

Consumer Views on Meat – Update paper

Issue

1. This paper provides an update on future consumer engagement activities that the MHS is planning to undertake in partnership with the FSA. It follows on from the information paper MHS Board (06) 66 (attached as Annex 1) tabled, but not discussed, at the 21 November 2006 MHS Board meeting.
2. The MHS Board is invited to:
 - **Note and comment** on the activity taking place in this area.

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1 Issue

1.1 This paper summarises the results of recent discussions with staff from the FSA's Consumer Branch and with Alick Simmons about possible joint MHS and FSA partnership working in the area of consumer views. The aim of this work will be to provide ongoing information to the MHS and FSA about consumers and their attitudes towards meat.

2 Background

2.1 The MHS Board paper (06) 66 (Annex 1) provided an overview of the work the MHS has already undertaken in engaging with consumer organisations as well as an update on the specific research conducted into consumer's views on meat. The MHS, working in partnership with the FSA Consumer Branch, commissioned some questions that were added to an omnibus survey in July 2006 of a representative sample of 2,000 GB adults. This survey aimed to do two things. Firstly to identify where in the production chain (i.e. from 'farm to fork'), consumers had concerns about meat and secondly to gauge consumer awareness of the MHS or other government officials.

2.2 The survey results concluded that whilst actual awareness of the MHS was low, most consumers think there is a body undertaking the function of the MHS. Once aware of the MHS consumers felt confident in the way in which British meat was dealt with.

2.3 The survey results did highlight other consumer concerns that are outside of the remit of the MHS, but over the last few months, work has progressed in partnership with colleagues in the FSA Consumer Branch and with colleagues from Defra to explore what other forms of information we need from consumers.

2.4 Over the next financial year the MHS will work in partnership with the FSA to understand more about the concerns that consumers have in relation to meat and build on our existing consumer engagement work.

3 Quantitative Consumer Research

3.1 The results of the survey commissioned in July 2006 are quantitative. Following discussion, it has been decided that the MHS and FSA will aim to repeat the survey at least annually, which will allow us to track consumer opinion over time. It is suggested that survey takes place in April/May 2007, as this will allow results to be taken into account when the FSA Board formally consider the review of models for delivering official controls in approved meat premises.

3.2 In this next survey, questions could be included which would indicate whether consumer confidence in meat would be affected by any change in the

body delivering official controls and any other topical issues. Initial discussions have taken place with the FSA Options Review Team to raise this possibility and this suggestion has been positively received. It will also be important to retain key questions from the last survey so that comparisons can be made over time.

3.3 In discussion, it was agreed that FSA Meat Policy colleagues need to be closely involved in this work, as policy establishes the controls the MHS is required to verify compliance with in approved premises. The MHS is exploring the possibility of sharing the survey costs with the Meat Hygiene Policy Branch.

4 Consumer Engagement

4.1 Qualitative exploration and investigation can often provide a depth of understanding that quantitative consumer research (as described above) is unable to. Therefore it is sensible to consider in the longer term using both quantitative and qualitative sources to gather consumer views.

4.2 Following this line of thought, consideration is being given as to how the MHS and the FSA Meat Hygiene Policy Branch can link into the overarching FSA consumer engagement programme on a long term basis.

4.3 The FSA's Consumer Branch is currently piloting Citizens Forums on Food, which they intend to set up, across the UK, later in the year. These Forums will meet three times a year to allow the FSA to have a two way dialogue with consumers. Each time the forums meet they will discuss a specific policy issue, along with a more general conversation about food concerns, stories in the media etc. The MHS is exploring the possibility of meat safety being one of the policy areas that these forums discuss in 2007/2008.

4.4 Not all consumers are the same, and in the longer term, the MHS, in conjunction with the FSA, could explore the possibility of presenting results by consumer segmentation to improve understanding of consumer views. This can be done on a demographic basis, but the FSA is increasingly using attitudes as a basis for segmentation in order to gain a better understanding of consumers.

5 Consumer Awareness

5.1 It is anticipated that awareness of the MHS and/or the slaughtering process may well increase over time due to a rise in the number of television programmes that have screened slaughtering – from Gordon Ramsay and Hugh Fearnley-Whittingstall slaughtering their own animals, to the programme due to be screened on BBC3 in March 2007, "Kill it, Cook it, Eat it" which televises the process of killing an animal, then cooking and eating it. This may well highlight any specific concerns.

5.2 The proposed next survey in April/May 2007 will measure any changes in awareness, or increased concerns, since the last survey in July 2006, and any medium term impact of the February 2007 avian influenza outbreak.

6 Consumer Organisations

6.1 Despite numerous attempts, to date the MHS has had limited success in its attempts to engage with consumer groups. Meat issues are not a high priority for them until there is a meat safety issue. However the MHS will continue its efforts to engage with consumer groups. The MHS will also explore, with the secretariat of the FSA Meat Hygiene Policy Forum, any further options on how the MHS and FSA can work in partnership to engage with consumer organisations effectively.

7 MHS Board Action

7.1 The MHS Board is invited to:

- **Note and comment** on the activity taking place in this area

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Consumer Views on Meat

Issue

1. This paper summarises the results of recent research into consumer views on meat and how the MHS and FSA plan to work together in the future.
2. The MHS Board is recommended to:
 - Note how the MHS and FSA plan to progress issues around consumer views on meat.

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1 Issue

1.1 This paper summarises the results of recent research into consumer views on meat and how the MHS and FSA plan to work together in the future.

2 Background

2.1 At the January 2006 MHS Board meeting the Chair stated that as no consumer groups had been able to attend the MHS Board stakeholder event in September 2005 it was important that consumers had another opportunity to influence the development of the future strategic direction of the MHS. In discussion, MHS Board members made the following points (in bold), and Chris Lawson assured them that these would be followed up. An update on activity in this area is detailed below;

2.2 Consumers need to be engaged to ensure that the development of a new vision considers the views of all stakeholders;

2.3 Consumers have been placed at the heart of the MHS Vision. A consumer group representative gave a presentation at the MHS Board stakeholder event on the 18 July 2006 in Cardiff.

2.4 It may be beneficial to try to engage consumers directly as well as organisations representing consumers;

2.5 The possibility of holding meetings with consumer representatives was taken forward. It proved difficult to get consumer groups to engage with the MHS. Eventually on 23 March 2006 Sue Dibb, Senior Policy Adviser for the National Consumer Council met with Chris Lawson and Chrissie Dunn. At that meeting Sue Dibb suggested that the MHS could update consumer organisations through a regular newsletter. The MHS recognise that proactive, regular communication with our stakeholders, including consumers, needs to be developed and implemented. The Communications Manager is currently investigating our options in this area.

2.6 A survey was conducted in July 2006 to directly capture consumers views on meat safety issues.

2.7 Consideration could be given to offering a secondment in the MHS to someone from a consumer organisation to help the MHS build relationships with consumer organisations;

2.8 Having analysed the results of the MHS Consumer research the MHS does not feel that this course of action will be beneficial at this current time (see section 4 onwards for more details).

2.9 The difficulty experienced in arranging a meeting with consumer representatives appeared to be due to their limited availability and that meat issues appeared not to be a priority for consumer groups;. It may

be helpful to organise MHS-consumer groups meeting(s) after regular FSA meetings with stakeholders such as the Meat Hygiene Policy Forum or FSA Chief Executives Consumer Forum;

2.10 Consumer groups were invited to a meeting to discuss any issues they had with Chris Lawson and Chrissie Dunn after the Meat Hygiene Policy Forum on 2 March 2006. However as only 1 person expressed an interest in participating, this did not go ahead.

2.11 Consultation needs to be innovative and all opportunities explored.

2.12 The MHS has developed links with the FSA Consumer Branch and a series of meetings have taken place. The Consumer Branch presented a consumer engagement model to the FSA Board in October 2006 proposing a new model for consumer engagement. The MHS will continue to work with the FSA Consumer Branch.

3 Survey Background

3.1 The FSA annual Consumer Attitudes Survey of a representative sample of over 3,000 UK adults shows that meat is the most common type of food mentioned when consumers are asked about their concerns about food safety, both spontaneously and when prompted. In 2005 when asked about concerns about the safety of particular food types 57% spontaneously responded that they had concerns about meat, rising to 72% when prompted (see Annex A for details).

3.2 However the FSA annual survey does not explore what it is about meat that consumers are concerned about, or what they think or know about the MHS. Therefore, to explore these issues further the MHS, working in partnership with the FSA Consumer Branch, commissioned some questions to be added to an omnibus survey in July 2006 of a representative sample of 2,000 GB adults. The results of this survey were initially shared with the MHS Board at its awayday in September and are highlighted below along with details of how the MHS will work with the FSA to progress any issues. The full results are attached at Annex B for information.

4. Survey Results Concern about the safety of meat produced in Britain

4.1 Four in ten (42%) respondents expressed some concern about the safety of meat produced in Britain when prompted.

4.2 Amongst those who expressed concern, the leading worries were;

- The conditions in which livestock is raised (36%)
- The way processed meat products are prepared (35%)
- The way animals are transported (34%)
- The feed given to livestock (33%)

4.3 One in three (29%) of those concerned about the safety of meat said they were concerned about the way animals were treated in the abattoir. When asked what they were concerned about in abattoirs, the majority (66%) said it was the general welfare of the animal rather than the actual slaughtering process.

4.4 In summary, although a significant proportion of consumers say they are concerned about the safety of meat, when asked specifically what they are concerned about a wide range of concerns are stated covering the whole of the 'farm to fork' chain. Most of these concerns fall outside of the remit of the MHS.

4.5 It should be noted that one in five respondents who say they are concerned about the safety of meat, are unable to name a specific issue regarding meat production they are worried about, even when prompted. This could suggest a lack of knowledge about farming, slaughtering and production, or a lack of willingness to think about these processes - both of which have arisen in previous qualitative research which the FSA has conducted.

Awareness of the MHS

4.6 Two-thirds (67%) of respondents think that abattoirs and/or meat cutting premises are monitored by government inspectors, when shown a list of possible inspected premises.

4.7 However, spontaneous awareness that it is the MHS that conducts these inspections is very low (3% of those who think abattoirs and/or meat cutting premises are inspected). Three-quarters (74%) of respondents who know of the inspections, were unable to name the body they thought conducted them.

4.8 After being prompted with a short description of the MHS:

- Awareness increased to 22% of respondents;
- Two-thirds (65%) said they were confident about the safety of the meat produced in Britain (and a further 15% were neither confident or unconfident).

4.9 In summary, whilst awareness of the MHS is low most consumers think there is a body undertaking the function of the MHS and feel confident in the safety of British meat knowing that the MHS exists. These findings are not surprising given the low levels of concern about what occurs in abattoirs, and a consumer unwillingness to find out more.

5 Next steps/Conclusion

5.1 The findings have provided the MHS with information about consumer views and attitudes towards meat. However the findings show a low level of consumer interest in the work of the MHS, and a potential unwillingness to

understand how meat is produced. It is therefore proposed that there is currently no need to further improve consumer awareness or understanding or to develop a specific MHS consumer engagement strategy.

5.2 These results have already been shared with colleagues in FSA Meat Hygiene and Veterinary Division, the Defra Animal Welfare Division and the Meat and Livestock Commission.

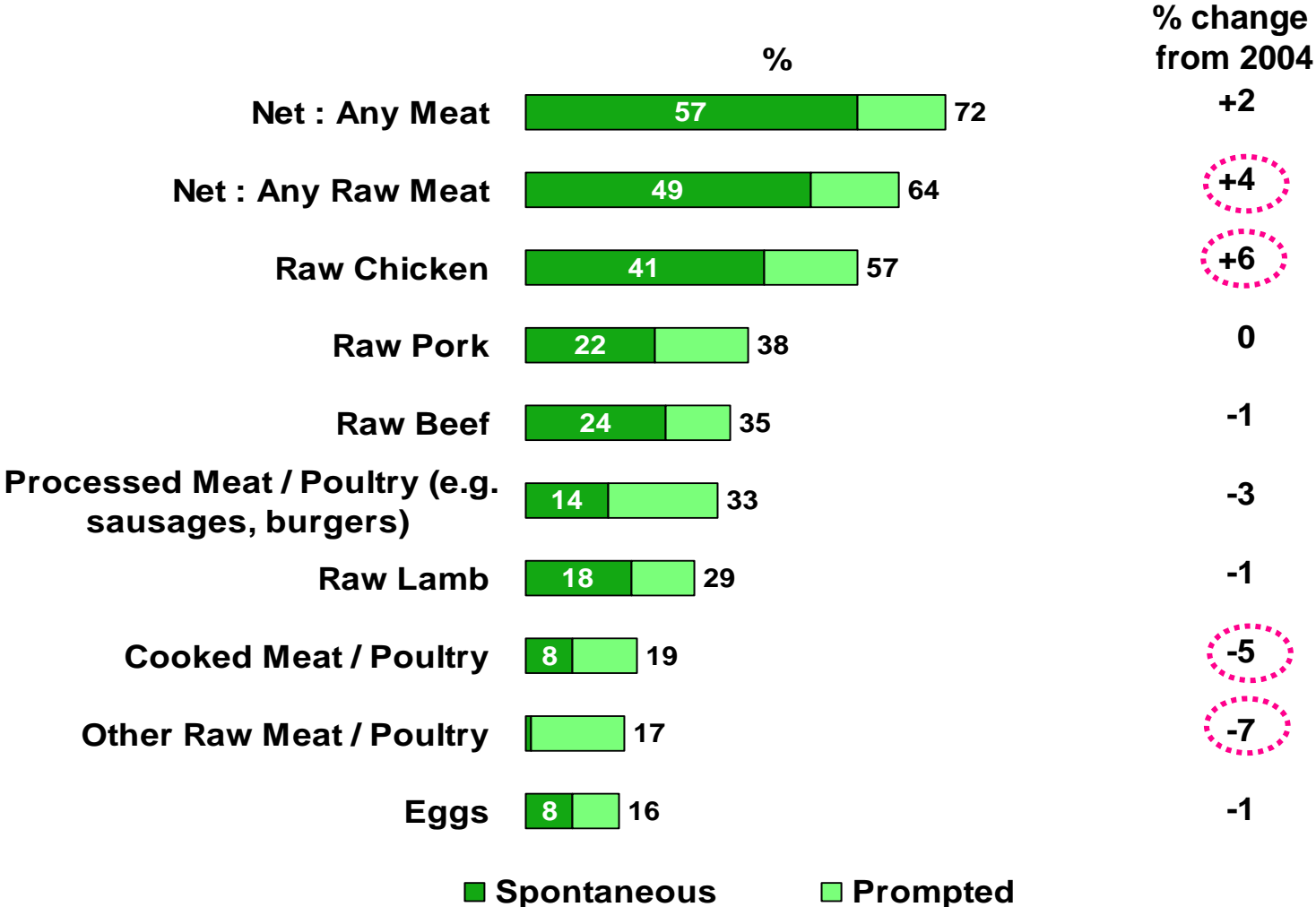
5.3 The level of concern about the safety of meat will continue to be measured in the FSA's annual and quarterly consumer surveys. It is recommended that the questions which were used in July 2006 could be re-commissioned in the future only if there is a need:

- To help understand if there are any large changes captured in the FSA Consumer Attitudes surveys and/or
- In the event of "food scare" about the safety of meat that might affect public opinion about meat production or awareness of the MHS.

5.4 Issues around meat production may be included as part of the FSA ongoing consumer engagement programme, or in further qualitative work, and findings from these will be shared with the MHS. FSA Consumer Forum events are planned but whether meat issues are covered will depend upon what consumers wish to discuss. The purpose of these forums is for consumers to raise issues of importance to them, at that time, with the FSA. The MHS and FSA Consumer Branch will continue to communicate on these issues and continue to involve the Meat Hygiene and Veterinary Division, the Defra Animal Welfare Division and the Meat and Livestock Commission as necessary.

5.5 This paper has been produced in conjunction with the FSA Consumer Branch.

Annex A - Concern about safety of types of food - meat / eggs



=Sig. at 95%

Base : All respondents - 2005 (3143)

Q24a Do you have concerns about the safety of any particular types of foods? / Q24b Do you have concerns about the safety of any of these types of food?

Awareness of the Meat Hygiene Service

July 2006

Background

- ❑ Eight questions regarding awareness of the Meat Hygiene Service and level of concern about the safety of meat produced in Britain were placed on the RSGB face to face omnibus. The omnibus interviews a nationally representative sample of adults aged 16+ in Great Britain.
- ❑ The fieldwork period for this research was 26th – 30th July 2006. The survey interviewed a representative sample of 1,973 adults.
- ❑ The questions covered:
 - ❑ Concern about the safety of meat produced in Britain
 - ❑ Which aspects of the safety of meat cause concern
 - ❑ Awareness that abattoirs, meat cutting premises and catering butchers are monitored
 - ❑ Awareness of the Meat Hygiene Service
 - ❑ Confidence in the safety of meat produced in Britain

Summary

Concern about the safety of meat produced in Britain

- ❑ Four in ten respondents (42%) expressed some concern about the safety of meat produced in Britain
- ❑ Women were more concerned than men. Those with the main responsibility for shopping were more concerned than those who were not primarily responsible
- ❑ Leading concerns:
 - ❑ the conditions in which livestock is raised (36%)
 - ❑ the way processed meat products are prepared (35%)
 - ❑ the way animals are transported (34%)
 - ❑ the feed given to livestock (33%)
- ❑ The way in which animals are treated in the abattoir was a concern for 29% of respondents

Summary

Awareness of the Meat Hygiene Service

- ❑ Two thirds of respondents (67%) thought that either abattoirs and/or meat cutting premises and catering butchers were monitored by government inspectors, when shown a prompted list
- ❑ Spontaneous awareness of the Meat Hygiene Service was very low, with just 3% of those who thought abattoirs, or meat cutting premises and catering butchers were monitored, naming the Meat Hygiene Service (2% of all respondents).
- ❑ After being prompted with a short description of the Meat Hygiene Service,
 - ❑ total awareness increased to 22% of all respondents
 - ❑ 65% of respondents said they were fairly or very confident about the safety of meat produced in Britain

Concern about the safety of meat produced in Britain




Base : All respondents (1,973)

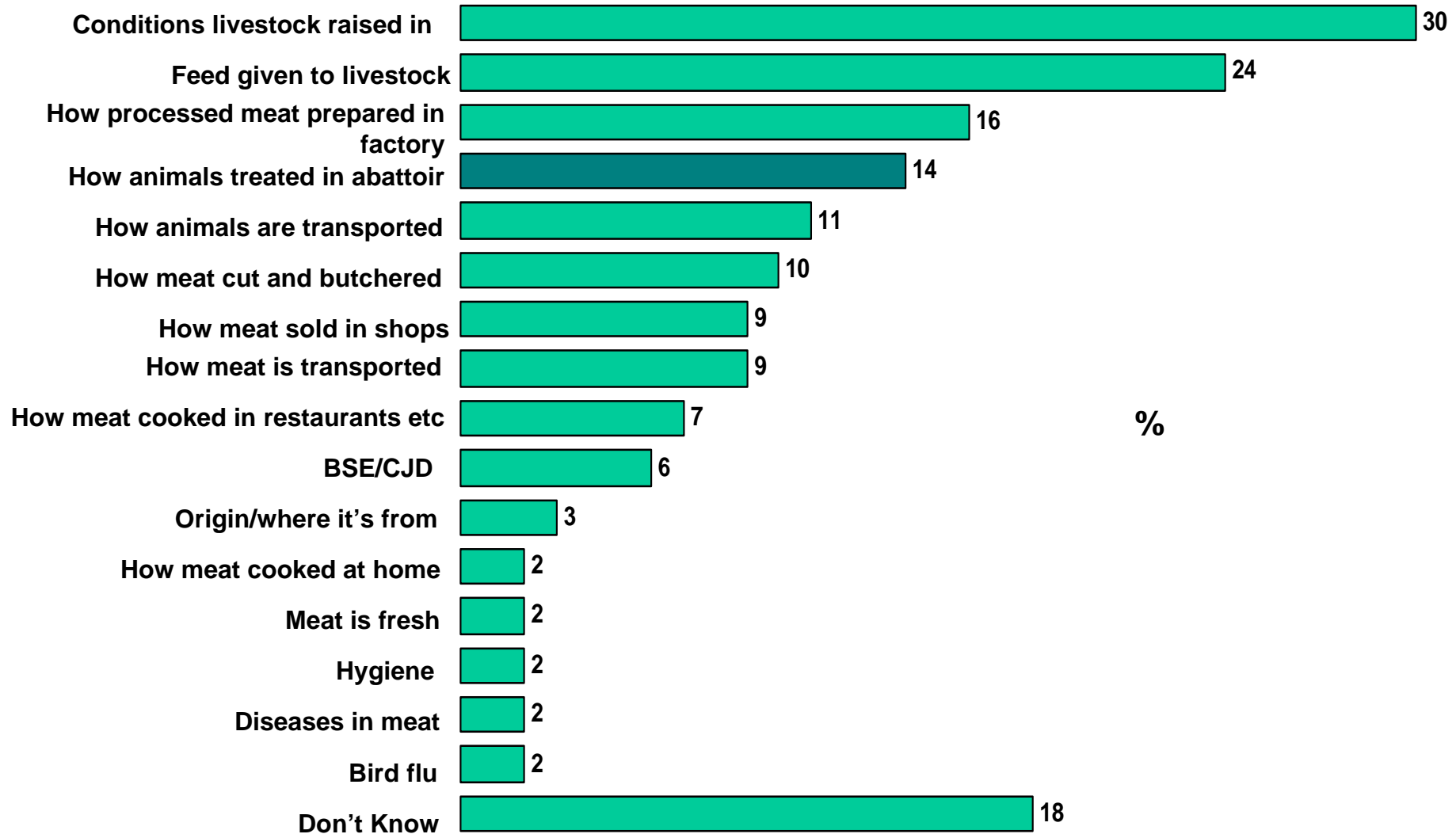
Q1. Generally speaking, which one of the following statements best describes your attitude to the safety of meat produced in Britain?

Concern about the safety of meat (fairly/very concerned)

	%
All Adults	42
Men	38
Women	46
16-24	34
25-34	44
35-44	40
45-54	43
55-64	46
65+	45
AB	43
C1	40
C2	47
DE	41
Married	43
Single	38
Separated / widowed / divorced	46
Principal shopper	44
Non principal shopper	38
Children in household	45
No children in household	41

 = Statistically significantly higher compared to at least one other sub-group within category

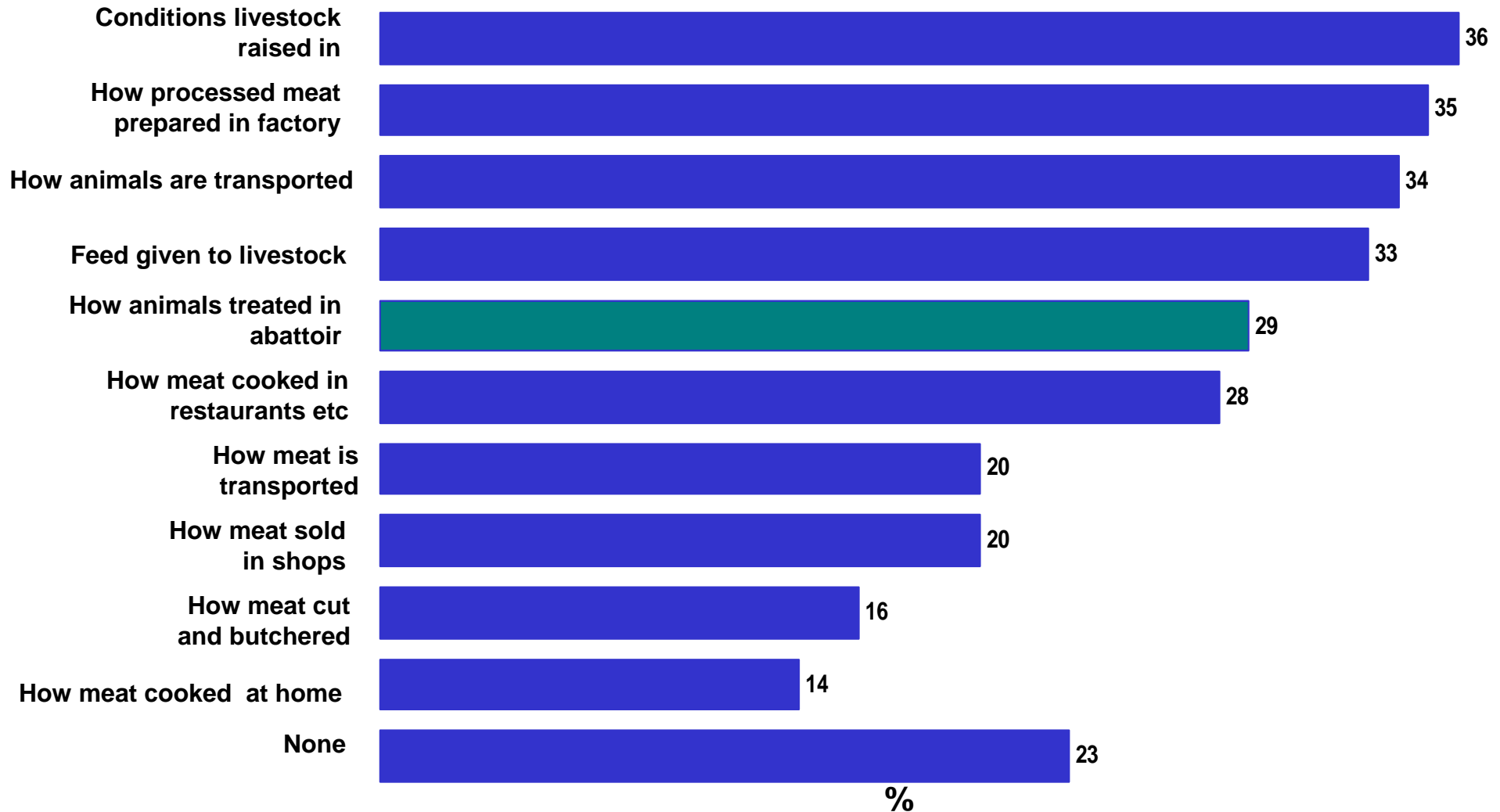
Concerns about the safety of meat (spontaneous)



Base : All who are fairly/very concerned about the safety of meat produced in Britain (845)

Q2. What issues about the safety of meat produced in Britain, if any, are you concerned about?

Concerns about the safety of meat (total)




Base : All respondents (1,973)

Q2. What issues about the safety of meat produced in Britain, if any, are you concerned about?;

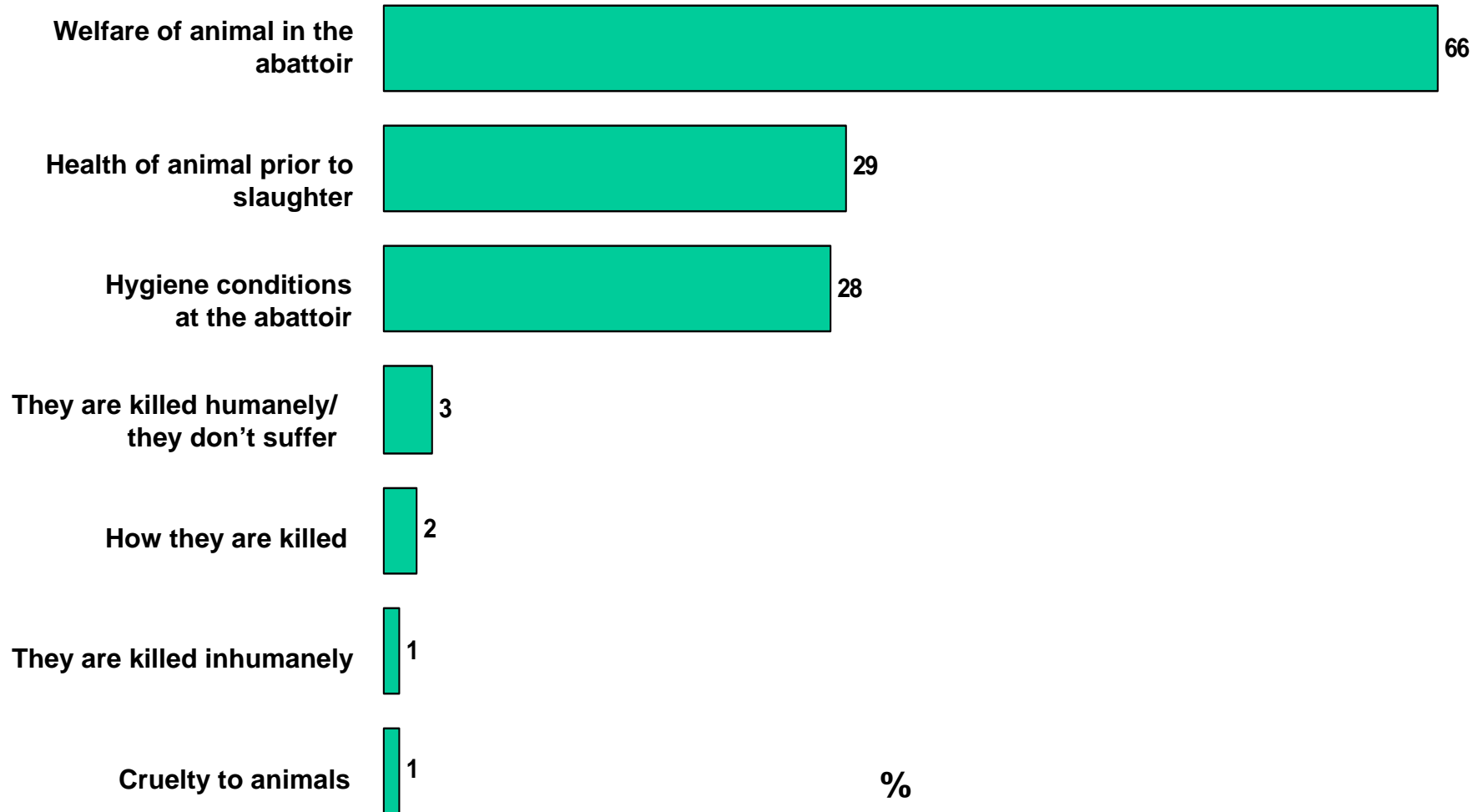
Q3. Which of the following issues, if any, are you concerned about regarding the safety of meat?

Concern about way animals treated in the abattoir

	%
All Adults	29
Men	23
Women	34
16-24	23
25-34	27
35-44	31
45-54	34
55-64	30
65+	26
AB	36
C1	28
C2	28
DE	25
Married	29
Single	26
Separated/widowed/divorced	30
Principal shopper	31
Non principal shopper	24
Children in household	28
No children in household	29

 = Statistically significantly higher compared to at least one other sub-group within category

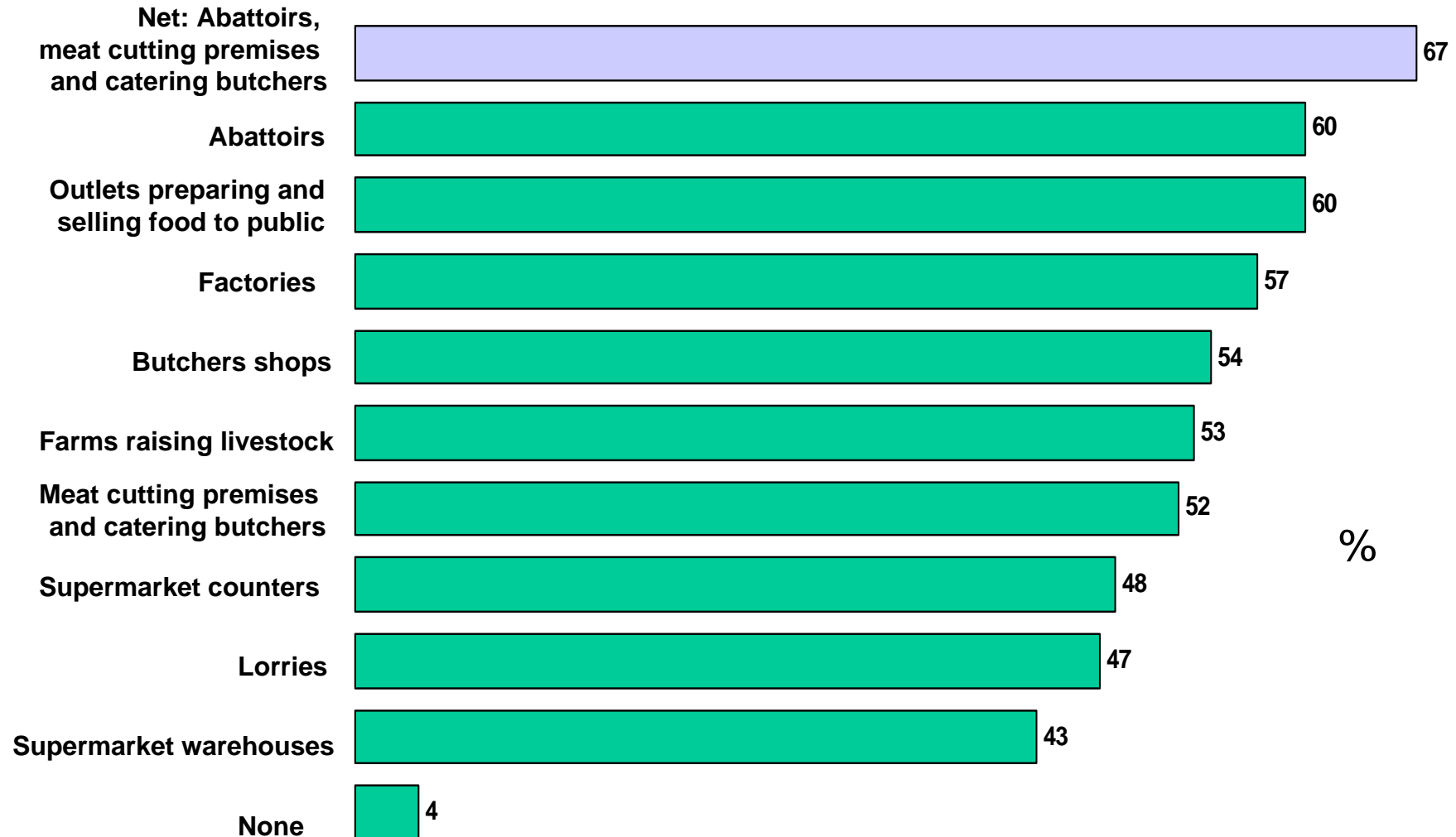
Concerns about way animals treated in the abattoir **COI**[👑] (spontaneous)



Base : All who are concerned about how animals are treated in abattoir (569)

Q4. What are your particular concerns about the way in which animals are treated in the abattoir?

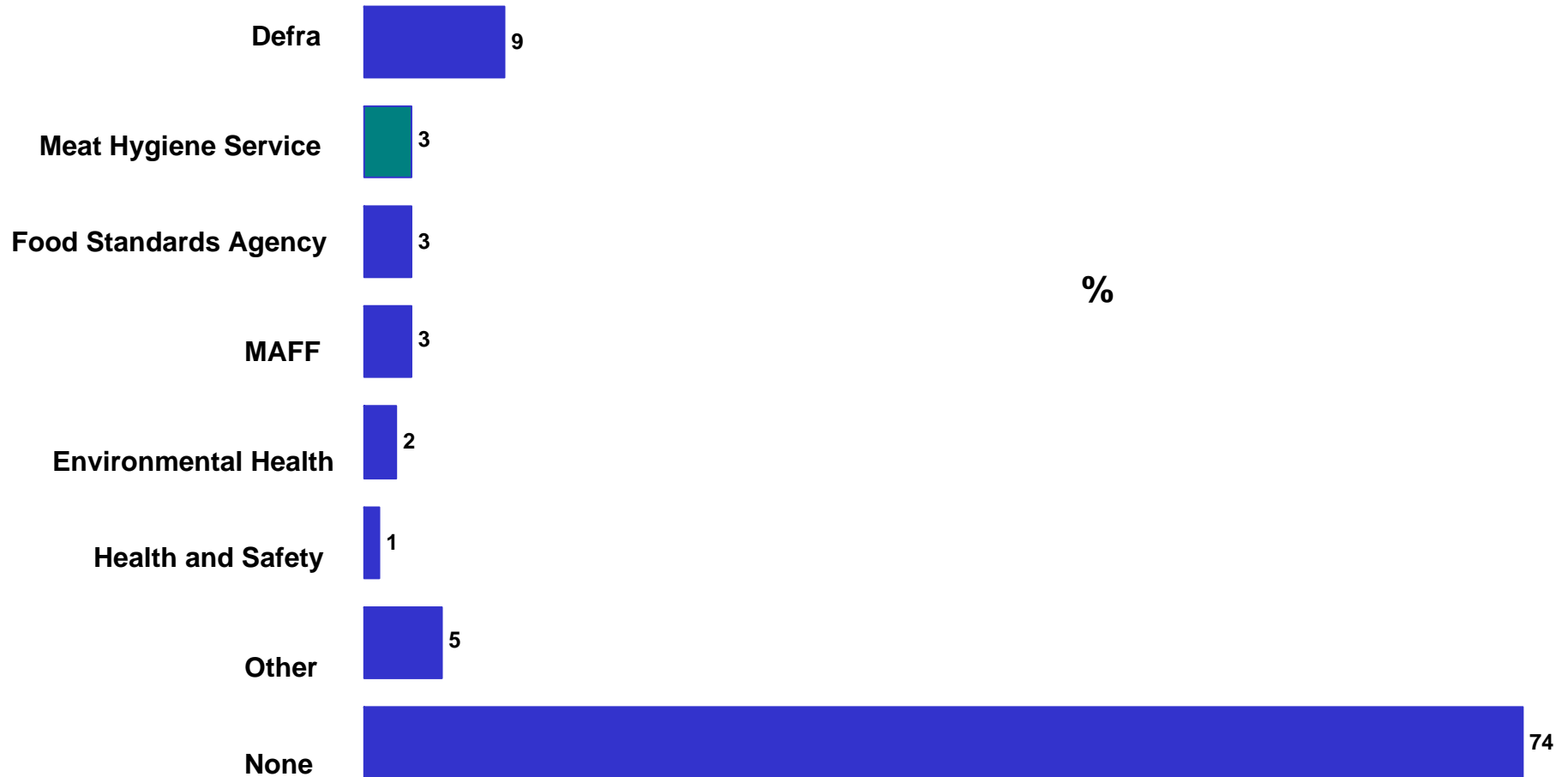
Monitoring by government inspectors



Base : All respondents (1,973)

Q5. Which of the following, if any, do you think are monitored by government inspectors?

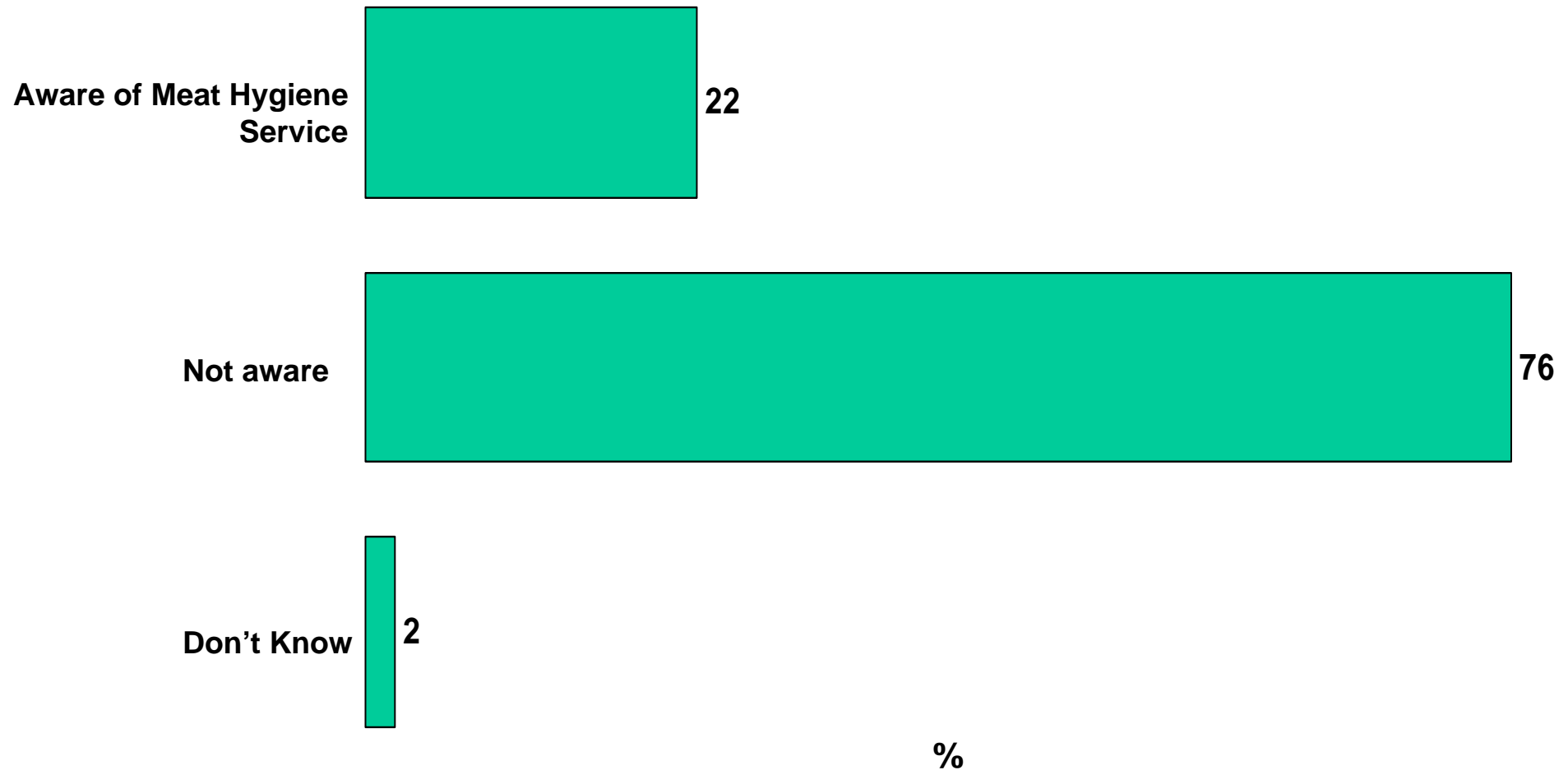
Awareness of Meat Hygiene Service (spontaneous)



Base : All who think abattoirs, or meat cutting premises and catering butchers, are monitored by government inspectors (1,316)

Q6. Do you know the name of the government agency which inspects abattoirs, meat cutting premises and catering butchers?

Awareness of Meat Hygiene Service (total)




Base : All respondents (1,973)

Q6. Do you know the name of the government agency which inspects abattoirs, meat cutting premises and catering butchers?; Q7. Before this interview today were you aware of the Meat Hygiene Service?

Awareness of Meat Hygiene Service (total)

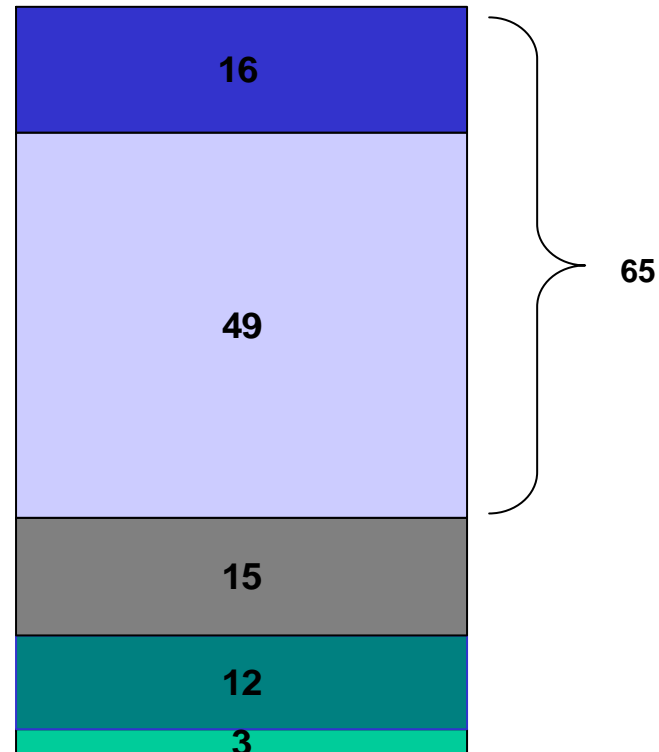
	%
All Adults	22
Men	24
Women	20
16-24	19
25-34	19
35-44	22
45-54	21
55-64	27
65+	23
AB	22
C1	20
C2	26
DE	21
Married	24
Single	19
Separated / widowed / divorced	21
Principal shopper	22
Non principal shopper	23
Children in household	19
No children in household	23

 = Statistically significantly higher compared to at least one other sub-group within category

Confidence about the safety of meat produced in Britain

%

- Very confident
- Fairly confident
- Neither confident nor unconfident
- Not very confident
- Not at all confident




Base : All respondents (1,973)

Q8. Taking into account that the Meat Hygiene Service exists, how confident do you feel about the safety of the meat produced in Britain?

Confidence in safety of meat produced in Britain (very/fairly confident)

	%
All Adults	65
Men	67
Women	64
16-24	64
25-34	64
35-44	64
45-54	65
55-64	66
65+	68
AB	69
C1	66
C2	65
DE	63
Married	68
Single	63
Separated/widowed/divorced	61
Principal shopper	65
Non principal shopper	67
Aware of MHS	72
Not aware of MHS	63

 = Statistically significantly higher compared to at least one other sub-group within category

COI

