Assessment of consumer preferences in the context of multiple labels: the case of fishery and aquaculture products

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Abstract :

Labels are currently numerous and diverse in the fishery and aquaculture products (FAPs) market, providing consumers with information about the different attributes of FAPs. This extensive development implies that consumers have to face trade-off situations. This paper aims (1) to identify which labels are most valued by consumers when they face a trade-off situation. (2) to study the consumption profiles behind these preferences and (3) to suggest ways of improving the efficiency of labelling policies. Based on a survey conducted in 2021 (n = 1 427), this article describes FAPs consumers' preferences for labelled FAPs. To do so, each consumer was asked to rank their favourite scheme from a pool of nine hypothetical labels related to specific FAPs characteristics. Then, we used a mixed multinomial logit model (MMLM) with marginal effects to analyse consumption profiles. Our results show heterogeneity among consumers regarding labelled FAPs. Overall, labels that ensure intrinsic qualities remain preferred to labels linked to ethical considerations. Moreover, while preferences for domestic productions are prominent, there is a very wide gap with real purchasing behaviour. Furthermore, this study shows that personal motivation, age, gender, knowledge or place of residence influence the preferences expressed. Labels are a policy tool used to reform the FAPs value chain. Nevertheless, they are struggling to achieve their objectives. Our results can be useful for better targeting the messages to be implemented, improving the efficiency of labelling policies and helping consumers to make informed and sustainable choices.

Keywords : Multiple choices, Labelling schemes, Consumers' preferences, Seafood, France, Multinomial mixed logit model

22 JEL Codes: D12, Q22, Q56

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1. Introduction

24 Our food systems are facing multiple challenges that question their ability to provide healthy and sustainable 25 food for a growing world population. As a result, significant efforts are underway to reform our modes of production and consumption of food products. While public policies have initially focused on the productive 26 27 sphere, consumers are now recognised as a driving force that is able to transform our food value chains (Brunin et 28 al., 2022). Over the last few years, the concept of "sustainable consumption" has become widely disseminated 29 (Santeramo et al., 2018). It lies at the heart of the United Nation's sustainable development programme via goal 30 12: "Ensure sustainable consumption and production patterns"¹. At the EU scale, the "From Farm to Fork" strategy 31 also promotes this policy goal. In order to guide consumers towards sustainable consumption choices, 32 policymakers promote, among other things, new information tools such as labelling schemes. To make our food 33 systems more sustainable, it is therefore essential to understand how consumers position themselves concerning 34 these labelling initiatives.

35 These labels can take varied forms, as shown by the definition adopted by the Food and Agriculture 36 Organization (FAO):" A food label is any tag, brand, mark, pictorial or other descriptive matter, written, printed, 37 stencilled, marked, embossed or impressed on, or attached to, a container of food or food product". Labels are currently highly developed in the food market (Caswell & Mojduszka, 1996). A study launched in 2013 by the EU 38 39 Commission already counted over 900 food labels² in the EU, where producers are key actors in this expansion. 40 In a globalized food market, labels are a means of differentiating products from competition. Unfortunately, this 41 may lead to dubious labels with varying expectations and constraints, allowing for artificial changes in the 42 perceived value. Consequently, this potential information asymmetry could lead to increasing distrust among 43 consumers.

44 The global expression "label jungle" (Isabel Sonntag et al., 2023) captures the negative sides of this label 45 expansion. This includes a loss of meaning of labels, growing confusion, overlap risks and even difficult trade-off 46 situations for consumers. Indeed, labels can cover a wide range of product attributes (Gracia & De-Magistris, 47 2016) through different certification methods, criteria, etc. From a theoretical point of view, labels transform 48 credence attributes (Nelson, 1970; Darby & Karni, 1973) into search attributes for consumers (Roe & Sheldon, 49 2007) and reduce asymmetric information between producers and consumers. Credence attributes are attributes 50 (Lancaster, 1966) for which the marginal cost of seeking information exceeds the associated marginal benefit, both 51 before and after consumption. In other words, their presence in the product is difficult for the consumer to assess, 52 even after consumption. Labels, therefore, remain the only source of information that allows consumers to consider 53 this dimension in their consumption preferences. However, labels typically focus on a single product attribute, 54 such as environmental impact, health or animal welfare. When making consumption choices, consumers will thus 55 encounter some trade-off situations

The FAPs (Fisheries and Aquaculture Products) market is a highly "label-dependent" market (Washington, 2008; Fonner & Sylvia, 2015). This dependence is explained by the presence of credence attributes in FAPs (Sogn-Grundvag et al., 2014), notably valued by consumers in the context of responsible consumption. Today, different

¹ More information on this sustainable development goal can be found at <u>https://sdgs.un.org/goals/goal12</u>

² Survey IPSOS: Consumer market Study on the functioning of voluntary food labelling schemes for consumers in the European Union EAHC/ FWC/2012 86 04

59 labels coexist in this market to inform consumers about these attributes. It includes labels related to FAPs 60 production methods, FAPs quality, FAPs origin, FAPs welfare, etc. Interestingly, trade-off consuming situations 61 described earlier are thus prevalent (Isabel Sonntag et al., 2023).

62 While the sustainability of the FAPs sector is a major challenge (Tigchelaar et al., 2022), it is essential to 63 understand how consumers position themselves regarding these multiple labelling schemes and possible trade-off 64 situations. This is of interest to public decision-makers or even to the industry. Although the existing literature 65 often focuses on understanding the preferences for a single label (Johnston et al., 2001; Brécard et al., 2009; 66 Salladarré et al., 2010; Uchida et al., 2014; Weitzman & Bailey, 2018), or a limited number of labels (Brécard et 67 al., 2012; Banovic et al., 2019), to our knowledge, available research has rarely investigated these expressed 68 preferences for a large pool of alternatives. However, Fonner and Sylvia (2015), Gracia and De-Magistris (2016), 69 and Maesano et al. (2019) pointed out that there is a need to understand better how consumers interact with these 70 multiple choices inside the food market. This article seeks to fill this gap. It proposes to refine the knowledge on 71 consumers' preferences for labelled FAPs via a choice situation towards ten hypothetical alternatives (see Section 72 2). This approach tries to bring consumers closer to their current trade-off situations. The aim of this article is to:

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Study the most preferred labelling schemes by FAPs consumers in a framework close to real choice by allowing preferences to vary across ten alternatives ;

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• Study the consumption profiles behind these expressed preferences ;

• Propose public policy recommendations regarding FAPs to orient the sector towards greater sustainability.

78 Our case study will be the French FAPs market, a market particularly dependent on labelling schemes 79 (FranceAgrimer, 2019). Indeed, labels have quickly expanded in the last decades (Organic, Protected Geographical 80 Indication, Label Rouge, etc.) and cover a wide range of FAPs' attributes (production methods, origin, quality, 81 animal welfare, etc.). The different features of this market may explain this noteworthy development. First, 82 regarding consumption habits, it seems French consumers purchase more and more processed FAPs (FranceAgriMer, 2021a). These products are described as low quality (Ahern et al., 2021), whose consumption 83 84 can impact consumers' health. This may therefore motivate a demand for information regarding FAP's quality, 85 health or even nutritional aspects. Second, a large share of domestic catches and supplies originate from production 86 methods with high environmental impacts (trawling, intensive aquaculture, etc.) (STECF, 2020). This may explain 87 the emergence of an ethical demand and associated ecolabels in the French FAPs market (Lucas et al., 2021). 88 Furthermore, this market is highly dependent on imports. In 2018, France imported 2,078 thousand tons of FAPs 89 (FranceAgriMer, 2021b), i.e., more than 2/3 of French consumption. While French consumers are increasingly 90 concerned about the origin of their food, traceability in the FAPs sector is highly problematic (Crona et al., 2016; 91 Lewis & Boyle, 2017), leading to the development of geographical origin labels. Finally, the "Fair Trade" trend is 92 growing in importance for food demand (Rousseau, 2015; Clark et al., 2017). As a credence attribute, consumers 93 would value further information, creating a possible demand for related labels in the FAPs sector.

94 The paper is structured as follows. Section 2 will introduce the database and the methodology used to analyse 95 the stated preferences. Section 3 will present results regarding the preferences of French consumers for labelled FAPs. Section 4 will discuss our results, provide recommendations regarding public policies and suggest furtherresearch.

98

2. Materials and methods

99 2.1 Data

100 The database used in this article stems from a FAPs consumer survey carried out between April and May 101 2021 on the French market (noted COPECO-Covid-Norway database) in the framework of two research programmes: a French research programme, COPECO3, and a Norwegian research programme, COVID-102 103 NORWAY⁴. This survey had two objectives: 1) to measure the impact of the COVID crisis on FAP consumption 104 and 2) to study the preferences of French consumers concerning labelled FAPs. The survey was performed online and administered by KantarWorldPanel to 1,504 FAPs consumers. The quotas method was applied to obtain a 105 106 representative sample of the French population regarding age and gender. After processing and analysing 107 responses, we selected a sample of 1,427 individuals. Table 1 presents the socio-demographic characteristics of 108 this sample.

109	Table 1. Characteris	stics of the sample	– 1,427 obs	(Source:	COPECO-Covid-Norway database	- 2021)
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-	Sai	mple	France ¹		
Condor(9/)	Male Female		Male Femal		
Gender (%)	48.8	51.2	48.3	51.7	
Socio-Professional Category (%)					
Farmers	C).2	0).8	
Artisans, retailers and business owners	2	2.9	3	3.5	
Managers and higher intellectual professions	11.6		9.5		
Intermediate professions	13.9		14.1		
Employees	26.9		16.1		
Workers	4.6		12.1		
Retirees	28.3		26.9		
Other non-working people	11.6		17.0		
Age categories (%)					
[18-34]	23.9		22.6		
[35-49]	25.1		24.9		
[50-64]	25.8		25.2		
[65+]	25.2		27.2		

¹Source: INSEE, data from 2021

Note: As we included only FAPs consumers, the under-representation of the socio-professional category "Farmers and Workers" can be explained by the negative correlation between the level of education and FAPs consumption (Hicks et al., 2008).

- 110 This survey is broken down into five sections for a total of 57 questions: 1) food consumption habits
- 111 (including during the COVID crisis); 2) FAPs consumption and purchasing behaviour; 3) consumer preferences
- 112 for FAPs; 4) motivations, knowledge and implications of FAP consumers; and, lastly, 5) socio-demographic
- 113 characteristics. In this article, we focus on questions relating to consumption habits (Section 2), preferences

³For more information on this research programme: <u>https://www.umr-amure.fr/projets-scientifiques/projet_copeco/</u>

⁴ For more information on this research programme: <u>https://www.forskningsradet.no/en/</u>

expressed regarding labelled FAPs (section 3), Schwartz values (Schwartz, 1992; Schwartz, 2012) (Section 4) and

115 the socio-demographic section (Section 5).

116 To study consumers' preferences for labelled FAPs, we asked the respondents to rank their three favourite labels from a choice of ten hypothetical alternatives (section 3). Here, we decided to focus solely on the first 117 118 expressed preference, as it represents the label consumers prioritise. Moreover, we have deliberately chosen to work on hypothetical schemes, not existing ones. Therefore, each label in our survey was presented to consumers 119 120 by a specific definition, not by an existing brand. The purpose was to avoid "anchoring bias" related to brand recognition. This allows us to study preferences for the attribute labelled rather than a preference for the label 121 122 itself. Indeed, according to the results of the FranceAgriMer survey (2019), it seems that this anchoring bias is 123 apparent in the French FAP market. The selected labels may already exist on the French FAPs market (ecolabels, 124 origin labels, animal-welfare labels, nutrition claims and quality labels) or may respond to global food market 125 trends (the Fair-Trade label is not currently available for FAPs, and the health claim remains fictional⁵). This 126 choice brings consumers closer to a real trade-off situation (ceteris paribus). These labels and their definitions are

Labels	Definition
Animal Welfare	Identify FAPs that respect animal welfare throughout the production process
Ecolabel	Identify FAPs that respect the environment and resources
Fair-Trade	Identify FAPs that guarantee a minimum income for producers and good working
	conditions
Local origin	Identify FAPs produced in your region
France origin	Identify FAPs produced in France (except your region)
EU origin	Identify FAPs from European fisheries and aquaculture (except France)
Health	Identify FAPs that do not contain toxic substances
Nutrition	Identify the nutritional content of FAPs (less salt, rich in omega 3, etc.)
Quality	Identify FAPs with a higher quality level than other products in the category

127 presented in Table 2.

129

130 **2.2 Method**

131 2.2.1 Variance and Mean Comparison Tests

We wanted to test whether the preferences declared for one label are statistically lower or higher than those declared for another. Two statistical tests were performed. First, an F-test to measure the equality of variances

- between the means. If the equality of variances of the means is not rejected, a Student t-test is used. Otherwise,
- the Welch t-test should provide more accurate results (Overall et al., 1995).

¹²⁸ **Table 2.** Definition of the labels used (Source: COPECO-Covid-Norway survey - 2021)

⁵ Despite their absence in the FAPs market, more and more initiatives are being developed in the food industry concerning health information.

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$$t_{Student} = \frac{\bar{X}_1 - \bar{X}_2}{s_p \sqrt{\frac{1}{n_1} + \frac{1}{n_2}}} \quad \text{with} \quad s_p = \sqrt{\frac{(n_1 - 1)s_{X_1}^2 + (n_2 - 1)s_{X_2}^2}{n_1 + n_2 - 2}} \quad (1)$$

137
$$t_{Welch} = \frac{\bar{X}_1 - \bar{X}_2}{\sqrt{\frac{s_1^2}{N_1} + \frac{s_2^2}{N_2}}} \text{ with } s_{\bar{X}_1} = \frac{s_1}{\sqrt{n1}} \text{ and } s_{\bar{X}_2} = \frac{s_2}{\sqrt{n2}}$$
(2)

138 With \bar{X}_n the mean to compare, s_n the sample means' standard deviations and n_n the sample sizes.

For these two tests, if the null hypothesis (H0) is not rejected, we should conclude to an equality of means. If not,the means are statistically different.

141 2.2.2 Mixed Multinomial Logit (MMNL) Model

142 The model used is based on Lancaster's theory (Lancaster, 1966) and the random utility theory 143 (McFadden, 1974). Consumers are assumed to compare alternatives and choose the alternative with the highest 144 level of utility. The utility U of alternative a obtained in a choice situation t by consumers i is therefore given by:

145 $U_{ait} = V_{ait} + \varepsilon_{ait}$ (3)

We used a Mixed Multinomial Logit (MMNL) model to analyse consumer preferences for labelled FAPs. 146 147 As McFadden and Train (2000) discussed, this model efficiently represents an economic discrete choice. The MMNL is an extension of the Multinomial Logit Model (MLM). Compared to a conventional MLM, the MMNL 148 149 model relaxes the independence of the irrelevant alternatives assumption (IAA) (McFadden & Train, 2000). The 150 MMNL fits with choice data in which individuals make choices across unordered options and includes attributes 151 that vary between individuals (such as income, age, etc.). It uses random coefficients to model the correlation of 152 choices across alternatives. The mixed logit models are commonly used in choice literature (Bhat & Gossen, 2004), 153 including for labelling schemes (Bonnet & Simioni, 2001; Gracia & De Magistris, 2016).

In our case, consumers select the label with the highest perceived utility. For the mixed logit model, a standard representation of the utility that individual *i* receives from alternatives a, a = 1, 2,..., 10 denoted by U_{ia} is:

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$$U_{ia} = x_{ia}\beta_i + \omega_{ia}\alpha + z_i\delta_a + \epsilon_{ia}$$
(4)

158 β_i are random coefficients that vary across individuals in our sample, and x_{ia} is a vector of case-specific variables. 159 α is a fixed coefficient from ω_{ia} a vector of alternative-specific variables. δ_a are fixed alternative-specific 160 coefficients, and zi is a vector of case-specific variables. ε_{ia} is a random term. Our model does not include 161 alternative-specific variables. The probability that case *i* chooses alternative *a* regarding the random parameter β_i 162 is:

163
$$Y = P_{ia}(\beta) = \frac{e^{x_{ia}\beta_i + w_{ia}\alpha + z_i\delta_a}}{\sum_{a=1}^A e^{x_{ia}\beta_i + w_{ia}\alpha + z_i\delta_a}}$$
(5)

We end up with a variable to be explained Y = 1 if the individual has ranked the label concerned at first in his/her preference. Otherwise, Y = 0. 166 2.2.3 Explanatory variables included in our model

The existing literature focusing on FAPs consumers' preferences for labelling schemes (Wessells et al., 1999; Johnston et al., 2001: Jaffry et al., 2004; Brécard et al., 2012; Salladarré et al., 2010; Weitzman & Bailey, 2018; Zander & Feucht, 2018; Maesano et al., 2019; Maesano et al., 2020; Zander et al., 2022) was consulted to identify variables to be included in our model. However, some explanatory variables used can differ among articles, and several models could have been estimated in our framework. To compare these different models, measure their performances, and select the most pertinent regarding our dataset and research objectives, we referred to the Akaike criteria (AIC) and Schwarz's Bayesian information criteria (BIC).

Finally, eleven explanatory variables (detailed hereafter) were selected. We included sociodemographic variables related to age (grouped into four age classes, with four modalities) [*18-34; 35-49; 50-64; over 65 years old*], gender (with two modalities) [*female, male*], department of residence [*coastal department*] and the presence of children in the household [*children*]. These variables often influence the stated preferences for labelled FAPs (Brécard et al., 2009; Salladarré et al., 2010; Bronnmann et al., 2021; Maesano et al., 2019; Zander et al., 2022).

Since price is an important factor of FAPs consumption (Claret et al., 2012; Menozzi et al., 2023), and the price premium associated with labelled products is often perceived as a barrier to their consumption (Roheim et al., 2011), we incorporated a variable related to consumers' price importance when buying FAPs [*price*]. Our consumers were asked to answer the question: "Would you say that price is your first choice criterion when buying fish at home?" by positioning themselves on a Likert scale from 0 (Totally disagree) to 10 (Totally agree).

184 As consumers' motivations are a significant predictor of behaviour regarding ethical consumption (Brécard et 185 al., 2012; Reinstein & Song, 2012; Zander & Feucht, 2018), we integrated three motivation variables into our 186 model. These variables were constructed by factorisation. The first factorial analysis was performed on Schwartz's 187 values-related questions (Schwartz, 1992; Schwartz, 2012) and identified two motivational variables: [Universalism] and [Tradition]. A series of eight questions (see Table 3) were presented to consumers, who were 188 189 then asked to indicate their level of agreement with each statement on a Likert scale from 0 (Not at all like me) to 190 7 (Totally like me). Two factors have been retained (Table 3). The first factor encompasses three statements (Take 191 care of nature; Combat threats against nature; Protect the environment) and measures individuals' degree of 192 universalism, as defined by Schwartz (1992), hereafter referred to as "Universalism". The second factor stems 193 from the same factorisation and groups three other statements (Uphold beliefs in traditional values, Follow 194 traditions, Value traditional practices). It reflects the attachment to the "Tradition" motivation defined by 195 Schwartz (1992). We performed a second factorial analysis on consumer preferences concerning FAPs attributes 196 (Table 3), which allowed us to identify one other motivation variable [Origin]. The factor identifies consumers' 197 interest in the geographical origin of the product they consume. It encompasses three preferences linked to the 198 origin of FAPs (fish of local origin; fish of France origin; fish of EU origin). We identify it as "Origin" motivation 199 in our model.

Our model also includes a variable related to consumers' assessment of the ability of individual consumers to influence environmental issues, measured by Perceived Consumer Effectiveness (PCE). Indeed, according to Verbeke et al. (2007), the PCE influences consumers' choices regarding green consumption. We performed a third factorial analysis on questions related to consumers' perception of the consequences of their consumption choices on the marine environment. Consumers had to position themselves regarding five statements (see Table 4) on a Likert scale from 0 (I totally disagree) to 7 (I totally agree). We named the factor identified as [*PCE*]. Table 4 presents the factorisation results.

207 Finally, subjective [Subj. Knowl] and objective [Obj. Knowl] knowledge variables were considered. As

- 208 Pieniak et al. (2013), Almeida et al. (2015), and Menozzi et al. (2023) discussed, consumer knowledge is an
- 209 essential factor in consumer decision-making, notably regarding FAPs. Our subjective knowledge variable is
- 210 constructed on an average score obtained regarding four statements, following Zander and Feucht's (2018) article.
- 211 Consumers were asked to position themselves on a Likert scale from 0 (Totally disagree) to 7 (Totally agree). Our
- 212 objective knowledge variable is based on the number of correct answers obtained from four "Yes/No" statements.
- All these statements are detailed in Table 6.
- Table 7 summarises all the variables included in our model with their mean values.

Question used	Most significant variables	Constructed variables	Cronbac's alpha statistic	Barlett test	КМО
Factor analysis #1					
"I kike"					
(1) to take care of nature					
(2) to fight against threats to nature	+(1)(2)(3)	Universalism	0.89		
(3) to protect the environment					
(4) to help people I care about				p-value = 0.00	0.821
(5) to take care of people close to me					
(6) to maintain traditional beliefs and values	+(6) (7) (8)	Tradition	0.85		
(7) to follow traditions					
(8) to value traditional practices					
Factor analysis #2					
"I prefer"					
(1) fresh fish					
(2) wild fish					
(3) local fish					
(4) environmentally friendly production	+(3) (5) (8)	Origin	0.83	p-value = 0.00	0.88
(5) French fish					
(6) raised fish					
(7) fish that do not present a health risk					
(8) European fish					

Table 3. Factoring method and associated test results (Source: COPECO-Covid-Norway survey - 2021)

Note: To determine the internal consistency of items, we used Cronbach's alpha statistic. A score of 0.7 is an acceptably reliable coefficient, but lower thresholds are sometimes used in the literature (see Nunnaly. C, 1978). Factors with an eigenvalue over one are retained. The Bartlett test is Bartlett's test of sphericity, and KMO is the Kaiser-Meyer-Olkin measure. Number of Observations: 1,427.

Question used	Most significant variables	Constructed variables	Cronbac's alpha statistic	Barlett test	КМО
Factor analysis #3					
(1) By buying sustainable FAPs, I can help					
limit the environmental impact of fishing and aquaculture	+(1)(2)(5)				
(2) Whenever I can, I choose sustainable FAPs		PCE	0.65	p-value = 0.00	0.72
(3) I can do nothing more about the depletion of fish stocks	-(3) (4)			•	
(4) My FAPs choices do not influence the sustainability of fisheries					
(5) Labels are an effective information tool for the consumer					

Table 4. Factoring method and associated test results (Source: COPECO-Covid-Norway survey - 2021)

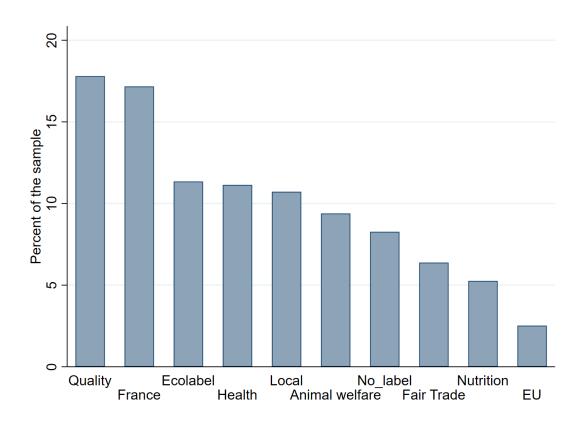
Note: To determine the internal consistency of items, we used Cronbach's alpha statistic. A score of 0.7 is an acceptably reliable coefficient, but lower thresholds are sometimes used in the literature (see Nunnaly. C, 1978). Factors with an eigenvalue over one are retained. The Bartlett test is Bartlett's test of sphericity, and KMO is the Kaiser-Meyer-Olkin measure.

Number of Observations: 1,427.

215 **3. Results**

3.1. The most valued labels on the French market
Figure 1 gives the first picture of the relative importance of French consumers' preferences regarding labelled
FAPs in a trade-off situation. Before interpreting this chart, we performed the F-test and T-test. These tests revealed
no statistical difference between the preferences expressed for the quality labels and the "France Origin" labels. In
addition, they revealed no statistical difference between the preferences expressed for the ecolabels, the health
claims and the "Local Origin" labels. Otherwise, all the other preferences were statistically differentiated. Table 8
summarises the results of all the tests performed.

223 According to these results, the two most valued labels are the quality labels, with 17.80 % of the sample ranking it, and the "France Origin" labels, with 17.17 % of the stated preferences. Then comes a group composed 224 225 of three labels: the ecolabels (11.35 %), the health allegations (11.14 %), and the "Local Origin" labels (10.72 %), followed by the animal welfare schemes (9.39 %). Finally, three schemes are statistically less preferred by 226 227 consumers: the Fair-Trade labels, the "Nutrition" claims, and the "EU origin" labels ranked by 6.38 %, 5.26 % 228 and 2.52 % of consumers. Interestingly, 8.27 % of our consumers prefer FAPs without labels. Thus, in a multiple-229 choice situation, French consumers' preferences for labelled FAPs products are highly heterogeneous. However, 230 this heterogeneity is not uniformly distributed, and some initiatives remain more valued by consumers.



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Figure 1. Expressed preferences of French consumers according to the ten alternatives tested - 1 427 obs. (Source:
 COPECO- Covid-Norway database - 2021)

3.2. The results of the MMNL

Our Mixed Multinomial Logit Model was estimated using STATA.17. Our base outcome is the "No label" alternative. The coefficients presented in the remainder of the article are the marginal effects. They allow a more accurate interpretation of the results compared to the standard coefficient by providing information about the change in predicted probabilities due to a change in a particular predictor (Wulff, 2015). The results of the MMNL are displayed in two separate tables (Tables 5 and 9), although all the preferences were conjointly estimated in our model.

Table 5 discusses results for six preferences: "France origin", "Local origin", Ecolabel, Animal Welfare, Health allegation and the "No Label" alternative. As French consumers do not highly value them (Figure 1), the results for nutrition claims, "EU origin", and Fair-Trade labels will not be discussed but are presented in Table 9. As the notion of quality is highly heterogeneous and each consumer may have his or her own perception of quality, we chose not to discuss the preferences for the quality label. Indeed, interpreting this preference remains highly complex without a better understanding of these different quality expectations. Moreover, consumers can use this label as a "safe-haven" option. Results for this label are also presented in Table 9.

248 3.2.1. Motivations as drivers of preferences

249 Table 5 highlights the strong link between consumers' motivations and stated preferences. Universalism 250 influences the preferences expressed for different schemes. Individuals with a high degree of universalism tend to 251 prefer ecolabels and animal welfare labels. However, marginal effects show that universalism is more strongly 252 associated with ecolabels preferences (+6.5 %) than animal welfare (+2.7 %). Conversely, the opposite correlation 253 is observed for the "France origin" scheme (-3.2%) and the "No label" alternative (-1.8 %). According to our 254 results, attachment to traditional values also drives consumers' preferences. The positive correlation between 255 "tradition" motivation and the "France origin" label (+3.2 %) seems consistent with the underlying idea of cultural 256 attachment. Nevertheless, finding a negative effect with the "Local origin" label (-1.9 %) is quite surprising. The 257 results show a stronger negative correlation with stated ecolabel preferences (-2.7 %). Finally, and logically, the "origin" motivation increases the probability of choosing "France origin" (+8.6 %) and "Local origin" labels (+5.4 258 259 %). On the contrary, this motivation reduces the preferences expressed for ecolabels (-3.1 %) and the "No label" alternatives (-2.1 %). 260

	France ^{<i>a</i>}	Ecolabel ^a	Health ^a	Local ^a	Animal Welfare ^a	No Label
Nb. Indiv. (%)	245 (17.17)	162 (11.35)	159 (11.14)	153 (10.72)	134 (9.39)	118 (8.27)
ge (Ref [18–34] years old)					
[35–49]	.012 (.028)	052* (.030)	.057* (.021)	011 (.022)	.008 (.025)	.020 (.019)
[50-64]	.016 (.028)	092*** (.027)	.077*** (.022)	.023 (.024)	013 (.023)	.004 (.017)
[65+]	.061* (.032)	114*** (.027)	.081*** (.026)	.026 (.026)	041* (.022)	.012 (.020)
Female	006 (.021)	020 (.018)	.050*** (.018)	.001 (.017)	.039** (.016)	021 (.014)
Coastal Department	055*** (.021)	046*** (.018)	002 (.017)	.069*** (.016)	002 (.016)	.016 (.013)
Children	.004 (.023)	026 (.018)	.029* (.019)	.008 (.019)	026 (.017)	033** (.015)
Price	007 (.004)	.001 (.003)	001 (.003)	.002 (.003)	003 (.003)	.007** (.003)
Motivations						
Universalism	032** (.014)	.065*** (.012)	.007 (.011)	012 (.011)	.027** (.011)	018** (.008)
Tradition	.032** (.013)	027*** (.009)	002 (.010)	019* (.010)	001 (.009)	011 (.008)
Origin	.086*** (.016)	031*** (.010)	009 (.012)	.054*** (.013)	011 (.010)	021*** (.008)
РСЕ	009 (.015)	.033*** (.012)	.021 (.013)	013 (.012)	004 (.011)	077*** (.009)
Subj. Knowl	008 (.009)	.003(.007)	016** (.008)	.008 (.008)	009 (.007)	003 (.006)
Obj. Knowl	.012(.009)	010 (.007)	.003 (.007)	.008 (.007)	.004 (.007)	022*** (.006)

 Table 5. Mixed multinomial logit model marginal effects (Source: COPECO-Covid-Norway database - 2021)

^a Base alternative: No Label

Significance threshold: *** 0.01; ** 0.05; *0.1. In parentheses: Standard deviation Number of observations = 1,427

260 *3.2.2.* Influence of socio-demographic variables

261 Behind motivations, socio-demographic characteristics also influence stated preferences in our model. We first find an age effect. We note, for example, that compared to 18 to 34-year-olds, other individuals in our sample 262 are less likely to prefer ecolabels. We also see *via* our marginal effects that the older the consumers get, the more 263 264 the preferences for these labels decrease. Indeed, compared to 18-34-year-olds, the probability for consumers 265 between 35 and 49 years old to choose ecolabel decreased by 5.2%, while this probability decreased by -11.4 % 266 for those over 65. The opposite outcome is apparent for health allegations. The older consumers get, the more 267 likely they prefer these alternatives. By comparison, the probability of choosing this label increased by 8.1 % for individuals over 65 and by 5.7 % for people between 35 and 49 years old. The change in probability for people 268 269 between 50 and 64 years old is 7.7 %. Finally, if we look specifically at consumers over 65, they express a specific 270 interest in the "France origin" labels (+6.1 %) and are less interested in the animal welfare ones (-4.1 %).

A gender effect also appears in Table 5. Women seem to value health allegations and animal welfare labels more than men. This effect is more pronounced for health claims, with a marginal effect of 5 %, higher than for animal welfare schemes (+3.9 %). Interestingly, the presence of children in the household influences only the preferences for the "health claim" (+2.9 %) and the "No label" option (-3.3 %). Our results also reveal a coastal effect. Indeed, living close to the coast positively influences the preference for a "Local origin" label (+6.9 %). Conversely, it reduces preferences for ecolabels and "France origin" labels. This effect is more significant for the "France origin" label (-5.5 %) than for the ecolabel (- 4.6 %).

Finally, variables linked to consumers' knowledge and PCE marginally influence the stated preferences. Indeed, objective knowledge influences only the expressed preferences for the "No label" alternative (-2.2 %). Although we find an effect of subjective knowledge on preferences regarding health claims (-1.6 %), no other relationship is highlighted in our results. The PCE variable influences only the preferences for ecolabels (+3.3 %) and the "No label" (-7.7 %). Attention paid to price during FAPs purchasing acts influences only the preferences for the "No label" alternative (+0.7 %).

4. Discussion

285 As outlined above, labels are highly developed in the French FAPs sector. However, until now, we had limited information on how consumers' preferences for these schemes were structured. In limited-choice studies, each 286 287 label under consideration seems to be essential without considering the possible interactions with other initiatives. 288 Indeed, although the literature on consumer preferences is abundant (Wessells et al., 1999; Jaffry et al., 2004; Pieniak et al., 2010; Claret et al., 2012; Brécard et al., 2012; Uchida et al., 2014; Weitzman & Bailey, 2018; Zander 289 290 & Feucht, 2018; Zander et al., 2022), it was difficult to estimate the relative place of specific preference in the global demand. However, as Lucas et al. (2019) discussed, "it is essential to study consumer preferences in a 291 292 multiple-label framework to determine realistic preferences". Our multiple-choice approach fills this gap. It better 293 captures the trade-offs encountered during consumer purchasing acts and better reveals relative preferences. It 294 allows the identification of the labels most valued within the market and those that are least researched. We even 295 have information on the share of consumers not interested in labelled FAPs. Finally, this approach makes 296 comparing the different consumption profiles corresponding to the expressed preferences easier. These profiles 297 are essential for policymakers and industry to adapt their labelling strategies. More generally, this approach 298 provides genuine contributions compared to constrained choice approaches, *ceteris paribus*. This conclusion is in

line with Fok et al. (2012), Nguyen et al. (2015) and Wulff (2015) on the contribution of multiple-choice methods.

300 Our results underline the substantial heterogeneity of French consumer preferences relating to FAPs labelling 301 issues. This heterogeneity was expected with respect to existing works (Johnston et al., 2001; Teratanavat & 302 Hooker, 2006; Hasselbach & Roosen, 2015; Bronnmann et al., 2021). Nevertheless, it is now possible to identify 303 how this heterogeneity is structured. As in other food markets, Figure 1 confirms the relative importance of 304 domestic production for French FAP consumers, where 17.17 % preferred the "France origin" label, and 11.72 % 305 the "Local origin" label. These results are consistent with the existing literature (Uchida et al., 2014; Feldmann & 306 Hamm, 2015; Banovic et al., 2019). Conversely, the "EU origin" label is often overlooked when consumers have 307 the opportunity to select "domestic" alternatives. This result underlines the preference for the closest productions, 308 as demonstrated by Uchida et al. (2014) and Picha et al. (2017), when consumers have the choice. However, this 309 result could have been modified with a different geographical scope (for example, "EU origin" versus "Worldwide 310 origin"). Regarding the policy side, promoting French FAPs represents a promising lever with various advantages. 311 First, promoting national FAPs ensures economic support for the national value chain in response to this weakened 312 sector (Brexit, the energy crisis, closure of fishing areas, etc). Second, it also addresses food sovereignty issues, a 313 debate that has been back on the agenda since the COVID crisis. Third, promoting domestic production is relevant 314 from an environmental perspective. On the one hand, consumers are provided with resources managed under the 315 Common Fisheries Policy⁶ (CFP). On the other hand, it can reduce fishing pressure on certain exploited stocks 316 and minimise emissions caused by transporting these imported species.

317 Several works have discussed growing ethical demand in the food sector (Grunert et al., 2014; Bratanova et 318 al., 2015; Tomsa et al., 2021). However, Isabel Sonntag et al. (2023) show that consumers' egoistic interests are 319 stronger than altruistic ones in a trade-off situation. Our results tend to confirm this finding. Indeed, in a multiple-320 choice situation, quality and "France origin" labels are significantly preferred to ethical labels (ecolabel, animal 321 welfare, fair-trade). We also find that health allegations are significantly more researched than animal welfare and 322 Fair-Trade labels. In summary, our results show that ethical preferences remain secondary compared to "self-323 oriented" ones (related to Quality, France origin labels or Health allegations) when it comes to labelled FAPs 324 consumption.

325 The third position of ecolabels in the stated preferences leads to discussion. Indeed, when we consider the 326 numerous literature that focuses solely on ecolabels (Wessells et al., 1999; Jaffry et al., 2004; Brécard et al., 2009; 327 Brécard et al., 2012; Salladarré et al., 2010; Lucas et al., 2018; Banovic et al., 2019; Lucas et al., 2021), we tend 328 to overestimate the importance of this demand in the FAPs sector. However, as discussed, consumers prefer other 329 labels such as quality or "France origin". Ecolabels are, however, part of national and European strategies for 330 resource conservation. Fostering this green demand is essential to achieve this objective. In this line, several levers 331 are discussed in the literature. According to Giacomarra et al. (2021), consumer information on ecolabels is 332 essential, particularly in this global context of mistrust. In our survey, 40% of individuals still doubt that buying

⁶ The Common Fisheries Policy is a European sector-specific policy. Formulated in 1983, one of its main functions is the preservation of exploited stocks.

333 sustainable FAPs can help to protect the ocean⁷. This perception is even more pronounced among older generations.

Considering the influence of behavioural insights for reinforcing "*existing instruments and help achieve policy objectives*" could be relevant (Grolleau et al., 2016). These behavioural-based instruments can address some of the limitations of approaches based on the market.

337 These suggestions for policy improvement are all the more important to consider as our results suggest that 338 green demand could grow in the future. Indeed, our model highlights that the young generation particularly values 339 ecolabels. Moreover, this generation is deeply committed to the responsible consumption trend (Ivanova et al., 2019). We can thus assume that green demand will increase in the coming years, confirming an ongoing trend in 340 341 the FAPs market (Lucas et al., 2021; European Commission 2016, 2018, 2021). The same assumption can also be 342 made regarding the animal welfare label. Currently, this scheme is valued by 9.39 % of individuals in our sample, 343 ranking it the fifth most popular label. However, our results show that older consumers are less interested in this 344 label. More generally, these two results support the idea of a growing "ethical demand", consistent with the 345 findings of Zander & Feucht (2018) and Maesano et al. (2020) findings.

346 Nevertheless, these results should be considered carefully as we work on stated preferences. Indeed, there is 347 often a behavioural gap (Young et al., 2010) between expressed preferences and real purchasing acts. Firstly, regarding preferences for domestic production. As discussed before, French FAPs consumption greatly depends 348 349 on importation. For an annual consumption of 33.5 kg FAPs per person, six species (tuna, salmon, cod, mussels, 350 Alaska pollock and shrimps) represent 47% of consumption, and these species are mostly imported 351 (FranceAgriMer, 2021a). Recent consumption even tends to show an increase in the consumption of imported 352 salmon and shrimp. Although French consumers declare preferences for domestic FAPs, their daily consumption 353 shows a very different reality. Consuming French products, therefore, implies a profound change in their eating 354 habits. However, this change seems challenging, especially over the short term. Long-term policies must be 355 implemented to initiate structural changes, notably by educating young consumers. Secondly, this behavioural gap 356 may also challenge the apparent growing ethical demand. This phenomenon is particularly well-known regarding 357 sustainable goods (Padel & Foster, 2005; Lombardot & Mugel, 2017). Indeed, when discussing sustainable 358 consumption, consumers often declare that they pay attention to it (to conform to "societal expectations"). 359 Nevertheless, real purchasing behaviours are often not consistent with this positioning. Again, there are several 360 ways to limit this behavioural gap, including informing and educating consumers.

361 For the first time, we obtained direct information on consumers who do not value labelled FAPs. These 362 profiles are often poorly studied in the literature. As expected, price can be a barrier to preferences for labelling 363 schemes. We show that price-conscious consumers tend to prefer unlabelled FAPs. As labels are associated with a price premium (Roheim et al., 2011), these consumers tend to prioritise unlabelled FAPs. On the contrary, we 364 find that households with children are less interested in unlabelled FAPs. One possible explanation is that labels 365 366 are often associated with products of higher quality. Parents will tend to prioritise differentiated products to ensure 367 their children's well-being. Unsurprisingly, we also find that consumers' knowledge influences the rejection of 368 unlabelled FAPs. Our results show that people who are aware of the sector (and related issues) and who believe 369 that their consumption choices can influence the environment's future reduce their preferences for non-labelled

⁷ We asked consumers to position themselves on a 0 to 7 scale regarding the question: "By buying sustainable seafood, I can help limit the environmental impact of fishing and aquaculture".

products. This aligns with the literature, often revealing that consumer involvement drives expressed preferences for labels (Olsen, 2003; Pieniak et al., 2010; Zander et al., 2022). Finally, the "*Universalism*" and "*Origin*" motivations also reduce the expressed preferences for unlabelled FAPs. As existing literature shows that motivations are essential drivers of consumer preferences for labelled products, it is not surprising that consumers who express one of these two motivations tend to have a lower preference for non-labelled FAPs.

375 According to FranceStratégie (2021), French food policies fail to encourage FAPs consumption, despite their 376 recognised health benefits. One explanation is that these policies tend to be rigid and poorly adaptive. A tailored communication that better accounts for the heterogeneity of consumption profiles could be critical to making them 377 378 more efficient. Our article provides interesting insights on this point. Age is, for instance, a factor to consider in 379 policy implementation. To encourage young people to eat FAPs guarantees related to the environmental attributes 380 of FAPs can be promising. On the contrary, older people are more interested in the health aspect of FAPs, as they 381 are more directly involved in these issues (Pieniak et al., 2010; Carlucci et al., 2015). Our model also highlights 382 that coastal households have differentiated expectations compared to non-coastal ones. Indeed, they are 383 particularly looking for locally labelled FAPs. According to the existing literature (Feldmann & Hamm, 2015; 384 Picha et al., 2017; Zander et al., 2022), local food is associated with a high-quality product, a product with low 385 environmental impacts or a product that supports the local economy. Coastal consumers, therefore, use the "Local 386 origin" labels as a proxy for these product attributes. This perceived premium quality of local products may also 387 explain the rejection of products labelled "France origin" in these areas. Indeed, the closer the production is to the consumer, the higher the perceived quality (Picha et al., 2017). Conversely, living in a coastal area reduces 388 389 preferences for ecolabels. According to Salladarré et al. (2010), ecolabels can be perceived as a barrier to local 390 fisheries and activities endemic to the territory. Globally, place of residence may also be a relevant characteristic 391 for implementing efficient policies. Other variables, such as gender or the presence of children in the household, 392 can also be interesting to consider in policy implementation according to our model.

393 This work has certain limitations. First, preferences are studied "all things being equal", and characteristics 394 such as the price of a product, its mode of presentation, its species, the certifying organisation, the level of 395 transparency, and the formulation and control of standards defined are not considered. However, these factors are 396 essential in choosing labelled FAPs (Wessells et al., 1999; Jaffry et al., 2004; Brunsø et al., 2009; Menozzi et al., 397 2020; Bronnmann et al., 2021). Second, the well-documented gap between data on declared behaviours and real purchases (Ankamah-Yeboah et al., 2020) also requires treating the results of this survey with caution when 398 399 focusing on the real purchasing behaviour of households. Finally, this work focuses on the French market only. 400 Therefore, our results must be generalised to other consumption markets to compare our results and provide more 401 general recommendations.

402 **5.** Conclusion

Labels are developing and diversifying in the FAPs sector. They are used to guide consumers toward more sustainable choices. Consequently, understanding how consumer preferences are structured regarding these different schemes has become essential, particularly in the context of the FAPs production system transition. By quantifying the demand for labelled FAPs on the French market and studying preferences for them in a multiple 407 choices situation, this article identified paths of reflection that can help public decision-makers to orient their future408 choices regarding public policies.

First, our results identified substantial heterogeneity regarding the preferences expressed. French consumers highly valued quality and "France origin" schemes. In a global manner, French consumers remain highly "self-oriented" in their preferences. Nevertheless, although secondary, ethical demand (ecolabel and animal welfare) could become dominant in the years to come, supported by the expectations of the young generation. To support this growing demand and reach global objectives of sustainable consumption, policymakers need to inform consumers and adapt their existing policies approach.

415 Despite diverse expectations, existing policies are often rigid and fail to reach their objectives. Our results 416 provide interesting insights regarding consumption profiles between stated preferences. They show the strong influence of motivations in the preference expressed regarding labelled FAPs. It seems that consumers' degree of 417 418 universalism and interest in the origin of FAPs are significant drivers of preferences. Moreover, socio-demographic 419 variables such as age, gender, and even living area influence the choices expressed. To implement more adaptive 420 and effective policies, better considering this diversity of consumption profiles is critical. The introduction of 421 systematic surveys regarding FAPs consumption expectations could be an interesting tool to implement. As food 422 markets are changing quickly (and so are consumer expectations), monitoring these expectations more regularly 423 could enable policymakers to anticipate changes in demand more accurately.

424 Applying this approach to multi-labelled FAPs could be a relevant extension to this study. In the context 425 of strong market competition and heterogeneous consumer preferences, the food sector increasingly uses the 426 "multi-labellisation" process. However, we still have limited knowledge of how consumers perceive and value 427 these new products, especially in the FAPs sector. New insights on this issue, such as the most valued label 428 combinations, the role played by motivations interactions, etc., could pave the way towards greater sustainability.

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APPENDIX

Table 6. Questions used to build the objective and subjective knowledge variables. (Source: COPECO-Covid-Norway survey- 2021)

Questions	Answers
Subjective knowledge	
Compared to the average person, I know a lot about	
fish	
I don't know much about how to assess the quality of	Likert scale from 0 (I totally disagree) to 7 (I totally
fish*	agree)
People who know me regard me as an expert on fish.	
I don't know much about preparing fish*	
Objective knowledge	
Farmed products and aquaculture products mean the	TRUE
same thing	IKOE
The production method (wild or farmed) is not	
compulsory information on seafood sold fresh in the	FALSE
French market	
Oils and meal from wild fish are used as feed for	TRUE
farmed fish	IROE
The majority of FAPs marketed in France are landed	FALSE
by small coastal vessels	FALSE

* The results of these questions have been reversed for the analysis.

Table 7. Detailed of the eleven variables included in the MMNL

Variables	Modality	Signification	Variable construction	Mean
	[18-34]	The individual is between 18 and 34 years old	Coded 1 if [18-34]	0.24
Age (Class reference	[35-49]	The individual is between 35 and 49 years old	Coded 1 if [35-49]	0.25
([18-34])	[50-64]	The individual is between 50 and 64 years old	Coded 1 if [50-64]	0.26
	[65+]	The individual is over 65 years old	Coded 1 if [65+]	0.25
Gender	Female	The individual is a female	Coded 1 if female, 0 if man	0.51
	Male	The individual is a male	Coded 1 if male, 0 if female	0.49
Children	Children	There is at least one child under 18 in the household	Coded 1 if children are present	0.44
Coastal department	Coastal Department	The individual lives in a coastal department	Coded 1 for people living in a coastal department	0.36
Price	Price	The consumer considers that price is her/his primary purchasing criterion when buying FAPs	Likert scale from 0 to 10	5.91
Universalism	Universalism	The individual shows a high degree of universalism	Factorisation of Schwartz value questions. Likert scale from 0 to 6	-9.65e-11
Tradition	Tradition	The individual is attached to traditional values	Factorisation of Schwartz value questions. Likert scale from 0 to 6	- 2.52e-09
Origin	Origin	The individual express interest in the origin of FAPs	Factorisation of consumers' preference questions. Likert scale from 0 to 6	-4.03e-10
Perceived consumer effectiveness	PCE	Individual's estimate of his or her ability to contribute to specific sustainable development- related outcomes through specific behaviors.	Factorisation of questions on consumer perceptions	-1.19e09
Subjective knowledge	Subj. Know	The individual considers himself/herself as an expert of the sector	Average score on multiples questions Likert scale from 0 to 7	3.28
Objective knowledge	Obj. Know	The individual is an expert of the sector	Average score on multiples questions	1.66

Labels 1	Quality	France origin	Ecolabel	Health allegation	Local origin	Animal Welfare	No Label	Fair- Trade	Nutrition	EU origin
Label 2										
Quality	Х	HO								
France origin	HO	Х								
Ecolabel			Х	H0	HO					
Health allegation			HO	Х	HO					
Local origin			HO	HO	Х					
Animal Welfare						Х				
No Label							Х			
Fair- Trade								Х		
Nutrition				•					Х	
EU origin										х

Table 8. Detailed results of the t-test. (Source: COPECO-Covid-Norway database - 2021)

Null Hypothesis (H0): means are equal. Alternative hypothesis (.): means are statistically different.

	Quality ^a	Fair-Trade ^a	Nutrition ^a	EU ^a
Nb. Indiv. (%)	254 (17.80)	91 (6.36)	75 (5.26)	36 (2.52)
Age (Ref [18-34])				
[35-49]	014 (.029)	.010 (0.21)	022 (.015)	008 (.015)
[50-64]	-0.15 (.030)	.012 (.020)	.011 (.019)	025* (.013)
[65+]	.001 (.020)	008 (.019)	.001 (.020)	018 (.015)
Female	026 (.022)	021 (.014)	.008 (.013)	004 (.009)
Coastal Department	.024 (.020)	004 (.013)	.008 (.012)	007 (.009)
Children	.043* (.023)	017 (.015)	.013 (.013)	.005 (.009)
Price	001 (.004)	003 (.003)	.001 (.003)	.003* (.002)
Motivations				
Universalism	040*** (.013)	.001 (.009)	002 (.007)	.006 (.009)
Tradition	.013 (.013)	.007 (.008)	.006 (.007)	.003 (.005)
Origin	030** (.014)	012 (.009)	029*** (.007)	.002 (.006)
РСЕ	003 (.015)	.036 ***(.011)	.009 (.008)	.008 (.007)
Subj. Knowl	.028*** (.010)	003 (.006)	001 (.006)	.004 (.004)
Obj. Knowl	.002 (.009)	002 (.006)	.003 (.005)	.002 (.004)

 Table 9. Mixed multinomial logit model marginal effects (Source: COPECO-Covid-Norway database - 2021)

^a Base alternative: No Label

Significance threshold: *** 0.01; ** 0.05; *0.1. In parentheses : Standard deviation Number of observations = 1.427