Shopper Attitudes to Animal Welfare
A Report for Freedom Food by IGD
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Foreword

Despite the economic downturn and dampened consumer confidence over the last few years, interest in ethical shopping and particularly animal welfare, has continued to grow.

There is increasing interest among shoppers in where and how food is produced, particularly for animal derived products, from meat and poultry, to eggs and dairy. As a result, the desire for traceability, clear labelling, and higher standards of animal welfare are moving up shoppers’ agenda.

Freedom Food, the RSPCA’s farm assurance and food labelling scheme, and IGD were delighted to work together in undertaking this research, in an effort to understand better shoppers’ attitudes to animal welfare.

This report aims to inform all stakeholders about shoppers’ attitudes to animal welfare, their perceptions and understanding of Freedom Food, and how they can maximise the opportunities going forward.

Leigh Grant
Chief Executive, Freedom Food

Joanne Denney-Finch OBE
Chief Executive, IGD
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Joanne Denney-Finch OBE
Chief Executive, IGD
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1. Executive summary

1.1 Key findings

Animal welfare is very important to almost half (48%) of British grocery shoppers, when deciding what to buy

• Older shoppers and women are more likely to be influenced by animal welfare considerations when grocery shopping

The trend for higher animal welfare standards has been sustained throughout the economic downturn

• The proportion of shoppers claiming to have specifically bought a product with higher animal welfare credentials has almost doubled over the past four years

Over four in ten (42%) shoppers are aware of Freedom Food

• Awareness is highest among 35-44 year olds, AB shoppers, women, and Sainsbury’s shoppers
• Freedom Food is most widely known for certifying chicken, followed by pork and eggs

Freedom Food is strongly associated with providing assurance of higher animal welfare standards

• Almost nine in ten (86%) of those aware of Freedom Food believe that it represents higher animal welfare standards, far more than the other schemes evaluated
• Most of these associate Freedom Food with higher animal welfare standards generally, irrespective of the farming method (i.e. 73% of all those aware of Freedom Food)
• Over four in five (81%) Freedom Food purchasers are attracted by the higher animal welfare standards that it offers

The RSPCA link is integral to the Freedom Food proposition

• Almost two thirds (63%) buy Freedom Food products because of its association with the RSPCA
• A similar proportion (64%) of Freedom Food buyers completely trust the RSPCA to set the most appropriate welfare standards for farmed animals

Standards that allow animals to display natural behaviour, and that involve independent experts in farm inspections are particularly motivating to shoppers

• 45% of chicken buyers claim they would be prepared to pay extra for welfare standards that cover the whole of the bird’s life, and 40% for assurance that the bird was given enough space to display natural behaviour
• 40% of pork buyers claim they would be prepared to pay extra if pigs had sufficient space to display natural behaviour, and 28% if they had sufficient bedding
• 35% of chicken and pork buyers would be prepared to pay extra for knowing that farm inspections were conducted by independent experts
Lack of in-store visibility is the most common barrier to buying Freedom Food certified products

• Over half (53%) of those aware of Freedom Food claim they don’t buy (more) because they don’t notice Freedom Food options in-store, rising to 71% among 65+ year olds
• In addition, a fifth (20%) of those aware of Freedom Food claim that the products they certify are a little too expensive, with 16% regarding them as far too expensive

Shoppers can be divided into five segments based on their attitude to animal welfare

• Outdoor Essential (10%) – who want a free range equivalent across all categories
• Premium First (23%) – who are more focussed on selecting better quality food, with the common assumption that it will, therefore, have relatively high standards of animal welfare
• Standard Plus (22%) – for whom the space provided to animals is more important than the specific farming system
• Mainly Hens (16%) – who avoid caged hens eggs but are otherwise disengaged with animal welfare when shopping
• Disengaged (29%) – who try not to think too much about meat production, and are less prepared to pay extra for higher welfare standards

1.2 Conclusions and suggested implications

Based on this research, three possible implications have been suggested for Freedom Food, the RSPCA, and supporting organisations, companies and brands to consider.

1. Consider strategies that could help raise awareness of the Freedom Food scheme
2. Consider the potential of targeting the Standard Plus and Premium First shopper segments, as those for whom the Freedom Food proposition may particularly resonate
3. The Mainly Hens shopper segment may represent an interesting group for the RSPCA to target with campaigns regarding the welfare issues associated with other farmed animals
2. Background

2.1 Introduction

Almost half (48%) of British grocery shoppers regard animal welfare as either extremely or very important when choosing what to buy in a supermarket (source: IGD ShopperTrack, June’11). This is higher than for any other aspect of ethical shopping, according to shoppers.

- The importance of animal welfare resonates a little more strongly among certain demographic groups, namely older shoppers (55% among 65+ year olds), and women (52%). However, interest is consistent across all socio-economic groups, with 48% of shoppers in ABC1 and C2DE social grades citing it as extremely or very important.
- IGD ShopperTrack is a monthly monitor of British grocery shopper sentiment, providing insight on what shoppers are doing, why they are doing it, and what they will do in the future. For more information visit www.igd.com/shoppertrack

<table>
<thead>
<tr>
<th>Importance of ethical criteria in product choice</th>
<th>Extremely</th>
<th>Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Welfare of <em>animals</em> involved</td>
<td>21%</td>
<td>48%</td>
</tr>
<tr>
<td>2 Supports <em>local/British</em> producers</td>
<td>18%</td>
<td>45%</td>
</tr>
<tr>
<td>3 How it has been produced</td>
<td>14%</td>
<td>43%</td>
</tr>
<tr>
<td>4 The amount of <em>packaging</em></td>
<td>12%</td>
<td>38%</td>
</tr>
<tr>
<td>5 Where it has been produced</td>
<td>12%</td>
<td>36%</td>
</tr>
<tr>
<td>6 The impact on the <em>environment</em></td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>7 The <em>distance</em> it has travelled</td>
<td>9%</td>
<td>30%</td>
</tr>
<tr>
<td>8 Supports <em>workers</em> in developing nations</td>
<td>6%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: IGD ShopperTrack, base: all main shoppers, fieldwork Jun’11

Having tracked shopper sentiment over many years, IGD research has found that the trend for ethical shopping generally, and higher animal welfare specifically, has largely continued throughout the economic downturn.
Purchasing of higher animal welfare products continues to grow. Following a year of consolidation, the proportion of shoppers who claim to have specifically bought a product with higher animal welfare credentials has increased since the beginning of 2010, almost doubling over the past four years.

The growing pool of higher welfare purchasers has been achieved without any further increase in the proportion of shoppers expressing a concern for animal living conditions, or identifying animal welfare as a key variable impacting their purchase decisions over the last two years. This suggests that shoppers are increasingly acting on their attitudes, converting their concerns into higher welfare choices.

The trend for higher animal welfare has been sustained throughout the economic downturn, and since the heightened media attention surrounding the celebrity chef fronted campaigns in 2006.

- The following chart counts the number of articles in the mainstream British press referring to “animal welfare” every year since 2002
2.2 Research objectives

The objectives of this research were to:

- Understand how animal welfare concerns influence shopping decisions
- Understand shoppers’ perceptions of Freedom Food
- Identify different shopper segments based on their attitude to animal welfare

2.3 Research methodology

The insight for this report was gained through a mix of both quantitative and qualitative research.

The first phase of research involved 18 accompanied shopping trips, among those with some level of interest in animal welfare. Interviews were conducted across a variety of retailers in different parts of the country. The fieldwork was completed between 17 May and 2 June 2010.

This was followed by a detailed online survey among a representative sample of 1,000 British meat shoppers aged 16+. The fieldwork was administered by a leading online panel provider, and was completed between 23 November and 6 December 2010. Details of the questions referred to within this report can be found in the Appendix.

Please note that when talking about shoppers within this report, we are referring specifically to all meat shoppers.
3. What do shoppers understand and think about Freedom Food?

3.1 Awareness of Freedom Food

Over four in ten (42%) meat shoppers are aware of Freedom Food’s name or logo, with almost three in ten (28%) aware of both.

- Awareness of Freedom Food is highest among 35-44 year olds (50%), AB shoppers (50%) and women (48%)
- Awareness is also relatively high among main Sainsbury’s shoppers (55%), reflecting the more extensive range of Freedom Food certified products available in Sainsbury’s

3.2 Understanding of Freedom Food

Higher animal welfare standards

Freedom Food’s association with higher animal welfare standards is well established, among those aware of the scheme. In total, almost nine in ten (86%) of those aware of Freedom Food believe that the label stands for high animal welfare standards.

<table>
<thead>
<tr>
<th>What do shoppers think Freedom Food means?</th>
<th>First mention</th>
<th>All mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Higher welfare, indoors or outdoors</td>
<td>11</td>
<td>58</td>
</tr>
<tr>
<td>2 Free range standards</td>
<td>6</td>
<td>26</td>
</tr>
<tr>
<td>3 Better animal feed</td>
<td>4</td>
<td>23</td>
</tr>
<tr>
<td>4 Outdoors but not nec. free range</td>
<td>3</td>
<td>18</td>
</tr>
<tr>
<td>5 Overseas to British standards</td>
<td>2</td>
<td>17</td>
</tr>
<tr>
<td>6 Reared and produced in Britain</td>
<td>1</td>
<td>17</td>
</tr>
<tr>
<td>7 More natural product</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>8 Hygienic conditions</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>9 Higher quality product</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>10 Better for environment</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>11 Safer product</td>
<td>1</td>
<td>12</td>
</tr>
<tr>
<td>12 Healthier product</td>
<td>1</td>
<td>12</td>
</tr>
<tr>
<td>13 No chemicals</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>14 Better taste or texture</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>15 Organic standards</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>16 Reared and produced locally</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>17 Fresher product</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

Base: All aware of Freedom Food (n=425), 6% don't know
The understanding that Freedom Food represents higher animal welfare standards echoes the spontaneous perceptions gleaned from the accompanied shopping trip participants, who described Freedom Food’s welfare standards with words such as “space”, “looked after”, “happy” and “not caged” for example. Even when familiarity with the scheme was relatively limited, the word “Freedom” and the RSPCA reference were sufficient for shoppers to link the label with animal welfare.

It is more common for shoppers to associate Freedom Food with higher animal welfare standards generally (73%), than with any one particular farming method.

- “It means there are not quite as many fish in the pond, and fewer chickens in the shed.” Lytham, female, mature family, BC1

Some shoppers, however, think that Freedom Food refers specifically to free range production (26%), or to outdoor farming systems more generally (18%).

- Interestingly, it is those who have not knowingly bought a Freedom Food certified product although are aware of the scheme, that are slightly more likely to link it specifically with free range standards, as illustrated in the chart below. This may indicate the starting assumption regarding Freedom Food for some shoppers, before further familiarity with the scheme is gained and the complexity associated with different animal species fully appreciated

- Those who have bought a Freedom Food product, on the other hand, are more likely to associate the scheme with a variety of farming methods, and perceive it to have other benefits, such as being better quality, healthier and more hygienic

<table>
<thead>
<tr>
<th>What they think Freedom Food means</th>
<th>Buyers</th>
<th>Non-buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Higher welfare, indoors or outdoors</strong></td>
<td>80%</td>
<td>70%</td>
</tr>
<tr>
<td><strong>Free range standards</strong></td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Outdoors but not nec. free range</strong></td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Hygienic conditions</strong></td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Higher quality product</strong></td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>Healthier product</strong></td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Organic standards</strong></td>
<td>5%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: Freedom Food buyers (n=150) vs. non-buyers who are aware of FF (n=275), arrows denote significant differences
Based on the qualitative insight, perceptions of the specific welfare standards associated with Freedom Food differ depending on the categories that shoppers associate the scheme with.

- For example, those aware of Freedom Food eggs and pork products are more likely to associate Freedom Food with free range, or outdoor farming systems, while those aware of Freedom Food chicken appear more likely to think of Freedom Food in relation to higher welfare barn or indoor systems.
- We spoke to a few people who were aware of Freedom Food certified salmon. These shoppers tended to assume that Freedom Food salmon were farmed with more space than conventional stocks.
- Among the few aware of Freedom Food duck that we spoke to during the accompanied shopping trip exercise, the common assumption was that the duck had access to open water, even if farmed indoors. Previous IGD research found that 40% of all consumers assume that all duck sold in supermarkets is farmed or reared with access to open water (source: IGD research for the RSPCA, 2009).

**Other perceptions**

On average, those aware of Freedom Food identify the scheme with around three out of seventeen attributes included within the survey. In general, higher animal welfare standards form the primary association with Freedom Food, while other aspects tend to be secondary associations, or perceived as additional or indirect benefits of Freedom Food.

- Almost a quarter (23%) believe that Freedom Food ensures that the animal is given better quality animal feed. Previous IGD shopper research has identified a close relationship between concerns for animal living conditions and concerns about animal feed (source: IGD Shopper Trends 2010, Jan 2010)
- Freedom Food also has some association with Britishness, either for being sourced in Britain (17%), or for being produced to British standards (17%), particularly among 65+ year olds. As evident during the accompanied shopping trips, some shoppers perceive British standards to include higher standards of animal welfare than those of other countries, including other European nations.
- Around one in six (16%) of those aware of Freedom Food believe it means the product is more natural and better quality, and has been produced in more hygienic conditions.

**Compared to other schemes**

Freedom Food is at least twice as likely to be associated with higher animal welfare standards than the other labelling schemes investigated, namely the Red Tractor (Assured Food Standards), LEAF (Linking Environment and Farming) and Organic/Soil Association, when asking those aware of each scheme what they understand it to mean.
While around four in ten (42%) of those aware of the Red Tractor logo associate the scheme with higher animal welfare standards, it is more likely to be understood to mean the food is reared and produced in Britain, or at least to British standards.

- “The Red Tractor is the British farming symbol I believe, meaning they’ve come from British farms.” Harrow, female, mature family, BC1

While the LEAF marque has a strong association with environmental sustainability, around four in ten (38%) of those aware of it also believe it represents higher animal welfare standards.

- “Because it links the environment and farming, I’d hope that it promoted better care for the animals as well.” Leeds, male, pre-family, BC1

Organic food is most commonly understood to mean that production was free of chemicals such as pesticides and hormones. When those aware of organic food were asked to identify what they understood the label to mean, around a fifth (19%) also linked it with higher animal welfare standards.

- “In terms of animal welfare, I would have thought that organic is the same thing as free range.” Leeds, female, young family, BC1

Meat shoppers are more likely to identify Freedom Food as representing the highest standards of animal welfare than they are any of the other labels tested, as illustrated in the following chart.
Freedom Food is followed by the Red Tractor, free range, and organic as representing the highest standards of animal welfare, according to overall shopper perceptions. Organic does, however, rise to second position, behind Freedom Food, among regular organic buyers, with 55% identifying it as a label that guarantees higher animal welfare standards.
3.3 Reasons for buying Freedom Food certified products

Higher standards

The strong association with higher standards of animal welfare is the key reason why shoppers buy Freedom Food certified products.

- In total, over four in five (81%) Freedom Food buyers are attracted by the higher animal welfare standards that it offers.

Why do shoppers buy Freedom Food?

<table>
<thead>
<tr>
<th>All purchasers of Freedom Food meat, fish &amp; dairy</th>
<th>First mention</th>
<th>All mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. High standards of welfare</td>
<td>32%</td>
<td>56%</td>
</tr>
<tr>
<td>2. RSPCA monitors to RSPCA standards</td>
<td>21%</td>
<td>46%</td>
</tr>
<tr>
<td>3. Produced to RSPCA standards of welfare</td>
<td>17%</td>
<td>45%</td>
</tr>
<tr>
<td>4. Tend to source from British farms</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>5. Products can be traced to specific farms</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>6. Certify different production methods</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>7. Products are good quality</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>8. Independent of food &amp; farming industry</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>9. Taste better</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>10. Often not much more expensive</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>11. Fresher</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>12. Just happen to be Freedom Food</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>13. The only option available</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

RSPCA net = 63%
Higher welfare net = 81%

Base: All purchasers of Freedom Food meat, fish & dairy (n=190), 1% other, 6% don’t know

The RSPCA

The RSPCA link is also an integral reason for buying Freedom Food.

- In total, almost two thirds (63%) buy Freedom Food products because of its association with the RSPCA, either because of RSPCA monitoring (46%) and/or because the animals are reared to RSPCA welfare standards (45%)
- Women and more upmarket shoppers (i.e. social grades ABC) are slightly more likely to be drawn to Freedom Food because of the RSPCA’s involvement

For many shoppers, the RSPCA’s involvement adds further credibility to the animal welfare claims of Freedom Food.

- “I’d probably say Freedom Food has the highest standards of animal welfare because of the RSPCA.” Lytham, female, pre-family, C2D
When probed, two thirds (64%) of all Freedom Food buyers completely trust the RSPCA to set the most appropriate welfare standards for farmed animals, with very few disagreeing with this sentiment (15%).

Trust in the RSPCA’s ability to set animal welfare standards is also relatively high among those who are currently not buying or are currently unaware of Freedom Food, with around half agreeing with this sentiment and again relatively few disagreeing. This clearly demonstrates how the link with the RSPCA will be integral for Freedom Food in leveraging the latent demand for higher welfare products.

**Independence**

Freedom Food’s independence from the food and farming industry is another key draw for around a fifth (18%) of Freedom Food purchasers, when looking at the reasons for purchase.
When specifically probed, almost half (46%) of current buyers trust Freedom Food because of its independence from the food industry. This drops somewhat among non-buyers (27%) and those currently unaware of Freedom Food (19%). Relatively few of these shoppers disagree and more than half are unsure. This indicates the importance of driving awareness of and familiarity with the Freedom Food proposition in order to increase shopper engagement with the scheme.

**Other factors**

In fourth and fifth position, British sourcing (32%) and traceability (29%) are two other key reasons that help drive purchases of Freedom Food, although often act as secondary factors.

The fact that Freedom Food certifies different production methods to higher animal welfare standards, including barn/indoor reared and free range, is also a secondary motivator for a quarter (25%) of Freedom Food shoppers.

Positive quality and taste perceptions associated with Freedom Food certified products also act as important secondary purchase drivers among 23% and 18% respectively.
3.4 Reasons for not buying Freedom Food certified products

The most common reason for not buying Freedom Food certified products is that shoppers do not notice these options when shopping, mentioned by over half (53%) of those aware of the scheme.

• While older shoppers are the most engaged with animal welfare issues, they are also the most likely to claim not to notice Freedom Food products in-store (71% among 65+ year olds)

<table>
<thead>
<tr>
<th>Why don’t shoppers buy (more) Freedom Food?</th>
<th>First mention</th>
<th>All mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Don’t notice Freedom Food in-store</td>
<td>34%</td>
<td>53%</td>
</tr>
<tr>
<td>2 A little too expensive</td>
<td>12%</td>
<td>(20%)</td>
</tr>
<tr>
<td>3 My supermarket doesn’t sell any/much</td>
<td>7%</td>
<td>18%</td>
</tr>
<tr>
<td>4 Far too expensive</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>5 Prefer buying British</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>6 Not always reared free range</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>7 Standards of welfare are not high enough</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>8 Other things are more important</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>9 Quality is not high enough</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>10 Other</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: All aware of Freedom Food (n = 425), 11% don’t know

The challenge of maximising visibility of Freedom Food certified alternatives at the fixture was highlighted during some of the accompanied shopping trips. Some participants overlooked the Freedom Food options, despite their interest in animal welfare, due in part to the vast array of products on offer and the limited time they spend at the fixture.

• “I buy (Freedom Food certified) eggs all the time but I’ve not noticed their chicken before, as it’s put with the expensive stuff, and there’s so much to look at.” Watford, male, young family, BC1

At times, shoppers may not notice Freedom Food certified products because they are not available in that particular store, or for that particular category. Almost a fifth (18%) of shoppers cites limited availability as a reason for not buying, or not buying more, Freedom Food certified products.
Price is another fairly common barrier to buying Freedom Food certified products, as stated by shoppers.

- In total, around a third of those aware of Freedom Food claim that certified products are too expensive
- On balance, however, shoppers are slightly more likely to say that Freedom Food products are a little too expensive (20%), than far too expensive (16%)

Price is a key driver of product purchasing decisions, particularly during the current economic climate.

- Nine in ten (91%) shoppers acknowledge price as a key determinant of the grocery items they buy, and a third (33%) are focussing more on saving money when grocery shopping in the year ahead (source: IGD ShopperTrack, June 2011)

Some of the shoppers we spoke to during the accompanied shopping trip exercise were at times surprised at how little the price premium was for buying a Freedom Food certified product compared to the standard options, particularly when assessing barn reared rather than free range or organic examples.

- “The Freedom Food one is only about 10p more than the normal one, so I’ll probably get that in the future.” Watford, male, young family, BC1

For some shoppers, other ethical or sourcing issues are more important to them than animal welfare per se. For example, around one in six (16%) claim not to buy Freedom Food certified products because they prioritise buying British products; although animal welfare may be part of their motivation for buying British. Likewise, around one in seven (14%) are more focussed on buying free range products specifically, rather than looking for higher welfare assurances from schemes such as Freedom Food.
3.5 Freedom Food awareness and purchasing by category

Freedom Food is most strongly associated with chicken.

- Of those aware of Freedom Food, almost a fifth (19%) recall having bought Freedom Food certified chicken, and a further two fifths (38%) have seen the Freedom Food label on chicken but not bought it

<table>
<thead>
<tr>
<th>All aware of Freedom Food</th>
<th>Specifically buy (%)</th>
<th>Aware of</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Chicken</td>
<td>19</td>
<td>57%</td>
</tr>
<tr>
<td>2  Pork</td>
<td>9</td>
<td>46%</td>
</tr>
<tr>
<td>3  Eggs</td>
<td>3</td>
<td>40%</td>
</tr>
<tr>
<td>4  Beef</td>
<td>10</td>
<td>38%</td>
</tr>
<tr>
<td>5  Lamb</td>
<td>9</td>
<td>36%</td>
</tr>
<tr>
<td>6  Turkey</td>
<td>10</td>
<td>29%</td>
</tr>
<tr>
<td>7  Bacon</td>
<td>6</td>
<td>28%</td>
</tr>
<tr>
<td>8  Sausages</td>
<td>5</td>
<td>23%</td>
</tr>
<tr>
<td>9  Salmon</td>
<td>7</td>
<td>23%</td>
</tr>
<tr>
<td>10 Milk</td>
<td>2</td>
<td>22%</td>
</tr>
<tr>
<td>11 Duck</td>
<td>6</td>
<td>16%</td>
</tr>
<tr>
<td>12 Other dairy</td>
<td>2</td>
<td>14%</td>
</tr>
<tr>
<td>13 Other poultry</td>
<td>6</td>
<td>13%</td>
</tr>
<tr>
<td>14 Other fish</td>
<td>8</td>
<td>13%</td>
</tr>
<tr>
<td>15 Other meat</td>
<td>5</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All aware of Freedom Food (n=425)

Awareness is also relatively high for Freedom Food certified pork and eggs.

Awareness of Freedom Food salmon and duck appears relatively low considering the number of certified products available to many shoppers compared to other proteins. This reflects the lower penetration of regular salmon and duck shoppers among the total population, compared with beef and lamb buyers for example.

The relatively high levels of claimed awareness for Freedom Food certified beef and lamb may also indicate a degree of confusion and mistaken identity between Freedom Food and other labelling schemes. However, it also partly mirrors the level of concern that shoppers have towards different animals, with beef cattle the animal type that shoppers are most concerned about after laying hens and chickens.
4. What aspects of animal welfare are shoppers prepared to pay extra for?

There are a myriad of issues and factors that shoppers consider and are influenced by when deciding what products to buy at the supermarket fixture. For animal derived products specifically, such as meat, poultry, fish, eggs and dairy products, these factors include product freshness (e.g. use-by and best-before dates), product appearance (e.g. colour), taste and texture perceptions, provenance and country of origin, fat content (e.g. lean, semi-skimmed), the cut of meat (e.g. joint, skinless, on the bone), and animal welfare, as well as price and promotions.

Buying products certified to higher standards of animal welfare invariably requires shoppers to pay a bit extra compared to conventionally reared products. To further understand shopper motivations, survey respondents were asked to identify what would encourage them to pay a bit extra for products certified to higher animal welfare standards. The questions focussed on the two key product categories of indoor reared chicken, and pork products (including sausages and bacon).

4.1 Aspects prepared to pay extra for – indoor reared chicken

When choosing indoor reared chicken, shoppers are most motivated by the assurance that the higher welfare standards cover the whole of the bird’s life, with almost half (45%) of all chicken buyers claiming they would be prepared to pay a bit extra for this. This is closely followed by assurance that the bird was given enough space to display their natural behaviour (40%), and that farm inspections are conducted by independent experts (35%).
Other aspects, such as natural lighting, no beak trimming, and slower growing breeds, motivate fewer shoppers to pay a bit extra for indoor reared chicken, although at least one in six chicken buyers are motivated by these assurances and are prepared to pay a little extra for this.

- 16-34 year olds are more likely to pay a bit extra for chickens reared in barns with natural light (29%, compared with 22% overall)

Around one in six (17%) shoppers who ever buy chicken claim to be only interested in buying birds that have been reared outdoors, rising to 22% of 45+ year olds. In addition, 13% of shoppers dismiss the idea of paying extra for indoor reared chicken certified to higher standards of animal welfare. The size of this latter group is far fewer than those who do regularly buy conventionally reared chicken, suggesting that many shoppers either assume that standard products already fulfil these criteria, or that all products should meet these conditions at no additional cost to the shopper.
4.2 Aspects prepared to pay extra for – pork products

A similar picture emerges for pork products, with sufficient space for the pigs to display natural behaviour, and farm inspections from independent experts representing the two most motivating animal welfare assurances, with 40% and 35% of pork buyers prepared to pay extra for each respectively. The provision for pigs to display natural behaviour is a key theme for pork shoppers, with almost three in ten (28%) also claiming that they would be prepared to pay extra for the assurance that sufficient straw or bedding was provided to the animals.

Shoppers are somewhat divided on the extent to which pigs bred for pork should be kept outdoors.

- Around a fifth (21%) of shoppers are prepared to pay extra for pork products where the pig was kept outdoors for the whole of its life, rising to 31% among 65+ year olds
- While, almost a quarter (24%) would be prepared to pay a little more for pork products where the pig has spent at least half of their life outside, particularly younger shoppers (34% among 16-24 year olds)

However, relatively few (only 6%) would be prepared to pay extra for pork products that came from pigs that only spent their first few weeks outside. This may indicate an assumption that this already applies to all or most pork products. Within the qualitative research, many shoppers assumed that all pigs were reared outdoors.

- “I’m shocked that pigs could be reared inside – I assumed they were all outdoor reared” Nottingham, female, young family, C2D
Pork products labelled as ‘outdoor reared’ refers to pigs that spent at least half of their life outside, while those labelled ‘outdoor bred’ refers to pigs that were born and spent their first few weeks outdoors. There is little evidence, based on the accompanied shopping trip respondents that we spoke to, that shoppers correctly understand these terms or that they make any distinction between the two.

- “To me bred and reared mean the same thing.” Leeds, male, pre-family, BC1

Other aspects of pork production, such as sow stalls, tail and teeth trimming, and castration, are less likely to justify a price premium, according to shoppers. This may indicate a lower level of awareness with these issues, or the expectation that all pork products should meet these criteria regardless.
5. How do shoppers segment into different groups?

5.1 Behavioural approach

One way of dividing the shopper population is based on their current behaviour, and the extent to which they claim to buy products with higher animal welfare standards. For example, the accompanied shopping trip respondents spread across three camps based on the number of categories for which they buy higher animal welfare options.

Segmenting shoppers based on behaviour

Eggs-clusive
- Only buys higher welfare options for eggs

Plus Poultry (or Pork)
- Buys higher welfare eggs plus chicken
- Or eggs plus pork/bacon...
- Has blind spots - welfare is not considered for some relevant categories

Wholly Welfare
- Welfare is a key driver across all relevant categories
- Proactively chooses higher welfare options
- Includes a mix of organic, free range, Freedom Food, outdoor or abstinence

Eggs-clusive

These shoppers only consider higher animal welfare standards when shopping for eggs. They are committed to buying barn or free range eggs, but rarely think about higher welfare options when shopping for meat or fish, or when buying composite products such as mayonnaise or ready meals for example.

- “I don’t buy caged eggs. I don’t know why – I just think it’s a bit cruel really.” Leeds, female, mature family, C2D

Plus Poultry (or Pork)

In addition to eggs, these shoppers are engaged with higher animal welfare standards when buying chicken or pork products such as pork chops, bacon and sausages. However, consideration of higher welfare options within other protein categories among these shoppers is rare.
Wholly Welfare

The most engaged shoppers are those who proactively choose higher welfare options across a wide range of relevant categories. This group includes those with the most sophisticated understanding of and approach to animal welfare, with some prioritising different criteria depending on the product type. For example, one shopper we interviewed buys organic beef, free range eggs, indoor reared chicken, outdoor reared pork and British bacon, and also abstains from eating lamb on animal welfare grounds.

5.2 Shopper attitudes to animal welfare

Alternatively, shoppers can be segmented on the basis of their attitudes to animal welfare. The research identified and assessed a range of different attitudinal dispositions. These metrics then formed the building blocks for identifying mutually exclusive shopper segments. This sub-section highlights a few examples of the individual attitudes tested within the survey, as a prelude to a discussion of the attitudinal segmentation solution.

<table>
<thead>
<tr>
<th>Shopper attitudes to animal welfare</th>
<th>Tend to disagree</th>
<th>Disagree strongly</th>
<th>Agree strongly</th>
<th>Tend to agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free range is the minimum standard of animal welfare that I’m prepared to buy</td>
<td>15% 4 15</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The animal living conditions are more important than whether it is reared indoors or outdoors</td>
<td>8% 2 16</td>
<td>61%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I expect the products I buy to have high standards of animal welfare without me having to check</td>
<td>9% 1 25</td>
<td>68%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All British foods are produced to acceptable standards of animal welfare</td>
<td>34% 9 6</td>
<td>27%</td>
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</table>

Half (49%) of shoppers regard free range as the minimum standard of animal welfare that they are prepared to buy, while 15% disagree with this position and 36% do not have an opinion. The general starting position for many shoppers, therefore, is that farm animals should have access to roam outside. Around one in seven (15%) are particularly firm in this conviction, although a third (34%) of shoppers sway towards this position, perhaps recognising some exceptions to this general rule.

Three fifths (61%) of shoppers regard living conditions as more important than whether the animal is reared indoors or outdoors. Again, however, many of these (45%) express a tendency toward this position rather than a dogmatic opinion.
Almost seven in ten (68%) shoppers expect the products that they buy to have high standards of animal welfare, without them having to check that this is the case. As with other aspects of ethical shopping, shoppers ideally want food and grocery companies to ensure that all available products meet their ethical criteria. The difficulty, however, as indicated by the two previous attitudinal statements, is that shoppers set different minimum, acceptable standards.

Shoppers are divided on their perception of the animal welfare standards associated with foods sourced from Britain. Around a quarter (27%) of shoppers believe that all British foods are produced to acceptable standards of animal welfare, while a third (34%) disagree, and almost four in ten (39%) are unsure.

### 5.3 Attitudinal shopper segmentation

Based on a full appraisal of shoppers’ attitudes to animal welfare, utilising eighteen individual statements, five mutually exclusive shopper segments have been identified, sized and profiled. The chart below introduces each of these segments, with their name, the penetration with which they exist among the total British shopper population, and the core essence of their attitudinal position towards animal welfare.

<table>
<thead>
<tr>
<th>Segmenting shoppers based on attitude</th>
<th>Outdoor Essential (10%)</th>
<th>Premium First (23%)</th>
<th>Standard Plus (22%)</th>
<th>Mainly Hens (16%)</th>
<th>Disengaged (29%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Want a free range equivalent across all categories</td>
<td></td>
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<tr>
<td></td>
<td>• Freedom Food standards can be perceived to be too low</td>
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<td></td>
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<tr>
<td></td>
<td>• Quality comes before welfare</td>
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<tr>
<td></td>
<td>• Some buy the higher welfare options by default</td>
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<td></td>
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<tr>
<td></td>
<td>• Space rather than the farming system is important</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Drawn to ‘standard plus’ private label branding and pricing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• High awareness and strong perception of Freedom Food</td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td>• Avoid caged hens eggs</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Otherwise disengaged with other aspects of welfare</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Try not to think too much about meat production</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Not prepared to pay extra for higher welfare standards</td>
<td></td>
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</tr>
</tbody>
</table>

Two of the key differentiating variables between these groups are their level of engagement with animal welfare, and the degree to which they focus on quality when buying food. The chart below positions the five segments based on their relative relationship to these two dimensions.
5.4 Outdoor Essential

The Outdoor Essential group, representing one in ten meat shoppers (10%), are very engaged with animal welfare issues related to food production, with a relatively strong insistence that all farm animals are reared in environments that provide them with outdoor access.

- “I’d reject barn reared as well as caged. It has to be free range for me, and then I don’t have to think about it.” Nottingham, female, young family, C2D

Animal welfare concerns are often only one of the ethical aspects that the Outdoor Essential shoppers are interested in. They are also focussed more strongly on food quality, hence a higher propensity to buy organic products, read food related magazines, and come from high socio-economic backgrounds.

Familiarity with Freedom Food is relatively strong among this segment; however, because of their free range focus, they are more likely to question Freedom Food’s certification of animal products farmed in indoor systems.

- “Freedom Food is not something I’d go for unless it’s free range, but it could suit a lot of other people.” Harrow, female, pre-family, BC1
The chart above provides further detail regarding the attitudes of the Outdoor Essential segment, their shopping behaviour, awareness and perception of Freedom Food, demographic profile and media consumption.

### 5.5 Premium First

Approaching a quarter (23%) of meat shoppers fall into the Premium First group. They are more focussed on selecting better quality food than they are engaged with animal welfare issues specifically. The common assumption among these shoppers, however, is that by buying more premium products, the animal welfare standards are relatively high. Premium First shoppers are, therefore, more likely than the average grocery shopper to buy food produced to higher animal welfare standards, including those certified by Freedom Food, although sometimes by default rather than proactively.

- “I like the (premium private label) bacon because it is better quality meat, and I’d automatically think it would therefore be reared better.” Leeds, female, young family, BC1

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**Outdoor Essential (10%) – pen portrait**

- They insist on outdoor reared or free range across all species, for welfare reasons
  - 81% say it’s essential that all animal derived products are reared outdoors
- Purchase decisions are driven strongly by ethical issues, including welfare, organic and environmental sustainability
- High levels of awareness (53%) and purchase (44%) of Freedom Food, and other food labels (e.g. organic, free range, LEAF)
- But more likely to question whether Freedom Food standards are high enough on indoor systems
  - 59% question FF certified indoor reared chicken and 51% barn eggs
- They are the most female group (72%), and slightly younger and upmarket than average
  - More likely to shop at Ocado (10%) and The co-operative (53%)
- High readership of foodie magazines (e.g. Olive, Delicious) and mid-market newspapers (e.g. Daily Express)

Base: all meat shoppers
Shopper attitudes to animal welfare

Premium First (23%) – pen portrait

- They focus on buying high quality products and expect them to have high standards of animal welfare (79%)
  - 84% don’t check the standards as they assume they’re okay
  - Buying the premium range or from certain stores provides many of them with sufficient welfare assurance
- Organic is a more frequent consideration, particularly for poultry (19%) and red meat (16%)
- Awareness of Freedom Food is average (45%)
- They’re a bit more likely to associate Freedom Food with free range and trust the RSPCA to set appropriate standards
- Slightly older and upmarket in profile
  - More likely to shop at Sainsbury’s (61%) and M&S (51%)
- High readership of broadsheet newspapers (e.g. Financial Times, The Times)
  - More likely to watch the news and listen to classical music (e.g. Classic FM)
  - More likely to read BBC Good Food, The National Trust and Hello! magazines

When noticed, Freedom Food certification can provide some additional confirmation of the animal welfare assumptions associated with premium positioned products among Premium First shoppers, particularly given their strong trust in the RSPCA to set appropriate standards.

- “I’ve never noticed that (Freedom Food) logo before. That definitely confirms it’s been treated better, so I’ll look for that in the future.” Leeds, female, young family, BC1

The more upmarket and older profile of Premium First shoppers reflects their quality focus.

5.6 Standard Plus

Standard Plus shoppers, representing 22% of all meat shoppers, are so called because higher animal welfare standards are important to them, but they are less demanding of an outdoor or free range farming system to deliver that. Indoor reared Freedom Food certified products are, therefore, particularly appealing to them. Many Standard Plus shoppers are already buying some higher welfare product lines across a variety of categories, often with an aspiration to switch more of their purchases to these options, although price perceptions can be a barrier.
Shopper attitudes to animal welfare

**Standard Plus (22%) – pen portrait**

- They want **higher welfare** standards across all species, but **without the price** premium of free range
  - 77% are happy to pay a bit extra for certified **indoor** reared meat and dairy
  - 61% want to know that the animal had **enough space**
  - Many are optimistic in **assuming** that the welfare is okay
- They are the most positive toward **certified indoor** farming systems for eggs and chicken
- High **awareness** (55%) and strongest **perception** of FF
  - Including **traceability** reassurance and **trust** in independence
- High propensity to buy higher welfare products
  - Including Freedom Food poultry and pork, free range, and barn reared eggs and poultry
- They are from a **broad social spectrum**, although slightly **younger** in profile and more likely to shop at **Sainsbury’s**
- High readership of popular newspaper titles (e.g. The Sun) and **women’s** magazines (e.g. Take a Break, Cosmopolitan)
  - They are also more likely to read Heat and Sky magazines

Base: all Standard Plus (n=209)

The Standard Plus segment have a higher than average awareness and perception of Freedom Food. They are from all walks of life, although tend to be a little younger than average.

### 5.7 Mainly Hens

The animal welfare concerns of the Mainly Hens segment (16%) are almost solely focussed on battery or caged hens, and so tend to buy free range or barn reared eggs. Their current engagement with other aspects of animal welfare is limited, and there is rarely an immediate aspiration to extend higher welfare purchasing to other categories.

- “It’s (animal welfare) too much to think about when you’re trying to get your shopping out of the way.” Leeds, female, mature family, C2D
Mainly Hens (16%) – pen portrait

- Battery or caged hens is the one big animal welfare concern that they have (87%)
  - Many also want to know that the animal has had a happy life (66%), with sufficient space (49%)
  - Many claim that welfare is quite important when choosing meat and poultry (54%)
- High purchase penetration for free range (59%) and barn reared eggs (14%) only
- Average level of awareness for Freedom Food (42%)
  - Although, less aware of Freedom Food outside of eggs and chicken
- Most likely to associate Freedom Food with British sourcing and slightly higher levels of trust in the scheme
- They are from a broad social spectrum, although slightly older in profile
- High readership of broadsheet newspapers (e.g. The Independent, The Sunday Post) and watchers of news programmes
  - They are also more likely to read Vogue and Gardeners’ World magazines

Base: all Mainly Hens (n=167)

While a little older in profile when compared to other segments, Mainly Hens shoppers are from a relatively broad socio-economic spectrum.

5.8 Disengaged

Almost three in ten (29%) meat shoppers fall within the Disengaged group, who tend not to think about the animals involved in the production of food, even though they may express a love for animals. These shoppers are particularly focussed on factors such as price, promotions and freshness, rather than higher animal welfare standards, thus explaining their low awareness and limited understanding of Freedom Food.
Shopper attitudes to animal welfare

**Disengaged (29%) – pen portrait**

- They *don’t think* about where meat and dairy products come from (64%), although include some self-confessed *animal lovers*
  - Relatively few are even interested in knowing how much space animals have to move around (22%)
  - Very few are prepared to pay even a little bit extra for higher welfare indoor systems (13%)
- *Price, promotions* and *use-by dates* are strong drivers of purchase decisions, with welfare low on the list
  - Hence low purchase penetration for labels, including Red Tractor, Freedom Food and free range
- *Low* awareness and *weaker* perception of Freedom Food
- *Ambivalent* to Freedom Food barn systems
- They are the most ‘*downmarket*’ group and slightly *younger* than average
  - More likely to shop at *Tesco*
- High readership of *tabloid* papers and magazines (e.g. The Sun, The Mirror, What’s on TV)

Base: all Disengaged (n=289)

Disengaged shoppers over-index among the lower social grades.
6. Conclusions and suggested implications

Based on this research, three possible implications have been suggested for Freedom Food, the RSPCA, and supporting organisations, companies and brands to consider.

1. Consider strategies that could help raise awareness of the Freedom Food scheme

2. Consider the potential of targeting the Standard Plus and Premium First shopper segments, as those for whom the Freedom Food proposition may particularly resonate

3. The Mainly Hens shopper segment may represent an interesting group for the RSPCA to target with campaigns regarding the welfare issues associated with other farmed animals

Each of these is discussed below in further detail.

6.1 Consider how to raise awareness of Freedom Food

While awareness of Freedom Food has grown considerably over recent years, already reaching over four in ten shoppers, many others are yet to be familiar with the scheme, including those within key shopper segments. Once aware of Freedom Food, shoppers generally have a clear understanding and strong perception of the higher animal welfare standards associated with it. The link with the RSPCA is an integral element of this. One possible priority, therefore, could be to focus on increasing awareness of Freedom Food.

In addition to considering a national advertising campaign, awareness could be increased by highlighting the existence of Freedom Food in-store. At times, shoppers do not notice the Freedom Food options currently available. Further point-of-sale marketing and information, both on-pack and surrounding the fixture, could help to support this objective.
6.2 Consider targeting Freedom Food at Standard Plus and Premium First segments

The Standard Plus shopper segment is an attractive group for Freedom Food to consider targeting, for the following reasons:

• They represent over a fifth (22%) of all British meat shoppers
• They are more engaged with animal welfare issues when shopping for food and groceries, compared to many other shoppers
• They are the most positive about indoor reared products certified to higher animal welfare standards, with three quarters (77%) of them claiming to be prepared to pay a little extra for them
• Awareness of Freedom Food is already relatively high and perceptions of the scheme strong, although they are not always aware of the full extent of the range

As a secondary target group, the Premium First segment may also be particularly attractive to Freedom Food, for the following reasons:

• They also represent over a fifth (23%) of all British meat shoppers
• They already demonstrate a willingness to pay a bit extra for animal derived products, and are purchasing some higher welfare options by default
• Freedom Food certification could provide Premium First shoppers with a simple way of satisfying their broad interest in animal welfare, when assessing which of the more premium lines to purchase

Outdoor Essential shoppers are also an attractive group for Freedom Food; however, many are already buying into higher welfare options, particularly free range, outdoor reared and organic.

6.3 Consider targeting the Mainly Hens segment with RSPCA welfare campaigns

The Mainly Hens group have some interest in animal welfare, and have already responded to campaigns highlighting the poor welfare conditions of battery hens. On this evidence, the Mainly Hens group may respond similarly once made aware of the welfare issues surrounding other species. This group could, therefore, be specifically targeted with campaigns that aim to broaden shoppers understanding of and engagement with welfare issues regarding farmed animals.

For example, many shoppers assume that pork products tend to come from pigs that have outdoor access throughout their life. Campaigns that challenge these assumptions may help trigger shoppers along the spectrum of shopper segments to those more strongly engaged with animal welfare when grocery shopping.
7. Appendix

7.1 Qualitative research methodology

Qualitative insight was gained through an initial series of 18 accompanied shopping trips, each lasting up to one hour, and moderated by an IGD shopper insight manager. The recruitment criteria were as follows:

- All respondents were mainly or jointly responsible for the household’s grocery shopping
- Half had a strong interest in the welfare of animals involved in the production of food, and half had some interest
- They included a mix of gender, life-stage and social grades
- Interviews were conducted in a variety of grocery retailers, and across various parts of the country, including the south, midlands, north west, and north east

All qualitative research was conducted between 17 May and 2 June 2010.

7.2 Quantitative research methodology

Detailed shopper insight was gained through quantitative interviews with a representative sample of 1,000 British meat shoppers aged 16+. This involved an extensive online survey, administered by a leading online access panel provider.

The quantitative research was conducted between 23 November and 6 December 2010. The specific questions referred to within this summary report are included in the following section, for reference.

7.3 Questionnaire

Q1. Which of these statements BEST describes what you think this food label (Freedom Food) means? And which other statements also describe what it means, if any?

1. It has been produced to organic standards
2. It has been produced to free range standards
3. It has been produced outdoors but not necessarily to free range standards
4. It has been produced to higher standards of animal welfare, either indoors or outdoors
5. The methods used in production are better for the environment
6. Better quality animal feed has been used in production
7. No chemicals have been used in production, e.g. pesticides and hormones
8. It has been locally reared and produced
9. It has been reared and produced in Britain
10. It has been reared and produced to British standards, even if in another country
11. It has been produced in more hygienic conditions
12. The product is more natural
13. The product is higher quality
14. The product is fresher
15. The product has a better taste or texture
16. The product is healthier
17. The product is safer
18. Other

Q2. Which ONE of these food labels do you think represents the HIGHEST standards of animal welfare? And which others also guarantee HIGHER standards of animal welfare, if any?
1. Assured Food Standards
2. Barn reared
3. Free range
4. Freedom Food
5. Leaf – Linking Environment and Farming
6. Organic/Soil Association
7. None of these
8. Don’t know

Q3. Please indicate whether you specifically buy products with the Freedom Food label nowadays, and if so for which products.
1. I don’t specifically buy anything with that label
2. Chicken
3. Turkey
4. Duck
5. Other poultry (e.g. goose)
6. Pork
7. Bacon
8. Sausages
9. Lamb
10. Beef
11. Other meat (e.g. veal)
12. Salmon
13. Other fish
14. Eggs
15. Milk
16. Other dairy products (e.g. butter, cheese and yoghurt)
17. Fruit and vegetables
18. Bread
19. Other
Q4. Please indicate the extent to which you agree or disagree with each of the following statements that others have said in relation to animal derived food products, including meat, fish and poultry, eggs and dairy products.

a. It is essential that all animal derived products, including all types of meat and poultry are reared outdoors
b. I focus on buying high quality products and expect them to have high standards of animal welfare
c. I expect the products I buy to have high standards of animal welfare without me having to check
d. I’m happy to pay a bit extra for indoor reared meat and dairy products that guarantee higher animal welfare standards
e. I love animals but try not to think too much about where meat and dairy products come from
f. Battery or caged hens is the one big animal welfare concern that I have
g. Free range is the minimum standard of animal welfare that I’m prepared to buy
h. As long as I buy from the premium range, I’m sure the animal welfare standards will be acceptable
i. The animal living conditions are more important than whether it is reared indoors or outdoors
j. I only want to buy indoor reared animal products if I know they have had lots of space to move around
k. Ideally I’d like to buy meat that has higher animal welfare standards than the standard supermarket own brand but are not as expensive as free range
l. I have serious animal welfare concerns about all indoor reared meat and poultry products
m. All I want to know is that the animal had a happy life
n. The stores I use do not stock products with poor animal welfare standards
o. All British foods are produced to acceptable standards of animal welfare
p. I prefer it when products are called by their meat name (e.g. pork, beef) rather than the animal species it came from (e.g. pig, cow, lamb)
q. I prefer drawings rather than photos of the animal on product packaging
r. I don’t like the idea of eating cute, fluffy animals such as lambs

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don’t know
Q5. Overall, which ONE of these statements BEST applies to you? Again, there is no right or wrong answer; it is your personal opinion that we are interested in.

1. It is essential that all animal derived products, including all types of meat and poultry are reared outdoors
2. I focus on buying high quality products and expect them to have high standards of animal welfare
3. I’m happy to pay a bit extra for indoor reared meat and dairy products that guarantee higher animal welfare standards
4. I love animals but try not to think too much about where meat and dairy products come from
5. Battery or caged hens is the one big animal welfare concern that I have
6. None of these
7. Don’t know

Q6. Which of these guarantees, if any, would encourage you to pay a bit extra for indoor reared chicken that was certified to higher animal welfare standards?

1. The barn has natural light
2. The chickens have enough space to display natural behaviour
3. They are a slower growing breed and so less prone to illness and defects
4. Their beaks are not trimmed
5. The welfare standards cover the bird’s whole life – from hatching to slaughter
6. The farms are inspected by independent experts
7. None of these – as this already happens as standard
8. None of these – as it’s not something I think about
9. None of these – as it’s not terribly important to me
10. None of these – as I think chickens should always be reared outdoors
11. Don’t know
Q7. Which of these guarantees, if any, would encourage you to pay a bit extra for pork, bacon or sausages that was certified to higher animal welfare standards?

1. They were born and spent the first few weeks of their life outside
2. They spent at least half of their life outside
3. They had enough space to display natural behaviour
4. They had enough straw or bedding to display natural behaviour
5. Their tails and teeth are not trimmed
6. The male pigs are not castrated
7. The sows (or mother pigs) are not kept in individual stalls or cages
8. The farms are inspected by independent experts
9. None of these – as this already happens as standard
10. None of these – as it’s not something I think about
11. None of these – as it’s not terribly important to me
12. None of these – as I think pigs should have outdoor access for their whole life
13. Don’t know

Q8. On what types of products have you seen the Freedom Food label, if any?

1. Chicken
2. Turkey
3. Duck
4. Other poultry (e.g. goose)
5. Pork
6. Bacon
7. Sausages
8. Lamb
9. Beef
10. Other meat (e.g. veal)
11. Salmon
12. Other fish
13. Eggs
14. Milk
15. Other dairy products (e.g. butter, cheese and yoghurt)
16. Other
17. None of these
Q9. Why do you buy Freedom Food products? Please indicate your ONE main reason followed by any other key reasons.

1. They have high standards of animal welfare
2. They have been produced to RSPCA standards of animal welfare
3. The RSPCA monitors that they have been produced to RSPCA standards of animal welfare
4. They certify different production methods, including barn/indoor reared and free range
5. The products can be traced to specific farms
6. They are independent from the food and farming industry
7. They tend to source from British farms
8. They are often not that much more expensive than the standard products
9. The products are good quality
10. They taste better
11. They are fresher
12. They are the only option available in my supermarket
13. They just happen to have the Freedom Food label – I buy them for other reasons
14. Other (please specify)
15. Don’t know

Q10. Why don’t you buy (more) Freedom Food certified products (on more products)? Please indicate your ONE main reason followed by any other key reasons.

1. The standards of animal welfare are not high enough
2. The animals are not always reared to free range standards
3. I prefer buying British
4. They are a little too expensive
5. They are far too expensive
6. The quality is not high enough for me
7. I don’t notice the Freedom food options in store
8. My supermarket doesn’t sell any/much Freedom Food
9. Other things are more important to me than animal welfare
10. Other (please specify)
11. Don’t know
Q11. Please indicate the extent to which you agree or disagree with each of the following statements that others have said about Freedom Food. It is your personal opinion that we are interested in.

a. I completely trust Freedom Food because it is independent from the food and farming industry
b. I completely trust the RSPCA to set the most appropriate animal welfare standards for farmed animals

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don’t know