Are labels the answer?
Barriers to buying higher animal welfare products
A report for Defra

September 2010
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Executive Summary

Defra commissioned this research project to explore the apparent gap between consumers’ attitudes to animal welfare and their purchasing behaviour, and the potential role of a label in bridging this gap. This report summarises the findings of the project, which comprised a literature review, 10 focus groups conducted with 96 members of the UK public in February and March 2010, and a stakeholder workshop with members of the retail, NGO, consumer, policy and industry sectors.
Attitudes and barriers to higher animal welfare purchasing

- Although animal welfare is important to consumers in principle, this principle does not consistently translate into action within a purchasing context.

- There are a range of reasons why the welfare of animals is low on consumers’ list of priorities when they are food shopping. Firstly, the majority of consumers are primarily motivated by the tangible aspects of products of immediate relevance to them, such as appearance, taste and healthiness, rather than symbolic, altruistic aspects such as animal welfare. Secondly, there are a range of psychological barriers, such as wilful ignorance about animal production, that prevent engagement with the issue of animal welfare in the context of food shopping.

Effective communication of information about (higher) animal welfare to consumers

- These barriers around engagement with the issue mean that additional information on animal welfare is unlikely to be an effective ‘hook’ to encourage more people to buy higher welfare products.

- However, consumers already draw links between higher welfare and higher quality food: many assume that higher welfare standards go hand in hand with food that is healthier, tastier, and safer. Higher welfare standards are also associated in the minds of consumers with traceability: for many consumers, ‘local’ and ‘British’ are synonymous with ‘higher welfare’.

- The association between higher welfare and ‘good food’ could provide an effective basis for communicating with consumers about higher animal welfare standards. Situating the issue of animal welfare as part of a wider story about food, farming, and quality/‘good’ food may make information about higher animal welfare more accessible to consumers.

- Within this wider ‘good’ food and farming context, there is a need for a common standard against which to judge higher welfare claims. This would ensure that higher welfare claims translated into higher welfare standards; would build trust and confidence among consumers; and would provide consumers with a quick and easy way of incorporating consideration of animal welfare into decision making, without having to focus specifically on the issue.

- Any label designed to represent and communicate such a standard would have to be widely publicised in order to be recognised and understood by consumers.

Although animal welfare is important in principle, the principle does not translate into a purchasing context

Survey data suggest that the majority of people consider animal welfare to be an important issue. However, this relatively abstract principle of concern for animal welfare is not reflected in most people’s purchasing decisions: despite its reported importance, the welfare of animals is not a primary motivator of purchase decision making for most people, most of the time.
There are a range of reasons why the ethical principle does not consistently transfer into a purchasing context. Firstly, the topic of animal welfare is subject to ‘social desirability bias’: people tend to over-claim the importance of the issue in surveys, and respond to questions about it according to what they think is ‘the right thing to say’, which may be an exaggeration of their true opinion.

Secondly, a range of psychological barriers help explain why the ethical principle of concern for animal welfare is not carried over into a food purchasing context, including:

**Lack of engagement at point of purchase (awareness, time, habit...): ‘I’m too busy to think about it’**

M:  Most people are in such a hurry when they’re doing the shopping. You aren’t dawdling around the supermarket, are you?

Group 5, North West (urban), ‘Never buy higher welfare foods’

**Wilful ignorance: ‘I’d rather not think about it’**

M:  ...ultimately they are all going to meet, you know, their maker in the abattoir sadly, and I try not to think about that.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

**Transfer of responsibility: ‘It’s up to someone else to make sure it’s okay’**

F:  If they put stuff on the shelves, like factory eggs and stuff like that, I kind of think it can’t be that bad or it wouldn’t be legal for them to do it.

Group 10, East Anglia (rural), ‘Always buy higher welfare foods’

**Functional view of farm animals: ‘That’s what they’re there for’**

M:  I mean killing them is not the right thing to do really is it, but still.

F:  But then that is what they are for isn’t it.

M:  Yes, yes they are bred for that, aren’t they.

F:  They are bred for that aren’t they, really.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’
Competing priorities and low engagement with labelling in general

F: There are so many [labels] that, you know, who is actually going to go and look into precisely what each different, you know, company or whatever is actually doing and what their standards are; there are too many and no-one is going to do that.

Group 1, London, Positive Greens

Animal welfare as a stand-alone issue is not the ‘hook’ that will encourage more people to buy higher welfare products

These barriers push the issue of animal welfare down consumers’ hierarchy of priorities and mean that willingness to actually pay extra for higher animal welfare products is low. In practical terms, this means that animal welfare as a stand-alone issue is unlikely to provide an effective marketing ‘hook’ to encourage people to buy higher welfare products.

The links between higher animal welfare and better quality food may be the key to consumer engagement with the issue of animal welfare

Although the issue of animal welfare may not be a high priority for most consumers when they are food shopping, and most do not actively seek higher welfare products, many people are motivated by the product attributes that they associate with higher animal welfare, for example, improved (human) health, taste, and food safety.

Broadly speaking, ‘quality’ is a priority that many people seek and for which many are willing to pay extra. Perceptions of quality balanced against price are used to judge value for money – or ‘what I am getting for the extra money I’m paying’.

In the context of shopping for meat, eggs and dairy products, ‘quality’ is defined for the majority of people primarily by tangible benefits, such as the taste and nutritional ‘healthiness’ of the product and, particularly in the case of meat, by perceptions of food safety risk. Secondary to these tangible priorities are intangible, symbolic, or ethical considerations, such as animal welfare. Most consumers assume that higher welfare standards and quality go hand in hand: they use animal welfare as an indicator of product quality; and conversely, they use product quality as an indicator of higher welfare standards.

This suggests that the failure of the ethical principle of animal welfare to transfer to purchasing decisions may not necessarily be a barrier to people buying higher welfare products, since other attributes of food that is produced to higher welfare standards are primary motivators for many people.

Implications for welfare labelling

Animal welfare as a stand-alone ethical issue has limited traction with consumers

Competing priorities, along with the common psychological barriers around the issue of welfare, mean that communications strategies based on animal welfare as a single issue are unlikely to have much impact among the majority of shoppers. Furthermore, welfare labels tend to emphasise the symbolic, altruistic aspects of the issue, which are a low priority for
most consumers. In fact, it is the perceived tangible benefits provided by higher welfare foods that consumers are most interested in, motivated by, and willing to pay for. Those most likely to use a welfare label are the minority of actively ‘ethical’ shoppers. The majority rarely consider animal welfare in their purchasing decisions, and even when they do (or when it is brought to their attention), this is generally a secondary priority to tangible ‘quality’ considerations.

**Situating the issue of animal welfare as part of a wider story about food, farming, and quality/‘good’ food may make information about higher animal welfare more accessible to consumers**

Consumers tend to associate higher welfare standards with ‘good food’, and it is this broader vision of quality that is of most interest to consumers. This suggests that building on the links that people already perceive to exist between ‘quality’ and higher animal welfare may be an effective strategy of providing information about animal welfare to consumers in a way that is accessible to them. This integration of secondary, symbolic priorities with primary, tangible priorities would provide consumers with a ‘short cut’ to incorporating animal welfare into decision making, without requiring them to focus explicitly on the issue or to process detailed information about it.

**There is a need for a common standard against which to judge higher welfare claims**

If purchasing decisions are to be reflected in higher standards of welfare, there must be a common standard that ensures higher welfare claims are reflected by actual higher welfare standards. This need for a common understanding of ‘higher welfare’ is demonstrated by the simplistic link that many consumers draw between production system (e.g. free range) and welfare outcomes, which are not necessarily always aligned.

Furthermore, consumers require simple ‘beacons’ to communicate ideas, provide information and aid decision making. A common standard against which to judge higher welfare claims, which was consistent across retailers, would help consumers to incorporate animal welfare into their decision making and to have confidence that their action is making a real difference. The introduction of such a standard on its own would likely have only a limited impact, for the reasons outlined above. However, as one part of a wider communications approach, it could play an important part in encouraging purchases by building trust and confidence and providing consumers with a fixed reference point.

**A label associated with such a standard must be simple and well publicised**

Our message testing with focus group participants confirmed what we already know about labels: the most effective labels are simple, instantly recognisable, and instantly understandable. For the case of animal welfare, it would be important to take into account consumer resistance to information about the specific details of animal welfare, and a general preference for emotional, rather than informational, cues.

Finally, a concerted and consistent publicity effort around a label would be a necessary requirement to bring it to the attention of consumers and ensure that it was instantly recognisable and understandable. In the absence of these two conditions, any label would have limited impact in translating attitudes to animal welfare into purchasing behaviour.
Alternatives and options

A higher welfare label is just one option for encouraging purchases of higher welfare products, and there are various alternatives, plus a range of options that could work alongside a label. Options in this area may include:

- improving publicity around existing higher welfare labels, such as the RSPCA’s Freedom Food label, in order to extend its reach and market share;
- working with retailers to promote higher welfare products or to build higher welfare standards into own-brand product lines (particularly premium lines);
- choice editing: the IGD (2007) reports that, “Consumers are supportive of higher welfare in principle, and would prefer choice editing to having a choice between higher welfare and standard foods”, and our focus groups corroborated this picture;
- education: expert stakeholders suggested that a lack of engagement with the issue of animal welfare (and therefore low willingness to pay for welfare attributes) is partly due to a disconnection with, and lack of understanding of, food and farming in general. Education, including in schools, is a necessary step in increasing engagement, awareness and interest in the issue;

Consumer-led initiatives such as labelling would be most effective in the context of wider changes that ensure that standards of animal welfare in the UK continue to be world-leading. There is therefore a clear role for government in underpinning all of the available options, by continuing to define, monitor and improve standards where necessary, as well as providing the guidance and operational framework required for voluntary agreements around higher welfare labelling schemes.
1 Introduction

This research, designed and delivered by Brook Lyndhurst, was commissioned by Defra to investigate consumer motivations and barriers around purchasing higher animal welfare food products. Evidence shows that, although a majority of consumers report high levels of concern for animal welfare, this concern is often not reflected in purchasing decisions. This research was commissioned to deliver insight into the apparent gap between consumer values and action around animal welfare, and to provide a basis for developing effective means of communicating with consumer about animal welfare.

This report presents the findings of a review of existing evidence and 10 focus groups with 96 members of the English general public conducted during February and March 2010. At the end of the project, the research findings were presented for discussion to a stakeholder group, including members of the retail, NGO, consumer, policy and industry sectors. Annex 8 contains a summary of this workshop, and the outcomes of the day have been incorporated into the discussion in the final section.

1.1 Background

Policy context
The Animal Welfare Delivery Strategy published by Defra in 2007 included the goal of ensuring that:

"Economic markets function effectively and transparently, allowing customers to make informed choices based on animal welfare standards."

A specific action set out in the Strategy to achieve this goal is to ensure that consumers have sufficient information on welfare standards to make informed choices based on their values and preferences. These strategic objectives fit into a wider EU context: the European Commission’s policy goal in this area is:

"To make it easier for consumers to identify and choose higher animal welfare products, thereby giving an economic incentive to producers and EU citizens to improve the welfare of animals."

In line with this policy goal, the EU Community Action Plan on the Protection and Welfare of Animals 2006-2010 envisaged the introduction of standardised welfare indicators and an EU-wide welfare labelling scheme. As a next step in the Plan, in October 2009, the European Commission adopted the Report on animal welfare labelling and the establishment of a European Network of Reference Centres for the protection and welfare of animals, which outlines a series of issues and options for animal welfare labelling and communication.
High reported concern for animal welfare

When asked about the importance of animal welfare in surveys, the answer given by the general public in the UK (and in the EU) is unequivocal: animal welfare is an important concern:

- On a scale of 1 to 10, where 10 is most important, UK respondents rated animal welfare at 7.8 (EC, 2007);
- 67% of UK consumers thought that animal welfare is important (IGD, 2007);
- 68% of respondents in Scotland were either ‘strongly concerned’ (20%) or ‘concerned’ (48%) about animal welfare (McEachern et al, 2007);
- 86% of Dutch respondents were ‘very concerned’ (41%) or ‘somewhat concerned’ (45%) about animal welfare (Frewer et al, 2005).

Survey data also paint a picture of this high level of concern for the welfare of animals being translated into purchasing decisions among a large number of consumers. Animal welfare, as a product attribute, is reported by consumers to be a more important influence than whether a product is organic, locally produced, environmentally friendly or ‘ethical’ (e.g. fair trade) (Brook Lyndhurst, 2004; IGD, 2010). On the basis of its consumer research, the IGD reports that animal welfare is in the top ten drivers of product choice (IGD, 2010), and 72% of UK consumers say they regard animal welfare as an important consideration when they buy chicken (RSPCA, 2006). The Eurobarometer (2007) showed that, at the EU level, 43% of consumers claim to bear in mind animal welfare when buying meat.

Little action based on reported concern

The survey evidence about the reported importance of animal welfare does not, however, translate into a large market share for higher animal welfare products. Although the market for higher welfare schemes, such as the RSPCA’s Freedom Food, has grown during the 8 years to 2010 (Mintel, 2006; IGD, 2010; RSPCA, 2010; Business Insights, 2007), in 2006 the RSPCA estimated that just 1.7% of chickens reared in the UK were reared under the Freedom Food scheme, and 0.14% of chickens were reared organically.

There is also a discrepancy between consumers’ reported concerns about animal welfare, and industry perceptions of those concerns: a survey of industry executives in 2007 showed that the industry saw ‘animal welfare’ as low on consumers’ list of priorities (7th out of 8), and expected it to continue to be overshadowed by attributes such as ‘quality/taste’, ‘food safety’ and ‘reduced packaging’ over the next five years (Business Insights, 2007).

The literature provides a range of estimates of the proportion of consumers who report that concern for animal welfare influences their food purchasing decisions.

- 3% of Scottish consumers polled in one study cited animal welfare as their most important motivation, and 4% reported an intention to purchase ‘welfare friendly’ products (McEachern et al, 2007; McEachern and Warnaby, 2008).
- According to IGD research (2007), 10% of UK consumers identify themselves as higher welfare purchasers, claiming to buy all higher animal welfare products within their weekly shop. At the other end of the spectrum, 36% say they buy no higher

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1 IGD (2010) reports that interest in social and animal welfare issues did not wane during the recent recession.
2 Organic certification, in accordance with EU Regulation 2092/92, includes various factors, such as lower stocking density, that are often associated with higher welfare standards.
welfare foods. 11% of respondents in that study said they had specifically purchased higher animal welfare products in the last month. Another source found that 13% of consumers claimed to purchase higher animal welfare products ‘as often as possible’, while 36% said they did so ‘often or ‘sometimes’, and 52% said they ‘never’ or ‘rarely’ knowingly buy higher welfare products (Brook Lyndhurst, 2004).

The sum of this evidence suggests that a minority - albeit, in some cases, a significant minority - reports choosing higher welfare products as a way of realising their views on animal welfare. However, the reported concern of the majority does not seem to translate into purchasing decisions for the majority. The focus of this research was to explain this apparent gap between the high proportion of people claiming to be concerned about animal welfare, and the low proportion of people who take specific action in the supermarket in accordance with their views. Explaining what lies at the basis of this apparent gap is a first step in developing policy and communications that are targeted at bridging it.

1.2 Research framework

The focus of this research was on the market for higher animal welfare products, and the barriers that may prevent some consumers, particularly those who wish to make higher welfare choices, acting in accordance with their views on animal welfare.

The first aim of the research was to characterise the extent and nature of demand for higher animal welfare foods. To establish whether there is genuine untapped demand for higher welfare products among UK consumers, Brook Lyndhurst designed a programme of qualitative research to explore motivations and barriers around higher welfare purchasing. The research also set out to investigate the role of one particular tool – labelling – in overcoming barriers and encouraging purchases of higher animal welfare food products.

The research aimed to provide evidence around the following questions:

- Is there genuine untapped demand for higher welfare products?
- If so, can we identify and target certain sectors of consumers to reduce the gap between motivation to buy higher welfare products and willingness to act? For example, for those consumers who already buy some higher welfare products, how can we encourage them to increase the amount they purchase?
- For those consumers who are concerned about animal welfare but do not follow this with purchases of higher welfare products, how can we assist them in translating their views into action?
- What are the key barriers within these consumer segments to reducing the gap?
- What is the role of a welfare food label in overcoming the barriers to purchasing higher welfare products?
- If an animal welfare label is the preferred route to overcoming barriers to consumers purchasing higher welfare products, what are some of the options for labelling?

A secondary research question explored during the project was the extent to which attitudes and behaviours around purchasing higher animal welfare food products coincide or overlap with Defra’s environmental segmentation model. The segmentation model, which provides a
framework for understanding pro-environmental attitudes and behaviours, is based on Defra’s 2007 survey into Public attitudes and behaviours towards the environment. This survey included a section on purchasing behaviours, which included both environmental purchasing and animal welfare purchasing, including how often respondents reported making a conscious effort to buy products carrying welfare-related labels such as organic, Red Tractor, and Freedom Food. Testing the proposed possible link between pro-environmental attitudes and behaviours, and propensity to purchase higher animal welfare products, was also included in the aims of the research. If such a link were found to exist, the segmentation model could provide a useful tool for understanding the landscape of demand for higher animal welfare products, and for the development of policy and communications around animal welfare.

Definitions of (higher) animal welfare
Animal welfare is a notoriously difficult concept to define, from both a philosophical and practical point of view. A widely used definition of animal welfare was developed by the Farm Animal Welfare Council, and consists of the following five freedoms:

- Freedom from hunger and thirst;
- Freedom from thermal and physical discomfort;
- Freedom from pain, injury and disease;
- Freedom from fear and stress; and
- Freedom to express normal behaviour.

Some components of the five freedoms, such as freedom from injury and disease, may be relatively easy to objectively measure and monitor, while others, such as the fifth freedom (freedom from fear and stress), may be more open to interpretation. As such, animal welfare is defined differently by different stakeholders and remains a controversial area.

In the absence of objective standards, definitions of ‘higher’ animal welfare can consequently be ambiguous, unstable, or incorrect, in the minds of consumers. For example, production systems such as free range are assumed by consumers to provide higher welfare standards than ‘intensive’ production systems (see e.g. de Boer et al, 2009; Schroder and McEachern, 2004), although in reality there is no necessary connection between production system and welfare outcomes.

One aim of the research was to explore how consumers themselves understand and define (higher) animal welfare. The qualitative approach of the fieldwork allowed us to explore the issue in a non-prescriptive way, based on consumers’ own definitions and ideas. The research findings in this report are therefore presented in accordance with these participant-led definitions, even where they are inaccurate (for example, where participants’ statements are based on an assumed link between production systems and welfare standards, we have reported this). This research, which is a piece of consumer insight work, takes no view and makes no argument about definitions of welfare and higher welfare.

1.3 Methodology
The research was conducted in the following phases:

- An evidence review;
- Primary research (10 focus groups with a range of consumer segments); and
• A workshop with stakeholders from the policy, NGO, industry, consumer and retail sectors.

Evidence review

This phase of research was designed as a rapid review of existing evidence. Its aim was to synthesise existing evidence in order to ensure that the primary research built on what is already known.

A scoping exercise was performed to develop a long-list of evidence from academic, industry and grey literatures. These sources were prioritised for review based on their relevance to the core aims of the project, and findings from in-depth reviews were structured according to the research questions set out in section 1 of this report. Over 60 sources were reviewed; a full bibliography can be found in annex 1.

Primary research (focus groups)

10 focus groups were conducted with 96 members of the general public in February and March 2010.

Round 1: four focus groups with Positive Greens and Concerned Consumers

As set out in section 1.2 above, one aim of the research was to test the possible link between pro-environmental attitudes and behaviours, and propensity to buy higher animal welfare products. The methodology for the qualitative fieldwork utilised Defra’s environmental behaviours segmentation model as a framework for exploring these possible links.

Initial analysis of Defra’s (2007) Environmental attitudes and behaviours survey showed that Positive Greens claim to purchase higher animal welfare products more frequently than other Defra segments, and Concerned Consumers are also relatively likely to claim to make a conscious effort to buy welfare-labelled products (see section 2.4 for more details). The first round of groups focused on these two segments, in order to explore the attitudes and motivations of those who already buy some animal welfare products.

The aim of the first round of focus groups was to explore the extent of untapped demand for higher animal welfare products among these segments through an in-depth exploration of attitudes, motivations and barriers. The groups were designed to:

• Establish the importance of animal welfare relative to other considerations (both values-based attributes, such as sustainability, and other product attributes, such as price);
• Explore the ways in which participants related to higher animal welfare products and, in particular, the product characteristics they saw as being most closely linked to higher animal welfare products;
• Investigate how this understanding influenced their attitudes, motivations and barriers to buying higher welfare products; and
• Provide an initial exploration of the role (actual and potential) of labels and other types of information provision in helping consumers to make informed decisions about higher animal welfare products.
The focus groups were held in a mixture of urban and rural locations to ensure a wide range of people and views were captured. The four locations were London (urban), Liverpool (urban), Somerset (rural) and Norfolk (rural). The final recruitment profiles of participants may be found in annex 3 of this report. The full topic guide for the first round of focus groups can be found in annex 4 at the end of this report.

**Round 2: Six focus groups with groups based on their reported propensity to buy higher animal welfare products**

The second round of focus groups took place after an analysis of the findings of the first round and an identification of key themes for further exploration. Participants for this round of groups were recruited on the basis of their claimed propensity to buy higher animal welfare foods, including those who claimed to buy higher animal welfare products:

- ‘always’;
- ‘often/always’;
- ‘sometimes/occasionally’; and
- ‘never’.

The aim of the second round of groups was to explore the differences in attitudes, motivations and barriers that existed between these different segments of the population, with a view to clarifying the nature of the antecedents (values, beliefs, knowledge, understanding, attitudes, habits and so on) of reported behaviour patterns, and applying this insight to communications options. The second half of each second round group was devoted to the testing of communications around animal welfare with the different consumer segments, including messages and labels. A full topic guide can be found in annex 5 at the end of this report.

For comparability across the two rounds of groups, the rural/urban divide was maintained. In addition, each participant in the second round was asked, at the end of the group, to complete a short questionnaire to establish their profile in terms of Defra’s environmental segmentation model.

For both rounds of groups, the recruitment questionnaire was designed to avoid priming participants on the issue of animal welfare. The research was introduced to potential participants as a study about “why people do and do not buy certain food products, and how different types of food label influence their purchasing decisions.” The first round was recruited according to Defra segment. The second round recruitment questionnaire included, in addition to questions about frequency of higher animal welfare purchases, questions about various purchasing habits including the frequency of buying fair trade products, and loose (rather than pre-packed) fruit and vegetables.

Loose minimum quotas for socio-economic group and age were set to ensure a range of participants, but the final configuration of these characteristics was determined principally by participants’ reported propensity to buy higher welfare products. The profile of participants, along with recruitment specifications, can be found in annex 3 of this report.

**Limitations**

Our sampling/recruitment strategy for this work did not entail recruiting a representative sample of participants; rather, we used a ‘purposive’ sampling technique whereby we
recruited participants according to specific characteristics that were relevant to our inquiry (although we did ensure that a range of age groups, socio-economic groups and household types were represented). Therefore, the findings must be treated as a ‘snapshot’, and should not be taken as representative of the wider UK population. Furthermore, it is not possible on the basis of this work to define, in a robust way, the effects of some of the underlying drivers of attitudes and behaviours towards animal welfare, such as socio-economic background or regional (e.g. rural/urban) effects.

Another limitation of the project, common to most work on this issue, is the difficulty of defining (higher) animal welfare: as discussed above, there is no stable, objective definition of what higher animal welfare is, or how it may be measured. This issue was highlighted both by focus group participants and stakeholders at the final workshop, some of whom considered British legislative standards to represent higher welfare; while others in the group held different opinions on which of the available standards represent higher (or high enough) welfare standards.

The scope of this project did not extend to considering definitional issues above and beyond those that already exist in EU and UK law. However, consideration of how different standards of welfare are defined, and by whom, provides important context for the work, and is discussed in section 5 of this report.
2 Is there genuine untapped demand for higher animal welfare products?

The evidence presented in section 1.1 suggests a discrepancy between reported concern for animal welfare, on one hand, and action based on this concern, on the other. In addition to this apparent gap, the variation in findings from different sources suggests that there is a range of complex factors underlying attitudes and behaviours around higher animal welfare purchasing. A central aim of this research was to provide qualitative insight into the patterns that emerge from the wider evidence in this area.

This section draws on the findings of the evidence review and primary research to explore the key research question of whether there is genuine untapped demand for higher animal welfare products, and the factors that may help explain the gap between reported attitudes and actual behaviours.

These broad questions have been broken down into the following components:

- How important is higher animal welfare relative to other product attributes?
- What motivates people to buy higher animal welfare products?
  - What links and associations do people make to other products and issues?
  - How do people understand 'higher animal welfare'?
  - For those who already buy some higher welfare products, why do they do so?
- What are the barriers to buying higher animal welfare products?
  - Is there a genuine ‘value-action gap’, and if so, how can we explain it?
- Can we identify differences between consumer segments?

2.1 Baseline attitudes and values: how important is animal welfare?

As a precursor to more in-depth discussions, and to prepare the ground for an investigation of the purported gap between reported attitudes and purchasing behaviours (or the ‘value-action’ gap), some simple preliminary exercises were conducted with discussion group participants in order to gauge baseline values and attitudes. The aim of these preliminary exercises was to explore unprompted attitudes towards animal welfare, before participants were ‘primed’ to the issue.

Spontaneous reference to animal welfare

The first exercise conducted during the first-round focus groups was a group brainstorming exercise on the following question:

"Imagine you’re in the supermarket (or wherever you do your food shopping) and you’re buying some [tomatoes/eggs/..."
What kinds of things are you thinking about to help you decide what to buy? What are you looking for? What influences your choice?”

The aim of this exercise was to explore whether participants mentioned animal welfare in a spontaneous, unprompted situation. The table below shows the results of a content analysis of the types of considerations people mentioned spontaneously across the different product types.

### Table 1 – Influences in the supermarket

<table>
<thead>
<tr>
<th>Reported influence at point of purchase</th>
<th>Number of appearances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical attributes (size, colour, type, appearance, smell, freshness, cleanliness)</td>
<td>38</td>
</tr>
<tr>
<td>Price</td>
<td>12</td>
</tr>
<tr>
<td>Origin</td>
<td>7</td>
</tr>
<tr>
<td>Date label</td>
<td>6</td>
</tr>
<tr>
<td>Packaging</td>
<td>5</td>
</tr>
<tr>
<td>Free range</td>
<td>4</td>
</tr>
<tr>
<td>Function</td>
<td>4</td>
</tr>
<tr>
<td>Organic</td>
<td>3</td>
</tr>
<tr>
<td>Dietary</td>
<td>2</td>
</tr>
<tr>
<td>Fair trade</td>
<td>1</td>
</tr>
<tr>
<td>Upbringing</td>
<td>1</td>
</tr>
<tr>
<td>Habit</td>
<td>1</td>
</tr>
</tbody>
</table>

The physical or observable attributes of products were, overall, the most common considerations mentioned by participants. This lends support to IGD (2007)’s finding that consumers tend to rely on ‘external’ cues (e.g. appearance) rather than ‘internal’ cues (e.g. values or attitudes towards how the food was produced) to make decisions. ‘Free range’ was reported as a common consideration for eggs and chicken, and organic came up across the groups. Production systems such as free range and organic are often associated by consumers with higher welfare (McEachern and Warnaby, 2008; IGD, 2007; Business Insights, 2007); however, the welfare of animals was not explicitly mentioned by any group at this stage.

This exercise was designed to encourage participants to start thinking about their purchasing habits, and to explore whether ideas around animal welfare came up spontaneously, and if so, how they were framed by participants. It also provides context for subsequent exercises.

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3 Each group considered the different product types in a different order. Tomatoes, a non-animal product, were included in this exercise to avoid priming participants on the subject of animal products and animal welfare.
and in-depth discussions, which in turn shed light on the results of this exercise (for further discussion see below).

**Reported importance of animal welfare relative to other product attributes**

During both rounds of focus groups, participants’ views on the relative importance of animal welfare as a product attribute were collected. These exercises were conducted before the issue of animal welfare was specifically introduced to participants: at this stage, participants only knew that the research was about “why people do and don’t buy certain foods, and the influence of different labels.”

In round 1, each individual participant completed a ‘pairwise’ ranking exercise on a small number of product attributes: each person was given a list of pairs of values-based product attributes, based on the six product attributes shown in the matrix below (for example, the first pair in the list was {locally produced vs low packaging}; the second pair was {organic vs low packaging}, and so on). Each person was asked to indicate which attribute in each pair they considered most important.

![Figure 1 – Pairwise ranking permutations](image)

Ranking the attributes in order of the number of times they were selected as the most important of each pair reveals the overall relative importance ascribed to each attribute.

The results from all 40 participants who completed the pairwise ranking exercise are shown below.
As the graph above shows, the results of these exercises reflect the findings of the literature, with animal welfare ranking as a highly important product attribute.

A similar exercise in the second round of focus groups, which again explored the relative importance of animal welfare within a larger set of attributes, confirms this picture. First, participants were asked to rate the importance of a set of values-based product attributes on a scale of 1 – 7, where 7 was ‘very important’ and 1 was ‘not at all important’. Second, they were asked how often consideration of each attribute influenced what they decided to buy. The results show that animal welfare again ranks highly in both the ‘importance’ and ‘influence’ questions.

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4 The y axis shows the number of times each attribute was chosen as the most important of a pair. If an attribute had been chosen as most important every time by all participants, it could have scored a maximum of 200.

5 A slightly different (but overlapping) set of attributes was used in the second round. The first round exercise was limited in the number of attributes that could be used due to the nature of the pairwise ranking exercise. In the second round, we included a number of ‘extra’ attributes that had been excluded from the first round due to time and space constraints imposed by the pairwise ranking.

6 This was a rating, rather than a ranking exercise – that is, participants could have rated every consideration at 7 – very important or 1 – not at all important, if they wished.
2.2 What motivates people to buy higher animal welfare products?

Associations around higher animal welfare products

One method used to investigate the motivations of participants was a technique known as the multiple sorting procedure. This exercise, conducted during the first round of groups, allowed us to explore the associations that participants made between animal welfare and...
other values-based product attributes (see table 2). The multiple sorting procedure is a qualitative methodology rooted in psychological theory, which requires participants to sort a set of elements (in this case values-based product attributes) into different categories. The aim of this exercise was to gain a deeper understanding of how participants understood animal welfare and its relationships with other considerations.

“...the conceptual framework of constructs and the categories on which the respondent draws are...the starting point for understanding the respondent’s action in the world.”

(Canter, 1985)

By understanding where animal welfare is ‘located’ within a wider context, and by then exploring the relative importance of the elements of those different associations, we can begin to build a picture of which are the central considerations in decision making. A full methodology and further results for the sorting exercise can be found in annex 6.

Participants were invited, in pairs, to sort the considerations shown in Table 2 into categories or groups, such that the ‘similar’ considerations were together. Participants were also asked to name each category according to why they had grouped those considerations together as similar. Participants were then asked to repeat the sort with different categorisations. In this kind of exercise, first sorts tend to represent the most spontaneous categorisations, while second sorts represent groupings at a slightly more reasoned, thoughtful level. The aim of the exercise was to explore how participants mentally categorised animal welfare, and the associations they drew with other product attributes or purchasing considerations. This exercise was conducted before animal welfare was introduced as the focus of the discussion.
Table 2 – Multiple sorting exercise cards

<table>
<thead>
<tr>
<th>Locally produced</th>
<th>Fair trade</th>
<th>Animal welfare</th>
<th>British</th>
<th>Rainforest Alliance Certified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country of origin</td>
<td>Packaging</td>
<td>Free range</td>
<td>Food miles</td>
<td></td>
</tr>
<tr>
<td>Healthy eating</td>
<td>Corn fed</td>
<td>Carbon footprint</td>
<td>Organic</td>
<td></td>
</tr>
</tbody>
</table>
Results of the card sort were analysed using multiple scalogram analysis. This analytical technique draws out the patterns emerging from the ways in which people sorted the considerations, and what participants tended to view as most ‘similar’. The result of multiple scalogram analysis is a visual representation of the conceptual proximity (or distance) between different considerations: the closer two items are to one another on the scalogram, the more similar they were considered to be (and therefore the more often they were grouped together) by participants. The further items are from one another, the greater the ‘conceptual space’ between them in the minds of participants.

Analysis of why participants grouped particular attributes together provides the basis for interpreting the scalogram and identifying the patterns in the categorisations. This process was conducted separately by two independent analysts, with the aim of minimising the effects of researcher bias in identifying the patterns in participants’ categorisations and descriptions.

The scalogram below gives an overview of the patterns that emerged from analysis of all sorts conducted by all participants. The labels on the plot are drawn from the category descriptions generated by participants, translated into ‘generic’ category types by the research team for parsimony.

**Figure 4 – Patterns emerging from the sorting exercise – all groups, all sorts**
The plot in Figure 4 shows that a number of separate categories emerged from the sorts. The plot shows both first and second sorts, since the patterns that emerged were consistent across the two.

The strong association drawn by participants between ‘health’ (i.e. human health) and ‘animal welfare’ is clearly visible at the top of the plot. It is striking that this ‘health’/‘animal welfare’ category is clearly distinguished from the other considerations. The stability of this category across first and second sorts suggests that the link to human health is a top of mind, spontaneous response for many people, as well an association that is drawn at a more reasoned level. The plot also demonstrates the links participants made between production systems and welfare standards (note the proximity of ‘free range’ and ‘organic’ to ‘animal welfare’).

At the opposite side of the plot to the ‘(human) health’/‘animal welfare’ category is the ‘environment’ category, which shows that these considerations were grouped together least often. Bridging the divide between ‘health’/‘animal welfare’ and ‘environment’/‘international development’ categories is the small ‘locally produced’/‘British’ group.

The central location of the ‘local’/‘British’ category reflects a contrast between rural and urban participants: rural participants tended to categorise ‘local’/‘British’ with the ‘health’/‘welfare’
Subsequent discussions during the focus groups, along with insights from the literature, help us to understand these categorisations, the associations participants drew between different considerations, and, within these associational networks, which considerations are the primary motivations of decision making. The central themes are outlined below.

**Quality – healthiness - taste**

There is consensus in the literature that ‘quality’ is one of the most important drivers of purchasing decisions, in general and for animal products more specifically (e.g. Olesen et al, 2010; Ipsos MORI, 2009; McEachern and Warnaby, 2008; IGD, 2007; Business Insights, 2007; EC, 2007; Binnekamp and Ingenbleek, 2006; Frewer et al, 2005; Nilsson et al, 2004; Harper and Makatouni, 2002). This theme emerges consistently from studies that are specifically focused on consumer attitudes and behaviours towards animal welfare, as well as more general studies about consumer food choices. Market research by the IGD (2010) found that, during the economic downturn of 2008-2010, ‘quality’ remained the product attribute for which most people reported being prepared to pay more.

The ways in which consumers define and judge quality, and the associations drawn between quality and welfare standards, are complex. Price is a key cue that consumers use to judge quality: a higher price is often automatically associated with higher quality and, in the minds of many consumers, with higher animal welfare standards (IGD, 2007; Ipsos MORI, 2007).

*F: I just think the more expensive the meat the better it is, the better the condition the animal has been kept in. I can’t always afford the best prices, so I never buy value but I go for the middle sort of range.*

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

The idea of ‘food standards’ came up frequently during the focus groups as an important basis of quality. The importance of ‘standards’ (including the conditions animals are kept in) was often expressed in terms of the nutritional healthiness of a product, and reduced food safety risk. The health motivation emerged from the focus groups and the literature as a primary concern among consumers (e.g. Ipsos MORI, 2010; de Boer et al, 2009; McEachern et al, 2007; RSPCA, 2006; Mintel, 2006; Frewer et al, 2005). A recent survey for the FSA asked respondents what was important to them when deciding what to eat at home. Answers, which were selected from a pre-defined list, included health (60%), price/value for money (55%), locally grown (26%) and animal welfare (21%) (GfKNOP, 2009).

Perceived healthiness of animal products is associated in the minds of many consumers with the health of the animal, and this link seems to be a central reason why people report animal welfare as being of such high importance. Evidence in the literature suggests that, when considering animal welfare standards, for many consumers the link to human health is stronger than the link to animal health (Kjaernes et al, 2007; EC, 2007). Focus group evidence also supported the suggestion that personal health is a higher priority for most people than animal health. Again, standards of health (human and animal), safety and...
nutritional value are linked by consumers to particular production systems (Business Insights, 2007).

The primacy of the health motivation for consumers is well known to marketers of animal products. It is interesting to note that of all the dimensions of organic certification – which includes environmental and higher animal welfare attributes – many organic brands such as Yeo Valley have employed health messages as their marketing ‘hook’ (Mintel, 2006).

Another important dimension of the perceived better quality of higher animal welfare food products is the taste of the product: consumers have an expectation that higher animal welfare products taste better, and this is an important part of the basis of expressed preferences for higher welfare foods (e.g. de Boer et al, 2009; EC, 2007; RSPCA, 2006; Harper and Henson, 2001). The motivation of ‘better taste’ was frequently cited by focus group participants, and was linked to the health and welfare of the animal.

F: You actually get a better taste of meat.
F: You do, I was just about to say it is better tasting.
M: Yes.
W: They are eating fresh grass and fresh food.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

When asked why they bought (or would like to buy) higher animal welfare products, focus group participants’ primary motivations were frequently located in this quality-health-taste nexus. Concern for animal welfare was secondary to concerns that were more personal, tangible and immediate, such as getting value for money by buying quality products, and thereby achieving benefits such as improved healthiness and taste. Although animal welfare was associated with these attributes for many people, they did not report it as a primary motivation, but rather an extra bonus of buying quality, healthy, tasty foods.

How and where animals are reared

Other studies in this area have found that consumers perceive a direct link between the quality of meat and production systems, with extensive and organic systems viewed as resulting in stronger and better flavours (Ngapo et al, 2003), and intensive systems often associated with a poorer quality product (Harper and Henson, 2001). This belief was widespread among our focus group participants.

M: And they always say free range on them, and you always associate free range with being better quality

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

Confirming evidence from other studies, many of our focus group participants also expressed the belief that meat and dairy products from their own country are of a higher quality, which is associated with a belief that their country’s standards (of welfare, safety and so on) are the best (Ipsos MORI, 2007; McEachern and Schroder, 2004; Ngapo et al, 2003). (Harper and Henson, 2001).
Are labels the answer? Barriers to bring higher welfare products | A report for Defra
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**F:** Because it is British you think they are fed properly and they are not given like the extra water or the extra bits to make them grow.

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Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

It is suggested in the literature that this preference for animal products from one’s own country is partly due to simple patriotism, but also perhaps due to a view that shorter supply chains allow for more transparency in terms of the all-important ‘standards’ (FSA, 2010). Our focus group participants’ views on the subject add weight to this suggestion, indicating that perceptions of quality are underpinned by trust and confidence in food and food supply chains in general.

Overall, the quality-health-taste associative network, with its links to production systems, provenance and traceability, dominated discussions of higher animal welfare products. These principally self-interested benefits of higher animal welfare are highlighted in the literature, and were the first, most top-of-mind considerations mentioned by most focus group participants. However, although self interest seems to be most people’s primary motivation, more in-depth discussion revealed complexes of underlying motivations linked to a variety of values, beliefs and attitudes, not all of which were entirely self-interested, and many of which related to more intangible and symbolic benefits.

**Moral responsibility**

Some surveys find ethical considerations to be a motivation for some consumers: for example, 11% of EU consumers placed “better for society” in their top three motivations for buying higher welfare products (EC, 2007); and one in three respondents, when asked “what does ethical food mean to you?” cited concern for animal welfare (Mintel, 2006). In general the literature suggests that consumers are becoming increasingly interested in ‘extrinsic quality attributes’ (Frewer et al, 2005). That is to say, symbolic or intangible values increasingly feature in definitions of ‘quality’, and willingness to pay for that intangible value is also increasing (Mintel, 2006).

In-depth discussion in the focus groups revealed that some participants did feel moral responsibility towards farm animals, although this was not spontaneously expressed by most.

**F:** How we treat animals shows us what we are as human beings at the end of the day

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Group 7, London, Usually/often buy higher welfare foods

It is suggested in the literature that ethical concerns are expressed as “an extension of one’s self image”, but are often contingent upon tangible, self interested benefits, which function as ‘clarifiers’ of the more symbolic benefits (Harper and Makatouni, 2002). In other words, a hierarchy of priorities seems to be in operation for many people, whereby tangible benefits must be in place before the more intangible benefits are considered. For many of our focus group participants, moral responsibility was indeed closely associated with more tangible benefits such as quality, health and taste.
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M: But then I don’t buy a ‘smart buy’ chicken because it is kept badly. I will spend, and even the meat as a budget shopper, I will spend the extra to make sure.

Q: For what reason?
F: Taste.
M: For that reason, well taste as well but for the same reason I won’t want to, I wouldn’t buy from caged chickens. Because it’s not right.
F: I don’t think you enjoy it as much, I think budget chicken in particular, doesn’t taste that great and it is just knowing the background of it, you just don’t enjoy it. I would rather have it less frequently.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

The suggestion from this participant that her emotional response to food affects her enjoyment of that food highlights the importance of the symbolic, intangible associations around higher welfare products. The ‘feel good factor’, or sense of worth, associated with buying products that represent more symbolic values – such as “considering animal welfare, supporting local farmers, and eating truly authentic food” (Ipsos MORI, 2010) – is, although secondary to more tangible considerations, an important motivation for many people.

F: Just what you were saying about the living conditions, just makes you feel better like you are doing it right by the animal. It just makes you feel good.

Group 7, London, Usually/often buy higher welfare foods

The idea of ‘truly authentic food’ touches again on the idea of trust and confidence in the supply chain – ‘quality’ food for many people is bound up with a perceived connection to where food has come from, including the animals and people involved in producing that food.

Discussion: motivations for buying higher animal welfare products

A preliminary objective of the focus group work was to explore participants’ motivations for buying higher animal welfare products. This exploration would give us a basis for understanding whether there is untapped demand for higher animal welfare products, the nature of that demand, as well as the barriers to action.

A central finding of both the literature and the focus groups is that, despite its reported importance, animal welfare is not, in most cases, a primary driver of purchasing decisions. Primary motivations for buying higher animal welfare products centred around the personally relevant benefits of ‘quality’ products, principally the health, safety and taste benefits. Altruistic and symbolic motivations, including animal welfare itself, were buried deeper and only emerged on in-depth probing. In addition, moral drivers were rarely expressed purely in terms of ethical considerations, but were strongly linked to (the literature suggests even dependent upon) tangible ‘quality’ factors.

The ways in which consumers define and judge quality are complex. In the case of animal products, quality is principally judged on tangible factors such as the physical appearance
and taste of a product. Animal welfare was rarely treated by participants as a stand-alone factor, but was inextricably linked to a network of other attributes. Within the context of these associated concerns and attributes, animal welfare rarely featured as a priority driver. Even those people who claim to always buy higher welfare products (including things like free range products), may not do so because they are motivated specifically by the welfare of the animal, but because animal welfare is one (secondary) part of the quality package they seek. Animal welfare, in practice, is valued primarily for the product quality and safety benefits it delivers, and only secondarily for ethical or moral reasons.

The difference between abstract ethical principles and priority considerations in a purchasing context may go some way to explaining the apparent gap between survey results and sales figures. It is possible that in surveys, respondents answer questions about animal welfare based on abstract moral principles which are overridden in a practical purchasing context by other, competing considerations. Added to this, the issue of animal welfare may be particularly prone to social desirability bias (saying the ‘right thing’), which further compounds the gaps between reported abstract values, actual practical considerations when shopping, and purchasing behaviours.

It therefore seems that the crucial gap to explore may be the one between people’s claimed values outside of a food purchasing context, and their actual motivations within the food purchasing context. The next section presents findings from the literature and focus groups on the nature of the barriers that may help us to explain why reported abstract values do not consistently translate into purchasing motivations; and why purchasing decisions do not reflect these widely reported values.

2.3 What are the key barriers to buying higher animal welfare products?

The evidence presented in the previous sections has demonstrated that, for most people, animal welfare is not a stand-alone consideration, and not a primary driver of decision making. The question remains why this discrepancy exists between the reported ‘in principle’ importance of animal welfare and its low profile at the point of purchase.

M: Yes, I do [think animal welfare is important] now, but when I buy it I don’t really think about it.

Group 5, North West (urban), ‘Never buy higher welfare foods’

With regard to the apparent ‘value-action’ gap, the literature suggests that price, availability, and lack of information about the welfare characteristics of products are among the most important explanations of the proposed gap between values and purchasing behaviours (e.g. Duffy and Fearne, 2009; Civic Consulting, 2009; EC, 2007; McEachern et al, 2007; Kjaernes et al, 2007; Mintel, 2006; Harper and Makatouni, 2002).

During the first round of focus groups, participants were asked to identify reasons why people like them might not buy higher welfare foods, and they were then invited to rank
these barriers in terms of their importance. Analysis of this ranking exercise provides a picture similar to that in the literature:

Figure 5 – Participants’ ranking of barriers to purchasing higher animal welfare products (n = 40)

Barriers rated on a scale of 1-5, where 5 was ‘most important’.

As Figure 5 shows, price was considered to be the main barrier to buying higher animal welfare products by focus group participants. However, a central aim of this work was to go beyond the well-known price barrier and to explore the foundation of the dominance of price in decision making around higher welfare products – what can help us to explain the widespread unwillingness to act on reported values and pay extra for higher animal welfare standards?

Purchasing decisions involve consumers striking complex balances between price, on one hand, and, on the other, factors such as perceived quality and value, plus the overall costs (for example, in terms of time) of decision making (e.g. Brug et al, 2006; McEachern and Warnaby, 2008). Before we can explore the ‘external’ barriers that prevent a consumer making decisions according to their values, it is necessary to establish why those values, which are reported so universally, seem to be absent from the purchasing context and generally do not feature in consumers’ ‘value for money’ equations.

9 ‘Knowledge’, in this case, relates to a consumer’s own sense of the degree to which they understand the issues involved, and how to identify or otherwise higher animal welfare products. In contrast, ‘information’ relates to the information provided about animal welfare products by producers and retailers. Thus, ‘knowledge’ may be used to process or identify relevant ‘information’, and information can contribute to knowledge, but the two are conceptually distinct.
The sections below explore the key barriers that, for many people, mean that additional monetary cost outweighs the value provided by higher welfare attributes.

External and internal barriers
Barriers to purchase can be roughly grouped into ‘external’ barriers – for example, availability - that are mostly out of the control of the consumer, and ‘internal’ barriers – those social-psychological factors such as lack of awareness and trust that are attributes of the consumer, rather than the product.

Price: external and internal barrier
The higher price of many higher animal welfare products is genuinely prohibitive for some people, particularly those on low incomes, who wish to buy higher welfare products.

F: I think for the people that are on a low budget, I am not saying that I am on a majorly low budget, for the people that are on a majorly low budget, that is narrowing their options.

Group 1, London, Positive Greens

For many participants, however, the possibility exists that price may be more of a psychological barrier than a physical one – as suggested in the literature, unwillingness to pay rather than ability to pay may be the more important issue. The ‘internal’ barriers set out below may help explain low willingness to pay for higher animal welfare, and the gap between reported attitudes and actual behaviours.

Engagement at the point of purchase
The literature suggests that consumers’ food-related values are often in competition or even conflict with each other and with wider, contextual or circumstantial factors, and attitudes to specific issues can be modified or even cancelled out by competing issues (Schroder and McEachern, 2004). This competition with other issues – including other values-based issues as well as product-specific (e.g. which brand and pack size) and contextual issues (e.g. what do I need to buy, for what purpose, how much time do I have and where am I shopping?) – is often a factor in reducing or precluding engagement with the issue of animal welfare at the point of purchase.

M: I don’t tend to think if I’m buying a product off the shelf. I don’t think to myself ‘how well was this cow treated or the pig treated’ or whatever it is. I think you’d get too caught up with that and I think there’s too many other considerations to be thought of at the same time.

Group 2, South West (rural), Positive Greens and Concerned Consumers

Purchasing decisions include, as well as a balancing of price and other product attributes, an evaluation of the costs of making that decision – for example, the opportunity costs of spending time in the supermarket, information search costs, and so on. The perception that engagement with the issue of animal welfare would require a time investment was a reported barrier to engagement for many participants.
Most people are in such a hurry when they’re doing the shopping. You aren’t dawdling around the supermarket are you?

Group 5, North West (urban), ‘Never buy higher welfare foods’

In order to balance these varied and competing considerations, and to avoid having to make new decisions every shopping trip, consumers rely heavily on past experience: habit is a key driver of purchasing outcomes (e.g. Aarts et al, 1998; Honkanen et al, 2006; McEachern and Schroder, 2004; Andresen, 2002). Habitual purchases are a type of ‘low involvement’ behavioural process, which represents a further barrier to engagement with the issue of animal welfare.

Habit. It’s just a case you pick up what you always –

Yes, what you’ve always eaten.

Group 4, North West (urban), Positive Greens and Concerned Consumers

As these quotes demonstrate, most participants were willing to freely admit that, although animal welfare was, in principle, important to them, it was unlikely to be at the forefront of their minds when shopping. The exercises and in-depth discussions during the focus groups revealed yet another ‘layer’ of underlying factors that help to explain this lack of engagement with animal welfare at the point of purchase.

Wilful ignorance
An attitude of ‘I’d rather not think about it’ was widespread among participants, and is also reported in the literature as a common element of consumers’ attitudes towards buying animal products – particularly meat – and to animal welfare (e.g. Ipsos Mori, 2010; IGD, 2007; Ngapo et al, 2003; Te Velde et al, 2002).

Ultimately they are all going to meet you know, their maker in the abattoir sadly, and I try not to think about that.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

As the quote above demonstrates, deliberately avoiding thinking about the issue is often a strategy to deal with values conflicts, guilt or discomfort at the thought of killing and eating animals. One version of this neutralisation of conflict was the frequent disassociation of food products and the animals from which they came (see also Schroder and McEachern, 2004; Harper and Henson, 2001; IGD, 2007).

When you see an investigation on the TV of chickens, you know, saying it’s overcrowded and that, you think ‘Oh, it’s a big, big angst about it’. But when you go in and see the portions in a supermarket, you know, to come in your shopping basket, you don’t really associate with them.

No.

Separate things completely, aren’t they.

Group 5, North West (urban), ‘Never buy higher welfare foods’ (Manchester
These neutralisation strategies are well known as a powerful driver of attitudes and behaviours (Festinger, 1957; e.g. Thøgersen, 2004), and they have important implications for the question of whether there is untapped demand for higher animal welfare products: a strong desire at both the conscious and sub-conscious levels to disassociate food and food choices from animals and animal welfare is clearly an important barrier to engagement with the issue of animal welfare, at the point of purchase and more generally.

The question of responsibility

The transfer of responsibility for the welfare of animals to other authorities – particularly the government and retailers – was also a commonly reported reason why people did not buy higher welfare products, despite their concern for the issue (see also Borgen et al, 2004; Blandford et al, 2002; Mayfield et al, 2008; RSPCA, 2006).

Among focus group participants, the transfer of responsibility was often expressed as the view that consumers need not worry since there is legislation in place to ensure minimum standards, and many participants expressed an implicit trust in those standards.

F: If they put stuff on the shelves, like factory eggs and stuff like that, I kind of think it can’t be that bad or it wouldn’t be legal for them to do it.

Group 10, East Anglia (rural), ‘Always buy higher welfare foods’

The literature provides a mixed picture on the subject of views on legislative standards: for example, the 2007 Eurobarometer reported that 25% of UK respondents thought that improvements in animal welfare standards were definitely needed, and 42% thought they were probably needed; while another UK survey carried out in 2003 (Duffy and Fearne, 2009) found that 75% of respondents were extremely (10%) or quite (65%) confident in animal welfare standards.

Such contrasting results (two thirds thought standards needed to be improved vs three quarters had confidence in standards) may be indicative of conflicting or contradictory views being held by participants themselves (Schroder and McEachern, 2004). This was demonstrated during the focus groups, with some participants transferring responsibility as a means of reassuring themselves there was nothing to feel guilty about (as in the quotation above), while simultaneously assuaging any guilt they did feel by blaming ‘the system’ for any perceived poor welfare outcomes.

Collective action problem

Related to the transfer of responsibility to higher authorities, a view was often expressed by participants that their action alone would not do anything to change the overall outcome.

M: For one person to stop and decide they are going to go free range or organic makes no difference whatsoever.
F: It doesn’t make any difference does it, no.

Group 5, North West (urban), ‘Never buy higher welfare foods’

This ‘fatalistic’ attitude (Harper and Henson, 2001) has been found in other work (e.g. Schroder and McEachern, 2004; Harper and Makatouni, 2002) and is another well-known psychological strategy for denying responsibility and neutralising guilt. It is interesting to
note that across the EU, three quarters of respondents thought that their purchasing decisions would not influence welfare standards (EC, 2007). However, another survey found that, among those who could identify higher welfare products on the shelves, 85% believed that they could make a difference (RSPCA, 2006), which suggests a possible correlation between knowledge of (or perhaps engagement with) welfare standards, and believing that individual actions make a difference.

**Functional view of farm animals**

Some participants expressed a ‘functional’ view of farm animals – that they are bred for the purpose of being killed and eaten.

M: *I mean killing them is not the right thing to do really is it, but still.*
W: *But then that is what they are for isn’t it.*
M: *Yes, yes they are bred for that aren’t they.*
W: *They are bred for that aren’t they, really.*

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

In addition to this, some participants associated ‘animal welfare’ with other animals – pets, zoo and circus animals, and so on – but not with farm animals. This ‘functional’ view, in conjunction with wilful ignorance and transfer of responsibility, may be part of the reason why generalised reported concern about animal welfare does not transfer to farm animals, and is another barrier to engagement with animal welfare in the context of food products.

M: *When I think of animal rights I think of tigers and I think of bears and I think of lions and cheetahs and monkeys and gorillas you know. I don’t think of domesticated animals in the same way.*

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

**Absence of social norms**

Again echoing the literature, many focus group participants indicated that they would be likely to pay more for higher animal welfare products for special occasions (such as a dinner party or Christmas) (McEachern and Schroder, 2004). However, as found earlier in our research and in other studies (e.g. Schroder and McEachern, 2004), this was driven primarily by the desire to buy a better quality, tastier product, rather than for moral reasons around animal welfare.

F: *“If I was having people round, a free range one. Just fresh. Yes, because the flavour’s better”.*

Group 2, South West (rural), Positive Greens and Concerned Consumers

McEachern and Schroder (2004) found that having guests or special occasions introduced normative influences, which were not found on a day to day level. The authors suggest that social relationships and values are an important part or our attitudes towards food, and it is possible that people are particularly sensitive to social, reputational and even status effects (Bateson et al, 2006) of the food they give to others. Amongst some focus group participants, there was a certain stigma attached to buying the cheapest food products:
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F: If I was at the queue in Tesco’s and I have got all my basic stuff going through and some really gorgeous man was putting his on the end I would be like, “Oh God” – a bit ashamed sort of thing if you have got all your value stuff.

Group 10, East Anglia (rural), ‘Always buy higher welfare foods’

However, there was little evidence of a social imperative to buy higher animal welfare products. Social norms (both descriptive – what does everybody else do? - and injunctive – what do I feel I should do?) are strong behavioural motivators, but the evidence in the literature and focus groups suggest that neither descriptive nor injunctive norms are in operation with regard to purchasing higher animal welfare products.

In relation to this, Mintel (2006) draws a parallel between purchasing free range eggs and recycling: both are relatively common behaviours, yet neither is necessarily indicative of ethical engagement with the wider issue – environmental concern in the case of recycling; animal welfare in the case of purchasing free range eggs. Many people may participate in both of these behaviours thanks to a widespread descriptive norm (‘everybody does it’), but do not perceive the behaviours (or themselves) as pro-environmental or pro-higher welfare. In other words, purchasing free range eggs (and recycling) cannot be taken as a necessary indicator of an interest in animal welfare (or the environment) or an intention to purchase higher welfare products. In some cases, far from being ‘entry’ points to further action, these behaviours may even provide an ‘alibi’ against further action, by providing a front of ‘doing one’s bit’ and therefore negating the need to do more (Thogersen, 1999).

Summary: internal barriers
The section above has set out a number of internal, psychological barriers to purchasing higher animal welfare products, principally wilful ignorance about welfare issues and active disassociation of food and animals; transfer of responsibility to others and a denial of personal responsibility; a functional view of farm animals; and an absence of social pressures affecting attitudes towards animal welfare in all but a few circumstances.

These underlying factors represent the most fundamental layer of barriers to purchase: they are barriers to engagement (and in some cases, active motivations for disengagement) with the issue of animal welfare in the context of food and food purchasing. Since engagement with the issue is a necessary prior condition for it to be incorporated into decision making, the existence of these often deep seated psychological barriers are perhaps the key to understanding the gulf between the reported importance of an abstract notion of animal welfare on one hand, and actual purchasing behaviour on the other.

External barriers: availability
The key external barrier – availability – did emerge among some focus group participants as a barrier to purchasing higher welfare products, both in terms of simply whether higher welfare products were available, and in terms of the choice of products within higher welfare ranges.

M: You go into Asda, for instance, you have a whole cabinet devoted to Smart Price, and then half a shelf devoted to...
animal welfare products. If you go to the small Sainsbury's locals, or the Tesco's or whatever, they haven't got any at all.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

F: If you get the Free Range one sometimes you won't get the size chicken you want because there is not a big selection there.

Group 1, London, Positive Greens

Although availability of higher welfare products was reported as a problem by some participants, in-depth discussions were dominated by other factors – principally internal barriers that were symptomatic of general disengagement with the issue of animal welfare.

Informational barriers

A lack of information, or being confused about, or distrusting of, information was offered by many participants as an explanation of why they did not buy higher welfare products. Insufficient or low quality information also comes up frequently in the literature as a barrier to purchase (e.g. Civic Consulting, 2009; Duffy and Fearne, 2009; Harper and Makatouni, 2002). However, in the light of the discussion above about the fundamental psychological barriers to engagement with the issue, the problem of low recall, recognition, understanding and trust in labels may be better conceptualised as a symptom of deeper disengagement with animal welfare, rather than a genuine cause of inaction.

The finding that many people prefer to avoid thinking about animals and animal welfare in the context of their food, and the fact that animal welfare is not a primary consideration in decision making, means that most people are unlikely to look out for, or be primed to notice, information about animal welfare. In addition, claimed mistrust of labels may be for some people another means of denying personal responsibility or assuaging guilt. The following section explores some of these informational issues in more detail.

Low recall of labels

Unprompted recall of existing higher welfare labelling schemes was low. Many participants could not remember ever having seen welfare labels; others had a vague recollection of seeing such labels, but found it difficult to remember the details. The picture is the same in the literature: one survey found that just 14% of respondents could recall seeing values-based labels on meat (McEachern and Schroder, 2004).

F: I have seen something blue on food and I can’t think what it is.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

M: I think there is a supermarket that has a logo for local produce but I can’t remember which one.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’
The best recognised label associated with welfare standards was the Red Tractor logo, which was almost universally recognised in rural groups, although recognition was lower among urban groups (see FSA, 2010; Duffy and Fearne, 2009; and Schroder et al, 2004 for similar findings).

Surveys suggest that there is widespread reported dissatisfaction with the availability and accessibility of information on welfare. The 2007 Special Eurobarometer on animal welfare reported that two thirds of respondents ‘certainly’ or ‘probably’ disagreed that “current labels of food products allow you to identify those products sourced from higher animal welfare production systems”. In another survey, respondents were asked whether, when shopping for meat, eggs or milk, they can easily identify products sourced from animal welfare-friendly production systems from their labelling, and over half said that they could never or rarely do this (EC, 2007).

However, in-depth discussion with focus group participants suggested that dissatisfaction with labelling was rarely a barrier at the point of purchase, since, as we have seen, most people tended not to think about animals and welfare standards when making their shopping decisions. This raises the possibility of a self-perpetuating cycle of disengagement: since consumers are not ‘primed’ to the issue of welfare, they do not notice labels; and since they do not notice labels, they are not reminded about welfare at the point of purchase. In any case, the overall picture given by the literature and the focus group participants is that existing welfare labelling schemes are currently not succeeding in communicating effectively with a majority of consumers.

Lack of trust in labels

A lack of trust in labels emerges as an important theme in the literature (e.g. Nilsson et al, 2004; Aarset et al, 2004; Harper and Makatouni, 2002; Ngapo et al, 2003; Schroder and McEachern, 2004). Focus group participants also raised concerns about the accuracy and honesty of welfare labels (and often labelling in general), and many felt mistrustful not only of the information itself, but of the organisations behind the information (for example, producers and retailers).

M: I have seen programmes and read articles of things about you know an animal living outside for a certain number of days making it organic. So you can have them living in a shed or whatever and then put them out to pasture or whatever.

F: They do lie, don’t they.

M: And you think well I am paying three extra quid for this thing that...

F: I watched a programme on supermarkets and they are really clever the way that they do it, they just trick you.

Group 1, London, Positive Greens

As this exchange demonstrates, a lack of trust often went hand in hand with confusion about what different labels mean – understanding of labels was often limited. Low levels of understanding are also found in the literature – for example, one study found that just 9% of their sample of respondents reported feeling confident that they understood the Freedom Food label (McEachern et al, 2007), and many surveys report widespread confusion about
labels on animal products (e.g. Jacquet et al, 2009; Duffy and Fearne, 2009; Aarset et al, 2004; Ngapo et al, 2003).

Lack of trust in supermarket schemes
Participants often held contradictory views about supermarkets – despite the majority being loyal customers of the major retailers, they also often expressed distrust in the motivations of supermarkets with regard to values-based issues such as animal welfare.

M: All the main supermarkets’ focus is actually driving the costs down for them and more profits rather than animal welfare.

Group 3, East Anglia (rural), Concerned Consumers

This view differs in some respects from findings in other studies; for example, one survey found that 83% of respondents expected retailers to ensure higher welfare standards for chicken (RSPCA, 2006), and another study found that supermarkets and supermarket branding are used as a cue by consumers that enables them to trust that standards are being met (Frewer et al, 2005). This variation in response depending on the context and the question asked suggests that many people’s views on this subject are not stable, and that the transfer of responsibility to supermarkets, both in a negative sense (‘it’s their fault’) and in a positive sense (‘they make sure it’s ok’) is common. This again underscores the desire of many consumers to avoid thinking about or taking responsibility for standards of animal welfare.

Confusion and information overload
There was a widespread feeling among participants that they were at saturation point when it came to absorbing information from food packaging (see also FSA, 2010; McEachern and Warnaby, 2008; EC, 2007; Harper and Henson, 2001). As such, the cost of acquiring suitable and sufficient information is high, and demand for further information is limited (McEachern and Warnaby, 2008).

M: We’re just getting inundated with labels...nobody takes a blind bit of notice of all that.

Group 2, South West (rural), Positive Greens and Concerned Consumers

This ‘information overload’ (Harper and Henson, 2001) is not specific to the issue of animal welfare, but does have implications for welfare labelling: competition for consumer attention is high, and the capacity and willingness of many consumers to engage with more on-pack information is low.

Knowledge and understanding
Knowledge and understanding of animal production systems and welfare standards varied among participants, with rural groups often appearing to be more knowledgeable about food and farming (see section 2.4 below). The focus group discussions explored how participants understood animal welfare, and the kinds of ideas, language and images that constituted this understanding.

The most common aspect of production systems and animal welfare mentioned by participants was animals’ living conditions. Participants associated animal welfare principally
with animals having ‘enough’ space and freedom to roam. This highlights again the tacit links consumers make between production systems and welfare standards, with extensive systems assumed to imply higher welfare.

**M:** ...some places aren’t are they, they are initially let in to this tiny little field where they probably haven’t got enough room to turn around. I think room, the amount of space they have.

**W:** Yes, space and freedom.

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Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

**F:** All animals should be allowed to go outside and enjoy the fresh air, not all in these barns and rows and rows... It’s not natural is it? And we’re eating that.

---

Group 2, South West (rural), Positive Greens and Concerned Consumers

On further prompting, some participants did mention other aspects of production systems, such as live transport and slaughter, but discussions were dominated by how animals were kept on farm. This pattern is echoed in the literature: for example, 64% of UK respondents to one survey stated that their main welfare-related concern was that animals had sufficient space in which to move around (RSPCA, 2006); another found that 37% stated as their main concern living conditions, 29% said hygiene on farms, and 28% said feed (IGD, 2007).

Having space and outdoor access seemed to be part of a general desire for animals to be kept in ‘natural’ conditions. This extended to how animals are fed and medicated, which was often expressed as an aversion to ‘tampering’ with animals and animal products.

**F:** They are eating fresh grass and fresh food.

**M:** Not sort of crammed with growth hormones and stuff like that.

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Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

**F:** If you want a chicken to taste like a chicken it has [to] come from natural surroundings, it is not a battery chicken. That is the worst thing that can happen.

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Group 5, North West (urban), ‘Never buy higher welfare foods’

These discussions served to underline the inextricable connection made by consumers between production systems, standards of welfare and the quality of the final product – in the example above, the primary benefit of ‘natural’ conditions for chickens seems to be the taste of the meat.

The literature suggests that different aspects of production and welfare are important to consumers across different products, with one survey finding that transport was the key concern in relation to cows and sheep; housing and health the key concern in relation to
pigs; and health the key concern when it came to chickens (McEachern et al, 2007). This differentiation across different types of animals was echoed by some participants:

**M:** A cow goes in a field and sits in a field and does whatever, but a chicken can be a battery, which obviously isn’t as nice as a free range, but cows are not like that generally and sheep are not like that. So to me, if I was going to buy beef, beef is beef at the end of the day. A chicken? Yes you can make a choice on that. Pork, as I mentioned earlier, pork you can make a choice on.

Group 4, North West (urban), Positive Greens and Concerned Consumers

The concern about battery chickens expressed by this participant reflects a wider trend. Chicken tended to be at the forefront of people’s minds during discussions about meat buying – probably because chicken is the most popular meat purchase, and because several celebrity chef campaigns have focused on poultry farming. The influence of media on participants’ understanding of and attitudes towards farming and animal welfare was clear, and participants themselves reported that their knowledge of these issues came almost exclusively from television. It was striking that, when asked what images sprang to mind when we talked about animal welfare, the dominant answers were negative images:

**Q:** When we say animal welfare ... what sort of things pop in to your head?

**W:** Battery chickens.

**Q:** Battery chickens?...

**W:** Jamie Oliver did that programme not long ago.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

**F:** I think everyone eats the food but when they see the shocking programmes because no-one is aware of what actually happens unless the programme is on TV; and I think when you see the TV programme of the chickens and how they treat them it makes you think a little bit more about the food.

Group 1, London, Positive Greens

The idea of ‘happy’ animals arose frequently in the focus groups. The desire to think of farm animals as ‘happy’ was widespread, and was a much more commonly expressed desire than for animals to be, say, slaughtered or transported humanely. In other words, most participants chose to engage with the issue of animal welfare on an emotional (‘happy animals’) basis, rather than a more rational basis involving detailed understanding.

Engagement with the issue of animal welfare on a more reasoned basis often induced feelings of distaste, discomfort or guilt. For this reason, despite claiming, when asked, to want more information about animal welfare, many participants actively rejected increased understanding and knowledge in favour of cues that allowed them to trust, on an emotional (‘happy animals’) basis, that a product was quality/healthy/tasty plus ethical/happy/feel-good, without going into the details. In the case of animal welfare, there is therefore an
apparent contradiction between, on the one hand, consumers’ desire for a ‘connection’ to their food and trust in the supply chain; and on the other hand, a rejection of the knowledge and understanding that might provide a basis for this trust.

**Availability of labels**
A final point relating to information barriers is the availability of animal welfare information in different contexts. Both the literature and our focus group participants highlighted the absence of labelling or information for different types of products and in different contexts. The main issues were pre-prepared food (for example, hot chicken from the supermarket rotisserie) and food in restaurants and cafes (Schroder and McEachern, 2004).

*F: I buy chicken that is already cooked so I can’t tell whether it is free range or not because it is not labelled, it doesn’t say free range or whatever, it is just taken from the oven or the grill.*

*Group 1, London, Positive Greens*

*M: When you are eating out and things, you don’t know in a restaurant how well the food is kept.*

*Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’*

Although an absence of labels in certain contexts was not reported as a highly important barrier, this does highlight a genuine gap and a potential marketing opportunity. It also reflects consumer demand for labels in general to be consistent and simple across products and contexts, in order for decisions to be made as easily as possible.

**Summary – informational barriers**
In summary, the evidence from the literature and the focus groups demonstrates that understanding of farming and welfare is relatively low among most consumers, who feel at once overloaded with information on packaging (Harper and Henson, 2001; FSA, 2010) and lacking in information about production systems and welfare. There is widespread disengagement with existing welfare labelling schemes, and the outcome of engagement with them often seems to be confusion and mistrust. This suggests, therefore, that there is a need to improve the ways in which information about animal welfare is communicated to consumers.

The issue of trust is fundamental in any discussion of informational barriers. Lack of trust in information is cited in the literature and by focus group participants as a problem. However, mistrust of labels and information about welfare may be a symptom of a wider feeling of disconnection from where food comes from – note, for example, that local food seems to induce greater confidence in ‘standards’ among consumers. This implies that information about welfare may be most effective as part of wider information about origin, production method and so on.

Improving information provision and communications around welfare is unlikely, on its own, to break down the deep-seated psychological barriers to engagement with animal welfare that are present in many consumers. However, the evidence suggests that there is a (albeit complex) positive correlation between higher levels of understanding and purchasing higher
welfare products. Improving information about welfare standards may, for some segments of the population – principally those with an existing level of engagement - be one factor in improving knowledge and understanding and causing a shift in motivations. This may, in the absence of other barriers, translate into more purchases of higher welfare products.

Summary – what are the key barriers to buying higher animal welfare products?
There are a number of barriers to purchasing higher welfare products, that have been grouped, for ease of reference, into three main types: external barriers (such as insufficient availability of higher welfare products), internal barriers (such as wilful ignorance about farming, animals and welfare) and informational barriers (such as a lack of information about welfare being available to consumers in a way that enables them to engage with the issue). These three main types of barriers overlap with one another, and are all part of the explanation of the gap between attitudes to animal welfare in principle, and purchasing decisions in practice.

This analysis, based on evidence from the literature and our own primary research, suggests that the key barriers to purchasing higher welfare products are mostly internal, psychological barriers. These psychological barriers mean that consumers are unlikely to engage with the issue of animal welfare, which precludes consideration of the issue in purchasing decisions.

External and informational barriers are likely, therefore, to be more of an issue for those consumers who are engaged with animal welfare and are interested in incorporating consideration of the issue into their decision making. The evidence suggests, however, that for a majority of consumers, tackling internal barriers would be a necessary prior condition before removal of external barriers would make a difference to behaviour.

2.4 Differences between consumer segments
Previous work has suggested that socio-economic group, age and gender all seem to influence the likelihood of a given individual taking animal husbandry issues (including welfare) into account when buying animal products. Surveys have also found regional differences in purchasing patterns.

Socio-economic group
One study found that 55% of respondents from the AB socio-economic group said they bought free range products whenever they could, compared to 43% of C1s and 33-35% of C2DEs. A similar pattern was found for organic purchases, with 26% of ABs saying they bought organic products whenever they could, compared to 6% of DEs. The same study showed that choice of retailer was also a predictor of claimed propensity to buy higher animal welfare products – for example, 43% of Waitrose shoppers reported buying organic whenever they could, compared to 19% of Asda shoppers – which is likely to be a partly a reflection of socio-economic group (Mintel, 2009).

Mintel (2006) reported that consumers in the ABC1 socio-economic groups were more likely to claim to be concerned about ethical issues and to have the means to purchase ethical products on a regular basis. Similarly, Harper and Henson (2001) demonstrated a link
between level of education, socio-economic group and claimed willingness to pay for higher welfare products. IGD (2007) found that those from the DE groups were least likely to buy higher welfare products; however, they also found that those who claim to always buy higher welfare goods are spread evenly over the socio-economic groups.

Age
Several studies have found that older people are more likely to take animal husbandry into account when buying food – for example, Mintel (2009) found that 52% of those over 65 said they bought free range whenever they could compared to 31% of 15-24 year olds. Similarly, IGD (2007) found young people the least likely to buy higher welfare products, and those of middle age most likely. Older people are also more likely to associate intensive farming methods with lower welfare standards and worse product quality (Harper and Henson, 2001).

Gender
Women are found to be more likely to be concerned about animal welfare than men (Harper and Henson, 2001; Kjaernes et al, 2007; Mintel, 2009); for example, one study found that 47% of women claimed to buy free range products whenever they could, compared to 38% of men (Mintel, 2009).

Regional differences
A number of studies demonstrate regional differences in likelihood of purchasing different types of animal product (Mintel, 2009; McEachern et al, 2007; McEachern and Warnaby, 2008; IGD, 2007). For example, Mintel (2009) found the a north-south divide, with 46% of respondents in the South West claiming to buy free range products whenever possible, compared to 37% in the North. London residents were most likely to buy organic products, and the Welsh were more likely to claim to buy products from their own country whenever they could (55% of Welsh respondents, compared to, for example, 39% in London). Another study found that rural residents were more likely to buy Freedom Food products, and urban residents were more likely to buy organic food (McEachern et al, 2007).

Summary
The evidence shows that there are a number of socio-demographic trends associated with buying higher animal welfare products, and more generally with taking animal husbandry issues (such as production system) into account when purchasing. One of the principal underlying characteristics seems to be socio-economic background, which might, on the surface, suggest that purchasing higher welfare products is a function of having the means to do so – in other words, ability to pay could be construed on this basis as an important driver, and as such, price an important barrier.

However, as outlined in the previous sections of this report, the aim of this research was to go beyond the barrier of price and investigate the social-psychological factors at the basis of willingness to pay for higher animal welfare products. As such, the recruitment criteria for focus group participants was designed to enable an exploration of differences between different groups of consumers with regard to attitudes, beliefs, values and behaviours around animal welfare. Annex 3 contains full details of the recruitment criteria and participant profiles – the main points are summarised below.
Differences between groups: Defra segments

Four out of the ten focus groups that comprised the main body of this research were recruited on the basis of Defra’s segmentation model, which is derived from a nationally representative survey on Public attitudes and behaviours towards the environment (2007). The aim of these groups was to explore the possibility of links between pro-environmental attitudes and behaviours, and pro-animal welfare attitudes and behaviours.

Defra’s original 2007 survey included questions about purchasing products carrying labels including Red Tractor, Freedom Food, Organic and Free range. The results indicate that there are differences between the Defra segments based on their self-reported purchasing behaviours.

Figure 6 – Selected results derived from Defra (2007) Public attitudes and behaviours towards the environment (n=3,618). “Which of these do you make a conscious effort to buy?”

These results show a pattern of Positive Greens reporting higher levels of purchases across the product types, except Red Tractor, which Waste Watchers are most likely to buy. The data reveal an overall trend (although there are some exceptions) of fewer purchases among the segments with less environmentally friendly attitudes and behaviours, with the exception of the Honestly Disengaged segment.

Although the chart shows that those who are more likely to hold pro-environmental attitudes and behaviours are also generally more likely to report buying higher animal welfare products, it does not prove that there is any significant relationship between
environmental attitudes and behaviours on the one hand and animal welfare attitudes and behaviours on the other. There may be various explanations of the correlation; for example, other factors may be at least as (if not more) important as ‘greenness’ in determining animal welfare purchasing habits; a prime candidate could be socio-economic background. Indeed, it is possible that these other factors are entirely responsible for purchase of higher welfare products, and that ‘greenness’ is not an explanatory factor at all.

However, whatever the underlying explanation, analysis of the survey results showed that the most environmentally friendly segments are most likely to report making a conscious effort to purchase higher animal welfare products: This provided a rationale for recruitment on these grounds for the first round of groups, and the opportunity to explore, in a qualitative manner, the links and associations between pro-environmental attitudes and behaviours, and pro-animal welfare attitudes and behaviours.

The principal aim of the first round of focus groups was to characterise the sets of values, beliefs and attitudes of those who already buy some higher welfare products, and to investigate links to other issues, particularly environmental issues. The groups were constituted as follows (full profiles, including socio-demographic characteristics, are shown in annex 8):

<table>
<thead>
<tr>
<th>Defra segment</th>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
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<tbody>
<tr>
<td>Positive Greens</td>
<td>Group 1</td>
<td>Positive Greens and</td>
<td>Positive Greens and</td>
<td>Concerned Consumers</td>
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**Propensity to buy higher animal welfare products**

The second round of focus groups was recruited on the basis of reported attitudes and behaviours towards buying higher animal welfare products.

<table>
<thead>
<tr>
<th>Propensity to buy higher welfare products</th>
<th>Group 5</th>
<th>Group 6</th>
<th>Group 7</th>
<th>Group 8</th>
<th>Group 9</th>
<th>Group 10</th>
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<td>‘Never’</td>
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Loose quotas were set for socio-demographic characteristics (age, gender and socio-economic group) in order to ensure that a range of different types of people were represented, but the precise final configuration of these characteristics was determined by participants’ propensity to buy higher welfare products (see annex 8 for participant profiles). Each second round participant was also profiled in terms of which Defra segment they belonged to (this was conducted at the end of focus groups and was not a recruitment criterion).

As set out in section 3, both rounds of focus groups were held in a mixture of rural and urban locations, since this emerged in the literature as an important explanatory factor in attitudes and behaviours.
A variety of social research techniques were used across both rounds of groups to explore the basis of different patterns of attitudes and behaviours. By characterising the different sets of values, attitudes, beliefs and so on associated with different behavioural patterns, the aim was to understand the drivers of these outcome behaviours and thereby provide a basis for targeted and refined policy and communications.

Links between environmental attitudes and behaviours and animal welfare attitudes and behaviours

As discussed above, analysis of Defra’s survey data suggests some correlation between environmental and welfare attitudes and behaviours (see Figure 6). The results of the recruitment for the second round of focus groups provide a mixed picture on this overlap. The second round of groups was recruited on the basis of reported propensity to buy higher welfare food. Each participant also completed a segmentation questionnaire at the end of their group, allowing us to see which segment participants in each group belonged to. Figure 7 shows the differences in segmentation coverage in the second round groups, split between those who reported buying higher animal welfare products always/usually/often, and those who reported never/sometimes buying higher welfare products.

These charts are based on very small samples (each chart represents approximately 30 participants), so any inference from them must be taken with extreme caution. However, it is interesting to note that, at the ‘always’ end of the propensity to buy higher welfare products spectrum, these results do roughly correspond to the analysis of Defra’s survey results, with the largest section of the group comprising Positive Greens and Concerned Consumers.
Consumers. However, there is no clear pattern at the other end of the spectrum, which contains a range of various segments, including Positive Greens and Concerned Consumers, in roughly equal numbers. This suggests that, if there is an overlap between environmental and animal welfare attitudes and behaviours, it is not a simple or perfect link, and there are a range of different underlying factors driving propensity to buy higher welfare foods on one hand, and pro-environmental behaviours on the other.

Despite the tendency in the Defra 2007 survey for the greenest segments to claim a greater commitment to buying higher animal welfare products, evidence from the literature suggests that consumers do not draw strong links between environmental issues and animal welfare. For example, a special Eurobarometer on attitudes to animal welfare found that, when asked about their motivations for buying higher welfare products, just 17% of respondents put ‘better for the environment’ in their top three answers (EC, 2007). One study found a negative relationship between concern for the environment and purchases of meat products carrying values-based labels (McEachern and Schroder, 2004).

Our focus group participants gave the same impression – environmental issues were not spontaneously linked to animal welfare, and even when specifically prompted on the subject, most participants did not easily draw links. The results of the sorting exercise show that environmental issues and animal welfare issues were treated as conceptually very distinct matters by participants (see section 2.2, Figure 4 - patterns emerging from the sorting exercise - and annex 6).

All the evidence suggests that there is little, if any, association between specific environmental and welfare attitudes – for example, the sorting exercise showed that participants did not make any links between environmental product attributes such as ‘carbon footprint’ and animal welfare. This suggests that the correlations between environmental and welfare attitudes may be explained by other, latent drivers that are a common denominator for both types of behaviour.

The literatures on attitudes and behaviours towards the environment and towards animal welfare concur that certain broad types of values are associated with both environmental and welfare outcomes. ‘Universalism’, defined broadly as ‘outward looking’ and ‘bigger picture’ values such as social justice (Schwartz, 1994), emerges in the literatures on both subjects as having a strong association with both environment- and welfare-friendly attitudes and behaviours (see, for example, Dietz et al, 2005; Thøgersen and Olander, 2003 on environment; FSA, 2010 on welfare). Focus group participants also made links to broader ethical values that underpinned a range of purchasing decisions (for example, buying fair trade), which many perceived to be becoming more common:

F: I think most people are becoming more aware of things.
M: More socially conscious.
F: Yes, definitely....
F: I have to say in, with Fair Trade, which is a little different, there is a big input in secondary schools about Fair Trade and making young people aware of Fair Trade products. I think with more and more awareness going on and it is coming from younger ones and moving up.
F: Yes.
Q: And do you think that could happen with the animal welfare side of things?
F: Yes, I think it could, yes.

Group 9 (South West, rural), Usually/often buy higher welfare foods

Theories of behaviour postulate that there are various psychological factors that determine behaviour. These determinants of behaviour include things like values and ‘world view’, and often underpin various types of observable behaviour. One example of a theory of behaviour that may help shed light on the correlations between environmental and welfare behaviours is the theory of planned behaviour (Ajzen, 1991). This framework for understanding behaviour conceptualises the determinants of behaviour as:

- A person’s attitude towards the issue, including the strength of their beliefs;
- Social and personal (moral) norms, including the strength of the feeling that one should do something about an issue;
- Perceived personal efficacy, including both the belief that one has the ability to act, and that the action will result in the desired outcome.

Analysis of the values and norms associated with each Defra segment supports the view that similar types of values and norms are associated with both environmental and welfare behavioural outcomes. In particular, what may broadly be defined as ‘altruism’, plus a willingness to accept personal responsibility and believe in one’s power to make a difference in ‘collective action problems’; and a willingness to pay in accordance with that personal responsibility, seem to be key features of the basic moral mindset that both types of behaviour have in common. Table 5 below shows selected characteristics of these three key segments as illustrative examples of parallels in the literature and focus group evidence on animal welfare.

| Table 5 – Selected segment characteristics (from Defra, 2008) |
|---------------------------------|---------------------------------|---------------------------------|
| Positive Greens (18% of population) | Concerned Consumers (14% of the population) | Honestly Disengaged (18% of population) |
| Acceptance of personal responsibility | Acceptance of personal responsibility | Denial of personal responsibility |
| “They believe that humans are largely responsible for the environmental damage and it is up to individuals to adapt their behaviour to address this.” | “Members of this group are particularly sympathetic to the concept of ‘climate change’, acknowledging their personal impact and seeing taking action as important.” | “This group’s ecological worldview is predominantly shaped by a lack of interest and concern. They are nearly as likely as [Stalled Starters] to deny that their behaviour contributes to climate change and more likely than most to think the problem will be solved without people needing to make changes to their lifestyles.” |
| Willingness to pay for values-based attributes | Willingness to pay for values-based attributes | Unwillingness to pay for values-based attributes |
| “They are the least motivated by saving money (and by far the most willing to pay more for environmentally friendly products), keen to avoid waste, and the most likely to feel guilty about harming | “They are less likely than average to cite general barriers to pro-environmental behaviour, such as money-saving, inconvenience, and others not taking action.” | “They do not feel guilty about their environmental impacts and are unwilling to pay more for ethical or environmentally friendly products.” |
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<th>Personal moral norms</th>
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<td>“They are the least likely to cite generic barriers to being more environmentally friendly (whether effort, the difficulty of changing habits or the level of others’ action).”</td>
<td>“There is also some guilt about harming the environment and pro-environmental behaviours seem to fit with their self-identity. They may like to think that they are doing more than they are.”</td>
<td>“They are more likely to think it is not worth acting if others do not, though they are less likely to say they would do more if government did more. Notably they are the least likely to feel guilty about harming the environment.”</td>
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<td>“They are the most likely by far to be in AB socioeconomic groups (SEGs) and have the highest levels with household incomes of £40k and over per annum. They are the most likely to have a degree, and to read The Guardian, Independent or Times. Their profile is biased towards middle age (41-64), and owner-occupancy.”</td>
<td>“One third are aged 30-40, and there are the lowest levels aged 65 and over. There is a slight bias towards ABC1 SEG. One third have household incomes of £40k and above per annum and, notably, this includes the highest level of all groups with household incomes of £60k and above (nearly one fifth of the group). They are the second most likely to have a degree.”</td>
<td>“While the group spans all ages, under 30s are over-represented (comprising more than a quarter). In terms of social grade members of this group are slightly more C12DE SEGs, with ABs under-represented; income levels are also slightly below average. Similarly, slightly fewer than average of this group have degrees.”</td>
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The table shows that, as well as having some core values and personal norms in common, patterns in terms of the socio-demographic characteristics associated with attitudes and behaviours relating to both issues are also similar.

This evidence supports the suggestion that environmental and welfare behaviours may have some common denominators at the levels of values and personal moral norms, and that one manifestation of this commonality is propensity to (claim to) purchase products that are thought of as generally ‘ethical’.

It is important to note, however, that the overlap between environment and welfare issues is not straightforward. The details of exactly where and how this overlap takes place could feasibly be explored further within the framework of the segmentation model – for example, the Public attitudes and behaviours towards the environment tracker survey could be expanded to include more detailed questions on attitudes to animal welfare, which would also give more robust data on how these welfare attitudes and behaviours fit into the different segments. However, the wider evidence makes it clear that, beyond a certain set of common values, the environmental and welfare spheres are subject to a wide range of differing attitudinal and behavioural influences, and they should not be assumed to be the same in terms of policy and communications development.

**Differences between rural and urban residents**

Our focus groups supported the evidence in the literature relating to the importance of residential context to attitudes towards farming and eating animal products. Proximity to farming and personal experience of the processes involved in getting animal products to market seemed to result in rural residents being more engaged and knowledgeable about farming processes.

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The effects of this different perspective on farming on attitudes to animal welfare and purchases of higher welfare products was, however, unclear in both the literature and the focus group discussions. Although some studies have found rural residents to be more likely to buy higher welfare products (e.g. McEachern et al, 2007), work by the IGD (2007) suggests that those living close to food production may be desensitised to it, and hence less likely to buy higher welfare products. Some views of rural participants seemed to support this latter view:

F: My father in law was a poultry farmer but he was free range, he had free range chickens, and he took me one day to see the battery and it was awful, it was terrible...
F: I, my brother in law worked on a turkey farm and that was just horrendous.
Q: What about it?
F: Oh they are cramped together.
F: Cruel, oh.
M: False lighting... a chicken has got to see eight hours of daylight to lay an egg, well they just put in lights in the battery places.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

The results of the sorting exercise may help clarify this subject. There were marked differences between urban and rural groups in the links made between local food and welfare standards: local food and healthy/high welfare food were closely associated by rural participants, and a noticeable disconnection existed between these two categories among urbanites10 (see Figure 16 and Figure 17 in annex 6 for a visual representation of this). It is therefore possible that rural residents took ‘local’ as a proxy for ‘high welfare’, and assumed that if they were buying locally, they were guaranteed sufficiently high standards (in general, including welfare standards). Linked to this, the literature finds that rural residents are more likely to buy at small, independent outlets (IGD, 2007).

M: But again we shop [at the farm shop] because it is really good quality stuff. They have got a butchers, vegetables, cake, everything. But the kids love going there because of all the pigs while they are there. And then you go back to the butchers and a couple of times the kids have sort of like said, what is this.
Q: Yes.

10 This contrast in views explains the central position of the ‘local’/‘British’ category on the plot that includes both urban and rural views (figure 4 of the main report). The lack of consensus, with half of participants strongly associating ‘local’ with ‘the health/welfare’ category and the other half strongly disconnecting them, meant that the local category was plotted in the middle of the space.
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F: But they are in a nice area.
M: Exactly, yes all free roaming and stuff, do you know what I mean.
F: You know, they seem happy.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

The personal experience of rural residents and the link they made between local food and quality (including animal welfare) underlines again the importance of trust and a feeling of connection to where food comes from in attitudes towards food in general, and standards of welfare in particular.

M: The demise of the local butcher. Someone was saying earlier on that they didn’t even know there was a butcher, I think that is the trouble. It is a convenience thing, the local butcher, the local greengrocer, they are just not there or there are very very few of them.
Q: And do you think they made it easier to buy higher animal welfare?
F: You trusted them.
M: I think you trusted them more. Where I am from in Kent, it is a small village, and there is still a greengrocer and there still is a butcher’s and we have known them from years. We know exactly where the animals come from, we know which farm. And it is great. But I live in Kingston.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

The importance of trust and connection to food is perhaps summed up by a comment from one rural participant:

F: I think it’s a shame we have to rely on labels, really.

Group 3, East Anglia (rural), Concerned Consumers

In summary, it seems that proximity to farming led to a greater level of trust in standards (including welfare standards) and an assumption that locally produced food guaranteed high welfare standards.

Summary of differences between groups

The literature has shown that propensity to buy higher welfare products is linked to a range of socio-demographic characteristics, in particular socio-economic group. The evidence also suggests that there is some degree of common foundation between attitudes and behaviours towards the environment, and attitudes and behaviours towards animal welfare. The evidence suggests that the link is at the level of values and personal moral norms about these two issues, rather than at the level of specific attitudes and behaviours.

Some of these values and norms that seem to be associated with propensity to buy higher animal welfare products include altruism and universalism; a belief that the issue is of moral importance; a willingness to accept personal responsibility; a belief that individual action can
make a difference; and a willingness to pay in accordance with these values. As the above
discussion of barriers suggests, many of the psychological obstacles to animal welfare
becoming a primary driver of decision making – for example, a transfer of responsibility - are
the exact opposites of these values and norms.

However, it is important to note that, as the evidence in section 4.3 indicates, the internal,
external and informational barriers around purchasing higher welfare products are often
quite specific to the issue of animal welfare: although ‘environment’ and ‘animal welfare’
may have some basic moral values in common, attitudes and behaviours towards the two
issues are driven by a range of distinct factors at the level of individual motivations and
barriers, as well as wider contextual conditions.

One such contextual factor explored by this research with specific regard to animal welfare is
residential context, with rural residents found to be more engaged and knowledgeable
about farming. Paradoxically, there is evidence that, for some rural residents, this may result
in their being less likely to buy animal products carrying higher welfare labels, due to a tacit
assumption that buying local food (either local products or products from local shops)
guarantees higher welfare standards. Although this is by no means a proven pattern - and
there are likely to be some income and age effects on propensity to (claim to) shop at local
outlets - it is nonetheless an indication of the importance of trust and traceability in
consumers’ evaluations of quality.

**Identifying consumer segments**

To summarise, the evidence collected by this project has identified a number of antecedents
of behaviour – principally values and norms, plus socio-demographic and contextual
characteristics – that seem to influence propensity to purchase higher animal welfare
products. Some of the most fundamental of these factors overlap with Defra’s
environmental segmentation model - in particular the ‘ethical’ purchasing behaviour aspects
of the model. However, since many of the attitudinal and behavioural drivers around animal
welfare are particular to that issue (for example, suppressed discomfort at the thought of
killing and eating animals), the segmentation model would have to be built upon and
expanded in more detail around the specific issue of animal welfare in order for it to provide
a practical framework for policy and communications.

A complication with identifying distinct consumer segments based on attitudes and
behaviours in this area is the relatively low profile of the issue and low levels of actual
purchasing behaviours - Figure 6 shows that just 10% of the group most likely to buy higher
welfare products – the Positive Greens - claim to buy Freedom Food, and around half claim
to buy organic products and free range poultry. Animal welfare was not a salient issue for
the great majority of participants, and this made it difficult to distinguish between the
groups based on attitudes, levels of understanding and knowledge, beliefs, values and so on.
Even those groups recruited on the basis of ‘always’ or ‘never’ buying higher welfare
products contained people with a range of attitudes, suggesting that people exhibiting those
extreme behaviour patterns are rare, and most people are somewhere on the sliding scale
between the two. The relatively low variation in views and the apparent fluidity of attitudes
and behaviours in this area is linked to the issue’s low profile in consumers’ minds – the
stability of an attitude is associated with its salience or accessibility (Holland et al, 2003), and
due to the range of barriers discussed in section 4.3, the issue is rarely at the forefront of people’s minds.
3 Communicating with consumers about animal welfare

3.1 Communicating in general

Several implications for general communications about animal welfare may be drawn from the evidence presented in this report.

Communications that focus on animal welfare may not be ‘heard’ by the majority of consumers

Animal welfare is not a primary motivator of decision making for most people. For the majority of those people who do buy higher animal welfare products, the welfare of the animal is not the primary reason for purchase: ethical considerations around the welfare of animals are bound up with, and often secondary to, the tangible benefits to the consumer (perceived healthier, tastier, better quality food). This raises the question of whether communications should be centred on animal welfare per se as a lever, given it is not the ‘way in’ or hook for most people.

Related to this, animal welfare is rarely treated as a stand-alone issue. Rather, it is inextricably linked to a network of product attributes including quality, health, and taste. These tangible product attributes often are primary motivators of product choice, and may be more effective as the focus of communications that include consideration of animal welfare standards.

Engagement with food and the food industry may provide a suitable context for raising the profile of animal welfare

Evidence suggests that engagement with food and with the food industry in general is a strong predictor of intention to purchase higher animal welfare products (Frewer et al, 2005). This insight echoes the finding from the literature and our focus groups that participants often used ‘good’ or ‘trusted’ or ‘authentic’ (IGD, 2007) food as a catch-all idea for quality in all its senses, including animal welfare. This again suggests that treating animal welfare as part of a wider food and farming ‘story’ may be more effective than focusing on animal welfare in isolation.

It is important to note that the argument for treating animal welfare as part of a wider set of issues is subject to various counter-arguments. The principal one is that a failure to highlight welfare as an issue in its own right may compound the problems of a lack of awareness and ethical engagement, and preclude it becoming an embedded value (see e.g. Crompton and Thogersen, 2010).

From a practical point of view, however, treating animal welfare as a single issue is likely to result in poor outcomes: most consumers do not think along single issues lines, and their decisions are not driven by single issues, however motivated they are by that particular issue. In addition, a lack of concern for the welfare of animals does not necessarily prevent
people buying higher welfare products, if higher welfare is part of a package of other considerations that are important to them.

It is an important insight, however, that welfare should not be invisible within the wider food context. The argument here is that strengthening the associations between animal welfare and the wider issues that are already of primary importance to people may be an effective strategy to heighten the profile of the issue.

**Television is the most important medium of influence and information**

The focus groups suggested that television is a central source of information and influence for many consumers. Television is, as shown by recent celebrity chef campaigns, a particularly effective conveyor of negative information. Negative information tends to have a disproportionate effect on consumer understanding and attitudes (e.g. Leonard-Barton, 1985; Mittal et al, 1998), and people seem to recall more easily the negative or shocking images they are exposed to. However, television can also be used to create positive messages, and to influence behaviour in various ways, if messages are tailored to specific audiences and information is provided in ways that are accessible to those audiences.

**Rebound effects**

Communications with consumers must strike a delicate balance between providing information about animal welfare, while remaining sensitive to widespread distaste for particular types of detailed knowledge. The potential for negative or rebound effects from promoting or providing information on particular detailed aspects of animal welfare, in terms of putting people off buying certain products, is a risk for campaigns that seek to educate consumers (see de Boer et al, 2009; Frewer et al, 2005). Aarset et al (2004) highlight this contradiction: increased information about animal welfare has the potential to have negative attitudinal effects, and even negative sales effects for some people; however, a lack of information leaves consumer attitudes “at the mercy of the media.”

**Communications and publicity are needed at various points**

Information provision is not a silver bullet for encouraging increased purchases of higher welfare products, and the provision of information does not guarantee that people will take notice of or use that information. However, well-targeted messages that are accessible to consumers could have a role in beginning to break down some of the internal psychological barriers to engagement with the issue. For example, in the context of a labelling scheme, wider publicity of that label in various contexts could increase awareness and recognition of the label and therefore increase the likelihood of consumers noticing the label in store (although Jacquet et al (2005) present evidence that greater recognition of the MSC label for fish was not accompanied by increased purchases).

Our focus group participants made it clear that publicity about a label would be needed at various times in various contexts, including both in the home (when people may be more likely to have time to engage) and in store (when people do not want to engage in depth but need a reminder). Other ideas from participants for effective points of engagement for publicity purposes include on public transport and street billboards.
Communications that connect on an emotional rather than a rational level might be most effective

As the previous sections have shown, most consumers are resistant to engaging too deeply with the issue of animal welfare on a reasoned basis. Communications that tap into the emotional responses consumers have to animals, which is the level at which many choose to engage with animal welfare, may be an effective tool. However, although emotionally based constructs such as ‘happy animals’ may chime with the way in which consumers currently think about animal welfare, there may be similar arguments to those outlined above, in that effectively avoiding the issue may limit impacts over the longer term. In addition, a marketing strategy such as this that was not backed up by a clear definition or standard of what it represented might be perceived by many as meaningless or gimmicky, which could potentially have wider negative effects on trust in higher welfare labels.

3.2 The role of labelling

F: In a way, there are so many [labels] that, you know, who is actually going to go and look into precisely what each different, you know, company or whatever is actually doing and what their standards are; there are too many and no-one is going to do that.

Group 1, London, Positive Greens

McEachern and Warnaby (2008) state that the number of values-based labels, and in general the amount of information on packaging, mean that the cost to consumers of seeking out information is high. Feelings of ‘information overload’ relating to labelling in general were widespread among our focus group participants, who felt that ‘people like them’ have neither the time nor the inclination to ‘stand there and read it all.’

This issue is not specific to animal welfare. Engagement with food labelling in general is low: most purchases are low involvement, low attention activities, and consumers avoid detailed information by seeking simple cues (or ‘beacons’ – FSA, 2010) to tell them what they want to know. Most people remember very little about how they make purchasing decisions and how they use packaging information (Addie and Lewis-Hodgeson, 2010), and the process of making a purchasing decision is dominated by elimination of unsatisfactory or unwanted items, with the purchase decision or action often taking less effort than elimination decisions (Addie and Lewis-Hodgeson, 2010; see also de Boer et al, 2009).

More importantly, the literature suggests that labelling is unlikely to increase purchases among consumers who do not already hold the values that relate to the labelling (FSA, 2010; Jacquet et al, 2009; Hoogland et al, 2007; Hu et al, 2006; Grunert, 2002). This may explain the finding from case studies in other areas that increased awareness and visibility of labels does not necessarily translate into increased purchases (see, for example, Jacquet et al, 2009, on dolphin-friendly, fishery and eco-labels).

The existence of widespread psychological barriers to engaging with animal welfare, along with low involvement with (and even negativity towards) labels, raises questions about
whether a welfare label is the most effective tool for communicating with most consumers, and the scope for welfare labelling to make a difference to behaviour.

**Existing animal welfare labelling schemes**

Many of these general comments about the potential efficacy of animal welfare labelling are illustrated in practice by existing welfare labelling schemes, which, despite being recognised or supported by some consumers, are yet to break into mainstream consumer consciousness and purchasing decisions.

Both the literature and our focus groups showed that recall, recognition and understanding of existing animal welfare labels is limited (see also section 2.3). When labels are brought to the attention of consumers, many do not understand them or find them meaningful. For example, one study showed that the best-recognised logo, the Red Tractor, was recognised by 35% of consumers, and understood by just 2% (FSA, 2010). Similarly, Schroder and McEachern (2004) found that, “Farm and Assurance Quality labels were perceived not to be backed by statutory standards and consumers concluded they meant little. Many labels are seen as evidence of minimum standards rather than added value.”

As noted above in section 2.3, as well as confusion and misunderstanding, participants often expressed mistrust of labels, supermarkets, and the food supply chain in general.

\[F: \text{There was a thing on the news about how they had one of the lambs, there was a picture of the lambs in a field on the front of it, but if you read into it they weren’t actually brought up in any of that kind of environment, or even in this country I don’t think. So sometimes the packaging can be quite misleading as well.}\]

*Group 10, East Anglia (rural), ‘Always buy higher welfare foods’*

The core aims of a label are to help consumers to identify products, encourage them to buy products by building trust and reducing risk, and to provide information about the nature of those products, including values-based considerations (McEachern and Schroder, 2004; Addie and Lewis-Hodgeson, 2010). It seems clear from the evidence of low recall, recognition and trust, that existing welfare labels are not fulfilling these functions as effectively as they might, and are therefore not helping consumers to make higher welfare choices.

There are various explanations for the low profile of existing welfare labels, in addition to the absence of animal welfare as a primary motivator of decisions (see section 3.3 below for further discussion). As Mintel (2006) points out, ethical brands often lack funds for large scale advertising, and low recall and understanding of existing labels may be partly linked to a lack of publicity. However, the overall evidence suggests that, even with plentiful funding, the scope of a label to make a difference to behaviour may be limited among many segments of the population by a range of other factors. As we have demonstrated here, principal among these factors is a lack of consumer engagement with the issue of animal welfare. This lack of engagement means that consideration of animal welfare is superseded by other factors, such as taste, and assumed to be inherent in ‘quality’, judged by cues such as price and branding.
3.3 What would make an effective label?

The evidence from the literature and the focus groups presents a series of limitations to the use of labelling as a means of encouraging higher animal welfare purchases among the majority of the population. However, this is not to say that labels have no role to play as one part of a wider set of policy and communications tools. Within the context of broader communication and education strategies that aim to increase overall engagement with animal welfare, labelling could play a part in increasing awareness of the issue by acting as a prompt or reminder (both in store and at home), as well as functioning as a guide to purchase decision-making that is actively sought out by consumers with increasing awareness.

In addition, evidence from the literature and focus groups suggests that there are some consumers (albeit a small minority) who are already willing to pay more for higher animal welfare products, and for whom there are genuine informational barriers to increasing purchases (see section 2.3).

On this basis, labelling options were explored with focus group participants in order to begin to build up a picture of what types of information, in what kind of format, appealed most to different groups of people. However, in view of the preceding sections, the findings presented in this section are subject to the caveat that a label, however well designed, has limited scope to be the main driver of behaviour change among the majority of consumers.

The label testing exercise took place in the second round of focus groups, and centred on mocked-up labels that aimed to explore the effectiveness of different variations of the following elements:

- Design and format - for example, ‘seal of approval’ or graded system (e.g. bronze-silver-gold);
- Level of detail of information;
- Key terms;
- British vs EU origin; and
- Accrediting bodies.

A selection of the mock-ups are shown in the section below to illustrate the main themes that emerged from the label-testing exercise. It is important to note that the mock-ups were designed specifically to test the different elements of labels outlined in the list above, rather than as suggestions for actual label options.

Simple labelling is required

Consumers demand simple cues that require minimal time investment and engagement, and that provide an instantly recognisable beacon for decision making. This applies to food labelling and labelling in general, as well as to animal welfare labelling (see FSA 2010).

F: You get Fair Trade logos on things and you know, even if you can’t read, you still know Fair Trade is Fair Trade

Group 4, North West (urban), Positive Greens and Concerned Consumers

September 2010
Previous research has found that having both a logo and detailed information on the label “helps consumers to base their purchasing decisions on their own personal values” (FSA, 2010). As such, we used the mocked-up labels to explore the level of detail, and types of information, participants preferred. We also tested reactions to a ‘graded’ system of evaluation, using a bronze-silver-gold model, versus simple, ‘seal of approval’ models. The idea of Label A (Figure 8) was that different aspects of animal welfare would be assessed as bronze, silver or gold, with gold representing the highest welfare standard.

Reactions to this label were generally negative: participants found the level of detail too much, and the type of detail off-putting.

F: It is too much on there.
F: People haven’t got time to read all of that.
M: No, that is too busy.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

Reactions to the appearance of the word ‘slaughter’ were particularly negative, which is perhaps related to participants’ resistance to associating food too closely with animals, and to information about the processes involved in bringing animal products to market. There were suggestions from some that seeing the word ‘slaughter’ on the pack would dissuade them from buying the product at all.

A graded system also raises the question of what comparisons consumers would draw between the different grades, and in particular, how the lowest grade would be interpreted. Participants responded negatively towards having a relatively ‘lower’ welfare standard actively brought to their attention, and again suggested that the effect might be to put them off purchasing the product.

F: If I saw that bronze and slaughter, I would go no way.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’
Alternative graded systems were suggested by participants, starting with a simple traffic light scheme (like nutrition labels), which was quickly dismissed due to the negative connotations of ‘red’ welfare labels. Participants in one group pointed out that retailers already have a system of quality gradation in place (for example, value; regular; premium), which is a key cue used to judge quality. If, for example, premium lines included in their branding a particular standard of animal welfare, the need to think about a separate label would be bypassed, and consumers’ existing understanding of supermarket product differentiation could provide a foundation for communicating information about welfare.

Some participants questioned the idea of differentiating between welfare standards, suggesting that animal welfare is (or should be) a matter of either meeting a single standard or not. This again highlights the desire to have a simple formula that allows a decision to be made, without having to go into the uncomfortable details, as well as the view that animal welfare ought to be the responsibility of others, such as the supply chain and the government.

M: Why would you need gold, silver and bronze? They are either looked after or they are not.

Group 10, East Anglia (rural), ‘Always buy higher welfare foods’

A small minority of participants reacted positively to the information the bronze-silver-gold label system gave them, but overall, it was not a success with the majority.

M: If you made it very standardised, you would quickly notice the gold, silver, bronze...you could quickly zone in on what it is.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

In contrast, label B in figure 9, below, which contains much less information, produced more positive reactions.
M: It looks good.
W: It's clear. Animal welfare stands out.

...  
M: That one actually makes you feel better...it says ‘animal welfare’ in bold.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

The contrasting reactions to these two labels supports the evidence in section 2.3 that consumers often resist engaging with the issue of animal welfare on a rational, reasoned basis, and prefer a simple, instantaneous ‘beacon’ that allows them to have confidence in standards, without going into the details.

‘Britishness’ is an important cue for quality

In line with the findings of the literature and wider discussions, there were almost universally positive responses to British (union flag) labels. Reactions to Label C (Figure 10) illustrated the high levels of trust in British food found elsewhere.

Figure 10 – Label mock-up C
British origin was linked to quality, safety and ‘standards’ in general, again hinting at implicit trust in British standards, and the perception that British supply chains contain fewer unknowns, and are therefore more trustworthy.

*M:  If it says British standard I don’t think you can go far wrong.*

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

In contrast, there was an almost universally negative response to the label with an EU flag (Figure 11).

**Figure 11 – Label mock-up D**
In fact, many participants thought that the EU flag portrayed a lower standard of farming, perhaps linked to the perception that an EU standard would be defined by the lowest common denominator.

\[ M: \text{The quality of the upkeep in France is not a patch on the quality that we have in this country.} \]

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

Many participants expressed an active wish to buy products that supported what they perceived to be their local economy, and the idea of ‘Fair trade for British farmers’ came up independently in different groups, although perhaps received most support among rural residents.
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**F:** We would quite like to see Fair Trade written on milk and perhaps the name of the farmer, where the milk came from, a local farmer. If the supermarkets sold more of that, rather than foreign milk.

**Q:** If that was on the milk in the supermarket would you, what would that tell you, the name of the farmer?

**F:** It is local and it is British.

---

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

This attitude links to the widespread desire, discussed in section 2.2, for participants to feel connected to where their food comes from (the IGD (2007) calls this demand for ‘authentic’ food), and again to the idea that shorter, national supply chains mean fewer unknowns and more trustworthy ‘standards’.

**Accrediting bodies and vested interests**

A central factor of trust in standards is perceptions of the accrediting body behind those standards, and participants expressed a strong preference for the accrediting body to be explicitly mentioned on the label. In general, there was support for an independent accrediting body, rather than self-regulated schemes. As noted above in section 2.3, there was little trust in retailers as accrediting bodies of welfare schemes, due to the perception that profit would always come first for the supermarkets. Similarly, despite their high levels of trust in British standards, some participants expressed scepticism about the ability of central government to administrate an animal welfare scheme. However, this mistrust of government may be better defined as a mistrust of politicians: many participants did express trust in government as enforcers of regulation, with some spontaneously mentioning bodies such as the Food Standards Agency (FSA) and Defra (as known as MAFF to some rural residents) as preferred accrediting bodies.

**M** You’ve got the Food Standards Agency haven’t you I believe? Wouldn’t it just be simpler if they got rid of all that [i.e. different labels] and just had that label on everything and then took control of everything.

---

Group 3, East Anglia (rural), Concerned Consumers

This highlights one of the main criteria people had for trusting an accrediting body: that the organisation had the expertise to qualify them to make a judgement, and did not stand to gain commercially from a scheme. It is perhaps for these two reasons that charitable bodies such as the RSPCA were frequently mentioned by participants as preferred accrediting bodies (see also McEachern et al, 2007; for a contrasting perspective, see Brook Lyndhurst (2004) which found that some respondents perceived charities to lack the funds and resources to enforce standards).

**F:** As you were saying, the RSPCA, they do such a fantastic job and all they worry about are animals.

---

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’
Standardisation of standards

A trusted accrediting body is one element of a wider need for ‘substance’ behind a label. The literature finds that knowledge of, and confidence in, the standards behind a label is a key element in the label being a trusted and effective tool (McEachern and Warnaby, 2008; Frewer et al, 2005), and our focus group participants gave a similar impression. Many participants had no desire to be fully acquainted with the standard behind the label, but wanted to know that there was some form of accountability and enforcement, and that information was available should they decide to want to see it. The Fair Trade and Red Tractor logos provide examples of this – both labels are relatively well recognised and are meaningful to many of those consumers who recognise them (see section 3.2), without those consumers necessarily knowing the full details of what the label represents.

There were widespread calls among participants for harmonisation of the schemes and standards behind labelling schemes. Inconsistency across retailers was perceived to be a particular problem by many, and many participants expressed a wish to see some kind of objective yardstick by which to judge the plethora of claims made by different products, labels, brands and organisations.

\[\text{M: Yes there needs to be something, there needs to be a set standard, a UK standard that you can recognise wherever you are. We have all said Sainsbury’s do a thing, Tesco’s do a thing, Marks & Spencer’s do, but everybody at the minute is doing their own thing, it just needs to be and then we would know where we are, wherever you are.}\]

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

Voluntary or mandatory schemes?

Different views were expressed about whether welfare schemes should be voluntary or mandatory. Some participants stated that they would assume a product without a label to be of a lower standard than a product with a label, suggesting that a voluntary scheme would be an effective means of allowing consumers to differentiate between products and levels of welfare standards. However, participants foresaw various limitations of voluntary schemes, not least uptake by producers.

\[\text{M: I can’t imagine a farmer being that willing to put bronze on their thing and put it on a shelf next to a gold. With the best will in the world, OK then increase your thing, “No I just won’t have the label”.}\]

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

Some participants expressed a preference for higher welfare schemes that were enforceable by law – for example, the RSPCA was mentioned as a favourable accreditation body because participants believed that they would be able to prosecute if standards were not adhered to.

Overall, whether a scheme was voluntary or mandatory was not discussed in great depth by participants, and it is unclear what difference the nature of the label would make to real purchasing behaviours. Given consumers’ reluctance to think too much about animal
welfare, and their demand for simple, instant cues to guide decision making, the differences between a voluntary and a mandatory scheme may be less important to consumers than simply having access to a ‘beacon’ (of any kind) that simplifies decision making.

Favoured terms
There was a preference across groups for words such as ‘monitored’ and ‘audited’, which gave the impression of consistent checks and enforcement.

F: I think with monitored as well it sounds like an on-going, watching.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

Participants also responded positively to labels including the word ‘guaranteed’, with most finding this simple endorsement more “user friendly” than the graded schemes with more detail about different aspects of welfare. This perhaps hints again at a preference for a simple, ‘seal of approval’ model, rather than systems that require comparative judgements to be made (e.g. a grading system) and systems that transmit specific information (for example, about different aspects of welfare). This again suggests that there is little demand for very fine-grained differentiation between products based on welfare standards.

F: I don’t think the labelling should be so fussy. I think it should just be a, something that catches your eye. I haven’t got time to go to the supermarket and read the gumph of a lot of different things. You just want an advertising campaign going round and you go in to the shops and you have got the one label that applies to everything.

Group 8, South West (rural), ‘Sometimes/occasionally buy higher welfare foods’

Although some words and phrases were preferred by participants, various people commented that “anyone” can write terms such as ‘quality’ or ‘standard’ on their product, and in the absence of an objective benchmark or check, these terms often mean very little.

The need for wider promotion of labelling schemes

M: Again, without a huge advertising campaign that gets everybody wanting to buy this, it is not going to work.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

Participants were very clear that, in order for a label to be meaningful, wider information and publicity around that label is required. Some participants suggested that this may be one of the problems with existing welfare labels – they have not been well publicised enough for people to understand and notice them.

M: I see a logo and that means nothing to me. If you have been educated to what that logo means then seeing it as a glance you can instantly relate what that logo means to you.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’
Information provision around the label would help to increase recognition of the label, and also links to the requirement for the label to be transparent in terms of the standards it represents. Many participants gave the impression that they might not access certain types of information about a label (for example, a website containing details), but knowing that the information was there if they, or others, should want it, was often sufficient.

**Summary**

In summary, consumers’ priorities for animal welfare labelling reflect those for food labelling in general. Most people have a preference for a simple cue that minimises the cost of decision making and allows them to trust, on an emotional basis, that food products are quality/healthy/tasty plus ethical/happy/feel-good (currently, ‘Free range’, ‘British’ and ‘local’ are cues used by many for this purpose). A smaller proportion of participants did express a desire for more detailed information, either on a label itself, or somewhere in the background (e.g. on a website), although the simple existence of such information was sufficient to build trust among the majority.

Trust in a label and what it represents is of central importance. Trust can be built – or undermined – through the accrediting body of a scheme, and participants expressed a desire to see organisations with the required expertise and no vested commercial interests overseeing higher welfare schemes.

Marketing of any label is required to make that scheme recognisable. A recognisable logo, however, is not sufficient for consumers to find a label meaningful. Most participants stated that an objective standard was required against which to judge higher welfare claims, as they perceived that there is little consistency across products, labelling schemes and retailers.

There are various inferences that we can draw from the focus group and literature evidence on what makes labels most effective. However, even a well-recognised, trusted and understood label is not a guarantee of changes in purchasing habits. The influence of information in general is proportionate to the level of perceived personal relevance of the issue (Verbeke, 2007), and in the absence of consumer engagement with animal welfare, even the best designed higher welfare label will have limited impact.

### 3.4 Other options

A higher welfare label is just one option for encouraging purchases of higher welfare products, and there are various alternatives, plus a range of options that could work alongside a label.

**Market led**

**Improve publicity around existing schemes**

One option for increasing purchases of higher welfare products is to improve recognition, understanding and use of existing higher welfare labelling schemes such as the Freedom Food mark, as well as the standards (explicit or implied) behind some own-brand products. Improved publicity and marketing of these schemes could be an effective means of raising consumer consciousness of animal welfare and bringing concern for animal welfare into mainstream purchasing behaviours.
Various strategies may be needed to heighten the profile of higher welfare products and increase consumer confidence. One such strategy could be to improve consistency across products and retailers of the types of information on welfare that are communicated to consumers. For example, common standards in terms of the information provided about different schemes (for instance, the aspects of animal welfare that are covered) could help decision making among those consumers who are concerned about animal welfare by allowing them to compare across schemes and retailers.

**Branding**

New products that make higher welfare claims as part of their brand are beginning to emerge – for example, the ‘Happy Eggs’ brand has contributed significantly to sales of free range eggs (Allison, 2009), thanks to TV advertising campaigns that focus on the wellbeing of its hens. Consumers find branding a useful cue that communicates bundles of values in an instantly recognisable way (FSA, 2010), so including higher welfare as part of a brand package, including supermarket own-brands, may be an effective option.

**Government-led**

Although supermarkets and brands may be well equipped to communicate with consumers about higher animal welfare, the market-led approach may be limited if an increase in products making higher welfare claims results in increased consumer confusion. In the absence of an objective standard against which to judge higher welfare claims, confusion about welfare claims could undermine trust in both new and existing labelling schemes.

There may, therefore, be a role for government in setting out definitions of a higher welfare standard or standards, against which all higher welfare claims could be measured. Many consumer decisions relating to higher welfare are currently based on tacit judgements about production systems – for example, many consumers equate free range systems with higher welfare – and on cues such as ‘British’ or ‘local’. These purchasing cues do not necessarily always result in the best welfare outcomes, suggesting that there is a need for standard definitions of higher welfare that are independent of production system, origin, or branding.

**Choice editing**

The IGD (2007) reports that, “Consumers are supportive of higher welfare in principle, and would prefer choice editing to having a choice between higher welfare and standard foods.” Brook Lyndhurst (2004) highlights the potential effectiveness of ‘top-down’ intervention, citing the case of unleaded petrol, which is now the default choice as a result of favourable taxation. Focus group participants often made a similar case, suggesting that the most effective means of improving standards of animal welfare was to raise the minimum legislative standards.
F: Why don’t we just make a minimum standard? Why don’t you make a minimum standard and make it so that everyone has to do it? Like there is about slaughter already and about animals can’t go offshore alive. There is legislation, can’t we just crank that up and then RSPCA or somebody, that is their thing, animal cruelty is their thing.

Group 6, London, ‘Sometimes/occasionally buy higher welfare foods’

Many consumers already edit their own choices by shopping at particular supermarkets. This strategy enables consumers to feel confident that they will fulfil their needs and shop according to their values, without having to make difficult choices between different types of product. This personal choice editing through choice of retailer, like product choice, is likely to be on general ‘quality’ grounds, and if animal welfare is considered, it is included as one part of this more general idea. There may therefore be potential to work with specific retailers to include concern for higher animal welfare as part of their buying practices and branding. It is important to note, however, that external barriers, such as the availability of those supermarkets in a local area, and the financial means to shop at them, may limit this approach for some consumers.

Education

Whichever combinations of options are used to encourage purchases of higher welfare foods, there is one requirement that underpins them all: the need for consumer education. There was strong consensus among participants at the stakeholder workshop (see annex 8) that consumer education about animal production is necessary for increasing demand for higher welfare products.

It was suggested that this education should begin at school: many thought that a lack of engagement with the issue of animal welfare (and therefore low willingness to pay for welfare attributes) is partly due to a disconnection with, and lack of understanding of, food and farming in general.

In addition to more formalised education via the national curriculum, there are a plethora of options and media for communicating with consumers to increase awareness, understanding and engagement with the issue of animal welfare. Focus group and stakeholder workshop participants provided a huge number of ideas for innovative ways to reach different types of consumers with messages about higher animal welfare, from mobile phone bar-code scanning of products, to social marketing to tap into ‘peer pressure’ (or social norms), to comparison websites. Annex 8 contains a summary table of the ideas emerging from the stakeholder workshop.
4 Summary: are labels the answer?

The evidence in this report has shown that:

**Animal welfare is not a primary motivator**

Despite its reported importance, animal welfare is not a primary motivator of decision making for most people, most of the time: in reality, it is for most people at best an outcome achieved via other priorities, if it is considered at all.

**Animal welfare is secondary to, but associated with, quality, health, taste, and other tangible product attributes**

Consumers (mostly subconsciously) associate higher welfare with ‘quality’, indicated by price, branding (both product and retailer branding) and perceptions of ‘good/authentic’ food. Ethical concern for animal welfare is inextricably linked by consumers to a number of product attributes, such as product quality, health, taste and safety benefits. Within these associative networks, the priorities, and the primary motivators of purchasing decisions, tend to be these tangible, personally relevant product attributes. Even those people who buy some higher welfare products may do so not because they are motivated specifically or solely by the welfare of the animal, but because animal welfare is one part of the quality package they seek.

**Internal, psychological barriers are the key issue for most**

Barriers such as the influence of habit, a lack of awareness, wilful ignorance and transfer of responsibility are the key issue for most. These barriers preclude direct engagement with the issue of animal welfare, meaning that animal welfare is generally not a conscious consideration at the point of purchase. This insight into internal barriers is the key to understanding relatively low purchases of higher welfare products.

**External barriers: availability and price**

External barriers such as availability can be a barrier for those consumers who are active purchasers of higher welfare products. However, since higher animal welfare per se is not actively sought by most, availability is not a major barrier overall. Higher prices may be a barrier to consumers being able to purchase the level of quality they would prefer (which may or may not entail a higher welfare choice), but internal barriers, rather than price, are the more important barriers to making higher welfare choices specifically on the basis of welfare considerations.

**Informational barriers exist, but are not a key explanation of inaction**

Existing information sources are not succeeding in communicating effectively with consumers, who feel at the same time overwhelmed by, and (when prompted to think about it) lacking in, information. However, demand for understanding and knowledge of the details of animal production and welfare is minimal.
Communicating with consumers about animal welfare

These key findings raise several questions relating to communicating with consumers about animal welfare, both in general and with regard to labelling as a tool.

Should communications (including labels) be centred on animal welfare?

Animal welfare as a stand-alone, ethically framed issue is not a primary concern for most shoppers, and does not seem to be the ‘way in’ for the majority. Despite the declared importance of the issue, in a purchasing context, ethical or values-based considerations are generally secondary to tangible, personally relevant considerations. Although the ethical aspects of animal welfare (or perhaps ‘animal welfare as a good in itself’) are associated by many with more tangible product attributes (particularly quality and healthiness), within this network of associations, the tangible attributes are prioritised by consumers: in the absence of (perceived) quality improvements, most consumers would be even less prepared to pay extra for higher animal welfare.

Since most consumers, however ethically engaged, do not shop on the basis of single issues, it seems that information provision centred solely on animal welfare may not be ‘heard’ by the majority. In addition, welfare labels tend to emphasise the symbolic, altruistic aspects of the issue, which is not a high priority for consumers. In fact, it is the tangible benefits provided by higher welfare foods that consumers are most interested in, motivated by, and willing to pay for.

Situating the issue of animal welfare within the wider context of food and farming may make information on animal welfare more accessible and meaningful to consumers

In light of a lack of (and resistance towards) ethical engagement with the issue of animal welfare within a purchasing context, the existing associations consumers make between higher animal welfare and ‘good food’ (in terms of improved quality, taste, healthiness, and safety, as well as an improved connection to food via local and ‘authentic’ products) could provide a more effective basis for making information about welfare accessible and meaningful to consumers.

There is a need for a common standard against which to judge higher welfare claims

The evidence suggests that situating animal welfare within a wider food context may be the most effective strategy to provide consumers with information about animal welfare standards in a way that is accessible and meaningful to them. Building on existing understanding and associations may be one means to achieve this. However, within this wider ‘food story’, a common standard of ‘higher welfare’ is required to ensure that higher welfare claims are based in truly higher standards. There is currently no common standard against which to judge higher welfare claims, and as a result, uncertainty exists not just among consumers, but throughout the supply chain, about what exactly ‘higher welfare standards’ are. A common standard against which to measure and judge higher welfare claims would resolve this definitional problem, provide a basis for building consumer trust and confidence, and ensure that consumer choice does result in higher animal welfare.
Labels, on their own, have limited scope to make a difference

On its own, the provision of on-pack information is unlikely to be sufficient to activate latent values, break long-standing habits and overcome the psychological barriers to consumers incorporating consideration of animal welfare into their purchasing decisions. Various conditions must be in place before a label can begin to make a difference: an increasing body of evidence suggests that labels are used on a ‘need’ basis – that is, labels are sought out and used mainly by those who are already interested in an issue, and for whom the issue is already a purchasing choice criterion (FSA, 2010). Concern for animal welfare while shopping is currently not the ‘norm’ among consumers, and there seems to be little social expectation or pressure on this front, except at the most abstract level.

There is currently little demand for information about animal welfare standards, and simply providing information on a label is unlikely to change this: consumers tend to pay little attention to labels in-store; there are myriad factors competing for consumer attention; and the issue of animal welfare itself is subject to a range of psychological barriers.

The need for wider attitude change and engagement with the issue of animal welfare was linked by both discussion group participants and expert stakeholders to a need for more general education about food and farming. A lack of knowledge and understanding about where food comes from and how it is produced was identified by many stakeholders as the foundation of many of the psychological barriers that exist around consumer engagement with animal welfare. There was consensus among stakeholders at the workshop that a longer view of this issue is necessary – that tackling this engagement deficit must start with childhood education about food and farming.

Existing or new labels?

A further limitation of labelling is that general negativity towards packaging and labels, and a feeling of ‘information overload’, is common among consumers. This may be in part why existing higher welfare labels are not well recalled or recognised by most consumers.

Another reason for poor recall, recognition and uncertainty around existing labels, however, may simply be a lack of publicity. Although publicising existing labels may not be sufficient to awaken latent values in most of the population, it could overcome some of the informational problems identified in this report that may pose a barrier to those consumers who already do have an interest in purchasing higher welfare products.

Links to environmental issues

A secondary research question explored through this project was whether consumers perceive links between higher animal welfare and environmental issues, and as such, whether Defra’s environmental segmentation model could provide a common framework for policy and communications in both areas. The simple answer is that focus group participants did not associate these two issues, and in fact viewed them as separate and distinct. Having said this, there do seem to be some common factors, at the level of values and attitudes, that seem to underpin ‘ethical’ purchasing habits, which are often manifested in the purchase of both ‘eco’ and higher welfare products. However, it is clear that the two domains of higher animal welfare and environmental issues are subject to a range of distinct behavioural and attitudinal drivers and barriers, and as such should not be thought of as equivalent from a policy and/or communications perspective.
Are labels the answer?

In summary, the evidence presented in this research suggests that animal welfare labelling on its own would have a limited effect on purchasing behaviours: informational barriers are not currently the main reason why most UK consumers do not translate their values and attitudes around animal welfare into action in the supermarket.

Information provision is likely to be invisible or meaningless to consumers who are not already engaged with the issue of animal welfare. This suggests that broader attitude and values changes in this area would be necessary to create the conditions in which consumers actively seek information about animal welfare standards.

Whichever means are chosen to communicate with consumers about animal welfare – whether through labelling, publicity, education or behaviour change campaigns – a common definition and standard of 'higher animal welfare' is a necessary starting point, to create a level playing field for producers and retailers, and to ensure that higher welfare claims are translated into actual higher standards of welfare.
Annex A - Bibliography


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Potential Implications of Animal Welfare Concerns and Public Policies in Industrialized Countries for International Trade


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Annex B - Literature review: the EU perspective

The growth in consumers’ expressed concern for animal welfare has been quantified in many national and pan-European consumer surveys which generally suggest a high level of concern in the population as a whole. For instance, one survey covering 11 European countries found that, in 10 of the countries, more than 70% of respondents agreed ‘strongly’ or ‘slightly’ with the statement “I worry about the welfare of animals used for meat production.”

There are concerns, however, that these studies have not been conducted in a consistently rigorous manner across the individual countries, a fact which limits researchers’ understanding of consumer motivations. Furthermore, neither a consumers expression of concern for animal welfare nor expression of willingness to pay (WTP) for higher welfare products necessarily translate into real-world purchasing habits. For this reason, non-hypothetical consumer choice experiments are required to more accurately establish the true preferences and WTP of consumers.

Motivating factors for consumers of welfare-labelled products

The available evidence suggests that concern about farm animals is real in the European Union, but that understanding of the motivation and nature of such concerns is weak. There are two possible interpretations of consumer motivation for welfare-labelled products:

- consumers have moral objections to the ways in which animals are treated;
- they view farm animal welfare to be associated with characteristics of animal products, for example safety and taste.

Survey results suggest that both of these interpretations are valid and that the concerns of individuals will reflect either or both factors. However, research indicates that the latter interpretation seems to predominate across EU consumers as a whole. While consumers may feel a moral obligation to avoid cruelty to animals and/or to care for animals, they perceive a number of personal benefits from high levels of animal welfare in terms of quality and/or safety of the end product. For example, consumers may view ‘free range’ as an important indicator of safety when purchasing chicken.

Furthermore, the motivations for purchasing welfare-labelled products do not appear to be consistent across either food product or country. Table 6 shows the results from asking survey respondents from seven countries, “Are the following factors very important?” where Kjaernes et al. found that the following percentages of respondents in Hungary, Italy, France, Great Britain, Netherlands, Norway and Sweden responded affirmatively for the following products:

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12 Ibid.
While these results show considerable variation between countries, there is a clear trend wherein the expressed importance of price is subordinate to environmental and animal welfare attributes in nearly all countries.

### Safety, taste and health

One of the findings that stood out across a number of the sources reviewed was the multitude of (sometimes contradictory) attributes that consumers associate with higher welfare products. Bredahl and Magnusson (2004) find, for example, that consumers expect such products to be better across all dimensions, as discussed above.

Table 7, below, from Brehahl and Magnusson (2004) provides a comparative look at the quality advantages that consumers expected from ‘outdoor pork’. Notice that the British respondents had the highest expectations for health, though the other nationalities also expected a ‘healthiness’ advantage.

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Table 7 – Stated expectations of quality advantages of outdoor pork over conventional pork: mean ratings (scale ranging from -3 = “extremely unlikely” to 3 = “extremely likely” with neutral point 0; standard deviations in parentheses).

<table>
<thead>
<tr>
<th>Country</th>
<th>Denmark</th>
<th>France</th>
<th>Sweden</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leanness</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>0.59</td>
<td>(1.18)</td>
<td>0.82</td>
<td>(1.48)</td>
</tr>
<tr>
<td>Freshness</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>0.69</td>
<td>(1.19)</td>
<td>0.70</td>
<td>(1.51)</td>
</tr>
<tr>
<td>Healthiness</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>1.10</td>
<td>(1.17)</td>
<td>n.a.</td>
<td>(n.a.)</td>
</tr>
<tr>
<td>Tenderness</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>0.85</td>
<td>(1.13)</td>
<td>0.83</td>
<td>(1.45)</td>
</tr>
<tr>
<td>Nutritional quality</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>0.99</td>
<td>(1.16)</td>
<td>1.23</td>
<td>(1.43)</td>
</tr>
<tr>
<td>Juiciness</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>0.94</td>
<td>(1.13)</td>
<td>0.81</td>
<td>(1.35)</td>
</tr>
<tr>
<td>Domestic origin</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>1.17</td>
<td>(1.10)</td>
<td>0.89</td>
<td>(1.27)</td>
</tr>
<tr>
<td>Taste</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>1.21</td>
<td>(1.17)</td>
<td>0.66</td>
<td>(1.35)</td>
</tr>
<tr>
<td>No hormone and drug residues</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>1.16</td>
<td>(1.20)</td>
<td>0.79</td>
<td>(1.23)</td>
</tr>
<tr>
<td>Nearby production</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>0.15</td>
<td>(1.26)</td>
<td>0.35</td>
<td>(1.36)</td>
</tr>
<tr>
<td>Animal welfare</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>1.48</td>
<td>(1.09)</td>
<td>n.a.</td>
<td>(n.a.)</td>
</tr>
<tr>
<td>Low price</td>
<td>Mean</td>
<td>(SD)</td>
<td>Mean</td>
<td>(SD)</td>
</tr>
<tr>
<td></td>
<td>-0.95</td>
<td>(1.22)</td>
<td>-0.81</td>
<td>(1.37)</td>
</tr>
</tbody>
</table>

Bredahl and Magnusson (2004) summarise the dynamics shown in the table, saying “…consumers currently appear to confuse different systems such as free-range, organic, and indoor with-outdoor access. Clear distinctions, including certification and labelling systems, are clearly required here.”

It would seem that consumers simply do not know what the different labels mean. Despite this they do seem to believe that, in general, labels (any labels) mean that a product is ‘better’ (in any/every way). This is a difficult situation because unrealistic and unmet expectations can lead to consumers definitively turning away from a product while, at the same time, too much information on a product can also discourage information-saturated consumers. This balancing act is a major challenge for policy-makers, producers and retailers alike.

Impediments to purchase: What factors explain the ‘value-action gap’?

Despite the expressed importance of animal welfare to consumers, there is evidence of ‘wilful ignorance’ as a response to the cognitive dissonance experienced when consumers
are unable to align their buying habits to their values\textsuperscript{18}. A significant sub-section of consumers simply did not want to know about the animal welfare conditions of the foods they consume. Indeed, many consumers seem to deliberately avoid knowledge about these issues so that they will not have to face up to difficult ethical dilemmas.\textsuperscript{19}

In addition to these psychological barriers to greater preference for higher welfare products, Binnekamp and Ingenbleek\textsuperscript{20} identify several institutional and informational barriers to the animal welfare-labelled products. These include:

- the low involvement of consumers in the purchase decision, where simplifying heuristics such as image, price, brand and past buying behaviour are often used to choose a particular product without consideration of one’s values;
- a more significant response among consumers to negative information, whereby they are more likely to reject a product because it is ‘bad’ rather than select a product because it is ‘better’ on animal welfare;
- the influence of context on reinforcing established purchasing habits, making it more difficult to sell increased welfare products in the traditional supermarket environment;
- the misunderstanding of the information provided by a label, such as the true provenance of ‘barn’ eggs; and
- unfulfilled consumer expectations as a result of ‘halo effects’, such as the expectation that products offering increased welfare attributes will be better on all dimensions including flavour and texture.\textsuperscript{21}

\textbf{Price as an impediment to purchase}

Price was discussed most explicitly in two of the sources reviewed, Andersen (2002) and Olesen et al. (2010). In Andersen’s survey of Danish egg purchases, it was found that the willingness to pay (WTP) for higher welfare eggs depended largely on the store where the survey was conducted. In a store that emphasised quality over price, consumers were generally willing to pay more for higher welfare eggs whereas shoppers at a ‘value-oriented’ store were not.

This is significant as it goes beyond traditional socio-demographic measures (which are surely at play as well) and includes the effect that habit and environment have on willingness to pay. That is to say, rather than stating, “Wealthier consumers are willing to pay more for higher welfare labelled products,” it may be more accurate to state, “Consumers who are willing to pay more for branded products (based on a perception of higher quality) are willing to pay more for higher welfare labelled products.”

\textsuperscript{18} Mayfield, L. E. et al. 2007. Consumption of welfare-friendly food products in Great Britain, Italy and Sweden, and how it may be influenced by consumer attitudes to, and behavior towards, animal welfare attributes. International Journal of Sociology of Food and Agriculture 15(3).


\textsuperscript{21} Bredahl, L. And M. Magnnusson. 2004. Consumer expectations of the quality of pork produced in sustainable outdoor systems. SUSPORKQUAL Deliverable 22: Determination of the weighting of factors influencing attitudes to pork in different countries.
Olesen et al. (2010) demonstrate in their non-hypothetical choice experiment on salmon purchases that, despite a small WTP for higher welfare salmon, any perceived deficiency in other quality attributes (such as colour) can very quickly overcome this WTP, driving consumers to purchase conventionally farmed fish. This paints a picture of a consumer who may be willing to pay more for higher welfare products, but only up to a point, and only so long as other quality attributes remain equal or superior to the conventional product.

With regard to the differences between British and continental European consumers, Table 7 suggests that Danes and the French are less likely to expect low prices from higher welfare products than are the British. Nevertheless, intra-country variations in WTP may be sufficient to overcome any conclusions that might be drawn on the differences between countries (the standard deviations for ‘low price’ in Table 7 are relatively large compared to those of other attributes, especially in the UK and Denmark). Future study could examine the variation in responses in the focus groups according to the individuals’ WTP for branded goods.

**Links between purchasing higher animal welfare products and pro-environmental attitudes and behaviours**

Specific, quantitative data on the link between purchasing higher animal welfare products and pro-environmental attitudes and behaviours has proved difficult to locate. Borgen et al. offer the following general, qualitative assessment:

> Consumers’ growing engagement for animal rights and welfare seems to coincide with a similar concern for the environment in general. As such it joins concerns [...] where the negative unintended side effects of technological and economic development exceed the intended positive effects.

**Links to pro-environmental attitudes and behaviours**

Although hard data has been difficult to come across in the sources reviewed, there seems to be some coincidence between pro-environmental attitudes and WTP for higher welfare products. Further research might focus on whether the driver for WTP for both ‘higher animal welfare’ and ‘low environmental impact’ products is the same one. If so, investigations into the trend towards WTP for intangible product attributes would be useful, determining the extent to which increasing incomes are the driver, compared with the influence of producers’ increased differentiation of products as a response to a saturated and increasingly competitive market.

**Impact of animal welfare and other values-based labelling schemes on purchasing behaviours and attitudes**

In a non-hypothetical choice experiment conducted in Norway, consumers demonstrated that they were on average willing to pay more for salmon fillets bearing an ‘organic’ label. This was also true for salmon fillets with the label of an organisation which they were told

---


guaranteed improved welfare for the fish.\textsuperscript{23} This finding, however, was dependent on the organic and increased-welfare fillets being the same colour as the conventionally farmed salmon as this is an important indicator of quality to the consumer.

Similarly, a study of 24,000 purchases of chicken eggs by almost 2,000 Danish families over the course of a year showed that consumers were willing to pay more for non-battery sourced eggs.\textsuperscript{24} In the case of a quality-oriented (i.e. not price-oriented) supermarket, 69\% of the families would pay more for ‘barn’ eggs, 46\% would pay more for ‘free-range’ eggs, and 60\% would pay more for ‘organic’ eggs. The higher marginal willingness to pay for organic eggs relative to free-range eggs results from the fact that organic eggs encompass more attributes (e.g. health, environmental sustainability) than do free-range eggs, which only concern animal welfare, and therefore attract consumers with various motivations.

When asked what sources of information have influenced their buying decisions in recent years, consumers in Italy, Great Britain and Sweden report that product labelling holds an important position in their purchasing decisions, though not as important as information received through the mass media, as shown in Figure 12.

Collectively, these observed and expressed consumer preferences for higher welfare products suggest that the labelling of such products has an impact on consumer purchasing behaviour, especially given consumers’ expressed desire for more information\textsuperscript{26}.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure12.png}
\caption{Animal welfare and consumer influencing factors\textsuperscript{25}}
\end{figure}

\textsuperscript{25} Mayfield, L. E. et al. 2007. Consumption of welfare-friendly food products in Great Britain, Italy and Sweden, and how it may be influenced by consumer attitudes to, and behavior towards, animal welfare attributes. International Journal of Sociology of Food and Agriculture 15(3).
\textsuperscript{26} Mayfield, L. E. et al. 2007. Consumption of welfare-friendly food products in Great Britain, Italy and Sweden, and how it may be influenced by consumer attitudes to, and behavior towards, animal welfare attributes. International Journal of Sociology of Food and Agriculture 15(3).
Importance of animal welfare considerations in relation to other product attributes

Studies of consumer purchasing decisions for pork and salmon indicate that customers expect products bearing an animal welfare label to be of equal or superior quality to conventionally sourced products.\(^{27}\) Similarly, consumers will reject labelled products if they perceive them to be of inferior quality, even if they are otherwise motivated to purchase higher welfare products.\(^{28}\) This suggests that quality (or perceived quality) remains the determining factor in consumer purchasing decisions and presents an additional challenge to welfare-labelled products.

With respect to environmental sustainability, there is evidence that this is deeply intertwined with animal welfare in both the design of food quality labels and the consumer understanding thereof. In Sweden, for example, the main ‘ecological’ labels, Krav and Swedish Seal, have animal welfare components but are mainly about the environment and healthiness of the food. Similarly, in Italy, there has been an increase in the range of food with animal welfare labels but the labels do not refer specifically to animal welfare but type of production system (i.e. outdoor or extensive methods of production).\(^{29}\)

More significantly, the ‘organic’ label is unanimously perceived as the most welfare friendly system of production across survey respondents in Italy, France, Hungary, UK, the Netherlands, Norway and Sweden.\(^{30}\)

Similarity of findings across countries

The level of consumer concern for animal welfare is both significant and homogenous at the European level. In response to the question, “How important to you in general is farm animal welfare?” 87% of the Italian respondents, 73% of the British respondents, and 83% of the Swedish respondents answered either ‘very important’ or ‘somewhat important’.\(^{31}\)

In contrast to the homogeneity of national average responses, considerable intra-national variability can be seen when examining store-level level data. In Denmark, for example, 69% of shoppers in a supermarket that emphasises quality over price were willing to pay extra for eggs that included higher animal welfare than battery eggs. This is contrasted with shoppers in a store which emphasises price over quality where only 36% of shoppers were willing to

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\(^{27}\) Bredahl, L. And M. Magunusson. 2004. Consumer expectations of the quality of pork produced in sustainable outdoor systems. SUSPORKQUAL Deliverable 22: Determination of the weighting of factors influencing attitudes to pork in different countries.


\(^{29}\) Mayfield, L. E. et al. 2007. Consumption of welfare-friendly food products in Great Britain, Italy and Sweden, and how it may be influenced by consumer attitudes to, and behavior towards, animal welfare attributes. International Journal of Sociology of Food and Agriculture 15(3).


\(^{31}\) Mayfield, L. E. et al. 2007. Consumption of welfare-friendly food products in Great Britain, Italy and Sweden, and how it may be influenced by consumer attitudes to, and behavior towards, animal welfare attributes. International Journal of Sociology of Food and Agriculture 15(3).
pay extra for such eggs.\textsuperscript{32} This is evidence of the influence of not only socio-demographic factors on WTP but of the influence of habits and attitudes on WTP as well.

In countries such as Sweden and Norway where there is a higher level of national animal welfare legislation, ensuring good animal welfare is considered the responsibility of governments through legislation by both consumers and farmers. Within these countries, there are correspondingly fewer products available that carry welfare-friendly labelling.\textsuperscript{33}

There is presently great variability in the availability of welfare-labelled products across the EU, ranging from 0\% of surveyed producer brand products in Italy to 92\% of manufacturer brand products in Norway.\textsuperscript{34}


\textsuperscript{34} Ibid.
Annex C - Recruitment materials and respondent profiles

Table 8 – Characteristics of round 1 focus group participants

<table>
<thead>
<tr>
<th></th>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defra segment</td>
<td>Positive Greens</td>
<td>Positive Greens and Concerned Consumers</td>
<td>Positive Greens and Concerned Consumers</td>
<td>Concerned Consumers</td>
</tr>
<tr>
<td>Location</td>
<td>London (urban)</td>
<td>Somerset (rural)</td>
<td>Liverpool (urban)</td>
<td>East Anglia (rural)</td>
</tr>
<tr>
<td>Age profile</td>
<td>18-34 (3) 35-50 (5) 51+ (2)</td>
<td>18-34 (3) 35-50 (4) 51+ (3)</td>
<td>18-34 (4) 35-50 (4) 51+ (2)</td>
<td>18-34 (2) 35-50 (5) 51+ (3)</td>
</tr>
<tr>
<td>SEG profile</td>
<td>AB (3) C1C2 (4) DE (3)</td>
<td>AB (2) C1C2 (5) DE (3)</td>
<td>AB (2) C1C2 (5) DE (3)</td>
<td>AB (3) C1C2 (4) DE (3)</td>
</tr>
</tbody>
</table>

Table 9 – Characteristics of round 2 focus group participants

<table>
<thead>
<tr>
<th></th>
<th>Group 5</th>
<th>Group 6</th>
<th>Group 7</th>
<th>Group 8</th>
<th>Group 9</th>
<th>Group 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Propensity to buy</td>
<td>‘Never’</td>
<td>‘Sometimes/ occasionally’</td>
<td>‘Usually/ often’</td>
<td>Sometimes/ occasionally’</td>
<td>‘Usually/ often’</td>
<td>‘Always’</td>
</tr>
<tr>
<td>Location</td>
<td>Manchester (urban)</td>
<td>London (urban)</td>
<td>London (urban)</td>
<td>Somerset (rural)</td>
<td>Somerset (rural)</td>
<td>East Anglia (rural)</td>
</tr>
<tr>
<td>Age profile</td>
<td>18-34 (3) 35-50 (4) 51+ (3)</td>
<td>18-34 (3) 35-50 (4) 51+ (3)</td>
<td>18-34 (4) 35-50 (2) 51+ (4)</td>
<td>18-34 (3) 35-50 (4) 51+ (2)</td>
<td>18-34 (3) 35-50 (5) 51+ (2)</td>
<td></td>
</tr>
<tr>
<td>SEG profile</td>
<td>AB (4) C1C2 (4) DE (2)</td>
<td>AB (3) C1C2 (5) DE (2)</td>
<td>AB (2) C1C2 (7) DE (1)</td>
<td>AB (2) C1C2 (6) DE (2)</td>
<td>AB (2) C1C2 (7) DE (1)</td>
<td>AB (1) C1C2 (6) DE (3)</td>
</tr>
</tbody>
</table>
## Annex D - Topic guide 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Instructions</th>
<th>Aim /research question</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.30</td>
<td>1. Warm up, introductions</td>
<td>Ice breaker; ground rules</td>
</tr>
</tbody>
</table>
| 5 mins | - Introduce yourself and Brook Lyndhurst  
- Toilets, fire drills, mobile phones  
- Purpose of groups:  
  - To explore why people do and don’t buy certain foods (i.e. not framed explicitly as animal welfare)  
  - Explain the need for honesty  
  - Healthy debate – no answer is ‘right’ or ‘wrong’, we want to understand their views  
  - Will ask that people don’t speak over each other and to allow each other the time to speak  
  - recorder can’t pick up what’s happening if everyone talks at once  
- Do want to hear about everyone  
- Confidential, but recorded  
  - voice recording used as back-up  
  - get permission  
- Spilt group into pairs and get each to find out the other’s name and favourite food. Each pair to report back. |  |
| 6.35 | 2. Exploration of salient product attributes | To explore the kinds of things people are thinking |
| 5 mins | Fact finding: *Where do people shop in <location>? Which supermarkets do people use?* |  |
**Group brainstorm:** *Imagine you’re in the supermarket (or wherever you do your food shopping). You’re in the fruit and veg section, and you’re buying some tomatoes. What kinds of things are you thinking about to help you decide which tomatoes to choose? What are you looking for? What influences your choice?*

*And what kinds of things are you thinking about when you buy*

- Eggs?
- Chicken?

Write down their ideas on the flip chart as they shout them out. It will be crucial to keep this fast-paced – we want to maintain the spontaneity and not give participants too much time to think, so spend up to about a minute on each (or until the ideas start to run out).

Once all four products have been brainstormed, go back and prompt on the following if they have not come up:

- Healthy eating
- Low packaging
- Locally produced
- Organic
- Animal welfare
- Carbon footprint
- Fair trade
- Food miles

about when they buy specific types of food products. Does animal welfare come up when people have little time to think about it and have to spontaneously shout out their ideas?

This first section is crucial, because they have not yet been primed with the animal welfare idea. It is for this reason that we have included tomatoes.
### 3. Relative importance of attributes

<table>
<thead>
<tr>
<th>20 mins</th>
<th>Pair-wise ranking (individual)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><em>I’m going to give each of you a sheet with a type of food on it. Imagine you’re in the supermarket buying that food.</em></td>
</tr>
<tr>
<td></td>
<td><em>On your sheet are lots of considerations that may or may not be important when you’re choosing which food to buy. For each pair of considerations, please circle the one of the pair that is most important. Don’t think about it too much, just circle the one that seems most important in each case.</em></td>
</tr>
<tr>
<td></td>
<td>Give each participant answer sheet 1 and give them 2 minutes to fill it in. <strong>Assure people they will have the chance to discuss these issues in more depth later on.</strong></td>
</tr>
<tr>
<td></td>
<td>While they do this, write the considerations in <strong>bold</strong> below down on the pieces of card.</td>
</tr>
<tr>
<td></td>
<td><strong>Pairwise ranking (group)</strong></td>
</tr>
<tr>
<td></td>
<td><em>In general, when you’re out shopping for whatever, which of these would you say would be more important. Put your hands up if you think this one is more important.</em></td>
</tr>
<tr>
<td></td>
<td>Use the ranking exercise as a basis for discussion of each pair.</td>
</tr>
</tbody>
</table>

- Country of origin

<table>
<thead>
<tr>
<th></th>
<th>How important are animal welfare attributes relative to other attributes?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Are there differences between meat and non-meat products?</td>
</tr>
<tr>
<td></td>
<td>Is animal welfare important to people; why/why not?</td>
</tr>
</tbody>
</table>
Show two cards at a time. Get participants to vote on each occasion which is most important, and discuss why.

Include the following pairings (in any order):

- Food miles vs animal welfare
- Healthy food vs local food
- Animal welfare vs healthy food

If there’s time/more mileage in this, also discuss any/all of the following

- Healthy eating vs Low packaging
- Animal welfare vs Carbon footprint
- Locally produced vs Organic
- Animal welfare vs Organic

**Associations with other products, issues and values (6.50)**

Split participants into pairs. Give each pair a set of cards with the issues written on them. Ask participants to put them into groups so that the similar ones are together. Each group or category should be given a name/description. They can have as many groups as they like. Remind them that there are no right or wrong answers. Explain to them how to fill in the recording sheet before you give them the cards.

Ask each pair to give a quick summary of what they put together and why.
IF YOU HAVE TIME, REPEAT THE SORT: Still in your pairs, I’d now like you to mix up all the cards and categorise them again. So put them into different groups, again so those that are similar are together – as many groups as you like, and make sure you give the group a name. You can record the new groupings on the other side of your form.

IF YOU DON’T HAVE TIME TO DO TWO SORTS, USE THE FOLLOWING QUESTION ON THE FIRST SORT: if you had to group your animal welfare category with any other category, which would you put it with?

General discussion

*Which ones are similar, which ones go together and why?* Remind them that there are no right or wrong answers.

Probe:
- Links between animal welfare and other issues
- Links between specific products or product types
- Do they categorise them with healthy foods? Sustainable foods? Which ones?
- Do they mention common motivations for doing these things and buying higher animal welfare products?

*Key question: how important are these considerations to people? Why/why not? And why is that important to people?*
(Remember laddering: attributes $\rightarrow$ consequences $\rightarrow$ values).

Look out for references to pro-environmental attitudes and behaviours – probe on these links if they come up.

- Do participants mention attitudes and behaviours relating to purchasing sustainable products, natural environment, any other home-based behaviours?
- Do they mention other issues in the context of animal welfare?

<table>
<thead>
<tr>
<th>7.00</th>
<th>4. Motivations and barriers to buying higher animal welfare products</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 mins</td>
<td>General discussion:</td>
</tr>
<tr>
<td> </td>
<td>Who here has ever bought free range eggs/free range chicken/freedom food meat/grass-fed beef? [Different product to be used in each group] Why was that?</td>
</tr>
<tr>
<td> </td>
<td>Probing on specific motivations mentioned</td>
</tr>
<tr>
<td> </td>
<td>- emotional reactions, ethics, values. Ask why those considerations are important to people – get down to the underlying values.</td>
</tr>
</tbody>
</table>

Leading on to:

Many people, when asked, say they would like to buy higher animal welfare food products. However, this attitude is often not translated into action – sales of higher animal welfare products are quite low. Why do you think this might be?

What motivates people to buy animal welfare products; what barriers stop them? By setting out the value-action gap, we set up a norm whereby it's acceptable to talk about the barriers.
### Explore the following questions

- What stops people from buying higher animal welfare products?
  - Unpack different barriers that come up
  - Probe on time; forgetfulness; price; availability; habit; understanding/trust/clarity of labels

Write key barriers up on flipchart

**Ranking exercise:** Which of these would you say are the most important things that stop people buying more higher animal welfare products?

Put participants in pairs and get them to identify the five most important ones, and rank those in order of importance, 1-5 (one being the single most important factor that stops people buying them). Report back to the group.

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**5. General understanding of the concept of animal welfare**

<table>
<thead>
<tr>
<th>7.20</th>
<th>How do consumers define higher animal welfare?</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 mins</td>
<td>How do consumers define higher animal welfare?</td>
</tr>
<tr>
<td></td>
<td>What kinds of ideas,</td>
</tr>
</tbody>
</table>

Introduce the idea of ‘higher animal welfare.’ Bear in mind the language they used to refer to the concept in earlier sections.
### General group discussion

*Earlier on, some of you mentioned things like [x, y, z]. When we talk about animal welfare in relation to food products, what kinds of things spring to mind?*

Write some key words up on the flipchart as they talk. Prompt on the following questions:

- What exactly do we mean by ‘animal welfare’?
  - What do they focus on? Living conditions? Do not prompt.
- Why is it/is it not important?
- How does it make you feel talking and thinking about it?

For our analysis: how does this compare to the ‘official’ definition?

What are the characteristics that people see as being key to animal welfare?

---

### 7.30

#### 6. Exploration of specific existing labelling schemes

*Animal welfare is a complex subject, and there are lots of labels that try and get information across to consumers. Take a look at these slides.*

Show slides of the following different labels.

1. Red tractor meat
2. Freedom food meat/ready meal
3. Free range eggs

How do people react to the different labels? How recognisable, meaningful and trusted are they? What level of detail do people go to?
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Barn eggs</td>
<td>would make them more meaningful/trustworthy?</td>
</tr>
<tr>
<td>5.</td>
<td>A supermarket specific label, e.g. Tesco’s FCCA (tailor to supermarket provision in group location)</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Grass fed beef</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>British milk with picture of the farmer on it</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Farm assured</td>
<td></td>
</tr>
</tbody>
</table>

For each one, discuss the following:

- Recognition – initial reactions, thoughts
- How often do you buy this kind of product? (Find out if these labels are a driver or an incidental bonus)
- What do they mean? **What messages do they put across?**
  - What level of detail do people go to when they aren’t prompted? What do they focus on (e.g. just living conditions, or slaughter practices etc too?)

**General discussion (with slide of all labels in background)**

- Do you trust these labels? Which types of organisation do you think should provide this type of information?
- Whose responsibility is the welfare of animals used for food? Theirs? Farmers’? Government’s?
- Do you think people care about this type of thing? Do they think it’s important? Does it make a difference?
- Personal consequences of buying these products – how does it make them feel?

7.45  7. **What types of label/information might help?**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10 mins</td>
<td><strong>General group discussion:</strong> <em>As we discussed earlier on, many people say they would like to buy higher animal welfare products, but they don’t necessarily translate this into action. What do you think would encourage people to buy</em></td>
<td>To explore what aspects of a label participants</td>
</tr>
<tr>
<td><strong>higher animal welfare products, or buy more of them?</strong></td>
<td>consider most influential, and what types of information are most important.</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>• Do people think more/ better information would help?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Do you think labels make any difference?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• What kind of information do they think would be helpful to people?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Which are the best type of label? Logo/info/traffic light?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• How might this information be presented in other ways apart from labels?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Are there any downsides to this (e.g. time spent reading labels)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>7.55</th>
<th>8. Wind up</th>
</tr>
</thead>
</table>

| 5 mins | Thank and close; distribute payments (make sure all sign sheet) |
## Annex E - Topic guide 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Instructions</th>
<th>Purpose of section</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 mins</td>
<td><strong>Introduction</strong></td>
<td>Warm up.</td>
</tr>
</tbody>
</table>
| 6.15 - 6.20| - Introduce yourself and Brook Lyndhurst  
- Toilets, fire drills, mobile phones  
- Purpose of groups:  
  - To explore why people do and don’t buy certain food, and how different types of food label influence what people decide to buy.  
  - Explain the need for honesty  
  - Healthy debate – no answer is ‘right’ or ‘wrong’, want to understand their views  
  - Will ask that people don’t speak over each other and to allow each other the time to speak  
    - recorder can’t pick up what’s happening if everyone talks at once  
  - Do want to hear about everyone  
  - Confidential, but recorded  
    - voice recording used as back-up  
    - get permission  

Put participants into pairs; give them a couple of minutes to find out and report back the following info about their partner:  
- name  
- their favourite food  
- one other interesting fact  
- where they shop |
### Part 1: Motivations and barriers – the value-action gap #2 (6.20 – 6.45)

<table>
<thead>
<tr>
<th>15 mins</th>
<th>Section 1: Why do you buy and not buy these products?</th>
</tr>
</thead>
</table>
| 6.20 – 6.35 | **Individual exercise (5 mins)**  
As I said, we’re going to be talking this evening about why people do and don’t buy different foods. To start us off, I’d like to get a rough idea of what you think about a few different food-related issues. I’ve got a sheet for each of you to fill in. It has a list of issues and I’ll like each of you to just tick the box to indicate how important that issue is to you in general – the scale is from ‘very important’ to ‘not important at all.’ You’ve just got a minute, so don’t think about it too much, just go with your first instinct.  

- **Scale 1:** How important is this issue to you?  
  Many people, when asked, say that these issues are important and they would like to buy, say, higher animal welfare food. However, this attitude is often not translated into action, and sales of products like these can often be quite low. We’re interested in this gap that seems to appear between what people think is important, and the products they actually end up buying. So I’d like you to turn your papers over and fill in the other side. Don’t worry if your answers are a bit different from question 1 – most people’s are!  

- **Scale 2:** How often does this issue influence your choice of what to buy?  

**General discussion (5-10 mins)**  
As I said, don’t worry if you’ve answered the two questions differently – that’s exactly what we want to talk about [i.e. please don’t change your answers retrospectively].  

Did anyone find anything particularly interesting when you did that exercise? Where were the biggest gaps etc...  

Discussion of how they rated the issues on the different scales. Probe on:  
- What did people think were the most/least important issues? Why?  
- Similarities/differences/links/commonalities between issues on both scales  
  - Why are these issues (un)important? Do they have anything in common?  
- Similarities/differences between scale 1 and scale 2 for individual issues (plus reasons why): were there any that you feel you can put that value into action? Where were the biggest discrepancies/differences? |
| 8.05 – 8.20 | Opening exercise to get animal welfare in context and to get them thinking about a range of issues. Similar to exercise from previous group, for further comparison.  
To look at the relative importance of the different considerations across the groups (and across other ways of cutting the sample, inc SEG)  
To compare the size and nature of the value action gap across the groups.  
Is the value action gap larger for certain issues? Why is this?  
To explore commonalities (e.g. common underlying values?) between different types of ethical’ or ‘responsible’ purchasing. (The first groups suggested that links between A.W and eg environment are at level of values, not specific attributes)  

**Main aims:**  
- Why are issues important/unimportant?  
- Relative size of value-action gap across different issues (and why?)  
- Underlying links between |
Collect in the sheets, making sure everyone has written their name at the top.

**Section 2: Perceptions and understanding of animal welfare**

**Images brainstorm (2 mins)**

We’re particularly interested today in food with higher standards of animal welfare. We’d like to know a bit about the picture people have in their heads of what higher animal welfare means. Just shout out the images that spring to mind of higher animal welfare.

Write up ideas on the flip chart so people have a reference point.

Lead into **group discussion: animal welfare (10 mins)**

- Do you think animal welfare is important? Why/why not?
- Underlying values (i.e. why particular issues are important to people)
- WHY are these considerations high/low priority? (Why are things important to people and how does buying products like this make them feel- laddering down to underlying values and attitudes)
- Any sources of inconsistency/dissonance? (e.g. do people feel that it is inconsistent to buy some and not others?)
- Consistent/ad hoc consideration? Driver or added bonus?
- Social norms – what do they think other people like them do, and how do they feel about it?
- To what extent do people notice/use/understand labels about these issues?
- Interpretation and use of animal welfare labels
- Links and associations between animal welfare and other products, attitudes, values, issues

**Part 2: Exploration of options for labelling and other types of information provision (7.00 – 7.50)**

30 mins

**Section 1: Label/message testing**

**Group brainstorm (2 mins)**

As I said, we’re particularly interested in animal welfare today. Following on from that last exercise, my next question for you is about how we might encourage people to buy higher animal welfare products. If you shout out ideas, I’ll write them up on the chart.

If labelling doesn’t come up, prompt.

Do ideas for how to encourage purchasing or higher animal welfare vary across the groups?

To what extent do different groups think labelling would affect them
Follow up questions

- Would any of these actually make a difference to you, personally?
- Which of these, if any, would be most likely to encourage you to buy higher animal welfare products?

**Label testing**

As we’ve just been discussing, one possible way to encourage people to choose higher animal welfare products might be through new types of labelling on food packaging. I’ve got a few examples of possible labels here that I’d like you to have a look at.

Show group slides of the following (illustrative) labelling options (one slide at a time – may not be time for all in all groups)

**Notes:**

Go through each separate element individually (eg certifying body/flag/words/key terms/general design).

NB – first slide, explain ‘medal’ system (i.e. bronze, silver, gold). What would eg ‘bronze’ animal welfare mean?

For each, discuss the following questions:

- Pros of that approach to labelling
- Cons of that approach to labelling
- What message do you think it conveys?
  - For those with different levels, how do you interpret each level (e.g. what might ‘bronze’ animal welfare mean)?
- How much do you trust it? What is at the root of scepticism?
- How could it be made better? What types of additional information would you like to see?
- What level of detail seems right?
- Perceptions of quality
  - Re animal welfare – is it the A.W. label per se or the fact it’s ‘premium’/British/ ... ?
  - The influence of habit/convenience/time pressures

**Section 2: Wider information provision**

*What other types of information (as well as or instead of labelling) do you think might be effective in encouraging people to choose higher animal welfare products? What do you think might encourage...*
9.00 – 9.20  
**people to buy your higher animal welfare products?**

**Small group exercise (5 mins)**
Split group into three and give each group a specific product (chicken, beef, milk). Ask them to spend 5 minutes thinking about some of the ways they might communicate with people about the higher animal welfare status of their product.

**Group brainstorm (10 mins)**
Ask each group to give a quick summary of their main ideas.

If they don’t come up, prompt on:
- TV programmes
- In-store campaigns/information provision
- **Info provision for online shopping (Request from Emma)**
- Adverts (on TV, radio, public transport, billboards, bus stops)
- Websites
- Campaigns by different organisations
- Celebrity endorsements

Write key ideas up on the flip chart and use this as a basis for a group discussion.
For each one, discuss:
- the details of how it would work
- why people think it would be effective
- which audiences it would affect most

**Negative vs positive messaging (3 negative and 3 positive images, show in a random order) (5 mins)**

Show the group each image. Ask them to call out how the image makes them feel/what springs to mind.

Discussion: which images would encourage people to buy higher animal welfare products? Do they think positive or ‘negative’ (NB our images are just realistic) effect which types of people most?

**Overall, which (combination of information) do they think would most effective to encourage other people? Does this apply to them personally too?**

**Final thoughts**

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improve the efficacy of labels?  
(First round suggested that information in addition to labels may be necessary, in order to get people to notice the label in the first place and for general awareness raising. A.W. currently relatively invisible at point of purchase)
**Does anyone have any final thoughts about animal welfare labelling?**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 mins</td>
<td><strong>Self completion of defra segmentation questionnaire</strong></td>
</tr>
<tr>
<td>7.35 - 7.40</td>
<td>Make sure you collect them in and that each one has a name on it.</td>
</tr>
<tr>
<td>9.20 – 9.25</td>
<td></td>
</tr>
<tr>
<td>7.45</td>
<td><strong>Thank and close – get all to sign incentive sign-off sheet</strong></td>
</tr>
<tr>
<td>9.30</td>
<td></td>
</tr>
</tbody>
</table>
Annex F - Results of the sorting exercise

Method

Multiple sorting procedure

During each of the first round focus groups, participants were split into pairs and invited to perform a sorting exercise. The aim of this exercise was to explore the associations that participants made between animal welfare and other values-based product attributes (see table 10).

The sorting exercise was designed in accordance with a technique known as the multiple sorting procedure. The multiple sorting procedure is a qualitative methodology rooted in psychological theory. It requires participants to sort a set of elements (in this case values-based product attributes) into different categories. This allows participants to generate their own classification systems for the attributes, rather than constraining responses according to constructs\textsuperscript{35} prescribed by the researcher.

“...the conceptual framework of constructs and the categories on which the respondent draws are...the starting point for understanding the respondent’s action in the world.”

(Canter, 1985)

The multiple sorting procedure and multidimensional scalogram analysis are tolerant of small sample sizes – around 8-10 people are sufficient for the tool to reveal underlying patterns in the categories and concepts people use to understand a given subject.

Multidimensional scalogram analysis

Data collected in the sorting exercises were analysed using multidimensional scalogram analysis\textsuperscript{36,37} (Lingoes, 1968), which produces visual representations of the patterns emerging from the sorts of the whole group in the form of scatter plots. In the plots, each product attribute is represented as a point in geometric space. The distance between points represents the strength of association between different attributes: the closer the points are on the plot, the more similar they were judged to be by participants; and the further away they are, the more dissimilar they were perceived to be.

Multidimensional scalogram analysis is a non-metric scaling technique, with the plot representing the universe of attributes assigned to the attributes – the axes are not numeric and the relationship of points to axes is not meaningful. In order to interpret the plot, it is

\textsuperscript{35} The word \textit{construct} is used in psychology to describe the concepts, ideas and language that people use to mentally construct and understand the world. Kelly (1955) states: "Man looks at his world through transparent templates which he creates and then attempts to fit over the realities of which the world is composed. (pp.8-9) Constructs are used for predictions of things to come, and the world keeps on rolling on and revealing these predictions to be either correct or misleading. This fact provides the basis for the revision of constructs and, eventually, of whole construct systems. (p.14)" In the case of this research, the word ‘construct’ refers to the category descriptions used by participants.

\textsuperscript{36} Analysis was undertaken using the ‘Multiple Scalogram Analysis’ feature of the Psychometric Scaling Package software developed by Dr. Sean Hammond at Broadmoor hospital.

\textsuperscript{37} Both two- and three-dimensional analyses were performed on the data. The differences between the outputs were very minor, so it was decided that a two-dimensional analysis was sufficient.
necessary to return to the qualitative data collected during the focus groups: it is this that provides insight into why product attributes were classified as similar or different.

Participants’ awareness of research topic at time of sorting exercise

Participants in the focus groups were asked to do the multiple sorting exercise before they knew that there was a particular interest in animal welfare. Animal welfare had at that stage only been mentioned in the context of food product attributes in general, and had not yet been singled out as more relevant than any other characteristic. The group had not yet been given the opportunity for in-depth discussions, so the sorting exercise represented their spontaneous categorisations.

Sort cards

Each pair of participants was issued with an identical set of 13 cards, with product attributes alongside representative images. The images were selected to be as neutral as possible so as not to imply inherently positive or negative associations with particular attributes. The cards can be seen below in Table 10.
<table>
<thead>
<tr>
<th>Locally produced</th>
<th>Fair trade</th>
<th>Animal welfare</th>
<th>British</th>
<th>Rainforest Alliance Certified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country of origin</td>
<td>Packaging</td>
<td>Free range</td>
<td>Food miles</td>
<td></td>
</tr>
<tr>
<td>Healthy eating</td>
<td>Corn fed</td>
<td>Carbon footprint</td>
<td>Organic</td>
<td></td>
</tr>
</tbody>
</table>
The first stage of the exercise involved free sorts – that is, each pair was invited to sort the cards into categories of their own choosing, based on whatever criteria they wished to apply. Participants were instructed that each group should contain attributes that were similar to each other in some important way - the basis of this similarity judgement was left up to them. Participants could sort the cards into as many groups as they chose and each group could have as many cards in it as they liked. Participants were assured at the beginning of each sort that there were no right or wrong answers, but it was their views that counted.

Subsequently a second free sort was carried out by most pairs in order to enable comparison between the more spontaneous first categorisations and a more considered second set.

Results
Content analysis

The average number of categories per free sort was 4. Between them, 20 pairs of participants conducted 34 free sorts, giving rise to a total of 136 different categories of attributes.

In order to develop a typology of the constructs (category descriptions) generated by participants, the sort data were independently content analysed by two analysts.38

Table 11 below shows the types of category descriptions (or ‘constructs’) generated by participants during the free sorts, along with the frequencies. It should be noted that three of the sort cards showed an environmental term, whereas there was roughly one card each for the other categories in the list below. Thus the frequency of the ‘Environment’ construct may be misleading. The constructs which follow provide an insight into the way that participants grouped product attributes, and what characteristics are most prominent in their world view.

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38 In order to minimise observer bias in the generation of generic category types, two analysts examined the categories generated by participants. The first made a list of generic category description types (for example, the category descriptions ‘Good for you’ and ‘Healthy’ would both be grouped under ‘Health’. The second independently reclassified the data according to this list. Any disagreements were discussed until agreement was reached. This method of content analysis is discussed in Wilson and Mackenzie, 2000. Calculated using the joint-probability of agreement, which the literature suggests is a simple and acceptable method for nominal data, we achieved an inter-rater reliability of 0.82 for this exercise. This measure is a representation of the validity of the analysis.
<table>
<thead>
<tr>
<th>Constructs</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>21</td>
</tr>
<tr>
<td>Health</td>
<td>19</td>
</tr>
<tr>
<td>No name given</td>
<td>15</td>
</tr>
<tr>
<td>Origin</td>
<td>14</td>
</tr>
<tr>
<td>Animal welfare</td>
<td>13</td>
</tr>
<tr>
<td>International development concerns</td>
<td>10</td>
</tr>
<tr>
<td>Locally produced</td>
<td>8</td>
</tr>
<tr>
<td>Ethically positive</td>
<td>6</td>
</tr>
<tr>
<td>Waste</td>
<td>6</td>
</tr>
<tr>
<td>British</td>
<td>4</td>
</tr>
<tr>
<td>Food miles</td>
<td>4</td>
</tr>
<tr>
<td>Food quality</td>
<td>4</td>
</tr>
<tr>
<td>Not categorised</td>
<td>3</td>
</tr>
<tr>
<td>Organisations/initiatives</td>
<td>3</td>
</tr>
<tr>
<td>Aesthetics</td>
<td>1</td>
</tr>
<tr>
<td>Chickens</td>
<td>1</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>1</td>
</tr>
<tr>
<td>Negative aspects</td>
<td>1</td>
</tr>
<tr>
<td>Price</td>
<td>1</td>
</tr>
<tr>
<td>Unconcerned</td>
<td>1</td>
</tr>
</tbody>
</table>

**Multidimensional scalogram analysis**

As discussed above, the multidimensional scalogram gives us a graphical representation of the conceptual landscape inhabited by the food product attributes suggested to the focus group participants by the sort cards. The closer attributes appear to one another on the plot, the stronger the association between them. Figure 13 shows the combined results from all 34 sorts made by the 4 groups.
The attributes are all labelled, and the generic categories, or constructs, shown in Table 11 have been superimposed, along with notional boundaries which have been placed according to the most common reasons why participants grouped attributes together. As with all following plots, a dotted line indicates a weaker division.

**Overall results**

The multidimensional scalograms provide supporting evidence for trends identified elsewhere during the project. Figure 1 clearly shows how closely ‘Corn fed’, ‘Free range’, ‘Animal welfare’, ‘Healthy eating’ and ‘Organic’ are associated with each other, as well as how distinct they are seen to be from all of the other attributes in the sort card set. This pattern consistently emerges throughout the exercise regardless of the sorts selected.

It is also possible to draw a minor distinction between a ‘Corn fed’, ‘Free range’ and ‘Animal welfare’ group (which can be loosely termed ‘Animal welfare’) and a ‘Healthy eating’ and ‘Organic’ group (generally together under ‘Health’). However, this is neither as strong an association as the more general grouping between all five attributes, nor as the distinction between these and all other categories.
The link between health and animal welfare found throughout the primary research is further reinforced by the evidence in the plots. The evidence from the sorting exercise demonstrates that the link to health is a top of mind, spontaneous response for many people, as well as an association that is drawn at a more reasoned level. Although its association with health dominated the categorisations of animal welfare, it is interesting to note that several pairs named the group containing animal welfare ‘Ideal world’, ‘Good ethics’ or ‘Like’.

The consistency of grouping in the graphs indicates that participants had a fairly coherent view of the attributes as well as the categories into which they could be placed. It is clear that environmental concerns are regarded as entirely distinct from health, animal welfare and organic matters. This is a common thread through all groups and for all scalogram plots. Similarly, ‘Locally produced’ and ‘British’ invariably appeared together. Interestingly, this latter group was generally seen as distinct from ‘Country of origin’ and ‘Food miles’, which also mainly appeared together.

Of incidental note is the close association between ‘Organic’ and ‘Healthy eating’, which provides further evidence about the importance of perceived health benefits resulting from eating organic food.

**Differences between first and second sorts**

One strength of the scalogram analysis is that it is possible to compare plots for a variety of selected groups. It is therefore possible to determine whether there are any revealing variations between, for example, participant background characteristics and group locations.

First of all, Figures 14 and 15 show a comparison between the results from the first sorts and the second sorts of all participants. The first sorts performed by participants represent their most spontaneous categorisations, shown in Figure 14 overleaf. To perform second sorts, shown in Figure 3, participants often had to think more deeply about their categorisations.
Figure 14 – Multiple scalogram plot – all groups, first sorting exercise only

Figure 15 – Multiple scalogram plot – all groups, second sorting exercise only
A comparison between the first and second sorts, shown in Figures 14 and 15, can give us insight into the drivers of the sorting process. A second sort implies deeper thought and an attempt to go beyond the more obvious association.

The most notable difference between the first and second sorts is that the very close pair of ‘Healthy eating’ and ‘Organic’ in the ‘Health’ group join the ‘Animal welfare’ group, comprising ‘Corn fed’, ‘Free range’ and ‘Animal welfare’. This may suggest that when more thought is given to the matter it becomes harder for participants to separate the health and animal welfare issues in any meaningful way.

‘Locally produced’ and ‘British’ become marginally closer to the ‘Animal welfare’/‘Health’ group during the second sort, but are still distinct. The overall pattern stays broadly the same, with ‘Environment’ at the other side of the plot to ‘Animal welfare’/‘health’, indicating that this particular distinction is stable.

**Comparisons between groups**

Due to the small number of participants involved, findings from the comparison of specific groups are indicative only, and further research would be required to test these observations. However, some of these indicative points of interest are outlined below.

With regard to the conceptual location of ‘Locally purchased’ and ‘British’ attributes, it is interesting to note important differences in the associations perceived by different groups.

Comparison of the two groups comprising urban Positive Greens and rural Concerned Consumers shows a stark contrast in the associations between the organic/animal...
welfare/health cluster and the locally produced/British cluster. The urban Positive Greens perceived the two clusters as distinct, with locally produced and British being much more strongly associated with environmental issues. In contrast, the rural Concerned Consumers strongly associated locally produced/British with organic/healthy food.

Figures 16 and 17 overleaf show the plots of the two groups’ sorts. It is interesting to note that these plots are dominated by the ‘health’ and ‘environment’ constructs. It is possible to construe these as ‘benefits for me/private goods’ and ‘benefits for others/public goods’ respectively. Given the closer connection of rural residents to food production (see section 2.4), it is possible to speculate that the attributes of locally produced/British are more strongly associated with personal benefit for rural residents. Further research would be needed to explore this suggestion.
Figure 16 – Multiple scalogram plot – Group 1, Urban Positive Greens, all sorts

Figure 17 – Multiple scalogram plot – Group 4, rural Concerned Consumers, all sorts
Summary

Multidimensional scalogram analysis provides a visual representation of the associations drawn by participants between values-based product attributes. The scalogram plots strengthen the evidence gathered in the project for a **close conceptual association by all participants of animal welfare and their own (human) health**. It is also clear from this analysis that **environmental concerns in general are distinct from health and welfare concerns** in general in the minds of the focus group participants. Figure 1 clearly illustrates these trends.

A comparison between the first and second free sorts reveals a closing of the gap between the ‘Healthy eating’ and ‘Organic’ cluster and the ‘Corn fed’, ‘Free range’ and ‘Animal welfare’ cluster, demonstrating an association between these attributes which becomes stronger after further consideration.

The ‘Locally produced’ and ‘British’ product attributes were seen very differently by urban Positive Greens and rural Concerned Consumers. For the former, **local/British food is associated with environmental issues** and is separate from the health/animal welfare cluster. For the latter, **local/British food was strongly associated with the health cluster**, and much closer to animal welfare.
Annex G - Exploratory analysis of questionnaire results

A table of correlation values between and within the importance and influence ratings of the round 2 questionnaire results (n=26 – see section 2.1) are shown below in table 12, with the correlation coefficients colour-coded by strength. This exercise was designed to explore with participants the extent to which they perceived that their attitudes towards what is important influenced their decision making.

While not all the relationships are strongly correlated, there appear to be overlapping groups of factors which are somewhat correlated. Much more work would need to be done with a much larger and representative sample to draw out any clearer picture. However, it is interesting to draw out the patterns in how participants answered this ‘survey-type’ exercise, before they were primed to the issue of animal welfare. For example:

- The strongest correlation between reported importance of an issue and reported influence of that issue on purchasing decisions was for free range. In other words, participants reported finding it relatively easy to translate their attitudes on the importance of buying free range into action at the supermarket.
- The weakest correlations between the ‘importance’ and ‘influence’ questions were found for fair trade and local products. This suggests that participants found it hardest to match their attitudes with action on these two issues.
Are labels the answer? Barriers to purchasing higher welfare products

<table>
<thead>
<tr>
<th>Importance</th>
<th>Fair Trade</th>
<th>British</th>
<th>Carbon</th>
<th>Animal Welfare</th>
<th>Organic</th>
<th>Health</th>
<th>Free Range</th>
<th>Local</th>
<th>Packaging</th>
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</thead>
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<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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</tr>
<tr>
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<td>Health</td>
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<th>Carbon</th>
<th>Animal Welfare</th>
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<th>Health</th>
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<td>0.06</td>
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<td>0.38</td>
<td>0.45</td>
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Legend:
- Very strong 0.8 < r < 1.00
- Strong 0.6 < r < 0.8
- Weak 0.4 < r < 0.6
- Very weak r < 0.4
Annex H - Overview of the stakeholder workshop

Are labels the answer?
Animal Welfare Labelling Workshop
27 April 2010

Event report
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Version number: 1.1
Date: 25 June 2010

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- Introduction
- Overview of issues arising
- Overview of options
- Flipchart notes: issues arising
- Flipchart notes: options

Introduction
This report provides a summary of the main sessions conducted during the Animal Welfare Labelling Workshop held at the Defra Innovation Centre on 27th April 2010. It contains a summary overview, followed by more detailed bullet points of the issues and views emerging on the day.

The workshop was facilitated by Tony Mobbs from the Defra Innovation centre facilitation team.

Attendees
Representatives of the policy, retail, NGO, producer, supplier, food service and consumer sectors were invited to attend the workshop. The attendees were:

- Jon Fletcher, Brook Lyndhurst
- Robert Newbery, NFU
- Mike Varley, BPEX
- Giles Clifton, British Egg Industry
- Peter Bradnock, British Poultry Council
- Chris Lamb, BPEX
- Phillip Wilkinson, H2S
- David Fell, Brook Lyndhurst
- Peter Wight, M&S
- Lauren Orme, M&S
- Kate Millar, Tesco
- Andrew Nicholson, Co-operative
- Ann Davison, Defra
- Sara Jayne Stanes, Academy of Culinary Arts
- Stella Nicholas, NCF
- Hilary Burrage, Defra
- Kurt Muehmel, Bio Intelligence Services

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Workshop Objectives

The main objectives of the workshop were to:

- Inform stakeholders of the current evidence and assess whether economic markets function effectively and transparently allowing consumers to make informed choices based on animal welfare standards
- Explore different perspectives on whether there is untapped demand for higher animal welfare products
- Explore existing and potential means of providing consumers with sufficient information to allow them to make informed choices

Event Agenda

- Welcome to the Innovation Centre
- Introductions
- Objectives of the Workshop
- Scene Setting
- Background To the Workshop
- Breakout Session 1 – Issues arising
- Breakout Session 2 – Option generation
- Plenary Feedback
- Open Discussion
- Next steps
Workshop overview: the current state of play in the market for higher animal welfare products

A number of key themes emerged during the first part of the workshop, the objective of which was to explore different sectors’ perspectives on the current state of play with regard to the market for higher welfare products.

Defining ‘higher welfare’

There was consensus across stakeholders that there is a need for a common definition of what ‘higher animal welfare’ means. Most consumers expect ‘good’ standards of welfare anyway, without having to pay extra or select a ‘higher’ welfare product. Indeed, many stakeholders felt that existing welfare standards are excellent, and more information about these should be communicated to consumers.

Measuring welfare outcomes across production systems

There was also consensus that there is a requirement for a system of measuring welfare outcomes that can be used consistently across production systems.

Potential for consumer/market led approach

There was disagreement in the room around the scope for consumer led change. While some stakeholders thought the market is the best mechanism for translating consumer values into action, others thought that this approach is limited, and there is a larger role for government. An example of this role would be legislating against the import of standards of welfare that are lower than UK standards (a key barrier here is WTO trade rules).

Consumer awareness and interest in animal welfare

Most stakeholders agreed that consumer food purchasing behaviours are highly complex and multifaceted. Most stakeholders agreed that there is a niche market for higher welfare products, but awareness of the issue is low among most consumers.

Education on animal welfare

There was broad consensus that if demand for higher welfare products is to be activated, wider education is needed to make consumers more aware of the issue. This was qualified by some stakeholders, however, who questioned the need for ‘higher’ welfare standards.

Labelling on its own is limited in scope

There was consensus that labelling on its own is insufficient to generate the awareness among consumers that is a pre-requisite for increasing the market for higher welfare products.

Any label must be simple and clear

Stakeholders recognised the competing pressures on consumers while food shopping, and agreed that any form of information provision around welfare standards must be as clear and simple as possible.
Links to quality, health and so on could provide a ‘vehicle’ for communicating information about welfare standards to consumers

The associations drawn by consumers between higher welfare standards and a higher quality product may provide an ‘opening’ for providing information about welfare standards to consumers. Retailers already have in place systems for differentiating between different ‘brand values’.

Social norms

Various stakeholders agreed that changing social expectations around purchasing higher welfare products, and tapping into mechanisms of ‘peer pressure’, would be likely to ‘tip the balance’ and increase the market for higher welfare products.

Workshop overview: options for ensuring that economic markets function transparently and allow consumers to make informed choices

The following themes emerged from the second part of the workshop, the objective of which was to explore options for ensuring that economic markets function effectively and transparently and allow consumers to make informed choices.

The assumptions behind the ‘need to ensure that economic markets function effectively’

Some stakeholders disagreed with the premise of the question, since they asserted that economic markets already do function as well as they can do in the context of the nature of consumer demand for animal products. However, many agreed that there is a need to improve the way in which information about welfare standards is communicated to consumers. Below is a summary of the options generated during breakout session 2; the detailed outputs of each group are later in this section.

Summary of Options from all groups

**General communications**

- General education in food and farming to ensure sustained change
- Consistent communication is required to complement and draw attention to labelling

**Labelling**

- Logo (not EU)
- Production systems
- Other info – welfare criteria
- Origin (link to welfare?)
- Use the “egg model”
  - Small steps
  - Different species
- Graded scheme cf energy
Defining animal welfare

- Welfare framework – assurance schemes based on consistent definitions of ‘higher’ welfare
  - Transparency in the market
  - Independent authority
  - Labelling by outcome
  - Trusted Logo
  - “Simple” label
  - Commonality between retailer standards

Other forms of information provision to raise awareness about animal welfare

- Public Sector to take lead through procurement schemes
- Celebrity Chefs
- TV Channel
- Cartoons
- Comparison websites - Comparewelfare.com
- Independent audits
- CSR schemes
- Choice editing by supermarkets
- Bar coding and mobile phone apps
- Promotion of brands
- Dissemination of information in all formats and media

Supply chain measures

- CAP Funding tied to increased welfare standards
- Take off Pricing
- Name and Shame

Breakout session 1 – Issues arising

The following sections present a record of the flip chart notes generated by delegates on the day.

Group Questions

- What do you think are the key issues arising from this morning’s presentations? From your experiences, what do you agree or disagree with from the presentations?

- What scope is there to increase further the market for higher animal welfare products? What are the key motivators and barriers to consumers buying higher animal welfare products?

- If there is scope for increasing further the market for higher animal welfare products, what role could labelling play in enabling consumers to translate their attitudes into purchasing choices?
Table A (Industry)

(a) Key Issues

- Purchasing choice is multi-factorial, not single issue
- Role of Government
  - Enable informed choice not to influence that choice
  - Sponsor UK industry and its standards
- Labelling product too blunt
  - Range of communication channels needed
- Verifiers of standard must be independent of all interests
- Is Red Tractor the answer?
- Consumer misconceptions on higher welfare equates to higher safety and better nutrition
- Should Government be influencing choice or just clearing barriers to information to consumers own choice
- Is there a market? What Size?
- High standards already in place and will evolve
- Welfare purchases are actually linked to health choices linked to lifestyle choices not welfare per se
- Red Tractor is multi-dimensional
- Mustn’t export issue by unilaterally raising UK standards vs. EC
- What is the view on red tractor (lion eggs)? Is it enough?
- Welfare charities are a vested interest
- C.F. Volvo and safety – is all food now safe / high welfare – what, if any, further options are there?
- Disconnect between welfare outcome and system of production
- Labelling too blunt – must use other communications e.g. web, barcode app, “Charter”
- Labelling is blunt – communication is key

(b) Motivators and Barriers

- Lack of consumer awareness of what labelling and animal welfare / safety for humans is already put on food products
- Like that consumers want robust legal standards – new rules for meat and eggs now being implemented
- Consumers may have sufficient information to be content with decision
- Classic marketing issue – what is potential market vs. investment required
- Consumers may actually be happy with welfare standard and choice made. We have to accept this

(c) Role of Labelling

- Yes – Provision of commonly understood info and labelling

Table B (Retailers)

(d) Key Issues

- Welfare labels could turn customers off
- High price
- Reminded it’s an animal
- Question other labels

- Research confirmed retailers understanding on the issue
- Need to take holistic approach
- Holistic approach
- Education is critical – make decision before going shopping
- Need to link welfare to other sustainability and brand values
- Time spent at fixture
- Labelling not a magic wand
- People expect “good” standards anyway
- Where leads us on other areas? Wool? Leather?
- What you have on pack – need to consider
- Should government lead by example in public procurement

(e) **Motivators and Barriers**

- Competition amongst retailers will drive change
- Brand trust
- Role of competition
- Legislators must stop imports of lower welfare products
- Clarity of message
- The market will determine and drive higher welfare standards – not government
- “Flat playing field” – legislation

(f) **Role of Labelling**

- Too many labels – get rid of most – reduce confusion

Table C (Consumers)

(g) **Key Issues**

- Lack of awareness / apathy
- Price major purchasing factor
- Don’t read labels
- Faith in British
- Welfare friendly animals should be the norm
- Peer pressure
- Good marketing for supermarkets / CSR
- Education
- TV
- Increase concerned consumer
- segment
- The plate – moral satisfaction – good selling / marketing for supermarkets
- Consumers need to be educated from childhood i.e. 5yrs upwards
- Consumers don’t read labels, consumers have faith in British
- Lack of awareness / apathy: towards AW price plays major trigger
- Link with quality very important? Can food industry do more?
- Understanding the markets
Recognise that ideas change and segment over time – especially if overtly discussed
Realise that consumers are a varied population – gender, age and much else. (some consumers buy for others, some just for themselves)
We are only at the beginning of this ‘journey’. The debate will intensify / increase with issues around food security as population increases climate change....
Higher awareness and purchases of free range poultry and eggs
Is leather (and glue....etc) part of the thinking? And should it be?
Look to the future: things (culture, economy, technology, society) change rapidly. Are we ready? Anticipate
Celebrities and TV coverage – maintained
Technology will ease / remove many issues e.g. male cattle / chicken etc. quite soon; then the market will adjust
Trusted intermediaries – consumer orgs and consumer reps
Farm to plate what is animal welfare 10%
Re: plant products .... what are the inter-connections with animal welfare, and vice-versa? Food production is complex!
Abattoirs
Fairtrade is an issue as well as organic , other sourcing. These are labels of quality. We need to understand!
Associate high AW with special purchase (e.g. Sunday Roast)
Buying food is a very complicated process

(h) Key Agreements
- Price is key
- Not enough general AW awareness, I agree
- Agree not top of mind? Is how to increase number of concerned consumers
- Agree that AW becomes less important whilst shopping

(i) Key Disagreements
- 10% higher welfare – why has the sales of free range gone up considerably in past 10 years??
- Problem with surveys: participants give answers they think they should give not what they do

(j) Motivators and Barriers
- Cost, issues, policing, labelling confused
- Better welfare – happy animals = eating experience on
- Why does Defra think animal welfare (beyond Health and Safety) is important! (it is, but the reasoning and public case is opaque)
- Consumer effect and respond to culture change – inc. More knowledge and discussion of the issues
- Most people don’t know how to use veggie products other than potatoes and carrots and peas!
- Meat and two veg is the expectation because after WW2 that was providing well for families
• Peer pressure / habit / culture
• Availability
• Price
• Tie into supermarkets quality and ethical offer
• Genuine concern for AW
• Promotion in supermarkets to demonstrate better flavour
• Be careful of making decisions for low income consumers
• Can save cost by eating less meat
• Address price premium
• Copy success of free range eggs
• Market research: can we buy more veg etc. and then buy (afford) only good – maybe more expensive – animal products
• Clarity about the AW of all products
• As the research says motivator = peer pressure
• Key motivators: higher input from TV Programmes, Media, Celebrities etc.
• Parents, teachers – children
• Chefs: Butchers

(k) Role of Labelling

• Clearer point of sale info. Too many different labels cause confusion
• Labelling informs the debate – and will crystallise positions
• Labelling a prompt seal the deal but mostly decided elsewhere
• Soon we shall use barcodes which will enable us to ‘read’ them for nutrition, animal welfare, source, carbon, water
• Whole proposition is important not just label
• Labels need to come alongside education and general awareness raising
• Label delivers to public expectations
• Labelling must fit with the other environmental etc propositions
• Degree of focus: ‘good’ farming ↔ organic. Fairtrade ↔ full accredited etc. Do people understand these spectra?
• I like the e.g. Tesco way of promoting healthy cooking – leaflets for purchases etc! Superstores can lead
• Descriptors of attributes (neutral)

Table D (Welfare organisations)

(l) Key Issues

• Awareness and education – labelling not enough, part of package – sustained communication
• Simple, immediate labelling
• Importance of TV, media
• 1 in 10 still significant majority – pull through – tip balance
• Labels not work on own. Ongoing repeated education on pack and point of sale
• Is it about “exposing the lower end of welfare”? – Transparency
• Pull – through – people who are more concerned – influence them and tip the balance, will bring people through with them
• How to inform in the house, remind in store?
• Who people trust to administer a label / verify

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• People need reminding this is important. At home – reach through TV
• Awareness of different standards that are available...
• Considerations must be balanced across systems / brands
• Info need to be made easily available and simple
• What about other tools along with a label are needed

(m) Key Agreements

• 1 in 10 for me is a significant statistic – leading the way
• Start with 1 in 10 – 1 in 10 is significant

(n) Key Disagreements

• Good insight from presentations of examples, label alone not sufficient but education needed at various points

(o) Scope

• TV, media – rise in higher welfare products might have gone down
• Significant scope for getting people buying higher welfare, not withstanding people at the bottom. Has to be done in collaboration with producers for supply – co-ordinate
• Large untapped demand in the middle
• Increase consumer awareness – large no of people not engaged. Few “wilfully ignorant”
• What scope is there for change using a consumer / market based approach
• TV and Celebs to play a role, internet, you tube?

(p) Motivators and Barriers

• Lack of awareness
• Price – sliding scale, don’t V to go free range
• Price is a key barrier but so is sufficient information
• Schools – citizenship, part of curriculum. Farm visits /inner city schools
• External barriers especially availability
• People believe in the legislation / standards
• Awareness / care about farm animal welfare

(q) Role of Labelling

• Open and transparent across all product systems
• Benefit all stakeholders (producers, retail, consumers)
• Mandatory labelling – real changes – case study of eggs
• Imports – don’t know what their standards
• Any label needs to be simple and immediate
• Labelling – might enable consumer to make informed decision – broader education pros.
• Increase the % of voluntary labelling.
• Clear, simple labelling system
• Eggs – case study – mandatory labelling has made a difference
• Labelling is necessary to enable consumers to make informed decision
- Need education as well as label at point of sale
- Information to supplement labelling is necessary
- Clear, clarity, credibility
- Labelling should be mandatory → transparency in standards

Table E (Policy)

(r) Key Issues
- FSA – research
- Price, quality, health

(s) Key Agreements
- Not surprised by what was presented
- Impressed by standard of research outcomes

(t) Key Disagreements
- Concerns about measuring animal welfare
- Production systems i.e. outdoor not always ensure higher welfare

(u) Scope
- Yes / maybe?

(v) Motivators and Barriers
- Origin of product
- Trust of label
- Difficult to enforce

(w) Role of Labelling
- Clear, clarity of assurance schemes
- Is there a need for a welfare label?

Table F (Policy)

(x) Key Issues
- What is the role of government
- Large difference between FAWC view and view of consumers
- FAWC believes welfare labelling could drive change but consumer views found that only a niche core would act
- Trade off between welfare attributes
- FAWC vs. BL? – labelling to drive change, demand is very small
- Hold the ring – education, validation – standards and application, research
- Free range eggs all meet freedom food standards, but get no benefits unless actually signed up
- 30% increase in freedom food range. Also in supermarkets higher welfare?
• Media – spike in welfare market post – HFW maintained in supermarket product ranges

(y) Scope

• Limited scope for higher market for welfare per se. Bigger scope for higher quality product package including animal welfare

(z) Motivators and Barriers

• External – price – habit
• Internal- guilt – detachment – emotional
• Emotional (makes people disassociate) vs. rational (facts)?
• Cognitive dissonance
• Mark up on welfare products higher than standard. Consumers are the barrier
• Supermarkets driving down welfare standards

(aa) Role of Labelling

• Niche market change warrants labelling system
• Labelling needs to provide assurance that the higher welfare claim is valid

Table G (Mixed group)

(b) Key Issues

• % AW + ≈ 10%
• Link to other attributes
• Research worthwhile

Price / market

• Price premium – good welfare improvement
• Let the market decide
• Is the market functioning effectively

Complexity

• Who decides what is high welfare – industry – retailers – NGO’s

Research Issues

• Sample size
• Other research methods needed to further explore the issues

Attributes

• Ranking welfare with other “concerns“ meaningful?
• Higher welfare = minority issue, high accept welfare. Majority = Quality
• AW not a primary factor in consumer choice
• Cannot generalise about the consumers
• Choice
• Preferences for AW are well hidden
• Welfare as a ‘linked attribute’ with quality, health, environment, nutrition etc.
• Welfare is a quality attribute
(cc) Scope

- Government provide AW ‘floor’
- Increasing AW – who look to? Independent

(dd) Motivators and Barriers

- Education – ability to influence
- Connect (replication between products) labelling?
- Link to other attributes (how much) – buy into proposition
- Economic incentives to promote (premium – sustainable?)
- Complexity of welfare and communication – slaughter rear trans
- Market will decide – perf. Inf.
- Consumer awareness and education
- Promote engagement with agriculture from early age
- Education, Education
- Demand Driven by need, need driven by knowledge
- Promotion
- Communicate good practice in GB Agriculture
- Key Barrier = disinterest from 90% of consumers

(ee) Role of Labelling

- Cons – not need to know what higher welfare means
- No label needed for min – negative?
- Labelling not just a label but other forms of communication
- Any labelling must be easily recognisable
- Barriers – lack of information

Breakout session 2 – Option generation

Each group in this breakout session included a mixture of representatives of different sectors. The aim of the session was to explore a range of solutions for ensuring that economic markets function effectively and transparently allowing customers to make informed choices based on animal welfare standards. The bullet points below are drawn from flipchart notes generated on the day.

Problem Statement

- How might we ensure economic markets function effectively and transparently allowing customers to make informed choices based on animal welfare standards?

(ff) Group Questions

- What options, including labelling, are available to help us achieve the animal welfare strategy goal?

- For each option:
  - How practical is the option?
• Who would be responsible for implementation?
• Who will support it?
• How effective will it be?
• What are the barriers to adoption?

Group 1

(gg) Issues Arising

• Public sector take the lead
• Information education / Media / Labelling
• Labelling
• Research – how to describe good welfare – how to achieve better welfare
• Claims on higher welfare – meaningfulness
• Are we doing enough enforcement?
• Is AW a Priority for tax payers
• Education
• Public sector procurement
• Marketing
• Media
• Food service sector
• Labelling Info
• Education in Agriculture
• Trust in food suppliers
• Information has to be accurate but understandable
• Clears definition of production system terminology
• Government has responsibility to validate claims in market
• Need to substantiate claims already
• Accurate and honest information
• Product differentiation and validation
• Moral imperative to raise welfare standards
• Government objective “improvement of the welfare of kept animals”
• Is 10% animal welfare interest enough?
• Is the market already efficient?
• Who has responsibility to shift consumer perception, moral imperative
• Is the market functioning effectively already
• Public sector giving a lead

(hh) Solution Option: public sector take lead

Practicality

• Difficult - costly

Responsibility

• Government

Support

• Taxpayer? Contractors
Effectiveness

- Potentially high

Barriers

- Cost: Take up

(ii) Solution Option: Information education / media / labelling

Practicality

- Must be sustained (HFW)

Responsibility

- Wide Ranging

Effectiveness

- High potentially (residual apathy)

Barriers

- Cost to consumers: conflicting issues: cost recovery by industry

(jj) Solution Option: Labelling

Practicality

- Lots of not packed food

Effectiveness

- Logo
- Production system – clear definition – does it reflect welfare
- Other info

Barriers

- No especially EU

(kk) Solution Option: Research

Practicality

- Challenging

Responsibility

- Government to sponsor?
Group 2

(II) Solution Option: Name and shame retailers/food service operators

Effectiveness

- reward retailers
- league table

(mm) Other Solution Options:

- An experiment – no information on price and see what happens
- Independent set “high welfare standard”
- Transparent equivalent standards – independent audit – regulated definitions – surveillance – enforcement
- Education – know what label means – food and farming - citizenships syllabus
- Education – know what current assurance schemes in terms of AW
- Public procurement scheme – government setting example
- Welfare framework for existing schemes – government
- Cap funding - tie in with AW e.g. Scotland
  - Pillar 2 subsidy for AW – drive effectively - farmers
- Subsidised farm vet visits
  - AW planning – herd health plan
- Animal Welfare Tzar - turning celebrity chefs to work with government

(nn) Solution Option: Labelling

Practicality

- honest accurate labelling

Responsibility

- market forces

Effectiveness

- how to define high welfare
- Uniform standards applied to domestic products and imports

Barriers

- Retail industry / assurance schemes
- Imports
Group 3

(oo) Issues Arising

- Assumption that market not functioning and that welfare ↑?
- Need to clearly define welfare
- Communication and education about current welfare standards / outcomes
- Communication at a number of levels
- Customers are informed now – make choices off this level of education
- Consistent and auditable information to consumers – Channels? – requirements?
- Clear messages for consumers – campaigns – labelling
- Education!!
- Education!
- In store comms → ‘connection to food’ / ‘good food’
- TV – who? – what?
- Educating around good work – we meet legislative reg. as minimum!
- Industry as a whole – communications better – we have a lot to be proud of
- Product branding e.g. happy eggs
- Retailer ‘branding’ e.g. M&S milk
- Multi-attribute products all boxes ticked?
- Clarify what we mean by animal welfare / animal welfare standards
- We need to understand what is higher welfare ourselves first
- We should agree categories after 3 years?
- Isn’t welfare down to stockmanship
- Defining welfare – are min standards acceptable
- We (stakeholders) must understand and agree on what the welfare categories are.
- Assumption that market is not functioning
- We must not export our industry
- Why are markets not effective / efficient. AW a non-market good externality / public good information
- Assumption that welfare should be raised up the agenda – customers “not interested”
- What is the rationale behind thought that AWSG is not already being achieved?
- Can’t ignore external influences e.g. credit crunch

(pp) Solution Option: Continue as is

- what we do now is good
- Take a simplistic approach
- They want it done for them! (consumers)
- To operate effectively and transparency we need to be:
  - Consistent
  - Simple - to have an effect
- Do we need any more research or exploratory work?
(qq) Solution Option: Communication

- All to use a number of info outlets to provide info to customers
- Set requirements for information which must be provided (Govt?)
- Consistent info provision across retailers (Govt? Retailers?)
- Set format for all?
- Different media
- Taylor for different customers

(rr) Other Solution Options:

- Simple labels?
- Cartoons for children – film / visuals / images
- Education material for schools / children
- General education engagement about food and farming
- Use of media
- Explain current standards – communicate
- Magazines, TV ads, Red Tractor week, publicity campaigns
gocomparewelfare.com
- supply chain forum
- independent audit
- options:
  1) regulation (govt) (WTO)
  2) functioning of market → information

Group 4

(ss) Issues Arising

- Transparency ↔ Standards
- Market price signal cons → Production
- Transparency of standards used retailers and auditing methods
- Traceability of products
- “Fair Trade” for UK Farmers
- Producers are not against higher welfare, provided it does not impinge economic viability or a level playing field
- Ban products produced to standards below UK legislation – EU baseline
- Retailers only sell products which meet UK standards – practical – retailers –
some retailers
- Option – buy British – link to market signal
- Label by welfare level found at audit of farm – possible – assurance (existing)? –
effective
- Honest labelling of food e.g. British has to be really produced here etc – practical
  but tighter authenticity of cod – supported
- Trusted logo’s – Red Tractor, Lion, FF – supported
- Government procurement sets example by traceability of products
- Barrier = costs
- School level education – curriculum – future
- Education of consumers on husbandry systems and welfare assessments – farm assurance – info – freedom food – info – bodies – barriers – schooling constraints, cost, time, ethics
- EC market functions
- Option! Legislation
- Overarching – inform choices: practical / EVAC? / OCSF / Defra

(tt) Solution Option: legislation - ban products – non UK sub standard – EU

*Practicality*
- Yes

*Responsibility*
- EU, Government

*Effectiveness*
- Very effective

*Barriers*
- WTO

- Solution Option: Transparency in the market – fair returns – level playing field

*Practicality*
- complex

*Responsibility*
- whole market chain

*Support*
- Producers yes, retailers no

*Effectiveness*
- Very effective

*Barriers*
- Retailers / Wholesalers, Government
(uu) Solution Option: Trusted Logos (Buy British, F.F, Lion etc)

Practicality
- Yes but education

Responsibility
- Assurance, retail, Government

Support
- Yes - All

Effectiveness
- Yes

Barriers
- Retailers (brand)

(vv) Solution Option: Label method of production

Practicality
- Yes

Responsibility
- Industry

Support
- NGOS

Effectiveness
- No - not relate – actual – to welfare - standard

Barriers
- Retailers

(ww) Solution Option: Label by welfare outcome

Practicality
- complex
Responsibility

- Industry audit

Support

- NGOS

Effectiveness

- Very, if done properly

Barriers

- Research, some retailers

(xx) Solution Option: Education

Practicality

- Yes

Responsibility

- Government

Support

- All

Effectiveness

- Very

Barriers

- School and Time

(yy) Solution Option: Government Procurement

Practicality

- Yes

Responsibility

- Government

Support

- All
Effectiveness

- very

Barriers

- Cost

(zz) Other Solution Options:

- Media Welfare, TV
- Incentives

Group 5

(aaa) Issues Arising

- Education
- Retailer standards
- Labelling terms
- Raise min legal standards
- Increase availability at production
- Ban imports (imports meet dom. Standards)

(bbb) Solution Option: Education

Practicality

- We are doing it? Sustained behaviour change needed

Responsibility

- Buying now (consumers)
- Buying later (young)
- Everyone is responsible

Support

- Encourage industry to be proud of their industry and to educate others

Effectiveness

- Needs to be impartial and accurate
- Important to have a multi faced approach
- All parties working together towards shared objective – mutual confidence

Barriers

- Need a lead
- Conflict with other issues
- cost
(ccc) **Solution Option: Retail Standards**

- Promote existing schemes and brands
- Explore the market for product for higher welfare (not just meat) e.g. processed goods
- Catering increases transparency in products
- Improve transparency of AW provenance at restaurants, on-line etc.
- Practical therefore link with education to get consumer
- Chicken and egg! Waiting for consumer demand
- Market is working already – lessons learned and using these
- Shared understanding between stakeholders (as done in Poultry industry)
- Need for consistency between retailers
- Defining and auditing standards

(ddd) **Solution Option: Labelling / terms**

- Add welfare to broader quality package
- System label – free range etc
- Barriers – sector specific

Increase availability at production

- Improve accessibility to small producers for assurance schemes – decrease costs etc.

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**Group 6**

(eee) **Issues Arising**

- Who sets standards? FAWC
- Standards transparent and verified (consumer confidence)
- Transparency – who decides what is high welfare
- Buying decisions must be based on fact not fiction
- What issues = high / higher welfare
- Animal welfare standards above legal minimum
- Financial incentives for producers
- Traceability more information on where meat came from
- Don’t disadvantage UK producers vs. EU etc through adding transparency
- Focus on local source with respect for the farmer, land, animals and market by everyone in chain
- We might force consumers to engage with the issue
- Don’t treat animal welfare as a single issue
- Education on all aspects of food production, including witness / involvement in process
- We might make sure information is easy to process for the busy consumer
- Focus on those interested by the issue – not all consumers
- Definitions of different systems – agreement on tiers and standards
- Standards for retailers
- Supermarkets set AW standards – premium brand
- Retailer standards incorporating increased AW = buy ‘supermarket brand’
- Point of sale info on shelves. Promotion in retail magazines features – promoted in store. Internet – Waitrose video’s
Information at point of sale
Recognising retailers create points of difference on any attribute
Tmamc light system, bar graphs – other issues, ranking – education
Supermarkets pushing good standards as part of their brand
Single issues vs. range of benefits logo
Factual information easy to access, easy to understand, independant
3rd country products clearly identified
Bar code provides all production / welfare info – readable in-store / on phone app / on web
Producers sign up to a standard and are audited on this to gain a logo – marine conservation
Buy in from all stakeholders
In-store information – leaflets- shelf information
Consumer legislation (obligation to check source of food)
Legislation / licence for producers
Problem / solution highlight key welfare issues
Find out if there is a taste difference between high and non high welfare
Taste testing of welfare friendly goods
Behavioural economics – peer pressure; default; rewards; examples
Consumer segmentation and target information
Wide range of communications on the issue
Schools – children and parents
Education in schools – citizenship NGO driven? Providing teacher materials
Promotion of standards independent of product e.g. ‘buy free range’
TV and internet NGO’s - raising awareness celebrity support – NGO’s to drive? - effective but needs to be sustained
Increased awareness through media / education
Celebrities: TV
Trusted intermediaries e.g. membership organizations, consumer reps, NGO’s
Education awareness raising / 1st hand experience

Solution Option: CSR

Practicality
- Dynamic – easy to join
- Paradoxically, may therefore be perceived as week

Responsibility
- To be implemented by retailers

Solution Option: Supermarket Choice Editing

Practicality
- Appeals to consumers not wanting to think
- Plays to need to look ethical

Barriers
- Would supermarkets raise standards
- Self certification robust enough
(hhh) Solution Option: labelling

Practicality
- Done before so easy

Responsibility
- Implemented by supply chain red tractor and freedom food

Effectiveness
- Defining standards
- Comparative simple label might break complexity apathy barrier – 3 point scale e.g. low, medium and high. Would have to be standardised across all retail

Barriers
- Actual choice of label e.g. traffic lights very difficult
- Why better than existing schemes?
- 10% concerned consumers

(iii) Solution Option: Bar-coding

Practicality
- Yes it is practical. Backed by trading standards. Provides all information you need. Provides standards, states has been audited. Has integrity. Easily produced

Responsibility
- Implementation – the standard- setter, the authority behind the standards

Support
- The full supply chain – everyone must support it or wouldn’t work. Retailers could make mandatory

Effectiveness
- Effective – lower level because communities have to seek out information

Barriers
- Barriers to adoption – as above

(jjj) Solution Option: Education Only

Practicality
- Not related to purchases

Responsibility
- Government, resp. and NGO’s – social marketing

Effectiveness
Influencing children
More realistic consumers could influence supermarkets

Barriers
- Very long haul
- No good without progression in shops

But it should support all of the above options

Group 7

(kkk) Issues Arising
- What does voluntary mean?
- Higher welfare = higher margins
- Regulate imports
- Primary meat product

(III) Solution Option: use Eggs as the model

Practicality
- Start with eggs then roll out to
  - Broilers
  - Pigs
  - Beef
  - Dairy

Responsibility
- Leave it to the market

Effectiveness
- Product by product
- Graded vs. good /bad?

Barriers
- Negotiate with EC