

# Attitudes of Consumers, Retailers and Producers to Farm Animal Welfare

edited by  
Unni Kjærnes  
Mara Miele  
Joek Roex





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WELFARE QUALITY REPORTS NO. 2

This report is dedicated to the memory of Jonathan Murdoch.

Welfare Quality Reports  
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# PREFACE

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This working paper presents a first description of some major findings from surveys carried out in seven countries (France, the United Kingdom, Hungary, Italy, the Netherlands, Norway, and Sweden) in September 2005. The paper concentrates on describing national variations in public views on farm animal welfare in general and related shopping practices. We will later analyse how national variations can be explained by differences on the consumer side, in provisioning systems, regulatory arrangements, and social mobilisation. We will also explore the conditions for consumer involvement in and responses to market initiatives to improve farm animal welfare.

The present study is part of the Welfare Quality research project which has been co-financed by the European Commission, within the 6th Framework Programme, contract No. FOOD-CT-2004-506508. The text represents the authors' views and does not necessarily represent a position of the Commission who will not be liable for the use made of such information.

The Parts I and IV present work undertaken as part of Work Package 1.1 on Consumers. The National Institute for Consumer Research is responsible for coordinating this task and for coordinating the Work Package. The aim is to analyse consumer concerns about food animal welfare, the type of information demanded, and the most effective communication and information strategy. Work Package 1.1 is part of Sub-project 1, 'Consumers', Retailers' and Producers' Concerns and Requirements for Animal Welfare and Welfare Friendly Products', coordinated by Cardiff University.

The authors of Part II would like to thank their colleagues in Work Package 1.2 for their support and helpful feedback about this report through the process of writing it:

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More information on the Welfare Quality project can be found on the website <<http://www.welfarequality.net>>.

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Cardiff, January 2007

# PART I

## FARM ANIMAL WELFARE AND FOOD CONSUMPTION PRACTICES: RESULTS FROM SURVEYS IN SEVEN COUNTRIES

edited by

**Unni Kjærnes and Randi Lavik**

The National Institute for Consumer Research (SIFO), Norway



# INTRODUCTION TO PART I

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This paper deals with public opinions on farm animal welfare and how those opinions are linked to purchasing practices. Earlier studies have indicated that animal welfare can be of considerable concern among consumers when they buy food. Food quality is not only determined by the overall nature and safety of the end product but also by the perceived welfare status of the animals from which the food is produced. The Welfare Quality project aims to accommodate societal concerns and market demands, develop reliable on-farm monitoring systems, and develop product information systems and practical species-specific strategies to improve animal welfare. Throughout the project efforts are focused on three main species and their products: cattle (beef and dairy), pigs, and poultry (broiler chickens and laying hens). The information systems will be based upon consumer demands, the marketing requirements of retailers and stringent scientific validation.

Sub-project 1 investigates societal attitudes and practices, how they impact animal welfare, and assesses to what extent new welfare strategies might be achievable in practice. Sub-project 1 has three main work packages concerning respectively; consumers, retailers and producers. These work packages investigate how the different groups view animal welfare considerations and determine how more rigorous welfare standards might be adopted. Work package 1.1 analyses consumer concerns about farm animal welfare, the type of information demanded, and considers effective communication and information strategies.

This paper presents preliminary results regarding variations in animal welfare concerns, based on representative population surveys conducted in seven study countries. We have assessed the extent of social engagement in farm animal welfare issues and how this engagement is reflected in everyday consumption practices across Europe. We also describe to what degrees people trust various actors that are involved in animal welfare issues.

The findings are concentrated around four major themes:

1. Across Europe, a large majority say that farm animal welfare is important, but they are not necessarily worried. Although transport i.e. causes worry many are optimistic.
2. Much smaller proportions associate animal welfare concerns and worries with their own purchasing practices. Still quite a few do think about such issues when

shopping for food, which indicates a wider consumer definition of animal welfare than product labels offer.

3. Experts and NGOs are most trusted for telling the truth in case of an animal welfare scandal, public authorities in the middle, while market actors and politicians the least.
4. Countries differ. Italian and French respondents are quite worried about welfare conditions in their own country, concerns are often associated with food purchasing, and trust is relatively low. Hungarians worry and they are also more pessimistic, but animal welfare is of less relevance when shopping. The Dutch display lower interest, but many worry. Many do think of welfare conditions when shopping for eggs and beef. Trust is high. The British are quite similar, but trust is much lower. Finally, the Swedes and the Norwegians are engaged; they are trusting and not worried. Particularly in Norway, animal welfare is rarely associated with the consumer role.

# BACKGROUND AND RESEARCH QUESTIONS

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## 2.1 ISSUES WHEN STUDYING ANIMAL WELFARE AND CONSUMPTION

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The aims of accommodating societal concerns and market demands mean that we need to know what these concerns and demands are (Blokhuis et al., 2003). The project partners have made initial reviews of consumer concerns, labels and retailer initiatives, as well as producer led schemes (Miele, 2005). The reviews, which were conducted in six countries (France, the United Kingdom, Italy, the Netherlands, Norway, and Sweden), indicate that in most of the countries, there are a limited number of labels dealing specifically with farm animal welfare. Animal welfare is however often included as an element of labels linked to organic production, better-quality foods, etc. However, institutional contexts (i.e. market structure, regulatory framework and collective consumer mobilisation) vary considerably. This is important to consider when we study consumer views and consumption practices.

In general, awareness about animal welfare seems to have increased since the early 1990s and is currently an issue of importance to most Europeans (i.e. Bennett, 1995; Bennett, 1997; Hughes, 1995; Bennett and Blaney, 2002; Miele and Parisi, 2001; Beekman et al., 2004; Berg, 2002; Magnusson et al., 2001). An important awakening factor has been the various scandals involving the meat sector and debates in the mass media, followed up by an increasing amount of legislation to improve the welfare of farm animals within the EU. However, social mobilisation is most often reflected in more traditional political activities, such as a growing support of animal rights/welfare groups. Consumer concerns have not yet generated new and significant product developments or demands, except perhaps in the UK (i.e. UK Department for Environment, Food and Rural Affairs 2004 and M&S free-range eggs policy).

Awareness of animal welfare is not the only issue reflecting criticism towards contemporary farming methods and meat production. Many people are sceptical towards meat consumption referring to a range of topics, like safety and environmental issues as well as basic problems of eating foods that involve killing animals (i.e. Miele and Parisi, 2001; Jacobsen, 2001; Guzmán and Kjærnes, 1998; Velde et al., 2001; Verhue et al., 2003; Beekman et al., 2003, 2004; Szatek, 2001; Magnusson and Koivisto Hursti, 2002). Scepticism may be reflected in changes in demand, but not always and in all cases. Consumption statistics show significant drops following the BSE crisis in

Italy, France and Britain, particularly for beef. The consumption of beef has for the most part been restored to former levels. Even though increasing concerns were observed even in countries like Sweden, the Netherlands and Norway, there were no clear drops in demand (Kjørstad, 2004). Comparative studies indicate that trust in actors in the food sector may at least partly explain these differences (Poppe and Kjærnes, 2003; Miele and Parisi, 2001). Even where changes did occur after the BSE crisis, these short-term shifts rarely translated into long-term trends. Habits are not easily changed, eating and shopping for food are subject to considerable routinization, and processes of change usually take considerable time and will be influenced by a number of factors.

In relation to the issue of farm animal welfare, people are not only buyers of food. They are also citizens and they are eaters of food. These varying roles imply different considerations and capacities, and they refer to quite different contexts. As costumers, people relate to retailers of various kinds and to the food industry. Farm animal welfare is then transformed into an aspect or issue of food items that may or may not be considered when shopping for food. As citizens, people will refer to political and governmental institutions, to the media and to various forms of social mobilisation. As a social and political issue, farm animal welfare will be a matter of treatment of animals, which can be regulated and influenced in many different ways. Third, and importantly, eating food means sharing meals with family and friends. It also means ingesting foods that will affect your body. Eating is strongly normatively regulated and food items are subject to complex processes of classification. To the eater, the origins as live animals can be both distant and quite problematic. There are strong sets of norms and values associated with the relations between humans and animals and how animals can be used for food, such as limits regarding what is considered edible, which vary across time and cultures.

Food consumption is a matter of strongly routinized practices, in which these various roles and capacities are included and thus also highly interrelated. Food consumption activities are elements of our – often very mundane – everyday life. Consumption practices can be subject to serious reflection, but very often they are instead tacit and taken for granted. In trying to understand what people do and why they do it, this is very important. Considerations for animals and animal welfare may or may not be included in these practices, as a conscious reflection or just being a matter of routine. Buying free-range eggs, for example, can be part of a normalised practice that is not re-considered upon each act of purchase. It is just what you normally do when buying eggs.

For several reasons, animals' welfare conditions can also be kept out of the domain of food consumption. Buying particular welfare friendly food items rather than conventional ones presumes a market that differentiates on these aspects. Choices must be available and there must be sufficient information about these choices. And the alternatives must be acceptable in terms of price, safety, quality, etc. That is not always the case. There may be several reasons for farm animal welfare not being important when purchasing food, in spite of a person's interest and concerns. One alternative situation to one of market differentiation is that welfare conditions are regulated through other means, like legislation that imply high welfare standards. People may also consider their role as a citizen in other arenas than the market as more relevant and

important. Or the various market actors may not see farm animal welfare as a competitive issue upon which they want to differentiate. There will then be few options to select from. We also know that people can be ambivalent about eating foods of animal origin. It may be difficult to associate live animals with ingesting meat. Leaving meats out of the diet altogether or not eating particular types of meat occurs quite frequently in some countries, while this seems less problematic in other countries.

But the opposite may as well occur, where people make use of their purchases to express their citizen concerns. In several cases, we have seen that claims for improved farm animal welfare have been framed as consumer issues and also that this has been acted upon when shopping for food. In that way, food consumption can be an important source of innovation in the treatment of farm animals. The importance and impacts of these different roles will depend on the specific political and institutional conditions, including the structure of the food chain, the regulatory arrangements, and collective mobilisation. Animal welfare as a social problem on the public agenda in Sweden is not the same as in the United Kingdom. Shopping for food in Hungary is not the same as shopping for food in the Netherlands. And it is not the same to shop for eggs as for beef. Food preparation and meals are quite different in Italy and in Norway. Moreover, the food sector is changing rapidly. In some countries, welfare schemes, initiated by a number of different actors, have come up as an important element of the changes. Such schemes may, for example, represent a potential source of increased income for farmers and they may constitute an element in how big supermarket chains build up confidence in their own-label strategy and corporate social responsibility.

When exploring animal welfare and food consumption practices, we must therefore consider the various aspects of these practices and the particular contexts in which they have been formed. The Welfare Quality project offers very good opportunities for investigating this. The population survey is meant to provide one element, by investigating the patterns of food consumption across Europe, and the role and relevance of farm animal welfare in these practices.

In this paper we present some preliminary results about variations in animal welfare concerns between countries. Later analyses will explore further how such factors may correlate and how national and social variations may be understood within the context of everyday food consumption practices.

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## 2.2 EARLIER STUDIES

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Previous research on the subject of animal welfare has been reviewed earlier in this project, in a summary report covering the literature reviews of all seven participating countries (Kjørstad, 2005). It is worth drawing special attention to two major comparative studies: the EU-funded project “Consumer Concerns about Animal Welfare and the Impact on Food Choice” (CT98-3678) undertaken in five European

countries (Italy, UK, Ireland, France and Germany) from 1998 to 2001, and the EU Special *Eurobarometer 229 / Wave 63.2* “Attitudes of Consumers towards the Welfare of Farmed Animals” conducted in 25 European countries during the early spring of 2005. The findings from these projects support to some extent the preliminary findings presented in this report, although the research questions and ambitions of the projects differ somewhat.

The aims of the project “Consumer concerns about animal welfare and the impact on food choice” were to identify the nature and level of consumer concerns about animal welfare, and the qualitative and quantitative differences of such concerns within and between five EU member states – in order to assess the impact of changes in production practices on consumers choice of animal-based food products, and to explore the trade-offs consumers make between animal welfare and other product attributes. Lastly, the project’s ambition was to assess the future of the animal-based food products industry within the EU. The project employed both qualitative and quantitative methods. Analyses revealed that consumers were spontaneously concerned about food safety, health and quality rather than animal welfare. Participants tended to assume responsibility but claimed that, as individuals, they lacked information and were powerless to make any substantial changes. Many were willing to pay more for animal welfare friendly products but stated that the products would need other improved qualities (i.e. taste) as well. The results indicate that consumers are equally motivated by human health (anthropocentric) concerns as they are about animal welfare (zoocentric) concerns. The perceived relation between poor welfare conditions, food safety and the effects on human health significantly motivates concern about animal welfare, but even though the respondents claimed that they had reduced or substituted consumption due to animal welfare considerations this claim is unsubstantiated by market figures. The most important barriers to purchasing ‘animal-friendly’ products were lack of information and availability. Respondents rated consumers’ organisations, animal welfare organisations, friends/family, environmental organisations, butchers, scientists and farmers’ organisations ‘somewhat trustworthy’ as sources of information about farm animal welfare, whereas supermarkets, the food industry and the government were rated as ‘somewhat untrustworthy’. The project concludes that consumer concerns about animal welfare is multi-dimensional, and not alone enough to motivate consumers to purchase ‘animal-friendly’ products. Consumers make trade-offs between cost and animal welfare (although they rate cost the least important barrier) and, therefore, compromise their concerns about animals by expressing a pragmatic preference for semi-intensive production systems. Due to the nature of their concern, the explicit trade-offs between animal welfare and other product attributes and their compromises in terms of food choice, consumers favour a legislative, rather than a market, approach to improving farm animal welfare (Miele in Kjørstad, 2004).

The Special *Eurobarometer 229* “Attitudes of consumers towards the welfare of farmed animals” was undertaken shortly after the Amsterdam treaty was signed on October 29th 2004. This treaty officially recognise animals as sentient beings and demand full regard to the welfare requirements of animals in EU legislations. The survey focuses particularly on consumers’ attitudes towards the welfare and protection of farmed animals. It reveals distinctive differences between the 25 European member countries regarding animal welfare and protection. Explanations of these differences could be

variations in both production methods and purchasing power – which again might be the sources of country variations regarding levels of awareness and attitudes towards animal welfare. Overall the welfare and protection of farm animals in the EU is believed to be superior to other parts of the world, although the new EU members and some southern states seem less convinced. These animal welfare concerns do, however, not seem to be accounted for when shopping for food. But there are some significant country variations in this respect. New member states seem to focus the least on animal welfare when shopping. Identification of animal welfare friendly production systems is difficult in general, although North European countries are generally better off in this respect and hence more attentive towards animal welfare. Despite their trouble with recognising welfare friendly products, three quarters of the EU citizens believe in their own capacity to influence the welfare of farmed animals through their purchases. In addition, most people seem willing to pay more for welfare friendly products i.e. eggs. This is not so much the case in the Southern Europe and in the new member states (Special *Eurobarometer* 229, 2005).



# 3

## METHODS

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The survey includes data from seven countries of Europe; Hungary (HU), Italy (IT), France (FR), the United Kingdom (UK), the Netherlands (NL), Norway (NO) and Sweden (SE). Data was collected through a CATI survey, i.e. Computer-Assisted Telephone Interviews, conducted by TNS Global. This provides standardised, monitored interviews. Since we are giving priority to comparing countries, no open-ended and long interviews are recommended. The whole interview is not supposed to exceed 20 minutes, including the introduction of the theme.

The data were collected in the period from 12th to 27th of September 2005. To our knowledge no big animal welfare scandals, which might have influenced the answers, were on the agenda in this period in any of the participating countries. The bird flu from Asia reaching Europe occurred after this period of data collection.

The survey is based on probability samples, 1,500 in each country. The size of the samples is a combination of costs and the acceptability of statistical confidence intervals.<sup>1</sup> If we want to analyse subgroups, like regions, we must have a certain size of the samples. The samples are weighted by age, region, gender and household size per country.

The questionnaire was developed through a thorough process of communication between research teams in all study countries. Prior to running the survey, the questionnaire was piloted in all seven study countries, and adjustments made in line with feedback (focus on time efficiency, validity, question formulations and translations). After piloting, common instructions for all countries were developed. However, we are fully aware of the fact that the questionnaire is presented to people with different cultures and institutional settings. On the one hand, this is precisely the intent of this WELFARE QUALITY study, and the questionnaire was carefully constructed to meet this challenge. On the other hand, we can of course not preclude the possibility that some questions are interpreted differently across national and cultural settings. Questions about animal welfare may represent a “good cause”, which must be taken into consideration when interpreting and analysing the results.

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<sup>1</sup> We can calculate a confidence interval with a 95% probability, a distribution of 50/50% and a sample of 1500: 50+/-2.5 per cent points, there is a probability of 95% that the confidence interval of 47.5–52.5% may contain the true value.

Analyses presented in this paper are primarily based on frequency distributions compared between countries.

## PEOPLE ARE INTERESTED BUT NOT NECESSARILY WORRIED

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Earlier studies have indicated that animal welfare often is met with interest and concern. We will in this section first explore to what degree this is the case in all seven study countries. Then we ask whether interest also reflects worries about various specific aspects in their own countries. The assumption is that recognition of problems will form an important point of departure for people's involvement as citizens and consumers. This set of questions will also give information about which conditions that in people's opinion cause most concern. As a different intake to the level of concern we asked a question about whether the respondents think that welfare conditions in their own country have improved or deteriorated. This is a question that may be linked not only to whether people see a need for action on their own behalf, but also to trust in those actors that are involved in meat production and those that monitor and control these processes.

Figure 4.1 illustrates the various dimensions that we have included in order to map general opinions about farm animal welfare. The figure is intended to indicate that these dimensions may be correlated, but not necessarily completely overlapping. We should also be careful to infer that this is always a step-wise process, where for example general interest opens up for more recognition of problems regarding specific conditions and more concern for ongoing changes (perhaps because of clearer or higher expectations). It could also be that emerging recognition of problems leads to higher general interest. In general, it may be that such associations are found at a societal level, rather than being a matter of causal factors at the individual level. Later analyses will explore to what degree we find such processes, and whether even other types of associations and explanations are involved. In this paper we will concentrate on comparing patterns in public opinion at national levels.

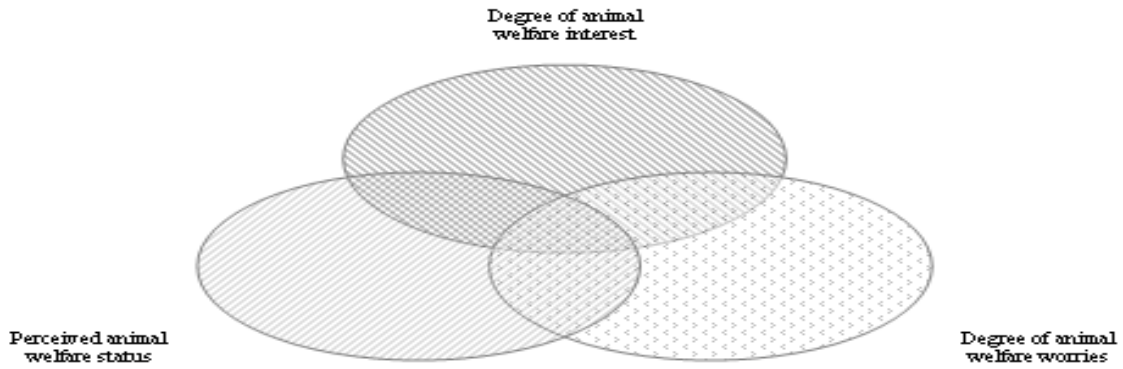


FIGURE 4.1 Illustration of different dimensions of public opinion about farm animal welfare.

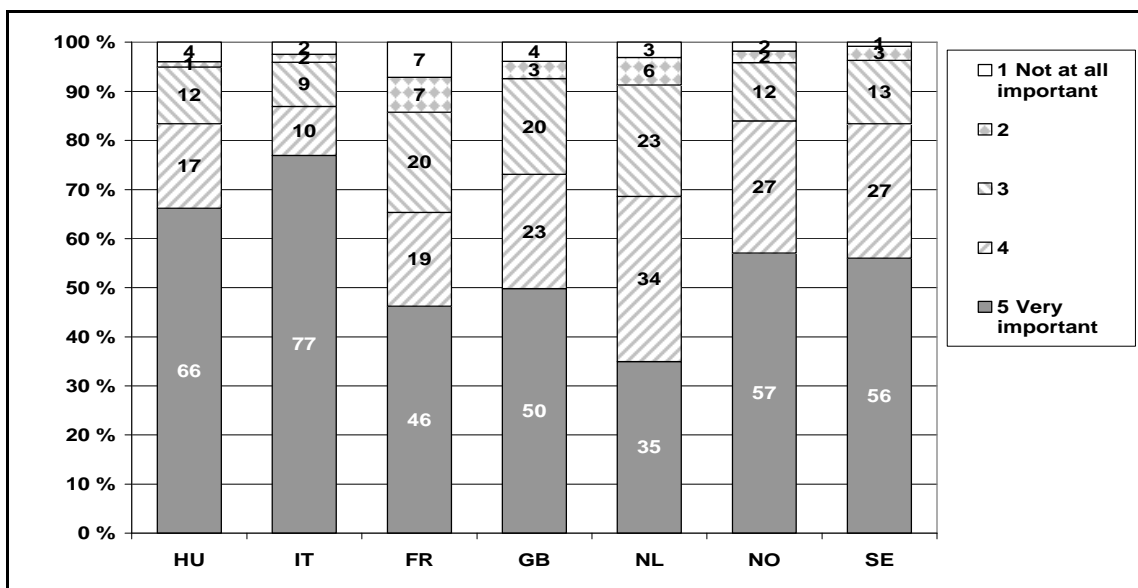


FIGURE 4.2 Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1 to 5, where 1 is not at all important and 5 is very important?

Note: Weighted. Don't know excluded. (N = HU: 1462, IT: 1478, FR: 1497, UK: 1490, NL: 1489, NO: 1493, SE: 1496).

#### 4.1 IMPORTANCE OF FARM ANIMAL WELFARE IN GENERAL

When asked how important animal welfare issues in general are to them,<sup>2</sup> the respondents to a large degree claim that this issue is important (Figure 4.2). Very few say that farm animal welfare is of little or no importance. Proportions answering very

<sup>2</sup> Thinking of animal welfare in general, how important is this issue for you on a scale of 1 to 5, where 1 is not at all important and 5 is very important?

important range from 35 per cent to 77 per cent between the seven study countries, placing the Netherlands at the bottom and Italy at the top. When merging the two most positive response categories (4 and 5), the ranking of all study countries is; France (65 per cent), the Netherlands (69 per cent), the United Kingdom (73 per cent), Hungary and Sweden (83 per cent), Norway (84 per cent) and Italy (87 per cent).

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#### 4.2 WORRIES ABOUT WELFARE IN THE REARING, TRANSPORTATION AND SLAUGHTERING OF FARM ANIMALS

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Placing importance on an issue does not necessarily mean that people are concerned and worried. We think that concerns will be influenced by how they consider the actual welfare conditions. In order to grasp consumer worries related to specific farm animal species, the respondents were asked to evaluate the living conditions of pigs, chickens and dairy cows in their own country.<sup>3</sup> Overall, the conditions for chicken are met with most worry (Table 4.1). With the exception of Hungary, 40–57 per cent of the respondents see conditions in chicken production as poor or very poor. Regarding pigs, few respondents in Norway and Sweden assess the situation as poor or very poor, while more than 40 per cent say the same in France and the Netherlands. Few utter worries about dairy cows in any of the countries.

Considering all three animal species together, we see that Norway, Sweden and Hungary cluster at the bottom regarding overall worries about farm animals' living conditions. In Norway and Sweden, very few worry about pig and dairy productions, while even here chicken rearing causes considerable concern. More widespread worries about the rearing of farm animals are found in the United Kingdom and Italy. The highest levels are found in France and the Netherlands, the most distinguishing factor being that they are considerably more worried about pig production than in the other countries.

Turning now to methods of transportation<sup>4</sup> and slaughtering,<sup>5</sup> we see that, in most countries, a majority is worried about welfare conditions in these situations (Table 4.1). When merging the proportions of the two most critical answer categories (1 and 2), we find that more than 40 per cent are worried for both issues in all countries. The exceptions are Norway and Sweden, where the ratings are much lower. In all countries, the conditions for farm animal transportation cause more worry than the methods used at the abattoirs. Respondents in Italy and Hungary have the most negative evaluations of welfare conditions in association with transportation and slaughtering methods.

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<sup>3</sup> In your opinion, how well do you think the welfare conditions are for the following farm animals in your country, on a scale of 1 to 5, where 1 is very poor and 5 is very good? Pigs/Chickens/Dairy cows.

<sup>4</sup> And, what about the methods used to transport animals in [fill in country], using the same 1 to 5 scale, where 1 is very poor and 5 is very good?

<sup>5</sup> And, in your opinion, how well do you think the animals are treated at the slaughterers in [fill in country] on a scale of 1 to 5, where 1 is very poor and 5 is very well?

TABLE 4.1 Worry about welfare for pigs, chickens, dairy cows, transport, slaughtering. Per cent proportion 1+2 (1=very poor)

	HU	IT	FR	UK	NL	NO	SE
Pigs	22	32	42	21	44	12	14
Chicken	29	50	57	56	49	46	40
Dairy Cows	15	15	15	12	10	3	5
Transport	60	65	52	48	56	34	34
Slaughter	58	56	44	42	47	25	23

*Notes:* The stated questions were: In your opinion, how well do you think the welfare conditions are for the following farm animals in [fill in country]?; And, what about the methods used to transport animals in [fill in country]?; And, in your opinion, how well do you think the animals are treated at the slaughters in [fill in country]? (Weighted. N=1500 in each country. Don't know excluded.)

Overall, Italians appear as most worried, particularly with regard to transportation and slaughtering. Worries are widespread even among French and Dutch respondents, but they are, compared to the Italians, more concerned with the rearing conditions. Hungarians' concerns concentrate on transportation and slaughtering methods, while considerably fewer say that rearing conditions are unacceptable from an animal welfare point of view. Norwegian and Swedish respondents are systematically less worried for all these aspects of farm animal welfare. Apart from the rearing of chicken, few think that welfare conditions are poor.

If we consider the general importance put on animal welfare in relation to these expressions of worry, we find that while the French and the Dutch consider farm animal welfare in general to be of least importance to them personally, compared to respondents in the other countries, they appear at the same time to be the most worried of farm animals living conditions in their own countries. The opposite effect occurs when Norwegians, Swedes and Hungarians claim animal welfare in general to be an issue of great personal importance – but at the same time seem to be the least worried of farm animals living conditions in their countries. There is most agreement between the importance put on farm animal welfare in general and worry about farm animals' living conditions among the British and the Italian respondents.

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#### 4.3 EVALUATION OF CHANGE IN WELFARE CONDITIONS FOR FARM ANIMALS OVER THE LAST DECADE

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As another intake to the question of whether people worry, we asked for evaluations of change regarding farm animal welfare in their own country over the last ten years, whether conditions have improved, remained more or less the same, or have got worse.<sup>6</sup> Overall, most respondents believe that the farm animal welfare has improved over the

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<sup>6</sup> In general, over the past 10 years, do you think that farm animal welfare in [fill in country] has improved, is about the same or has got worse?

last ten years in their own country (Figure 4.3). The proportions saying that conditions have “improved” range from 55 per cent to 69 per cent, the only exception being Hungary. More Hungarians say that conditions have remained the same or have deteriorated. In the other countries, about one third to one fourth say that there have not been major changes, with the highest proportions (after Hungary) in France and the United Kingdom. This mid category is not necessarily a neutral position. No change may also indicate that conditions are believed to be as bad – or as good – as before.

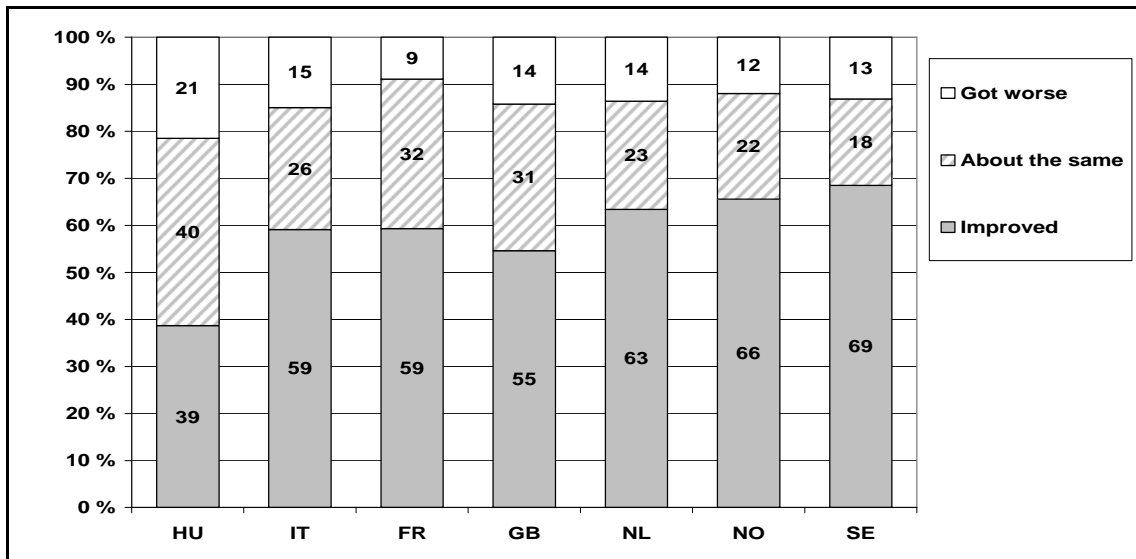


FIGURE 4.3 In general, over the past 10 years, do you think that farm animal welfare in [fill in country] has improved, is about the same or has got worse?

Note: Weighted. Don't know excluded (N = HU: 1310, IT: 1365, FR: 1483, UK: 1384, NL: 1434, NO: 1463, SE: 1393).

The number of respondents answering “don't know” is fairly high regarding all the specific questions about living conditions for farm animals (Table 4.2). In particular, Hungarians and Italians are not only sceptical about farm animals living conditions; they also have very high proportions of “don't know” answers. For example in the case of slaughtering methods 28 per cent of the Hungarians and 26 per cent of the Italians don't know how the methods used in their own country are. Hungary and Italy display the highest rates of don't know throughout. Sweden and the United Kingdom forms a middle group, while the Netherlands, Norway and France consistently have the lowest “don't know” rates. These high levels of respondents who answer “don't know” indicate that people have great difficulties assessing the welfare status of farm animals. This may be an indication of the status of knowledge about these issues. We can, of course, not assume that those being able to answer are well informed. But for those saying they don't know, the lack of knowledge (and perhaps motivation) has prevented them from taking A position at all. The proportions saying “don't know” are much lower and within a normal range for most of the other quesitons included in the interviews.

TABLE 4.2 Proportions saying they don't know whether farm animal welfare conditions are good or bad (per cent)

	HU	IT	FR	UK	NL	NO	SE
Pigs	12	20	2	12	3	3	9
Chicken	10	16	1	7	1	2	6
Dairy cows	15	16	1	7	2	1	4
Transport	8	16	1	8	2	7	10
Slaughtering	28	26	3	18	10	6	19
AW improved or become worse	13	9	1	8	4	2	7

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#### 4.4 OVERALL FEATURES

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Taken together, we find that across the seven countries general interest in farm animal welfare is high. One might say that farm animal welfare is 'a good cause', something that it is difficult to disagree with. Yet, there are considerable differences between the countries, with Italians most strongly emphasising animal welfare in general, the Dutch the least. Country differences are even more pronounced when we look at how this interest is reflected in worries about current welfare conditions. There are most worries about chicken rearing, in some countries even rearing conditions for pigs, while few people across Europe worry about the welfare of dairy cows. Transportation is also met with widespread worry, somewhat less for slaughtering. This "ranking" of worries is similar in all countries. There are no clear patterns with regard to general interest and the degrees of worry. In particular, while the French and the Dutch present the most relaxed attitudes towards farm animal welfare issues in general, there are considerable proportions in these countries that are worried. The Scandinavians, on the other hand, are very interested, but few worry. People are generally quite optimistic regarding the changes in welfare conditions for farm animals. Relatively few think that conditions have become worse. The same tendency is found in all countries, but the extent varies a bit, Hungarians being most worried.

## CONSIDERATIONS OF ANIMAL FRIENDLINESS WHEN PURCHASING FOOD

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People's engagement in animal welfare issues may appear in many different forms and arenas. Buying welfare friendly products is one way. We asked several questions where animal welfare conditions were linked explicitly to their own shopping practices. We will first present a general question about meat purchases. We then focus on eggs, where the general availability of animal friendly varieties is best, and beef, which is a type of meat that is included in the diet in all countries (even though to a somewhat varying extent). Turning first to meat, when asked if animal welfare is considered when buying meat<sup>7</sup> more than half of the Italians and the Swedes use the two most positive values of a five point scale (4 and 5) (Figure 5.1). The proportions among the Dutch and the Norwegian respondents are lowest. When comparing these results to general emphasis on farm animal welfare,<sup>8</sup> we see that general interest is not necessarily reflected in concerns when shopping. This is most evident among Norwegians, where 84 per cent see animal welfare as generally important, while only 26 per cent think of animal welfare when buying meat. The difference is also high among Hungarian and Dutch respondents. In France, Sweden, Italy and The United Kingdom the difference between concerns and thoughts of concerns when buying also ranges from 28 per cent to 34 per cent. These results indicate that the relevance of farm animal welfare when buying food is not a self-evident consequence of a more general concern for farm animal welfare.

Still, farm animal welfare appears as quite important even within the context of shopping. There is even higher engagement when specifically asking about eggs<sup>9</sup> and beef,<sup>10</sup> referring also to more specific welfare conditions. The proportions answering "very important" range from approximately 60–80 per cent in the various countries (Table 5.1). In general, the treatment of the animal is considered to be slightly more

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<sup>7</sup> When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1 to 5 where 1 is never and 5 is always?

<sup>8</sup> Thinking of animal welfare in general, how important is this issue for you on a scale of 1 to 5, where 1 is not at all important and 5 is very important?

<sup>9</sup> Continuing with eggs, are the following factors very important, fairly important or not important to you? Freshness/Low price/Organic/Treatment of the hens/Hens are not treated with antibiotics or hormones.

<sup>10</sup> Now thinking specifically about beef, are the following factors very important, fairly important or not important to you? Treatment of the animal/Slaughtering methods/Low price/Raised outdoors for parts of the year/Animal is not treated with antibiotics or hormones?

important when buying beef than when buying eggs. The exceptions to this is France, where it is the other way around, and Norway, with fairly low proportions of “very important” regarding both products.

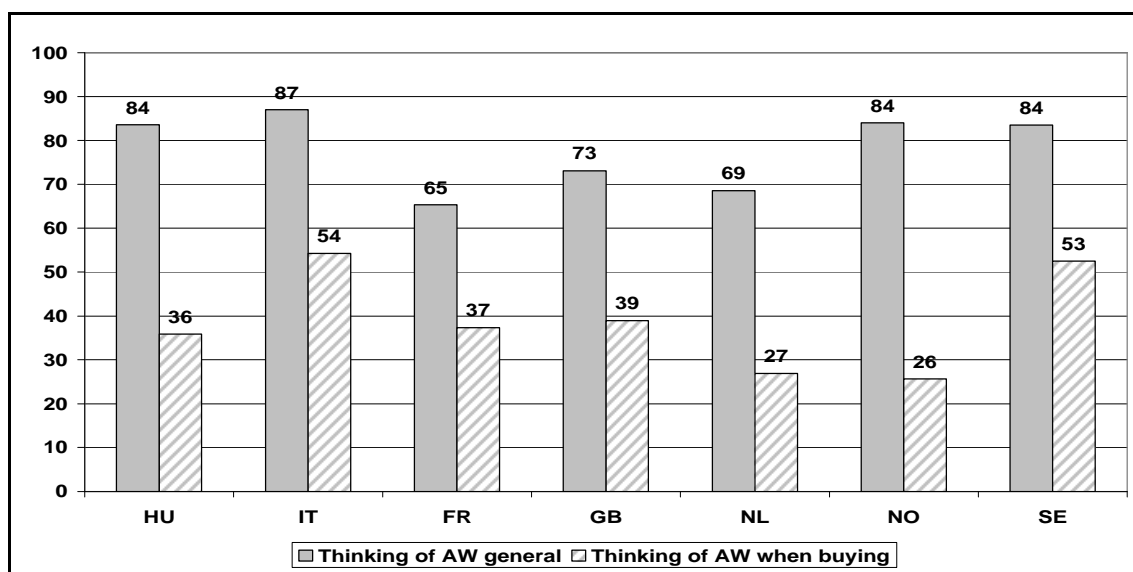


FIGURE 5.1 Thinking of animal welfare in general (among all), Thinking of animal welfare when buying (among those who have bought meat). Per cent proportion 4+5 on a scale from 1 to 5.

Notes: Thinking of farm animal welfare in general, how important is this issue for you? (Weighted. Don't know excluded. N = HU: 1462, IT: 1478, FR: 1497, UK: 1490, NL: 1489, NO: 1493, SE: 1496.); When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come? (Among those who have bought meat. Weighted. Don't know excluded. N = HU: 1249, IT: 1173, FR: 1337, UK: 1330, NL: 1248, NO: 1364, SE: 1334.).

TABLE 5.1 Are the following factors very important? Per cent proportion “Very important” among those who have bought eggs and/or beef.

	HU	IT	FR	UK	NL	NO	SE
<i>Price</i>							
Eggs	31	26	33	20	22	13	10
Beef	38	17	24	19	23	17	13
<i>Eggs</i>							
Organic	39	45	40	23	35	12	25
Treatment of the hens	58	77	73	64	62	41	59
<i>Beef</i>							
Treatment of the animal	61	79	64	69	67	48	71
Slaughtering methods	47	62	52	59	52	39	51
Raised outdoors for part of the year	59	78	65	57	66	48	47

Note: Continuing with eggs, are the following factors very important, fairly important or not important at all? A. Low price. B. Organic. C. Treatment of the hens. And, Now thinking especially of beef, are the following factors very important, fairly important or not important to you? A. Low price. B. Treatment of the animal. C. Slaughtering methods. D. Raised outdoors for part of the year (Weighted. N=1500 in each country, Don't know excluded).

To many people, higher standards of animal friendliness will be seen as one aspect of organic production. Importance placed on organic production of eggs varies from 12 per cent of “very important” answers in Norway to 45 per cent in Italy. Italy, France, Hungary, and the Netherlands cluster as most interested in the eggs being organic, while respondents in Sweden and the United Kingdom forms a middle group.

Large proportions say that when buying beef, they give emphasis to animal welfare factors such as treatment of the animal, slaughtering methods and outdoor access. The treatment of the animal is generally considered the most important factor, with the average proportion being 66 per cent. The animal being raised outdoor parts of the year has an average of 60 per cent, while slaughtering methods has an average of 52 per cent throughout the seven countries. When adding all “very important” for the three factors per country, Italy clearly have the highest score, while the United Kingdom, the Netherlands, France, Sweden and Hungary cluster in the middle group and Norway once again stands out at the bottom of the scale.

The generally very high scores that we find for these questions indicate that people do link farm animal welfare conditions to their role as food consumers. However, considering the low market shares of animal friendly and organic products, the responses cannot be interpreted as practices of choosing particularly labelled products. What the respondents have in mind must be much more general, like preferring products coming from local or regional farmers (or from their own country), or buying fresh rather than pre-packed products. Further analyses of the focus group interviews that have been carried out in the same countries will help us understanding what people mean by emphasising animal welfare when purchasing food.



## 6

# AVAILABILITY IS A BIGGER PROBLEM THAN PRICE

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We assume that purchasing routines will be influenced by practical considerations and possibilities that are made available where people normally shop for food. In this survey we have concentrated on availability, where we already know that there are limitations in several of the countries, and price, a basic aspect in all market exchange.

We first turn to what people think about the availability of animal friendly products. The respondents were asked whether they agreed or disagreed that welfare friendly products are too time consuming and whether they are hard to find.<sup>11</sup> Quite similar patterns are revealed for both statements, where availability seems to be a limiting factor for considerable proportions of the respondents in all seven countries (Table 6.1).

TABLE 6.1 It is too time consuming to look for welfare friendly products; I cannot find welfare friendly products when shopping. Per cent proportion 4+ 5 (5=strongly agree)

	HU	IT	FR	UK	NL	NO	SE
Too time consuming	53	51	41	36	35	48	44
Cannot find animal welfare products	61	42	38	36	23	32	35

*Note:* To what extent do you agree or disagree with the following statements on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree?

- I care about animal welfare, but it's too time consuming to look for welfare friendly products;
  - I care about animal welfare but cannot find welfare friendly products where I shop for food.
- (Weighted, 1500 in each country. Don't know excluded.)

Hungarians score highest on both statements, strongly agreeing that it is too time consuming (53 per cent) and hard to find (61 per cent) welfare friendly products. At the other end of the scale, the Dutch are much less inclined to worry about availability (respectively 35 and 23 per cent). All other countries hold proportions between 40 and 50 per cent. For the most part, the respondents tend to agree more strongly with the statement of purchasing animal welfare friendly products being too time consuming

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<sup>11</sup> To what extent do you agree or disagree with the following statements on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree?

- I care about animal welfare, but it's too time consuming to look for welfare friendly products;
- I care about animal welfare but cannot find welfare friendly products where I shop for food.

than that the products are hard to find. In Norway, the Netherlands, Italy, and Sweden the difference is 10–15 per cent points. In Hungary this is the other way around, with the argument of availability ranging 8 per cent points stronger than the argument of time. We might interpret this as expressing even bigger problems of availability, however interested and committed the Hungarian consumers are.

The questionnaire included two questions about the importance of price when purchasing eggs and beef, respectively (Table 5.1).<sup>12</sup> When comparing the proportions of “very important” answers regarding price as an important factor when buying eggs and beef, we find Hungary (38 per cent) on top regarding the price of beef and France (33 per cent) on top regarding the price of eggs. We find Sweden at the bottom end for both questions, in close company of Norway. Country variations may at least partly be a reflection of different levels of income. While being phrased in different ways, both sets of questions refer directly to the respondent’s purchasing practices. Compared to concerns for availability, the answers indicate that price is considered less important when buying eggs and beef.

Concerns for farm animal welfare within the market context is considerably lower than when asking more generally about people’s interest in the issue. However, and more surprisingly, there is higher engagement when specifically asking about eggs and meat than when asking about shopping in general. The treatment of animals is somewhat more important, slaughtering somewhat less, outdoors in the middle. There are considerable national variations in the levels of engagement and worry as well as in which conditions (and foods) that are receiving most attention.

Least engagement as consumers is found in Hungary, except for eggs. The provisioning of eggs in Hungary is special, linked to very small-scale production and a considerable proportion distributed through informal networks. Interest in farm animal welfare is not that much associated with shopping for food in Norway either. Availability is low even here, but lack of availability alone cannot explain this. Further analyses will explore how this may be related to for example a particular societal distribution of responsibility for farm animal welfare in Norway. Engagement as consumers is higher in the other countries, most so in France and the Netherlands.

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<sup>12</sup> Continuing with eggs, are the following factors very important, fairly important or not important at all? A. Low price. B. Organic. C. Treatment of the hens. And now thinking especially of beef, are the following factors very important, fairly important or not important to you? A. Low price. B. Treatment of the animal. C. Slaughtering methods. D. Raised outdoors for part of the year.

## THE TRUTH-TELLING OF INSTITUTIONAL ACTORS

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### 7.1 WHO WOULD TELL THE WHOLE TRUTH IN CASE OF AN ANIMAL WELFARE SCANDAL?

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Trust and distrust in different organisations and institutions influencing food and animal welfare was assessed with a battery of questions about whether ten different actors would tell the whole truth, only tell parts of the truth, or give misleading information in the case of a an animal welfare scandal.<sup>13</sup> Two main points come out of this (Table 7.1). First, overall, the proportions saying that actors in the food system would tell the whole truth vary considerably between countries. The Hungarians and the Dutch seem generally to be the most trusting, while the British, the Italians and the French display the lowest levels of trust in truth-telling in this case of animal welfare.

It is important to keep these overall levels of trust in institutional actors in mind, as they indicate the degree of trust in organisations and people they don't know personally and where their own experience is limited. Effective communication in the forms of for example campaigns and labels requires that people trust the actors involved in the communication. Likewise, for people to participate and take on responsibility will require a certain level of shared norms and expectations. Other actors must be believed to contribute, be reliable and not follow their own goals and interests too much at the cost of consumers' and common interests. In settings where such types of relations are not established and institutional distrust is more prevalent, people may instead seek to rely on more limited personal relations and local networks that refer to long-term experience and familiarity rather than a more general trust in organisations like supermarket chains, expert bodies or food authorities.

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<sup>13</sup> Imagine a scandal concerning the welfare of chickens in [fill in country]. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give you misleading information? Press, television and radio / The food processing industry / Food retailers / Farmers or farmers groups / Consumer organisations watchdogs / Animal protectionists / Politicians / Public food authorities (like the Food Standards Agency) / Independent food experts (e.g. academics) / The EU.

TABLE 7.1 Truth-telling in case of a scandal with animal welfare. Per cent proportions of “tell the whole truth”

	HU	IT	FR	UK	NL	NO	SE	Total*
<i>Civil Society</i>								
Mass media	18	13	11	14	21	27	27	19
Consumer organisations	49	50	53	59	63	58	52	55
Animal protectionists	66	55	54	30	54	52	35	49
Food experts	62	48	42	44	71	56	48	53
<i>Public Authorities</i>								
Politicians	6	3	2	3	8	7	5	5
Food authorities	53	34	27	35	57	60	46	45
EU	36	21	9	12	18	10	9	16
<i>Market Actors</i>								
Food processing	11	6	5	8	7	6	10	8
Food retailers	7	6	10	10	13	7	10	9
Farmers	24	9	15	24	27	19	24	20

*Notes:* Imagine a scandal concerning the welfare of chickens in [fill in country]. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give you misleading information? Press, television and radio / The food processing industry / Food retailers / Farmers or farmers groups / Consumer organisations watchdogs / Animal protectionists / Politicians / Public food authorities (like the Food Standards Agency) / Independent food experts (e.g. academics) / The EU. (Weighted. 1500 each country, Don't know excluded.)

\* Total for 7 countries, not weighted for country size. Total mean is calculated as the mean of the country averages.

Second, in all countries there is a clear differentiation between the various types of actors. Food experts, consumer organisations, animal protectionists, and food authorities generally receive most trust in this case of truth-telling. EU institutions are generally less trusted than national authorities. Retailers, the processing industry, and farmers are much more rarely believed to tell the whole truth and often to give misleading information. Politicians rank lowest. The Civil Society grouping rank the highest while the public authorities are the middle group and the market actors are the least trusted group.

There is, however, some variation in the trust that is placed in the various types of actors. From the ranking order already presented we can see that people generally make sharp distinctions between actors with different roles, capacities and interests. The three groups can be characterised as civil society actors, public authorities, and market actors. These three groups are different in terms of their tasks and dealings with openness and independence, as well as their type of influence and power. The civil society actors rank highest, while public authorities form a middle group and market actors are the least trusted. That means that they benefit from openness, in many cases demonstrating this independence. Their influence is based on that, as they will not have the economic power or the authority to sanction that the other two types of actors have. On the other hand, because attention is so important, such actors may be mistrusted in terms of for example exaggerating a problem or – in the end – not being as independent as they claim to be. Public authorities will be expected to have the power of authority and, in classical terms, they are expected to represent a ‘third party’ that can protect common interests in relation to for example market actors. They are, however, not always

believed to live up to this role, partly being criticised for being too heavily influenced by powerful interests in society, partly being too concerned with their own power and prestige. Finally, economic actors are often expected to put their own business interests before anything else. Information will then be carefully managed, so that these interests are not hurt. Not all market actors are always put into this category. For example, farmers can be seen as taking on a different role as somebody who is not committed only to competitive business concerns. Or the food industry can be seen to make significant contributions to the level of welfare in society. Today, many food companies are struggling to establish an image that goes beyond economic competition, for example through corporate social responsibility schemes.

From this, it is therefore not surprising that we find that people make these distinctions. A very similar pattern was also observed in a study of consumer trust that focussed mainly on food safety (Poppe and Kjærnes, 2003). Yet, it is important to recognise that there are considerable variation in the levels of trust observed in these two studies. Trust seems to vary between different food issues and it may change over time. Important for our further analysis of consumers and animal friendliness is, however, that there are considerable differences between the countries, indicating that the roles as well as the performance of various actors can diverge.

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## 7.2 ADDITIVE INDEXES

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In order to explore this a bit further, we have constructed additive indexes, first, an index including all ten variables “Truth-telling” (Table 7.2), and next, a set of three indexes referring to three groups of actors; “Civil society” (4 indicators), “Authorities” (3 indicators) and “Market actors” (3 indicators) (Table 7.3).

Procedure for computing the indexes are as follows: First, the values of each variable (indicator) included in the indexes are coded as: ‘Give misleading information’=0, ‘Only tell you part of the truth’=1, ‘The whole truth’=2. Don’t know is excluded. Second, after computing the four additive indexes, the ‘truth-telling’ index consisting of 10 variables will vary between 0 and 20, the ‘Civil Society’ consisting of 4 variables will vary between 0 and 8, and the two latest indexes, ‘Authorities’ and ‘Market actors’ consist of 3 variables each, and will vary between 0 and 6. Third, to have the possibility to compare these indexes with each other, all indexes were standardised and adjusted to vary between 0 and 100. The mean can be interpreted as average scores.

TABLE 7.2 Average truth-telling. Additive index, consisting of 10 indicators

Country	Mean	N	Std. Deviation
Hungary	60	1046	15.715
Italy	51	1200	17.260
France	52	1465	14.589
United Kingdom	49	1304	16.777
Netherlands	59	1348	15.506
Norway	57	1304	15.358
Sweden	55	1336	15.109
Total*	55	9003	16.158

*Note:* \* Total for 7 countries, not weighted for country size. Total mean is calculated as the mean of the country averages.

First, Table 7.2 shows that when we consider the whole distribution of answers, not only the proportions who would tell the whole truth, we get a slightly different picture from what was presented in Table 7.1. Considering all actors together, it appears that the Hungarians have the highest expectations of truth-telling. The overall indexes are high even in the Netherlands and in Norway. The clearly lowest index score is found in the United Kingdom. Compared to the other countries, scores are low even in Italy and France.

If we then turn to the indexes for the three types of institutional actors, the overall impression already mentioned is confirmed, in that people generally have the highest trust in actors representing the civil society, regarding truth-telling connected to an animal welfare scandal (Table 7.3). The actors in the authorities group rank a little higher than the market actors, but the difference is not very clear.

Table 7.3 shows that Dutch respondents have the greatest trust in civil society actors as truth-tellers with an index score of 72. Even the Hungarians and the Norwegians have high scores here. The British respondents have the clearly lowest score of 59, but even the Italians and the Swedish have relatively low scores for trust in civil society actors. Looking back at Table 7.1, we see that the low scores in Britain and Sweden are mainly due to their low trust in the truth-telling of animal protection organisations. The most remarkable feature in the Netherlands in this regard is the Dutch high trust in food experts.

Regarding trust in authorities as truth-tellers, the Hungarians score the highest at 58, followed by the Dutch and the Norwegian respondents. At the other end of the scale, we find that the French, together with the British again - have the lowest score at 42. Even Italian respondents score rather low. The institutions included in this index are very diverse in terms of trust, where national food authorities generally score rather high, while few trust that politicians and EU institutions would tell the whole truth. Still, it seems that in many cases these scores point in the same direction within one country, compared to the other countries. For example, the French and the British respondents have less trust in their public authorities than respondents in many of the other countries when it comes to animal welfare. Relatively speaking, they also score lower on trust in EU institutions and politicians.

TABLE 7.3 Average truth-telling, three dimensions. Additive indexes

	Civil Society 4 indicators	Public Authorities 3 indicators	Market Actors 3 indicators
<i>Hungary</i>			
Mean	71	58	47
N	1233	1182	1318
Std. Deviation	19.032	21.011	20.752
<i>Italy</i>			
Mean	65	46	36
N	1341	1312	1368
Std. Deviation	20.810	22.137	22.905
<i>France</i>			
Mean	66	44	43
N	1480	1488	1487
Std. Deviation	18.707	19.771	20.558
<i>United Kingdom</i>			
Mean	59	42	44
N	1399	1406	1409
Std. Deviation	21.483	22.852	22.366
<i>Netherlands</i>			
Mean	72	54	46
N	1434	1417	1423
Std. Deviation	19.091	22.567	22.052
<i>Norway</i>			
Mean	69	54	45
N	1385	1398	1411
Std. Deviation	20.970	19.586	20.960
<i>Sweden</i>			
Mean	63	50	50
N	1390	1430	1434
Std. Deviation	20.394	20.416	20.373
<i>Total</i>			
Mean	66	50	44
N	9662	9633	9850
Std. Deviation	20.488	21.864	21.776

*Notes:* Civil Society , includes: Press, television and radio / Consumer organisations/watchdogs / Animal protectionists / Independent food authorities; Authorities , includes: Politicians / Public food authorities / The EU; Market actors , includes: The food processing industry / Food retailers / Farmers or farmers groups; Total for 7 countries, not weighted for country size. Total mean is calculated as the mean of the country averages.

When it comes to trust in market actors as truth-tellers, the Swedish rank highest at 50 while Italians are at the bottom with 36. The rest of the countries come out as quite similar with scores between 43 and 47, with Hungary and the Netherlands scoring highest of these. As already mentioned, all market actors rank low in terms of whether people's beliefs that they would tell the truth in case of a scandal with animal welfare. The internal ranking is also quite consistent, with the farmers somewhat more trusted than retailers and the processing industry (Table 7.1). When dealing with an issue like animal welfare, this is not unimportant. Perhaps we here can see a parallel to people's

higher worries for what happens to the animals during transportation and slaughtering than for the rearing of the animals.

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### 7.3 OVERALL FEATURES

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In general, we find that people across Europe are quite sceptical when it comes to beliefs in the truth-telling of institutional actors. There is some variation in the levels of belief in truth-telling, but the ranking of the actors is quite similar. Politicians, the processing industry and retailers are most often believed to give misleading information, while very few think that they tell the whole truth in the case of a scandal with animal welfare. The role of market actors can of course not be disregarded when it comes to the improvement of farm animal welfare. But in terms of trustworthiness, independent parties are important. The only type of actor where a majority in all countries believe they would tell the whole truth are consumer organisations. But then, these organisations are rather marginal when it comes to dealing with animal welfare issues. It is probably more important that other civil society actors, such as food experts and animal protectionists, are often trusted to tell the whole truth in case of a scandal with animal welfare for chicken, and they rarely to give misleading information. Food authorities are quite often believed to tell only parts of the truth, but rarely give misleading information. Even though not having an unambiguous position, this seems important for developing trustworthy programmes for animal welfare standards, monitoring and information.

For our further analyses, the observed national variations are interesting. The Hungarians, the Norwegians, and the Dutch seem generally to be the most trusting when it comes to farm animal welfare, while the British, the French and the Italian respondents display the lowest levels of trust in truth-telling. The British (and the Swedes) seem to be the most selective, with higher trust in some actors, lower trust in other actors. This variation is not a direct reflection of the degrees of worry over animal welfare conditions, as described in previous sections.

## CONCLUSIONS TO PART I

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These preliminary analyses indicate some common features in public opinions about farm animal welfare across Europe. But there are also noticeable national differences. These similarities and differences will be explored further in later analyses, where other survey questions as well as data from other parts of the Welfare Quality project will be employed.

Farm animal welfare is clearly an important issue for ordinary people across Europe. Our findings confirm earlier studies in that respect. But emphasis and worry is not the same. A majority is actually quite optimistic regarding recent trends. Worries are unevenly distributed across the seven countries, together with varying proportions that are unable to assess the situation and say they don't know. National contexts may influence people's specific experiences, general evaluations of performance, as well as media attention. But worries (and saying they don't know) may also reflect an underlying uncertainty and scepticism towards the handling of farm animals in contemporary food provisioning systems.

Even though to a more limited extent, many Europeans also think about animal friendliness when shopping for food. Even here, earlier studies are confirmed. Variations in the association between concern and involvement as consumers indicate that taking on responsibility does not depend only on individuals' interests and their ethical considerations. The distribution of responsibilities between consumers, the various market actors, and the state, can be very variable from one country to the next. Taking on responsibility as a consumer, must be associated with the possibilities to act that they find in the food market that is available to them in their everyday routines. Availability and sufficient, reliable information, to some degree even affordable prices, are therefore crucial. We see here that availability can be a considerable problem in several, but not all the seven countries. We are, however, a bit hesitant to conclude from our findings here that price is of little importance. It may well be that this setting of animal welfare concerns has made many respondents reluctant to say that price is important.

Moreover, making responsible purchases will depend on what people mean by animal friendliness. The emphasis given to animal friendliness when shopping for eggs and beef are much higher than the market shares for labelled products. It is probable that people's understanding of animal friendly food items is much wider than referring to items that are labelled as particularly animal friendly.

People's engagement is also a matter of trust in those who provide and control the food and in information sources. The widespread belief that food providers will not tell the whole truth and that many of them will give misleading information, probably expresses a general expectation that such actors will act strategically to protect business interests in case of a scandal. Thus, independent monitoring and information seems crucial. Animal welfare organisations and food experts are generally trusted (if not everywhere), but they may not always have the resources needed to take on such tasks alone. To the degree that food authorities take this third party role, which they often do, trustworthiness will therefore depend on their ability to demonstrate independence, through transparency, use of independent expertise, etc. At the moment, people's assessment of their ability to do so varies considerably across Europe.

## PART II

# ANALYSIS OF THE RETAIL SURVEY OF PRODUCTS THAT CARRY WELFARE-CLAIMS AND OF NON-RETAILER LED ASSURANCE SCHEMES WHOSE LOGOS ACCOMPANY WELFARE-CLAIMS

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Work package 1.2, subtasks 1.2.2.1 and 1.2.2.2  
EU Food-CT-2004-506508



## INTRODUCTION TO PART II

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This report serves two aims. Firstly, this report contains analysis of the retail audit (sub-deliverable 1.2.2.1) of welfare-friendly food products in the six study countries.

The report gives the results of an emerging comparative analysis of the ‘market’ for welfare-friendly food products in the six study countries. It also outlines ‘non-retailer’ led schemes<sup>14</sup> whose products occurred in the study. In this way, an emerging picture of the actual product ranges, that make claims about welfare-friendliness, will be drawn based on fieldwork carried out from November 2004 until April 2005. Also, the report explores how the different legislative and voluntary standards on animal welfare compare across different countries and how these actively advertise their welfare-friendlier component to consumers through food packaging.

The report is a summary of the work carried out in sub-deliverables 1.2.2.1 and 1.2.2.2. The aim of which was to survey, categorise and assess selected products of identified retailers as part of a ‘retail audit’. Previous studies discuss the types of welfare-friendly schemes that UK retailers have previously adopted (e.g. Harper and Henson, 2000; Compassion in World Farming, 2002). In such studies, ‘best practice’ examples are highlighted which show that some supermarkets are:

- adopting corporate animal welfare policies;
- selling high numbers of eggs from non-caged birds;
- selling extensive amounts of organic chicken, meat and milk;
- selling products from systems where bedding is routinely used for animals;
- setting limits on transportation times.

These studies also considered farm assurance and other welfare schemes used by retailers and show that such schemes generally aim to improve welfare standards by working with retailers, farmers and others involved in the food industry. The standards usually cover the production of meat, poultry, eggs and dairy products through the processes of rearing, transport and slaughter. To take just one instance, the Freedom Foods approach established by the RSPCA in the UK in 1994 works to standards that ensure ‘five freedoms’:

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<sup>14</sup> A non-retailer led scheme is a category of quality assurance schemes, there are also retailer led schemes which will be discussed in future work. The term ‘quality assurance scheme’ is the public face of the ‘farm assurance scheme’ or group of ‘farm assurance schemes’. The name of the farm assurance scheme is often not known by the general public. But in other cases where it is a small quality assurance scheme then the farm assurance scheme and the quality assurance scheme may have the same name.

1. freedom from hunger and thirst;
2. freedom from discomfort;
3. freedom from pain, injury or disease;
4. freedom to express normal behaviour;
5. freedom from fear and distress.

This approach plays a key role in regulating the welfare-friendly food chain in the UK. This report will analyse the extent to which these welfare-friendly products are available across the study countries and within the main retail outlets. It will provide:

- an emerging picture of the ‘market’ for welfare-friendly animal-based food products found in main retail outlets in each of the countries;
- information on the assurance schemes adopted for these products.

This Task consisted of two Sub-tasks.

The specific objective of sub-task 1.2.2.1 was to provide a detailed list of selected welfare friendly animal based food products to be found in main retail outlets. The main retail outlets (~10 ) were surveyed. The products (< 300 per country) were catalogued with photographs made of each type. The findings of this Sub-task will inform work in WorkPackage 1 and 3, and the following stages of WorkPackage 2. It will allow a more in-depth understanding of the market for welfare friendly products to be gained. An integration meeting will permit initial information to be shared within clusters.

There were two objectives to the sub-task 1.2.2.2. These were to analyse non-retailer led labelling schemes that carry a welfare component and to interview key personnel involved in running the scheme. The non-retailer led labelling schemes that carry a welfare-component were assessed in order to provide an overview of this sector of the market. This ‘overview’ will also assist other WorkPackage groups. This Sub-task provided an evaluation of the non-retailer led labelling schemes that carry a welfare component in a range of retail outlets. An overview of these schemes in each study country allows detailed knowledge to be gained of the main means of marketing welfare-friendly products and the implications these schemes may have for the constitution of the market, thereby informing work in WP 1 and later stages of WP 2.

## COMPARATIVE OVERVIEW OF ANIMAL WELFARE CLAIMS

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In order to assess the presence of welfare-claims in the food market within the differing national contexts a 'retail audit' was undertaken. The audit sought to identify as broad a range as possible of labels and products, in order to analyse the marketing of welfare claims on product packaging. To identify what was a welfare claim we took a very broad, inclusive and context dependent perspective. This reflects how consumers perceive the claims made on product packaging and suggest better animal welfare, rather than a precise technical definition of better animal welfare. This was necessary because there is currently no clear, objective, technical definition of animal welfare exists. Thus, rather than artificially creating one, the research aimed at capturing as much variation in animal welfare claims as possible in each partner country.

For example, on an Italian meat product packet there is a statement saying it is GMO free; this is perceived as a welfare-claim. However, as Miele and Evans (2005) argue animal integrity<sup>15</sup> is a concern for consumers expressed in worries about genetically modified animals and foodstuffs. Products that appear in the audit can be broadly broken down into the three broad taxonomies based upon the origin of the labels:

- retailer is the origin of the brand carrying welfare-claims;
- food manufacturer is the origin of the brand carrying welfare-claims;
- independent producer labels is the origin of the brand carrying welfare-claims.

Following this taxonomic distinction of labels it is possible to give a sense of how the market within each country differs in terms of what sector of the food production industry is innovating and labelling welfare-friendly foodstuffs (see Table 10.1). It is important to note that the number of stores visited was limited and is in no way representative for the country as a whole.

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<sup>15</sup> Animal integrity is often used as an argument against de-beeking, tail-docking, genital-castration, de-horning and other forms of physical mutilation. Thus for consumers animal integrity is about preserving a sense of the animal's dignity in a holistic, bodily sense. However, this argument is increasingly being extended towards discussion of a genetic integrity that is used against genetic modification.

TABLE 10.1 A comparative overview of the distribution of animal welfare brands.

Country	Origin of AW brand		Retailer brand		Manufacturer brand		Total
	No. of products	% of products	No. of products	% of products	No. of products	% of products	No. of products
France	43	22	62	31	93	47	198
UK	12	10	53	44	56	46	121
Norway	7	6	2	2	106	92	115
Sweden	42	58	9	12	17	24	68
Italy	0	0	33	40	50	60	83
Netherlands	85	30	57	21	138	49	280

Source: data collected November 2004.

- UK The retail market in the UK is increasingly dominated by retailer brands. A few specialist producer labels exist, these tend to be quality products possibly organic which include animal welfare as a quality attribute.
- France The retail market in France is characterised by a growing number of retail brands but still dominant presence of manufacturers brands. Producer brands also strong; these producer brands emerge from small, fragmented regional-based cooperatives.
- Italy Manufacturers brands dominate with a growing number of retailer brands. Manufacturer brands are very strong in Italy, the retail sector is beginning to develop own-brand ranges where organic ranges feature which make welfare-claims.
- Netherlands. Manufacturers brands still dominate; but there is a growing number of retailer and producer brands. Producer brands are dominated by producers of the indoor free-range egg business which has taken off very successfully in Dutch retail stores.
- Sweden. Producer brands are dominant in the Swedish market for welfare-friendly foodstuff. The Swedish farming cooperatives pride themselves on having higher welfare standard than their international counterparts, thus it is not surprising that this sector is so dominant. However, retailer and manufacturer brands are growing in significance.
- Norway. There is a negligible amount of products with a specific reference to animal welfare, particularly in the soft discount stores (the leading store format in the country). Within the limited market there is strong presence of manufacturer brands. Very weak presence of retailer brands.

Within retail stores across all six countries there is wide variation in ways animal welfare is marketed (e.g. Freedom Food label, UK) or implicitly (See note 15).

In countries where welfare-friendly food products do have a presence it is often found as a component of retailer own-brand (or private-brand) products. For example in the UK, Italy and Netherlands, brand segmentation of retailer own-brand products is arguably increasing the number of products that carry welfare-friendly claims. In many cases animal welfare is part of an Organic own-brand product range since animal welfare results from some of the components of organic production schemes. However at the time of this audit there was no explicit segment of a retailers branding strategy that is focused on animal welfare. Nevertheless, there are retailers in the UK

(Marks&Spencers), France (Carrefour) and Sweden (Coop) who make welfare-specific claims about what is in the store and what is not. For instance the panel above the meat display in one of the Carrefour supermarkets surveyed in the Paris region stated:

‘Our engagement to French meat assures you that our butcher has selected French meat for its taste and quality. Carrefour’s farmers, abattoirs and butchers respect a number of conditions relating to:

- traceability from field to plate;
- good husbandry practice;
- feed which presents no risk to the animals;
- animal welfare;
- the preparation of meat.’

For M&S (UK) only free-range eggs are used in the production of own-branded food products; Coop in Sweden don’t sell Goose-Liver, Light calf’s veal or Belgium Blue meat. Since 2004, no battery eggs are sold in any supermarket in the Netherlands. The Coop in the UK have pledged to introduce over the next year assurance that all their own-brand animal-derived products will meet the RSPCA Freedom Food production scheme standard; at the time of writing this has yet to become a reality because of a difficult trading period (Coop, 2005, pers. comm.). In Norway and Sweden there is less predominance of retailer own-brands dominating the lists of welfare-friendly food products. Instead producer and manufacturers brands hold a stronger position.

The type of products that get labelled welfare-friendly are often un-processed goods like fresh meat products. The manufactured products that often carry labels are milk, cheese and bacon. There is a significant presence in all countries of manufactured goods. Manufactured goods are those where there is some off-farm processing of the product before it reaches the shop-shelf, for example milk, bacon, sausages, and cheese. However the taxonomy of origins of welfare brand does not completely overlap with this definition of manufactured goods, since some manufactured goods may originate from either a retailer or producer brand. Retailers privilege or adopt ‘free-range’ labelling more specifically for chickens and hens, than other animal species. The term ‘free-range’ is popularly used to label chickens and hen’s eggs and in other countries (Norway, Sweden and UK), this term is being applied to some pork products. In the Netherlands the term ‘scharrel’ is used which means something similar to free-range, except for eggs it means ‘barn eggs’ and its usage on pork products is rare to find but when found denotes that the pig has been ‘outdoor reared’ (certification by PROduCERT). Beef and milk products, with the exception of organic ranges, rarely carry any welfare-friendly product description.

There are four categories of welfare marketing, specific to products in-store that carry animal welfare claims on packaging, in which retailers can be placed. The table shows a continuum of where the highest to the lowest number of products can be found that carry welfare-claims. The continuum moves from left to right, where the highest number of welfare-friendly products are found to those that fall in the column to the far right having none. The movement across the continuum from more to less welfare-friendly products is defined by the following categories – welfare focused; organic, less explicit welfare; quality and welfare; rare to find welfare or none. (see Table 10.2).

TABLE 10.2 Four categories of welfare marketing characteristics, specific to products in-store that carry animal welfare claims on packaging, for different retailers in different countries.

Type of claims	Welfare focused strategies in marketing of quality	Organic, less explicit welfare.	Quality and welfare	Rare to find welfare or none.
Country				
UK	Marks & Spencers, Waitrose, Sainsbury, Fresh 'n' Wild,	Organic Supermarket, Independents.	Tesco, Somerfield, Morrisons,	Coop,* Asda, Farmer's market, Lidl
Italy	Esselunga, Coop, Conad,	Natura Si	Despar, Proda, Sigma, Standa, GS-Carrefour	Lidl
France		Rayon Vert	Carrefour, Auchan, Casino, System U, Monopix, Leclerc, intermarche	Lidl, Ed
Sweden	Hemkop, ICA Malmsborgs, ICA, Coop Forum/Hypermarket, Coop Konsum/convenience store		Citygross/Hypermarket, Maxi ICA/Hypermarket, AGS/Supermarket,	Willys,
Netherlands	Albert Heijn, Konmar, PLUS, Super de Boer	Natuurwinkel (The NatureShop)	C1000, Edah	Aldi, Lidl
Norway		Helios	Ultra, Centra, Meny, ICA Maxi, ICA supermarket, Coop Obs, Coop Prix, Coop Mega, Meny Champion, Smart Club	Rimi, REMA1000, Kiwi, Joker

*Source:* data collected November 2004.

*Note:* Despite the Coop UK's pioneering support for the Freedom Food standard a remarkably low number of these products were found in two stores visited in Cardiff and Bristol. This may be due to different stores having discretion to stock different products or as I suggested earlier they have found it hard to make a full commitment to Freedom Food on the shop floor, despite intentions.

This table indicates which retailers sell products that use animal welfare as an explicit marketing strategy on the product's packaging. We are not arguing here that some retailers have more welfare-friendly food products than others, because there are alternative marketing strategies that have not been covered in this research phase. Instead we are drawing attention to the scale and style of visible welfare-claims on product packaging within different retail outlets.

Nevertheless, the table does indicate that there are animal welfare leaders.

1. Specific types of retailer are shelving specific animal welfare brands e.g. M&S, Waitrose, Italy Coop, Albert Heijn.
2. Some of the main international chains (e.g. Tesco and Carrefour) tend to 'bundle' animal welfare with other quality criteria.
3. Some national more specialist retailers bundle animal welfare with organics – e.g. Fresh 'n' Wild, Natura Si.

4. A clear pattern is that discounter stores, ASDA/Walmart, Lidl, Aldi, do not use animal welfare brands. Coop UK is now considered as an anomaly in the ‘rare to find welfare’ since its policy has changed in 2005 and would likely now fit in the ‘welfare focused’ column if the research was repeated a year later.

10.1 THE PRESENCE OF DIFFERENT ANIMAL SPECIES IN THE MARKET FOR WELFARE-FRIENDLY FOODSTUFF

The Welfare Quality project is studying only pigs, cattle and chickens. These species can be discussed in terms of five different food product typologies – pork meat, beef meat, chicken meat, hens eggs’ and dairy cow products (milk, cheese, yoghurt). What is noticeable from the survey of the market for welfare-friendly products is that these different animal species are characterised differently in the market and this affects their visible participation in the market, understood through welfare-claims made on product packaging. Table 10.3 illustrates how different animal-based product types are present at different levels within the market for products that carry welfare-claims. Due to the small size of the market, arguably some of the markets are dominated by products coming out of one or two manufacturing companies. For example in Norway the market is dominated by products from Tine and Nordgården, who produce dairy and egg products, respectively. However, in addition the different cultures around both the animal and the product it creates, leads to a differentiated approach to the welfare-claims attached to the animal species that are both at times similar and different between countries.

TABLE 10.3 Percentage of different animal-based product types present in the market of products that carry welfare-claims.

Food product typology	Pork		Eggs		Dairy		Beef		Chicken		Combination products	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Country												
UK	18	23	20	25	18	23	7	9	12	15	4	5
Netherlands	46	18	74	30	88	35	32	13	6	2	4	2
Sweden	18	27	15	23	11	17	8	12	6	9	8	12
Norway	7	7	20	20	55	55	8	8	9	9	–	–
Italy	1	1	20	26	29	38	5	6	22	29	–	–
France	60	18	47	14	75	22	112	33	47	14	–	–
Total	150	16	196	23	276	32	172	17	102	15	16	3

(% = average)

Generally, the type of welfare-friendly food products one finds most frequently available in most of the multiple retailers across the six study countries are eggs and dairy products, that carry welfare-claims (See Table 10.3 and Figure 10.1). However the style of welfare-claims differs. For example, organic dairy and meat products are often found carrying welfare-claims but these rarely make any explicit reference to any

animal welfare component, instead welfare-claims are implicit through other claims made on the product. Whereas eggs are very frequently labelled as ‘free-range’, an explicit description about the conditions in which the animal lived. The descriptive term ‘free-range’ is successfully used as a marketing term for chicken, egg and also for pig production. For the majority of consumers free-range, which implies ‘outdoor access’, has strong associations of a better life for the animal (Miele and Evans, 2005). In the Netherlands the term ‘Scharrel’ is used on eggs implying outdoor access, but in fact these are barn eggs. However for cattle who have traditionally been represented as free-ranging in fields, this term is never used for beef or dairy products, despite the fact that indoor housing is normal for nearly all cattle at sometime in their life, particularly in climes where there are extremes of temperature.

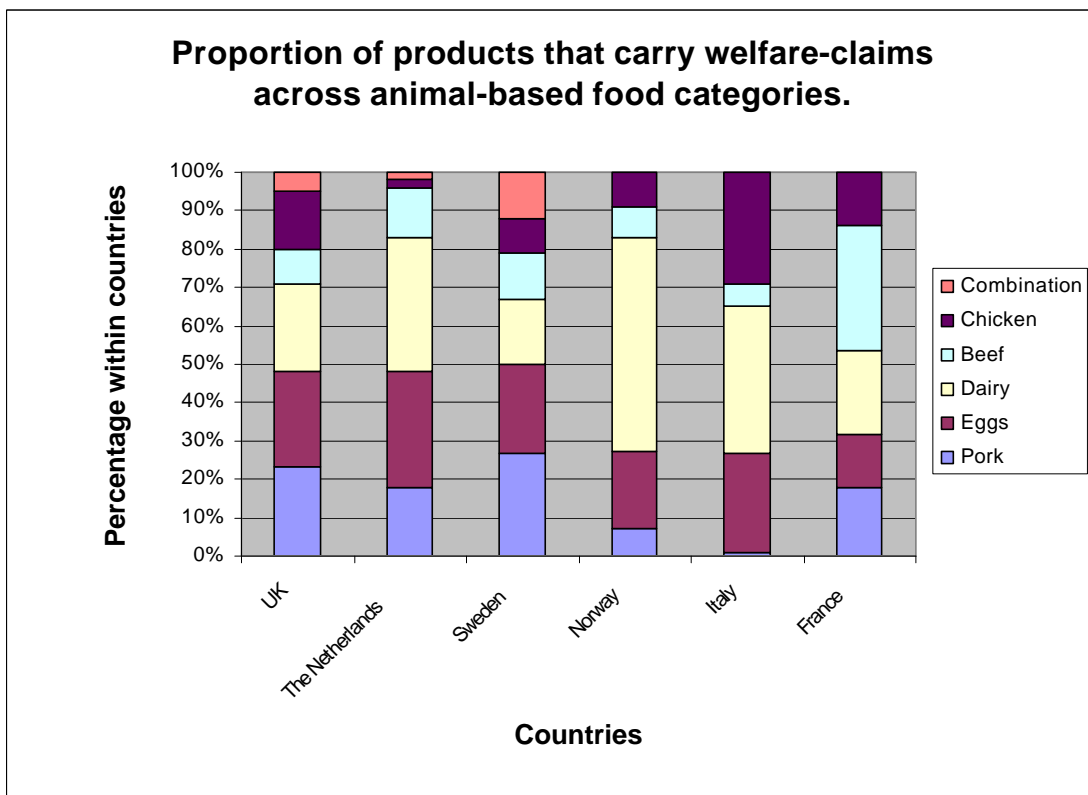


FIGURE 10.1 Proportion of products that carry welfare-claims across animal-based food categories.

*Beef*

These are some illustrative examples of welfare-claims found on beef packaging in the six countries.

“Organic husbandry: feed of fodder and cereals from organic sources, veterinary sources predominantly homeopathic and plant based, respecting the natural needs and welfare of the animals.” FRANCE

“Enjoy a well tasting beef from a beautiful countryside” SWEDEN

“Our beef is carefully reared and matured.” UK

“The animals graze outside and the calf gets milk from the cow in an important period for the animal’s growth and development.” NORWAY

“This race is reared using traditional methods and in green pastures away from pollution, which are essential factors for the production of lean meat with strong organoleptic characteristics.” ITALY

“Honest and pure. Animal friendly. Naturally appetizing” NETHERLANDS

### *Dairy*

In the case of dairy cattle, the quality of the pasture is often used to convey a better quality of life for the cow. Cows, as described on many welfare-friendly packet descriptions, are constructed as receiving extra care and attention in a welfare-friendlier production system. There is an absence of welfare-friendly cheese in almost the entire retail field.

“all our cows must eat healthily, exercise regularly, no late night movies and no petting behind the barn” UK

“Fabrication following traditional methods, milk carefully selected from farmers who respect good practices in husbandry and in feeding their cows.” FRANCE

“Ecological” SWEDEN

“Do you know what organic means? Our organic milk comes from nature, from farms where animals live on grass and clover, without any additives” NORWAY

“..full fat milk comes from cows reared in the European Union using organic methods to guarantee the well-being of the animal, govern the veterinary treatments and ensure feeding using raw materials from organic farming sources. Organic products are obtained without the use of GM products and/or derivatives.” ITALY

“Tastes perfect. Straight from the farm” NETHERLANDS

### *Pork*

There are two popular marketing slogans for pork, they are free-range or outdoor reared. The slogan ‘outdoor reared’ is used in the UK pork market, but is not used in this way in other countries. It is clear on some packages that outdoor reared actually means that they are outdoors when they are young but are put inside barns as they get older, whereas on others this is not so clearly explained. The increasing visibility of pigs in fields is arguably helping the publicity of this production system within the UK. The notion of ‘free range pigs’ is only found in the UK, Norway, Sweden and the Netherlands. There is a negligible level of welfare-friendly pork in Italy, which possibly implies there is a different culture around the pig than in the other study countries.

*Free range pigs*

“Healthy and happy pigs” SWEDEN

“spend their lives outside in family groups and have warm shelters and straw bedding to provide shelter in the winter and shade in the summer”. UK

“Free Range – A happy pig” NORWAY

“Animal friendly (broad housing, outdoor free range) + sustainable agriculture + healthy of taste + naturally safe” NETHERLANDS

“Pigs in fresh air; fed a minimum of 75 per cent cereals and grown for at least 27 weeks” FRANCE

*Outdoor reared pigs*

“We have selected number of Yorkshire farms where our pigs are reared outdoors with access to open fields and shelter. As they grow, the pigs live in large barns with deep straw bedding”. UK

“This meat comes from farms that respect the EC regulations on organic farming. The animals are reared in large open spaces and are fed on organic forage and cereals that, in accordance with the production specifications, do not use GM ingredients” ITALY

When one compares the three animal species it is interesting to consider how their package descriptions capitalise on particular socio-cultural constructions of nature and farming. We can see this in the success of the descriptive term ‘free-range’. It is a marketing term which encapsulates a strong image that satisfies an appetite for traditional, rural, wild idyllic scenes, successfully used for some time on egg boxes. Perhaps beef is currently disadvantaged in marketing it as welfare-friendly because this term cannot be applied; Table 10.3 and Figure 10.1 shows that with exception to France, beef products make up around 10 per cent or less of the welfare-friendly product market. In addition to the term ‘free-range’, egg boxes often supply additional description about the hen’s lifestyle.

*Hens*

“Purpose built houses are used, with sun and wind harnessed as a natural energy source whenever possible. These units are moved around the paddock to rotate the pasture in their vicinity. Inside the house natural bedding and scratching materials encourage preening and dust bathing. The hens forage during daylight hours in open organic pastures. The flocks are fed on a natural organic diet containing no artificial yolk colourants” UK

“From free-range hens. They benefit from “more natural” food sources (at least 60 per cent cereals), different from battery hens” FRANCE

“From free range indoor hens” SWEDEN

“If animal welfare is important” NORWAY

“Quality-fresh-tasteful. Fed with pure grains: corn, wheat, barley & rye.” NETHERLANDS

“From open-air farms. Not cage-reared. There are no cages in nature. Eggs from open-air farms come from small chicken farms where the animals range in large open spaces (at least 4 square metres per hen). The passion for the animals’ well-

being, the limited production and the respect for the strictest hygiene standards in all production phases ensure the high quality of these eggs.” ITALY

### *Chickens*

“The Devonshire Red™ is a slow growing chicken that has been specially selected for our West Country Free Range Chicken. They are reared using traditional farming methods on small West Country, family run farms. They have access to tree-planted fields, which encourages them to roam and show natural foraging behavior such as scratching, preening and dust bathing. This allows the chicken to live a fuller, more active and enriched life. The combination of the traditional breed, West Country Free Range farming methods and their natural diet produces tasty, succulent meat rich in flavour”. UK

“The chickens enjoy the uninterrupted possibility of total free range in the fresh air during the day” FRANCE

“Ecological” SWEDEN

“Reared on vegetal feed with corn” NORWAY

“Ground-reared chicken” ITALY

“With free outdoor range. From a safe quality chain. Farmers from Loue.” NETHERLANDS (imported from France)

It is interesting to consider whether there are any noticeable differences in how the products of hens and chickens are marketed. Does the marketing of chicken meat as opposed to hen eggs lead to different packaging descriptions? Both are using the term ‘free-range’, yet the publicity around caged hens has led to commentary on the absence of cages in the description on egg packaging. The issue of space, which has led to the development of the free-range hen system, has not been made an issue to the same degree for broiler chickens. Within a broiler chicken system many of the welfare concerns are to do with the breed of the bird and the stress to the bird’s body as it gets larger. This is an issue which has attracted less press attention. Although there is some indication that the broiler chicken breed is becoming a concern for some as it becomes part of the product description. There is less development of the welfare-friendly chicken market in Norway, Sweden and the Netherlands. It is particularly interesting that free-range chicken is currently under-developed in the Dutch market, despite their success of barn eggs. The success of barn eggs can be explained from both an ethical and an economical perspective. Retailer prices of eggs are simply determined by adding 100 per cent margin. There are no substitutes for eggs. If the price of the eggs is increased (i.e. going from battery cage to barn), sales will not drop because there is no alternative and the retailer increases their profit provided that all supermarkets in the country/region follow this strategy while at the same time the retailer improves their sustainable and ethical image.



## WELFARE BUNDLING ON PACKAGING

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The welfare-friendly food market across the six countries appears very diverse and confusing with lots of different approaches taken by the retailers/manufacturers/producers. There is a range of products across the six countries that make welfare-claims, but there is little consistent information about what these mean comparatively in terms of the level of improvement in an animal's life. Products are packaged and marketed very differently. Some have just a single statement for example 'If animal welfare is important' by the Norwegian producer Nordgarden. Others make statements related to how the animal has lived, for example 'From free-range indoor hens' used by a number of egg companies across Europe. Whereas others bundle animal welfare in with a number of other attractive product attributes including:

- animal health;
- animal well-being;
- ecological embeddedness;
- sociological embeddedness;
- human health;
- quality/taste.

Below is an example that includes all these attributes.

"The Devonshire Red™ is a slow growing chicken that has been specially selected for our West Country Free Range Chicken. They are reared using traditional farming methods on small West Country, family run farms. They have access to tree-planted fields, which encourages them to roam and show natural foraging behavior such as scratching, preening and dust bathing. This allows the chicken to live a fuller, more active and enriched life. The combination of the traditional breed, West Country Free Range farming methods and their natural diet produces tasty, succulent meat rich in flavour". Sainsbury's Taste the Difference Fresh West Country free range boneless chicken breasts (UK).

In comparison a Swedish Kronfågel chicken product just carries the words 'Swedish chicken'. This conveys a welfare-claim because Swedes know that Swedish animal welfare regulation is higher so implicitly this product has good animal welfare. This difference between the two labelling strategies illustrates one of the key differences in

the market for welfare-friendly food products that is a result of different institutional and cultural settings. The high national standards for animal welfare in Sweden have led to animal welfare becoming not just a non-competitive issue but also a non-issue in Sweden. Therefore few products carry welfare-claims. In contrast in the UK animal welfare is a competitive issue both between retailers and between products on the shelf. Product-tiering and brand segmentation has led to welfare-claims being actively used to create a range of products marketed at different quality levels on own-brand products and independent brands. Animal welfare is expressed on packagings in ways which suggest an increase of time and space, which leads to a higher quality product, for example the Devonshire Red™ packaging above. Words which speak of giving more time, more space suggests a higher quality; in addition the different quality criteria's of 'free-range' and 'organic' also imply that more time and space is a central tenet to these production systems. This creates a sense of a de-intensification of animal production. The increasing intensification of agriculture has attracted a lot of critical attention and has been linked to the rise in animal disease, poor quality foodstuffs and the spread of zoonoses. The direct communication of animal welfare is often framed in these terms as the examples below and above illustrate.

Table 11.1 presents some examples of different bundles of welfare-claims with other quality attributes.

**TABLE 11.1 Bundles of welfare-claims and other quality attributes**

*Animal health and animal well-being*

“Organic husbandry: feed of fodder and cereals from organic sources, veterinary sources predominantly homeopathic and plant based, respecting the natural needs and welfare of the animals.” FRANCE Beef (Auchan viande Haché Bio)

“All our cows must eat healthily, exercise regularly, no late night movies and no petting behind the barn” UK Dairy (Organic Calon Wen butter)

*Ecological embeddedness and animal well-being*

“Ecological.” SWEDEN Pork (Onsala Pork Sausage)

“Do you know what organic means? Our organic milk comes naturally, from farms where animals live on grass and clover, without any additives” NORWAY Dairy (Tine Organic Milk)

*Animal health, animal well-being and human health*

“... full fat milk comes from cows reared in the European Union using organic methods to guarantee the well-being of the animal, govern the veterinary treatments and ensure feeding using raw materials from organic farming sources. Organic products are obtained without the use of GM products and/or derivatives.” ITALY Dairy (Esselunga Bio milk)

*Animal well-being, ecological embeddedness, quality/taste and human health*

“Animal friendly (broad housing, outdoor free range) + sustainable agriculture + healthy of taste + naturally safe” NETHERLANDS Pork (Konmar Bio+ Bacon Strips)

This draws us to consider the increasingly competitive marketing and packaging strategies that the major retailers are involved in. The major supermarkets increasingly own significant parts of the vertical meat supply structure and therefore have full

control over how the product is packaged. The number of *retailer own-brand* meat and dairy products that feature in this market audit is high, up to a third in some countries. This allows the major retailers to be involved in using their own brand characteristics to shape the marketing of the product. *Manufacturers are major labellers* of welfare-friendly food products in all countries. Although the influence they hold in some countries, such as France and Norway, is greater than in others. Therefore in some countries like the UK the manufacturers struggle to get their products in the major retailer assortment whereas in Norway, where there is few independent manufacturers to produce private retailer branded food products, and the farmer cooperatives' branded goods hold monopolistic market shares, this has influenced to date the possibility for Norwegian retailers to develop their own-brands. The independent producers/manufacturers such as Duchy Originals (UK) or Sodial with their Candia 'Route du Lait' milk (France) often carry a considerable amount of information that is only available to the customer once they have made the purchase, i.e. it is found on the underside of the cardboard label or on the website. This is a particular marketing strategy that seeks to communicate to the consumer in a more intimate, specialised channel after the product has been bought. In Norway and Sweden, producer-labelled welfare-friendly products have a particularly high profile. This is as a result of the producer cooperatives which have played a dominant part in the food market in these countries. The high profile of producer-labelled products suggests that the types of welfare-friendly food products available in these countries is dominated by fresh, unprocessed meat products or eggs.

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## 11.1 RETAILER OWN-BRAND MARKET SEGMENTATION

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The ultimate own-brand retailer is Marks and Spencer's in the UK. The UK based supermarket food retailer pioneered own-label food. Following in the success of the St Michael brand, other large supermarket chains across Europe have created their own brands.

'Supermarkets love the idea of building up default loyalty to their brand, a kneejerk responses that doesn't enquire too much about where the product comes from and how it was produced: a 'take our word for it' concept of quality.'  
(Blythman 262-3: 2004)

In the last couple of years some of the major European retailers (Carrefour, Tesco, Monoprix, Esselunga, Coop) have moved away from a sole focus on price-fighting own-brand ranges. 'Product-tiering' has becoming a popular shelving strategy; this means offering a selection of products that convey different levels of quality or value-added attributes. Within this product-tiering animal welfare can feature in the higher quality, value-added ranges. This product-tiering may not only be carried out within own-brand ranges, but may also include other brands. It is strategy for managing the category to both persuade consumers to buy something more expensive, where the

profit margins are higher, and it also enables the own-brand ranges to cover all possible quality levels. It is often managed by a ‘category captain’, which may be the manufacturing supply company behind the own-brand range products on sale, and which may also include some private brands owned by this same company. It is possible to find some products which are not produced by this manufacturing company but they would have to be products with a known, high-level of sales. Typically, an own-label will offer a high-quality, standard and a budget or price-fighting range, in this way quality, at all levels, is introduced as a marketing instrument. This process is otherwise known as ‘value engineering’, an industry term for looking at ways to use cheaper ingredients (Blythman, 2004). The products found in our study that were branded ‘own label’ were found within a range of different quality categories.

For example:

Esselunga Naturama (Italy)	Esselunga Bio (Italy)
Carrefour Filière de Qualité (France)	Carrefour Bio (France)
Auchan Filière (France)	Leclerc ‘Marque Repere’ (France)
Monoprix ‘Bio’ (France)	Monoprix Les ‘Vitelliers’ (France)
Auchan ‘Bio’ (France)	Casino ‘Terre et Savoir (France)
Monprix Label Rouge (France)	ICA (Sweden)
SUNDA (ICA) (Sweden)	Coop Änglamark (Sweden)
Coop Organic (UK)	Coop Premium (UK)
Waitrose (UK)	Waitrose Select farm (UK)
Waitrose Organic (UK)	AH (Netherlands)
AH Biologisch (Netherlands)	Super de Boer Biologisch (Netherlands)
Coop Natur (Norway)	

The retailers tailor their marketing and packaging strategies for the own-label products to suit their own brand. ‘The brand emerges as the organisation of a set of relations between products or services’ (Lury, 2004:26). The brand organises the exchange between producers, retailers and consumers. Some supermarket and independent brands choose to make the political and ethical intervention to provide detailed information about what a better life for animals consists of, or to just mention it as a concern in the production of their food. The reasons for variations in this strategy are variations in the consistency of different retailer brands, some want to reflect an openness and to acknowledge that consumers want to be informed, whereas others respect/create consumers that do not want to know. Those retailers that just use ‘free-range’ as a marketing label and do not provide any further details do that because it is part of their brand strategy; these brands create a low information identity, attractive to some consumers, unattractive to others.

The retailers use different approaches for how animal welfare is marketed on their own-label products. Some provide extensive information, whereas others very little.

‘Honest and pure. Animal friendly. Naturally appetising’.

The widespread use of the term animal welfare on a large number of Sainsbury’s (UK) own-brand dairy and meat products can be understood as an important component of the Sainsbury brand. The brand communicates directly about the provenance of the food

they sell. Similarly, the Charal brand in France typically includes a statement that includes the phrase: ‘the respecting of several criteria including welfare and hygiene of animals’. Understanding how the brand structures relations and thus practical behaviour and discourse around products leads Celia Lury to understand brands as performative (2004). Brands are active agents in the relations that are made and remade between consumers and producers, and increasingly the relations between consumers and retailers as the own-brand movement displaces the visibility of the independent producer, contracted to a retailer, in the food network.

In other countries additional ‘quality’ labels are significant in communicating trust to the consumer. Whereas in the UK there has been a move towards reducing both in size and number the additional logos and labels on retailer own-brand products, in other countries the role of ‘quality’ labels still have a significant role. Hence in France, the State regulated Label Rouge (Red Label) scheme provides a framework for a wide range of ‘quality’ food products that identify animal welfare considerations as a component of their differential production strategies. These Label Rouge products may be sold in supermakets under their own producer/manufacture label or may be incorporated into supermarkets’ own labelling schemes. Thus food items such as those sold under the ‘Monoprix Gourmet’ label also include reference to their status as Label Rouge products. The huge variation and complexity in how welfare is communicated to consumers is a reflection on the number of different brands, independent and retailer-brand, operating within the welfare-friendly market. Drawing a connection between the farm assurance scheme, the production standard and the description on the packet of many of these products is difficult. In all countries there are significant number of products which carry production standard marks, and in some cases up to a half which don’t carry a recognised production standard mark. This leads to the thought that while some are being opportunistic another significant proportion may well meet the same production standard choose not to market the welfare-friendliness of the product, choosing to focus on something else. Or another explanation is that the paucity of products that carried a recognised high animal welfare production standard (organic being the most ubiquitous across all countries) reflects that the use of the term animal welfare-friendly, free-range or outdoor reared are applied to a range of actual levels of animal welfare. It is not clear to the consumer how some of these products that advertise a welfare-friendly component map onto recognised welfare standards. In the Netherlands, the majority of meat products (up to 95 per cent) come from certified chains (i.e. IKB), yet this is not used as a label for consumers.

A large number of meat products do not feature in this audit because on the packaging the quality of the cooking or the eating experience is used as a marketing tool as opposed to the life of the animal from which the meat came. Within some product lines there seemed no relationship between meat products that carried writing on the package which mentioned welfare and those that did not. Are retailers divided, confused, unsure as to whether animal welfare is a viable marketing tool? It certainly is apparent that for the overwhelming majority of meat products in all countries, if there is a product description, it is more often quality rather than animal welfare that comes first. Although of course there are exceptions, most notably Waitrose (UK), Coop (Sweden), Albert Heijn (Netherlands) where animal welfare has a role, above the average, in how it is used as a component of these retailers’ branding strategy.

This discussion leads us to consider the second sub-deliverable: a study of the non-retailer led labelling schemes. As was argued in this final section it is easy to see that the relationship between standards, labels and the marketing of welfare-friendly food products is not simple. To increase understanding for the market for welfare-friendly foodstuffs more is needed to be understood about the non-retailer led labelling schemes or the quality or assurance label schemes which are not the responsibilities of the major retailers. There are some retailers which have their own assurance schemes; these are not the focus of the following analysis. Thus the discussion moves on to analyse and compare the non-retailer led schemes that make claims about being welfare-friendly.

# COMPARATIVE ANALYSIS OF NON-RETAILER LED SCHEMES OF PRODUCTION

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## 12.1 IDENTIFICATION OF SCHEMES

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An interview-based study of ‘non-retailer led labelling schemes’ was carried out in the six study countries. The study was driven by two selection criteria. Firstly, the products surveyed were identified in the retailer audit (Deliverable 1.7). Secondly, non-retailer schemes were selected within each country that covered a range of non-retailer actors involved in labelling food products. Non-retailer led labelling schemes are those assurance schemes which both communicate directly to consumers in the form of a logo/label on packaging and which are the initiative of non-retailing bodies e.g. NGOs, producers, manufacturers. The schemes identified are operated by, or were established by the following range of non-retail actors:

- non-governmental organisations (NGOs)'
- food manufacturers;
- producer groups;
- joint producer/manufacturer groups;
- product boards;
- regional state bodies;
- national state bodies.

Importantly, in some cases a certification wing of the scheme’s body carries out the inspection or auditing process, for others an independent body carries out the inspection, which may or may not be mandated by the State. The aims of this study were to understand which institutions are powerful market actors in communicating animal welfare-claims to consumers across the study countries? Also, how have the schemes developed? Finally, how significant are these schemes to the existence of a market for welfare-friendly food products?

## 12.2 SURVEY RESULTS

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Table 12.1 gives an overview of the schemes studied in each of the six countries. It is important to note that there are many more schemes than are discussed here for the countries of Italy, France, and the Netherlands. For these countries the schemes discussed are just examples of a significant number of different competing labelling schemes that exist in multiple forms specific to a region, a product group or a producer group brand. Whereas in the UK, Sweden and Norway a far smaller number of schemes exist and this study has therefore been able to provide a near comprehensive picture of non-retailer led labelling schemes which carry a welfare component, which would have been impossible to do for the other three countries.

Figure 12.1 provides a picture of how different schemes are pitched in a framework of different standards of animal welfare. Additionally it is important to note that the remit of this research exercise was to study those schemes that make claims related to animal welfare on the food packaging. Therefore this report both attempts to give an overview of the different standards for animal welfare within which claims about welfare-friendliness are explicitly made, but it also mentions some schemes which are significant in terms of understanding the overall picture of standards at a comparative country basis but which do not make claims on packaging about animal welfare. The fact that some schemes which are of an equal standard level to those in other countries which do make claims, do not make claims, is connected to the different cultures surrounding issues to do with animal welfare between these countries.

The main points that can be drawn from Table 12.1 and Figure 12.1 are the following.

- The industrial sector in all countries is responsible for most of the non-retailer led schemes. This is most striking in France and Italy where the fragmented nature of the market leads to a plethora of schemes.
- Organic schemes have a major role to play in the market for welfare-friendly products because organic products must legally state on the product which certification scheme they belong to. Thus organic schemes are very visible in the market for welfare-friendly products.
- The bundling of welfare into quality reveals a number of quality labelling schemes to be significant within the market, particularly in France and Italy.
- NGOs are very involved in the promotion of welfare-claims in the UK and Netherlands.
- State-led schemes are found in Sweden and Italy.
- In Norway there are a number of schemes which are joint initiatives between NGOs, producers and manufacturers.

TABLE 12.1 Schemes studied in six countries.

Country	Standard Level	NGO, manufacturer, producer group, trade association	Name of the programme in the industry	Consumer Label name and Product examples where applicable
Norway	Comparable to EurepGap standard	Joint initiative by agricultural authorities, the farmers' organisation and the farmers cooperatives. Financed to a large extent by Annual Agreement between the Agricultural authorities and the Farmers organisation. Levy on products. No label.	KSL (Norwegian quality system for agriculture)	NONE
Norway	KSL standard	Owned and administered by Matmerk (The Norwegian food branding foundation) Marketing strategy for KSL?	Godt Norsk (Norwegian Quality)	Godt Norsk
Norway	EU regulations (2081/92 and 2082/92) on Protected Designation of Origin (PDO), Protected Geographical Indication (PGI) and Traditional Speciality Guaranteed (TSG)	Owned and administered by Matmerk (The Norwegian food branding foundation). Financial support administered through Quality Food Production in Norway programme.	Beskyttede Betegnelser (Protected Designation of Origin)	Beskyttede Betegnelser
Norway	Slightly higher than KSL standard	Owned and administered by Matmerk (The Norwegian food branding foundation) Additional standards to Godt Norsk	Spesialitet-merke (Speciality-label)	Spesialitet-merke
Norway	Norwegian regulation on ecological production. Currently being revised to EU-regulations (2092/91). In process of IFOAM accreditation.	Private owned (stakeholders in agro-food chain) agency, delegated to role by Min of Agric and Norwegian food safety authority. With several labels, only one -merket ( -label) is relevant for Animal Welfare. Subsidised by the state.	Debio (Norwegian certification organisation for organic and bio-dynamic production). Not marketed as Animal welfare label.	Ø-merket
Italy	Integrated production techniques. The code of practices are defined at regional level by ARSIA. Compliance with AW standards as defined in the Fishler Reform	Regional collective brand for products product by dell'agricoltura integrata. Regional Publically funded. Tuscany	Agriqualità (white butterfly) label	Agriqualità
Italy	EU agricultural guidelines with emphasis on agri-environmental measures.	Regional public funded Emilia Romagna	Qualità Controllata label	Qualità Controllata

TABLE 12.1 Schemes studied in six countries. (cont.)

Country	Standard Level	NGO, manufacturer, producer group, trade association	Name of the programme in the industry	Consumer Label name and Product examples where applicable
Italy	EU and Italian standards with additional Legambiente rules that are environmentally and ethically sound.	Environmental organisation set up label and also LAIQ. LAIQ privately-funded.	Legambiente (league for the environment) label dual-branded with LAIQ (high quality Italian agriculture) logo)	Legambiente /LAIQ Latte Italiano srl (milk) Minerva-Agridea (meat)
Italy	EU and Italian standards with additional rules producing quality meat.	Asprocarne Piemonte Beef Producers' organisation	'Carni bovine certificate' (beef quality and consumer protection Reg Law no.35 1988) and 'Dono di natura' (quality beef EEC reg. 1318/93) label	'Carni bovine certificate' 'Dono di natura'
Italy	EU and Italian standards with additional rules about protecting natural resources, integrating production with the countryside and animal wellbeing.	Unicarve–Beef Producers' Association of the Triveneto Region.	Eletta label (voluntary labelling)	Eletta
Sweden	Programme of LRF (Swedish Farmers Association). Swedish slaughter houses. Swedish Poultry, Swedish egg	Producer-owned	MHS (Swedish farmers environmental house inspection) self-regulated. Base-level assurance scheme.	MHS
Sweden	Svensk Fagel The Swedish Poultry meat association	Producer-owned	Svensk Fagel	Svensk Fagel
Sweden	Svensk Mjolk (Swedish Dairy Association)	Producer-owned	Frisk Ko (Healthy Cow)	Frisk Ko (Healthy Cow)
Sweden	Svenska Agg (Swedish Egg) On top of MHS-scheme	Producer-owned	Svenska Agg	Svenska Agg
Sweden	BIS (Swedish Meats) –pig producers BAS (Swedish Meats)	Producer Owned	Swedish Meats welfare programme (Promoted by Swedish Meat Information)	'Scan' store label brand
Sweden	KRAV. IFOAM member	Producer-owned	KRAV (independent quality assurance scheme)	KRAV
Sweden	Demeter IFOAM Member	Producer-owned	Demeter	Demeter
Sweden	Swedish Poultry Meat Association	Ingelsta Kalkon – manufacturer	SPMA quality assurance programme	Ingelsta Turkeys
Sweden	SEMKO-DEKRA Certification AB. Developing criteria for dairy, beef and pork.	Producer and manufacturer owned (LRF – Federation of Swedish Farmers). Environmental –quality assurance scheme.	Swedish Seal Quality System	Swedish Seal
Sweden	Treras (basic demands)	Manufacturing company-owned	Parsons (processed meat)	Parsons

TABLE 12.1 Schemes studied in six countries. (cont.)

Country	Standard Level	NGO, manufacturer, producer group, trade association	Name of the programme in the industry	Consumer Label name and Product examples where applicable
France	“Fermier Label Rouge” – a food quality government run Quality Assurance scheme for pig production with standards set and monitored by French Ministry of Agriculture, over and above baseline national and EU standards. Specific AW requirements relate to outdoor rearing and living and bedding material	Producer Group. BEVICOR Cert. by French Ministry of Agric. Controlled by 2 technical control institutes.	‘Porc Fermier’ en ‘Plein Air’, ‘Fermier’ and ‘Label Rouge’	Porc Fermier en Plein Air du Limousin, Label Rouge
France	Based upon EU organic certification and upon higher level IFOAM principles with additional criteria added by the NGO Nature et Progress	NGO Nature et Progress	Nature et Progress. (around 2/3rds of producers have organic certification and 1/3rd do not)	Mention Nature et Progress
Country	Standard Level	NGO, manufacturer, producer group, trade association	Name of the programme in the industry	Consumer Label name and Product examples where applicable
France	EU regulation, French ‘Label Rouge standards, operated by the Ministry of Agriculture. Low level AW criteria relating to feed and animal housing over and above minimal legal requirements	Producer Group (Loué). Cert. by French Ministry of Agric. Controlled by 2 technical control institutes.	Vollailles de Loué (Label Rouge)	Vollailles du Loué (Label Rouge)
France	EU regulation plus higher level production quality criteria as part of the Appellation d’Origine Controlée regulations, over and above min. legal requirements. Implicit rather than explicit AW requirements relate to animal feeding and bedding.	Producer Group and cooperative	Beaufort Cheese AOC (Designation of Protected Origin)	Beaufort Cheese AOC
France	Base level conformity to industry standard quality assurance scheme (CCP)	Manufacturer Sodiaal	Candia La Route du Lait	La Route du Lait
Netherlands	EU regulation with special regulations	Product Board started scheme. IKB-free range egg system	IKB-Scharrel	Scharrel Eggs
Netherlands	EU regulation which has followed 91/629/EC directive banning individual pens	Producer Alpuro – market oriented branding concept	Group Grown veal- Peter’s Farm	Peter’s Farm

TABLE 12.1 Schemes studied in six countries. (cont.)

Country	Standard Level	NGO, manufacturer, producer group, trade association	Name of the programme in the industry	Consumer Label name and Product examples where applicable
Netherlands	EU regulation which has followed 91/629/EC directive banning individual pens	Producer VanDrie Group – ethically oriented	Group Grown veal –VanDrie Group (producer name)	VanDrie Group
Netherlands	EU organic standard 2092/91	SKAL - NGO set up to regulate organic production	EKO	EKO: found on all NL organic products Eg.:Bio + - Pork and Beef Campina De Groene Koe – dairy
UK	IFOAM	NGO Soil Association	Soil Association	Soil Association UK5
UK	EU and UK regulation plus some small extras	Industry	Assured Food Standards (AFS)	Assured British Foods
UK	AFS plus special animal welfare regulations	NGO Royal Society for the Protection of Cruelty to Animals (RSPCA)	Freedom Food	RSPCA Freedom Food
UK	EU organic standard and AFS	Producers	Organic Farmers and Growers	Organic Farmers and Growers (UK2)

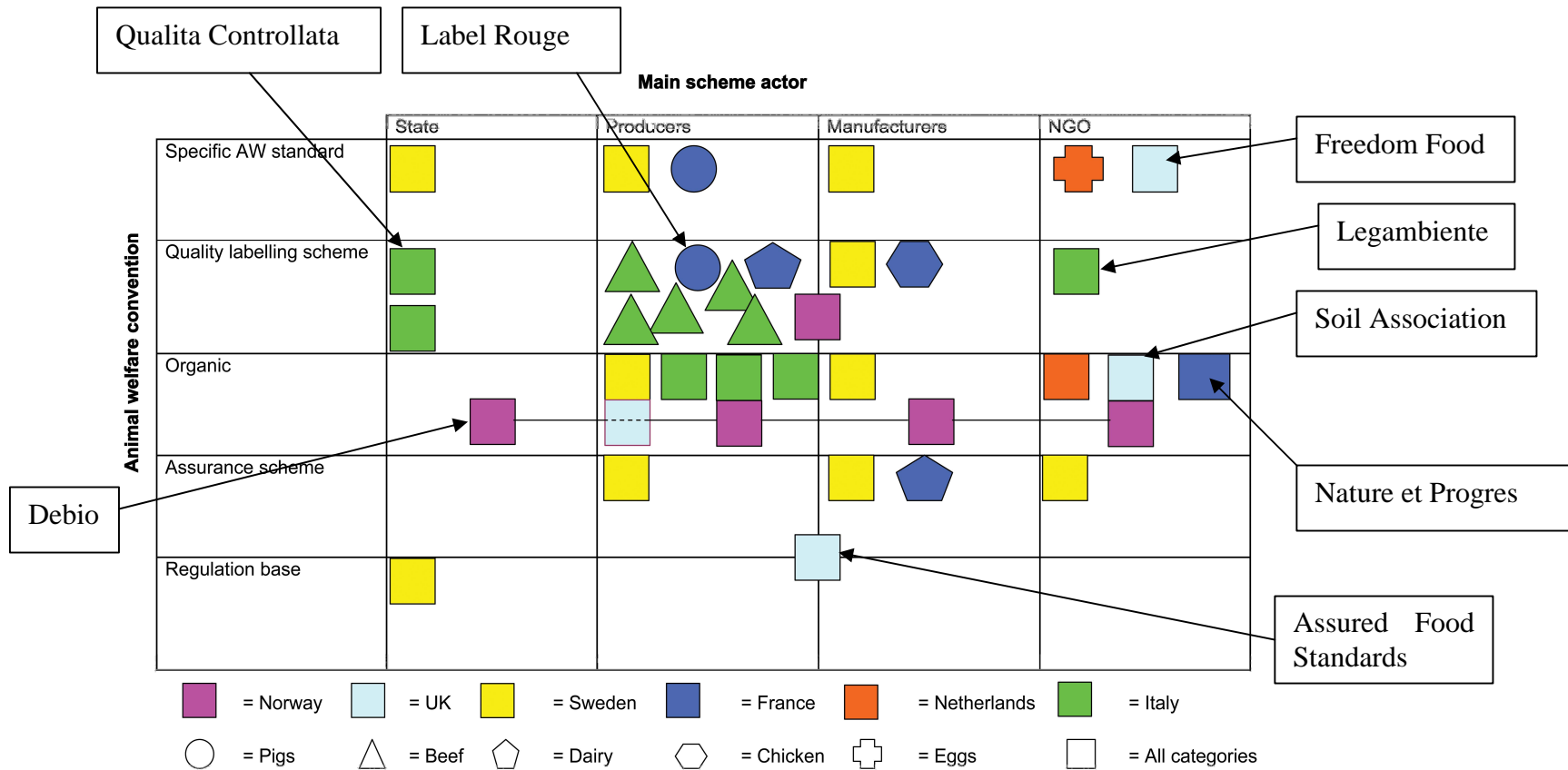


FIGURE 12.1 Non-retailer led schemes.



# COMPARATIVE ANALYSIS OF MARKETING SCHEMES OF NON-RETAILER LED ASSURANCE SCHEMES

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## 13.1 WHAT CLAIM DO THE LABELS MAKE? WHAT DOES IT MEAN?

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Products from all six countries bearing a vast range of labels make some claim about animal welfare. Table 12.1 illustrates the fact that the standards vary amongst those that make claims about animal welfare.

The schemes vary in the way they express a concern towards animal welfare on their packaging, but this is not related to the detail of the actual standards which farmers must implement. Below there are examples from the different countries which illustrate the different ways in which welfare-friendliness is expressed, the range of different types of labels that make claims and the type of standard that is connected with these labels.

### *What the animal is fed*

Grass chickens regularly graze outside in the grass and green of the meadows, where they can enjoy the healthy outdoor. Because one grass chicken eats more grass than another, their yolk may differ of color. Grass chickens only receive vegetable food.' Grass Eggs,<sup>16</sup> found at Albert Heijn, Konmar, Super de Boer; PVE/IKB (Production Standard), Scharrel Eggs (Name of the programme origin: Poultry Product Board) NETHERLANDS

This is the most popular way to express animal welfare because it jointly communicates an interest in food quality as well as animal welfare. In fact, perhaps it is an over-assumption that statements about what an animal has eaten are placed on packaging to communicate animal welfare, certainly some consumers may not read it that way, but

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<sup>16</sup> Grass eggs is also the name given for 'outdoor/free range eggs' in the Netherlands. It not only refers to what the animals feed but also the name was chosen to specifically endorse the fact that the chickens have outdoor access.

the fact that some may read it as illustrating a lean towards welfare-friendliness makes it a valid inclusion.

*What space the animal has to live in*

The quality of life of our cows: whether in the stable or outside in pasture, they live in the calme, in a spectacular and spacious environment (...) Good conditions at milking, in a clean and welcoming milking parlour, our farmers avoid stress to respect animals' well-being. Le Route du Lait label (Manufactured by Candia-Sodiaal under the brand name Candia) FRANCE. <[http://www.lerustique.net/page\\_fr/actualites/route\\_lait.html](http://www.lerustique.net/page_fr/actualites/route_lait.html)>

'Eggs from open-air farms. Our hens live in the open air. The Corte eggs are laid by free-range hens fed on vegetable-based feed. The passion for the well-being of the animals and the respect for bio-safety are the foundations of our model farms.' Uova della Corte Coccodì (Eggs); Uova della Corte Coccodì All' Aria Aperta (Brand); Manufactured by Coccodì s.r.l (MI) – C. IMB. IT263; Certified by CSQA-CSICERT to certification standard UNI 10939 (ITALY)

Some generic reference towards animal welfare is often made on packaging, that doesn't specifically talk about the animal and how it lives. Just the Production Standard is used in other instances with no additional description, where the Production standard is known to equate with higher animal welfare.

'KRAV' Anglamark (Coop own brand) Milk, organic production standard KRAV. (SWEDEN)

The examples above illustrate the range of descriptive claims that are made alongside labels. They vary hugely in the quantity of information given on the packaging, the tone of the writing, the emphasis towards animal welfare, and the body that has manufactured the welfare-friendly product. When one considers the huge range of products, schemes, standards and claims, a picture emerges of a multi-tiered welfare-friendly product market (see Figure 12.1).

One of the key issues about these assurance schemes is to what extent have they been set up to offer a range of quality products to consumers, or are they driven instead by the supermarkets requirements for higher quality products which leads to greater demands for quality (and safety), volume and coordination by the suppliers? For quality to be guaranteed throughout the supply chain, assurance schemes have a vital role to play. Yet only some of these assurance schemes have a tool to communicate directly to consumers, for example a logo, and then the use of the logo is at the discretion of those in decide what goes on the product-packaging (retailer or manufacturer). The culture of logo use on packaging varies between countries, therefore the number of schemes that appeared visible in this study is not doubt also affected by these variations in culture.

### 13.2 HOW ARE THE SCHEMES ADMINISTERED, SET UP?

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The standards which make up these schemes are described by Nils Brunsson, University of Stockholm as “rules outside organisations” (IDS/IIED workshop report: 2005); they are ways of coordinating the value chain. Standards which have any bearing on animal welfare are set within a range of standard types including – public, private/company, collective private e.g. EUREPGAP, buyer requirements etc. Business to business standards are not communicated to consumers because they exist to transfer responsibility down the supply chain and to satisfy the ‘due diligence’ obligation, introduced by the 1990 Food Safety Act. Thus within this context the research has identified products where there are welfare-claims and a production standard on the packaging. The schemes that have been identified should be seen in the wider context of evolving standards which operate between different parts of the supply chain and which do not always carry a communication strategy to consumers.

There are a number of different processes by which the different schemes across the 6 countries have been set up. All of the following bodies are involved with setting up schemes: NGO, Producer group, Product Board, State, Regional State, Manufacturer. The different institutional and cultural background in the food industry within country affects the types of bodies that set up schemes with higher animal welfare standards. Table 12.1 and Figure 12.1 illustrate these patterns. Explanation for these different patterns can be found in the Deliverable 1.5 and 1.6, and national subdeliverables 1.2.1.2 which describe the market structure for animal-based products in the six countries.

The relationship between the regulatory standard-setting board, the voluntary scheme standards and the certification process is more defined in some countries and for some labelling schemes than others. The only legal animal welfare standards in Europe above the base-level standards is the EU organic standard. Thus there is a legal requirement for the organic certification scheme to be included somewhere on the product packaging. A number of organic schemes have been included in this study since they are the major component across all countries of non-retailer led production schemes. Animal welfare requirements within organic schemes vary. For example in the UK the Soil Association organic standards reaches higher standards than the Organic Farmers and Growers organic standard on certain animal species (pigs and poultry). Some would argue that organic production systems should not necessarily be considered as always offering the ‘highest’ animal welfare, but for example in the UK legal support has been received by one of the organic certification bodies that state they can make claims that can easily be misinterpreted as animal welfare is highest under their scheme.

“No system of farming has higher animal welfare standards than organic farms working to Soil Association standards.” (Certification News No.53 Spring/Summer 2005).

This statement is newly approved by the UK Committee on Advertising Practice. Consequently, there is a two-tiered organic labelling standard across Europe as the schemes are divided into those that comply with the EU organic standard requirements and those that comply with the IFOAM organic standard requirements (see Table 4.1). Both standards undergo regular revisions. Beneath these organic standards are a plethora of varying ‘Specific Criteria Assurance Schemes’ which meet standards that are higher than the basic regulatory requirements but which are unregulated. The certification, monitoring and labelling of these products and the claims made about animal welfare is entirely voluntary. It is therefore in the interest of the body that sets up the scheme to maintain their own credence in the industry to ensure that standards are adhered to and inspections regularly made. Beneath the ‘Specific Criteria Assurance Schemes’ are holistic assurance schemes which operate in all sectors of the industry and which hover just above the EU agricultural standards. These assurance schemes contain special regulations enforced by national governments which particularise production systems according to National laws. For example, in the UK the Assured Food Standard includes higher animal welfare regulations on pig production than is regulated by the EU. Sweden and Norway also have higher standards on animal welfare that is enforced by National law. These national schemes do make some claims about animal welfare in part to ensure and mark out their competitive position in the market against products produced in other countries of Europe which do not reach these particular standards.

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### 13.3 WHAT ARE THE COSTS OF SETTING UP THE LABEL?

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Some of the schemes are sponsored by NGOs and in this cases there is, on occasion, subsidy which decreases the costs of running the schemes for example Freedom Food (UK), Nature et Progres (FR), Legambiente (Italy), Soil Association (UK), see Figure 12.1. In other cases there is an industry initiative to create the scheme, or to apply for a specific product to be entered into a national State-run quality assurance scheme (Label Rouge or AOC in France) and to protect their market by having a scheme and in this case the industry shares the cost (e.g. Assured food standards (UK)). In Norway and Italy there are particular schemes which are subsidised by the State at regional level in the case of Italy (Qualita Controllata), at national level in the case of Norway (Debio). For the Manufacturer-led schemes and Producer-cooperative schemes the schemes are self-funded because the creation of their own label is part of their marketing strategy.

13.4 WHAT WERE THE MOTIVATIONS FOR SETTING UP THE LABELS?  
ETHICALLY DRIVEN? MARKET DRIVEN?

There is a small number of schemes that it can be argued were set up for ethical reasons exclusively (see Figure 12.1 and Table 13.1). The organic schemes and the NGO-led schemes more readily are considered as ethically-driven. For the majority of schemes it is a response to the market that has led to these schemes to be set-up. The market may have changed because of new legislation. The Food Safety Act of 1990 with the expectation of ‘due diligence’ by retailers, was seen as pivotal in forcing retailers to take responsibility for the safety of food on the shelf which led them to seek out assured food. This has led to the development of assurance schemes that hover above the National regulation level which meet the requirements of retailers and manufacturers who are not directly responsible for producing the foodstuffs that they use to make processed-products. The two-tier position for organic standards benefits the market for two reasons. It suits a market where there are farms in conversion towards the higher standard. In many cases the stronger organic brands are positioned at the higher welfare standard. Yet ‘organic’ has been mainstreamed into a segment of retailers’ own-brands which in many cases are not interested in using the certifiers’ logos and so in which case the lower organic standard is more convenient because this organic produce is cheaper.

TABLE 13.1 The reasons behind the setting up of standards.

Standard Setting Body	Standards across the six countries	Reason
NGO	Mention Nature et Progres; Nature et Progres; Legambiente Italy; Soil Association	Ethical
Manufacturer	Candia : La Route du Lait; Parsons	Commercial
Producer and Manufacturer	Swedish Seal	Commercial
Producer	Label Rouge; Eletta; Carni Bovine Certificate; Frisk Ko; Svensk Fugel (Poultry); Swedish Meats (Scan); Organic Farmers and Growers	Commercial
Producer	Debio	Commercial/Ethical/ Legislative
Regional State	Agriqualita; Qualitata Controllata	Commercial
Inspection Body	KRAV; SKAL; Demeter	Legislative
Industry Initiative	MHS Sweden; Assured Food Standards UK; KSL Norway; Norway Speciality Mark, Norway; Netherlands; France; Italy.	Commercial/ Legislative



## CONCLUSIONS TO PART II

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The Assurance Schemes that are studied in this report have developed under different initiatives. Broadly, commercial, legislative and ethical initiatives have led to the creation of the assurance schemes (Table 13.1).

It is interesting to consider a the examples of the schemes in the UK to appreciate the relationships between different schemes and how and why they have developed differently. The Soil Association is the major organic certifying agency in the UK. It has a charitable side to its operations (advice to farmers) as well as a commercial side (the certification process). Freedom Food is the only animal welfare focused assurance scheme in the whole of Europe. It is subsidised by the UK charity the RSPCA (Royal Society for the Protection of Cruelty to Animals). Both the Soil Association and Freedom Food schemes can be understood as having originally been motivated by moral and ethical concerns. The obvious difference between these two schemes is that the aspirations of the Soil Association and other members of the organic movement led eventually to the development of a legal standard. However Freedom Food and others interested in higher animal welfare standards haven't got a legal framework for producers to work to and so operate more as an add-on to base-level assurance schemes rather than operating within a legislative framework. It appears in the UK that not all retailers choose to communicate what assurance schemes the product has been produced under. This has implications for the level of consumer knowledge and awareness of the scheme. All organic products by law must carry at least the organic certification code but crucially ONLY if they are to be sold as organic; the use of the logo is optional but often included with the code. It is clear that there is a significant percentage of organic produce that is not sold as organic – could some alternative marketing strategy be used for these products? However there is no requirement for Freedom Food foodstuffs to be labelled as such; therefore the use of the logo is optional. In an increasingly brand-aware world this has implications on the level of publicity and promotion of certain schemes over others. This was expressed as an issue for Freedom Food who loses out in terms of publicity when their logo is not used. This case study is indicative of the issues that surround the use of voluntary labelling schemes as opposed to those that carry legislative backing.

The use of logos on packaging is optional and used more as a marketing tool for consumers, for the majority of schemes. However membership of base-level schemes is increasingly the only way to gain access to certain parts of the food retail market, specifically sales to the large food retailers whose own private assurance schemes are broadly comparable to the national base-level standards.

The agricultural sector operates within a changing, competitive business context. This means that national assurance schemes can have a strong impact on the import/export market of agricultural goods as exchange rates change and higher standards advantage and disadvantage different parts of the industry. Robin Johnson (2004) has commented on this issue within the context of increasing quality standards within the meat industry: producers rather than consumers bear the cost of quality improvements. He also comments upon how the benefits and costs are likely to be distributed unevenly between countries. The current problems that face the UK pig industry is an example of this where the additional costs to meet the higher welfare standards have effectively become a trade barrier.

The two-tiered organic certification in Europe reflects the different commitments of the assurance bodies. For some bodies the business context is the primary interest, whereas for other bodies it is the pursuit of higher standards. There is a growing body of literature that discusses organic food standards (Guthman, 2004; Campbell and Liepins, 2001). Much of this literature focuses on how the standards have been developed and what has influenced their development. Emerging from this study are the inter-relationships between different organic assurance schemes and other assurance schemes and how this has developed a multi-tiered scale of competing welfare-friendly food product claims across Europe. It is interesting to consider what the long-term implications are of their various assurance scheme standards – do they lead towards the continuous rise of standards?

Previous research on standards within the food industry has pointed to the need to explore how the adoption of quality and safety standards is influencing the market. The findings of sub-task 1.2.2.2 addresses how assurance schemes shape market developments which then in turn affect consumer welfare and industry structure. Balsevich et al. 2003 argued that ‘markets segmented by quality and price may serve the varied needs of consumers more effectively than a single minimum quality standard’ (2003:1153). The findings from this study support that claim but also indicate that within the European dairy and livestock market the development of retailer own-brands that have started to embrace quality and safety standards has led to the reduction of the explicit marketing of assurance scheme standards. The relationship that assurance schemes have with consumers is becoming increasingly confused in Europe as retailers choose not to use logos, or where they are used as part of a marketing strategy they do not give a clear picture to the consumer about what standards the products meet. In some cases the assurance schemes began as an industry initiative and logos were then developed to appeal to conscientious consumers. Whereas in other cases it is the label aimed at consumers that is a primary motive to create a niche in the market. The moves particularly by UK retailers to reduce the use of logos on their own-brand products, or to use them as a market segmentation strategy pushes the assurance schemes back towards a predominantly industry concern. This leads to a large amount of meat and dairy products that are produced to higher animal welfare levels than EU minimum standards but which are not labelled as such. However where the retailers are less dominant the place of the label is still thriving on food packaging for products produced by manufacturers or farming cooperatives. Typically notions of trust and confidence in food are part of the assurance scheme package, but now it is the retailer brands themselves that are working to claim this territory in the UK. We may see similar

developments in the future within other countries. This development makes increasing sense as the meat supply chain from suppliers to major retailer is increasingly integrated. A study by Lindgreen and Hingley (2003) on the UK meat supply chain is a useful guide to the transitions that may take place and that are already taking place in the Netherlands. Traditionally the UK meat supply chain is complex (see Lindgreen and Hingley, 2003), however following the increasing consumer concern around issues such as food scares and animal welfare some of the retailers have developed their own meat supply structure. A study of Tesco demonstrates this:

‘Tesco now buys directly from suppliers using a centralised distribution system, and the meat products are first delivered to central warehouses before being distributed to individual retail stores. Overall, the supply chain is viewed as one supply chain (and not as a number of more independent supply chains....) in which all parties work together in order to deliver the product-quality that the consumers are asking for. This also means that the relationships between Tesco and the meat suppliers become long-term supply relationships, and that the supply chain must allow for transparency, communication, and trust’ (Lindgreen and Hingley, 2003).

This leads to the aims of the next part of the project (1.2.3) to increase understanding about the role retailers and other market actors play in the market for welfare-friendly foodstuff.

The study of the market structure across the six study countries has provided detailed understanding of the contrasting market and institutional dynamics which affects the development of a market for welfare-friendly food products. The first two empirical phases to the workpackage have started to illustrate the current complexity of the welfare-friendly food market. Manufacturers are particularly powerful in the current market for communicating welfare-friendly foodstuff, but the influence of retailer own-brand products is growing, particularly within countries that have a concentrated supply structure and an open market. Non-retailer led labelling schemes support the communication of welfare-claims primarily through how welfare is bundled into claims about quality.

Below is a brief summary of each country.

### *UK*

The retail market in the UK is increasingly dominated by retailer brands. A few specialist producer labels exist, these tend to be quality products possibly organic which include animal welfare as a quality attribute. In comparison to other countries there are relatively few Quality Assurance schemes, following consolidation of a number of farm assurances schemes under one logo. There is one dedicated quality assurance scheme for animal welfare that faces difficulties in getting its logo used on product-packaging.

*France*

The retail market in France is characterised by a growing number of retail brands but still dominant presence of manufacturers brands. Producer brands are also strong; these producer brands emerge from small, fragmented regional-based cooperatives. There has been less consolidation in the quality assurance schemes in France; a number of schemes and logos exist and they range in origin from a manufacturer, a producer group or an NGO.

*Italy*

Manufacturers brands dominate with a growing number of retailer brands. Manufacturer brands are very strong in Italy, the retail sector is beginning to develop own-brand ranges where organic ranges feature which make welfare-claims. Regional and producer group based quality assurance schemes dominate in Italy. The schemes are orientated towards product quality or the environment, not specifically about animal welfare.

*The Netherlands*

Manufacturers brands still dominate; but there is a growing number of retailer and producer brands. Producer brands are dominated by producers of the indoor free-range egg business which has taken off very successfully in Dutch retail stores. The product boards have species-specific quality assurance schemes that use a logo. There are examples of producers who have developed welfare-friendlier production systems who have developed their own quality assurance scheme and accompanying logo. The organic quality assurance scheme is run by an NGO.

*Sweden*

Producer brands are dominant in the Swedish market for welfare-friendly foodstuff. The Swedish farming cooperatives pride themselves on having higher welfare standard than their international counterparts, thus it is not surprising that this sector is so dominant. However, retailer and manufacturer brands are growing in significance. A number of logos which promote quality assurance schemes exist in Sweden; these have originated from producer groups or manufacturing companies. The number and visibility of these schemes reflect the need to gain a point of difference between Swedish products and imported product on the grounds of animal welfare.

*Norway*

There is a negligible amount of products with a specific reference to animal welfare, particularly in the soft discount stores (the leading store format in the country). Within the limited market there is strong presence of manufacturer brands. Very weak presence of retailer brands. Quality assurance schemes in Norway have been developed by the

industry to promote Norwegian products. Neither the producer groups nor the manufacturers have been influential in the development of logos on food packaging here.

The next empirical phase will build on these initial findings through an interview-based study of retailers and other supply-chain actors for welfare-friendly food products across the five product categories. The aims of this phase are to understand how products that communicate welfare-claims reach the shop-shelf through investigating the post-farm-gate production, manufacture and marketing.



## PART III

# PIG FARMERS AND ANIMAL WELFARE: A STUDY OF BELIEFS, ATTITUDES AND BEHAVIOUR OF PIG PRODUCERS ACROSS EUROPE

edited by

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## INTRODUCTION TO PART III

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Subproject 1 of the Welfare Quality programme investigates the attitudes and practices of consumers, retailers and producers concerning animal welfare and assesses to what extent new welfare strategies may be acceptable among them and achievable in practice. This paper reports on work-package 1.3 that deals with the perspective of farmers engaged in livestock production. It aims at understanding farmers' motivation to engage in animal friendly production, as well as identifying incentives and barriers to the development of animal friendly products and the adoption of more rigorous animal welfare standards. It integrates four sub-projects. The first sub-project is a review of socio-political and market developments of animal welfare schemes in the six participating countries (France, Italy, the Netherlands, Norway, Sweden, the United Kingdom). It evaluates the status of national legislation of animal welfare and identifies four types of animal welfare production schemes (Bock and Van Leeuwen, 2005).

- Basic (farm) quality assurance schemes: most of them focus on food safety, product quality and traceability. They may or may not contain an animal welfare module regulating animal welfare at the level of European or national legislation.
- Top (farm) quality assurance schemes contain an animal welfare module, but generally focus on food safety, product quality and traceability. The animal welfare standards defined go beyond European or national legislation.
- Specific animal welfare schemes deal specifically with animal welfare and claim to guarantee significant improvements in animal welfare. Generally the animal welfare standards defined go well beyond European or national legislation.
- Organic schemes follow the basic organic philosophy for farming. Animal welfare is included in this philosophy but the focus of organic farming is broader, including concerns with environmental protection, health, food safety and quality and animal welfare. Their animal welfare standards go well beyond European or national legislation.

The following three sub-projects in work-package 1.3. are three case-studies looking into the situation in pig production, cattle production and poultry production. This case-study focuses on the perspective of farmers in the pig sector, engaged in pig breeding or fattening of pigs or combinations of both. This case-study started in February 2005. The case-study among cattle farmers started in November 2005; the poultry case-study is scheduled for summer 2006.

## 15.1 RESEARCH OBJECTIVES

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The case-studies focus on farmers' attitudes to animal welfare, on factors affecting the decision to participate in animal welfare schemes and on their judgement of current animal welfare regulations. By comparison across countries, we try to find out if farmers across Europe think differently about animal welfare and have different experiences. Besides, comparison across animal welfare schemes should reveal if and how participation in schemes affects farmers' attitudes and perspectives.

Summarizing the objectives listed in detail in the technical annex of the Welfare Quality Project, this case-study should achieve the following:

- An understanding of beliefs, views, conceptions and attitudes of producers with regard to farm animal welfare and current animal welfare regulations;
- An assessment of motives, considerations and incentives that weigh upon the decision to participate or not in the animal welfare scheme, now or in the years to come;
- An analysis of barriers encountered by non-participating producers to entering (or withdrawing from) animal welfare schemes related to their appreciation of the animal welfare issue, view on legal regulations, required farm adjustments, finances, social environment and information obtained;
- An analysis of farmers' experiences with participation in animal welfare schemes;
- An assessment of farmers' communication strategies on animal welfare activities;
- An identification of information strategies of interested producers with respect to details on existing welfare schemes.

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## 15.2 RESEARCH METHODOLOGY

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### *Research Sample*

In accordance with the terms of reference of the project, each national team selected 60 pig farmers on the basis of the farm type they represent and their participation or non-participation in animal welfare schemes. Per country it was tried to stratify the sample in five categories:

1. farmers participating in a basic quality assurance scheme;
2. farmers participating in a top quality assurance scheme;
3. farmers participating in a specific animal welfare scheme;
4. farmers participating in an organic scheme;
5. farmers that do not participate in quality assurance schemes.

Comparing these groups of farmers enables us to identify incentives and barriers in the conversion to animal welfare schemes and to understand how conversion to more animal welfare production methods could be encouraged and supported by policy interventions.

Since the size of our sample is too small to be regarded as representative, we wish to point out that the results of this study can not be interpreted as representative for all pig farmers in the six study countries. The results must be interpreted as indicative. The results reflect an exploration of beliefs, attitudes and behaviour concerning animal welfare among pig farmers.

We choose to make use of a purposive instead of a representative sample of farmers as it would allow us to understand if participation in animal welfare schemes matters for farmers' readiness to improve animal welfare in their farm. This resulted in an overrepresentation of farmers participating in quality assurance schemes with a higher focus on animal welfare. Not all the six countries have an equal amount of animal welfare schemes or host all defined levels of animal welfare schemes. In some countries it was not possible to find non-participating farmers since nearly 100 per cent of the farmers were participating in the lowest level of animal welfare schemes. In addition, we tried to maximize variation with regard to other characteristics such as age, gender, geographical situation, farm type and farm size. The precise composition of the national samples is summarized in Table 1.1.

TABLE 15.1 Research samples per country.

Country	Non-participant	Basic quality assurance scheme	Top quality assurance scheme	Specific animal welfare scheme	Organic scheme	Total
Italy	–	40	4	–	16	60
France	29	6	19	4	4	62
Netherlands	–	23	23	3	13	62
United Kingdom	6	–	29	19	6	60
Sweden	–	2	48	–	10	60
Norway	–	58	–	–	2	60

Each category represents farmers from one specific scheme, although for some categories multiple schemes exist in France. In the Italian sample the farmers in the basic quality assurance scheme category produce according to one of the 27 PDO/PGI product specifications (Protected Designation of Origin/ Protected Geographical Indication). The Italian top quality assurance scheme includes all currently participating farmers of the COOP<sup>17</sup> scheme. Italy has no specific animal welfare schemes and, thus, no farmers in this category. The Dutch sample includes farmers participating in two basic quality assurance schemes (IKB Pigs and IKB 2004) and two top quality assurance schemes (Good Farming Welfare and Milieukeur). The IKB schemes cover nearly 100 per cent of the Dutch pig farmers making it impossible to find non-participating farmers. There are two top quality schemes (ABP and GQ) represented in

<sup>17</sup> Abbreviations are explained in Appendix 1.

UK sample. As there are no basic quality assurance schemes, this category is empty. Sweden has five important basic quality assurance schemes (MHS, BAS, KLS, SLP, Ugglarp) and five important top quality assurance schemes (SvDHv, BIS, BIS+, SwedehamPlus, SLP+). As it was difficult to find farmers that participate in no or only basic quality assurance scheme, top quality assurance members are predominant in the sample. The sample includes organic farmers but as specific animal welfare schemes do not exist in the Swedish pig sector, this category is empty. The Norwegian sample is different from the others as it includes predominantly pig farmers in basic quality assurance scheme and some organic farmers. This can be explained by the fact that there are only few organic farmers, that top quality assurance schemes do not exist in the Norwegian pig sector and that nearly all farmers (81 per cent) participate in basic quality assurance schemes. There exists only one small specific animal welfare scheme at present, initiated by one pig farmer.

### *Data Collection and Analysis*

In order to gather comparable information the teams agreed upon using a common basic questionnaire (see Appendix 2). This questionnaire serves as the basis for all case-studies (pig, cattle and poultry). The questionnaire includes questions about the following issues:

- farmer's participation in animal welfare schemes;
- farmer's perception and definition of animal welfare;
- farmer's perception of animal welfare legislation;
- farmer's perception of animal welfare off the farm;
- farmer's perception of market and society and belief in animal-friendly products.

Each team was free to adopt the formulation of questions as long as the same issues would be covered. They could also include additional questions. Since the advancement of animal welfare legislation differs across the six countries some questions needed to be tailor-made. This regards for instance questions about the adoption of additional animal welfare measures in the future. Each team pre-tested the questionnaire and adapted formulation when necessary. The questionnaires are semi-structured and include open as well as closed questions. Per country the level of structuring varies. The Swedish and Norwegian questionnaires follow the classical semi-structural model most closely, including mainly open questions and issues to be discussed and allowing for a flexible development of the conversation. The Italian questionnaire is much more pre-structured in comparison by already including a range of potential response-categories. The questionnaires of the other research team may be situated in between those two types.

In France, United Kingdom, Italy and The Netherlands farmers were interviewed face-to-face and on the farm. The interviews lasted on average 1.5 hours. Because of the distances and low density of farms the Swedish and Norwegian team did about two third of the interviews by way of telephone. These interviews lasted generally 1.5 hours or more, were tape-recorded and transcribed. In Norway 11 face-to-face interviews on the farms were followed by 49 telephone interviews. The Swedish team did four face-

to-face interviews on the farm and 56 telephone interviews. Although there are some differences in questionnaires and interview method, the information gathered is comparable. For a qualitative analysis, conformity of questions and response-categories is not important. The purpose of analysis is to uncover the variance in beliefs, attitudes and behaviour and not to measure the frequency of a given category. The analysis is focused on the uncovering of issues and concerns and the understanding of motivations and reasoned behaviour. For the latter flexibility and room for taking contextual characteristics into account is of great importance. All research team analysed the collected material in this manner, trying to find out if participation in production schemes, national differences or other factors matter for farmers' attitude, beliefs and behaviour. The Swedish and Norwegian team made use of specific software (NUD\*IST Software N6 and NVivo).

Each national team reported on their findings in a national report (see references). The synthesis report is based on these reports, summarizing but also comparing national findings. In order to find out if participation in animal welfare schemes makes a difference, we compare between farmers across animal welfare nationally as well as internationally. But we also compare between countries in order to understand of the different organization of the pig sector between countries matters.

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### 15.3 OUTLINE OF THE REPORT

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In Chapter 16 we describe and compare the organization of the pig sector in the six countries, looking into its size and composition, current animal welfare legislation and the existence of animal welfare schemes. Chapter 17 deals with farmers' ideas about animal welfare schemes, their motivation for participation and their experiences. In Chapter 18 we analyse farmers' attitudes towards animal welfare – their relation with animals, definition of animal welfare, the importance they attach to it and their assessment of the welfare of animals on their farm. Chapter 19 describes how farmers think about animal welfare regulation and their readiness to accept more stringent measures. Chapter 20 looks into animal welfare beyond the farm – during transport and at the slaughterhouse. In Chapter 21 we analyse how farmers think about the role of consumers, retailers and the government for what concerns animal welfare. We look also into farmers' ideas about animal welfare campaigners and the possibilities for animal friendly products on the market. In Chapter 22 we draw some conclusion regarding farmers' participation in animal welfare schemes and their readiness to engage in more animal friendly production methods.



## PIG FARMING ACROSS EUROPE

When comparing the participating countries it is notable how much the pig sectors differ across Europe. This regards size and composition, regulation and organization in schemes but also production quantity and level of self sufficiency. Among the countries participating in this research we find big producers and exporters such as The Netherlands and France but also relatively small producers who produce mainly for national consumption such as Norway. It is probable that farmers' position on the national and international market, impacts on farm management and their attitude to animal welfare issues. In order to understand how farmers deal with animal welfare in their farms and think about the future, it is therefore important to keep those differences in mind. In this chapter we briefly sketch the context of pig farming in Norway, Sweden, UK, the Netherlands, France and Italy by looking into size and composition, recent developments in the sector, the level of national self sufficiency and relation of import versus export of pig meat and meat products. In addition we look into the recent occurrence of animal epidemics or other animal related crises, the public image of pig farming and the extent to which farm animal welfare is a currently societal issue and concern. Finally we will explain the availability of animal welfare assurance schemes for pig farms in the various countries.

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### 16.1 THE SIZE AND COMPOSITION OF THE SECTOR

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In all six countries the pig sector has developed in a similar way in recent years, resulting in the concentration and up-scaling of pig production. Generally the number of pig holdings declined whereas farm size increased. Sweden witnessed a moment of dramatic decline when entering the European Union in 1995 resulting in a reduction of 70 per cent among pig holdings. Looking into the size of the national pig herd we see a reduction of 80 per cent in Sweden since 1980, 66 per cent in The Netherlands and 40 per cent in The UK. In Italy the size of the pig herd remained quite stable whereas it increased in France.

At the moment the countries differ considerably for what regards the sector's size and organization (see Table 16.1). Norway and Sweden have the smallest national pig herds, France and the Netherlands the largest national pig herds. Also the number of pig farms varies; Norway and Sweden have the lowest number of pig farms and France and Italy the highest. When looking at size in terms of number of pigs per farm, we see that

Dutch pig farms are the largest with an average of 1,111 pigs per farm and Italian farms the smallest with an average of 70 pigs per farm.

TABLE 16.1 Comparison on number of pigs, pig farms and average farm size in 2004.

	Holdings		Pigs		Pigs per holding
	No.	%	No.	%	No.
Norway	3,775	2	803,699	2	213
Sweden	3,194	2	1,818,037	4	569
United Kingdom	12,300	6	5,160,557	12	420
France	46,792	23	15,096,000	35	323
Italy	124,448	62	8,580,150	20	70
Netherlands	10,039	5	11,153,000	26	1111
Total	200,548	100	42,611,443	100	208

Source: National reports on the pig case-study.

In France, Italy and the United Kingdom we find a large group of very small pig farms and a small group of very large pig farms, responsible for the major share of pig production. To give just two examples: In Italy 4 per cent of pig farmers take care of only over 90 per cent of pig production, which are raised primarily on farms with more than 1,000 pigs. Most of the other farmers produce for home consumption in the first place. In the UK 13.9 per cent of pig farmers produce 80.8 per cent of the national pig production. In the UK, pig production is dominated by a small number of large companies (corporations) that work mainly on contract-base and own everything in the primary chain from pigs to processing plants. In Norway, Sweden and the Netherlands, the distribution between small and large farms is more balanced. The distribution of pig farms by size per country is illustrated by Table 16.2.

TABLE 16.2 Distribution of pig farms by size per country

Farm size <sup>1</sup>	< 100 pigs	100–500 pigs	500–1000 pigs	> 1000 pigs
France (2003)	68%	14%	7%	11%
Italy (2003)	96%	2%	1%	2%
United Kingdom (2004)	68%	11%	7%	14%
Farm size <sup>2</sup>	< 200 pigs	200–500 pigs	500–1000 pigs	> 1000 pigs
Netherlands (2004)	33%	28.5%	21%	18%
Farm size <sup>2</sup>	< 100 pigs	100–500 pigs	500–700 pigs	> 700 pigs
Norway (2004)	37.5%	37%	8%	17%
Farm size <sup>2</sup>	< 100 pigs	100–500 pigs	500–750 pigs	> 750 pigs
Sweden (2004)	47%	29%	8%	16%

Notes: <sup>1</sup> farm size according to fattening pigs and breeding sows; <sup>2</sup> farm size according to fattening pigs.

Source: National reports pig case study.

In some countries pig production has specific characteristics. In Italy around 85 per cent of the slaughtered pigs have a live weight up to 160 kg in order to comply with the production specifications of products like Parma ham, salamis and salted meat cuts which strongly characterise the Italian pork industry. In most of the other countries pigs are slaughtered at a live weight which varies from just below 100 kg in the UK up to 125 kg in Sweden.

The countries differ also for what regards the relation between production for export and domestic consumption (Table 16.3). The Netherlands produces more than twice the amount of pig meat that is required for domestic consumption. Dutch pig producers generally depend on export for selling their products. Farmers in Sweden, Norway and France are fairly self-sufficient for pig meat. When comparing the amount of import and export for these countries, Norway and Sweden have relatively protected markets compared to the other countries. Domestic consumption is nearly (Sweden) or mainly (Norway) covered by domestic production. In France some import and export does take place to match the demand for different sorts of pig meat. The UK and Italy are not self-sufficient and depend on the import of pigs and pig meat to cover consumers' demand. In the UK more meat is imported than produced. British and Italian farmers are thus confronted with considerable foreign competition.

TABLE 16.3 Comparison of domestic production and consumption in 2004.

	Norway	Sweden	United Kingdom	France	Italy	Netherlands
Net domestic production (1,000 tonnes)	113.5	281	698	2,323	1,536	1,298
Import of pig meat (1,000 tonnes)	2.5	65	999	510	907	263
Export of pig meat (1,000 tonnes)	3.8	34	107	635	170	873
Available for consumption (1,000 tonnes)	112.2	312	1,557	2,209	2,259	688
Consumption per capita (kg)	24.4	34.7	26.1	36.4	38.9	42.3
Self-sufficiency degree	101%	90%	43%	106%	67%	230%

*Note:* The actual consumption of meat and meat products is about half of the consumption based on carcass weight. The remainder comprises bones, waste fat, and meat for pet food and weight losses.

*Source:* GIRA/eurostat/PVE in PVE 2005 and national reports.

## 16.2 SOCIETAL PRESSURE ON PIG FARMERS

The economic situation has been difficult for pig farmers in many countries which is mirrored in the above described development of concentration and scale enlargement. Also the societal pressure has been high in some countries. Animal welfare is one of the 'hot issues' of current public debate in the UK as well as the Netherlands, which is related to recent outbreaks of animal epidemics such as FMD, BSE and avian flue and the accompanying destruction of millions of animals. It is the second most important concern of Dutch consumers, following food safety, and there are many animal welfare action groups. In the United Kingdom animal welfare action groups are possibly even more active than in the Netherlands and their political influence proportionally more

significant. In both countries animal welfare action groups participated in the start of specific animal welfare schemes, of which Freedom Food (UK) is the most important (Bock and Van Leeuwen, 2005).

In France and Italy citizens seem to be less concerned with animal welfare unless perceived in combination with food quality and critique of industrialized agriculture. Generally speaking the idea is that traditional agricultural systems allow for both, better animal welfare and higher food quality (Souquet et al., 2005). In many countries pig farming is controversial and perceived as a sector responsible for high levels of environmental pollution. This is the case in the Netherlands, France, UK and Italy. In Norway and Sweden pig farmers' image seems to be rather positive.

In Sweden and Norway citizens are concerned with animal welfare but generally consider it as a foreign problem. They are convinced that animal welfare is well taken care of in their country because of the strict legislation. In both countries it also seems to be accepted by farmers and retailers that animal welfare is not an appropriate domain for market differentiation and competition (Skarstad and Borg, 2005; Bruckmeier et al., 2005). It is mainly considered as a matter of public governance that should not be solved by way of the market (although animal welfare labels do exist). At this point Norway and Sweden are quite distinct from the other four countries where animal welfare is at least partially regulated by way of the market. The position of the UK is somewhere in between these two groups which can probably be explained by the need of the government to respond to the societal pressure following the BSE crisis (Hubbard et al., 2005). We come back to this point when explaining the structure of animal welfare production schemes.

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### 16.3 NATIONAL LEGISLATION FOR ANIMAL WELFARE<sup>18</sup>

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In France, Italy, the Netherlands, UK and Sweden the animal welfare legislation for pigs is based on the EU Directive 2001/88/CE. The EU permits member states to issue stricter requirements for animal welfare. By the EEA-agreement, Norway is obliged to implement the EU directives regarding animal welfare, but, like EU member states, can issue stricter regulations for animal welfare. As a result animal welfare regulations for pig production are remarkably equal across the six countries. The most important standards issued by the EU Directive 2001/88/CE are the following.

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<sup>18</sup> For more information about legislation and animal welfare schemes see Bock and Van Leeuwen (2005).

- Minimal surface standards.
- Sows must be kept in group housing from four weeks after insemination until the week before farrowing. From the week before farrowing until four weeks after insemination it is allowed to keep the sows in individual housing.
- Permanent tethering of the sows is forbidden since 1 January 2006.
- Fattening pigs have to be provided with adequate materials for distraction and have to get a certain amount of fibrous fodder.
- Pigs must have permanent access to fresh water.
- Minimum requirement of 40 lux light.

A transitional period applies for buildings that were built before 1 January 2003, allowing them to live up to the old standards until 1 January 2013. The new and old regulation differ mainly with regard to the following points: individual housing of sows during their whole sexual cycle; surface space required for pigs, no obligation to the providing of playing materials or fibrous fodder; no requirements for amount of light, except that pigs cannot be kept in dark conditions.

The animal welfare legislation applying in France and Italy follows the EU Directive 2001/88/EC without additional requirements. National animal welfare legislation in the Netherlands, United Kingdom, Sweden and Norway follow the minimum standards described in EU Directive 2001/88/CE, but also have additional requirements or issue stricter standards. Comparing the positions of the six countries in relation to EU regulations we find Norway and Sweden at the top with the strictest regulations, followed by the UK, the Netherlands and at some distance France and Italy positioned at the level of EU regulations.

Table 16.4 summarizes the main aspects of national regulations. It shows that The Netherlands, Sweden and Norway have stricter requirements for floor surface for weaned and fattening pigs. In the United Kingdom, Sweden and Norway group housing for non-suckling sows is already required in all buildings and pigs must be provided with solid floors and straw bedding. In Sweden and Norway tail docking and teeth clipping is prohibited and the minimum weaning age of piglets is at four weeks. Norway demands that castration is done by a veterinarian using anaesthetics, while in the other countries castration without anaesthesia is allowed for piglets less than seven days of age, and is usually performed by the pig farmer. The minimum required light intensity in Norway and Sweden is 75 lux for eight hours per day, instead of 40 lux for eight hours per day as required by the EU. Sows and gilts in Norway must be provided with suitable nesting material one week before farrowing. Sweden and Norway also maintain stricter provisions for animal welfare during animal transport by limiting the maximum length of a journey to eight hours. In certain cases Norway allows an additional three hours for transport. For Swedish transporters it is possible to extend transport duration for weaned pigs up to 24 hours by fulfilling certain extra conditions.

TABLE 16.4. The most important minimum animal welfare requirements for pig farming

EU		N	S	F	NL		UK	I
<i>Minimum surface requirements in m<sup>2</sup> per animal<sup>1</sup></i>								
Weaned and fattening pigs					Old stables	New stables		
< 10 kg	0.15	0.15	0.25 - 0.32	EU	0.20	0.40	EU	EU
10 – 20	0.20	0.20	0.32 - 0.40		0.30	0.40		
20 – 30	0.30	0.35	0.40 - 0.55		0.50	0.60		
30 – 50	0.40	0.50	0.55 - 0.82		0.65	0.80		
50 – 85	0.55	0.65	0.82 - 1.02		0.80	1.00		
85 – 110	0.65	0.80	1.02 - 1.75		1.00	1.30		
> 110 kg	1.00	1.00						
Non-suckling sows	2.25	EU	EU	EU	EU		EU	EU
<i>Group housing in all farms<sup>2</sup> required by when?</i>								
Non-suckling sows	2013	Present	Present	EU	EU		Present	EU
<i>Is solid flooring required?</i>								
Fattening pigs	100% slatted floors allowed	Lying area is solid floor	65 – 75% solid floors	EU	40% solid floors		EU	EU
<i>Light intensity</i>								
	40 lux, 8 hrs/day	75 lux, 8 hrs/day	75-100 lux 8 hrs/day	EU	EU		EU + appropriate period of rest from artificial lighting	EU
<i>Straw bedding (or likewise) required?</i>								
Fattening pigs	No	Yes	Yes	EU	EU		EU	EU
<i>Minimum weaning age</i>								
Piglets	28 days, with specialised housing allowed	28 days	28 days	EU	EU		EU	EU
<i>Is un-anaesthetised castration allowed?<sup>3</sup></i>								
Piglets	Castration by other means than tearing or tissue (> 7 days: only under anaesthetic and additional prolonged analgesia by veterinarian)	No	EU	EU	EU		EU	EU
<i>Is tail-docking allowed?</i>								
Piglets	Docking of a part of the tail is allowed (< 7 days of age, not routinely)	No	No	EU	EU		Not allowed unless other measures to improve environmental conditions or management systems have been taken in order to prevent tail biting and other vices.	EU
<i>Is teeth clipping allowed?</i>								
Piglets	Uniform reduction of corner teeth by grinding or clipping is allowed (< 7 days of age, not routinely)	No	No	EU	EU		Not allowed unless other measures to improve environmental conditions or management systems have been taken in order to prevent tail biting and other vices.	EU

Notes: <sup>1</sup> In the Netherlands for stables built before 1-11-1998 and that have not been rebuilt or altered since 1-11-1998 the minimum space requirements for old stables apply. Stables or floors that have been built or rebuilt after 1-11-1998 have to comply with the minimum space requirements for new stables. <sup>2</sup> When buildings are built or rebuilt farmers have to adjust to group housing systems. <sup>3</sup> In the UK castration is allowed by law, but all schemes in the UK except the organic schemes prohibit castration of male piglets.

16.4 FARM QUALITY ASSURANCE SCHEMES

Besides legal measures several quality assurance schemes are used as tools to ensure higher levels of quality in Europe. This quality can be expressed as food safety or traceability of animals or products but can also be expressed as animal welfare levels. In the first year of the Welfare Quality Project the team of researchers defined four categories of so-called ‘animal welfare schemes’ (Bock and Van Leeuwen, 2005). These identified categories of animal welfare schemes were used in all case-studies although some of the schemes are more prominent and relevant in some sectors and countries compared to others. For every case it needs to be established which specific schemes belong to the general categories. Moreover, not all categories are present for each sector in all countries. The choice of schemes for this case-study is summarized in Table 16.5 and explained more in detail below.

TABLE 16.5 Occurrence of different levels of quality assurance schemes in Italy, France, the Netherlands, the United Kingdom, Sweden and Norway.

Level of schemes	France*	NL	UK	Italy	Sweden*	Norway
Organic	L'Agriculture Biologique	SKAL	SA	In total 15 certifying bodies, e.g. AIAB, CCPB	KRAV	Debio
Specific AWS	Thierry Sweitzer	Scharrel	Freedom Food			Grøstadgris
Top	LRF	GFW, MK	ABP, GQ	COOP	SvDHv, BIS+, SLP+, Swedeham+	
Basic		IKB Pigs, IKB 2004			MHS, BAS, KLS, Ugglarps	KSL
	CCP/LRB			PDO		

Notes: \* Schemes mentioned are most important. The height where the scheme is put corresponds with the advancement of the animal welfare specifications within the scheme. Since animal welfare legislation in Norway and Sweden is more advanced, the level of the basic quality assurance schemes in Norway and Sweden are higher than in the other countries.

*Italy*

Italy has 27 PDO/PGI product specifications regarding pork meat, of which seven ham products. In total they account for 71 per cent of the total pig production. Each of the 27 PDO/PGI products has a set of product specifications. The rules focus on pig breeds, feeding requirements, minimum weight of meat cuts, drying periods and traceability procedures. The Italian PDO and PGI have no specific additional requirements for animal welfare. For this research PDO and PGI product specifications are regarded as basic quality assurance schemes.

One of the largest Italian retailers, COOP, has set up a programme that contains some higher animal welfare standards. In this scheme only a select group of four pig farms participates. The COOP scheme is selected as a top quality assurance scheme. There are no specific animal welfare schemes in the Italian pig sector. There are roughly 100 Italian organic pig farmers; each of them can choose to be controlled by one of the 15 different certification bodies.

*France*

France has two basic quality assurance schemes, CCP and Label Rouge Bâtiment. CCP integrates 25 per cent of pig production and 4,480 pig farmers. The CCP scheme contains no requirements for farming practices. In the Label Rouge Bâtiment scheme 250 pig farmers participate, producing 0.5 per cent of the pigs in France. Label Rouge Bâtiment has one requirement concerning animal welfare demanding at least 120 per cent of the minimum regulatory surface area per animal in buildings. Due to the limited amount of animal welfare specifications there is little difference between the non-participating pig farmers and the participants in the basic quality assurance schemes. In this report we will consider these farmers to be in the same group: the basic quality assurance schemes. In France the proportion of quality assurance schemes that include standards for animal welfare is very low. The pigs produced under these schemes represent only 2–3 per cent of the pig production in France and about 4.5 per cent of the French pig farmers (900). The Label Rouge Fermier scheme, a top quality assurance scheme, requires farmers to use outdoor or straw bedding systems. In the Label Rouge Fermier scheme 330 pig farmers participate, producing about 0.5 per cent of the French pigs. Because the very high welfare specifications the Label Rouge Fermier comes very close to specific animal welfare schemes. There is only one very small specific animal welfare scheme in France, the “Les Fermier de l’Est”, founded by Thierry Schweitzer. In this scheme 5 pig farmers participate. Organic pig farming occurs under the scheme “L’Agriculture Biologique”, about 300 pig farmers in France are organic pig farmers. About 70 per cent of the French pig production does not take place inside a quality assurance scheme.

*The Netherlands*

The Netherlands has two basic quality assurance schemes – IKB-Pigs and IKB 2004. Both schemes are quality assurance schemes focussing on food safety, product quality,

traceability and contain an animal welfare module. IKB Pigs addresses the whole production chain of pig meat, from farm to fork whereas IKB 2004 deals only with pig farmers. Nearly 100 per cent of the Dutch pig farmers participate in one of these two programmes. IKB is a basic scheme, generally required for participation in other schemes.

DUMECO, the largest slaughterhouse, has initiated the top quality scheme Good Farming Welfare (GFW) in order to access the British market. The scheme demands group housing for sows and integrates about 50 per cent of all Dutch pig farmers. Milieukeur is another but rather small top quality scheme (with 16 farmers), set up by pig producers and originally designed to meet environmental concerns. By now it also includes animal welfare standards.

The free-range programme called Scharrel is the only specific animal welfare scheme, set up by the Ministry of Agriculture, the animal protection organisation and consumer organisations. It was fairly successful until 2000 with 100 free-range pig farms. Since 2000 it lost market share due to competition with organic pig farming. Now there are about 10 free range pig farms left.

The organic pig production sector experienced a considerable growth until 2003 as a result of an agreement between a processing company, retailers and the Ministry of Agriculture.<sup>19</sup> In the years 2001–2003 the number of organic pig farms increased from 37 to 95 farms. But the demand of organic pig meat stayed behind and in order to protect the market 35 organic pig farmers were forced (sold out) to stop producing organic pig meat. Since 2004 the organic pig sector gradually recovered with currently 78 organic pig farms.

### *United Kingdom*

There are no basic quality assurance schemes in the United Kingdom. The Assured British Pigs (ABP) and the Genesis Quality Assurance are the two top quality assurance schemes. Whereas ABP focuses on pig production, GQ allows farmers to assure several or all farm enterprises (e.g. beef, lamb or combinable crops). About 90 per cent of the British pig production is covered by the ABP scheme, for GQ there are no figures available. Since the animal welfare specifications of these schemes are of a higher level than the national legislation (i.e. a prohibition on castrating male piglets) the level of animal welfare in the daily practice of (nearly all) pig farming in the UK is higher than the level of animal welfare legislation. Of all participating countries the UK has the largest specific animal welfare scheme called Freedom Food, in which 500 pig framers participated in 2001. It was set up by Royal Society for the Prevention of Cruelty to Animals (RSPCA).

There are several organic schemes open for organic pig production. The two largest are 'Soil Association' (SA) with 120 pig farmers and 'Organic Farmers and Growers' with licenses for less than 60 pig farmers.

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<sup>19</sup> Their aim was to boost the turnover share of organic pork to 15% for Albert Heijn and 10% for Plus at the end of 2004. This would mean a turnover share of organic pig meat in the Dutch market of 4.5%.

*Sweden*

In Sweden there are multiple basic quality assurance schemes. There is the MHS, a voluntary self control programme for animal protection. Complying with MHS is required by the organic scheme KRAV, SvDhv and most slaughterhouses but pig meat is not sold under the MHS label. Next to MHS there are several basic quality assurance schemes carried out by either co-operative or private slaughterhouses. Examples of these are the BAS and KLS schemes, issued by respectively Swedish Meats and KLS Livsmedel and the SLP and Ugglarps schemes, issued by respectively SLP Slaughterhouse and Ugglarps Slaughterhouse.

Sweden has also multiple top quality assurance schemes. The most widespread top quality assurance scheme is SvDhv's (Swedish Animal Health Service). This scheme is developed as a health control programme but also contains animal welfare requirements. SvDhv functions as a guarantee of animal health and is demanded by slaughterhouses. There are 2,368 pig farmers participating in the SvDhv scheme, representing 64 per cent of the total number of pig farmers in Sweden. Of the pig fattening farms 90 per cent participate in SvDhv. SvDhv demands compliance with the MHS standards as a prerequisite. Top quality assurance schemes are initiated by slaughterhouses are BIS and BIS+, which in their turn are founded by the cooperative Swedish Meats, and SLP+ of SLP Slakteri and SwedehamPlus from Skövde Slakteri, both slaughterhouses, owned by investors.

There are no schemes that classify as specific animal welfare schemes in Sweden. For organic farming there are two labels in Sweden, Demeter and KRAV. Both labels are certified by KRAV. Demeter only had 1 large pig producer participating in April 2005, whereas KRAV had 90 organic pig producers in 2002 but only 65 in 2004.

*Norway*

In Norway the main basic quality assurance scheme is KSL. It covers all types of agricultural production, including pig production and addresses several themes including animal welfare. Of all Norwegian pig producers 81 per cent participate in KSL, producing 86 per cent of the Norwegian pigs. Only very small pig farmers do not participate in KSL. There is no top quality assurance scheme in Norway at the moment, but Norway has a very small specific animal welfare scheme, developed by one single pig farmer. The organic scheme in Norway is called Debio. It is a privately owned agency that controls and certificates organic production in Norway. Their authority is delegated by the Ministry of Agriculture and Food and the related governmental control body. In 2004 there were only 19 organic pig farmers in Norway.

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 16.5 SPECIFIC ANIMAL WELFARE SCHEMES
 

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As the overview in Table 16.5 illustrates, the occurrence of quality assurance schemes in the pig sector varies between countries. Only France and the Netherlands have schemes for all four levels; the UK has no basic scheme whereas Italy and Sweden have no specific animal welfare scheme; more or less this is true for Norway as well (with the exception of one single farmer's initiative). The spreading of animal welfare schemes across the six participating countries follows a certain pattern and there seems to be a link between the existence of animal welfare schemes, the level of national animal welfare legislation and the importance of animal welfare as current public concern. Although the following case-studies in the cattle and poultry sector still have to prove this relation, it seems to be the case that animal welfare in farming is differently organized within Europe (see Figure 16.1 for an illustration).

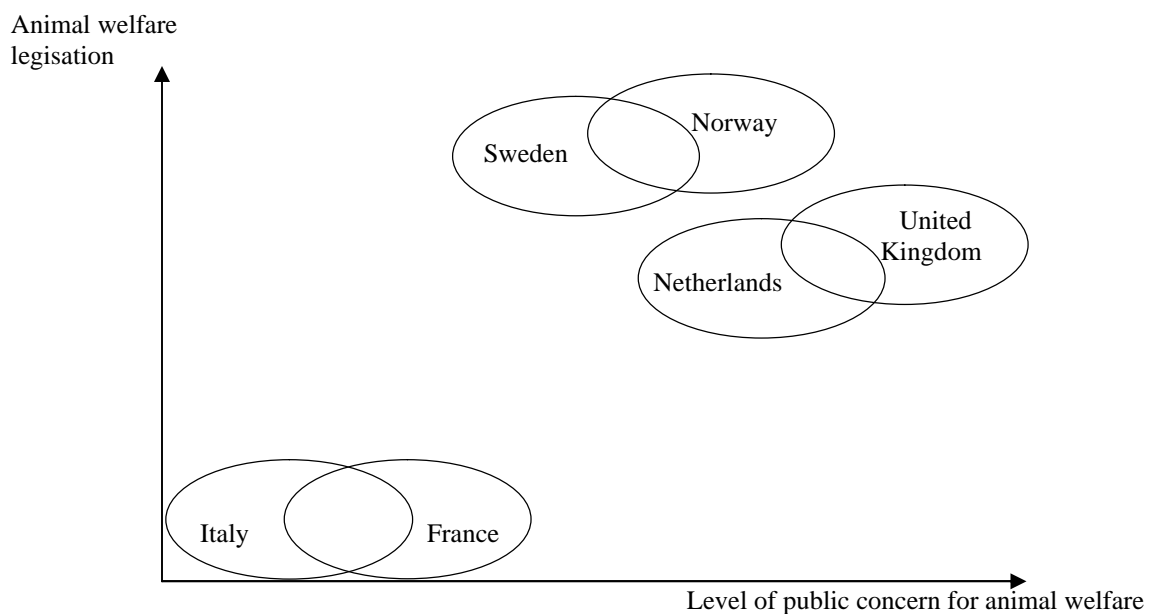


FIGURE 16.1 Countries compared on developed levels of quality assurance schemes under the influence of animal welfare legislation and public concerns. The dark coloured countries have more levels of quality assurance schemes.

Some countries such as France and the Netherlands aim to realize a higher level of animal welfare mainly by way of the market. This is done by way of animal welfare production and marketing schemes. Dutch legislations are above European level but there is little political will for further tightening. Instead, politicians point at the responsibility of 'the market'. Quite on the contrary Norway and Sweden choose to settle the issue primarily by legal regulation. Market instruments in the form of labelling are less important but of growing importance in Sweden. In Norway and Sweden there currently is a moderate public concern and activism for animal welfare. (Kjørstad, 2005;

Bock and Van Leeuwen, 2005) The UK takes a position somewhere in the middle with relatively strict animal welfare legislation and the existence of a strong specific animal welfare schemes. Both may in part be explained by the high level of public concern and activism which forced politicians to tighten the law and convinced retailers to develop quality assurance schemes that surpass the level of the animal welfare regulation in either top quality assurance schemes or specific animal welfare schemes. This made the development of a basic quality assurance scheme obsolete. In Italy public concern about animal welfare is moderate and did not result in high levels of public engagement and activism. Consequentially there is little reason for government, farmers or retailers to tighten legislation or design animal welfare production schemes. COOP, one of Italy's biggest retailers recently started very recently to develop a specific animal welfare scheme, involving so far only four farms.

## PARTICIPATION IN ANIMAL WELFARE SCHEMES

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This chapter reports on farmers' motivations for entering or not entering quality assurance schemes and the advantages and disadvantages they expected or experienced regarding specific scheme-aspects. Besides, we look into farmers' ideas about the functioning of quality assurance schemes in the current market in which demands for safety, quality and animal welfare increase. We compare between farmers across countries and across animal welfare schemes in order to find out if participation in schemes makes a difference for farmers' interest in animal welfare issues but also if the different national context of the pig sector matters.

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### 17.1 MOTIVATION FOR SCHEME PARTICIPATION

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Across the six countries farmer have similar motivations for entering quality assurance schemes. The main incentive for farmers is to realize better *economic results* as a result of better prices or improved market access. This motivation can be enhanced by offering additional benefits such as reduced insurances premiums or reduced costs for monitoring systems. The French farmers in the top quality assurance scheme are a bit of an exception. These farmers share the main economic motivation for participation, but mention as a secondary motive the possibility to offer their animals more natural living conditions. Other important motivations are the possibility for distinction in the market and consequentially improved market access. Where it comes to participating in specific animal welfare schemes or organic farming, farmers are motivated by ethical concerns as well. Table 17.1 summarizes the main motivations of farmers for entering various animal welfare schemes.

It demonstrates that the motivation for entering basic or top quality assurance schemes hardly differs at all. Farmers are mainly motivated by better prices (top compared to basic or basic compared to outside schemes) or improved market access. Some of the farmers in top quality schemes are attracted by the opportunity for *high quality production* and improved *labour conditions* (for instance outdoor instead of indoor). For what concerns the basic quality assurance schemes we have to take into account that

participation is increasingly defined as precondition for getting access to the market anyhow. Non-participation is hardly an option anymore. One Norwegian farmer put it like this:

‘KSL is a little bit like voluntary coercion, but I believe it’s good for us.’(Norwegian farmer)

Farmers in specific animal welfare or organic schemes are mainly motivated by ethical concerns and the possibility to improve animal welfare. But economic motives are important too, as well as better market accessibility. Other motivations, put forward occasionally, refer to the opportunity to escape from the pressure for scale enlargement by earning more per animal. Besides, some farmers welcome the possibility to cooperate with retailers and to stabilize their relations.

TABLE 17.1 Overview of main motivations for entering the various animal welfare schemes.

Basic quality assurance	Market access
Top quality assurance	+ premium price (not Sweden and UK)
	+ quality production
Specific animal welfare	+ ethical considerations
Organic agriculture	+ working conditions

In the Netherlands and Sweden farmers often participate in multiple schemes in the same time. This is mainly due to the fact that participation in one scheme functions as a prerequisite to enter another scheme. Usually the basic or top quality assurance scheme serves as a prerequisite for a higher scheme, such as organic farming. It is also because the schemes include other criteria than animal welfare, for example environment or labour protection. Some schemes are overlapping. In Sweden there is a fixed quota for the amount of organic pig meat that can be produced. Organic farmers have the strategy to participate in multiple schemes at the same time in order to be able to sell their pigs for a premium price when the quota for organic pig meat is reached.

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## 17.2 BARRIERS FOR SCHEME-PARTICIPATION

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Farmers who do not participate in a specific animal welfare scheme have various reasons not to do so. Most important is that they do not believe that participation will indeed improve their economic results. Quite on the contrary many of them believe that it might constrain their chances in the market and their possibility to sell meat. It is thus perceived as *increasing economic risks*. Top quality assurance schemes and especially specific animal welfare schemes are perceived as niche production with a small market share. The same is true for organic farming in their view. They doubt that consumer’s are willing to pay and have little belief in the economic viability of such schemes.

Important is also that many of those farmers do not believe that animal welfare is really improved through the regulations stipulated by the schemes. Dutch farmers for instance often argue that outdoor housing is actually *bad for pig's welfare* in their view as it negatively affects animal health, meat quality and consequentially food safety. As the next chapter about farmers' attitude towards animal welfare will demonstrate there is a clear link between a farmer's definition of animal welfare, their criteria for assessing animal welfare and their evaluation of animal welfare benefits. Farmers who define animal welfare primarily by way of animal health, do not only disbelieve that animal welfare schemes add to animal welfare. These farmers even believe that the scheme specifications of animal welfare schemes could endanger animal welfare. As a result it is hardly surprising that they are generally not interested to enter such schemes, unless forced by market or law.

Many farmers doubt also the *cost-effectiveness* of schemes as the stipulated stocking rate norms, surface area per pig, straw bedding and organic feed substantially increase production costs while in the same time resulting in suboptimal technical results or in other words lower production quantity and quality.

Others worry about their *own labour conditions* as requirements for outdoor housing or straw bedding systems for instance, increase their work load, with the animals but also in administration. Some foresee that they will have to work under worse health conditions, because of for instance straw dust and outdoor work. Some foresee various practical and technical implementation problems.

For some farmers an important motive for not entering schemes is the *fear of losing independence*. They suspect that processing companies try to expand their share of the market by way of schemes and in doing so limit market access for independent competitors. A British farmer put it this way:

'[Schemes are] clearly a rather crude form of confidence trick, used to limit the markets open to producers.' (British farmer)

Many farmers point at various *practical (technical) implementation problems* such as space requirements or climatologic conditions. Finally quite some farmers point out that they have *little knowledge* of such schemes, either because they never cared to get information or because only few of such schemes exist in their country. This is certainly true for specific animal welfare schemes which are still rather small and unknown in most of the participating countries. Organic farming is familiar to farmers but by many considered as a bridge too far.

### 17.3 IMPACT OF SCHEME-PARTICIPATION ON FARM-MANAGEMENT

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When talking with farmers about the positive impact of scheme participation on farm management, the overlap with reasons given for entering schemes is notable. Maybe this is not surprising as the farmers we interviewed and who explained why they entered schemes, had of course already experienced how it affected their farm. This does not mean that they had only positive experiences. But it is a minority of farmers who feels restricted by scheme specifications, mainly because of the obligation to sell their pigs to specific slaughterhouses, or by the increase in (administrative) work load. Most farmers feel not restricted in their daily management. For what regards the basic quality assurance scheme this is mainly because the specifications of the scheme do not surpass the level of national legislation. Important for the other schemes where additional regulations have to be adopted, is to take into account that farmers perceive participation in the scheme as voluntary and thus their own choice. They knew what they need to do and have chosen to do so. How could they now complain?

Below, we look more in detail at various aspects of farm management and the impact of scheme participation on them.

#### *Administrative Workload*

The experience with additional administrative work as a result of scheme participation differs considerably across countries and schemes. Within basic quality assurance scheme Swedish farmers do not experience that their administrative workload is increased by their participation in the basic quality scheme. Most Swedish farmers regard the administration they have to do for the scheme as necessary. Following Norwegian farmers the basic quality assurance scheme requires additional administration. Dutch farmers indicate that participation in a basic quality assurance scheme resulted in a lot of additional administration when the scheme started about 10 years ago. Over the years this has improved and the paperwork has been reduced. The majority of the Dutch farmers in the basic quality schemes think that the scheme does currently not increase their administrative workload anymore.

In top quality assurance schemes and the specific animal welfare schemes all British farmers complain about additional administration whereas Dutch and Italian farmers are more divided. About half of them experience a considerable increase in administration whereas the others do not. Some farmers explain that they do not mind extra paper work as long as it provides valuable insight in farm management and potential improvements. All British farmers complain about extra administration in organic schemes, an experience shared by about half of the Dutch farmers participating in such schemes.

### *Market Access*

Most farmers perceive participation in basic quality assurance schemes as a basic condition for production today, because it is almost impossible to sell pigs outside schemes. Practically they think that participation is mandatory and not a matter of choice.

For the majority of farmers in top quality assurance schemes improvement or insurance of market access is its main benefit. Some farmers remark, however, that participating in such schemes limits the number of slaughterhouses to whom they can sell their pigs, and thus, technically limits their market access.

For participants in specific animal welfare schemes improved market access is perceived as its main benefit. Some of the Italian farmers point out that they also value the certainty that comes along with the direct relation to a main retailer group. Most Dutch farmers in the specific animal welfare scheme are negative about the ability of the scheme to provide a better market access because of their disappointing experience some years ago (see Section 16.4).

Farmers in the organic scheme perceive the premium price they receive for their pigs as a more important benefit than increased market access. It is not so much a bigger market they get access to than a very specific niche market where consumers are ready to pay more.

### *Future Expectations*

In most countries farmers think that not to participate in quality assurance schemes is hardly an option anymore, and will certainly become more obligatory in the near future.<sup>20</sup> Many explain that staying out of scheme will only be possible for very small farms, operating in local niche market, but not for 'real' 'professional farmers' who produce for a larger market and sell their pigs to non-local slaughterhouses and retailers. Many farmers also expect that the various types of quality assurance scheme will increase in the future. But depending on the current availability of schemes, the ideas sometimes differ per country. Norway and Italy have no or only a very small top quality assurance schemes or specific animal welfare schemes. Whereas most Italian farmers are convinced that in the future all farmers will have to participate in some sort of animal welfare scheme and perceive it as advantageous, only about half of the Norwegian farmers share this view. They have no faith in higher prices for better animal welfare but have also moral concerns. Promoting a product as animal friendly would indirectly imply that other products are less animal friendly. This would not be right as the level of animal welfare is already very high and high enough in Norway in their view. Their scepticism is illustrated by the following citation.

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<sup>20</sup> This question was not asked in France, since the majority of the French pig farmers operates outside quality assurance schemes.

'I think it is dangerous to walk down that road. From the consumers' point of view I can understand why one would want to focus on such issues. But, first of all, there is no need for this in Norway, as animal welfare is already good in my view [...] By claiming that they are ahead with regard to animal welfare, they indirectly imply that the rest of us are operating on the edge of the law.'  
(Norwegian farmer)

British farmers expect that schemes will remain in place but may become integrated in a national scheme, focusing on animal welfare. They foresee that regulations will tighten in the future and that, as a result, administration and bureaucracy will increase. The organic farmers hope that their scheme will remain stable but if change is inevitable they prefer a further tightening of rules in order to ensure their distinction in the market. The majority of Dutch farmers think that schemes will remain in place and that participation will improve the future position of their farm. Only the farmers in specific animal welfare scheme feel less certain and doubt the future existence of their schemes as consumers might not be willing to pay the extra price anymore.

### *Control Regime*

In general farmers have no problems with being controlled, especially not the farmers who voluntarily participate in quality assurance schemes. Control is perceived as a logic consequence of operating within a scheme. In addition control is experienced as a way to keep them alert and eventually improve farm management and as a way to demonstrate to customers and consumers that they work responsible and with care.

Most farmers are satisfied with the control regime. In Norway, some farmers believe that the control of the basic quality assurance scheme could be more frequent. In their opinion this would contribute to the credibility of the scheme. When farmers mention negative aspects of the control regime they refer mainly to the perceived in-efficiency of the controls. Farmers are often visited by inspectors from the scheme as well as inspectors from the Ministry of Agriculture, each performing similar inspections. Farmers wonder if organization could not be organized in a more efficient and cheaper way, by having one auditing agency qualified to perform controls for both purposes in the same visit.

Farmers complain about the extra amount of paperwork coming along with inspection, and they would prefer if inspection concentrated more on the practical aspects of farm management and pig farming instead of focusing on administration. Some farmers are disappointed by the knowledge controllers have of pig farming. As a result they are sometimes perceived as fussing about minor issues.

### *The Role of the Veterinarian*

In most of the six countries veterinarians visit farms on a regular basis, either for health monitoring purposes or as auditor for schemes. In Norway veterinarians perform the castration of the piglets.

Italian, French and Dutch farmers think similarly about veterinarian's role in assuring animal welfare. Most pig farmers consult veterinarians only on health issues, not animal welfare, although animal welfare might sometimes be discussed during a regular veterinarian's visit. Treatments like castration, teeth cutting and tail cutting are generally carried out by the pig farmers themselves and not the veterinarian. Organic farmers sometimes complain about the traditional ideas of veterinarians about healing and medication and their limited understanding of the organic philosophy.

'He comes by, registers some numbers and gives some advice. But he is a real, traditional veterinarian. A little cough and he says: 'They're coughing, you must give them something'. I don't want that. There are maybe three animals with a little cough and then I don't want to treat them all. When it is really serious, I'll isolate the animal. No quick fixes for everything. I believe that my livestock builds up immunity in this way and more resistance for diseases.' (Dutch farmer)

British, Swedish and Norwegian farmers have generally a high opinion of the veterinarians' role in animal welfare. They appreciate their advice in animal welfare matters – both as a source of information on animal welfare as on management practices best for animal welfare.

'[The vet is] the best thing about the scheme, because information works both ways [farmer and vet] ... time never wasted talking to a vet.' (British farmer)

Some think similarly as the organic farmers mentioned above. They perceive veterinarians as too focussed on animal health and medications. They also believe that veterinarians are often afraid to speak out about animal welfare in fear to endanger the relation with their customers.

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#### 17.4 CONCLUSION

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Looking back on the overall experience of pig farmers with quality assurance scheme, we may conclude that across countries the experiences are quite similar, taking into account that some scheme are more prevalent in some countries than others.

Basic quality schemes are generally experienced as mandatory through their regulation of market access. Selling pigs would be very difficult and in many countries nearly impossible outside such schemes. Farmers expect that this will be even more the case in the future. Most farmers recognize the relevance of basic quality assurance schemes for the sector as they are warranting quality, reassure customers and consumers and confirm the sector's position in the market. Not all farmers are convinced that it is advantageous beyond this point. Some farmers appreciate the external checks as it keeps them alert and updated.

Working in a top quality assurance scheme is perceived as voluntary and beneficial. The most important benefit is distinction in the market by way of the quality label, sometimes combined with a guaranteed premium price. The latter is not the case in the UK and Sweden. Nevertheless the quality label increases and/or stabilizes market access for their products in their view. Some farmers feel more recognized and appreciated as producers of high quality meat, and are more satisfied personally and professionally. Many farmers appreciate receiving feed-back on their results through the scheme, which stimulates them to improve farm management.

Like participating in a top quality assurance scheme, participating in a specific animal welfare scheme is seen as voluntary and beneficial. Participants appoint welfare improvement as its most important benefit. Besides increased or ensured market access the distinction of the label is important as well. In addition, farmers appreciate the increased contact with customers of their meat, either through the direct relationship with retailers such as in Italy or through direct sale to consumers. In the latter case they take the chance to inform consumers about agriculture and animal welfare to promote their products but also to improve the overall image of the sector.

The experienced benefits of organic schemes are similar to the benefits of the specific animal welfare scheme. The improvement of animal welfare is seen as a main benefit, accompanied by increased or ensured market access through premium prices and the organic quality label.

# FARMERS' PERCEPTIONS OF ANIMAL WELFARE

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In this chapter we present how farmers think about animal welfare. How do they define animal welfare and how do they describe their relation with animals? Moreover, we present how farmers assess and evaluate the state of wellbeing among their own animals, the importance they attach to animal welfare and the room for improvement they perceive at their own farm.

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## 18.1 RELATIONSHIP WITH ANIMALS

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The French, Swedish and Norwegian team discussed during the interview farmers' relationship with animals. It appears that most farmers distinguish between their treatment of animals and their emotional attachment to them. Emotional attachment is not considered as essential for either a good relationship with animals or good animal welfare, whereas good treatment and good contact is. In fact many farmers emphasize the importance of having a good contact with the animals. Good treatment and good contact go together, but does not necessarily imply love.

‘When they are farrowing I go from sow to sow and put my hand on each one. They like it and me too.’ (French farmer)

‘[...] I am generally fond of animals, but you never develop a personal relationship to a pig, as opposed to for instance a horse. A pig – it stays a pig.’ (Norwegian farmer)

When talking about emotional attachment farmers distinguish between different types of animals. The first distinction is between pets and production animals. Most farmers are emotionally attached to their pets but not to their pigs.

‘They’re not like dogs; we don’t take them for walks one by one!’ (French farmer)

But not all production animals are the same either. There are differences between species but also within species. Generally reproduction animals are valued higher than fattening animals. Farmers are for instance more attached to their cows than their pigs, but they are also fonder of their sows compared to their fattening pigs. In part this can be explained by the number of animals that a farmer is dealing with. The larger the number of animals, the more difficult it is to differentiate between individual animals. In that case animals are more likely to be seen as a group. It has also to do with the daily contact with animals. The feeding and controlling of fattening pigs, for instance, is done in a group-wise manner. Monitoring a reproductive cycle or assisting a sow during delivery are specific tasks involving direct contact with an individual animal. Another explanation for the distinction between animals is the life span of animals on the farm. Cows have a longer productive life than sows, and sows have a longer productive life than fattening pigs. In some cases farmers are cautious not to get too attached to the fattening pigs since they have to send them to the slaughterhouse.

‘Yes, it is difficult many times. The fattening pigs are not the same, but when it comes to sows and boars there are more feelings. When the boars are sold then even my husband is soft. When we are selling cattle I am not loading. When it is done, you have to forget. The fattening pigs are OK [to send to the slaughterhouse]. I recognize some of the sows, I do, [that is] strenuous.’ (Swedish farmer)

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## 18.2 DEFINITION OF ANIMAL WELFARE

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How farmers define animal welfare differs across schemes but hardly across countries. In general two broad definitions prevail. First of all a ‘basic’ definition, that focuses on the provision of basic biological needs such as enough and good quality food, enough water, good climatic conditions. Good animal welfare is proven by good animal health and also by high zoo-technical performance.

‘You can recognise good animal welfare by low mortality rates; the animals grow optimally and perform well. You look at it from a technical viewpoint. There should be no abnormalities, no cripple animals, no tail biting, no injuries.’ (Dutch farmer)

The second definition measures animal welfare on the basis of animals’ opportunity for expressing natural behaviour and centres around the notions of freedom and comfort for the animal.

‘[When there is good animal welfare] animals can express natural behaviour constantly, with adequate space and litter. For rooting. I think it is bad when you lock animals in a box for farrowing. Especially then the urge for natural behaviour is very strong. They really need to build a nest.’ (Dutch farmer)

When comparing farmers across schemes there is a clear difference of opinion between farmers in basic and top quality assurance schemes on the one hand and farmers in specific animal welfare and organic schemes at the other. Again the French farmers in the top quality assurance scheme are an exception; they tend to resemble the farmers in the specific animal welfare and organic schemes. Whereas the first group of farmers is more likely to use the 'basic' definition for animal welfare, farmers of the second group tend to refer to the second definition.<sup>21</sup>

All farmers across countries and across schemes consider animal welfare important. It is important as it influences zoo-technical and consequentially the economic performance of the farm. Besides, it is important as farmers perceive taking good care of animals as their moral obligation. Finally they think it is important as it impacts on the public image of farming.

'Animal welfare is vital. Stock not well kept does not thrive and good performance is necessary on economic grounds'. (British farmer)

In Italy, the Netherlands and Sweden the group of farmers that regards animal welfare as important for its influence on zoo-technical performance is larger than the group of farmers that finds animal welfare important for ethical reasons. In The UK and Norway, this is the other way around.

'All good farmers want to look after their animals properly as living beings with rights'. (British farmer)

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### 18.3 ASSESSMENT OF ANIMAL WELFARE

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Most farmers think that animal welfare is well taken care of in their own farm. Most farmers base their assessment of animal welfare on close observation of the animals. They know the animals and see them everyday. They perceive their ability of assessing animal welfare as part of their professional knowledge and experience. They check the wellbeing of animals on the basis of behaviour, physical appearance, zoo-technical performance, and living conditions (proper food and clean water, bedding, space, proper ventilation, light and sanitation). There is a slight difference regarding this point between farmers participating in basic and top-quality assurance schemes on the one hand and farmers participating in specific animal welfare or organic schemes on the other. Farmers of the first group tend to focus more on zoo-technical performance whereas farmers of the second groups look into zoo-technical performance but emphasize the need to take animal behaviour and appearance into account as well.

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<sup>21</sup> Among the British farmers all three definitions may be found irrespective of their participation in any scheme. This is probably induced by the way this question was presented to the British farmers. Instead of answering an open question, British farmers could indicate which element they considered important for their understanding of animal welfare, without having to choose between them.

‘They eat and drink and have a good appetite’. (French farmer)

Across all countries there are farmers who acknowledge the possibility of improvement and farmers who think that there is “nothing really” to improve on their farm. Most of the Italian farmers think that animal welfare could be improved as climatic conditions such as temperature and ventilation are not optimized yet. There is however no clear cut difference between specific groups. In the Netherlands for instance only organic farmers saw possibilities for further improving animal welfare. But in the UK organic farmers stated that there is “nothing really” to improve anymore on their farms. Here farmers in basic and top quality schemes acknowledged that there is room for improvement.

‘There are things I could change, especially in the pasture. I want to make some places with shadow in the pasture. Now, with this amount of sunshine it really is too hot and they are inside a lot. I prefer to plant trees, but that takes too long. So it will be some sort of roof near the mud pool. And I would like to create two more mud pools in the back of the field. Then they will make more use of the whole field. You can see that they use it a lot. Sometimes there are 20 animals in the mud pool at the same time. Otherwise, animal welfare is OK.’ (Dutch farmer)

Some farmers refer to opportunities for improving animal welfare by way of changing regulations. They, for instance, suggest that the obligation for marking pigs with an extra metal ear tag before slaughtering should be abolished as it requires an extra operation. Small scale farmers in the Netherlands have problems with the requirement of taking blood samples from their pigs four times a year for disease monitoring. They are too small to make use of the blood controls at the slaughterhouses and therefore have to take blood from live animals. They consider this as unnecessary stressful for the animals and something easily to be avoided.

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## 18.4 CONCLUSION

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As we have seen above farmers are quite consistent in the way they define and assess animal welfare and in the importance attached to it. Farmers, who describe animal welfare in terms of zoo-technical performance and animal health, focus on these aspects when assessing the welfare of their animals. For them the importance of animal welfare is underlined by its impact on zoo-technical performance and economic results.

Farmers who define animal welfare more broadly, tend to focus on characteristics of the animal itself, such as behaviour and appearance when assessing the level of animal welfare. These farmers value animal welfare also for ethical reasons and consider it important as taking good care of animals is seen as a moral obligation. Besides, zoo-technical performance and economic results are of course important for them as well.

# FARMERS' PERCEPTIONS OF ANIMAL WELFARE LEGISLATION

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This chapter presents farmers perception of national and European animal welfare legislation and their readiness to accept new animal welfare regulations and measures. Since national animal welfare legislation differs across countries, the potentially new and stricter animal welfare regulations and measures differ per country.

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## 19.1. ASSESSMENT OF ANIMAL WELFARE LEGISLATION

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Most pig farmers are familiar with national animal welfare legislation. Their most important source of information are professional magazines, the Ministry of Agriculture, farmers' organisation, feeding companies or slaughterhouses.

Most farmers are in favour of animal welfare legislation as such but complain about specific regulations and measures.<sup>22</sup> In general, farmers who participate in specific animal welfare or organic schemes think more positively about animal welfare legislation than farmers in basic or top quality assurance schemes. When farmers in a specific animal welfare or organic scheme are dissatisfied with legislation it is often because they would prefer a more stringent legislation.

But farmers are of course not only positive about legislation. Their critique regards mainly the following points:

- measures might not improve or even worsen animal welfare;
- the imbalance between national legislation (within EU and beyond) is seen as unfair as it weakens their market position;
- implementation of regulations is perceived as too difficult in practice;
- implementation requires investments that are too large or not cost-effective in their opinion;

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<sup>22</sup> French farmers tend to be less positive about animal welfare legislation than farmers from other countries.

- measures are seen as increasing farmers' work load or worsen their labour conditions;
- measures are expected to negatively affect zoo-technical performance.

The imbalance between national animal welfare legislation and legislation elsewhere is considered unfair by those farmers who have to follow the relatively strict national regulations but must at the same time compete with import from countries, either inside or outside the EU, with lighter regulations. Especially UK farmers worry about the competition with farmers producing in the Netherlands and Denmark. But also Swedish farmers think that there should be more equal animal welfare standards. In their view it is most realistic 'to meet in the middle' which means reducing Swedish standards and upgrading EU regulations. In this way they hope to maintain their so far rather stable market position in the future. Although the situation is similar in Norway for what regards the level of regulations, most Norwegian farmers prefer to follow another strategy. They think that Norway should hold on to the stricter animal welfare regulations in order to maintain consumers' trust and preference for Norwegian products. A quarter of the Norwegian farmers object to Norway's leading role in animal welfare legislation.

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## 19.2 ATTITUDE TOWARD S ADDITIONAL MEASURES

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In order to assess farmers' readiness to accept stricter regulations on animal welfare, we asked their opinion about those additional measures that are currently discussed within the EU. Due to differences in advancement of animal welfare legislation over the six countries the potential new measures presented to the farmers, differ per country.

### *Group Housing for Sows*

Group housing for non-suckling sows is discussed with respondents in France and the Netherlands. It is already mandatory in the UK, Sweden and Norway. French and Dutch farmers think similarly about this measure. The farmers in the top quality assurance scheme, specific animal welfare scheme and organic farmers are generally in favour of rearing non-suckling sows in groups.

'They have more space and more freedom of movement.' (French farmer)

Only some of the farmers in no or basic quality assurance schemes share this opinion. They see advantages but are afraid of additional negative effects.

'Pigs on straw bedding is of course a wonderful sight! But there are some negative practical aspects as well. Individual housing is much more peaceful for the farmer and the animal. You can feed them separately and keep a close watch.' (Dutch farmer)

Most of these farmers object because they fear that in a group, the act of establishing group hierarchy will cause aggression, fights, injuries, abortions and stress for animals in general and especially the weaker ones. They also wonder if animal welfare is indeed improved in this way. They also fear to lose control and the possibility to closely monitor the animals for what regards food intake, diseases or infertility detection. Besides, it would result in more work and poorer technical results. Last but not least, the new system would require more surface area per animal and cause higher production costs.

Although these objections are prominent and understandable, it is important to acknowledge that Dutch farmers, who have implemented the new system, are generally positively surprised. They shared similar fears but see that it worked out well after all and that advantages outweighed the disadvantages.

'Looking back, I'm satisfied with the system after all.' (Dutch farmer)

#### *Ban on Tethering Sows*

The banning of tethering sows is another good example for changing opinions once measures are implemented. Tethering sows is already banned in all six countries but was nevertheless discussed with French and Dutch farmers.

The majority of them consider the ban on tethering sows as an improvement. Only few farmers, mainly in the basic scheme or not participating in a scheme are indifferent as they do not see much difference between tethered sows and sows in individual housing.

#### *Ban on Totally Slatted Floors*

In Norway and Sweden the lying areas of pig pens must consist of solid floors or provide deep bedding material. Next to that some slatted floors are allowed. Most Norwegian farmers are satisfied with this. Only a few large farmers would prefer to have more slatted floors.

Totally slatted floors are already banned in many countries (besides France and Italy) but the size of non-slatted areas is still under discussion. Farmers in basic and top quality assurance schemes are generally not convinced of the improvement realized by more closed floors. They fear ventilation problems and the loss of hygiene and worry about the increase in work load and harder working conditions. It is for these reasons that the majority of French and Italian farmers in this group are opposed to a ban on totally slatted floors. Most Dutch farmers consider partly closed floors as a good development, provided that the closed area is limited in size. Swedish farmers are

opposed to totally slatted floors because they think this will cause draft in the stables and makes the use of straw beddings impossible.

‘On straw bedding, they are dirty and therefore don’t grow well. That means they’re not in great shape.’ (French farmer)

Most farmers in specific animal welfare or organic schemes are in favour of banning totally slatted floors, although not all farmers are convinced of its significance for animal welfare.

#### *Minimum Weaning Age of 21 Days*

Again this issue was only discussed in France and The Netherlands as the minimum weaning age is already 28 days in the UK, Sweden and Norway.

None of the farmers in France and the Netherlands think that the minimum weaning age should be less than 21 days. Some farmers indicate that they wean their piglets at a slightly older age. Farmers in the specific animal welfare and organic schemes are required to wean their piglets at 38 respectively 42 days. They consider 21 days to be the absolute minimum. Some would prefer higher minimum weaning age, but do not think that weaning at 21 days harms the piglet.

#### *The Use of Straw or Other Bedding Materials*

The use of straw is already legally required in the UK, Norway and Sweden. Nearly all Swedish farmers are positive about using straw bedding systems. Farmer’s enthusiasm for straw bedding systems seems to increase when farmers participate in schemes that focus on animal welfare. It is in this type of schemes that the use of straw is often prescribed. But antagonists and protagonists are present in all schemes.

Farmers who oppose to using straw bedding systems worry primarily about the extra work load and unhealthy working conditions (dust) but also the loss in hygiene that could negatively affect animal health and food safety.

‘From a sanitary point of view – we see it with the vet – the animals are healthier on slatted floors and they are cleaner therefore they are better off.’ (French farmer)

#### *Providing Outdoor Areas*

This item was presented to farmers in France, Italy, the Netherlands, Norway and Sweden. Again there is a division between farmer in basic and top quality assurance schemes on the one hand and specific animal welfare and organic schemes on the other. The majority of farmers in the first group object to outdoor housing, whereas most of the farmers in the second group already provide outdoor areas and are content with it.

Some of them point, however, at the fact that outdoor housing might not be possible for all farmers because of surface area requirements and climatologic circumstances.

‘They will only bring more dirt inside, and then the stable gets dirty and slippery. Then leg problems will increase. In the past we had outdoor housing, but it didn’t work. In the winter it was too cold, in summer too hot. Those pigs don’t understand that they shouldn’t stay outdoors.’ (Dutch farmer)

The consistency between farmers’ assessment of outdoor housing and their definition of animal welfare is again notable. Farmers, who define animal welfare by expression of natural behaviour, perceive this system as advantageous as it allows for more freedom of movement and provides more natural living conditions. Farmers who define animal welfare mainly by animal health or zoo-technical performance, generally reject outdoor housing systems due to poorer hygienic conditions, more risks of contamination and less control of climatic conditions.

#### *Ban on Castration of Piglets*

The ban on castration is discussed with farmers in Italy, the Netherlands, Norway and Sweden. All Italian farmers (across all schemes) are in favour of castrating male piglets in order to avoid any chance of boar taint in pig meat. As the Italian processing industry demands heavy pigs, aged over 10 months, the chance of boar taint is very high. Most of the Dutch and Swedish farmers are in favour of a ban on castration under the condition that there must be a solution for the boar taint, otherwise they fear that consumers will stop buying pig meat. Dutch farmers add that this solution should also be internationally accepted. Until this time farmers feel forced by the market to castrate their male piglets in order to warrant their sales. Some of the farmers worry that not castrating boars could bring problems with sexual maturity and aggression among non-castrated boars.

In 2009 castration will be totally banned in Norway. Already since 2002 Norwegian farmers need to call the veterinarian for surgical and anaesthetized castration of piglets in order to relieve pain and enhance piglet welfare. Most of the Norwegian farmers accept the new measure as a way to serve consumers’ wishes but doubt that it is in the best interest of the animal. In their view anaesthesia causes more handling stress, extra pain by injection and is no solution for post-castration pain. In addition, some farmers believe that piglets nowadays are often castrated at a later age as farmer like to collect enough pigs before calling the veterinarian. About a third of the Norwegian farmers think that animal welfare is even diminished as a result of the new procedures.

‘When I castrated the piglets myself, I did so within two to four days after birth. I did it very carefully and in my view operations went generally well – with little whining and I believe little pain. Today we try to do it gently, but I believe we actually cause the piglets more pain and distress. When the veterinary is going to do it, we first have to gather the piglets [...] I believe it is worse for a three week old pig to be castrated with so-called anaesthesia than for a three-day old piglet without anaesthesia.’ (Norwegian farmer)

### *Installation of Brushes*

This measure was discussed with Italian, Dutch, Norwegian and Swedish pig farmers. Overall there is little difference between farmers, neither across countries nor across schemes.

Most farmers doubt that installing a brush in the stable adds much to animal welfare. In their view pigs can scratch themselves on the walls in the stables. It is more important in their opinion to prevent itching by keeping pigs free of scale. But they do not really oppose to it as it does not require large investments.

### *Use of Fertility Hormones*

This topic was discussed with farmers in France, Italy and Sweden. Italian farmers in basic or top quality assurance schemes are more in favour of using fertility hormones than farmers in specific animal welfare or organic schemes. This can be explained by the fact that most farmers of the first group inseminate artificially whereas farmers of the second group uses natural insemination methods.

In France the situation is different as all farmers use heat-synchronising hormones and do not consider the use of hormones as harmful to animal welfare. Neither does it impose any risks to consumers in their view as there are no residues left in the meat. They compare fertility hormones to human anti-conception pills.

In Sweden farmers are against using hormones, except as a treatment for diseases. The use of hormones for other purposes than to treat diseases is prohibited in Sweden.

‘Hormones are totally wrong! I think it is neither good for animal or them who is going to eat the meat, if it is treated with hormones or if it has additions’ (Swedish farmer)

### *Use of GMO Feeds*

This subject was presented to farmers from Italy, France, Norway and Sweden. Whereas most of the French and Norwegian farmer oppose to the use of GMO feed, there is more division among Italian and Swedish farmers. In Italy farmers in basic quality assurance schemes are generally in favour of GMO feed whereas farmers in specific animal welfare or organic schemes generally object. In Sweden farmers in the basic quality assurance schemes were divided, some farmers are sceptical, others don't think GMO feed is a problem; Swedish organic farmers are against the use of GMO feeds.

### *Ban on Tail Docking*

Tail docking is not allowed in organic farming and the specific animal welfare schemes and generally prohibited by Norwegian and Swedish law. The issue was discussed with

farmers in Italy, France, Sweden and the Netherlands. In Sweden farmers feel that there is no need for tail docking when the production system functions well. Tail biting is in their eyes an indicator of a bad production system. In the other three countries pig farmers in specific animal welfare or organic schemes are in favour of banning tail docking. Farmers in basic or top quality assurance systems oppose a general ban as tail docking is seen as necessary for reducing tail biting. In their view banning tail docking is not in the animals' interest as the concomitant increase in tail biting will hurt the animal more than tail docking itself.

'Tail docking is a necessity; otherwise you get one big, bloody mess.'(Dutch farmer)

### *Ban on Tooth Clipping*

This practice is discussed with Italian, French, Dutch and Swedish pig farmers. The practice of tooth clipping is already prohibited by Swedish legislation, and most Swedish farmers agree with this ban. In the other three countries farmers in basic or top quality assurance schemes differ in opinion compared to farmers in specific animal welfare or organic schemes. Whereas the first group of farmer opposes to a total ban of tooth clipping, the second is in favour of banning. But compared to tail docking it is a less controversial issue. Many farmers have already stopped to systematically clip tooth in order to reduce infection risks and work load. Most farmers perceive tooth clipping as a curative method to be used occasionally a few times per years. When necessary it should be allowed is their view and a total ban could potentially be harmful for animal welfare and resulting in more problems for animal than the intervention of tooth cutting itself.

'Tooth clipping is something you only do when it is necessary, when you see that they start fighting. But that is may be once a month, in one pen. So it is not a routine practice here. But you shouldn't prohibit it, you should have the possibility to do it when it is necessary.'(Dutch farmer)

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## 19.3. CONCLUSION

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Concerning most issues we see a division between farmers in basic and top quality assurance schemes pleading for the continuation of current practises, and farmers involved in specific animal welfare and organic schemes being in favour of new and stricter regulations and measures. The farmers in the French top quality assurance scheme are an exception; they resemble more the farmers in the specific animal welfare and organic schemes than the farmers in the top quality assurance schemes in the other countries. In part this may be explained by the fact that the animal welfare specification of the French top quality assurance scheme comes close to the specifications in the

specific animal welfare or organic schemes. The different attitude towards animal welfare measures between the two groups of schemes may be explained by the fact that some of the new measures are in fact already implemented by farmers in specific animal welfare and organic schemes (and the French top quality assurance scheme), and policy changes does not affect their practice. This is not the case for most farmers in basic or top quality assurance schemes for whom new regulation result in either the need of new investment and increased costs or at least a change in farm management and daily practice.

There is also a clear link with farmers' definition of animal welfare and their attitude towards some of the new measures. This is most evident when housing systems and questions of hygiene are involved. Farmers explain their rejection of outdoor housing, for instance, by pointing at the loss of hygiene which would endanger animal health and consequentially negatively affect zoo-technical performance in their view. This argumentation is typical for farmers in basic and top quality assurance scheme who tend to define animal welfare in terms of animal health and production performance. As long as the animal is healthy and growing, the animal is supposed to feel well and animal welfare is considered to be assured.

Farmer in specific animal welfare and organic schemes, who are generally in favour of straw beddings, refer to the opportunity for expressing natural behaviour. These arguments fit perfectly well to their definition of animal welfare which focuses on the expression of natural behaviour. This consistency is of course not surprising but nevertheless important to keep in mind when considering farmers' attitude towards new regulations and animal welfare more generally.

## OFF-FARM ANIMAL WELFARE

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In this chapter we look into farmers' assessment of farm animal welfare off the farm and more specifically during transport and at the slaughterhouse. We discussed the level of animal welfare but also the division of responsibility on and off the farm.

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### 20.1. FARMERS' ASSESSMENT OF ANIMAL WELFARE DURING TRANSPORT

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Farmers across countries have similar ideas about animal welfare during transport. Most of them think that transport conditions have very much improved in recent years and that further improvement is not really required. As long as animals are not transported across too long distances, most farmers do not see any problem for animal welfare. British farmers have a slightly different opinion. They would like to ban long distant transports and they think conditions inside the vehicle must be improved.

'It does not really matter if a pig is being transported for two or twelve hours because they sleep, in difference to cattle that stand all the time. It is better to have 200 km to the slaughterhouse than 2 km so the animals can rest in between. We have a good standard on the trucks today. They have air suspension, different compartment level and good ventilation. Before it was closer between the slaughterhouses and much smaller farms, which made it take longer time to fill the lorry. Nowadays it is two or three stops before coming to the slaughterhouse. The time is more important than the distance. It is good as it is today. The existing problems are not on the chain of transport, but at the farm level. There are farms with loading systems not enough good. It is mainly good today. The farmers are ordered to arrange a flexible loading system from the stable, but there are no definitions how it should look like and we who have a good system do not get a cent for it.'(Swedish farmer)

Following farmers it is important that animals have enough but not too much space during transport. In addition, climate control and ventilation is considered as very important in order to avoid overheating. They also refer to water access (during long distance transport), partitioning of travel compartments and good loading facilities. Besides the skills of driver and staff in handling animals is considered crucial. Some

farmers point at the fact that the spreading of slaughterhouses impacts on the need for lengthy transports. Even when the distance between a farm and the slaughterhouse is short, the travel can be very long since transporters need to collect pigs from multiple farms in order to fill the vehicle before going to the slaughterhouse. To diminish the risk of spreading animal diseases, this practice has been banned in the Netherlands since the outbreak of pig fever in 1998. Most of the farmers consider animal welfare during transport as not their responsibility but the responsibility of transporters and more specifically the driver. Loading of animals is a shared responsibility in their view. Once the animals leave the farm, most farmers feel freed of any responsibility although some do refer to their moral obligation to hire a good and trustworthy transporting company.

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## 20.2 FARMERS' ASSESSMENT OF ANIMAL WELFARE AT THE SLAUGHTERHOUSE

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Most of the farmers have never been in a slaughterhouse and find it difficult to evaluate the level of animal welfare in slaughterhouses. Some farmers think that slaughterhouse personnel might treat animals roughly. Others expect them to treat animal well as stress negatively affects meat quality. They consider it in the slaughter's best interest to reduce stress to a minimum.

'It was really enormously good! No stress, calm and nice. There were air operated gates which slowly pushed the pigs towards the sedating basket They go down in baskets. Not a sound ... They send the pigs to sleep through carbon dioxide. Before they sedated with electricity and sometimes they missed and the pigs had to be taken up again ... that was not nice!' (Swedish farmer)

Farmers perceive the time between unloading and the actual slaughtering as crucial for animal welfare. In their view the time should not be too short to allow animal to recover from transport, but it should be avoided to keep the animals at the slaughterhouse overnight. Besides, pigs should be kept together in the same group from farm to slaughter line in order to avoid further stress. Finally good animal handling skills of slaughterhouse and transport staff are considered as very important.

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## 20.3. CONCLUSION

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Farmers across countries and schemes think similarly about animal welfare off the farm and during transport and slaughterhouse. They agree that this is not their responsibility beyond the selection of a reliable transport firm. They generally trust that animal

welfare is taken care of quite well already. The additional measures mentioned are generally in the line of existing regulations.



## FARMERS' EXPECTATIONS OF MARKET AND SOCIETY

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Besides farmers, other industries in the chain, retailers, consumers, government and animal welfare campaigners deal with animal welfare. During the interviews we asked farmers how they think about their involvement and efforts to stimulate animal friendly production methods.

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### 21.1 EXPECTATIONS OF CONSUMERS

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Most farmers across the six countries have not a very high opinion of consumers' concerns of animal welfare. According to them, most consumers are interested in cheap pig meat in the first place and hesitate to spend more money on products that are promoted as animal friendly. Most of the farmers do not believe that consumers are really interested in the origin of their food. They point to the ignorance of the average consumer when it comes to pig farming and its level of animal welfare. In the opinion of many farmers consumers are generally misinformed by bad publicity. Only a minority of the farmers believe that consumers are genuinely concerned for animal welfare. Most of them are organic farmers or farmers participating in specific animal welfare schemes.

'I think that the consumer doesn't care about how the pig has had it before the meat is on the plate when they stand at the meat-counter and buy meat from abroad, then they do not care ... As long as the pig is a pig the animal welfare is damn important, but the consumer doesn't care about animal welfare if the meat is in the meat-counter, in that case they hadn't bought imported meat. The consumer takes too little notice about animal welfare when they put the meat in their customer-baskets.' (Swedish farmer)

When asked how consumers could support animal friendly production methods, farmers plead for more consistency between moral concerns and actual consumption behaviour. Consumers should be ready to pay for animal friendly products and should become better informed about animal production and animal welfare. British and Swedish

farmers added that animal welfare could be supported by consumers by buying local products and not cheap imported meat.

When pig farmers' image is concerned, there is a clear division between farmers of different countries. Dutch, Swedish and Norwegian farmers expect their image among consumers to be positive whereas French and British farmers expect their image to be quite negative.

'People definitely have a bad image of piggeries because as soon as we want to expand or set up a pig farm, we get papers in our letter box and threats.' (French farmer)

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## 21.2 EXPECTATIONS OF RETAILERS AND ANIMAL FRIENDLY PRODUCTS

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Most farmers are sceptical about retailers' concern for animal welfare. In their view retailers are mainly motivated by profit maximization and do not really care about animals. In their eyes retailers like to advertise with animal welfare but do not actually want to pay more money for products from animal friendly production systems. The current efforts of retailers are perceived as mainly window-dressing meant to improve their public image, attract extra customers and realize extra profits.

'I almost think that they care only about the price.' (Norwegian farmer)

British and Swedish farmers are especially critical as a result of meat imports. They refer to retailers has maintaining double standards – demanding high standards for domestic production but in the same time importing cheap products from abroad and taking for granted that these are produced under low standards for animal welfare.

'[Supermarkets] let the [pig] industry down [by] being unwilling to reward farmers for extra costs, but will buy anywhere they can more cheaply without insisting on standards being maintained.' (British farmer)

Farmers believe that retailers can play an important role in stimulating animal friendly production because of their market power. When retailers were ready to pay a fair price for animal friendly products and to present and promote animal friendly products more effectively, they could really make a difference and push animal friendly production.

Farmers' belief in the chances of animal friendly products in the market differs considerably across countries and across schemes. The majority of French farmers doubt that such a label will sell. As there are already many labels in France, they expect the competition to be fierce. Besides, in their view animal welfare alone is too weak and a too abstract matter to convince consumers to buy the product. A small group of

French farmers see possibilities for a small niche market provided animal friendly labels are heavily promoted.

In Italy, the Netherlands, Sweden and Norway slightly more than half of the farmers believe that products with an animal welfare label has potential, provided the products are not too expensive. Again they foresee that it will concern a small niche market and require major promotion efforts. The other farmers do not believe that products with an animal welfare label will survive market competition because of the higher production costs involved.

'I once thought that it would be possible. But I changed my mind. Now I think: 'You can in good times but not in bad times.' (Dutch farmer)

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### 21.3 EXPECTATIONS OF GOVERNMENT AND ANIMAL WELFARE CAMPAIGNERS

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Most farmers want their governments to assure that European farmers have to comply with equal standards and to prohibit the imports of cheap foreign products, produced under lower animal welfare standards. In addition, it is the government's task in their view to inform the consumers correctly about animal welfare and animal friendly products. Besides, the government could provide economic incentives to farmers such as tax relief in order to promote animal friendly production.

The image of animal welfare campaigners is quite negative among farmers. Most farmers think that campaigners have little knowledge of farming. As a result they promote non-realistic demands for animal production. Farmers acknowledge that people can disagree with regular farming practises, but they consider many of the campaigners' activities as manipulative and excessive. In their view campaigners often misrepresent reality in order to create a bad image of farming. Farmers would like animal welfare campaigners to participate in an open discussion with the sector and to cooperate in solving animal welfare problems in the sector.

'It is people with limited experiences of animals. Many who are interested in animal welfare have dogs, castrated indoor cats in soft baskets, birds in cages and horses and they don't get an outlet for their natural behaviour. They put human feelings on animals and then it looks better with soft baskets.' (Swedish farmer)

'[About a campaign against the castration of piglets] They totally blow the problem out of proportion, and not only on the matter of castrating. The consumer is terrified, of course, but they never talk about solutions. They only release a balloon, bang, and that's it. I think that consumers forget about it real quickly.' (Dutch farmer)

But there is also a (small) group of farmers who appreciate animal welfare campaigners. Most of them are organic farmers or farmers who participate in specific animal welfare schemes. In their view animal welfare campaigners have an important function as guardians of animal welfare and as supporters of a more general switch in farming towards more animal friendly production methods.

‘They enabled progress and helped us switch to grouping of sows.’ (French farmer)

When comparing across countries it is notable that farmers’ perception of animal welfare campaigners is influenced by the level of campaigners’ activism. French and Italian farmers, for instance, speak in a less negative way about animal welfare campaigners compared to farmers in the other countries. A considerable part of the Italian farmers is not even aware of the existence of animal welfare organizations in their country. This is not surprising as activism of animal welfare campaigners is far less prominent in Italy as well as France compared to the Netherlands and the UK.

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## 21.4 CONCLUSION

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Farmers’ expectations regarding market and society vary little across schemes or countries. Most farmers do not trust consumers, retailers or animal welfare campaigners. Many of them feel under attack from various sides: animal welfare campaigners who approach them with unrealistic wishes and communicate unrealistic pictures of pig farming to consumers. Following farmers consumers claim to attach importance to animal welfare but don’t want to pay the higher price that comes along with it. Finally, farmers perceive retailers as using advertisements of animal welfare to attract consumers whereas they are not ready to pay farmers a fair price that would cover the higher costs of animal-friendly production. Especially in the UK, farmers feel forced to follow the stricter animal welfare rules, as retailers only buy domestic products produced under specific production schemes with stricter animal welfare specifications. This results in unfair competition according to farmers because retailers import cheaper products from abroad at the same time. Only a small group of farmers believe that consumers are genuinely concerned about animal welfare and appreciate the efforts of animal welfare campaigners. These farmers are mostly organic farmers or farmers operating in specific animal welfare schemes. But even in these groups of farmers they represent a minority.

The government could help to solve the problem as farmers believe. First of all, the government (either national or EU) should forbid the import of cheap products that do not comply with the national animal welfare standards. This would, in their view, result in a fair competition between farmers. Secondly, the governments should provide reliable and clear information to consumers about animal friendly production. In

addition, the government should ascertain that retailers do not use confusing or misleading labels or advertisement.



## CONCLUSIONS TO PART III

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### 22.1 CORRESPONDENCE AND DIFFERENCES ACROSS SCHEMES

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Farmers' readiness to enter animal welfare schemes and to accept and implement stricter animal welfare regulations is influenced in the first place by their definition of animal welfare and the importance they attach to it. Based on this research it is possible to distinguish between two groups of farmers. Both groups of farmers are fond of their animals and consider animal welfare as important. Both invest time and labour in good animal treatment and care. None of them tolerates mistreatment or neglect. Both of them are also convinced that their animal fare well. Both groups differ, however, in how they define animal welfare and which elements of animal welfare they prioritize above others. The first group describes animal welfare primarily in terms of animal health and thus the fulfilment of basic physiological needs. They consider animal welfare important for its impact on zoo-technical performance and, thus, economic results. The second group defines animal welfare as the animals' possibility for expressing natural behaviour and centres around the notion of freedom and comfort. For these farmers animal welfare is important for the animal itself and the farmer's moral obligation to take good care of his animals. But of course these farmers attach importance to production and economic performance as well.

The first, health related conception of animal welfare is used more often (but not exclusively) by farmers in the basic and top quality assurance schemes and by non-participants. The second conception of animal welfare, focusing on natural behaviour, is more often used (but not exclusively) by farmers in special animal welfare and organic schemes.

The same distinction can be made when it comes to assessing current and future animal welfare regulation and farmers' readiness to implement stricter measures in the future. Overall it can be said that farmers who are already engaged in more animal friendly production methods as a result of their participation in specific animal welfare schemes or organic farming think positively about regulation and are in favour of a further tightening of legislation. Their positive attitude towards animal welfare and change towards more animal friendly production methods can in part be explained by the fact that they themselves are already ahead of national legislation. Further tightening will hardly affect their daily practice.

The farmers of the first group oppose to a further tightening of animal welfare regulations. They worry about the cost-effectiveness of further investments and about the effect of the proposed measures on improving animal welfare. But many of them feel also under attack from various sides – consumers with unrealistic wishes they don't want to pay for, the government who continuously produces new regulations and retailers who oblige them to follow stricter rules but at the same time import cheap meat from abroad. In this group the proposed additional animal welfare measures sometimes conflict with the farmer's definition of animal welfare.

The two groups of farmers differ also with regard to the market on which they operate and different concepts of quality in use there, and their overall production-logic. Farmers who work in a basic or top quality assurance scheme depend on conventional markets, where quality is primarily determined by sensory characteristics of meat quality. Farmers who produce for a specific animal welfare or organic scheme, managed to enter a niche market. In this niche-market naturalness is accepted as adding to quality and worthy of extra payment.

It is thus not only a question of ethical standpoint that distinguishes farmers working in different type of animal welfare schemes. Neither is it a question of more or less compassion for animals or importance attached to their wellbeing. Underneath their different attitude towards the animal welfare issue, lies a more fundamental difference in agricultural production logic. Defining animal welfare primarily in terms of animal health and zoo-technical performance makes sense in a context where agriculture is valued by its production efficiency and being a good farmer by production quantity. When the objective of agriculture is more broadly defined and includes issues such as care for nature and environment, as for instance in the organic scheme, the definition of good farming and good animal welfare will concomitantly change as well.

In this context it makes much more sense to take natural behaviour into account and to consider 'naturalness' as a valuable result. Specific animal welfare schemes and organic farming provide a context where such behaviour is stimulated and rewarded. Basic and top quality assurance schemes are part of the traditional agricultural production logic and provide no incentives for a change in attitude or behaviour. Quite on the contrary farmers in these type of schemes are almost obliged to follow their traditional path as they have to pay for new investments that add neither economic value to their products nor to animal welfare in their view. The markets where their products are sold are generally not ready to reward their engagement by premium prices.

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## 22.2 DIFFERENCES ACROSS COUNTRIES

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Next to the difference across schemes characteristics of the national contexts can explain some of the differences between farmers for what concerns their attitude

towards animal welfare schemes and measures. In part these are linked to the occurrence of animal welfare schemes as has been explained in Chapter 2.

Norway and Sweden provide a specific context as animal welfare is strictly regulated by law and only few animal welfare schemes exist. In Norway many of the farmers did not feel that that animal welfare needs further improvement as they believe that animal welfare is well assured by Norwegian law. Many of the Swedish pig producers said they would like to develop animal welfare further, also because they believe that a good animal welfare is beneficial for zoo-technical results. But they don't think it is realistic to do this today. They reckon that the consumer is not yet prepared to pay extra money for animal welfare and they worry about unfair competition from abroad. Since Swedish farmers have to compete with other countries, they think that Sweden can not go on improving animal welfare until the other EU countries have accomplished the same animal welfare standards as Sweden. Farmers in both Norway and Sweden believe in their countries' tradition of regulating public concerns by way of the government and if necessary by law.

The other four countries are proponents of a more neo-liberal governance style where public issues are more and more often resolved by way of the market. As a result, animal welfare schemes are more prominent at least there where public interest in animal welfare is high enough to expect sales of animal friendly products to be successful. This is the case in the Netherlands and the UK and to some extent France. As public concern seems to run low for what concerns animal welfare in Italy there is little need for the market to develop initiatives so far.

The UK represents another special case as a country with both a well developed level of animal welfare legislation and has well developed in terms of prominence of animal welfare schemes. In the UK farmers are also especially under pressure – socially but also economically since British retailers only accept domestic pig meat that is produced under the specifications of the British top quality schemes. This may explain why UK farmers in specific animal welfare schemes are more pessimistic for what regards the profitability of animal friendly products compared to their colleagues in other countries.

Whereas UK, Sweden and Norway are to some extent comparable for what regards their relatively high level of animal welfare regulations, their markets differ quite substantially. The Norwegian market is protected by not being an EU member and import of meat is low (see also Murdoch, 2005). In Sweden some meat is imported but the level is relatively low, certainly when compared to the situation in the UK where the amount of pig meat imported is much larger than the amount of meat from domestic production.

Concluding it may be said that besides national characteristics for what concerns size and organization of the sector, political differences proof to be important as well. This regards differences in animal welfare regulation and governance styles but also structure and organization of markets. In short, it is not only a question of UK farmers behaving differently compared to Swedish farmers. More important is that the different organization and regulation of animal welfare either by way of the market or by way of the state influences the frame of reference of farmers, their attitudes and perceptions and

ultimately their perceived behavioural opportunities and choices. Regulating animal welfare by way of the market offers some farmers the opportunity for distinction in the market. They can promote their products as being more animal friendly than regular products, and, thus, worthy of premium prices. How many animals will be reared under this improved conditions, will depend on their success in the market and, thus, put simply on retailers' readiness to sell and consumers' readiness to pay. When animal welfare is regulated by the state and by way of strict animal welfare regulations all farmers have to comply and the welfare of all animals will consequentially improve. The possibility to sell those products and to cope with the competition of foreign products depends among others on the openness of the national market. So far farm animals seem to fare better in Sweden and Norway but the question is how long both countries will be able to keep their higher level of animal welfare under the conditions of the open markets.

## PART IV

# CONSUMER OPINIONS ON FARM ANIMAL WELFARE: METHODOLOGY AND SAMPLING OF A QUANTITATIVE SURVEY IN SEVEN EUROPEAN COUNTRIES

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## INTRODUCTION TO PART IV

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This report deals with methodological questions related to a quantitative survey of public opinions on farm animal welfare and how those opinions are linked to purchasing practices.

Earlier studies have indicated that animal welfare can be of considerable concern among consumers. Food quality is not only determined by the overall nature and safety of the end product but also by the perceived welfare status of the animals from which the food is produced. The Welfare Quality project aims to accommodate societal concerns and market demands, develop reliable on-farm monitoring systems, and develop product information systems and practical species-specific strategies to improve animal welfare. Throughout the project, efforts are focused on three main species and their products: cattle (beef and dairy), pigs, and poultry (broiler chickens and laying hens). The information systems will be based upon consumer demands, the marketing requirements of retailers and stringent scientific validation.

In order to develop such systems, better knowledge of public opinions on farm animal welfare and the links to purchasing practices are important. At the same time, it is realised that both opinions, markets and welfare conditions may vary significantly across countries. To this end, comparable population surveys have been carried out in European countries; Hungary, Italy, France, the United Kingdom, the Netherlands, Norway, and Sweden.

General methodological considerations in designing the survey were to ensure:

- high quality, reliability and comparability of the results;
- sampling methods and response rates that could give sufficient representativeness;
- validity of the questionnaire; and
- high cost-effectiveness of the total process.

The aims of this technical report are twofold. First of all, it presents basic documentation of sampling and data collection procedures to be used as a reference for the publication of results from the survey. Second, the report provides descriptions and considerations for later discussions of methodology, enabling quality checks, etc.

Carrying out comparable population surveys in seven countries is a highly complex task. We will give an overview of the design and data collection process. We will also discuss some validity problems encountered regarding some of the questions.

In chapter 24 we will discuss the planning and design of data collection procedures. The chapter deals with the choice of method, i.e. telephone interviews, for the survey, items to be covered and the design of the questionnaire, criteria for selecting the poll institute, and the evaluation of the pilot interviews. Chapter 25 describes the sampling method, the weighting procedures, and evaluation of the representativeness. In Chapter 26, some important issues are raised regarding the validity of some of the questions from the survey. Appendix 3 presents the specifications that were presented in the call for tender for sub-contractors. Appendix 4 presents, first, the questionnaire in English and, second, the instructions to interviewers.

## PLANNING AND DESIGN OF THE DATA COLLECTION

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### 24.1 WHY A TELEPHONE SURVEY?

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There are several social scientific methods for collecting quantitative data on opinions and practices. Traditionally, surveys have been implemented by *postal questionnaires*, *face-to-face interviews* and *telephone interviews*. Some new methods conducting surveys are Interactive Voice Response (IVR) and Internet surveys (web) (Dillman et al 2001). In the Interactive Voice Response survey the stimulus is aural, but the question is pre-recorded, and the respondents answer is not given to a real person. There is still insufficient experience with this method, and it would have been regarded as too risky to be considered for this survey. A web solution was not considered at all, because the availability of Internet is not sufficiently widespread yet for ordinary consumers. Postal questionnaires were also rejected, first of all because of the risk of low response rates. It is also overall quite time consuming. Face-to-face interviews were considered, and might have been a serious option for the data collection. Face-to-face interviews can give high response rates and good quality data. When this was rejected too, the reason was because of time use and costs. We were short of time. This kind of interviewing normally takes a long time to conduct. They are also relatively expensive, and they would have been too costly for the sample sizes that we needed for statistical reasons.

Telephone interviews were the method of choice, because of time efficiency and an acceptable level of costs. Telephone interviews have some disadvantages; the questions have to be pre-coded, there are few possibilities for spontaneous answers, and the questionnaire cannot be too long. However, one important advantage with this kind of survey is the possibility of closely controlling the data collection, including the monitoring of the actual interviews. This was especially important for ensuring comparability, since the survey was conducted in seven very different countries.

Data were collected through a CATI survey, i.e. Computer Assisted Telephone Interviews, conducted by TNS. This provides standardised, monitored interviews. The whole interview is not supposed to exceed 20 minutes, including the introduction of the theme. Considering the number of countries, the relatively large total sample size, and the length of the interviews, it was unfeasible to include open-ended questions. That would also have required extensive resources for codification and preparation of the data files for quantitative analyses.

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## 24.2 ITEMS TO INCLUDE IN THE SURVEY

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Ahead of the quantitative survey, focus group interviews were conducted in all seven countries.<sup>23</sup> The experience from these group interviews was very helpful when developing the questionnaire for the survey. The work on developing the questionnaire started in February 2005. In April 2005, potential dimensions to be included in the questionnaire were presented to the working group WP1.1.<sup>24</sup>

Seven main items were suggested.

1. Consumption practices, eating and shopping:
  - frequencies of eating different products;
  - vegetarianism;
  - eating preferences – likes and dislikes – cultural specialities (frogs, wild animals, etc);
  - reason for not eating certain products (not included in the main survey);
  - changes in the consumption of meat (not included in the main survey);
  - important parameters when buying specific products (choose a few products);
  - shopping practice, where the products are bought (gives a picture of the retail structure in each country);
  - if, or where, organic products are preferred bought (relation to the distribution system);
  - important parameters for organic products.
2. Information:
  - information preferred: labelling – what kind of information is important and what is not;
  - information behaviour: to what degree the consumers checking existing labels (not included in the main survey);
  - if information of animal welfare is wanted – where prefer to get the information from.
3. Knowledge and experience with animals:
  - some knowledge question of farm animals, what is legal and what is forbidden? (not included in the main survey, not feasible)
  - any close contact with farm animals during childhood and/or later in life
  - hunting practices (not included in the main survey)
  - have any domestic animals (pets) (not included in the main survey)
4. Concerns regarding animal welfare, uncertainty and dilemmas:
  - general question: how important is the question of farm animal welfare for you?
  - what are the most important farm animal welfare characteristic? (not included in the main survey, not feasible);

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<sup>23</sup> The report from the focus group interviews is forthcoming.

<sup>24</sup> At a project meeting in Toulouse, 11–13 April 2005.

- perceptions of farm animal welfare in your own country – present a list of characteristics
  - perceptions of how different farm animals welfare are situated in your country
  - perceptions of farm animals welfare in your own country compared to other European countries (not included in the main survey, not feasible);
  - perception of farm animals welfare in the past compared to now;
  - perception of what farm animal welfare can affect (like human health, taste of the product, production volume, illness etc);
  - attitudes towards animals;
  - conscious or alienated;
  - what is acceptable and what is not?
5. Trust relations and social division of responsibility:
- how serious different actors in the food chain are handling farm animals welfare;
  - how serious the authorities are handling farm animal welfare;
  - how serious the consumers are handling farm animal welfare;
  - who should be responsible for farm animals welfare (not included in the main survey, not feasible);
  - truth-telling – who would tell the truth in case of a food scandal?
6. Consumer Agency and mobilization:
- voice and exit;
  - who can influence farm animal welfare – in case of bad welfare? Consumer boycott, authorities, animal protectionists ... (not included in the main survey, not feasible);
  - political consumer activism.
7. Background variables:
- age;
  - gender;
  - education;
  - occupational descriptions;
  - place of residence;
  - region;
  - household composition (number of children, marital status);
  - religion (which religion and frequency of attending religious services).

Some of the participants missed questions about labelling, willingness to pay, and attitudes towards the expert's 10 principles of animal welfare.<sup>25</sup> Among the background variables income question were missing. All these questions were included in a further developed version of the questionnaire. However, some of them had to be excluded before the main survey because of the length of the questionnaire and because of some of them were not feasible.

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<sup>25</sup> 1) No prolonged hunger or malnutrition; 2) no prolonged thirst; 3) physical comfort; 4) good health: no injury; 5) good health: no disease; 6) absence of intense or prolonged pain (not caused by injury or disease); 7) possibilities to express normal/natural behaviours: social behaviour; 8) possibility to express normal/natural behaviours: other than social behaviour; 9) absence of negative emotions in relation to humans; 10) absence of negative emotions in relation to other animals.

However, before piloting, we had to reduce the number of question because the questionnaire became quite too long.

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### 24.3 CALL TO TENDER

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In May 2005 Cardiff University in England sent out a Call to tender to several opinion poll agencies (see Appendix 3). This Call to tender had specific requirements to be fulfilled by the agency chosen. In addition to cost estimates for different sample sizes and time frame, these requirements were meant to ensure high quality data, like monitoring and quality assurance procedures, sampling and response rates, specification of partners in all countries, etc.<sup>26</sup> The tendering process was organised in accordance with EU regulations for subcontracting.

Regarding the criteria for selecting the best offer, it was emphasised that all requirements in the specification should be met, including the ability to:

- demonstrate appropriate previous experience with CATI surveys,;
- demonstrate appropriate previous experience with cross-country population surveys (examples required);
- demonstrate appropriate previous experience with contracts made for social scientific research projects (references, contact persons required);
- demonstrate established collaboration, including management and communication procedures with affiliate polling institutes in the selected countries (examples required);
- demonstrate a track record of very high quality and good management in this type of study;
- comply with all the procedural requirements in this Specification;
- all other criteria being satisfactory, price will be decisive.

Six agencies had delivered an offer on the closing date. The agencies were evaluated according to management/communication, experience, quality assurance schemes, timing, sampling procedure, and costs. Based on an assessment of which company could best meet all these requirements, TNS was selected. One additional benefit was that TNS had affiliates in all the countries in the survey. TNS UK managed and coordinated the survey. After completing the survey we have experienced that this company carried out the survey in a most satisfactory way.

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<sup>26</sup> Ref No: Spec161/Welfare/SH/0605.

#### 24.4 PILOT AS A STEP IN DEVELOPING THE FINAL QUESTIONNAIRE

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Pilot interviews are important in order to ensure that questions are understood (in the respective languages), to get an impression of how the whole questionnaire structure works, and to check the length of the interview. It was decided to carry out 25 pilot interviews in each country. Before the pilots, our partners in WP1.1 were invited to discuss the questionnaire, and we received many constructive suggestions. One major challenge was not to exceed the maximum length of 20 minutes, and thus to prioritize the key questions. Before the piloting started, it was decided to exclude the questions on knowledge for methodological reasons. It is difficult to formulate good and simple pre-coded knowledge question about animal welfare in different countries where the context and people's experiences are also very different.

The translation process went on in several stages. The master questionnaire was English. Professionals first translated this into the respective languages. It was then back-translated, and, last, either some of our project partners checked the language, or persons we knew could the language and issues related to food consumption. The questionnaires from the different countries were all confirmed by SIFO, prior to running the pilots.

The pilots were carried out between 12 and 25 August, first in the United Kingdom, then Norway, and finally the other five countries. The pilots were finished ahead of schedule. We were aware that we would be short of time for the main surveys if not.

The pilots were extremely useful for developing the final questionnaire and all interviewer feed-back has been fully utilised. The evaluation of the pilot interviews revealed many problems we had to solve. These experiences and considerations are important for interpreting the results from the survey.

First, it was still too long. Average time use for all countries was 23 minutes (contact the respondents and interviewing). The duration varied across countries, largely as a result of language. The total interview time (contact plus interviewing) should not exceed 20 minutes. We had to cut.

Some questions regarding purchasing were considered repetitive and boring for the respondents to answer. These questions were reduced in number.

Some constructs or words were not clear enough for the respondents. Bacon and ham is not common in all countries, we had to change to bacon and/or ham. Eggs from free range chicken indoors or outdoors were too complicated; we had to put them into one category: free range.

Some questions gave little meaning for the respondents. The question "How important is it to include the following information about animal-based products on the label? On a scale from 1 to 5." This was too hard to answer. We changed the question to:

“Thinking generally again about food from farm animals, is it very, fairly or not important to include the following information on the label?” (Appendix 4, q12). And the same with q13 : How helpful would the following sources of information be when buying farm animal products, on a scale from 1 to 5.....”. This was changed to a Yes-No question: “Thinking about information on farm animal welfare, would you use the following sources of information if available?” Yes or No, and became much easier for the respondents to answer.

The most difficult question for the respondents to understand was related to the scientific animal welfare principles; “Experts on animal welfare have formed some principles that are important for farm animal welfare. How important or not are the following principles for you?” The basic principles of freedom from hunger and thirst, etc. were too consensual and would give little meaning to include in a population survey. We therefore started out with principles that might be more uncertain or controversial. Five principles were presented – 1) groom each other, 2) explore and express curiosity, 3) free from fear and distress in their contact with humans, 4) free from un-necessary pain at the slaughters and 5) free from fear or distress when in contact other animals). Most of the countries reported that these questions were peculiar and not understandable, causing confusion and uncertainty throughout the piloting, both among the respondents and the interviewers. It seems very difficult for people, first, to think that these are evaluations made by experts and, next, to assess issues that many have never thought about. Results from these questions would be too unpredictable and very complicated to interpret, especially as this is a comparative analysis. The validity would have been poor. It does not mean that these issues as such are left out, as most of them have also been covered elsewhere in the questionnaire. As the link to experts is strongly emphasised in the focus group interviews, this is also a point where it is urgent to combine the two different types of data. In Toulouse, the comments on expert evaluations were that people generally seem to trust - and thus accept - experts and what they have to say about animal welfare. And the trust issue is covered even in the survey with a particular reference to animal welfare. For these reasons we decided to drop this battery of questions, concluding that these questions did not work in a quantitative telephone survey.

Another problem was the income question. We decided to ask for the household’s monthly net income, as taxes vary quite a lot between countries. We also decided to ask for the exact amount (circa). If they did not or could not answer that, the respondents were presented for brackets with particular income ranges. It was very difficult to find brackets which could be used in all countries, without having too many odd intervals. In addition, some countries had not suitable brackets at the bottom end of the scale (Hungary) and others were lacking at the top (Norway). D7 became a question with some adjustments – hoping that most of the respondents would answer the unprompted question D6 (Appendix 4).

Several countries had problems with the concept “farm animal”. In Norway there is a clear concept, which is “husdyr”. However, this was misunderstood by the respondents, because they also included pets in this term. We had to construct a new word, which is not officially correct, but it was understood by the respondents, and that was “landbruksdyr”. Sweden (used “lant-gårdsdjur”) and the Netherlands (used

“boerderijdieren”) had some of the same problem, and was solved in the same way as in Norway.

We found the pilot extremely useful for developing the final questionnaire (Appendix 4 – The master questionnaire – used in the United Kingdom).



## SAMPLING

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### 25.1 THE SAMPLING PROCESS

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Each country<sup>27</sup> was responsible for sourcing its own sampling frame. In each country, national directories were used to source telephone numbers. In all cases, except Norway where the sampling frame included mobile phones, only landline telephone numbers were listed. The directories were used to build a representative sample of households in terms of national geographic variables: region, city/town size or post codes.

A probability sampling technique was selected. Although potentially difficult to execute, it re-quires time, resources and careful management, this technique supports the need to project survey results onto the wider population of each country. The probability technique adopted for this survey was a random sample with a systematic approach to participant selection.

Numbers were selected randomly, using Random Digit Dialling (RDD)<sup>28</sup> and the respondents were selected using the systematic approach known as ‘the first birthday rule’.<sup>29</sup> The simplest way of applying this rule involves asking to speak with an eligible person (aged 18–80 years) in the household with the first birthday following the point of contact. In an attempt to save time and minimise introductory questions, TNS used a variation of this traditional first birthday rule.

The first birthday rule applied for this survey takes advantage of the fact that the majority of households have two or fewer adults. The rule applied aims to limit intrusive questions that may impact upon response rates. On contact with an eligible adult aged 18–80 years, that individual is asked how many adults aged 18–80 years live in the household. If there is only one eligible person in the household, the screener respondent, the interview continues with that individual. If there are two eligible respondents, the CATI system randomly selects either the screener re-spondent or the other eligible adult.<sup>30</sup> Only if there are more than two eligible adults does the se-lection process proceed based on applying the first birthday rule. The selected respondent cannot be replaced by another eligible person in the household.

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<sup>27</sup> This part is taken from TNS Social: Welfare Quality Survey: Methodology and Technical Report. December 2005. This TNS report will only be of internal use.

<sup>28</sup> In Norway, households were selected proportional to household size.

<sup>29</sup> In some cases, the last birthday rule was applied – same principle.

<sup>30</sup> The Netherlands adopted a different approach by requesting the youngest eligible person.

As already mentioned; as a result of the pilots the questionnaire was re-edited (Appendix 4). Again it was translated from the English master questionnaire to all languages, back-translated and checked by each country. SIFO confirmed the very last versions. About 1,500 respondents in each country were randomly selected, aged between 18 and 80 years.

Each number was called back up to 10 times before a number was recorded as being of 'no contact' and 'unknown eligibility'.

Table 25.1 reports key figures for the seven sub-samples used in this report. The source for all of them is a national pool consisting of a large amount of telephone numbers. Respondents are drawn at random from this pool until the desired amount of interviews is completed. Using Hungary as an illustration, the Hungarian pool or base sample consists of 6,730 telephone numbers, from which a gross sample of 3,640 numbers was needed to complete the 1,500 interviews. In Hungary 41 per cent resulted in an interview. In total, for all countries, 17 per cent of the gross sample actually resulted in an interview, leaving us with a response rate equal to 0.17 and a corresponding drop-out rate of 0.83. This is a normal response rate for this type of data collection (see e.g. Poppe and Kjærnes, 2003).

TABLE 25.1 The national sub-samples, 2005.

	Hungary	Italy	France	UK	Netherlands	Norway	Sweden	Total
Sample base <sup>1</sup>	6,730	18,875	12,429	29,986	20,486	20,987	5,371	114,864
Gross sample <sup>2</sup>	3,640	7,441	9,143	8,880	5,248	17,311	4,616	61,594
No. of interviews	1,500	1,501	1,503	1,475	1,503	1,500	1,525	10,507
Response rate % <sup>3</sup>	41%	20%	16%	17%	29%	9%	33%	17%

Notes: <sup>1</sup> pool of telephone numbers from which the actual sample is drawn; <sup>2</sup> sample base minus non-used numbers (number obtainable, fax/modem, business, out of scope (household aged below 18 or over 80); <sup>3</sup> the number of completed interviews divided by the gross sample size.

The main interviews were conducted in the period of 12–27 September 2005 (Norway started on the 14th because of an election for the Parliament). TNS delivered the data the 14 October. The short period of fieldwork was intended, because we wanted to avoid the possibility of a welfare animal scandal should occur and influence the answers. The respective national partners were to monitor the public debate, particularly media coverage, during the period in question. To our knowledge, no such scandals were on the agenda immediately preceding or during this period.

Deciding the sample size, we do not pay attention to the number of citizens in each country. This is because there is almost no correlation between the population size (the universe) and the sample size. Each country is treated as separate populations and representativeness is based on statistical considerations rather than population size. The decision of the size of the sample is based upon the confidence limits we want the estimates to operate within. With a sample of 1,500, a confidence interval of 95 per cent

probability, and a 50/50 distribution,  $\pm 2.55$  per cent units is accepted. This means, in the interval between 47.45 and 52.55 per cent proportion, it is a 95 per cent probability of finding the true population parameter (the square root of  $(50*50/1500) * 1.96 = 2.55$ ). Inferential statistics are influenced by the sample size, and it is important to compare significance tests between the different countries. Comparisons of tests across countries are therefore difficult if we operate with different sample sizes. This is the main reason for having equal sample sizes across all countries.

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## 25.2 WEIGHTING PROCEDURE

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Although the sampling technique aimed to minimise sample error, weighting was necessary to correct for the probability of selection according to household size (otherwise those living in large households would be underrepresented) and non-response. In some countries, it is becoming harder to achieve interviews with certain groups, particularly younger males. Research fatigue is evident with many members of the public simply refusing to consider taking part in surveys.

TNS Social sourced all data for these weighting factors. This approach ensured uniformity of the method for collecting data (it was essential that national statistics were collected for the population aged 18–80 years only) and crucially it ensured uniformity in the method of calculating and applying the weights.

Age, gender, region and household data for the target population in each of the seven countries was sourced from official national data sources. The national data were then compared with the achieved sample to determine which corrective weights were necessary.

TNS Social in collaboration with TNS UK's statistical services specialists applied interlocking weights on the Weight 1 factor for all countries. A cell matrix was designed based on interlocking data with actual data compared with target data.

The second weight was problematic as household data could not be sourced to the level of detail necessary to meet sample criteria. In most countries, data exists for all persons in households or all adults in household, typically 16+ years. Data for each country could not be sourced for household members aged 18–80 year olds. With this consideration, target data was calculated on the basis of known data.

The household factor was not necessary for all countries. In Norway, there was no need to adjust for a household factor as the Norwegian sampling process ensured that data were already representative of the number of persons in the household. In the analysis for France, Italy and the Netherlands, the household factor was deemed unnecessary because the interviews achieved broadly represented the actual household composition.

In the United Kingdom, Hungary and Sweden, the household factor was applied, as in each case; one-person households had been underrepresented.

Consequently, the samples were weighted by region, sex, age and household size in some of the countries. This weight is genuine for each country. That means we have seven different populations and seven different samples with equal sample size.

In most of the analyses in this project, results are compared between countries. If some of the analyses should be carried out for the seven countries treated as one population and one sample, the results will be corrected for the fact that different population size could influence the outcome. Data from each country will be weighted in proportion to this country's share of the total population size in all countries. If this weighting is not done when treating the sample as one sample, each country will have equal influence of the average results (because the sample sizes are equal). This is also a possible solution, but should be made explicit for every presentation of TOTAL distributions. However in a very few analyses there is a need to look at all seven countries together treated as one region. In these latter cases, we will weight the data by region, sex, age, household size and population size in each country (persons between 18 and 80 years). In this case we will consider all the seven countries as one population and our samples as one sample.

TABLE 25.2 The seven countries as one population, the distribution of the population size (age 18–80)

	Frequency	Percentage
HU	506	5
IT	2,927	28
FR	2,943	28
UK	2,700	26
NL	783	7
NO	214	2
SE	427	4
Total	10,500	100

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### 25.3 REPRESENTATIVENESS OF THE SAMPLES

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In this part we will show some of the distributions of the demographic variables. They are all weighted, and should give a picture of the official statistic in the various countries.

SIFO has checked the representativeness of the sample by comparing the distribution of sex and age with official statistics in the different countries and the weighted results seem quite satisfactory.





## VALIDITY

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Validity is crucial when operationalising research questions into pre-coded telephone question-naire questions. Validity problems are particularly challenging since we are dealing with seven different national contexts with varying cultural characteristics, market structures, consumption habits, and public discourses. The questionnaire should in principle be exactly identical in all seven countries. However, we are fully aware of the fact that the questionnaire is presented to people with different cultural intent and institutional settings, and where the words, although carefully translated, may have diverse connotations. On the one hand, this is precisely the intent of this WELFARE QUALITY study, and the questionnaire was carefully constructed to meet this challenge. On the other hand, we can of course not preclude the possibility that some questions are interpreted differently across national and cultural settings. We must also take into consideration when interpreting and analysing the results that animal welfare represents a “good cause”, which may push the respondents towards giving politically or ethically “correct” answers rather than expressing personal doubts or “unacceptable” habits.

We will in this chapter evaluate some of the questions from the survey according to validity issues. Validity is a term to describe whether a measurement instrument or test measures what it is supposed to measure (Vogt, 1993). In other words, validity indicates whether the operationalisation of a question is in accordance with the theoretical construct it is supposed to measure.

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### 26.1 EATING PRACTICES IN THE SURVEY – ARE THE RESULTS PLAUSIBLE?

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Eating practices are patterned very differently across countries. For the interpretation of the analyses, it is crucial that recorded variations in this survey are in accordance with other types of information on eating patterns. One set of questions in the survey is the frequency of eating various meat items. We have chosen to compare this with available statistics on gross production, kg of the whole animal per capita. This measurement is not consumption, even if that’s it what it is labelled. However, the advantage of using these total data is that they are comparable between the countries, and give a rough picture of the variation in consumption between the countries. Of course these figures

cannot be compared directly. We are interested in whether the tendencies of relative distributions between types of meats and the relative levels of consumption between countries.

In order to compare the distributions for our questions with official statistics, we have chosen chicken, pork and beef. In our questionnaire we asked for the frequency of eating a number of meat items; chicken (q5.1), bacon and/or ham (q1.3), sausages (any kind) (q1.4), pork (q1.5), and beef (q1.6). Since bacon and/or ham is a pork product, and pork is pork, we computed an index of these two variables; the proportion of those who ate these products weekly or more often, either one of them or all. Sausages were not included, since they may contain several types of meats.

There are some variations between the countries; Hungary, the United Kingdom and the Netherlands eat chicken fairly often. Compared to other types of meat, eating pork is most common in almost every country, except Norway. Eighty-six per cent eat pork weekly or more often in Italy, 83 per cent in France, 78 per cent in the Netherlands, 77 per cent in Hungary, 76 per cent in Sweden, 75 per cent in The United Kingdom, while “only” 65 per cent in Norway. Beef is most frequently eaten in France, Italy and the Netherlands, to some extent in Sweden, the United Kingdom and Norway, and very seldom in Hungary.

We have compared these figures on eating frequencies (Figure 26.1) with the total production of these kinds of meat; called kg per capita supply (2002) (Figure 26.2). The variations between the countries for the various measurements of consumption are to some degree the same. The average consumption of poultry per capita is higher in Hungary, UK, France and the Netherlands than the other three countries (Figure 26.2). This pattern is almost the same as for the eating frequencies (Figure 26.1), except for Italy, which has a higher proportion of eating chicken compared to France, but lower average poultry consumption compared to France. It is important, however, to be aware of that poultry as measured in the kg consumption per capita has a wider definition than chicken. Pork consumption per capita is highest in the Netherlands, Italy, France and Sweden, and lowest in Norway. The same tendencies are reflected for eating frequencies. Beef and veal consumption per capita is highest in France, Sweden and Italy, low in Norway, and very low in Hungary. Beef/veal consumption per capita shows very high level in the Netherlands compared to the two other meat products, poultry and pork, which is not reflected in the eating practice data. However, again, beef/veal is a wider category than the eating practice category which was just beef.

In total, the overall shapes of the two charts show many of the same tendencies, even though the data are very different. Our conclusion is therefore that the quality and the validity of the eating practice data are acceptable, as they do not show any “odd” pattern compared to the data on an aggregate level.

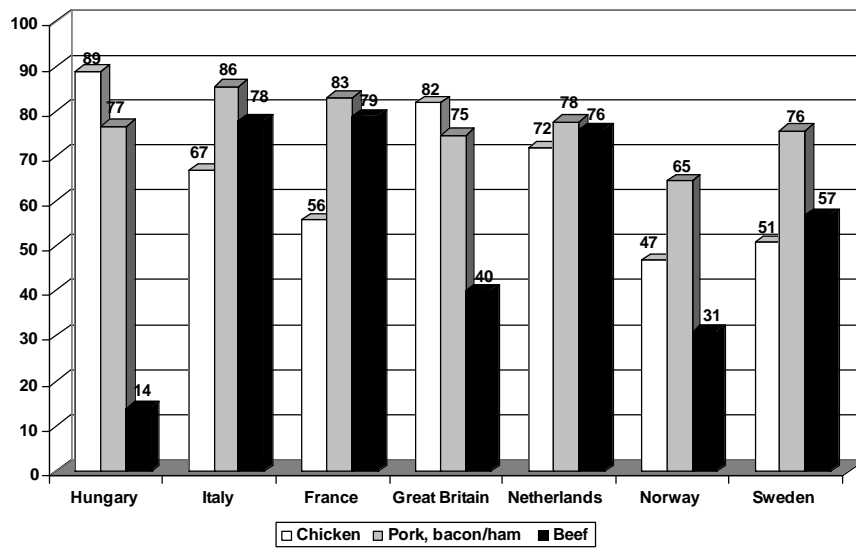


FIGURE 26.1 Eating practice, proportion eating chicken, pork and/or bacon and/or ham and beef weekly or more often (2005)

Note: Pork, bacon and/or ham is an index of two question – q1.5 and q1.3, where the proportion show if the respondents eat pork and/or bacon and/or ham weekly or more often. The remaining group summarized up to 100, shows those who eat all these products less than weekly.

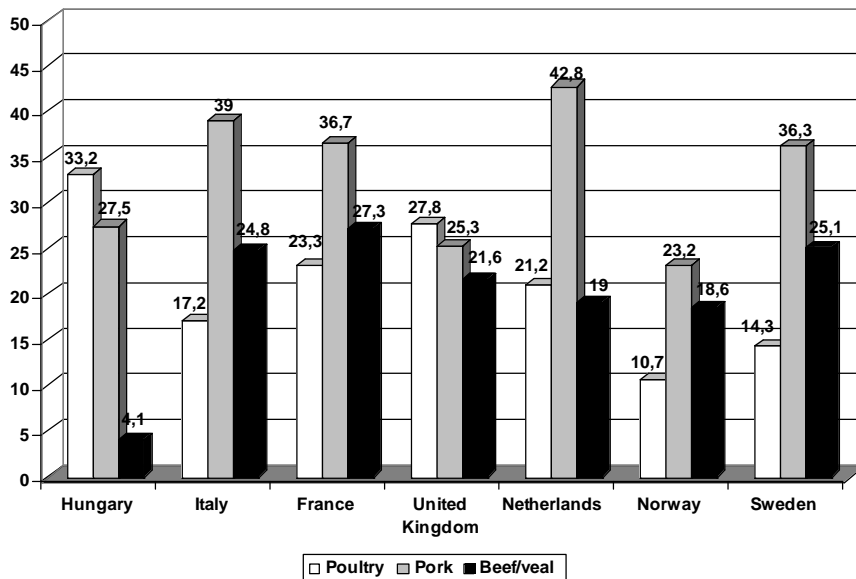


FIGURE 26.2 Meat consumption, kg per capita (domestic) (2003)

Note: Pork consumption in Hungary is not comparable with the other countries, because pork do not include lard.

Sources: The national statistical bureaus; food balance sheets.

## 26.2 VEGETARIANISM HAD A TOO RESTRICTED FILTER

In q2 we asked “Do you consider yourself to be a vegan (that is, you do not eat eggs or dairy products or any foods of animal origin), total vegetarian (you eat dairy products but not fish or meat at all, partial vegetarian (you do not eat meat regularly but you can eat fish or you eat meat very occasionally)”. This question was filtered from q1, those who had answered less often and never in q1 to all meat options (chicken, bacon and/or ham, sausages, pork, beef) should answer q2 – the vegetarian question.

However, this filter seemed to be too restrictive, as very few became included in the vegetarian category. For example, in The United Kingdom only 3 per cent claimed themselves to be a vegan or vegetarian, while other studies estimates 8 per cent (Kjærnes et al., 2005). All respondents should have been asked this question, because there are degrees of vegetarianism. We therefore computed an index of the meat eating question – q1, giving those who had answered daily, several times a week, weakly, monthly the value 0 for each of the five meat variables, and those who had answered less often or never the value 1 (indicating the vegetarians). These five variables were computed into an additive index. Those who score 5 on the index eat all five meat products less than monthly or never, scoring 4 eat four of the five meat products less than monthly (they eat 1 meat product monthly or more often). Scoring 5 indicates a consumption pattern that is easy to characterise as vegan or vegetarian. But scoring 4 could also be suggested to represent a degree of vegetarianism. If we do this calculation, there are 8 percent in the United Kingdom who are vegans or vegetarians, which corresponds with the results from Trust in Food (Kjærnes et al., 2005).

TABLE 26.1 Index of frequencies of *not* eating various meat items (chicken, bacon and/or ham, sausages, pork, beef)

Index	HU	IT	FR	UK	NL	NO	SE
0	30	51	61	41	51	52	63
1	34	25	23	24	26	26	21
2	19	14	11	17	11	13	8
3	12	6	4	9	7	6	3
4	4	3	1	5	2	3	2
5	1	1	1	3	3	1	3
	100	100	100	100	100	100	100
N	1,498	1,497	1,498	1,499	1,494	1,494	1,501

Notes: the higher the score on the index are, the higher the probability of being a vegetarian; don't know is excluded.

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### 26.3 EDIBILITY – THE COUNTRY CONTEXT HAD TO BE TAKEN INTO CONSIDERATION

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In question 3, we asked if some animals were found appealing or unappealing to eat, trying to grasp some cultural differences of edibility. The animals were venison, veal, horse, ostrich and rabbit. Four of the five animals are the same in all seven countries, but not the first one; venison. This animal should be an indicator of an animal commonly hunted in that country.

Venison is an overall category for wild game meat. In some of the countries we gave some ex-amples:

Hungary:	“Vadhús” (English: wild game meat)
Italy:	“Cervo, cinghiale” (English: fallow deer and boar)
France:	“Gibier” (English: game)
United Kingdom:	“Venison” (wild game meat, especially red deer)
Netherlands:	“Hertenvlees” (English: venison)
Norway:	“Hjort og elg” (English: red deer and moose)
Sweden:	“Vilt (älgkjött, rådjurskjött, etc) (English: moose and roe deer)

Table 4.2 presents the answers regarding how appealing the respondents in the various countries see venison. It is a possibility that different examples of game animals may influence the answers. However, the enormous differences between the countries indicate that it is the broad category that has been understood, and that some of the variations between the countries is due to different cultures, different hunting traditions and different food traditions of what is eligible.

TABLE 26.2 Q3.1 How appealing is VENISON? (If eat meat) (percentages)

	HU	IT	FR	UK	NL	NO	SE
Not at all appealing	29	46	40	48	56	6	9
2	10	13	22	13	12	5	8
3	16	15	18	16	13	12	20
4	17	12	9	10	12	26	22
Very appealing	28	14	10	13	8	52	40
Total	100	100	100	100	100	100	100
N (don't know excluded)	1,464	1,205	1,490	1,385	1,386	1,475	1,468
Don't know/Refused	1.7	19.3	0.3	6.0	6.2	1.3	0.9
N (total, if eat meat)	1,490	1,493	1,494	1,473	1,478	1,496	1,481

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## 26.4 LOADED CONNOTATIONS?

Sometimes connotations are loaded, either in a negative or a positive way. The negatively loaded alternatives will be systematically under-reported, while the positive ones will be over-reported. This kind of systematic measurement error is related to construct validity (Judd and Kenny, 1981). We will here bring up some issues that we encountered in the formulation of the questions and reviewing the distribution of answers.

*Eggs – Organic, Free-range, Hens in Cage*

The problem of systematic error could be the case when asking about eggs from free-ranged hens and eggs from hens kept in cages (battery, factory). Table 26.3 presents the distribution of answers, as well as the proportion who did not know or refused to answer.

These proportions of organic and free-range are, according to our results, very high. This does not correspond to the market shares of organic eggs and free range eggs for some of the countries. In Norway, for example, the market share for eggs from free-ranged hens is only 5 per cent (in the grocery market (Source: Prior – One of the biggest poultry industries in Norway)). The market share of organic eggs from the grocery stores in Norway is 2.3 per cent (Statens landbruksforvaltning, 2005). It looks as if the Norwegians answers are systematically over-reported answering the free-range options (organic plus free-range 50 per cent).

TABLE 26.3 Q8 Which eggs do you normally buy? (if buy eggs) (percentages)

	HU	IT	FR	UK	NL	NO	SE
Organic eggs	8	23	14	15	12	9	16
Free-range	65	47	60	71	82	41	65
SUM free-range	73	70	74	86	94	50	81
Battery (factory)	9	5	5	4	3	8	2
Any / No preference	17	25	21	10	3	42	17
Total	100	100	100	100	100	100	100
N (don't know excluded)	1,119	1,026	1,248	1,312	1,221	1,335	1,328
Don't know/ Refused	6.1	5.5	0.8	1.5	1.2	2.3	1.5
N (total, if buy eggs)	1,196	1,086	1,258	1,332	1,236	1,366	1,348

The European Commission carried out a survey, focusing on the attitudes of consumers towards the welfare and protection of farmed animals in the countries of EU

(*Eurobarometer*, 2005). The results are presented in Table 26.4. The interviews were conducted by face to face interviews. One of the questions was similar to ours. Two of the options were buying eggs from hens in free-ranged systems indoors and outdoors. We had the options of organic and free-range. Eurobarometer rotated their options, while we did not because organic had to be presented for the respondent before free-range. Organic eggs are produced in free-range systems, but it is not the opposite; free-ranged hens do not necessarily produce organic eggs. The sum of organic and free-range, are free-range. If we compare the rows in Tables 26.3 and 26.4 highlighted by italics, there are big differences between some of the countries, like Italy and France, where the results from our telephone survey are much higher than the answers on free-range in the *Eurobarometer*. Norway is not included in the *Eurobarometer* (Norway is not member of EU). However, it looks like the proportion of free-ranged is higher for all countries in the Welfare Quality survey (telephone interviews) compared to the Eurobarometer (face-to-face interviews).

TABLE 26.4 Percent proportion buying eggs in non-caged systems, indoors systems, free-range systems or outside.

	HU	IT	FR	UK	NL	SE
In non-caged systems indoors	7	12	5	5	33	8
In free-range systems or outside	53	28	44	69	45	71
SUM free-range	60	40	49	74	78	79
In battery cage production systems	4	14	32	8	6	8
In other caged production systems	2	16	7	3	6	4
SUM cage	6	30	39	11	12	12
I do not pay attention	34	30	12	15	10	9
N	606	803	913	1,168	916	926

Source: *Eurobarometer*, 2005.

There may be several explanations why these results do not seem to correspond between the two different surveys, and in Norway the survey do not corresponds at all well with the market shares of the different kinds of eggs. It is not sure that the market shares of eggs from free-ranged hens correspond very well with the *Eurobarometer* either.

First, some words may have a negative connotation while others have positive. In this particular question, most people have positive connotations to organic and free-range production, but have negative connotations to battery systems and cage systems. In all the translated questionnaires the terms ‘cage’, ‘battery’ or ‘factory’ were used, which give associations of bad treatment of the hens. Organic and free-ranged hens are probably believed to have a more happy life. The respondents want to do the right thing for a good cause, telling about their good intentions instead of what they actually do.

Hungary:	“Ketreces/belterkes tartásból scármazó (gyári) tojást, vagry”
Italy:	“Uova da lalline allevate in batteria”
France:	“OEufs pondus par des animaux élevés en batterie (usine)”
United Kingdom:	“Battery (factory)”
Netherlands:	“Legbatterij eieren”
Norway:	“Egg fra høner I bur”
Sweden:	“Ägg från fabric”

Second, this can be a question of knowledge, or lack of knowledge. The consumers may not aware of what kinds of eggs they are buying. The labelling does not give sufficient information. Perhaps many Norwegians think that all eggs of domestic origin are welfare friendly, or there are Italians who think that eggs from their particular region or supplier are produced organically or in free-range systems.

If this variable is used in further analyses, one should be very careful, and it would be an idea to get information about the market shares for different types of eggs in the different countries.

#### *Organic Meat – Also a Good Cause?*

There is also a possibility that consumption of organic meat is over-reported. The figures presented in Table 26.5 seem also to some extent overestimated for some countries. In Norway only 1.32 per cent of the total production are organic meat, calculated as number of kilos slaughtered animal by total slaughtered animals per half a year (Statens landbruksforvaltning, 2005). However, the correspondence is not as bad as for eggs. The response categories “sometimes” and “rarely” are not very precise terms of frequencies, and hence may express subjective guesses.

TABLE 26.5 Q10 How often do you buy organic meat? (If buy meat) (percentages).

	HU	IT	FR	UK	NL	NO	SE
Always	8	17	9	11	9	2	6
Sometimes	11	23	36	28	36	19	39
Rarely	17	20	25	22	24	38	28
Never	64	40	31	39	31	40	27
Total	100	100	100	100	100	100	100
N (don't know excluded)	1,150	1,115	1,307	1,303	1,226	1,309	1,285
Don't know/Refused	9.6	6.7	2.7	3.3	2.1	4.6	5.0
N (total, if buy meat)	1,276	1,195	1,343	1,350	1,252	1,375	1,353

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## 26.5 INCOME – A SENSITIVE QUESTION

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When considering the involvement of people in farm animal welfare in their capacity as consumers, economy forms and important background factor that should be considered. But income is a sensitive question to ask. It is difficult for some people to have sufficient overview of the income. It is also looked upon as a private matter and many respondents are reluctant to answer such questions. When asking about income, one must also consider whether one should ask for the total income or the net income, the household income or the respondent's income, income per year or per month, ask for the exact income (integer), or income presented as pre-coded intervals (brackets)? In our case, we have the extra problem with different countries, different currencies, and different taxation systems.

We decided to ask for monthly income because this would be easier for the respondent to have an idea about. We also decided to ask for monthly income after taxes, because the level and distribution of taxation differ considerably between the countries and the net income gives a better view of the living conditions. We primarily wanted the respondent to tell their exact income (integer); but as a second option, if this was not possible, we ranged the income in brackets.

The questions asked were:

- D6 What is your household's income of benefits AFTER taxes?  
 D7 If refused/Don't know income in D6: If I read a list of net monthly income brackets; perhaps you can just say which bracket best fits your household income after taxes.

The income brackets are not exactly the same in all countries, because the brackets are supposed to have round figures, which is impossible because of different currencies. However, they do not differ much. The currency conversion rates used (7 September 2005) are: £1= 13.7 Swedish Crones (SEK), 11.5 Norwegian Crones (NOK), 359 Forints (HUF), 1.47 Euros (EU). Euro is used as the master brackets.

Table 26.6 shows significant differences between the countries. In Hungary, the brackets did not function very well because most of them fell in the lowest income category. In Norway, the highest income categories did not function either, because more than 60 per cent were categorized in the three highest alternatives. This was one of the reasons why exact income was preferable. Still, in a comparative setting, these biases do reflect real differences between countries and must be recognised as such in our analyses.

Most of the respondents answered the exact income – D6 – especially in Norway and Sweden, and to a certain degree Hungary, France, The United Kingdom and the Netherlands. However, one country is distinct from the others; Italy. Only 38 per cent answered the two income questions. As we have understood, Italians are not happy to

talk about their income. It is an issue not to be mentioned. We will therefore probably have to omit Italy from many of the analyses including income.

So-called “outliers” have been removed from Table 26.6 because they affect the average income too much. Incomes less than €100 per month have been removed in all countries except Hungary. There were also some extreme results in the upper categories, especially in the UK, where monthly net incomes were highly disproportionate compared to income statistics. There were also some “outliers” in other countries. In Table 26.6 these extremes are omitted. Each country has to check their income distribution when using the data, and decide on what are their “outliers”.

TABLE 26.6 Income distribution, and do not know/ refusals (percentages).

Total income D6+D7	HU	IT	FR	UK	NL	NO	SE
Less than 800 EU	75	7	5	11	4	2	3
800–1200 EU	17	24	15	11	13	2	6
1201–1800 EU	6	20	20	14	21	7	14
1801–2300 EU	1	16	16	12	16	9	18
2301–3000 EU		14	21	17	21	13	20
3001–3800 EU	7	8	10	10	14	24	–
3801–5300 EU	8	10	12	10	37	10	–
5301+ EU	3	4	14	5	15	4	–
	100	100	100	100	100	100	100
N	1175	564	1354	953	1145	1360	1387
<i>Percent answering:</i>							
D6 – the exact income	61	26	63	43	57	85	80
D7 Income in brackets	17	12	28	20	19	6	12
Total answering the income questions	78	38	90	63	76	91	92
Don't know/ refused/outliers	22	62	10	37	24	9	8
	100	100	100	100	100	100	100
N	1501	1500	1499	1499	1499	1501	1500

## 26.6 WHEN THE RESPONDENTS DON'T KNOW WHAT TO ANSWER

The option “Don't know” was included in most of the questions in the questionnaire, but the in-terviewers were instructed not to read them out (DO NOT READ OUT – Appendix 4). When, in spite of this, some informants end up in the “Don't know” category, we have in fact two questions (variables) in one, one where the answer is

missing and one where the respondents explicitly have said that they do not know or are uncertain about the answer to the question posed.

When the respondents actually do not know what to answer in a survey, this category can be treated in four ways.

One way to do it, and most common, is to exclude the respondents answering 'don't know' from the analyses, analysing only those who have an opinion on the subject we have asked for.

The second way is to include "Don't know" as an extra value. This is not a very good idea since the question then should be treated as two variables, as the size of this value will influence the distribution of the other values. This is especially not a good idea if the proportions of "Don't know" vary between the comparing categories.

A third way is to recode the "Don't know" category into a mid category on a scale with uneven numbers, for example a five point scale, where the mid category is "both/and" or "neither/nor". All these are reflecting an uncertainty. This could be relevant when using multivariate analyses, if we want to avoid losing too many respondents. This is only recommended if the mid category on the scale and the "Don't know" category do not vary systematically according to some key variables, like gender, age, education etc.

A fourth way is to analyse the question as two variables, one with the genuine options, and the other analysing the "Don't know" as an extra variable. This could be the case if the "Don't know" value is of some size. In some cases, a high proportion of "Don't know" may have a substantial interpretation of its own. This is especially the case regarding some of the questions on farm animal welfare, which is an issue we cannot expect all respondents to know too much about – and also regarding sensitive questions like income. In our survey, there are some questions with high proportions "Don't know" responses.

In question 3 – the question about how appealing various kinds of meat are (see Appendix) – there were high proportions of "Don't know" in some countries. In Hungary, 20 per cent answered "Don't know" to ostrich, in Italy 19 per cent answered "Don't know" to whether venison was appealing, 14 per cent horse, and 49 per cent ostrich. In Norway, 11 per cent answered "Don't know" for ostrich. We think that one plausible interpretation of these high figures might be that the respondents are not familiar with the type of meat and in that case it is easier to answer "Don't know".

Another question that held high proportions of "Don't knows", was question 15: In your opinion, how well do you think the welfare conditions are for the following farm animals in your country, on a scale from 1 to 5, where 1 is very poor and 5 is very important? The question was asked for three animals; PIGS, CHICKENS and DAIRY COWS. 12 per cent of the Hungarian respondents answered "Don't know" to how the welfare was for pigs, 10 per cent for chicken, and 15 per cent for dairy cows. In Italy 20 per cent answered "Don't know" for pigs, 16 per cent "Don't know" for chicken, and 16 per cent for dairy cows. These replies are honest answers to be interpreted as such as it may be difficult for ordinary people to assess farm animal welfare in a country.

When there are high proportions of “Don’t know”, this has to be taken into account in the analyses. This could be an answer of substance, and hence is interpretable. When the proportion “Don’t know” is low, it is better to recode them as missing and leave them out of the analyses. This must be evaluated in each case.

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# APPENDICES

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## 1 EXPLANATION OF QUALITY ASSURANCE SCHEMES NAMES

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### *British schemes*

ABP:	Assured British Pigs
FF:	Freedom Food
GQ:	Genesis Quality Assurance
SA:	Soil Association

### *Dutch schemes*

GFW:	Good Farming Welfare
IKB:	Integrated Chain Control (Integraal Keten Beheer)
MK:	Environment Brand (Milieukeur)
Scharrel:	Free-range

### *French schemes*

AB:	Organic Agriculture (L'Agriculture Biologique)
CCP:	Certificate of Product conformity
LRB:	Red Label Housing (Label Rouge Bâtiment)
LRF:	Red Label Farm (Label Rouge Fermier)

### *Italian schemes*

COOP

### *Norwegian schemes*

KSL:	Quality System for Agriculture
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### *Swedish schemes*

MHS:	Swedish farmers environmental house inspection (Sveriges Bänders Miljöhusensyn)
BAS:	Swedish Meats
KLS	Livsmedel ekonomiska förening

BIS	Swedish Meats
SLP	Slakteriprodukter
SvDhv:	Swedish animal health care (Svenska Djurhälsovården)
KRAV	organic certification label

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## 2 BASIC QUESTIONNAIRE FOR PIG FARMERS

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### *General*

- Farm size (ha, number of animals)
- Farm type (fattening pigs, sows, mixed, etc)
- Farmer (age, education, family situation, legal status of the company, gender)
- The marketing strategy
- A short overview of the relevant history of the farm

### *The definition of animal welfare*

- In what way is animal welfare an important 'issue'?
- What does animal welfare mean to the farmer?
- A reflection on the animal welfare situation on the farm. What could still be improved? How does the farmer assess the welfare of his animals?
- Who does the farmer trust most for the assessment of animal welfare (the VET, him/herself, scientists, consumers etc)?
- How does the farmer assess his/her own knowledge on animal welfare? Is his/her knowledge sufficient?
- Who (in society) is responsible for animal welfare? (Who should be responsible?)

### *Regulation*

- Farmer's knowledge on the animal welfare regulation.
- The most important barriers in relation to animal welfare in the present regulation.
- The most important barriers in relation to animal welfare in future regulation (if relevant).
- The farmer's opinion on the animal welfare legislation and these barriers (incl. possible improvements, the degree of realism)
- The farmer's opinion on the importance of EU-regulation on animal welfare, and the desirability of a 'level playing field'.
- To what extent does the farmer operate (concerning animal welfare) beyond the minimum requirements? Specify.

*Animal welfare schemes*

- Does the farmer participate in animal welfare schemes, and if yes, in which one(s)?
- Does the farmer consider to participate in a certain AWS? If yes, which one(s)?
- The farmers' opinion on participation in animal welfare schemes in general, a.o. with respect to:
  - the freedom to manage the farm in the farmer's own chosen way
  - an extra (administrative) workload
  - the way the scheme is organised
  - improved marketing opportunities
- What does the farmer know about the different AWS's and where did (s)he obtain his information?
- How 'tough' is the animal welfare module within the different AWS's?
- Is it possible for farmers to stay out of any of such schemes nowadays?

*If relevant:*

- The AWS in which the farmer participates
  - The original motivation to participate
  - (if different) The present motivation to participate
  - Strengths and weaknesses of the scheme (especially with respect to animal welfare)
  - Which are the most demanding requirements of the scheme?
  - Possible improvements (with respect to animal welfare)
  - The farmer's idea of the future – will the scheme continue to exist in its present form; if not: why, and what will change; will the farmer continue to participate etc.
- The consideration to participate in an AWS
  - Why would the farmer want to participate?
  - Why not (yet)?
- No participation in an AWS
  - The motivation not to participate
  - What could/would change this motivation?
  - To what extent do the different AWS's interest the farmer? (Why (not)?)
  - If not yet addressed to: to what extent does the farmer consider the requirements on animal welfare to be an obstruction to participate in the different AWS's

*Specific additional animal welfare requirements*

- Possible measures to be discussed:
  - the use of straw as bedding material
  - the implementation of an outdoor free range area
  - a ban on the castration of boars
  - the implementation of a stable-group system (all in – all out)
  - comfort-improving measures like a brush
  - the non-use of hormones and genetic modification (as far as legal)

- no routine cutting of teeth and/or tails
- a (partly) closed floor
- Are these measures a) feasible, and b) desirable?
- Is the farmer willing to implement these measures? Under what conditions?

#### *Monitoring and control system*

- In what way are the specific (animal welfare) requirements of the AWS controlled and monitored?
- How often is the farmer inspected? Is the inspection very tough / serious in his opinion?
- What are the strengths and weaknesses of this monitoring/control system?
- Possible improvements.

### 3 TENDER SPECIFICATION: POPULATION SURVEY 'WELFARE QUALITY'

#### *1 Introduction*

Cardiff University, in collaboration with research partners in six other European countries in the project WELFARE QUALITY, intends to run a population survey regarding attitudes to farm animal welfare in seven European countries. The project <[www.welfarequality.net](http://www.welfarequality.net)> is funded by the European Commission under the 6th Framework Programme for research and development (contract no. FOOD-CT-2004-506508). The overall project is coordinated by the Animal Sciences Group of Wageningen University and Research Centre, Lelystad, the Netherlands. The survey task is coordinated by Cardiff University, UK, and the National Institute for Consumer Research (SIFO) in Oslo, Norway.

The plan is to contract one poll institute who will then coordinate the practical implementation of the survey, through its respective affiliates in participating countries.

The tender process is organised by an ad hoc committee set up by the Project Management Committee. The ad hoc committee includes the project coordinator, Harry Blokhuis, and the task coordinators, Mara Miele from Cardiff University and Unni Kjaernes from the National Institute for Consumer Research. Their decision on granting a tender will be made by 1 July.

Regarding the criteria for selecting the best offer, it is emphasised that all requirements in this Specification should be met, specifically:

- demonstrate appropriate previous experience with CATI surveys;
- demonstrate appropriate previous experience with cross-country population surveys (examples required);

- demonstrate appropriate previous experience with contracts made for social scientific research projects (references, contact persons required);
- demonstrate established collaboration, including management and communication procedures with affiliate polling institutes in the selected countries (examples required);
- demonstrate a track record of very high quality and good management in this type of study;
- comply with all the procedural requirements in this Specification;
- all other criteria being satisfactory, price will be decisive.

## *2 Target Population*

Survey target populations should be national populations aged 18–80 years old in the United Kingdom, France, Hungary, Italy, Norway, Sweden and the Netherlands.

## *3 Method*

The investigation must be conducted as an ad hoc CATI (computer-assisted telephone) interview, according to an exact and similar instruction in all participating countries, in order to ensure nation-wide comparability of results.

Your procedures for contacts with respondents, including the routine number of recalls, must be explained in your tender.

Pilot interviews testing out questions and the length of the interview must be carried out in all seven countries. The results from the pilots must be discussed with the task coordinators.

## *4 Questionnaire/Interview Duration*

The questionnaire and interviewer instruction manuals (instructions to interviewers about the general aim of the investigation and specification of concepts) are developed by SIFO in English. The English version needs to be translated into the various countries' local languages by the poll institute in each country, in close contact with the local WELFARE QUALITY partner, to ensure consistency with the data map. Translation also includes standardised back-ground information (demographics). Standardisation will be done by the WELFARE QUALITY group, and is submitted by SIFO to the poll institute for distribution to the various participating countries.

The poll institute will, based on the questionnaire, define the data map to be applied in each participating country.

Total interview duration should not exceed 20 minutes in order to avoid respondent fatigue. No open questions are included.

### *5 Sample Definition*

Samples are to be representative for the populations in question, covering the age group 18–80 years old. Costs are required with four different sample sizes:

- 1,000 respondents in each country
- 1,500 respondents in each country
- 2,000 respondents in each country
- 2,500 respondents in each country

### *6 Reporting*

Project reporting must be provided to the National Institute for Consumer Research in Norway in the form of one data file in SPSS format, including all information from the respective participating countries. National files in participating countries must be sent to the coordinating polling institute for final merging. The file must include national identifiers, weights and a brief description of the weighting procedure adopted. A short description of various types of non-response must also be included.

Simple distribution tables for the various variables must also be provided for each national data set.

### *7 Time Frame*

The investigation will be conducted in week 39 (26 September – 2 October 2005). It must be carried out simultaneously in all participating countries. Appropriate interviewer capacity must be available in participating countries, and reservations must be made in due time prior to fieldwork.

Pilot interviews are then to be undertaken in week 36 (5–11 September).

The task coordinator must receive the project reporting by week 41 (Thursday, 13 October).

### *8 Costs*

The calculation of costs must include the total amount as well as specified costs for each participating country.

Survey costs related to each participating country will be charged via the coordinating poll institute.

*9 Participating Agencies*

Your tender must include exact information about your affiliates in each country and your connection to them, preferably also information about previous collaborations.

Your tender must also explain communication with your partners and routines that can ensure close coordination throughout the planning and data collection period.

*10 Miscellaneous*

Before starting the work an organisational model must be established to define precisely the timing, decision – and execution-making responsibilities. This must be done in close collaboration with the project contact, the National Institute for Consumer Research in Norway.

\*\*\*\*\*

Cardiff, May 2005,

Mara Miele  
Cardiff University  
Unni Kjaernes  
SIFO

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## 4 FINAL QUESTIONNAIRE FOR POPULATION SURVEY

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COLOUR CODING: **RED = FOR TRANSLATION**  
**BLUE = TO BE ADAPTED BY EACH COUNTRY**  
**HIGHLIGHTED YELLOW = CHANGE (SINCE PILOT)**

INTERVIEWER INSTRUCTIONS – PUT INTO NATIVE LANGUAGE  
CATI INSTRUCTIONS – PROGRAMME, NO NEED TO TRANSLATE  
INTERVIEWER NOTES – ADD TO BRIEFING DOCUMENTS AS REQUIRED

### ANIMAL WELFARE – MAIN INTERVIEWS

#### S1

CATI records **REGION** (from sample) and continues if still in quota

#### **INTRO**

**Good afternoon/evening. I'm ..... calling from TNS, we're the largest market research company in the UK. We are conducting a survey about the food people eat and the way it's produced. We'd like to interview someone in your household about it. Can I just ask you a couple of questions about your household to determine who we should speak to?**

**IF NECESSARY: ADD ...**

**We're not selling anything. It's a genuine study, which is being conducted across Europe on behalf of a group of universities and academics in Europe (Cardiff University), so that opinions about food and food production can be compared across different countries. Household telephone numbers have been selected at random so that we interview a representative sample – this is why we'd like to speak to someone from your household.**

Continue about your standard MRS code of conduct/quality assurances ...

#### **SCREENING**

#### S2

Check you are speaking to someone between 18 and 80 or ask for someone else. If no-one in household between 18 and 80, CLOSE

#### S3

Ask HOUSEHOLD SIZE

**How many people are there in total in your household, including yourself?**

WRITE IN	
----------	--

RANGE = 1-20

#### S4

**And how many of these, including yourself are between 18 and 80?**

WRITE IN	
----------	--

RANGE = 1-20, CANNOT BE MORE THAN NUMBER AT S3

FOLLOW BIRTHDAY RULE PROCEDURES TO CHOOSE SCREENING RESPONDENT OR ANOTHER PERSON 18–80 – TAKE THEIR NAME AND CONTINUE OR CALL BACK FOR THAT CHOSEN PERSON

NOW YOU ARE SPEAKING TO THE SELECTED RESPONDENT AND CAN CONTINUE INTERVIEW ...

**Can you spare about 15-20 minutes to answer some questions about your household?**

IF THIS IS A CALLBACK ASK FOR NAMED (SELECTED PERSON) AND USE INTRO 2:

INTRO

**Good afternoon/evening. I'm ... calling back from TNS (the largest market research company in the UK). We are conducting a survey about the food people eat and the way it's produced and when we spoke to someone in your household, our computer randomly selected you as being the person in the household we need to speak to.** (ADAPT SCRIPT ACCORDING TO BIRTHDAY RULE/RANDOM PROBABILITY SELECTION) MENTION PREVIOUS PERSON YOU SPOKE TO OR DAY OF CALL AS PER CALLBACK INTERVIEWER NOTES WHERE REQUIRED, TO EXPLAIN WHY YOU ARE CALLING BACK OR WHY THEY HAVE BEEN CHOSEN) **If it's OK, we'd like you to answer some questions about the food you eat and how it's produced, which will take around 15–20 mins.**

IF NECESSARY: ADD...

**We're not selling anything. It's a genuine study which is being conducted across Europe on behalf of a group of universities and academics in Europe (Cardiff University), so that opinions about food and food production can be compared across different countries. Household telephone numbers have been selected at random so that we interview a representative sample – this is why we'd like to speak to someone from your household.**

**Continue about MRS code of conduct/quality assurances ...**

**S5**

Record GENDER

Male	
Female	

**S6**

Ask EXACT AGE

**And can you tell me your age please?**

WRITE IN	
----------	--

RANGE = 18-80, if under 18 or over 80, ask for another respondent or CLOSE

MAIN QUESTIONNAIRE
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**I'd like to start by asking some questions about your eating habits.**

**ALL RESPONDENTS****Q1**

**For each one of the food types I am about to read out, I would like to know whether you tend to eat them daily, several times a week, weekly, monthly, less often or never.**

Advice to interviewer:

Frequency – If respondent answers twice a month, record this as monthly. If respondent answers twice a week, record this as weekly.

Food type – Eggs: this does not mean eggs as an ingredient in something such as an ingredient in a cake. It means as an omelette, boiled egg etc. Milk: means drinking milk, milk in drinks such as tea or coffee or milk on cereal but not as an ingredient in something. Sausages: any kind of sausages

ONE ANSWER FOR EACH FOOD TYPE

DO NOT ROTATE

	<u>READ OUT</u>	Daily	Several times a week	Weekly	Monthly	Less often	Never	(Don't know/Ref) <u>DO NOT READ OUT</u>
		1	2	3	4	5	6	9
1.1	Chicken							
1.2	Eggs (not as an ingredient)							
1.3	Bacon and/ or Ham							
1.4	Sausages (any kind)							
1.5	Pork							
1.6	Beef							
1.7	Milk (not as an ingredient)							

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q1:**

IF DAILY, SEVERAL TIMES A WEEK, WEEKLY OR MONTHLY TO ANY MEAT OPTION (CHICKEN, BACON AND/OR HAM, SAUSAGES, PORK, BEEF) AT Q1 GO TO Q3.

IF LESS OFTEN OR NEVER TO ALL MEAT OPTIONS (CHICKEN, BACON AND/OR HAM, SAUSAGES, PORK, BEEF) AT Q1 CONTINUE TO Q2.

**FILTERED (IF DON'T EAT MEAT)**

**Q2**

**Do you consider yourself to be ...**

ONE ANSWER

	<u>READ OUT</u>	<u>EXPLAIN</u>
1	<b>Vegan</b>	<b>That is, you do not eat eggs or dairy products or any foods of animal origin</b>
2	<b>Total vegetarian</b>	<b>You eat dairy products but no fish or meat at all</b>
3	<b>Partial vegetarian</b>	<b>You do not eat meat regularly but you can eat fish or you eat meat very occasionally</b>
4	<b>(None of these)</b> <u>DO NOT READ OUT</u>	<b>IF CODED - INTERVIEWER MUST READ:</b> <b>You eat meat then, but very rarely, or you only eat meat other than chicken, bacon and ham, sausages, pork or beef.</b> <u>INTERVIEWER TO BACKCODE AT Q1 OR ABOVE IF NECESSARY ('REDO') OR IF OK, LEAVE CODED ('CORRECT')</u>
9	<b>(Don't know/Ref)</b> <u>DO NOT READ OUT</u>	

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q2:**

IF VEGAN OR TOTAL VEGETARIAN AT Q2 GO TO Q4.

IF PARTIAL VEGETARIAN, NONE OF THESE OR DON'T KNOW AT Q2 CONTINUE TO Q3.

**FILTERED (IF EAT MEAT)**

**Q3**

**How appealing are each of the following meats on a scale of 1 to 5, where 1 is not at all appealing and 5 is very appealing? You may use any number from 1 to 5.**

ONE ANSWER FOR EACH FOOD TYPE

OPTIONS TO BE ROTATED

	<u>READ OUT</u>	<b>Not at all appealing</b>	→				<b>Very appealing</b>	<b>(Don't know/Ref)</b> <u>DO NOT READ OUT</u>
		1	2	3	4	5	9	
3.1	<b>Venison</b>							
3.2	<b>Veal</b>							
3.3	<b>Horse</b>							
3.4	<b>Ostrich</b>							
3.5	<b>Rabbit</b>							

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q3:**

IF SINGLE HOUSEHOLD AT SCREENING QUESTION GO TO Q5

IF MORE THAN 1 PERSON IN HOUSEHOLD AT SCREENING QUESTION S3 CONTINUE TO Q4

**FILTERED (IF NOT SINGLE HOUSEHOLD)****Q4****How much of your household's food shopping do you do?**

ONE ANSWER

READ OUT

1	All / Almost all	
2	More than half	
3	About half	
4	Less than half	
5	Almost nothing / none	
9	(Don't know/Ref) <u>DO NOT READ OUT</u>	

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q4:**

IF ALMOST NOTHING/NONE AT Q4 GO TO Q6

IF ALL/ALMOST ALL, MORE THAN HALF, ABOUT HALF OR LESS THAN HALF AT Q4 CONTINUE TO Q5

**FILTERED (IF DO SOME FOOD SHOPPING)****Q5****I will now list different types of shops and I would like to know where you usually buy certain food products?**READ THE TYPES OF SHOP AND THEN ASK WHICH TYPE OF SHOP FOR EACH FOOD TYPE. ALLOCATE ONE ANSWER FOR EACH FOOD TYPE TO ONE OF THE RETAIL FORMATS.**The types of shop are:****Large superstore / Supermarket** DO NOT READ OUT (e.g. Asda, Sainsbury's, Tesco, Waitrose)**Small supermarket / Convenience store** DO NOT READ OUT (e.g. Spar, Londis, Tesco Metro, Sainsbury's Local, 7-11, corner shops etc)**Discount store** DO NOT READ OUT (e.g. Aldi, Lidl, Kwiksave, cash and carry stores etc)**Butcher****Other (includes mobile shop, door-to-door/home delivery, farm shop, organic shops, food markets and own production e.g. they have their own chickens)****Or you do not buy the product****(Don't know/Ref)** DO NOT READ OUTAdvice to Interviewer:*Large Superstores/Supermarkets include hypermarkets and large to medium-sized super-markets selling a variety of goods, mainly food. They are typically located in, or on the edge, of town. Use your own examples to help interviewers (do not read out brands)**Small supermarket / Convenience stores are medium to small-sized general or grocery stores, selling mainly food. They are often chains or can be independents. An example of a small supermarket is Tesco Metro and convenience store is Spar or the traditional corner shop. Use your own examples to help interviewers (do not read out brands)**Discount stores are supermarkets with a low price profile e.g. Aldi, Lidl or 'cash and carry' stores.**Others encompass every other format where food can be bought, including farms and mar-kets and own production. When referring to delivery, this does not mean delivery by a su-permarket.*

Don't buy - this **does not include if they produce their own – own production is included in Other, it must not be recorded as do not buy the product**

**Where do you usually buy?**

ONE ANSWER FOR EACH FOOD TYPE

	<u>READ OUT</u>	Large superstore/ supermarket	Small supermarket/ convenience store	Discount store	Butcher	Other	Don't buy	Don't know/ Ref
		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>9</b>
5.1	<b>Chicken</b>							
5.2	<b>Eggs</b>							
5.3	<b>Bacon and/or Ham</b>							
5.4	<b>Beef</b>							

**ALL RESPONDENTS**

**Q6**

**Thinking of farm animal welfare in general, how important is this issue for you on a scale of 1 to 5, where 1 is not at all important and 5 is very important?**

Not at all important	→				Very important	(Don't know/Ref) <u>DO NOT READ OUT</u>
1	2	3	4	5	<b>9</b>	

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q6:**

IF ALMOST NOTHING/NONE AT Q4 GO TO **Q12**

IF ALL/ALMOST ALL, MORE THAN HALF, ABOUT HALF OR LESS THAN HALF AT Q4 AND BUY ANY OF THE MEAT PRODUCTS (Chicken, Bacon and/or Ham, Beef) AT Q5 CONTINUE TO Q7

**FILTERED (IF BUY ANY MEAT)**

**Q7**

**When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come, on a scale of 1 to 5 where 1 is never and 5 is always?**

Never	→				Always	(Don't know/Ref) <u>DO NOT READ OUT</u>
1	2	3	4	5	<b>9</b>	

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q7:**

IF DOES NOT BUY EGGS AT Q5 GO TO **Q10**

IF BUYS EGGS AT Q5 CONTINUE TO Q8

**FILTERED (IF BUY EGGS)****Q8****When you buy eggs, which of these do you normally buy?***Note to Interviewer: If respondent does not actually buy eggs but has their own source e.g. they own chickens, they should still detail the type of eggs they produce.*

ONE ANSWER, DO NOT ROTATE

READ OUT

1	<b>Organic eggs</b>	
2	<b>Free-range</b>	
3	<b>Battery (factory)</b>	
4	<b>Any / No preference</b>	
9	<b>(Don't know/Ref)</b> <i>DO NOT READ OUT</i>	

**FILTERED (IF BUY EGGS)****Q9****Continuing with eggs, are the following factors very important, fairly important or not important to you?**

ONE ANSWER FOR EACH OPTION

OPTIONS TO BE ROTATED

	<u>READ OUT</u>	<b>Very important</b>	<b>Fairly important</b>	<b>Not important</b>	<b>(Don't know/Ref)</b> <i>DO NOT READ OUT</i>
		1	2	3	9
9.1	<b>Freshness</b>				
9.2	<b>Low price</b>				
9.3	<b>Organic</b>				
9.4	<b>Treatment of the hens</b>				
9.5	<b>Hens are not treated with antibiotics or hormones</b>				

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q9 AND THOSE FROM Q6 or Q7 (i.e. all respondents):**

IF DOES NOT BUY MEAT AT Q5 GO TO Q12

IF BUY ANY OF THE MEAT PRODUCTS (Chicken, Bacon and/or Ham, Beef) AT Q5 CONTINUE TO Q10

**FILTER (IF BUY MEAT)****Q10****When you buy meat, how often, in general, do you buy organic?**

ONE ANSWER

READ OUT

1	<b>Always</b>	
2	<b>Sometimes</b>	
3	<b>Rarely</b>	
4	<b>Never</b>	
9	<b>(Don't know/Ref)</b> <i>DO NOT READ OUT</i>	

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q10 AND THOSE FROM Q8 (i.e. all respondents):**

IF DOES NOT BUY BEEF AT Q5 GO TO Q12

IF DOES BUY BEEF AT Q5 CONTINUE TO Q11

**FILTERED (IF BUY BEEF)**

**Q11**

**Now thinking specifically about beef ... are the following factors very important, fairly important or not important to you?**

ONE ANSWER FOR EACH OPTION  
 OPTIONS TO BE ROTATED

	<u>READ OUT</u>	Very important	Fairly important	Not important	(Don't know/Ref) <u>DO NOT READ OUT</u>
		1	2	3	9
11.1	Treatment of the animal				
11.2	Slaughtering methods				
11.3	Low price				
11.4	Raised outdoors for part of the year				
11.5	Animal is not treated with antibiotics or hormones				

ALL RESPONDENTS

**Now about information and labelling...**

**Q12.**

**Thinking generally again about food from farm animals (such as meat, eggs and dairy), is it very, fairly or not important to include the following information on the label?**

ONE ANSWER FOR EACH OPTION  
 OPTIONS TO BE ROTATED

	<u>READ OUT</u>	Very important	Fairly important	Not important	(Don't know/Ref) <u>DO NOT READ OUT</u>
		1	2	3	9
12.1	A simple welfare assurance mark				
12.2	A welfare grading system like a different number of stars				
12.3	Information about where the animals are kept				
12.4	Information about what the animals eat				
12.5	Country of origin				
12.6	What farm they come from				

**ALL RESPONDENTS****Q13**

Thinking about information on farm animal welfare, would you use the following sources of information if available?

ONE ANSWER FOR EACH OPTION

OPTIONS TO BE ROTATED

	<i>READ OUT</i>	Yes	No	(Don't know/Ref) <i>DO NOT READ OUT</i>
		1	2	9
13.1	Product labelling			
13.2	In-store information			
13.3	Internet/web-site information about the product			
13.4	Information from newspapers, TV or other media			

**ALL RESPONDENTS****Q14**

To what extent do you agree or disagree with the following statements on a scale of 1 to 5 where 1 is strongly disagree and 5 is strongly agree? As before, you may choose any number from 1 to 5.

ONE ANSWER FOR EACH OPTION

OPTIONS TO BE ROTATED

	<i>READ OUT</i>	Strongly disagree $\longrightarrow$ Strongly agree					Don't know/Ref <i>(DO NOT READ OUT)</i>
		1	2	3	4	5	9
14.1	I care about animal welfare, but it's too time consuming to look for welfare friendly products						
14.2	I find it unappealing to handle raw meat						
14.3	It's wrong to eat food from animals that have not had a good life						
14.4	I feel sufficiently informed about farm animal welfare						
14.5	To improve farm animal welfare, we must be willing to pay a higher price for food						
14.6	My religion affects the kinds of foods I eat						
14.7	When eating, I don't like to think of meat as coming from live animals						
14.8	I care about animal welfare but cannot find welfare friendly products where I shop for food						

**ALL RESPONDENTS**

**Q15**

In your opinion, how well do you think the welfare conditions are for the following farm animals in {COUNTRY}, on a scale of 1 to 5, where 1 is very poor and 5 is very good?

ONE ANSWER FOR EACH OPTION

<i>READ OUT</i>		Very poor $\longrightarrow$ Very good					Don't know/Ref <i>(DO NOT READ OUT)</i>
		1	2	3	4	5	9
<b>15.1</b>	<b>Pigs</b>						
<b>15.2</b>	<b>Chickens</b>						
<b>15.3</b>	<b>Dairy cows</b>						

**ALL RESPONDENTS**

**Q16**

And what about the methods used to transport animals in {COUNTRY}, using the same 1 to 5 scale, where 1 is very poor and 5 is very good?

ONE ANSWER

Very poor $\longrightarrow$ Very good					Don't know/ref <i>(DO NOT READ OUT)</i>
1	2	3	4	5	9

**ALL RESPONDENTS**

**Q17**

And, in your opinion, how well do you think the animals are treated at the slaughterers in {COUNTRY} on a scale of 1 to 5, where 1 is very poor and 5 is very well?

ONE ANSWER

Very poor $\longrightarrow$ Very well					Don't know/ref <i>(DO NOT READ OUT)</i>
1	2	3	4	5	9

**ALL RESPONDENTS**

**Q18**

In general, over the past 10 years, do you think that farm animal welfare in {COUNTRY} has improved, is about the same or has got worse?

ONE ANSWER

PROBE FOR LITTLE/A LOT

*READ OUT*

<b>1</b>	<b>Improved</b>	
<b>2</b>	<b>About the same</b>	
<b>3</b>	<b>Got worse</b>	
<b>9</b>	<b>(Don't know/ref)</b> <i>DO NOT READ OUT</i>	

**ALL RESPONDENTS**

**Q19**

To what extent do you agree or disagree with the following statements, please use a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree?

ONE ANSWER FOR EACH OPTION

OPTIONS TO BE ROTATED

<u>READ OUT</u>		Strongly disagree $\longrightarrow$ Strongly agree					Don't know/Ref <i>(DO NOT READ OUT)</i>
		1	2	3	4	5	9
	To what extent do you agree or disagree that						
19.1	good animal welfare will improve the taste of the meat						
19.2	good animal welfare will increase the volume of milk cows produce						
19.3	good animal welfare will benefit the reputation of our country						
19.4	good animal welfare will improve human health						
19.5	good animal welfare will cost more and put farmers out of business						

**ALL RESPONDENTS**

**Q20**

And to what extent do you agree or disagree with the following statements? Again, on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

ONE ANSWER FOR EACH OPTION

OPTIONS TO BE ROTATED

*Note to Interviewer 21.2: We are not providing definitions here – it is the respondent's own definitions/perceptions of organic and factory farms that are important*

<u>READ OUT</u>		Strongly disagree $\longrightarrow$ Strongly agree					Don't know/ref <i>(DO NOT READ OUT)</i>
		1	2	3	4	5	9
20.1	Small-scale farming guarantees good animal welfare practices						
20.2	There is no difference between organic farms and factory farms when it comes to animal welfare						
20.3	It is acceptable to kill farm animals for food						
20.4	It is acceptable to hunt game animals for food						
20.5	Farm animals can feel pain like a human being						

**ALL RESPONDENTS**

**Q21**

Imagine a scandal concerning the welfare of chickens in {COUNTRY}. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give misleading information?

ONE OF THE FOLLOWING ANSWERS FOR EACH OPTION  
ROTATE ITEMS

	<i>READ OUT</i> <i>[READ OUT EACH ITEM].</i> <b>Would they tell.....?</b>	The whole truth	Only tell part of the truth	Give misleading information	Don't know/Ref <i>(DO NOT READ OUT)</i>
		<b>1</b>	<b>2</b>	<b>3</b>	<b>9</b>
<b>21.01</b>	<b>Press, television and radio</b>				
<b>21.02</b>	<b>The food processing industry</b>				
<b>21.03</b>	<b>Food retailers</b>				
<b>21.04</b>	<b>Farmers or farmers groups</b>				
<b>21.05</b>	<b>Consumer organisations/watchdogs</b>				
<b>21.06</b>	<b>Animal protectionists</b>				
<b>21.07</b>	<b>Politicians</b>				
<b>21.08</b>	<b>Public food authorities (like the Food Standards Agency)</b>				
<b>21.09</b>	<b>Independent food experts (e.g. academics)</b>				
<b>21.10</b>	<b>The EU</b>				

*Advice to Interviewer:*

Farmers includes farmer groups and unions, Consumer organisations can be national or re-gional groups

**ALL RESPONDENTS**

**Q22**

How much do you think that your voice as a consumer counts, on a scale of 1 to 5, where 1 is very little and 5 is a great deal?

ONE ANSWER

Very little $\longrightarrow$ A great deal					(Don't know/ref) <i>(DO NOT READ OUT)</i>
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>9</b>

**ALL RESPONDENTS****Q23**

Have you done any of the following during the last twelve months?

ONE ANSWER FOR EACH OPTION

DO NOT ROTATE

	<i>READ OUT</i>	Yes	No	Don't know/ref <i>(DO NOT READ OUT)</i>
		1	2	9
23.1	Complained to a retailer (supermarket) about the food they sell			
23.2	Boycotted any food types or brands in protest about food issues			
23.3	Bought particular foods or brands in order to encourage or support their sale, like fair trade			
23.4	Protested about food issues either in person, by phone, by letter or email			
23.5	Been a member of a pressure group or organisation which works to improve food			

**ALL RESPONDENTS****Q24**

Have you ever visited a farm and seen animals being reared?

ONE ANSWER – PROBE IF YES

*READ OUT*

1	Yes, once	
2	Yes, 2 or 3 times	
3	Yes, more than 3 times	
4	Live or have lived on a farm	
5	No, never	
9	(Don't know/ref) <i>DO NOT READ OUT</i>	

**ALL RESPONDENTS****Q25**

Has your view on farm animal welfare been influenced by stories or information from the following sources over the last few years?

ONE ANSWER FOR EACH OPTION

	<i>READ OUT</i>	Yes	No	Don't know/Ref <i>(DO NOT READ OUT)</i>
	Has your view been influenced by ...	1	2	9
25.1	Mass media, like TV, radio, newspapers			
25.2	Friends, family and/or colleagues			
25.3	Animal protectionist campaigns			
25.4	MASK IF Q24 = CODE 5 (NEVER BEEN TO FARM) Visits to farms			
25.5	Product information/labelling			
25.6	Government advertising or information			

**Thank you. We've finished the survey, I would just like to ask a few quick questions that will help us analyse our responses.**

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED Q26:**

IF SINGLE HOUSEHOLD AT SCREENING QUESTION S3, GO TO D3

IF MORE THAN 1 PERSON IN HOUSEHOLD AT SCREENING QUESTION S3, CONTINUE TO D1

**FILTERED (IF PEOPLE IN HOUSEHOLD UNDER 18 OR OVER 80)**

**IF HOUSEHOLD AT S3 MORE THAN 1 AND DIFFERENCE BETWEEN 'TOTAL IN HOUSEHOLD' AND '18-80 HOUSEHOLD' AT S4 IS ONE OR MORE ASK ...**

**D1**

**How many children do you have in your household who are younger than 18 years old?**

--	--

CHECK – THIS NUMBER PLUS S4 CANNOT BE MORE THAN S3

**FILTERED (IF NOT SOLO HOUSEHOLD)**

**ONLY ASK IF MORE THAN 1 PERSON IN HOUSEHOLD AT S3**

**D2**

**And, which of the following best describes your household situation?**

ONE ANSWER

*READ OUT*

<b>1</b>	<b>Married or a couple living with or without children</b>
<b>2</b>	<b>Single parent living with children</b>
<b>3</b>	<b>You live with parent/s</b>
<b>4</b>	<b>Other</b>
<b>5</b>	<b>Rather not say</b>

**ALL RESPONDENTS**

**D3**

**What was the highest level of education you completed?**

EACH COUNTRY TO INSERT CODES WHICH ARE RELEVANT TO THEIR COUNTRY'S EDUCATION SYSTEM

ONE ANSWER

*DO NOT READ OUT, BUT PROBE AS NECESSARY*

<b>1</b>	<b>Basic (7 years or less)</b>
<b>2</b>	<b>Intermediate 8-10 years or with vocational training</b>
<b>3</b>	<b>11-13 years (High school)</b>
<b>4</b>	<b>University low level – 1-3 years</b>
<b>5</b>	<b>University high level – more than 3 years</b>
<b>97</b>	<b>Refused</b>
<b>99</b>	<b>Don't know</b>

e.g.

UK = if necessary, probe for age when stopped education and probe/code as appropriate (according to approximate age of respondent):

**DO NOT READ OUT**

- 1 Left school at 16 or younger with no real qualifications
- 2 Left school at 16 with O Levels or CSE equivalent
- 3 Left school at 17/18 with A Levels/GCSE (or equivalent) or vocational further education (such as HNC/HND etc)
- 4 Completed first degree (BA/BSc, Bachelors)
- 5 Completed higher/postgraduate degree (MA, MSc, Masters, PhD etc.)
- 97 Refused
- 99 Don't know

**ALL RESPONDENTS**

**D4**

**Which of the following descriptions suits your current situation? Are you ...**

ONE ANSWER

*PROBE UNTIL THEY RESPOND*

1	Working (full or part-time)
2	Pensioner
3	Student
4	Unemployed
5	Full-time looking after the home
6	On full-time disability or sickness
97	Refused ( <i>DO NOT READ OUT</i> )
99	Don't know ( <i>DO NOT READ OUT</i> )

**ALL RESPONDENTS**

**D5**

**Do you live in a city, in a town or in the countryside?**

ONE ANSWER

*PROBE/CHECK AS REQUIRED*

1	In a city or suburb (over 200,000 inhabitants, incl. suburbs)
2	In a large town (over 80,000 inhabitants, incl. suburbs)
3	In a small or mid-sized town (over 20,000 inhabitants)
4	In a rural area or village (countryside less than 20,000 inhabitants)

**ALL RESPONDENTS**

**D6**

**What is your household's net monthly income or benefits AFTER taxes?**

**WRITE IN YOUR LOCAL CURRENCY – WHOLE NUMBERS ONLY – NO COMMAS**

**1 Household's net monthly income or benefits after taxes (max. 9 digits)**

--	--	--	--	--	--	--	--	--	--

**97 Refused/prefer not to say GO TO D7**

**99 Don't know GO TO D7**

**FILTERED (IF REFUSED/DK INCOME)**

**D7**

**If I read out a list of net monthly income brackets; perhaps you can just say which bracket best fits your household income after taxes.**

ONE ANSWER

*READ OUT*

USE VALUES AND CODES ON INCOME SHEET (TECHNICAL FILE) FOR YOUR CURRENCY

<b>1</b>	<b>Enter appropriate currency bracket here</b>
<b>2</b>	<b>Enter appropriate currency bracket here</b>
<b>3</b>	<b>Enter appropriate currency bracket here</b>
<b>4</b>	<b>Enter appropriate currency bracket here</b>
<b>5</b>	<b>Enter appropriate currency bracket here</b>
<b>6</b>	<b>Enter appropriate currency bracket here</b>
<b>7</b>	<b>Enter appropriate currency bracket here</b>
<b>8</b>	<b>Enter appropriate currency bracket here</b>
<b>97</b>	<b>Refused/Prefer not to say (<i>DO NOT READ OUT</i>)</b>
<b>99</b>	<b>Don't know (<i>DO NOT READ OUT</i>)</b>

**ALL RESPONDENTS**

**D8**

**What, if any, is your religion?**

ONE ANSWER

Read out only if necessary or as prompt – if Christian, probe for Catholic or Protestant or other

<b>1</b>	<b>None (include atheist/agnostic, humanist)</b>	
<b>2</b>	<b>Protestant (Church of England/Scotland, Methodist, Baptist, Presbyterian etc)</b>	
<b>3</b>	<b>Catholic</b>	
<b>4</b>	<b>Other Christian (e.g. Orthodox)</b>	
<b>5</b>	<b>Muslim</b>	
<b>6</b>	<b>Buddhist</b>	
<b>7</b>	<b>Hindu</b>	
<b>8</b>	<b>Jewish</b>	
<b>9</b>	<b>Sikh</b>	
<b>95</b>	<b>Other</b>	<b>Please specify</b>
<b>97</b>	<b>Refused (<i>DO NOT READ OUT</i>)</b>	
<b>99</b>	<b>Don't know (<i>DO NOT READ OUT</i>)</b>	

**ROUTING FOR RESPONDENTS THAT HAVE COMPLETED D8:**

IF NONE TO D8 GO TO CLOSING STATEMENT

IF ANY RELIGION TO D8 CONTINUE TO D9

**FILTERED (IF HAVE A RELIGION)****D9**

**Apart from special occasions such as weddings, funerals and christenings, about how often do you attend religious services or gatherings?**

ONE ANSWER

**READ OUT**

<b>1</b>	<b>Weekly</b>
<b>2</b>	<b>Monthly</b>
<b>3</b>	<b>Less often</b>
<b>4</b>	<b>Never</b>
<b>97</b>	<b>Refused (<i>DO NOT READ OUT</i>)</b>
<b>99</b>	<b>(Don't know/ref) (<i>DO NOT READ OUT</i>)</b>

**ALL - THANK YOU AND CLOSE**

Each agency is to write their own closing statement in keeping with their own typical interview closure.

**INTERVIEWER INSTRUCTIONS (FOR THE UNITED KINGDOM)****ANIMAL WELFARE STUDY***UK contacts*

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- **Background**

This survey is being conducted across Europe (Britain, France, Sweden, Norway, Italy, Hun-gary and The Netherlands) to find out people's attitudes to farm animal welfare. The survey is funded by the EU and is being coordinated by Animal Science universities and academic institutes across Europe. We have already conducted 25 interviews in each country to pilot the study and following the outcomes of this, we have developed a final questionnaire for the main survey. The main survey of 1500 interviews in each country is now taking place over the 2 week period commencing 12/09/2005.

- **Lessons from the Pilot Study**

The pilot study was extremely useful for developing the final questionnaire and interviewer feedback has been fully utilised. A small number of questions have been removed and interviewer advice and instructions have been added to the final questionnaire.

- **The Interview**

*Introduction*

We are keen not to 'scare' people off by introducing the animal welfare issue right at the beginning of the interview and so we have worded the introduction to explain that we are contacting them to discuss the food that they eat and the way it is produced.

The interview is quite long and so we have deliberately kept the introduction to a minimum. You will note however that there is additional text that *you have the option to use*. If you sense the respondent is

wary of the purpose of the research, this text explains that it is not connected to selling, that it is being carried across Europe to get different the views of people living in different countries and that the study is for academic research.

*Selection of households and respondent – the screening process*

We are selecting households by RDD – it is important that you record the outcome of each call carefully as we will have to provide detailed contact and response rates. Only record in-eligible calls if they are ineligible for the survey and you have a known outcome (e.g. out of age range or a business/faxmodem number).

The scope of the survey is one person per household and you can interview people aged from 18-80 years. The person in the household will be selected using the first birthday rule.

**Adapt this section according to your birthday rule procedure (below is the TNS UK in-instruction for information only)**

The respondent in each household will be selected randomly if they are in a household with other people. Of course this means that every time you get a household with only one adult 18–80 then you can interview them. There are no quotas!

If there are 2 adults in the household, the computer will select one or other person at random, so for 50 per cent of the time in this case, you can continue with your contact.

If there are 3 or more adults, the computer will either select the person you are talking to or one of the other people – when it's not the person you are talking to, this is where you have to ask for the person with the next birthday – so the selection is random.

*Always* note the name, initial, date of birth or birth, or gender and something distinctive about the person who the computer selects – if you make an appointment, the next interviewer needs to know who to ask for because we have to keep trying this person in the household – you *cannot* select again or select someone else instead.

**PLEASE NOTE DOWN ANY DIFFICULTIES YOU HAVE WITH  
THE SCREENING PROCESS**







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