spontaneous perceptions of Alaska Pollock are broadly positive, however, particularly in Germany where taste and freshness are mentioned by many. After this initial positive perception, the origin of Alaska Pollock is then next most frequently mentioned reaction among consumers.
- Additionally, the majority of consumers in each market feel the name Alaska Pollock tells them about where the fish was caught, or where it came from.
- More than half of consumers (and nearly two-thirds in the UK) believe that Alaska Pollock can only be caught in Alaskan waters.
- Of those who think it can be caught in multiple waters, the majority feel it can be caught in Alaskan waters, followed by Russia.
 - Among those not mentioning Alaska as a source of Alaskan Pollock, the majority (60%+ in all markets) did not know where it was sourced.

Executive Summary (ii)

- Over two-thirds of consumers in all markets believe the origin of the fish is important in their purchase decision making process. In Belgium and Germany this figure is over 75%, and in France it is 93%.
 - The majority of consumers in all countries expect to see the origin information on the label.
- Concern about the origin of the product translates directly into consumer preference. Over half of consumers in Belgium, France, Germany and the UK feel that Alaska Pollock should either be caught in Alaska waters only, or would prefer it to be so.
 - Only the Netherlands are an outlier, with 50% of consumers not caring where there fish is caught. The balance for the most part believe as the other countries that Alaska Pollock should come from Alaska or prefer that it does.

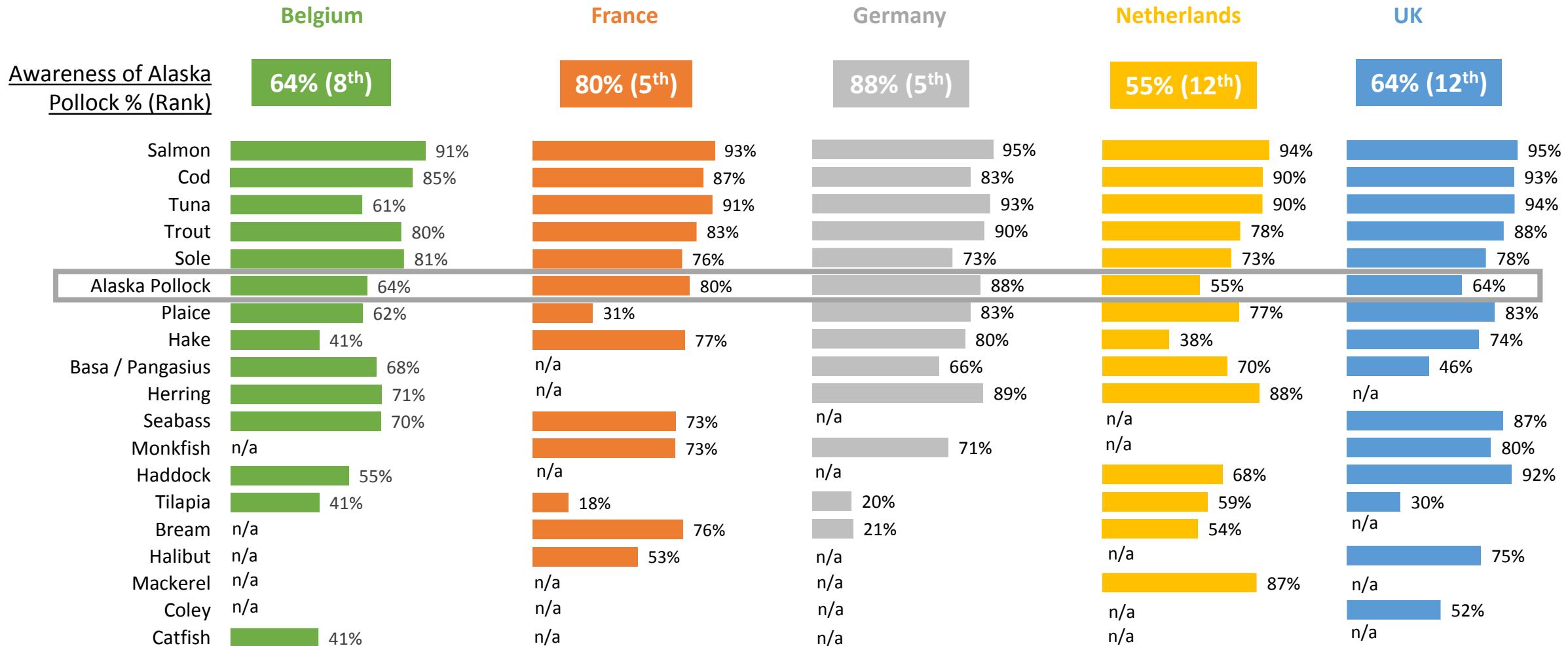
Executive Summary (iii)

- When being informed that Alaska Pollock can be caught in Russia, the dominant emotion in 4 of the 5 markets is of being misled. In fact, more consumers in these 4 markets mention a negative emotion, than a positive or a neutral emotion.
 - In Germany the picture is slightly different; Germans were more likely to be ‘informed’(rated highest) and then ‘misled” (rated second highest).
 - Among those who thought Alaska Pollock can only be sourced in Alaska, negative emotions are higher.
- There are very strong levels of support for sustainable fishing across all countries but particularly in the UK and France. Consumers in the Netherlands are slightly less enthusiastic, but the vast majority of consumers here are also still in favour of sustainable fishing.

Awareness of Fish Species

Awareness of Alaska Pollock

Levels of awareness of Alaska Pollock are strongest in Germany and France, in the three other countries, Alaska Pollock awareness falls in the second tier.



Base: All respondents left to right (1001, 1024, 1015, 1023, 1012)

Source: Q1 Familiarity

Consumers Perceptions of Alaska Pollock

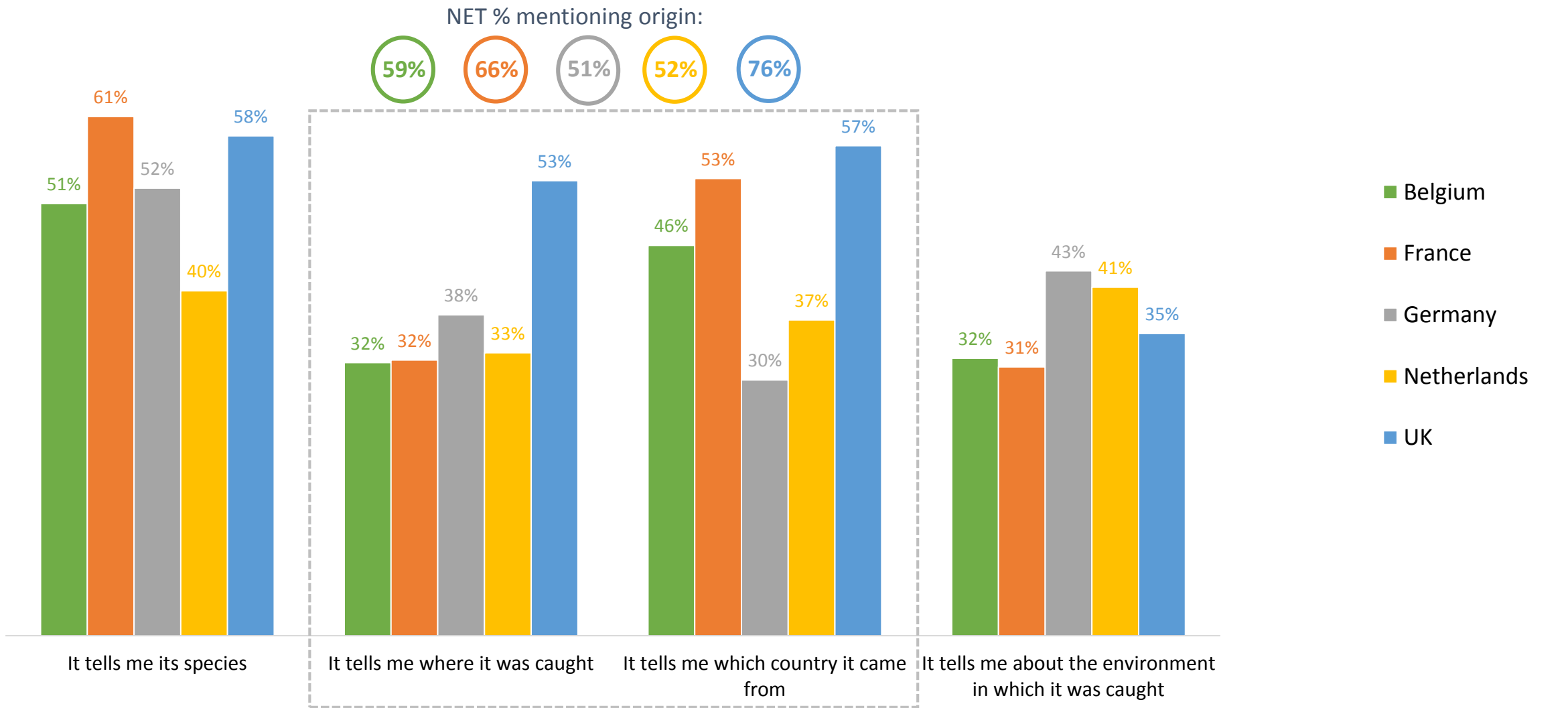
Spontaneous thoughts about Alaska Pollock

Spontaneous thoughts when seeing term 'Alaska Pollock' are broadly positive. Strongest associations with taste & freshness, particularly in Germany. Alaska provenance is stronger in the four other markets.

	Belgium	France	Germany	Netherlands	UK
Positive comment about the taste / freshness	21%	20%	44%	22%	23%
Type of white fish	17%	17%	3%	22%	17%
Comes from Alaska	14%	15%	7%	18%	20%
Usually comes breaded / as fish fingers	8%	13%	12%	8%	4%
Good value and less expensive than other types of fish	10%	6%	8%	7%	11%
Usually comes frozen	11%	9%	8%	10%	4%
Similar to Cod and Haddock	7%	2%	3%	5%	16%
Healthy type of fish	3%	3%	13%	6%	5%
Easy to cook with	5%	5%	9%	6%	3%
General comment that pollock is a type of fish	5%	7%	2%	3%	5%
Good quality	2%	4%	5%	1%	5%
Comes from America / far away	4%	4%	3%	3%	3%
Popular / easy to find	2%	3%	6%	2%	3%
Sustainable alternative to other types of fish	2%	3%	3%	2%	6%
ANY mention of Alaska in spontaneous mentions	15%	17%	14%	23%	23%

Reactions to Alaska Pollock name

Over half of consumers believe the Alaska Pollock name says something about the origin of the fish, either where it is caught or the country from which it is from

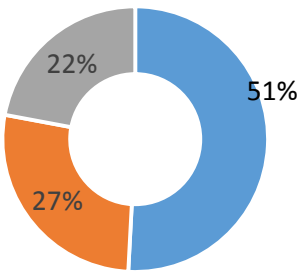


Importance of Origin

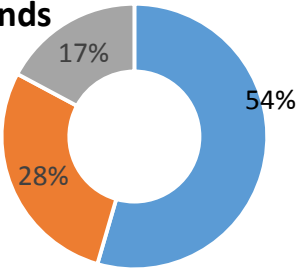
Perceptions of origin

The majority of consumers in each country believe that Alaska Pollock can only be caught in Alaskan waters. Among those who think it can be caught in different waters, over half mentioned Alaska as well as other waters.

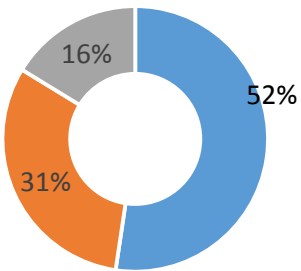
Belgium



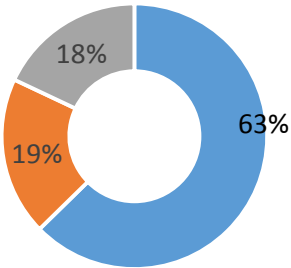
Netherlands



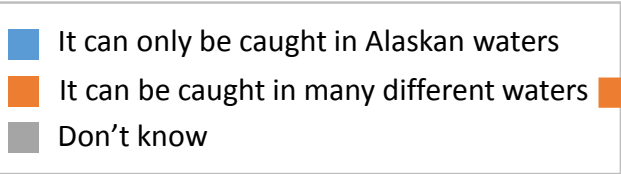
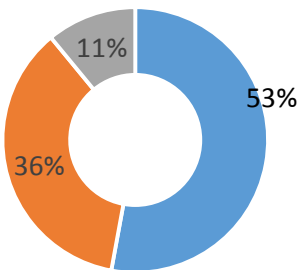
France



UK

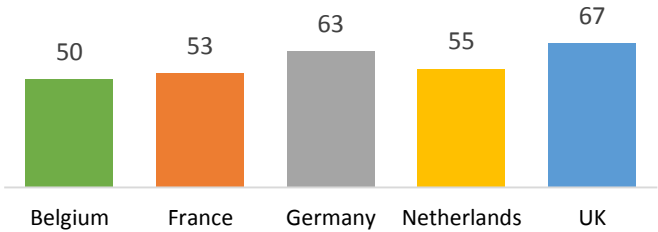


Germany

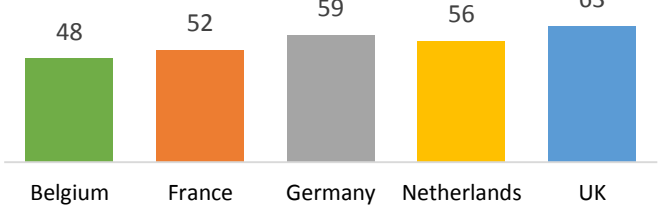


Which waters can Alaska Pollock be caught in:

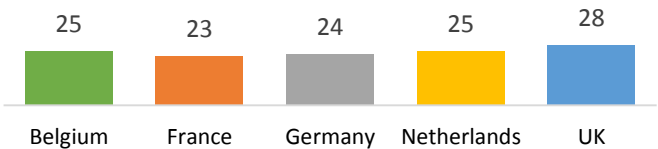
% Alaska



% Russia



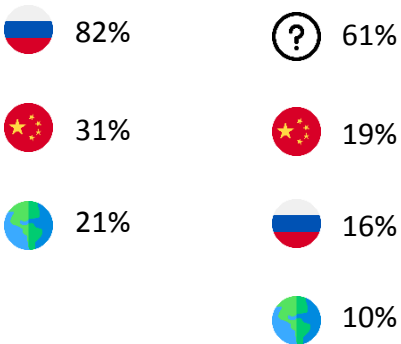
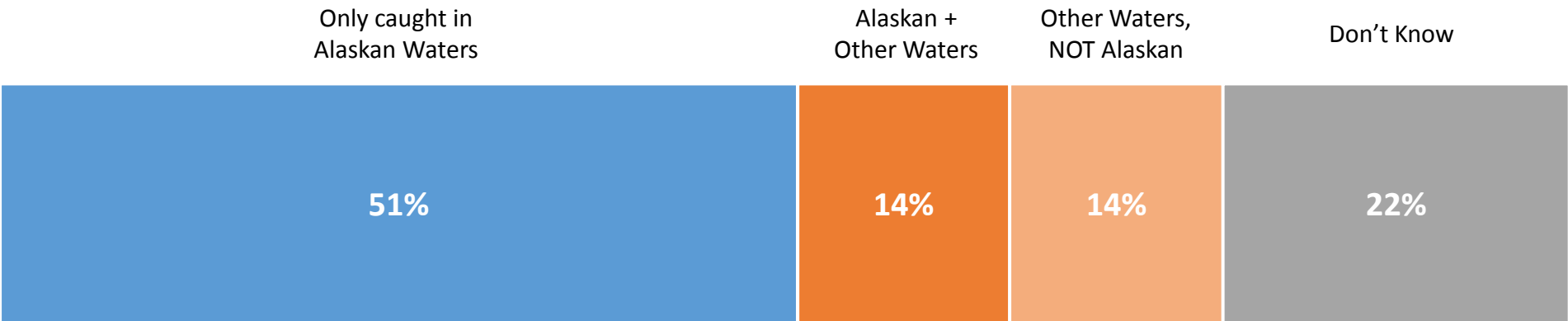
% China



Asked only of those who believe Alaska Pollock can be caught in many different waters

Perceptions of origin breakdown - Belgium

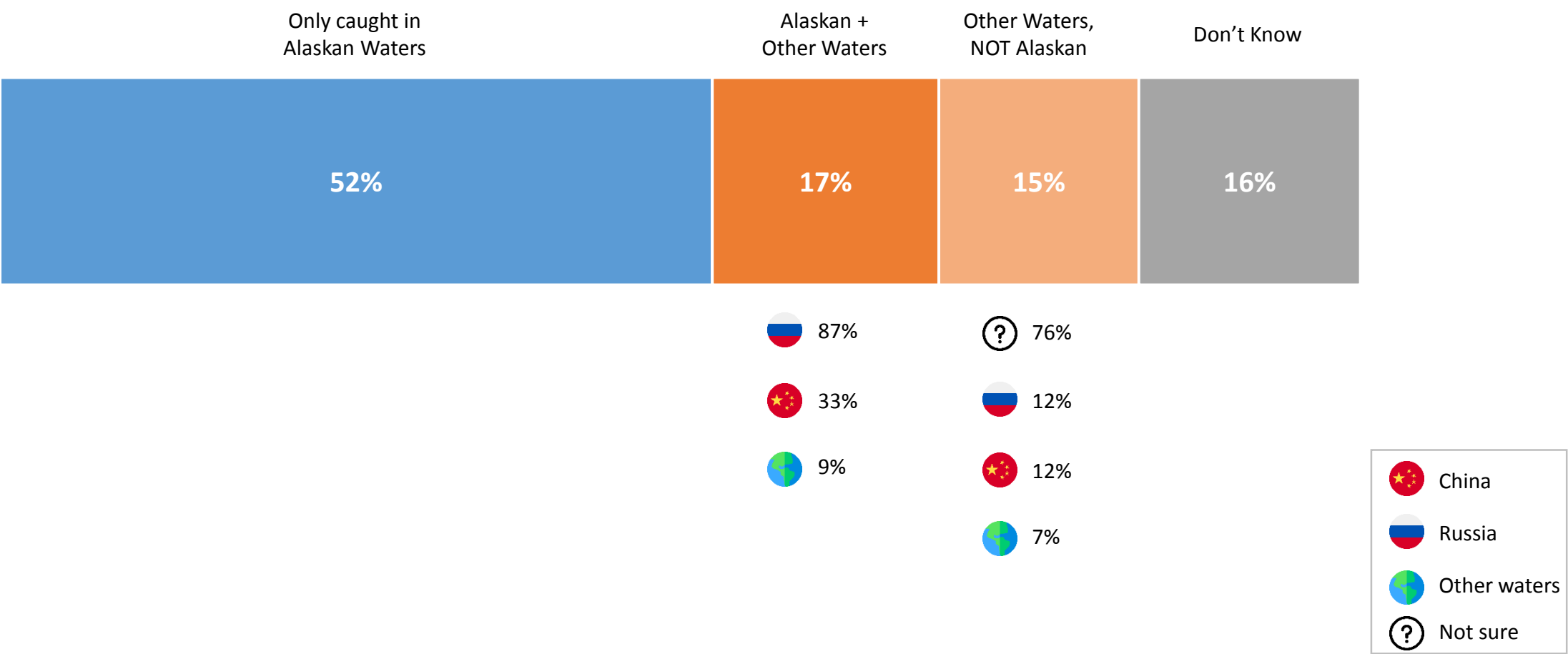
The majority of consumers in Belgium believe that Alaska Pollock can only be caught in Alaskan waters, with a further 14% believing it can be caught in Alaska + other waters (notably Russia)



Base: Q4a all respondents, Q4b those who believe Alaska Pollock can be caught in many different waters at Q4a
Source: Q4a, Q4b Where Alaska Pollock is Caught

Perceptions of origin breakdown - France

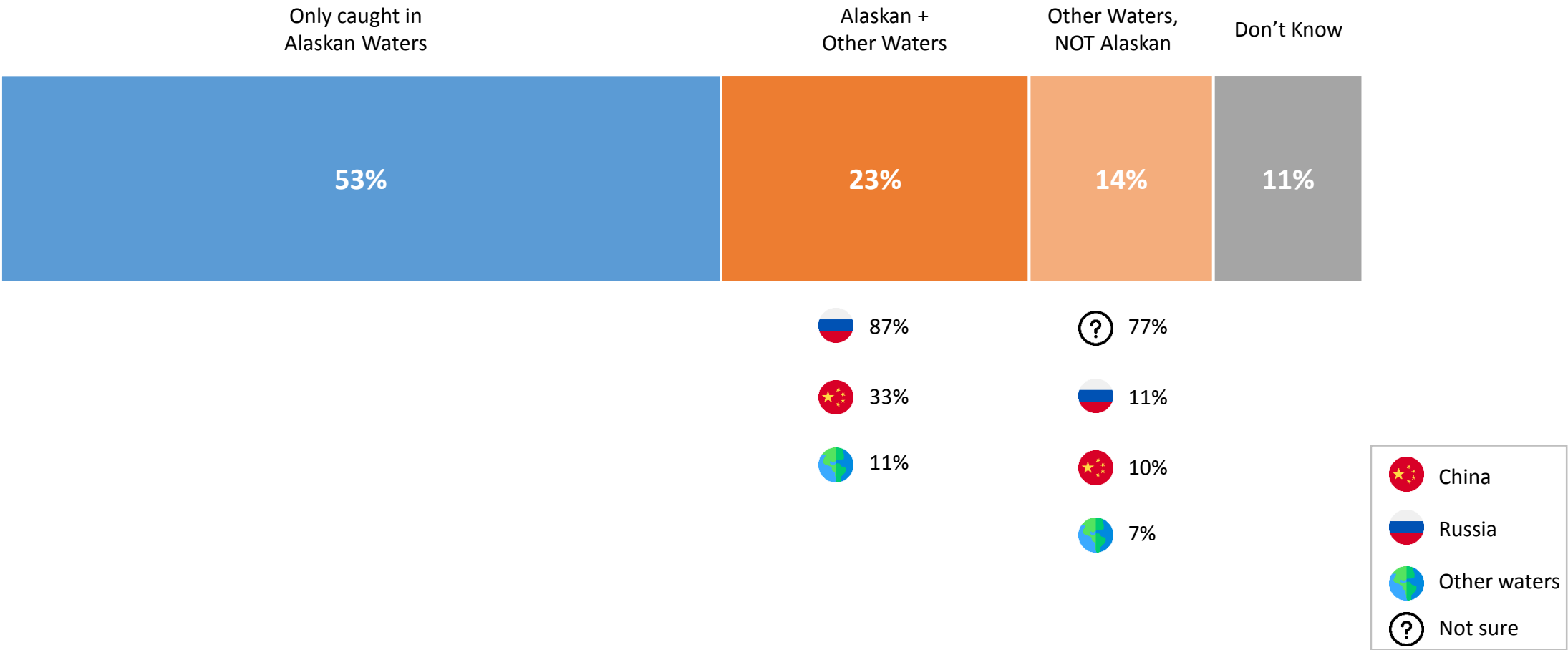
The majority of consumers in France believe that Alaska Pollock can only be caught in Alaskan waters, with a further 17% believing it can be caught in Alaska + other waters (notably Russia)



Base: Q4a all respondents, Q4b those who believe Alaska Pollock can be caught in many different waters at Q4a
Source: Q4a, Q4b Where Alaska Pollock is Caught

Perceptions of origin breakdown - Germany

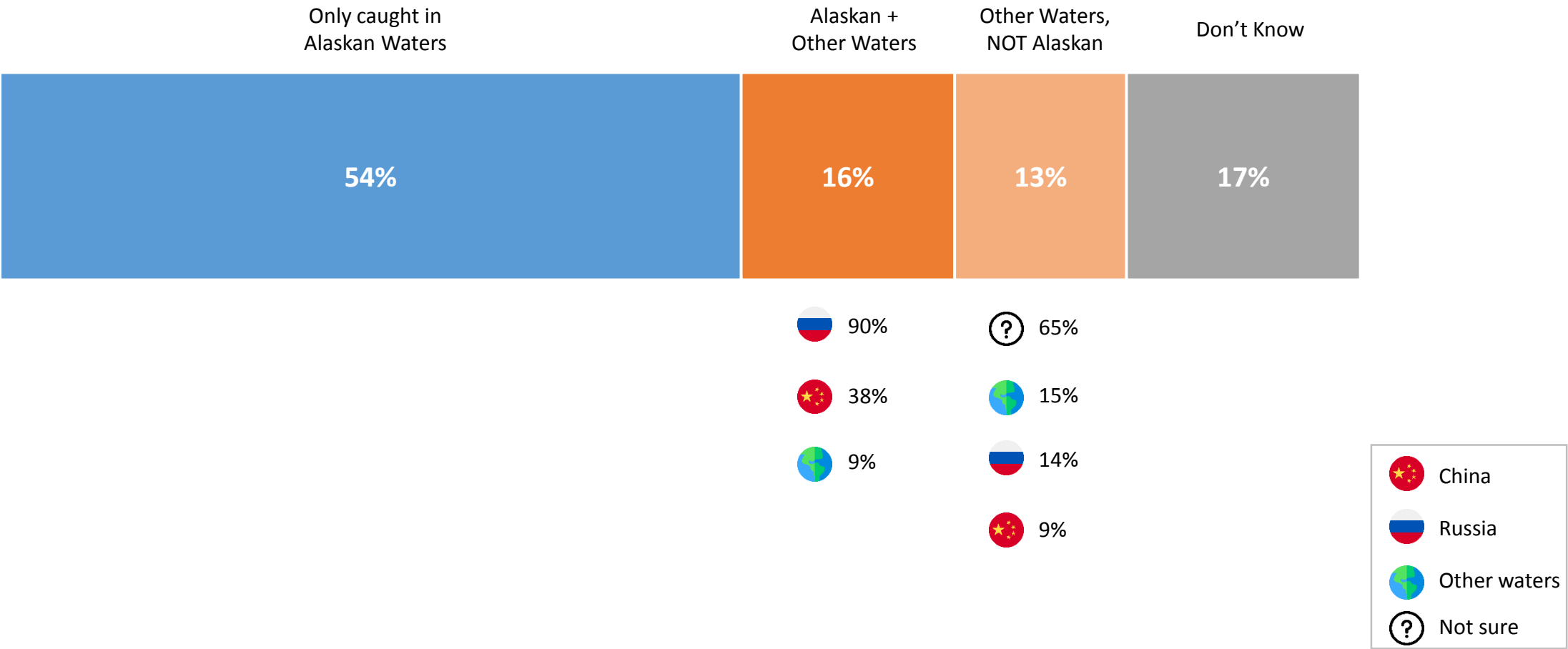
Over three-quarters of consumers in Germany believe that Alaska Pollock can be caught in Alaskan waters, with two-thirds of these believing it can only be caught in these waters.



Base: Q4a all respondents, Q4b those who believe Alaska Pollock can be caught in many different waters at Q4a
Source: Q4a, Q4b Where Alaska Pollock is Caught

Perceptions of origin breakdown - Netherlands

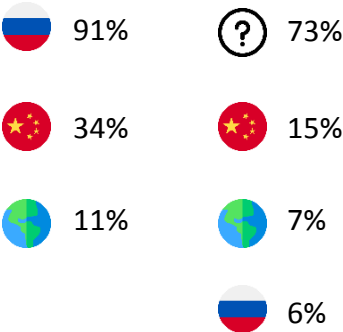
The majority of consumers in Netherlands believe that Alaska Pollock can only be caught in Alaskan waters, with a further 16% believing it can be caught in Alaska + other waters (notably Russia)



Base: Q4a all respondents, Q4b those who believe Alaska Pollock can be caught in many different waters at Q4a
Source: Q4a, Q4b Where Alaska Pollock is Caught

Perceptions of origin breakdown - UK

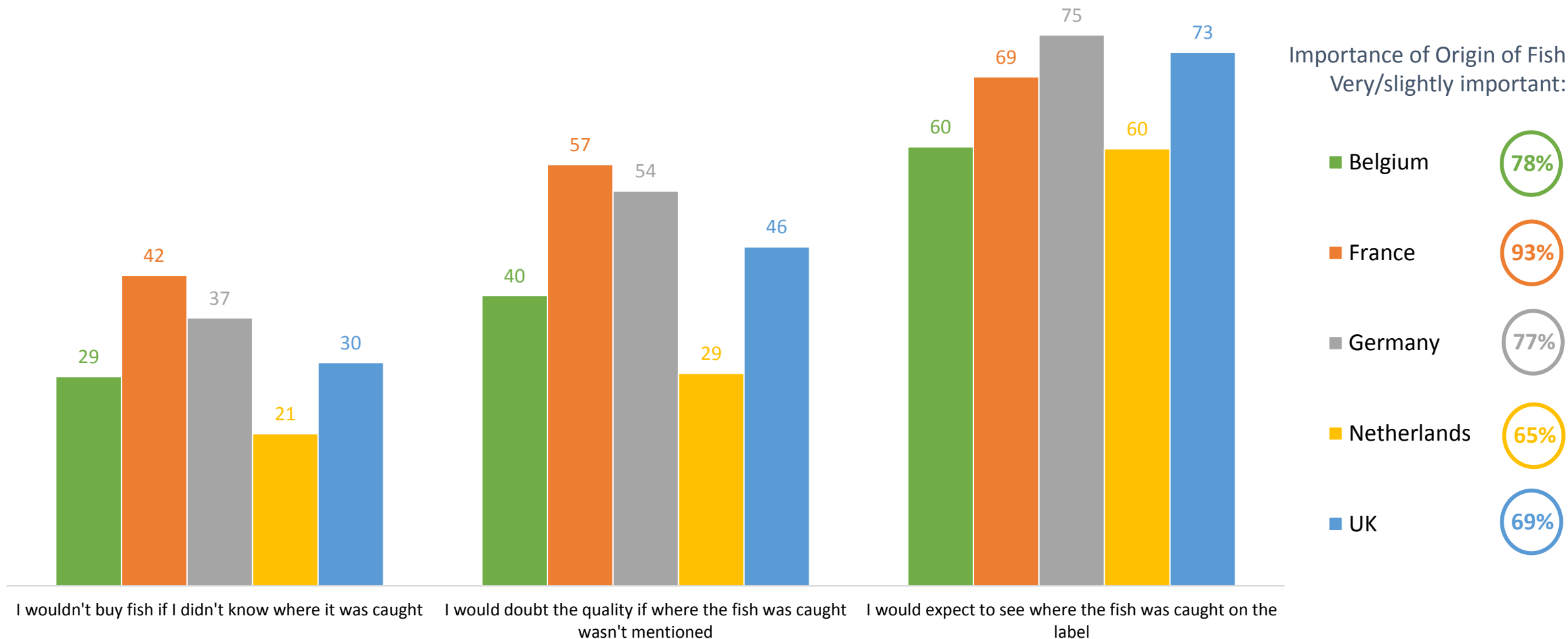
Nearly two-thirds of consumers in the UK believe that Alaska Pollock can only be caught in Alaskan waters, with a further 13% believing it can be caught in Alaska + other waters (notably Russia)



Base: Q4a all respondents, Q4b those who believe Alaska Pollock can be caught in many different waters at Q4a
Source: Q4a, Q4b Where Alaska Pollock is Caught

Importance of Origin

At least two thirds of consumers believe the origin of the fish is important in their purchase decision making process and the majority also expect to see this information on the label

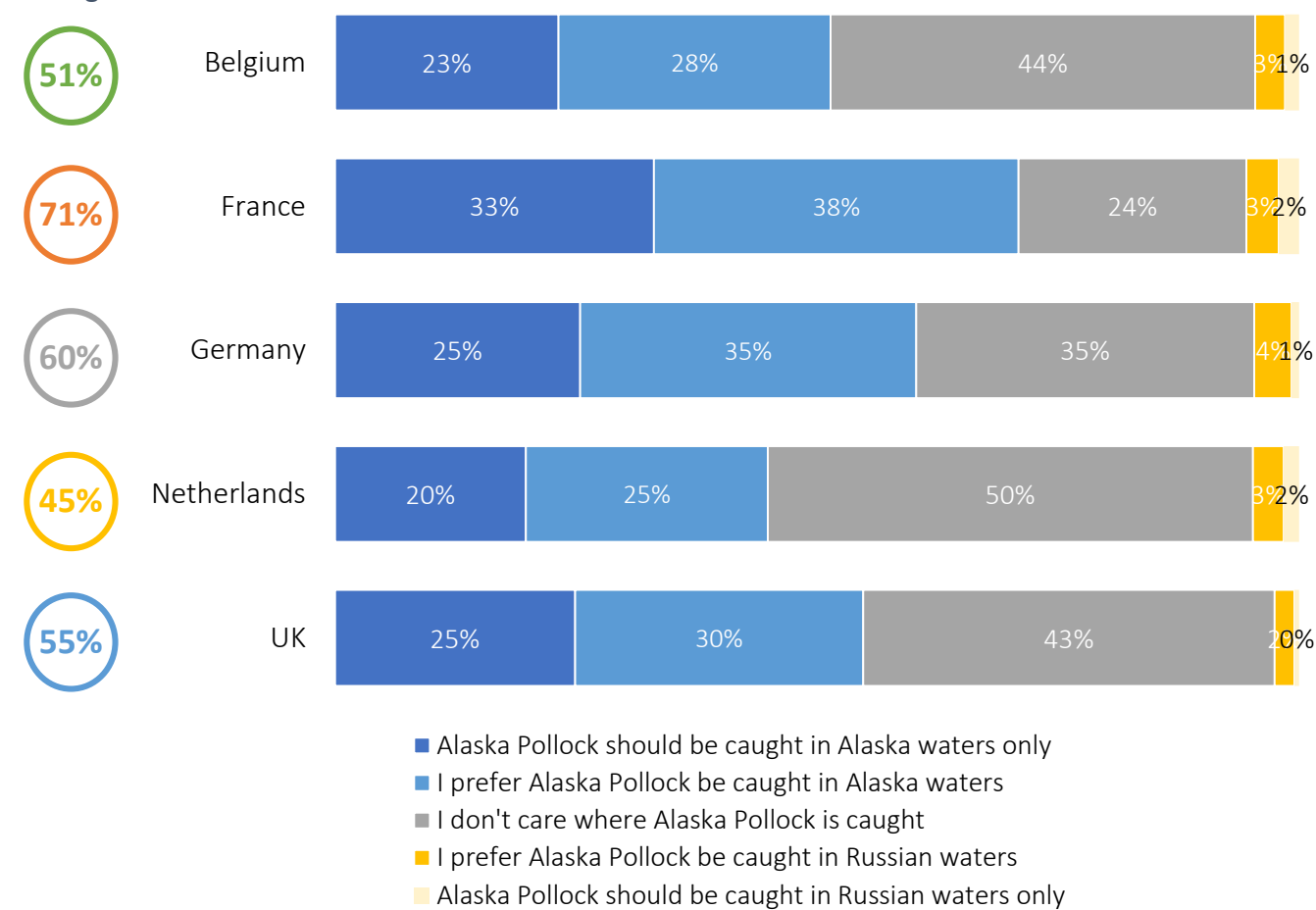


Base: All respondents left to right (1001, 1024, 1015, 1023, 1012)
Source: Q6 Impact of fish origin, Q5 Importance of origin on fish purchase

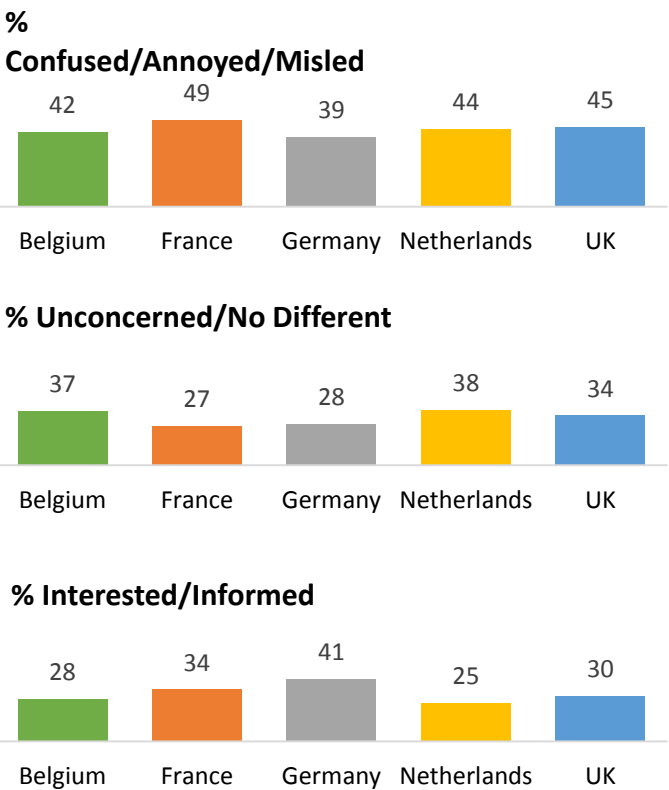
Preference for Alaska vs Russia origin

The majority of consumers believe that Alaska Pollock should be or would prefer it to be caught in Alaska waters and many feel negatively if they discovered it was caught in Russia

NET Alaska Pollock should be/prefer Alaska Pollock to be caught in Alaska waters:



Reactions to Alaska Pollock being caught in Russia:



Base: All respondents top to bottom or left to right (1001, 1024, 1015, 1023, 1012)
Source: Q7 Alaska/ Russia Pollock origins, Q8 Feelings towards Alaska Pollock origins

Reactions to Alaska Pollock of a Russia origin

Feeling misled is the top reaction in Belgium, France, Netherlands and UK and the second highest response in Germany

Ranked on straight average across all 5 countries		Belgium		France		Germany		Netherlands		UK	
		%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
	Misled	25	1	33	1	21	2	31	1	29	1
	Informed	21	3	26	2	30	1	16	3	20	2
	Unconcerned	24	2	17	3	15	5	15	4	15	6
	Confused	16	4	16	4=	17	4	13	5	19	4
	No different	13	5	10	7	13	6	24	2	19	3
	Interested	11	6	13	6	19	3	11	6	17	5
	Annoyed	10	7	16	4=	11	7	9	7	11	7

Reactions to Alaska Pollock of a Russia origin – among those who think Alaska Pollock can be fished only in Alaska Waters

Feeling misled is top in all markets; with Confused and Annoyed ranking higher up

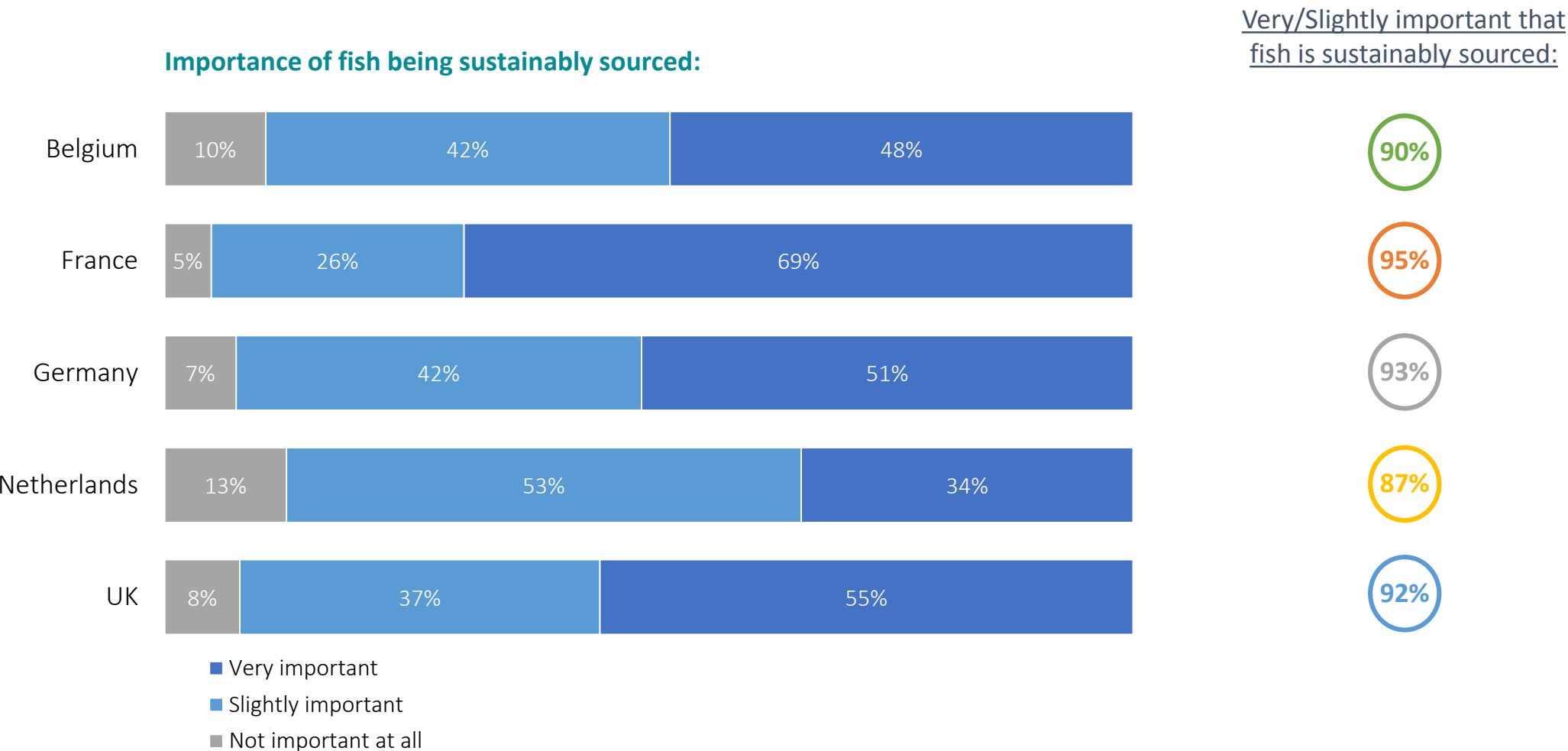
Ranked on straight average across all 5 countries		Belgium		France		Germany		Netherlands		UK	
		%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
	Misled	31	1	40	1	28	1=	38	1	33	1
	Informed	20	3	24	2	28	1=	14	4	22	2=
	Confused	21	2	19	4	22	3	17	2	22	2=
	Interested	13	6	16	5	21	4	13	5=	20	4
	Annoyed	14	5	20	3	15	5	11	7	12	6
	Unconcerned	19	4	15	6	11	6	13	5=	14	45
	No Different	8	7	5	7	8	7	16	3	11	7

Base: Those feeling Alaska Pollock only sourced in Alaska left to right (504, 536, 515, 554, 634)
Source: Q8 Feelings towards Alaska Pollock origins

Importance of Sustainability

Importance of Sustainability

The overwhelming majority of consumers want their fish to be sustainably sourced

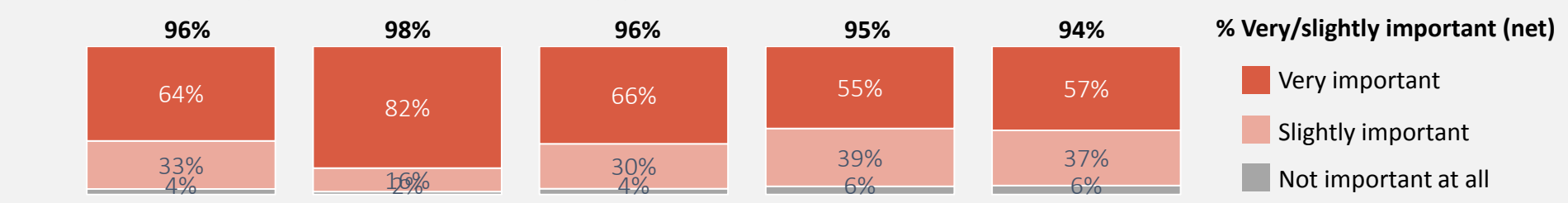


Base: All respondents top to bottom (1001, 1024, 1015, 1023, 1012)
Alaska Pollock consumers top to bottom (source Q9 responses 1 (Yes often) or 2 (Yes sometimes)
Source: Q8a Sustainability of fish importance

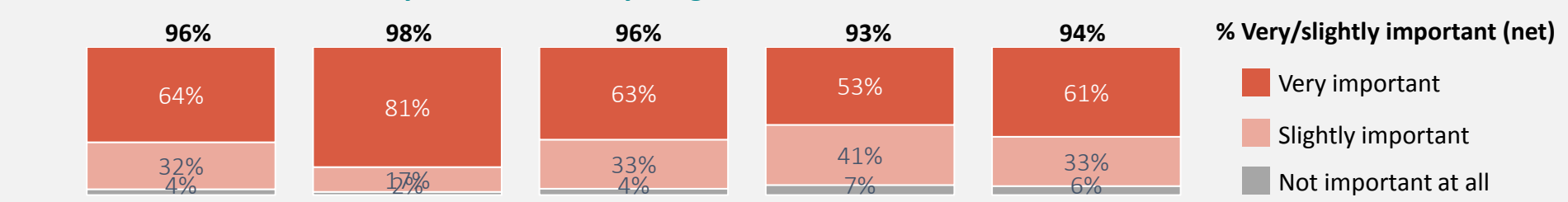
Reactions to fishing regulations

Over half of consumers, and in France the vast majority, believe that regulations for fishing producers are very important

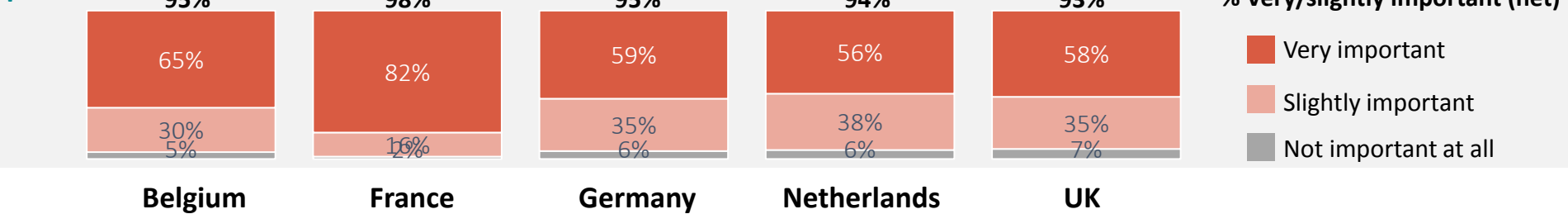
Independent biologists establish annual fishing quotas that cannot be exceeded:



A sustainable catch is accurately accounted for by weight, in order not to exceed allowable limits:



Independent observers monitor the catch on-board while fishing to ensure compliance with sustainability quotas and processes:



Base: All respondents left to right (1001, 1024, 1015, 1023, 1012)
Source: Q8b Reactions to different fishing regulations

APPENDIX 1: Questionnaire

Questionnaire (i)

BF-19305 | PGI Accreditation Research | Questionnaire | Version 5 | 9 April 2020

Questionnaire

Project name: PGI Accreditation Research
BF reference: BF-19305
Date: 6th July 2020
Version: 7
BF executive: Paul Carney, Corinne Macaskill, Maria Stonehouse

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PRE-CODED VARIABLES

P1 PRE-CODE COUNTRY

	Belgium	1	
	France	2	
	Germany	3	
	Netherlands	4	
	UK	5	
Title:	COUNTRY CODE		
Base:	ALL RESPONDENTS		
Type:	PRE-CODE		
Instructions:	PRESENT IN ALPHABETICAL ORDER		

BF-19305 | PGI Accreditation Research | Questionnaire | Version 5 | 9 April 2020

SECTION A: SCREENING AND DEMOGRAPHICS

Welcome to this survey! This survey will ask your opinions and behaviours towards certain foods. We hope you enjoy the survey and thank you for taking part. First of all a few questions about you.

D1. Are you...?

	Male	1	
	Female	2	
	Identify in another way	3	
	Prefer not to say	4	
Title:	GENDER		
Base:	ALL RESPONDENTS		
Type:	SINGLE CODE		
Instructions:	ORDER AS SHOWN		

D2. How old are you?

	Type in your age	/ __ /	
Title:	AGE		
Base:	ALL RESPONDENTS		
Type:	NUMERIC ENTRY		
Instructions:	ALLOW 18+		

D3. (UK) Where do you live?

	London	1	
	Yorkshire	2	
	East Midlands	3	
	East of England	4	
	South East	5	
	South West	6	
	West Midlands	7	
	North West	8	
	Scotland	9	
	Wales	10	
	Northern Ireland	11	
	North East	12	
Title:	REGION (UK)		
Base:	ASK ALL UK RESPONDENTS		
Type:	SINGLE CODE		
Instructions:	ORDER AS SHOWN		

BF-19305 | PGI Accreditation Research | Questionnaire | Version 5 | 9 April 2020

D3. (BL) Where do you live?

	Anvers	1	
	Brabant Wallon	2	
	Boulogne	3	
	Hainaut	4	
	Liege	5	
	Limbourg	6	
	Luxembourg	7	
	Namur	8	
	Oost Vlaanderen	9	
	Vlaams Brabant	10	
	West Vlaanderen	11	
Title:	REGION (BL)		
Base:	ASK ALL BL		
Type:	SINGLE CODE		
Instructions:	ORDER AS SHOWN		

D3. (FR) Dans quelle région vivez-vous?

	Auvergne-Rhône-Alpes	1	
	Bourgogne-Franche-Comté	2	
	Bretagne	3	
	Centre-Val de Loire	4	
	Corse	5	
	Grand Est	6	
	Hauts-de-France	7	
	Île-de-France	8	
	Normandie	9	
	Nouvelle-Aquitaine	10	
	Occitanie	11	
	Pays de la Loire	12	
	Provence-Alpes-Côte d'Azur	13	
Title:	REGION (FR)		
Base:	ASK ALL FR		
Type:	SINGLE CODE		
Instructions:	ORDER AS SHOWN		

Questionnaire (ii)

D3. (DE) Where do you live?

Hamburg	1	HAMBURG/BRE./SCH.- H./NIED
Bremen	2	
Schleswig-Holstein	3	
Niedersachsen	4	
Baden-Württemberg	5	BADEN-WÜRTTEMBERG
Hessen	6	HESSEN/R'LAND- PFALZ/S'LAND
Rheinland-Pfalz	7	
Saarland	8	
Bayern	9	BAYERN
Berlin	10	BERLIN
Brandenburg	11	MECK.-VOR./B'BURG/S.- ANHALT
Mecklenburg-Vorpommern	12	
Sachsen-Anhalt	13	
Nordrhein-Westfalen	14	NORDRHEIN- WESTFALEN
Sachsen	15	THURINGEN/SAXONY
Thüringen	16	

Title:	REGION (DE)
Base:	ASK ALL DE
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

D3. Where do you live? (Netherlands)

Drenthe	1	
Gelderland	2	
Groningen	3	
Flevoland	4	
Friesland	5	
Limburg	6	
Noord-Brabant	7	
Noord-Holland	8	
Overijssel	9	
Utrecht	10	
Zeeland	11	
Zuid-Holland	12	

Title:	REGION (NL)
Base:	ASK ALL NL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

D4 (EU markets). What is your household's total annual gross income (i.e. before tax)?

Up to €20,000	1	
€20,000-€29,999	2	
€30,000-€39,999	3	
€40,000-€49,999	4	
€50,000-€59,999	5	
€60,000-€74,999	6	
€75,000-€99,999	7	
€100,000-€124,999	8	
€125,000-€149,999	9	
€150,000 or more	10	
Don't know / prefer not to answer	11	

Title:	HOUSEHOLD INCOME (EU MARKETS)
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

D4a (UK). What is your household's total annual gross income (i.e. before tax)?

Up to £20,000	1	
£20,000-£29,999	2	
£30,000-£39,999	3	
£40,000-£49,999	4	
£50,000-£59,999	5	
£60,000-£74,999	6	
£75,000-£99,999	7	
£100,000-£124,999	8	
£125,000-£149,999	9	
£150,000 or more	10	
Don't know / prefer not to answer	11	

Title:	HOUSEHOLD INCOME (UK)
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

D4b (UK) Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best.

This could be you: the Chief Income Earner is the person in your household with the largest income.

If the Chief Income Earner is retired and has an occupational pension please answer for their most recent occupation.

If the Chief Income Earner is not in paid employment but has been out of work for fewer than 6 months, please answer for their most recent occupation.

Semi or unskilled manual work (e.g. Manual workers, all apprentices to be skilled trades, Caretaker, Park keeper, non-HGV driver, shop assistant)	1	
Skilled manual worker (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, public bar worker, etc.)	2	
Supervisory or clerical / Junior managerial, professional, administrative (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)	3	
Intermediate managerial, professional, administrative (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director small organisation, middle manager in large organisation, principle officer in civil service/local government)	4	
Higher managerial, professional, administrative (e.g. Established doctor, Solicitor, Board Director in a large organisation (200+ employees), top level civil servant/public service employee)	5	
Student	6	
Casual worker – not in permanent employment	7	
Housewife/ Homemaker	8	
Retired and living on state pension	9	
Unemployed or not working due to long-term sickness	10	
Full-time carer of other household member	11	
Other	12	

Title:	UK SOCIAL GRADE
Base:	ASK ALL IN UK
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

DUMMY VARIABLE: ALLOCATE SOCIAL GRADE TO THE BELOW

AB	1	Q5B = 4,5
C1	2	Q5B = 3,6
C2	3	Q5B = 2
DE	4	Q5B = 1, 7- 12

Questionnaire (iii)

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S1. Select the response which most closely matches your consumption of each of the following types of food:

1	Red meat (e.g. beef, lamb, pork)
2	Chicken
3	Fish / seafood
4	Legumes (e.g. beans, lentils)
5	Dairy (e.g. milk, yogurt, cheese)
6	Eggs

	I eat this 1	I don't eat this but would consider it 2	I would not consider eating this 3
Title:	FOODS WOULD CONSIDER		
Base:	ASK ALL		
Type:	SINGLE CODE		
Instructions:	RANDOMISE		

SCREEN OUT IF 'I WOULD NOT CONSIDER EATING THIS' SELECTED FOR CODE 3 (FISH / SEAFOOD)

S2. You mentioned that you eat, or would consider eating, fish/seafood. Which of the following types of fish / seafood would you eat?

1	Fish/seafood from a restaurant
2	Fresh fish / seafood from a supermarket / speciality store
3	Frozen non-breaded fish or seafood (either plain or sauced)
4	Frozen breaded fish or seafood
5	Tinned fish or seafood

	I eat this 1	I don't eat this but would consider it 2	I would not consider eating this 3
Title:	TYPES OF FISH CONSIDERED		
Base:	ASK THOSE WHO SAID S1 = 1 OR 2 FOR CODE 3		
Type:	SINGLE CODE		
Instructions:	RANDOMISE		

FOR RESPONDENTS TO CONTINUE THEY NEED TO HAVE MENTIONED 'I EAT THIS' (CODE 1) OR 'I DON'T EAT THIS BUT WOULD CONSIDER IT' (CODE 2) FOR ANY OF RESPONSE OPTIONS 1 – 4 IN S2

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SECTION B: TERM FAMILIARITY

Q1. Which of these types of fish have you heard of? Please select all that you have heard of.

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
99	None of these EXCLUSIVE

Title:	FAMILIARITY
Base:	ASK ALL
Type:	MULTI CODE
Instructions:	RANDOMISE EXCEPT CODE 99

Q2. Today we would like to ask you some questions about Alaska Pollock. What comes to mind when you hear, see or read the term 'Alaska Pollock?' Please be as detailed as you can.

OPEN QUESTION	
Title:	THOUGHTS WHEN SEEING 'ALASKA POLLOCK'
Base:	ASK ALL
Type:	OPEN ENDED
Instructions:	

Q3. What does the name 'Alaska Pollock' say to you about this fish? Please select all that apply.

1	It tells me where it was caught
2	It tells me its species
3	It tells me which country it came from
4	It tells me about the environment in which it was caught
5	Other (please specify)
6	Don't know EXCLUSIVE

Title:	ALASKA POLLOCK ORIGIN
Base:	ASK ALL
Type:	MULTI CODE
Instructions:	RANDOMISE EXCEPT OTHER (CODE 5) AND DON'T KNOW (CODE 6)

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Q4a. Where do you think the fish 'Alaska Pollock' can be caught?

1	It can only be caught in Alaskan waters
2	It can be caught in many different waters
3	Don't know

Title:	WHERE ALASKA POLLOCK IS CAUGHT (1)
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

Q4b. You said that Alaska Pollock can be caught in different waters. What waters do you think they can be caught in?

1	Alaskan waters
2	Russian waters
3	Chinese waters
4	Other waters (please specify)
5	Not sure EXCLUSIVE

Title:	WHERE ALASKA POLLOCK IS CAUGHT (2)
Base:	ASK THOSE THAT SAID Q4a = 2
Type:	MULTI CODE
Instructions:	RANDOMISE EXCEPT CODES 4 AND 5

Q5. Typically, how important is where the fish is caught to you, when deciding which fish to buy?

1	Very important
2	Slightly important
3	Not important at all

Title:	ORIGIN OF FISH AND ROLE IN PURCHASE
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

Q6. How much do you agree or disagree with each of the following statements?

1	I wouldn't buy fish if I didn't know where it was caught
2	I would doubt the quality if where the fish was caught wasn't mentioned
3	I would expect to see where the fish was caught on the label

Disagree strongly 1	Disagree 2	Neither 3	Agree 4	Agree strongly 5
Title:	IMPACT OF FISH ORIGIN			
Base:	ASK ALL			
Type:	SINGLE CODE			
Instructions:	RANDOMISE			

Questionnaire (iv)

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SECTION C: ALASKA / RUSSIA COMPARISONS

Q7. When you buy a seafood product labelled as "Alaska Pollock" the fish can in fact come from Alaska or from Russia. With that in mind, which of the following best reflects your opinion?

1	Alaska Pollock should be caught in Alaska waters only
2	I prefer Alaska Pollock be caught in Alaska waters
3	I don't care where Alaska Pollock is caught
4	I prefer Alaska Pollock be caught in Russian waters
5	Alaska Pollock should be caught in Russian waters only

Title:	ALASKA / RUSSIA POLLOCK ORIGINS
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

Q8. How would you feel if you were to learn that the Alaska Pollock you bought was actually caught in Russia? Please tick all that apply.

1	Confused
2	Annoyed
3	Misled
4	Unconcerned
5	Interested
6	Informed
7	No different EXCLUSIVE

Title:	FEELINGS TOWARDS ALASKA POLLOCK ORIGINS
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	RANDOMISE EXCEPT NO DIFFERENT (CODE 7)

Q8a. When deciding which fish to buy, how important is it to you that the fish is sustainably sourced?

1	Very important
2	Slightly important
3	Not important at all

Title:	SUSTAINABILITY OF FISH IMPORTANCE
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

Q8b. Thinking now about the regulations that fish producers must consider when fishing. How important to you are each of the following?

1	Independent biologists establish annual fishing quotas that cannot be exceeded
2	

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3	A sustainable catch is accurately accounted for by weight, in order not to exceed allowable limits
	Independent observers monitor the catch on-board while fishing to ensure compliance with sustainability quotas and processes

Very important	Slightly important	Not important at all
1	2	3

Title:	SUSTAINABILITY OF FISH IMPORTANCE
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

Q9. Do you eat Alaska Pollock?

1	Yes often
2	Yes sometimes
3	No
4	I don't know if I do

Title:	ALASKA POLLOCK - AWARENESS OF CONSUMPTION
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

SECTION D: PROFILING Qs

Finally, a few short questions about you and your household for profiling purposes.

D5. What is the highest level of education you have reached?

No formal schooling	1
School education	2
Higher education - university / college	3
Vocational education & training	4
Other	5

Title:	EDUCATION
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

D6. In which type of area do you live?

City centre	1
City outskirts	2
Large town	3
Small town	4
Rural area	5

Title:	URBAN VS. RURAL
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

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D7. What is your current employment status?

Employed full-time	1
Employed part-time	2
Not employed and looking for work	4
Not employed and not looking for work	5
Retired	6
Student	7
Homemaker	8
Other	9

Title:	EMPLOYMENT STATUS
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

D8(a). How many children live with you? (enter the number in each age range)

Children aged 0 to 4	/ /
Children aged 5 to 10	/ /
Children aged 11 to 18	/ /
Children aged 19 or over	/ /
No children live with you	5

Title:	HH STRUCTURE: CHILDREN IN HH
Base:	ASK ALL
Type:	NUMERICAL ENTRY
Instructions:	ORDER AS SHOWN; ALLOW BLANKS - RECODE TO ZERO. MAX 10 PER AGE GROUP

D8(b). Apart from yourself, what other adults live with you?

Your spouse / partner	1
Your parents	2
Other adult family members	3
Other adults (not family members)	4
No other adults live with you	5

Title:	HH STRUCTURE: ADULTS IN HH
Base:	ASK ALL
Type:	MULTI CODE
Instructions:	ORDER AS SHOWN

D9. Thank you very much for your time in answering this survey. Are you willing to take part in a possible follow-up survey?

Yes	1
No	2

Title:	RECONTACT
Base:	ASK ALL
Type:	SINGLE CODE
Instructions:	ORDER AS SHOWN

THANK AND CLOSE

Q1 Species Lists

UK	France	Germany	Belgium	Netherlands
Cod	Cabillaud	Kabeljau	Kabeljauw / Cabillaud	Kabeljauw
Hake	Merlu	Hecht	Heek / Merlu	Heek
Salmon	Saumon	Lachs	Zalm / Saumon	Zalm
Alaska Pollock	Colin d'Alaska	Alaska-Seelachs	Alaska koolvis / Colin d'Alaska	Alaska koolvis
Haddock			Schelvis / Églefin	Schelvis
Tilapia	Tilapia	Tilapia	Tilapia / Tilapia	Tilapia
Sole	Sole	Seezunge	Tong / Sole	Tong
Coley				
Halibut	Flétan			
Trout	Truite	Forelle	Forel / Truite	Forel
Plaice	Plie	Scholle	Schol / Plie	Schol
Seabass	Bar		Zebaars / Bar	
	Brème	Brachse		Brasem
Monkfish	Lotte	Seeteufel		
Basa / Pangasius		Pangasius	Pangasius	Pangasius
		Hering	Herring / Hareng	Haring
				Makreel
Tuna	Thon	Thunfisch	Tuna	Tonijn
			Meerval / Sliure / Poisson-chat	

APPENDIX 2:

Credentials

A quantitative research programme was conducted by Bonamy Finch



We are...

The founders of the MRS Advanced Data Analytics (ADA) network

which was set up to help identify, develop and disseminate research industry best practice in the general area of advanced analytics. Members of the team at Bonamy Finch have also presented papers on different statistical issues at ESOMAR, MRS, and The Chartered Institute of Marketing and are on the editorial review board for IJMR.



HM Government

We are...

trusted partners of the UK Government

We have worked for a number of Government departments in the UK - Department of Health, Department for Work and Pensions, Department for Environment, Food & Rural Affairs.



We are...

European based agency, experienced in a wide range of sectors and categories, including highly regulated sectors

Our experience covers a wide range of sectors and categories, ranging from FMCG through to high value, highly consideration purchases. Bonamy Finch has a huge amount of experience of working in regulated markets, including over 100 trade off studies for five of the big six energy suppliers plus conjoint models and segmentation solutions for financial services providers

Bonamy Finch work with some of the world's leading brands

vue

**HIGHLAND
SPRING**

Coca-Cola

CATAPULT
We work with
Innovate UK


Spire Healthcare

DEBENHAMS



Which?

 **Direct Line
Group**

*Johnson's
baby*



apollo

 **SPORT
ENGLAND**


defra
Department for Environment
Food and Rural Affairs

Google

SONY


Department
of Health

 **RBS**

sky

Prophet

 **EY**

ghd
good hair day, every day

ebay

DWP Department for
Work and Pensions

Ravensburger

glh Great
London
Hospitality

 **Ann Summers**

JO MALONE
LONDON

 **DELHAIZE**

Compeed

CONDÉ NAST

IN SPIRIT AND WINE
CORBÝ

Thank you

Paul Carney, Corinne Macaskill

STRAT7 **BonamyFinch** 

Coveham House, Downside Bridge Road, Cobham, Surrey, KT11 3EP, United Kingdom

T: +44 (0)1932 918 988

W: www.bonamyfinch.com



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