



Briefing – Landmark consumer research reveals overwhelming support for method of production labelling of meat and dairy products

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Delivering market-driven improvements in farm animal welfare

The European Union's Strategy for the Protection and Welfare of Animals 2012-2015 emphasises the EU's intention to empower consumers to make informed choices in order that the market can drive further improvements in farm animal welfare.

The Labelling Matters¹ campaign believes mandatory method of production labelling of meat and dairy products is the best way for the Commission to deliver on this central aspect of its strategy. Clear, objective labelling provides consumers with the information they most want to know: 'how was this animal kept?'

This landmark consumer research shows:

- Very strong support for extending method of production labelling to meat and dairy products,
- High levels of recognition of the EU's existing egg labelling scheme,
- Strong support for the chicken meat labelling terms proposed by Labelling Matters,
- Support for these labelling terms to be backed with robust outcome-based assessments,
- Strong support for useful information on food packaging.

The figures in this consumer research, undertaken by independent consumer analysts Qa², on behalf of Labelling Matters, prove once and for all that consumers from across Europe want honest labelling of meat and dairy products.

The European Commission's position has been influenced by earlier research undertaken by the UK's Department of Environment, Food and Rural Affairs³. We feel the UK study was unsatisfactory as it gave no detailed consideration to the success of the egg labelling scheme. Moreover, it erroneously assumed that high welfare can be achieved in all production systems, whereas scientific research shows that certain intensive production systems are intrinsically incapable of delivering high welfare outcomes.

Furthermore, Defra's research recorded the opinions of just 96 people. Qa's research, on behalf of Labelling Matters, recorded the opinions of thirty-times more consumers.

Three-quarters of consumers want clear labelling

This independent research shows unequivocal support by consumers for the extension of method of production labelling, based on the mandatory method of production labelling system required for shell eggs⁴, to all meat and dairy products sold in the European Union (UK: 83% of consumers, Czech Republic: 78%, France 92%).

Labelling Matters believes this research is the most comprehensive to have taken place on animal welfare-related food labelling in Europe since the Eurobarometer 229/2005⁵ and Eurobarometer 270/2007⁶.

A total of 3,003 interviews (1,001 in each survey nation) were completed by a representative sample of consumers in each country⁷.

Labels can be misleading under current rules

The first section of this report records consumer responses to five potentially misleading and unclear meat and dairy labels, sourced from retail shelves in supermarkets in the countries surveyed between June and September 2012. The samples selected for this research were representative of those found on the shelves, and included labels from Czech Republic, France, Germany and the UK. Detailed evidence of the extent of misleading labelling will be published in September 2013.

Qa's independent analysis concludes that, 'Based on packaging alone, there is genuine confusion amongst many consumers regarding the method of production used to produce meat and dairy foods.'

Importantly, this was the case even for those respondents who felt they had a good knowledge of 'how farm animals are kept and reared', and those who felt that they could 'easily identify from the label those products sourced from animal welfare friendly production systems'.

Labelling Matters is concerned that labels on many meat and dairy food products use words and pictures to imply higher welfare, even when the food has been produced from animals reared in standard intensive farm systems. Idyllic rural scenes and terms such as 'country fresh' are frequently used, and appeal directly to people's sense of rural life.

Qa concludes, 'These findings suggest that there is a need for increased clarity regarding method production on meat and dairy products.'

The importance of animal welfare to consumers

The second part of Qa's research focussed on consumer attitudes to animal welfare and their interest in method of production labelling.

In 2005 and 2007, Eurobarometer research showed EU-wide concern for animal welfare and proved that animal welfare is an important influence when people shop for food.

Qa's research shows that this concern has remained high. In the UK, 79% of consumers answered that animal welfare is very important or quite important to them when deciding which meat and dairy products to buy. In the Czech Republic, it was 60% of consumers. In France, it was 80%.

This finding is consistent with egg-buying trends in the UK (where data is easily accessible). Higher welfare egg production (extensive indoor, free range and organic) increased from 31% in 2004, when mandatory method of production labelling was first introduced, to 51% in 2011⁸. It is important to note that despite three years of financial slowdown the number of people choosing higher welfare options continued to increase. This indicates that where clear, objective information is provided, many consumers will choose products from higher welfare systems.

Qa also notes that many consumers, 'see standards of animal welfare as a barometer for other important issues such as food quality, health benefits and levels of nutrition.'

High level of recognition for EU egg labelling scheme

Qa's research provides strong evidence to suggest a comparatively high level of recognition of the EU egg labelling scheme. Qa found 48% of consumers are actively aware of the EU egg labelling system in the UK. In the Czech Republic, it was 61%, and in France, it was 68%.

They found that 61% of UK consumers found 'the EU system for labelling eggs by method of production is very helpful or quite helpful to them when choosing what to buy.' In the Czech Republic, it was 55%, and in France, it was 79%.

This can be compared with research undertaken by UK consumer watchdog, Which?, in early 2010, which tested awareness of a range of food labelling schemes amongst a representative sample of the UK population. The UK's Red Tractor food label was introduced in 2000, but received only a 20% recognition rate. The RSPCA's Freedom Food label was introduced in 1994, and also received a 20% recognition rate.

Qa also concluded that many people who claim that they don't use the egg labelling scheme may actually do so without realising that they are.

Strong support for method of production labelling

Qa concludes that, 'More than four-fifths [of consumers] in each country said that they would like to see the egg labelling system extended to 'all meat and dairy products'. (UK: 83%, Czech Republic: 78%, France: 92%)

More than two-thirds of consumers thought 'that method of production labelling terms, like those which exist for eggs, definitely or usually provide clear information for them to make an informed choice.' (UK: 73%, Czech Republic: 70%, France: 82%)

There was also strong support for method of production labelling to be supplemented by outcome-based assessments on farms, which can be used to ensure that systems generally felt to be associated with higher welfare (outdoor and extensive indoor systems) are indeed delivering good welfare.

More than three-quarters said, 'they would definitely or probably be more confident about these labelling terms if they were backed by on-farm assurance schemes that measure welfare'. (UK: 82%, Czech Republic: 75%, France, 87%)

Qa concluded that method of production labelling systems, 'not only attract those interested in animal welfare, but also have appeal amongst many who have perhaps not considered animal welfare before or are more concerned with other factors when deciding what to buy, such as price.'

Support for poultry labelling terms proposed by Labelling Matters

The third section of this research focussed on specific proposed method of production labelling terms for poultry meat.

In early 2013, members of the Labelling Matters partnership agreed to recommend mandatory poultry labelling terms, similar to those used in the EU egg labelling scheme, and based on the EU's existing poultry meat marketing regulations. (These do not require poultry meat to be labelled but set the standards that must be met if such meat is labelled 'free range' or 'extensive indoors'). These terms are, 0 = organic, 1 = free range, 2 = extensive indoor, and 3 = intensive indoor.

A majority of consumers in each country supported the introduction of the proposed system and felt that it was 'clear'. (UK: 70%, Czech Republic: 70%, France 63%)

More than three-quarters thought that if this poultry meat method of production labelling system was introduced they'd be 'very likely' or 'quite likely' to use it. (UK: 75%, Czech Republic: 75%, France: 85%)

Interestingly, the majority of those who are aware of the EU egg labelling system but say they don't currently use it thought they'd be more likely to use a similar system to buy poultry meat (UK: 69%, Czech Republic: 71%, France: 82%). This suggests a strong consumer desire for clear poultry meat labelling.

Importantly, consumers also wanted method of production information to be clear and obvious, displayed 'on the front of the packaging/clear and visible, so it's easy to see'. (UK: 83%, Czech Republic: 82%, France, 91%)

Conclusions

The European Commission is still resisting clear, objective method of production labelling, but this independent research produced for the Labelling Matters campaign compellingly shows that method of production labelling would be an important tool in driving forward its own animal welfare strategy. Indeed this type of labelling for eggs has resulted in more people buying eggs from cage-free systems each year. In our view consumers deserve to know the truth about where their food comes from so that they can make informed choices when they shop.

This research demonstrates exceptional consumer support for clear, objective method of production labelling.

It also counters earlier research undertaken by the UK's Department of Food and Rural Affairs, which dismissed mandatory food labelling as a means of improving farm animal welfare. Defra's research recorded the opinions of just 96 people but has been disproportionately influential and has been used to argue that method of production labelling is too complicated and that labelling is not a sufficiently important influence on consumer behaviour. Qa's research, on behalf of Labelling Matters, recorded the opinions of thirty-times more consumers than Defra's research. The extensive, representative, consumer research presented here conclusively shows the benefits of method of production labelling.

Clear, honest labelling of meat and dairy produce is critical if the European Commission is to deliver on its ambition of market-driven improvements in farm animal welfare. Method of production labelling is not about telling people what to buy – it's about giving them a straight-forward choice.

References:

1. *Labelling Matters* is a partnership project of Compassion in World Farming, Eurogroup for Animals, RSPCA, and Soil Association: <http://www.labellingmatters.org>
2. Qa is a multi-award-winning independent researcher based in York and London, UK: <http://www.qaresearch.co.uk>
3. Source: Defra: <http://randd.defra.gov.uk/Default.aspx?Menu=Menu&Module=More&Location=None&Completed=0&ProjectID=17379>
4. Method of production labelling of shell eggs was introduced across the EU in 2004. Under the scheme all eggs and egg packaging must be labelled, 0 = Organic, 1 = Free range, 2 = Barn eggs, or 3 = Eggs from caged hens.
5. Eurobarometer 229/2005: http://ec.europa.eu/food/animal/welfare/euro_barometer25_en.pdf
6. Eurobarometer 270/2007: http://ec.europa.eu/public_opinion/archives/ebs/ebs_270_en.pdf
7. The consumer survey was carried out on behalf of Labelling Matters by independent researcher, Qa, to explore attitudes towards method of production labelling amongst the populations of the UK, the Czech Republic, and France. Interviews took place via a commercial access panel provider. The survey took around 15 minutes to complete and tested consumer responses in three areas: 1. Reactions to five potentially misleading meat and dairy labels; 2. Attitudes to method of production labelling of eggs and the appetite for extending them to all meat and dairy products; and 3. Reactions to Labelling Matters' proposed chicken meat labelling terms.
8. Source: Defra.