

food production; profiling and segmentation of consumers; importance of consumer confidence and trust and future evolution of the higher welfare market.

In the past it has been found that, although consumers will say they are prepared to pay more for higher welfare goods, when actually faced with an obvious increased price margin at the point of purchase their good intentions falter and a cheaper option is commonly sought instead. This report encouragingly shows, however, that there is a changing trend in the buying habits of shoppers and that animal welfare does indeed influence consumer choices. In fact, IGD found that 64% of people consciously considered animal welfare when shopping and regularly purchased one or more higher welfare products. IGD considered higher welfare products to be: “meat, dairy and egg products that have been produced with the animals’ welfare in mind”.

To explain these changing shopping patterns IGD identified four main trends:

- *Increased disposable income*: allows consumers to consider factors other than price at the point of purchase and leads to more ethical decision making.
- *Decreased confidence in food production and influence of food scares*: organic, free range and higher welfare foods are perceived by many to have a higher traceability and safety than conventional, factory counterparts.
- *Increased awareness of food quality in relation to health*: organic, free range and higher welfare foods are perceived to be healthier and more natural.
- *Premiumisation*: Products can take on a ‘premium’ and desirable status due to economical, social and cultural drivers; this is beginning to be the case for higher animal welfare friendly products.

Other interesting areas illuminated by this study were broad consumer attitudes to farmed animals and their health and welfare. On the whole, consumers have an overly simplified view of the welfare of different animal species. Because dairy cows and sheep are seen outside in fields it is assumed that these animals are living naturally and therefore have good welfare; which is not always the case. Additionally, IGD found that although the public generally has some awareness of animal living conditions and feeding, focus groups revealed consumers know very little about the agricultural supply chain and, in particular, “are deliberately ignorant of anything that happens between slaughter and consumption”.

Understanding the reasons why consumers do or do not choose to purchase higher animal welfare products will enable the industry to address consumer concerns in a more meaningful and productive way. It is generally understood that people today spend far less of their income on food than in the early-mid 1900s and that most people could, if they chose to, spend more money on food. The IGD believe that there is potential to expand the higher welfare foods market through targeting and converting people who occasionally purchase welfare-friendly products; this group of people have already shown some level of motivation to consider

and buy high-welfare foods. To convert this section of consumers to ‘all welfare friendly’ shopping IGD believe that the public’s generally low awareness of animal production first needs to be addressed. Following this, higher-welfare shopping may then be encouraged through reinforcing beliefs and stimulating action at the point of purchase. Maintenance of higher-welfare purchasing may then be supported through products being of sufficiently high quality to ensure shoppers expectations are continually met and return purchases are made.

IGD believe that “this research will help to inform all stakeholders about what consumers want, help them to understand the issues around higher welfare products, and show them ways to make the most of the opportunities that now exist”.

**Consumer Attitudes to Animal Welfare: A Report for Freedom Food by IGD (2007)**. 66 pages A4. Published by the Institute of Grocery Distribution and available for download at: [www.freedomfood.co.uk/research](http://www.freedomfood.co.uk/research).

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### The ILPH Transportation Report Update

According to an update report by the International League for the Protection of Horses (ILPH) a total of 99,087 live horses were imported into, or transported between, European Union member states for slaughter in 2005; this is a significant decrease in figures since 2001. The ILPH found that the majority of horses transported for slaughter originated in Poland, Romania and Spain and were transported to Italy (84%), France (7%) and Belgium (5%). The ILPH suggest that more research needs to be conducted into the live transport of horses to fully understand the trade.

**The ILPH Transportation Report Update (2006)**. An International League for the Protection of Horses (ILPH) report on the number of live horses for slaughter and horsemeat moving into and between the EU member states, focus: Italy. 4 pages. A4. A copy of the report is available for download at: [http://www.ilph.org/documents/transportation\\_report2007.pdf](http://www.ilph.org/documents/transportation_report2007.pdf) or may be requested via email: [kirstenc@ilph.org](mailto:kirstenc@ilph.org).

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### The RADAR Cattle Book 2006: Descriptive Statistics about the Cattle Population in Great Britain

RADAR (Rapid Analysis and Detection of Animal-related Risks) is a comprehensive, computer-based management system that collects and collates veterinary surveillance data from throughout the United Kingdom. The RADAR scheme was developed as a practical means of achieving the aims of the Veterinary Surveillance Strategy which is an integral part of the Animal Health and Welfare Strategy instigated by DEFRA and aims to improve the health and welfare of all kept animals in England, Wales and Scotland. RADAR was first launched in 2005 and will undergo progressive developments until 2013; by which time disease informa-