

## Report No. 2: Swedish Consumers' Views on Farm Animal Welfare

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## Introduction to Part I and Part II

This report explores the attitudes and practices of Swedish consumers regarding farm animal welfare. It is presented in two parts representing the two different methodologies used: qualitative focus groups informing the development of quantitative surveys. The focus groups are not representative, but rather were chosen in order to explore the diversity and breadth of attitudes concerning animal welfare in Swedish society among different groups. Analysis of the focus groups was used to develop the quantitative surveys. This quantitative data is representative and offers a general idea of what Swedish consumers as a whole believe is important, are concerned about, and their consumption habits. Together the two parts give a general picture of consumers' attitudes and actions, as well as begin to explore various motivations and beliefs underlying these.

The report is a summary of information concerning Swedish consumers' attitudes and practices in terms of animal welfare presented in the Welfare Quality Reports. The quantitative survey data is from Welfare Quality Reports No. 2 Part IV and the qualitative focus group data is from Welfare Quality Reports No. 4 Part V (Kjærnes et al, 2007, p. 127-154; Evans & Miele, 2007, p. 205-252).

## PART I - Qualitative Focus Group Data on Consumers' Views

### 1 Introduction

The aim of this section is to examine consumers' attitudes toward animal welfare their appreciation of animal based welfare quality systems. This section presents a summary of the findings of the Swedish focus group study conducted by the Welfare Quality project as reported in Welfare Quality Report No. 4 in the chapter on Sweden (Evans & Miele, 2007). The original aim of the study was to gain a better understanding of different attitudes toward animal welfare found among Swedish consumers; the focus is explorative in that it attempts to identify the range of opinions and perspectives.

#### 1.1 Methodology

Seven semi-structured focus groups were conducted, each lasting about two hours and consisting of six to eight people. Each focus group was internally homogeneous, but with variation between groups. The various groups were selected in order to represent different spheres of society (see Table 1).

Table 1: Composition of focus groups

Group NO.	Description of group	Date for interview	The interview location	Number of participants
1	Urban mothers	050216	Gothenburg	8
2	Rural women	050303	Rättvik	7
3	Married/partners without children	050217	Gothenburg	8
4	Seniors 55-65 years old	050222	Stockholm	6
5	Young singles 18-35 years old	050310	Stockholm	7
6	Politically active and	050310	Stockholm	6

	vegetarians			
7	Politically active as well as fathers	050428	Stockholm	6

Source: Evans & Miele, 2007

Several issues were identified in the composition of the focus groups. Participants tended to be well educated. In the politically active fathers group only one person ate meat, thus the view of politically active meat eaters is limited. In addition, it was immigrants and Swedes with at least one parent born in another country were underrepresented in the study.

## 2 Attitudes eating & preparing food

In general, participants eat breakfast, lunch, and dinner. Some participants skip breakfast due to lack of time. Lunch is usually eaten outside the home at a restaurant or lunchbox at work. The regular practice is to have dinner at home and they cooked the food themselves.

Preparing meals was generally seen as either an enjoyable experience or chore that needed to be done. Those enjoying cooking tended to be people living together without children or seniors, but it was expressed by other individuals as well.

The view of cooking as something that must be done daily was the strongly dominant perspective. This was especially true of the urban mother and young single groups. Also, participants with children or living alone tended to not enjoy cooking very much. Feelings about cooking were clearly connected with amount of spare time, age, and marital status.

## 3 Buying animal food products

### 3.1 Supermarkets

All participants did their main grocery shopping in supermarkets and usually buying meat, eggs, and dairy products at the same supermarket as they buy the rest of the food. Supermarkets were chosen most often on the basis of convenient location, but secondarily on good or low prices.

The five main supermarket chains are: Konsum (Coop), Vivo (Vi), Hemköp, Ica (Ica Kvantum) and Willys. Netto and Lidl were also mentioned, but were used by fewer participants and usually only under particular circumstances. Willys, Netto and Lidl have been established quite recently compared to the other four major supermarket chains.

Oftentimes participants do their main shopping at one location and then buy fresh commodities or smaller items at a closer store. This pattern differs in rural areas, where there may be few options located relatively close to each other.

Some people had specific reasons for choosing a particular supermarket. For example, several politically active fathers preferred shopping at Konsum for their staff policy or ecological concerns.

Participants expressed skepticism toward the newer supermarket chains. People who shopped at Netto or Lidl were usually not pleased with the store and criticized it. Participants usually

gave an excuse for shopping at these stores. Willys' reputation was not as bad and the shoppers seemed more pleased with the company.

A few participants shop in market-halls, but only for special occasions and not frequently.

There was only one participant who purchased meat from a butcher. However, skilled supermarket butchers are also appreciated.

### *3.2 Buying from farmers*

It is desirable to buy products directly from farmers, but it was only done by those who had easy access to a farm. Eggs are the only product that can be bought directly from farmers and many participants talked about the superior taste of these eggs. However, only those living close to a farm or in the countryside had easy enough access to buy such eggs.

Similar things were said of meat from hunted animals; it was believed to be tastier and healthier than other meat. Once again, it was difficult for participants to get a hold of.

### *3.3 Swedish products*

The perception of Swedish products as better than foreign was a complicated issue. Although participants dismissed the idea as 'ridiculous', they nevertheless preferred to purchase Swedish meat.

The issue of Swedish animal welfare standards being better than those of other places was very controversial in the seniors group.

The discussion about 'Swedish' products may indicate that country of origin is related to ideas of identity.

### *3.4 Price*

All groups agreed that price is an important factor in buying decisions. However, price is not necessarily the deciding factor compared to country of origin for example.

Other considerations included ecological production, expiration date, and look of the meat.

## **4 Knowledge & understanding of animal welfare**

The level of knowledge about animal welfare is generally low among participants. No one knew what the conditions for animals were like exactly, but it was assumed that conditions would be bad.

### *4.1 Consumer definition of animal welfare*

When asked to define animal welfare as it relates to the food industry many participants said it does not exist. This opinion was expressed in many groups, not just in vegetarian and politically active groups. Transport problems were brought up in all but one focus group.

The concept of farms as factories exploiting animals without consideration was also brought up often.

Interestingly, negative perceptions were almost always based on second hand information. Those participants who had actually been to experience farms for themselves through visits or acquaintances generally had a much more positive view about how the animals are treated.

When presented with the Welfare Quality project's experts' list of ten animal welfare concerns (this list later developed into the 12 animal welfare criteria) the participants generally were quite positive agreeing that it was both important and relevant. However, there was a range of opinion expressed from stating the list was wishful thinking, thinking the list was only on the right track, believing the list comprehensive, and expressing concern that these issues were not already taken for granted. Generally participants were supportive and there was a high level of trust in scientists who put together the experts' list.

Focus group definitions of animal welfare correlated closely with the experts' list. However, participants included outdoor access, worried about GMO, and were concerned about the scale of farming. In addition, participant lists tended to list positive aspects of animal welfare whereas experts' list relied on negative aspects (aspects to be avoided). Also, participants tended to see animal welfare issues in a wider context of production processes, economic constraint, and political/institutional levels.

## **5 Perception of animal welfare products**

### *5.1 Animal welfare friendly brands*

There are few brands in Sweden that market themselves as animal friendly. The best known brand among participants was the ecological label KRAV. Ugglarp, Bosarp, Naturkött, and Änglamark also explicitly include animal welfare. The first two of these brands were not well known, only one politically active participant with a special interest in animal welfare had even heard of Bosarp. Naturkött was better known; some participants had bought their products and had seen it before in stores. Änglamark is a Konsum ecological brand which includes several non-animal products, which may in part explain people's familiarity with the brand.

Ecological products are seen as animal friendly. For participants, the concept of ecological includes environmental concerns, animal welfare matters, and health aspects.

### *5.2 Eggs*

All groups focused specifically on eggs and the condition of hens. However, there was confusion among the groups about which eggs would be best to buy if you're concerned about animal welfare. People disagree about the best animal friendly eggs with some believing free-range eggs, others ecological free-range, or just KRAV label as the best. There was also general confusion about existing packaging and labels.

The majority of participants claimed to take animal welfare into consideration when choosing eggs. Participants who believed they bought animal friendly products generally paid more for the product and cited caring for hens as a strong motivation for their purchase.

### 5.3 Health of animal friendly products

This emphasizes the finding that animal welfare products are seen as a healthier alternative. It was believed that decently treated animals make healthier products. Others believed that health aspects were a reason for not buying animal welfare-friendly products, such as when low fat alternatives were not offered within the animal friendly product range.

### 5.4 Price

Participants were divided on whether or not they were willing to pay extra for animal-friendly products and if they thought animal-friendly eggs were too expensive. Even among those who were willing to pay extra, price sometimes became an obstacle to choosing animal-friendly.

## PART II - Quantitative Survey Data on Consumers' Views

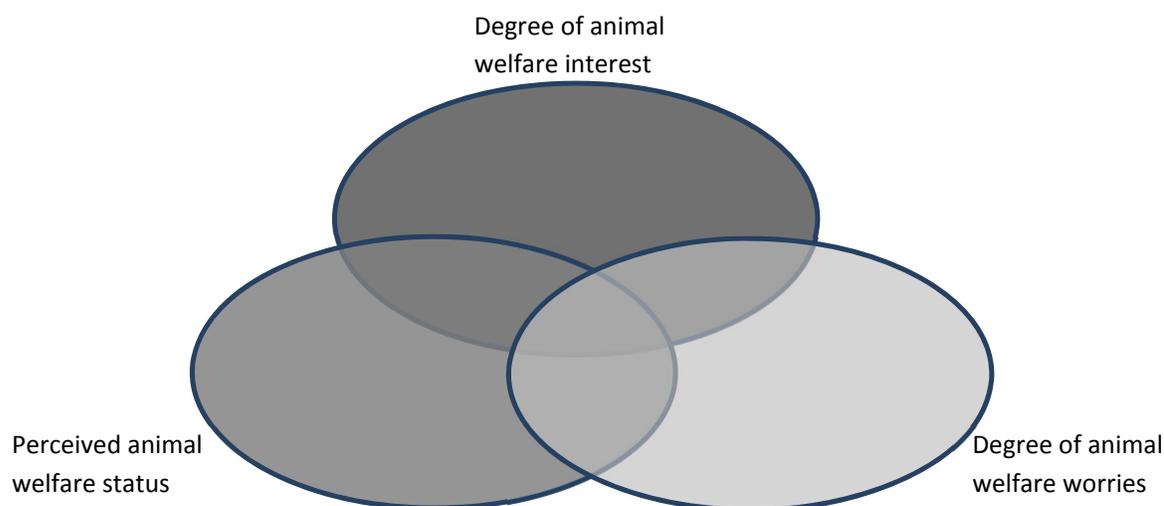
### 1 Introduction

This chapter investigates consumer attitudes and practices related to animal welfare, particularly focusing on the relationship between public opinion of farm animal welfare and purchasing practices. Data for this chapter comes from the EU's Welfare Quality survey of 1,500 respondents in Sweden.<sup>1</sup>

### 2 Attitudes of consumers toward animal welfare

Public opinion of farm animal welfare can be conceptualized in three dimensions: degree of animal welfare interest, perceived animal welfare status, and degree of animal welfare worries. These dimensions may be correlated, but not entirely overlapping although changes to one often affect the others.

Figure 1: Illustration of different dimensions of public opinion about farm animal welfare

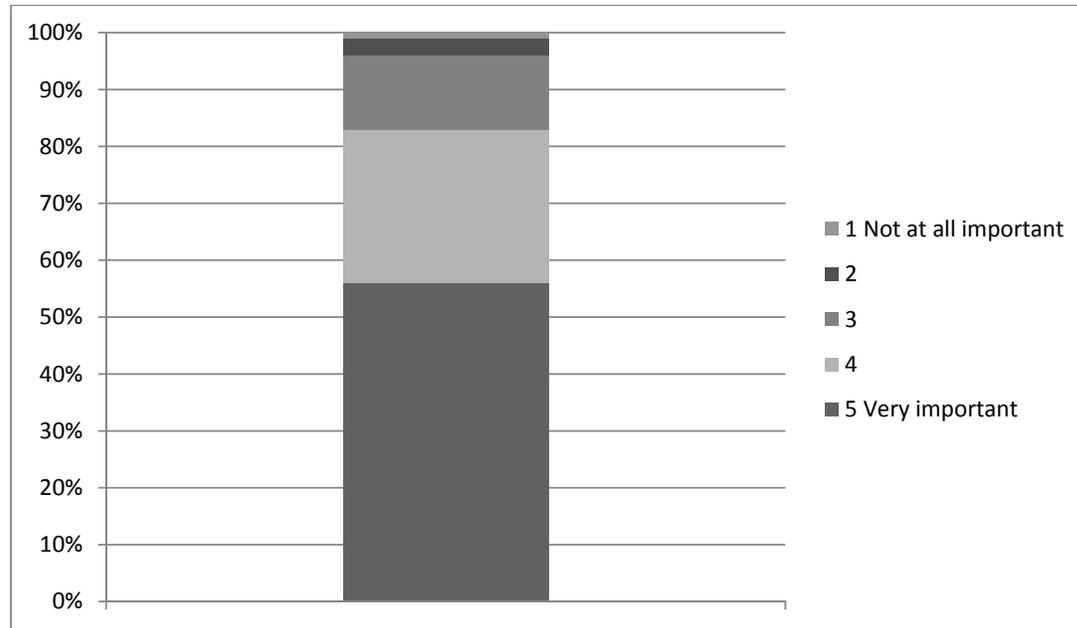


Source: Kjærnes et al, 2007, p. 2

<sup>1</sup> For more information on the methods of the survey see *Welfare Quality Reports No. 2: Part I.3.*

An overwhelming majority of Swedes claim animal welfare is an important issue as evidenced by the fact that 83 percent selected the two most positive responses (4 and 5), whereas a mere 4 percent say animal welfare is of no or little importance (1 and 2).

Figure 2: Importance of animal welfare for Swedish consumers



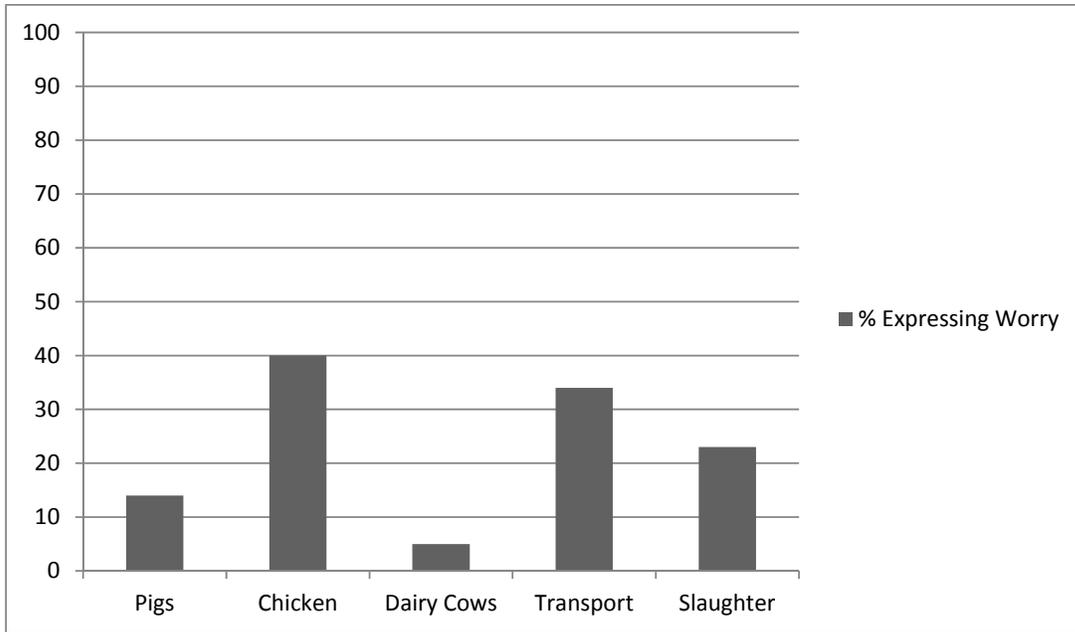
Thinking of animal welfare in general, how important is this issue for you? Source: Kjærnes et al, 2007, p. 12

### 3 Animal welfare concerns

Despite the high level of importance given to animal welfare, Swedes express low levels of worry for farm animal living conditions within Sweden. “Swedish respondents are systematically less worried for all these aspects of farm animal welfare” than respondents in other study countries (Kjærnes et al, 2007, p. 14). Few Swedes worry about pig or dairy production, although there is concern for poultry.

Consumers throughout Europe identified transportation and slaughter as particularly troublesome for welfare conditions with most study countries having a majority of people worried about one or both of these issues. Swedes are also concerned about these issues (34 and 23% respectively), but to a lesser degree than their non-Scandinavian counterparts.

Figure 3: Swedish consumers worried about animal welfare

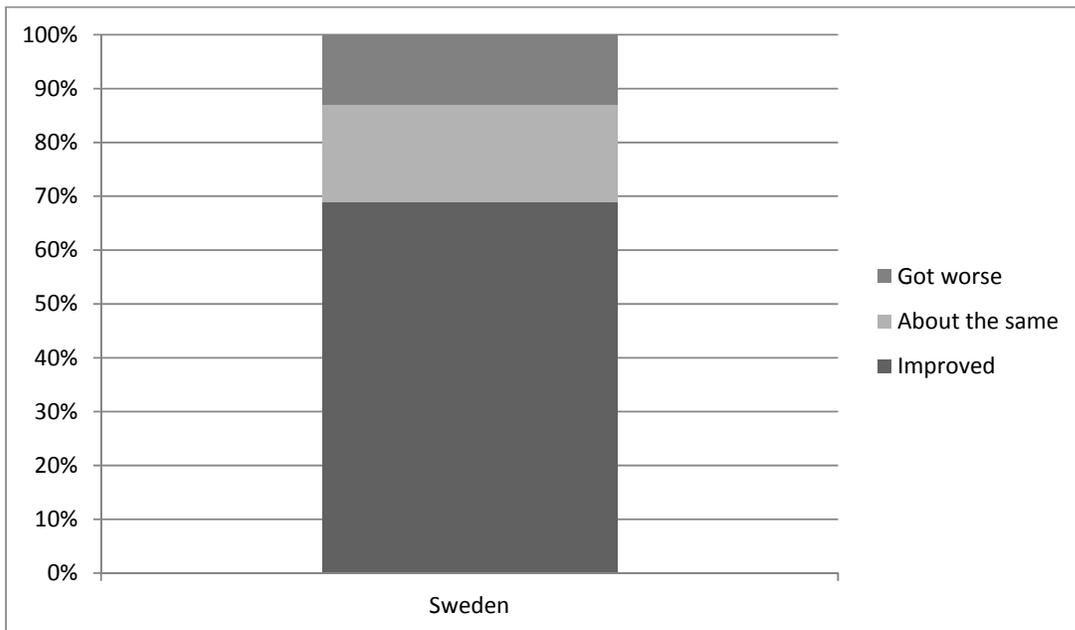


Percentage of consumers expressing worry about welfare for pigs, chickens, dairy cows, transport, and slaughtering. Source: Kjærnes et al, 2007, p. 14

#### 4 Changes in animal welfare

Most Swedes (69 percent) believe that farm animal welfare has improved over the last 10 years.

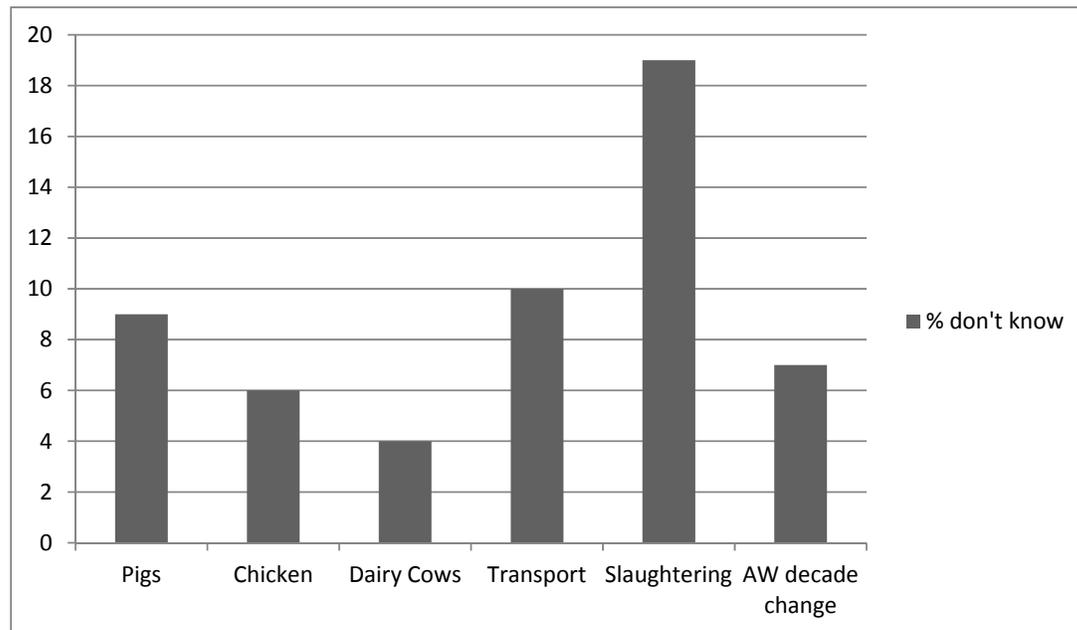
Figure 4: Swedish consumer perceived trend in animal welfare in the last decade



In general, over the past 10 years, do you think that farm animal welfare in Sweden has improved, is about the same or has got worse? Source: Kjærnes et al, 2007, p. 15

There was an elevated rate of don't know answers when respondents were asked specific questions about farm animal living conditions. This suggests that people had difficulty assessing the welfare status of farm animals, which could indicate lack of knowledge on these issues. Though it should be noted that answering the question does not necessarily mean the respondent is well informed.

Figure 5: High rates of 'don't know' answers from Swedish consumers

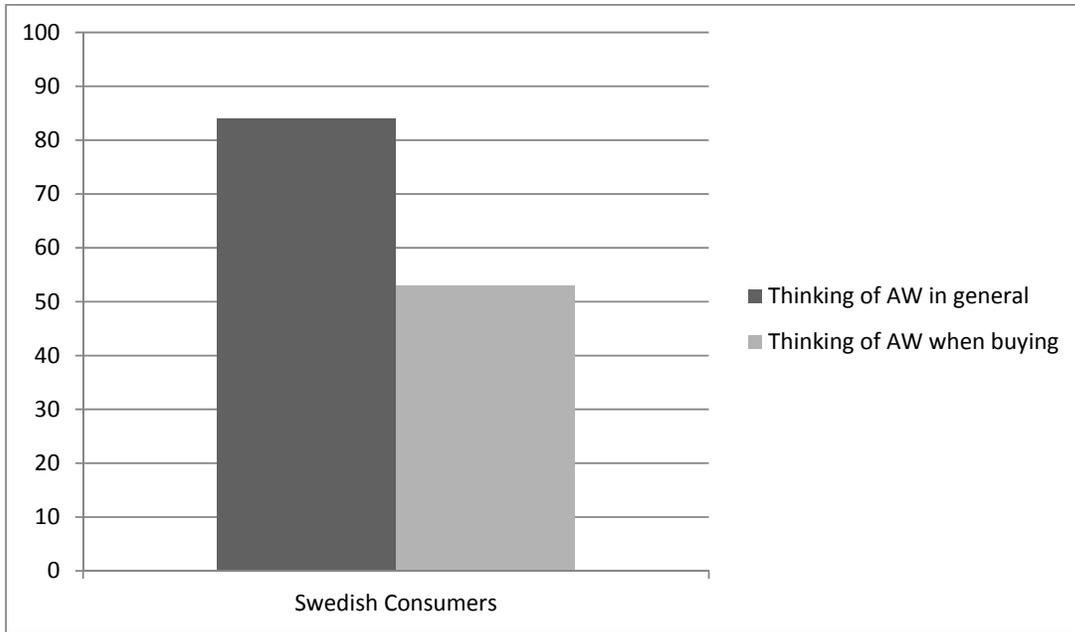


Proportion Swedish respondents saying they don't know whether farm animal conditions are good or bad. Source: Kjærnes et al, 2007, p. 16

### 5 Animal friendly products

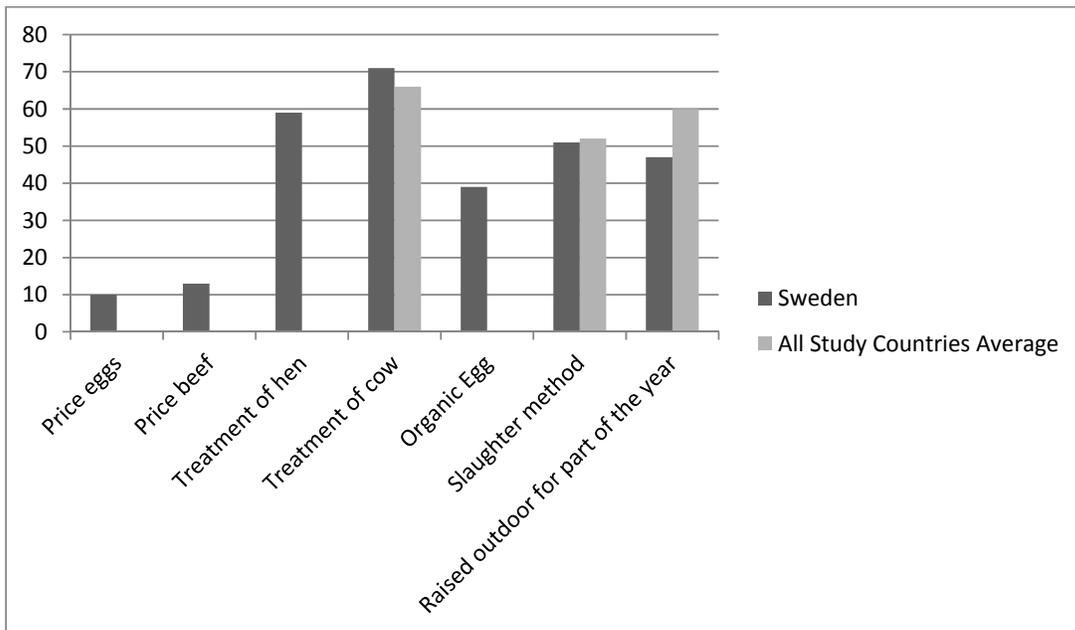
More than half of Swedes say they consider animal welfare when purchasing meat, with the treatment of cows for beef being slightly more important than the treatment of hens for eggs. These figures demonstrate that people do link farm animal welfare conditions to their role as food consumer. "However, considering the low market shares of animal friendly and organic products, the responses cannot be interpreted as practices of choosing particularly labeled products" (Welfare Quality Reports No. 2, 19). In other words, what consumers mean when they say they emphasize animal welfare when purchasing is more general, like preferring products coming from local or regional farmers or buying fresh products rather than pre-packaged.

Figure 6: Difference between Swedish consumers thinking of animal welfare in general and when buying



When you purchase meat or meat products, how often do you think about the welfare of the animals from which the meat has come? Source: Kjærnes et al, 2007, p. 18

Figure 7: Importance of animal welfare measures to Swedish consumers

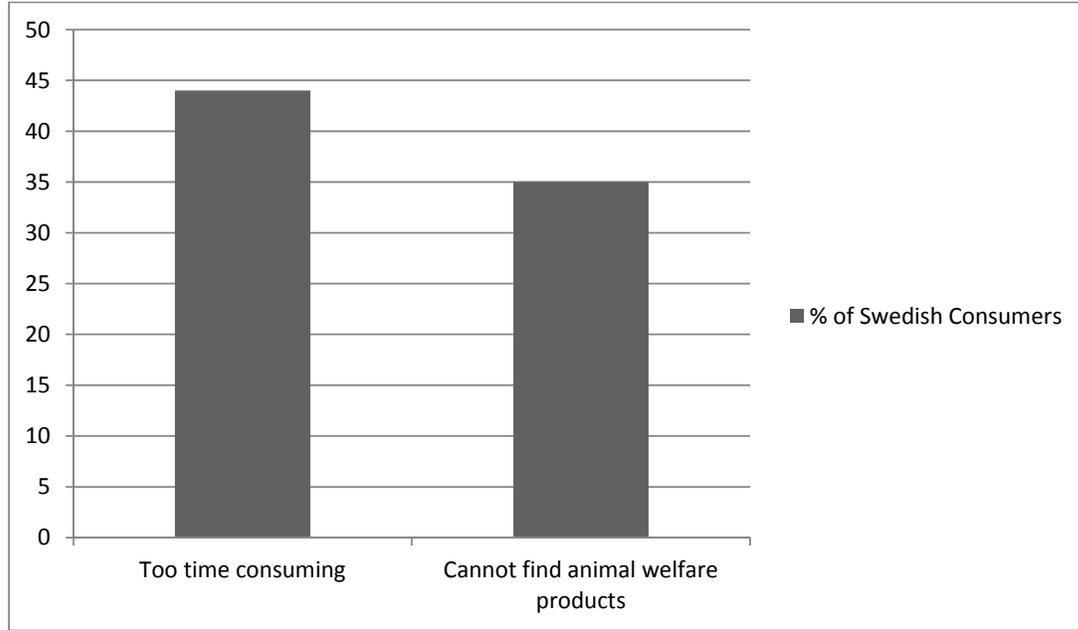


Are the following factors very important, fairly important or not important at all? A. Low price. B. Organic. C. Treatment of the hens. And now thinking especially of beef, are the following factors very important, fairly important or not important to you? A. Low price. B. Treatment of the animal. C. Slaughtering methods. D. Raised outdoors for part of the year. Figure shows percentages for consumers choosing very important. Source: Kjærnes et al, 2007, p. 18

### 6 Problem of price and availability

The importance of price for Swedish consumers is less important than in other countries. In fact, price is reported as less of a limiting factor than availability when considering purchases of eggs and beef.

Figure 8: Swedish consumers had difficulty finding and identifying animal friendly products



I care about animal welfare, but it's too time consuming to look for welfare friendly products.  
 I care about animal welfare but cannot find welfare friendly products where I shop for food.  
 Source: Kjærnes et al, 2007, p. 21

### 7 Reliable information sources

An overall level of trust in institutional actors is a prerequisite for effective communication, such as in a campaign or labeling scheme. Swedes are highly selective about information sources and clearly differentiated between various types of actors.

Table 2: Truth-telling case of a scandal with animal welfare. Percent proportions of “tell the whole truth”

	Proportion “telling whole truth”
<i>Civil Society</i>	
Mass media	27
Consumer organizations	52
Animal protectionists	35
Food experts	48
<i>Public Authorities</i>	

Politicians	5
Food authorities	46
EU	9
<i>Market Actors</i>	
Food processing	10
Food retailers	10
Farmers	24

Imagine a scandal concerning the welfare of chickens in Sweden. Do you think that each of the following would tell you the whole truth, only tell you part of the truth or would give you misleading information? Source: Kjærnes et al, 2007, 24

Consumer organizations, food experts, and food authorities are the most trusted, whereas politicians and the EU are the least. Sweden has a comparatively low level of trust in civil society actors, due in large part to relatively low trust in animal protection organizations. Of all the countries in the study Sweden has the highest level of trust in market actors, though trust in market actors is still low compared to all civil society actors and food authorities.

## Summaries of Parts I and II

### Highlights of consumer focus groups

- All participants did their main grocery shopping in supermarkets, including buying meat, eggs, and dairy products at the same supermarket as they buy the rest of their food.
- Participants expressed skepticism toward supermarket chains that more recently entered the Swedish market.
- Market-halls are used by a few participants for purchases for special occasions.
- It was desirable to purchase products directly from farmers, but this was only done by participants who had easy access to a farm.
- Participants dismissed the idea of Swedish products as better than foreign products as ridiculous, but nevertheless preferred to purchase Swedish meat.
- All groups agreed that price is an important factor in buying decisions, although not always the deciding factor.
- Level of animal welfare knowledge was generally low among participants.
- When asked to define animal welfare as it relates to the food industry many participants said it does not exist; this opinion was expressed by many groups and not just vegetarian and politically active groups.
- Participants were largely supportive of the Welfare Quality project's experts' list of animal welfare criteria.
- KRAV is the best known of the animal friendly brands, very few had heard of Ugglarp or Bosarp.

### Highlights of consumer surveys

- An overwhelming majority of Swedes claim animal welfare is an important issue; however, Swedes express low levels of worry for farm animal living conditions within Sweden.

- Don't know answers increased when respondents were asked specific questions regarding farm animal living conditions, which suggests that people had difficulty assessing the welfare status of animals.
- The majority of Swedes say they consider animal welfare when purchasing meat.
- Price is of less importance to Swedish consumers than consumers in other European countries surveyed.
- An overall level of trust in institutional actors is necessary for effective communication and Swedes are highly selective about information sources.

## **Bibliography**

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