Consumer Concerns About Animal Welfare And The Impact On Food Choice
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Comparative Report on Consumer Concerns about Animal Welfare and the Impact on Food Choice

The aim of this review is to examine the similarities and differences in consumer concerns about animal welfare and the impact on food choice, amongst the five EU member states participating in this project. Section I provides a brief overview of recent qualitative studies into the nature of consumer concerns about animal welfare. One of the key findings here is the paucity of such research. Section II attempts to quantify consumer concerns and here there is an abundance of data available, which suggests that there is a comparably high level of consumer concern about animal welfare across the five countries. Here, levels of vegetarianism amongst the countries are compared. Despite the evidence, there are key methodological issues to address in the definition and measurement of these concerns. Section III explores the factors that affect the nature and level of consumer concerns about animal welfare. Key consistent predictors of attitudes to animal welfare, such as sex and age differences, are reviewed. Section IV focuses on the relative markets for ‘animal-friendly’ products, and finds varying degrees and types of products available in each of the participating countries. Reasons for buying ‘animal-friendly’ products are examined to reveal the cross-national consistent factors of quality, cost, health and safety, as well as animal welfare. Section V examines consumers’ willingness to pay for improved animal welfare. The findings suggest a marked dissonance between reported beliefs and actual behaviour. Section VI reviews current national policy issues from producers, retailers, charities and governments. It also examines the role of the European Union in the history and participation in the development of animal welfare legislation. Section VII explores the animal welfare issues relating to the World Trade Organisation. Section VIII examines methodological problems and advocates a combined qualitative and quantitative approach. Section IX concludes this review with a discussion of the key findings and suggestions for potential areas of focus.
Section I
NATURE OF CONSUMER CONCERNS ABOUT ANIMAL WELFARE

Whilst there is a comparable level of concern about animal welfare in the production of food across the five member states – UK, Ireland, Germany, Italy and France – the exact nature of those concerns remain, not only divergent, but to some degree unknown. The number of qualitative studies aimed at investigating the nature of consumer concerns about animal welfare is limited. This is due, in part, to national desires to find out simply whether or not people are concerned and, if they are, how those concerns might affect purchasing behaviour. The reasons and characteristics of those concerns have not been central to scientific investigations.

In the UK, Morris (1996) concluded that the main consumer concerns were about the means of production, such as housing conditions, the use of hormone and other medical treatment, and the use of BSE-related animal feed; the transport of live animals, especially the export of live animals; and methods of slaughter. Whilst in other countries, notably Ireland, the methods of production are of substantially more concern than either transport or slaughter, the issue of transport has had a particularly high profile in the UK. From 1995, the spectacle of ‘Middle Englanders’, especially women in mid-life, protesting on the streets of small towns such as Brightlingsea, became a common sight on news reports and the subject of much debate. The issue of live exports, especially those of veal calves, dominated the news. To some extent, such coverage validated the UK’s reputation of being a nation of ‘animal lovers’, but it also raised Parliamentary concerns and instigated academic research into the travelling conditions of these animals.

In Ireland, Cowan and Mannion (1997) found consumer concerns focused mainly on intensive farming methods and, where slaughter was a concern, it was focused on the slaughter of calves for veal. In Germany, qualitative research has investigated the changing connotations of meat. In 1982, Marketing-Test und Conceptions-Forschung (MTC) reported a 70% spontaneous positive association rate for meat. The negative connotations were primarily about price and methods of production. In 1993, Schmitz found that positive images of meat had fallen to 18%, whilst negative images had risen to
54%. The German responses, over time, demonstrated that the key consumer concern in the 1980s was the price of meat, whilst in the 1990s those concerns had transformed to issues of health and animal welfare.
Section II
LEVEL OF CONSUMER CONCERNS ABOUT ANIMAL WELFARE

Whilst the respective national nature of consumer concerns remains undetermined, the comparative levels of consumer concern are similar in magnitude. A number of surveys have attempted to quantify consumer concerns about animal welfare and, across the respective countries, have found relatively high levels of reported concerns.

In the UK, the Association of Consumer Research (1998) reported that 83% of the public were concerned about intensive farming. At the height of protests about live exports, the Co-op (1995) reported that 60% of their customers felt it was important that animals were treated well, and a Gallop poll (1995) revealed that 71% of consumers believed that retailers should be more responsible for the welfare of animals. A NOP poll (1997) reported 78% of consumers wanted to see an improvement in animal welfare. Bennett (1998) found that 86% of the sample stated that they were concerned (41% being 'very concerned') about animal welfare. These high reported levels of consumer concern must be considered against a backdrop of actual behaviour. Although Richardson et al. (1993) reported that 25% of consumers were decreasing their meat consumption, the Meat and Livestock Commission (MLC) found that, from 1980 to 1996, the consumption of meat increased from 3,831,000 tonnes to 4,136,000 tonnes, which translates as an increase from 63.4 kg per capita to 67.6 kg per capita. Thus, both concern about animal welfare and meat consumption has increased in the UK.

In Kiel, Germany, Ziehlberg and Alvensleben (1998) questioned consumers about their recollections of food issues in the media. 92% of consumers remembered ‘BSE or swine fever’, whilst 58% remembered ‘appropriate husbandry’ (animal welfare) and 49% stated health issues related to genetic engineering, salmonella and the use of hormones. Media coverage of animal welfare-related issues certainly affect the salience of those issues in the minds of the public, as is evident from the UK reports on the issue of live exports. Furthermore, a survey by Emnid (1997) reported that 81% of consumers found animal transport cruel, echoing the concerns of the British public, and the majority believed that ‘animals today are kept less appropriately than in former times’. A 1996 survey for the
Sample Institut reported that 45% of consumers replied, when asked, that they believed factory farming to be as bad as slavery. Noelle-Neumann and Kocher (1997) reported that 64% associated poor animal welfare with BSE. This report illuminated Kunzner’s (1989) finding that 75.4% of consumers distrusted meat, fish and poultry because of their concerns about the use of hormones and possible chemical residues.

Will and Balling (1988) report that 77% of German consumers believe that meat quality is affected by husbandry practices and that free-range products taste better. Alvensleben and Vierheilig (1985) found that consumers believe that eggs from free-range hens tasted better than eggs from non-free range hens. They concluded that consumers were becoming concerned about agrochemicals. Indeed, consumers may use animal welfare as an indicator of quality and health (Becker et al., 1997). In Ireland, a Bord Bia (1995) study reported that 11% of consumers replied spontaneously that they were concerned about cruelty. However, their main concern was for the use of growth promoters and chemicals, and food safety and health issues. These issues are more important to Irish consumers than animal welfare. However, in 1996, when asked by Bord Bia whether they were concerned with animal welfare, 68% replied that they were. Similar to the German case, Mannion (1998), based on the findings of Issandou (1996), reported that animal welfare was a factor in Irish consumers’ perception of the quality of meat. CiWF (1997) report, in accordance with this, that the safety of food and good animal welfare standards are two sides of the same coin.

In Italy, a Gallup (1995) survey investigating attitudes to veal consumption reported that 88% of consumers were concerned with animal protection. Out of those who did not eat veal, the majority (38%) cited taste as the reason, as compared to price (19%), or being vegetarian (14%). Only 7% cited ‘cruelty’ as their reason for avoiding veal. 76% of those polled said they had never heard of the veal crate system, however, when informed of it, 90% expressed concern. 50% of those concerned, believed it was possible to produce veal in a more humane manner. In a previous project (EU DGXII-Fair Project 95-0046), 76.1% agreed strongly with the statement: “I prefer to buy meat from animals
which I know have been treated well”. 89% agreed strongly with the statement: “We should have more respect for animals”.

In France, an INRA-CORELA (1998) survey revealed that 42.7% were concerned with the rearing of animals, 32.1% were concerned with transport, 17.1% were concerned with the methods of slaughter and 8.2% reported that they had no concerns about animal welfare. From the same survey, 71.1% reported that it was ‘very necessary’ to take animal welfare into consideration, 23.7% said it was ‘necessary’, 3.5% reported it was ‘not actually necessary’ and 1.7% said it was ‘not at all necessary’. There is highest concern about veal calves and battery hens; however, forced feeding of geese and ducks to produce foie gras was found to be more acceptable.

In conclusion, although there are concerns with different aspects of animal-based food products – varying across issues of rearing, transport and slaughter – there also appear to be some common threads which tie the individual countries’ studies together. These may be summarised as:

- A relatively low spontaneous concern with animal welfare in relation to food production.
- A relatively high expressed concern when consumers are asked specifically about animal welfare in food production.
- More concern with quality, cost and health issues than animal welfare.
- The use of animal welfare as an indicator of food quality, cost and health.
- Lack of knowledge about the specifics of production systems.
- Methodological issues relating to closed-choice versus spontaneous answering; the effect of media coverage of specific issues; social answering (self-presentation, conformity effects, etc.)
Table 1: Comparative Levels of Consumer Concern about Animal Welfare

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>YEAR</th>
<th>SOURCE</th>
<th>CONSUMERS</th>
<th>ISSUES</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>1995</td>
<td>Gallup</td>
<td>71%</td>
<td>Retailer responsibility</td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>Association of Consumer Research</td>
<td>83%</td>
<td>Intensive farming</td>
</tr>
<tr>
<td></td>
<td>1998</td>
<td>Bennett</td>
<td>86%</td>
<td>Animal welfare</td>
</tr>
<tr>
<td>Germany</td>
<td>1987</td>
<td>Will and Balling</td>
<td>77%</td>
<td>Meat quality affected by husbandry practices</td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>Emnid</td>
<td>81%</td>
<td>Transport</td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>Noelle-Neumann and Kocher</td>
<td>64%</td>
<td>BSE associated with poor animal welfare</td>
</tr>
<tr>
<td>Ireland</td>
<td>1996</td>
<td>Bord Bia</td>
<td>68%</td>
<td>Animal welfare</td>
</tr>
<tr>
<td></td>
<td>1998</td>
<td>Mannion</td>
<td></td>
<td>Quality of meat and animal welfare</td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>EU FAIR – The National Food Centre</td>
<td>81%</td>
<td>Respect for animals</td>
</tr>
<tr>
<td>Italy</td>
<td>1995</td>
<td>Gallup</td>
<td>88%</td>
<td>Animal protection</td>
</tr>
<tr>
<td></td>
<td>1995</td>
<td>EU FAIR</td>
<td>89%</td>
<td>Respect for animals</td>
</tr>
<tr>
<td>France</td>
<td>1998</td>
<td>INRA-CORELA</td>
<td>71.1%</td>
<td>Animal welfare</td>
</tr>
</tbody>
</table>

2.1. Levels of Vegetarianism

Combris (1990) claims that 2% of the French population are vegetarian for both health and ethical reasons. In Ireland, estimates of the level of vegetarianism vary from 1.6% (Foley, 1998) to 2-3% (Corbett, 1997). Quoting the National Health survey, the MLC report that 3% of the UK claim to be vegetarian. Compassion in World Farming (CIWF)
state that three millions Britons are vegetarian (4.5% of the population). They also report that another four million have stopped eating red meat. The growth in the number of vegetarians in the UK is supported by other surveys (e.g. Mintel, 1996).

Table 2: Comparative Number (As Percentage of Total Population) of Vegetarians

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>LOWEST ESTIMATE</th>
<th>HIGHEST ESTIMATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>3% (MLC)</td>
<td>4.5% (CiWF)</td>
</tr>
<tr>
<td>Ireland</td>
<td>1.6% (Foley, 1998)</td>
<td>2-3% (Corbett, 1997)</td>
</tr>
<tr>
<td>France</td>
<td>1.5-2% (Ouédraogo, forthcoming)</td>
<td>-</td>
</tr>
<tr>
<td>Germany</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Italy</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Table 3: Number of Vegetarians in Selected EU Member States, 1995

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>NUMBER</th>
<th>PROPORTION OF POPULATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>2,600,000</td>
<td>4.5%</td>
</tr>
<tr>
<td>Germany</td>
<td>4,030,000</td>
<td>5.0%</td>
</tr>
<tr>
<td>France</td>
<td>500,000</td>
<td>0.85%</td>
</tr>
<tr>
<td>Italy</td>
<td>700,000</td>
<td>1.25%</td>
</tr>
<tr>
<td>Ireland</td>
<td>75,200</td>
<td>1.6%</td>
</tr>
</tbody>
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Section III
FACTORS AFFECTING THE NATURE AND LEVEL OF CONSUMER CONCERNS ABOUT ANIMAL WELFARE

There are several consistent predictors of consumer concerns for animal welfare. Gender, age, level of education, socio-economic status, living in urban or rural areas, regional differences, pet ownership and consumption of organic food, all predict attitudes to animal welfare. These predictors are generally consistent across the member states, with slight variations in level and strength of prediction.

3.1. Gender Differences
The French INRA-CORELA (1998) survey revealed that men (44%) were less concerned than women (56%) about animal welfare. In Germany, Emnid (1997) found that women were more concerned about “appropriate husbandry” than men. In the UK, Bennett (1997) reported that women are more concerned about animal welfare, and are willing to pay more for improved animal welfare as compared to men. Herzog et al (1991) also found that people with more ‘feminine’ characteristics were more likely to be concerned about animal welfare than people with more ‘masculine’ characteristics.

3.2. Age Differences
In France, the INRA-CORELA (1998) study revealed that consumers over 65 years old agreed most that farmers were to blame for poor animal welfare standards. The Italian Gallup (1995) survey reported that the young (18-24 years) are less likely not to eat veal for taste reasons (27%) than for being vegetarian (55%). In Ireland, older people are more likely to be concerned about health whereas younger people are more likely to be concerned about ethical issues in relation to animal-based food production (Corbett, 1997).

3.3. Level of Education
In Germany, the Sample Institute (1994) found that people with a lower level of education were more likely than people of a higher level of education to think that taste was more important than the welfare of the animals. Balser (1994), citing the Sample Institute survey, reported that people with a university degree were more likely to be
concerned about animal welfare than people without a university degree, and they were more likely to be willing to pay more for improved animal welfare.

3.4. Socio-economic Status
The French INRA-CORELA (1998) survey revealed that those consumers with relatively lower socio-economic status were more likely not to consider animal welfare necessary. Unsurprisingly, Balser (1994) reported that Germans with a higher income would be more willing to pay for improved animal welfare compared to Germans with less income.

3.5. Rural versus Urban
The French INRA-CORELA (1998) survey revealed that those consumers who had grown up in rural areas were more concerned about animal welfare, and that they were less willing to pay for improved animal welfare conditions. This may appear paradoxical because those consumers would have had greater knowledge of modern farming methods. However, it is actually likely to be true for the same reasons that farmers and other agricultural workers would be less willing to pay for improved animal welfare.

3.6. Regional Differences
In Germany, the Sample Institute (1994) found that people from East Germany were more likely than people from West Germany to think that taste was more important than the welfare of the animals. Wildner (1998) reports that East Germans are also less willing to pay for animal welfare than West Germans. These findings are likely to be linked to relative deprivation.

3.7. Pet Ownership
The French INRA-CORELA (1998) survey revealed that pet owners expressed higher levels of concern than non-pet owners. In Italy, pet ownership is a predictor of concern for animal welfare and consumption of ‘animal-friendly’ products. In the UK, Paul and Serpell (1993) found a positive correlation between childhood pet keeping and positive attitudes to pet animals and increased concern about animal welfare in general.
3.7. Organic Food Consumption
The French INRA-CORELA (1998) survey revealed that consuming organic food was a positive predictor of concerns about animal welfare, with those consumers of organic food being 1.6 times more likely than the general population to be concerned. Italian consumers who eat less meat and relatively more organic food are also more likely to be concerned about animal welfare. In Germany, the 1994 Sample Institut survey found that consumers of organic meat were more likely than non-consumers to disagree with the statement: “I do not care how they keep the animals, what counts is the taste of it”. Furthermore, Balser (1994) revealed that consumers of organic meat were more likely than non-consumers to be concerned about animals generally, and more willing to pay for improved standards.

Table 4: Proportion of respondents agreeing strongly or slightly with statement: ‘I am concerned about the welfare of animals used for meat production’, by age, income and location, 1996.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PROPORTION AGREEING STRONGLY OR SLIGHTLY (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Age</td>
</tr>
<tr>
<td></td>
<td>18-34</td>
</tr>
<tr>
<td>France</td>
<td>74</td>
</tr>
<tr>
<td>Germany</td>
<td>84</td>
</tr>
<tr>
<td>Ireland</td>
<td>77</td>
</tr>
<tr>
<td>Italy</td>
<td>82</td>
</tr>
<tr>
<td>UK</td>
<td>79</td>
</tr>
</tbody>
</table>

Section IV
THE MARKET FOR ‘ANIMAL-FRIENDLY’ PRODUCTS

Bund (1998) reports that 5% of beef and 10% of pork in Germany now carry the Central Marketing for Agriculture certificate of meat quality, which addresses issues of transport, slaughter and the use of medicine. However, these products are still intensively produced. Haris (1986) concludes that one of the main reasons most Germans buy battery eggs is because they are cheaper than deep litter eggs. The main reasons cited for buying barn eggs are animal welfare and quality. In 1998, Emnid revealed the primary factors affecting the purchase of eggs to be quality (21.8%), price (21.5%) and conditions (18.1%). In line with these findings, Hess (1991) had also reported that quality and taste were more important than animal welfare for consumers. However, Balling (1991) had concluded that process quality (for example, animal welfare) dominates product quality (for example, health, taste, etc). Nonetheless, Renken (1997) found that consumers expressed a preference for free range eggs, yet Balser (1994) had previously found that such self-reported purchasing behaviour was exaggerated and an unreliable predictor of actual purchasing behaviour. This may explain why high reported preferences for free range products does not reflect their market share.

In Ireland, Mannion (1998) concluded that the reasons for buying free-range chicken might also be as much to do with food safety as to do with animal welfare. Indeed, animal welfare does not figure in the IEFS (1996) report on influences on food choice – quality, taste, family constraints, healthy eating and price. Roddy et al (1996) found that high prices, including premiums of 20% to the consumer, were characteristic of organic food. Bord Bia report that the free range egg market of Ireland constitutes 10% of the total egg market. Whilst, Cowan, Meehan and Winkless (1998) report that premiums may vary from 26% to 95%.

Italy has seen an increase in the availability and choice of both vegetarian and organic food. In 1991, Ovopel began to produce free-range eggs. Being the only company producing free-range eggs, and having distinctive packaging, Ovopel reported a sales increase of 100% from 1994 to 1996. In 1996, a Doxa survey found that 51% of
consumers were familiar with free-range eggs and 18% of consumers had bought free-range eggs. However, a MORI poll (1998) revealed that Italy has the lowest level of awareness about different egg production methods (38% as compared to UK, France, Germany and Spain) and that free range eggs were the least known. Moreover, the Gallup (1995) survey on Italian attitudes to veal consumption revealed that 76% of consumers had never heard of the veal crate system. Furthermore, 60.2% of consumers reported that they knew what fois gras was, however the majority did not know about hepatic steatosis or gavage, indicating a rather limited knowledge of the production system of fois gras. Having been informed of the process, 81% of Italian consumers said they would not eat it.

The DOXA (1991) survey on attitudes to free range eggs revealed that, in terms of differentiating free range eggs from other eggs, 47% cited better quality, 21% cited increased freshness and 6% cited price guarantees. Animal welfare did not play a role in this process of product differentiation. A study by Eurogroup for Animal Welfare (1998) further revealed that consumers were confused about egg labeling. 44% of consumers did not know what the ‘fresh’ label meant. 24% thought it referred to battery eggs, whilst 22% believed they were free-range eggs. Eurogroup found that 64% of consumers would like battery egg packages to be labeled as ‘battery’ eggs. Eurogroup (1998) found similar confusion in France. In spite of this confusion, freshness remains a key factor in the purchase of free-range eggs for Italian consumers (Ovopel, 1994). In 1998, the first organic supermarket chain, Naturasi, was established to meet the increasing demand for organic food. Organic food remains less than 10% of the Italian food market. Organic meat forms only 0.4% of the total organic sales (Naturasi, 1998). For most organic farms, meat is a secondary product. Animals are kept mainly for milk and manure.

In the UK, a Mintel survey found that the sale of battery eggs declined, whilst the sale of free-range eggs increased by 50% from 1992-94. Demand for ‘animal-friendly’ food products is considered to be related to growing consumer concern about animal (Mintel, 1996; Sorensen, 1995) and willingness to pay (Bennett, 1997) for improved welfare.
Freedom Food Ltd was set up in the UK by the RSPCA in 1994. Its aim is to improve welfare standards of farm animals by working with farmers and the food industry in general. These standards cover the production of meat, poultry, eggs and dairy products through rearing, transport and slaughter – known as ‘birth to slaughter’ assurance. The Farm Animals Department of the RSPCA has been responsible for establishing the welfare standards. These standards are based on the Farm Animal Welfare Council’s (FAWC) Five Freedoms:

Freedom from:
- fear and distress
- pain, injury and disease
- discomfort
- hunger and thirst

Freedom to:
- express normal behaviour

Table 5: UK Freedom Food From 1994-1998

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NUMBER OF ANIMALS</th>
<th>EGG SALES</th>
<th>MEMBERS</th>
<th>NUMBER OF RETAILERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994</td>
<td>1 million</td>
<td>100 000 per month</td>
<td>119</td>
<td>400</td>
</tr>
<tr>
<td>1998</td>
<td>12 million</td>
<td>54 million per month</td>
<td>2300</td>
<td>4000</td>
</tr>
</tbody>
</table>

Freedom Food products are sold in Tesco, the Co-op, Safeway, Somerfield, Asda and Iceland.

A survey carried out by Gallup on behalf of the RSPCA (1995) found that 72% of women shoppers said the battery system was unacceptable and 86% wanted to see RSPCA monitored Freedom Food eggs in their local supermarket. In 1997, Tesco’s Steve
Murrells, reported that high welfare fresh meat counters had produced an average of 10% increase in fresh meat sales. (RSPCA News release 31 January 1997).
Section V
WILLINGNESS TO PAY

In explaining willingness to pay (WTP), Bennett (1997) drew on Mitchell and Carson’s (1989) concept of ‘whole-part bias’. This refers to the respondents’ tendency to equate the broader welfare concerns with the specific issue, in this case legislation to ban cages. He also referred to Andreoni’s (1990) notion of ‘warm-glow’ which refers to the moral satisfaction that people gain from giving to good causes rather than the benefits perceived to be associated with the good. Bennett (1997) found that WTP was correlated with:

- The stated level of concern about animal welfare.
- The acceptability of cage egg production.
- WTP towards farm animal welfare generally.
- The extent to which respondents considered legislation to ban cages to be necessary.
- Income.
- Expenditure on food.
- Level of education.

Bennett explained that although people say they support banning cage eggs, they do not behave in accordance with their reported beliefs. Consumers believe that the purchasing actions of themselves as individuals will have much less effect than legislation. Therefore, they value legislation because it affects all egg purchasing decisions rather than additional costs that would have to be met by individual consumers. This can lead to an overestimate of WTP. Bennett (1998) concluded that the findings demonstrated that animal welfare is considered to be a ‘public good’.

The French survey by INRA-CORELA (1998) found that 45% of consumers would be willing to pay for improved animal welfare standards, especially for an increase in the size of cages used to keep veal calves, pigs and hens. The Italian MORI poll (1998) revealed that 51% of consumer would be willing to pay more for free range eggs. The 1991 Ovopel survey found that 67% of consumers agreed that ‘it is fair to pay a little more’ for free range eggs. In Germany, Schulz (1997) found those consumers who
changed their consumption, as a consequence of BSE, were more willing to pay for improved animal welfare. Schulz concluded that higher involvement (in meat consumption) leads to higher willingness to pay. In 1986, Haris reported that 78% of consumers stated they were willing to pay more for deep litter eggs but only 38% bought them.

Table 6: Comparative Rates of Willingness to Pay (WTP) for Improved Animal Welfare

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>YEAR</th>
<th>SOURCE</th>
<th>AMOUNT (PRODUCT PREMIUM)</th>
<th>CONSUMERS (% WTP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>1994</td>
<td>MORI</td>
<td>12p (12%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>NOP</td>
<td>50p (25%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1998</td>
<td>Bennett</td>
<td>43p (31%)</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>1998</td>
<td>INRA-CORELA</td>
<td></td>
<td>45%</td>
</tr>
<tr>
<td>Italy</td>
<td>1991</td>
<td>Ovopel</td>
<td></td>
<td>67%</td>
</tr>
<tr>
<td></td>
<td>1998</td>
<td>MORI</td>
<td></td>
<td>51%</td>
</tr>
<tr>
<td>Germany</td>
<td>1986</td>
<td>Haris</td>
<td></td>
<td>78%</td>
</tr>
<tr>
<td></td>
<td>1994</td>
<td>Balser</td>
<td>10-20%</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>Schulz</td>
<td></td>
<td>88%</td>
</tr>
<tr>
<td>Ireland</td>
<td>No figures available</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section VI
CURRENT NATIONAL POLICY ISSUES

6.1. UK
In the UK, the following recommendations have recently been made:

- The new Farm Animal Welfare Council (FAWC) report recommended an immediate increase in the minimum space allowance in all battery cages from 450cm per hen to 600cm per hen. It further recommended that conventional battery cages be withdrawn in the long-term contingent on: ‘simultaneous phasing out throughout the European Union, the prevention of imports into the EU from countries in which conventional battery cages are still used and the elimination, or successful control, of injurious pecking and cannibalism.’ (FAWC, July 1997)

- The prevalence of lameness in dairy cattle was considered ‘unacceptable’ and the report recommended urgent steps to combat this. Infertility was a key issue as it results in high levels of ‘unplanned culling’. High infertility is considered an indicator of relatively poor welfare. The report recommended that breeding companies should treat the ‘achievement of positive welfare’ as a matter of ‘paramount importance’. The report also addressed concerns about the EU’s calf processing aid scheme, which results in the slaughter of very young calves, as well as stressing the welfare implications of per rectum ultrasonography in cattle (FAWC, December, 1997).

- In relation to the gas killing of pigs, FAWC recommended that industry develop stunning and killing methods, which minimised stressful handling. They also endorsed the phasing out of high concentrations of carbon dioxide in the air once non-aversive gas mixtures become available. In relation to the sticking of pigs and sheep in sight of conspecifics, FAWC was asked to recommend amending the law so that the sticking of animals in sight of conspecifics would be allowed. The Council (FAWC Annual Report 1998:4) agreed in relation to pigs and sheep only, and also recommended a maximum stun-to-stick interval of 15 seconds.
• Effective use of fail-safe devices on stunning equipment. Emphasis on the advantages of handling and killing in the company of an animal’s own kind, as opposed to the stressful separation of individuals from a group. Stricter implementation of the controls in relation to licensing and competence of slaughtermen. Improvement of design and management of slaughter facilities to minimise stress and substantially improve welfare (FAWC, 1998)

• The Meat Hygiene Service (MHS), an executive agency established in 1995 and responsible to MAFF, published its Animal Welfare Survey Report for 1997/8. The survey was carried out by the Official Veterinary Surgeon (OVS) who was responsible for the slaughterhouse. MHS OVSs are responsible for enforcing the Welfare of Animals (Slaughter or Killing) Regulations 1995. In all, 554 red and white meat slaughterhouses were surveyed. The aim of the survey was to ensure that plant operators ‘were fully implementing animal welfare legislation’. The survey made 342 recommendations for improvements. 103 cases of inadequate standards were recorded. The report concluded that: “The major recommendations ... relate to improvement in the provision of formal animal welfare training for plant staff and detailed written procedures for the protection of animals in plant operators’ care”.

• Animal Welfare Minister Elliot Morley (MAFF News Release, 15 January 1998) has called for common minimum standards for farm animal welfare across Europe. He called for a new directive, which would build on the new Treaty of Rome protocol, which classes animals as ‘sentient beings’. He further argued for the end of battery cages in the long-term.

Compassion in World Farming have recommended the following improvements to animal welfare, under their Charter for Farm Animals:
### Table 7: Compassion in World Farming’s Farm Animal Welfare Charter

| Housing: | All animals should have:  
Access to the outdoors;  
Comfortable bedding;  
Natural light and ventilation;  
Enough space to move and exercise naturally. |
|----------|--------------------------------------------------------------------------------------------------|
| Physical health: | Farmers should use slower-growing animals, which have a more natural life.  
Animals should not be mutilated or operated on unless it is necessary for the animal’s health.  
Animals should be fed enough of the kinds of foods they would eat naturally.  
Animals should have access to clean water at all times. |
| Mental health: | Animals should be allowed to live together in natural groups.  
Animals should not be kept on their own or in overcrowded conditions.  
Young animals should be allowed to stay with their mothers until the end of their natural weaning period.  
People who handle animals should not use painful handling methods like electrical goads. |
| General welfare: | Animals should not have to travel on long journeys.  
Livestock markets should be phased out and replaced with systems like computer marketing and direct sales.  
All those who handle animals, for example farmers and hauliers, should be licensed.  
Strict laws on proper slaughter methods must be agreed and enforced. |

### 6.2. Germany
- Key issues in Germany have focused on the transport of live animals and the prohibition of the battery system (BMELF, 1997). Retail supermarkets are increasingly providing consumers with certified-quality meat, and organic meat. Bund (1998) reports that Edeka and Rewe, two large German retailers, are involved in selling ‘animal-friendly’ meat.
6.3. Italy

- Toscana adopted the AIAB regulations, in force since January 1992. AIAB - scheme of production, 1992; Regulations / Regional Law nr. 31/94 and 54/95. Rules have been set up on the ground of the following criteria: product health, respect of ecological requirements of the animal and safety of environment.

- **Intensiveness of breeding**: Number of head must be proportional to grazing surfaces, with a maximum of 3 UBA per ha.

- **Races**: Preferably local races, with strong environmental adaptability.

- **Housing**: Permanent housing is forbidden; minimum practicable surfaces are set up according to the species, along with technical standards for the housing premises.

- **Interventions on anatomy and physiology of the animal**: Castration and mutilations are prohibited, with a few specific exceptions. Fertilisation must be natural and insemination is allowed only in specific cases. Embryo transfer is forbidden, as well as embryo and cell manipulation.

- **Feeding**: Forced feeding is prohibited.

- **Origin**: feed must be from organic farms, with the sole exception of integration through non organic feed up to a maximum 20% dry matter in daily ration. Drugs and feed enriched by pharmaceutical products are anyway forbidden. The regulations concern also: the *typologies* of fodder and complementary products; the *use* of concentrated additives and by-products; suckling and weaning.

- **Veterinary Activities**: Pyotherapy, homeopathy, isopathy and natural medicine are allowed. Only two allopathic medicine treatments are allowed over the whole animal life.

- **Hygiene of premises**: The regulations specify the allowed products.

- **Conversion to organic zootecanical production**: The regulations set up different times for every single species.
6.4. Ireland

- The Tesco’s 1997 ban on pork from stalls and/or tethered pigs has not yet reached Ireland.

- The Bord Bia Quality Assurance Scheme aim to ensure high levels of animal welfare, and production plants are required to have a trained animal welfare officer on site. There is a comprehensive legislative framework in place, however, it is difficult to assess how important animal welfare in itself is to consumers.

- The Scheme covers beef, pork and egg quality. Although the scheme is not legislatively applied, it does contain various aspects of legislation relating to animal welfare. Bord Bia inspect producers to ensure that their production of animal-based products meets the requirements of the Quality Assurance Scheme.

- The overall findings suggest that consumers are more concerned with production than either transport or slaughter.
6.5. European Union
The Council of Europe has set up five Animal Welfare Conventions. States given in brackets have signed the Convention but not yet ratified it (Knierim and Jackson, 1997:253):

<table>
<thead>
<tr>
<th>European Convention</th>
<th>Contracting parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>1968 for the Protection of Animals during International Transport</td>
<td>The 15 EU-member states, Cyprus, Iceland, Norway, Romania, Russia, Switzerland, Turkey</td>
</tr>
<tr>
<td>(supplemented by a Protocol of 1979 permitting, in particular, accession by the European Community)</td>
<td></td>
</tr>
<tr>
<td>1976 for the Protection of Animals Kept for Farming Purposes</td>
<td>The 15 EU-member states, Bosnia Herzegovina, Croatia, Cyprus, Iceland, Macedonia, Malta, Norway, Slovenia, Switzerland, EC</td>
</tr>
<tr>
<td>(supplemented by a Protocol of Amendment of 1992)</td>
<td></td>
</tr>
<tr>
<td>1979 for the Protection of Animals for Slaughter</td>
<td>(Belgium), Bosnia Herzegovina, Croatia, (Cyprus), Denmark, Finland, (France), Germany, Greece, Ireland, Italy, Luxembourg, Macedonia, Netherlands, Norway, Portugal, Slovenia, Sweden, Switzerland, (United Kingdom, EC)</td>
</tr>
<tr>
<td>1986 for the Protection of Vertebrate Animals Used for Experimental and Other Scientific Purposes</td>
<td>Belgium, Cyprus, (Denmark), Finland, (France), Germany, Greece, (Ireland, Netherlands), Norway, Spain, Sweden, Switzerland, (Turkey, UK, EC)</td>
</tr>
<tr>
<td>1987 for the Protection of Pet Animals</td>
<td>Belgium, Cyprus, Denmark, Finland, Germany, Greece, (Italy), Luxembourg, (Netherlands), Norway, Portugal, Sweden, Switzerland</td>
</tr>
</tbody>
</table>

During the summer (1998), EU Farm Ministers agreed new common standards for farm animals across Europe. The new directive means that farmers are obliged to 'take all
reasonable steps to ensure the welfare of animals under their care." The achievement of a general welfare directive was a key aim of Britain’s Presidency of the Agricultural Council.
Section VII
ANIMAL WELFARE AND THE WTO

The market for 'animal-friendly' products is complicated by the General Agreements on Tariffs and Trade (GATT), a significant part of the World Trade Organisation’s (WTO) policy. Improved animal welfare standards are closely linked with non-product related Process and Production Methods (PPMs) but any distinction among products based upon methods of production is disallowed under the Articles of the GATT. Article XX of GATT specifies exemptions to previous constraining Articles and could provide a legal justification for pursuing animal welfare measures that would not contravene other Articles of GATT. However, a narrow interpretation of Article XX by WTO has precluded this possibility.

Eurogroup for Animal Welfare (Conflict or Concord? Animal Welfare and the World Trade Organisation, 1998:14) have made several recommendations in light of this problem:

- A new political initiative is required to achieve progress on establishing a complementary relationship between trade liberalisation objectives and domestic or international measures to protect people, animals and the environment.

- The WTO cannot resolve these problems alone – it needs to establish a practical dialogue involving Non-Governmental Organisations (NGOs), International Agencies and WTO members.

- The difficult question of how to make legitimate distinctions between products on the basis of non-product related PPMs should now be addressed urgently by the WTO – constructive proposals on how best to accommodate such distinctions should be presented for decision no later than the third WTO Ministerial Conference.

- An official interpretation confirming that Article XX (a) and (b) includes animal welfare measures is required.
• Article XX needs to be generally reviewed by the WTO Council, specifically with regard to facilitating a broader application of the chapeau, reversing the current burden of proof and establishing improved criteria for assessing the necessity of national policy measures.

• The Committee on Trade and Environment (CTE) should be instructed to conclude its discussion on the compatibility of Multilateral Environmental Agreements (MEAs) and WTO rules and to present proposals for discussion by the General Council, ideally before the end of 1998.

• Voluntary labelling schemes should be quickly acknowledged as compatible with WTO rules and the CTE should instead turn its attention to discussing a framework for the utilisation of mandatory schemes.

• Strict timetables need to be established for the discussion of each of these issues, to include specified review and decision points that will ensure a political input sufficient to achieve an early resolution.

Kohler (1998) makes the following recommendations:

• Are trade measures the first option as the most efficient way to address issues of animal welfare? If not, there could be detrimental effects for both humans and other animals.

• The issue of animal welfare might easily be misused for protectionist purposes. There could be large welfare losses in the world if protectionism gained ground.

• Is animal welfare an international public good or a good which causes transboundary externalities? This is a prerequisite for considering any exemption rules from an economic perspective.
Section VIII
METHODOLOGICAL ISSUES

This comparative review has revealed a number of methodological issues which will need to be addressed at the empirical stages in the project and are, therefore, worthwhile discussing now.

A major concern relating to the quantitative research is the relative lack of qualitative work. This suggests two major sources of inadequacy – imposing definitions of animal welfare on consumers and dictating the types of issues, which are said to be of concern. The role of qualitative research is to ascertain the types of issues that consumers themselves are concerned about, and to generate typographies of their own definitions – to understand their concerns from their point of view. It is only after this initial exploration into consumer constructions and perceptions of animal welfare, that a valid and reliable measure of consumer concerns can be undertaken through a more quantitative approach. This criticism does not invalidate the quantitative findings presented here, for, despite the methodological problems, there are some clearly consistent findings. However, it does present a challenge to this project to investigate further both the nature and extent of national and comparative consumer concerns. Allowing consumers to speak for themselves will provide insight to the nature, salience and consistency of their concerns about animal welfare.

There are other issues concerning quantitative research, which would be addressed through preliminary qualitative research. Attitudes are not the stable, inert constructs they were once thought to be. Indeed, social values change according to time and place and, whilst this is not a longitudinal study, it does attempt to gain some intra- and intercultural understanding of variations in concerns about animal welfare. The problem with closed surveys is that they are often presented as a tool, which can be used across time and culture. The literature on the social and psychodynamic construction of meaning, attitudes and values has revealed the fallacies associated with a purely positivistic approach. This is not to suggest that qualitative research is in itself superior to, or should replace, quantitative research. Rather, these two empirical ways of seeing
are complementary and dependent on each other for the full picture, for depth as well as extent, for the dynamic as well as the static.

Underlying these issues are the well-known empirical dilemmas of conformity effects, presentation bias and experimenter effects. Sound rigorous piloting will refine the tools of research to minimise the artificiality of the research process. Where expressed concerns about animal welfare do not tally with actual behaviour, it is not necessary to conclude that the research failed to provide natural conditions, rather it may be crucial to determine why such dissonance exists, beyond the confines of the experimental situation.
There are some consistent and predictable similarities amongst the participating countries. In each of the countries, there is quantitative evidence to suggest a high level of reported consumer concern for animal welfare. In each of the surveys mentioned, the majority of respondents expressed concern about animal welfare. It is equally clear, that consumers are concerned about other product characteristics such as quality, cost, health benefits or detriments and safety. In many cases these concerns supercede concerns about animal welfare and, in these cases where animal welfare is a significant concern, it is often as an indicator of these other attributes. Levels of vegetarianism are comparable, although, as with previous findings, it is the UK and Germany which report having the highest levels of vegetarians. In many cases, the pattern of meat consumption has changed. A variety of reasons have been cited, including the BSE scare of 1996, other food safety issues, for health reasons and because of animal welfare. It is not clear to what extent these individual factors vary across the countries, although one key consistent finding is the subordinance of animal welfare to these other concerns.

Where factors affecting the nature and level of consumer concerns about animal welfare were given, it became clear that gender is a consistent predictor of attitudes towards animals and willingness to pay for improved welfare. Women were predominantly more concerned with animal welfare compared to men. In all countries there are higher rates of vegetarianism in the young and this fact affects the attitudes of the young to animals. Young people are more likely than older people not to eat meat for ethical rather than health or financial reasons. The relationship between level of education and socio-economic status is likely to be co-determinant. Having a higher level of education is likely to improve the socio-economic status of that person. This, in turn, is likely to permit those people to state that they are more concerned about animal welfare and, because they have the resources to do so, would claim to be more willing to pay for improved animal welfare, than people of a lower educational standard or lower socio-economic status. Relative deprivation is likely to predict the differences found between Germans from the East and those from the West. In the case of rural versus urban
consumers, the French findings may be indicative of fundamentally differing attitudes towards animals between the town and country people. Here social identity may play a crucial role, as was transparent in the UK’s debate on fox hunting.

Pet ownership is an interesting and consistent finding which will require further qualitative analysis. The role of pet animals as members of human families, as honorary humans, necessitates a consistent and determined anthropomorphism. The personification of pets builds emotional bonds, especially for children. As the boundaries are broken down between perceptions of pet animals and farm animals, it will be inevitable that pet owners be amongst the first segment of consumers to recognise the issues of sentience and potential suffering. The breakdown of these boundaries, however, requires an informed public with access to the science of animal welfare, not only the sentimentality of media coverage.

The relationship between animal welfare and the organic food industry is undeniable. Consumers of organic food are likely to be concerned about animal welfare, as they are about the environment and health issues. They are also more likely to have a higher socio-economic status, be able to pay the premiums on organic food and report that they are willing to pay more for improved animal welfare. But the relationship between animal welfare and the organic industry is by no means clear. It is not, for example, necessary that organic meat be the product of an extensive system of production with high animal welfare. Given the national regulations about organic farming, it is more likely that organic meat is the product of higher welfare standards but it cannot be taken for granted. Consumers who are interested in avoiding meat with injected or ingested hormones or other chemicals will choose organic meat for that reason, and not necessarily be concerned that the animal that meat came from had lived their life according to the Five Freedoms. Organics and welfare are not interchangeable systems, although there is a large degree of overlap. Consumer perceptions of the similarities and differences between these systems will be of substantial interest to the project.
As for the market for ‘animal-friendly’ products, increasing concerns about animal welfare have led producers and retailers to initiate a number of strategies to assuage consumer fears. Legislation, at both the national and European levels, is certainly in place. But changing definitions of animal welfare, with scientific advancements in the study of animal suffering, have meant that the law may drag behind consumer concerns. It has made good marketing sense for companies to promote themselves as the guardians of animal welfare. An increasing number of retailers are stocking ‘animal-friendly’ products, including organic products. The vast majority of animal-based products are still produced in intensive systems throughout the five countries, but the market for ‘animal-friendly’ products is a growing one.

What is particularly interesting, in terms of the impact that consumer concerns about animal welfare has had on food choice, are the reasons for the demand for ‘animal-friendly’ products. Certainly, the evidence suggests that ‘free range’ tastes better, is better for your health and happens to be better for the animal concerned. Here, it is not clear to what extent measures of willingness to pay are actual measures of willingness to pay for improved animal welfare, or improved human welfare.

Each of the five participating countries report on similar policy issues relating to the rearing, transport and slaughter of animals used in food production. The details of national legislation differ, but those differences are becoming increasingly meaningless under the rule of European law. Regulations and Directives are set out to govern the welfare of animals used in the production of food, from their births to their deaths. Scientific research aims to inform such legislation to accurately reflect the welfare requirements of agricultural, and other, animals. The most significant change in European law is the redefinition of animals from ‘agricultural products’ to ‘sentient beings’. Sentience is central to the argument for animal welfare and in the scientific research laboratories across Europe, sentience is no longer in dispute. What is being debated is the trade-off between human welfare and animal welfare. At the heart of this is a new meaning of willingness to pay – the renunciation of old ideas and ideologies about animals. This, then, is the crux of the matter. If consumers are concerned about
animal welfare, to what extent is that concern about the animals themselves. If that concern is about the animals, are consumers willing to pay both financially and ideologically, for the redefined status of agricultural animals?
Section X
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FOCUS GROUP
DISCUSSION GUIDE

- General concerns about food, particularly animal-based products.
- Meanings associated with animal production practices.
- Existing knowledge about animal production practices.
- Extent and reasons for concern about animal welfare.
- Existing consumption of 'animal friendly' products.
- Differences in welfare concern for individual animal products.
- Perceived benefits of improved animal welfare for animals.
- Perceived benefits of improved animal welfare for consumers.
- Trade-offs between animal welfare, price and other product attributes.
- Impact on purchasing behaviour and the likely effects of changes in animal production practices.