



FSAI

**The Aftermath of the Horse
Meat Incident**

June 2013

Prepared for:



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Research Objectives

- In the aftermath of the Horse Meat incident, the FSAI wished to undertake a piece of consumer research that would investigate the impact the incident has had on consumer purchasing behaviour of different types of meat and meat products.
- A questionnaire was developed and included in a National omnibus survey.
- The topic areas covered in the study included:-
 - ❖ Confidence levels in food safety controls
 - ❖ Awareness of the Horse Meat incident
 - ❖ The impact this awareness has had on purchaser behaviour
 - ❖ Level of concern consumers experienced about having unwittingly consumed horse meat (and reasons for their concern)
 - ❖ Awareness that Ireland was the first country to find horse meat traces in food
 - ❖ Current purchasing behaviour around specified products

Methodology

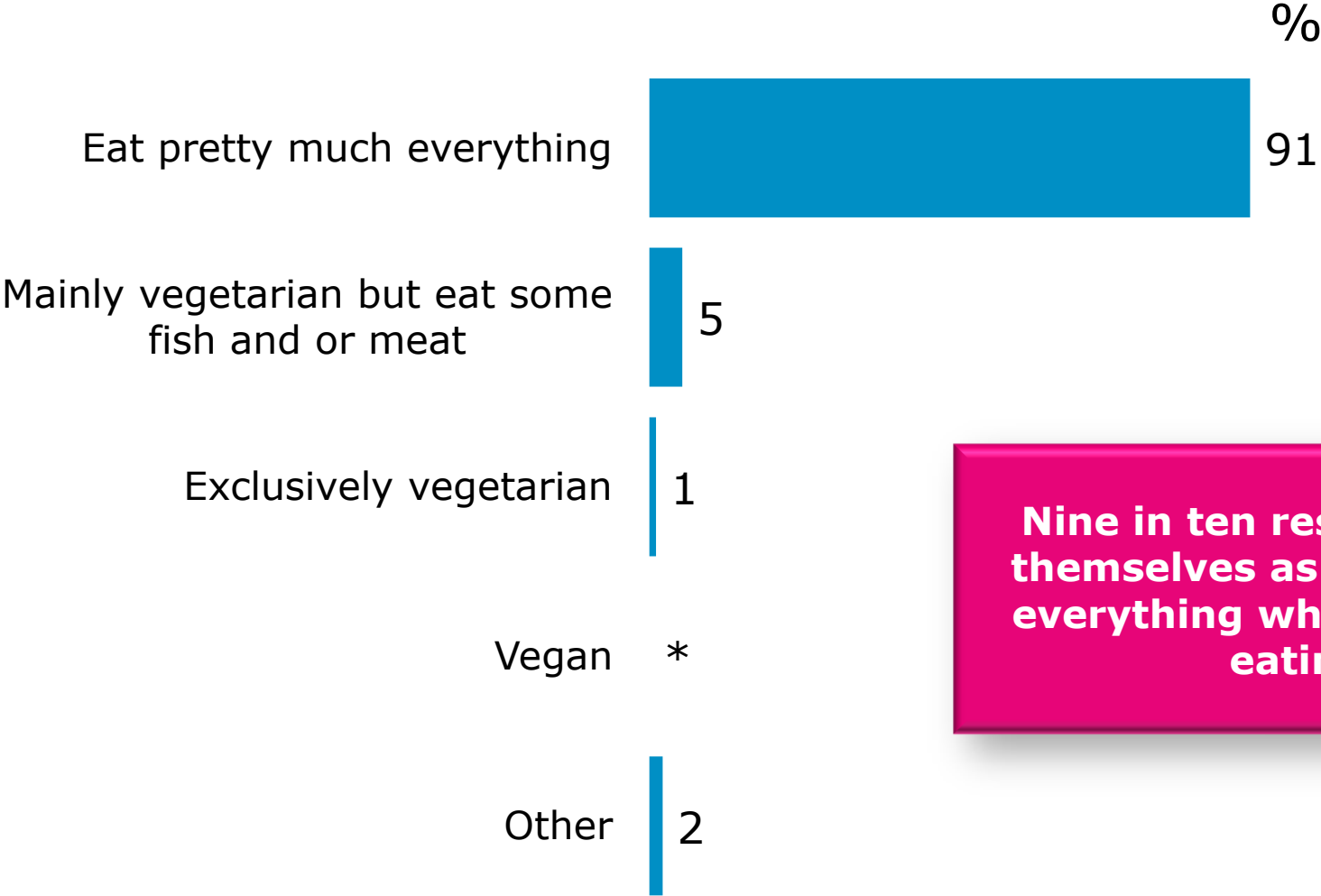
- Questionnaire was agreed and included in the Behaviour & Attitudes TeleBarometer survey.
- This uses a syndicated approach to collecting information from a national sample of adults 16+.
- Interviewing is handled over the telephone by trained members of the Behaviour & Attitudes CATI team.
- The sample is regionally stratified and quota controlled in terms of gender, age, and county. Half the sample is called through random digit dial mobile numbers (so as to ensure inclusion of homes that no longer have landlines).
- The data is weighted then to population norms for gender, age, social class, region and area to match the known demographics of the population.
- Fieldwork on the project was undertaken between the 16th and 30th of May, 2013.

1. Size of the vegetarian base in Ireland?



Best Description of personal diet

Base: All Adults 16+ (n = 1,003)



Nine in ten respondents describe themselves as eating pretty much everything when it comes to their eating habits.



Best Description of Eating Habits in Detail

Base: All Adults 16+ (n = 1,003)

		Gender		Social Grade		Region			
	Total	Male	Female	ABC1	C2DE	Dublin	Leinster	Munster	Conn/ Ulster
Base:	1,003	486	517	471	532	269	257	300	177
	%	%	%	%	%	%	%	%	%
Eat pretty much everything	91	91	90	92	89	87	92	93	91
Mainly vegetarian but eat some fish and or meat	5	4	7	4	6	6	5	5	5
Exclusively vegetarian	1	1	2	2	1	3	1	-	2
Vegan	*	*	-	*	-	*	-	-	-
Other (specify)	2	3	1	1	3	3	1	3	2

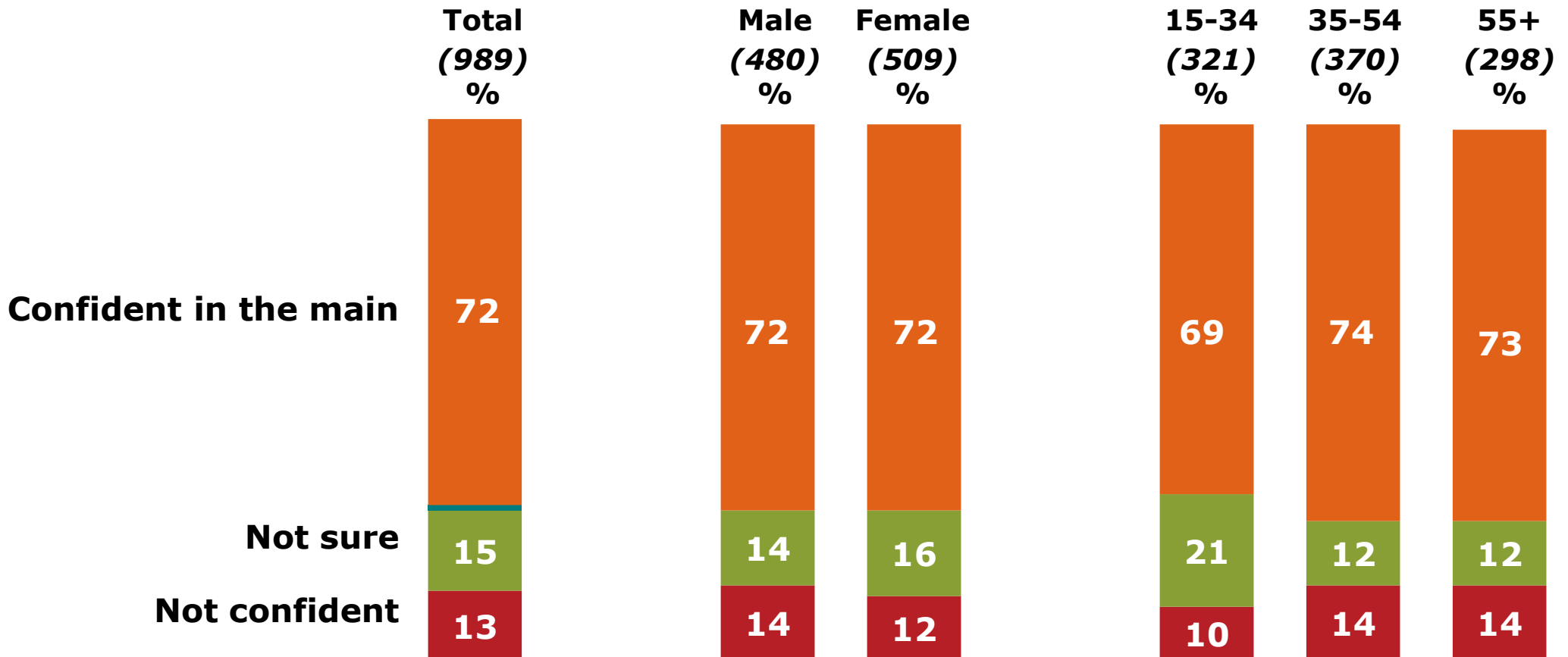
Dublin tends to have more exclusive vegetarians, casual vegetarians and vegans.



2. Confidence in Food Safety Controls in Ireland

Level of Confidence in Irish Food Safety Controls

Base: All Meat-eaters (n = 989)

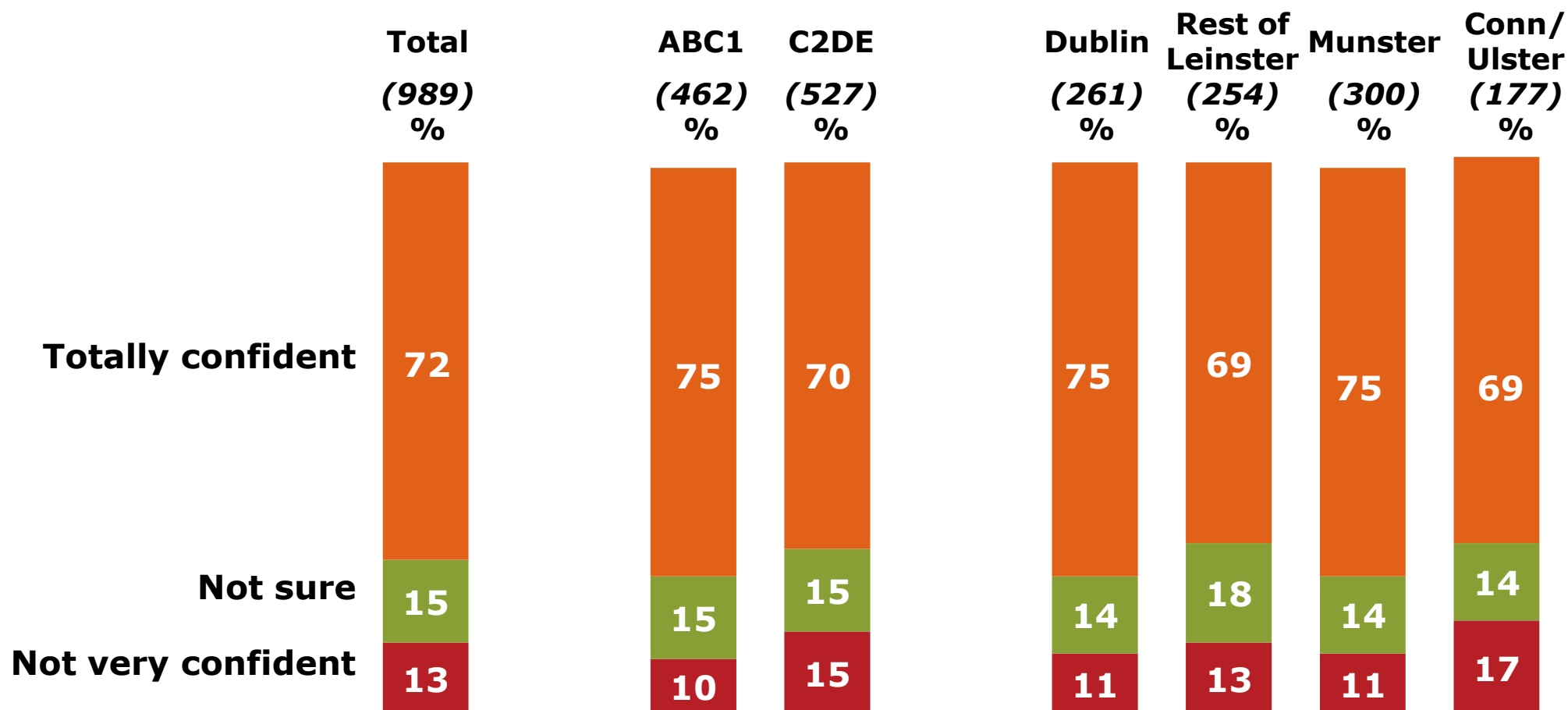


The large majority of adults are confident in Irish food safety controls and regulations.



Level of Confidence in Irish Food Safety Controls

Base: All Meat-eaters (n = 989)



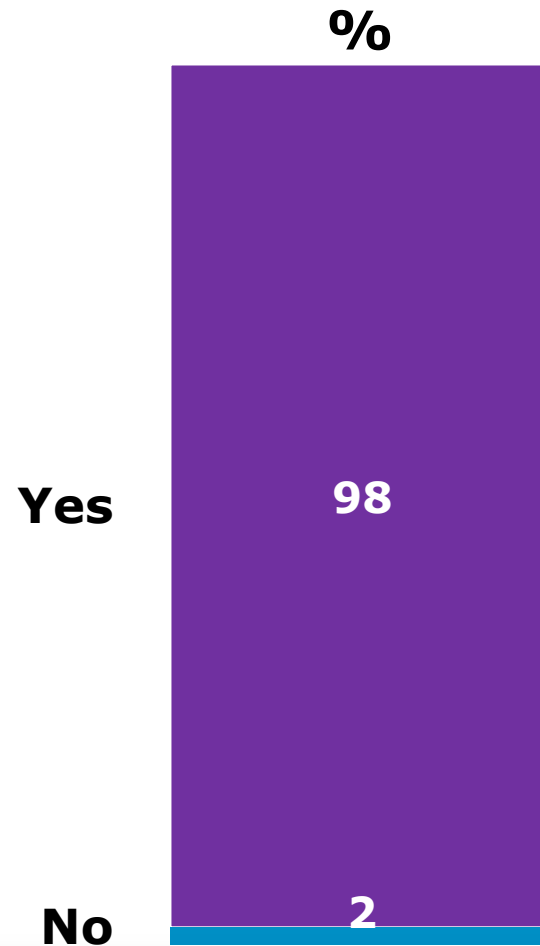
Those living in Dublin and Munster have the most confidence in food safety.



3. Impact of Horse Meat Incident

Incidence of people hearing of traces of horse meat being found in burgers & other types of food

Base: All Meat-eaters (n = 989)



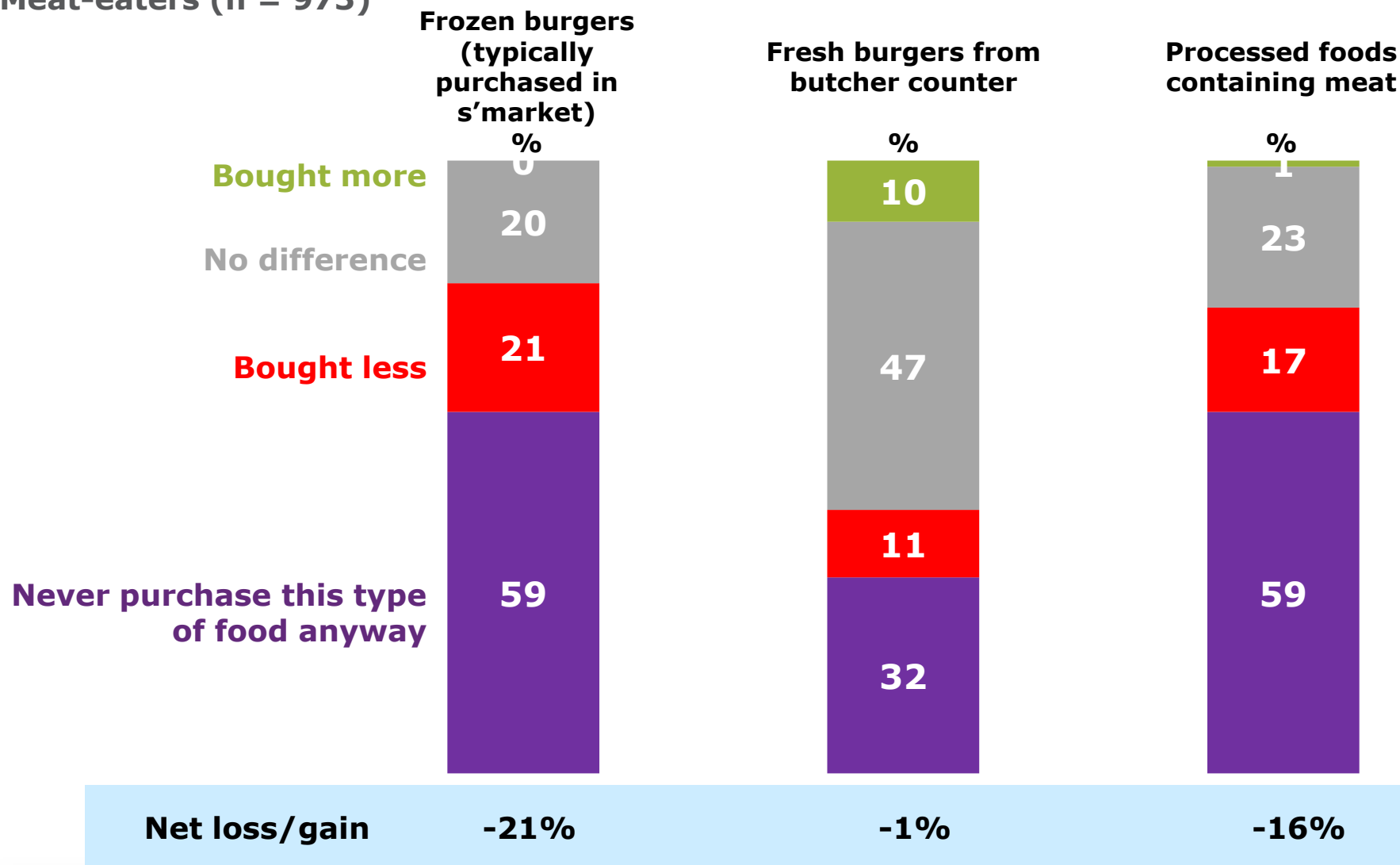
Virtually all adults in the country have heard of the recent horse meat incident. This proportion stays consistently high across all key demographics.



Q. Did you hear anything about issues surrounding traces of, and sometimes more, of horse meat being found in burgers and other foods such as lasagne, shepherd's pie, that sort of thing?

Impact of Horse Meat Incident on Buying Habits – Summary

Base: All Meat-eaters (n = 973)



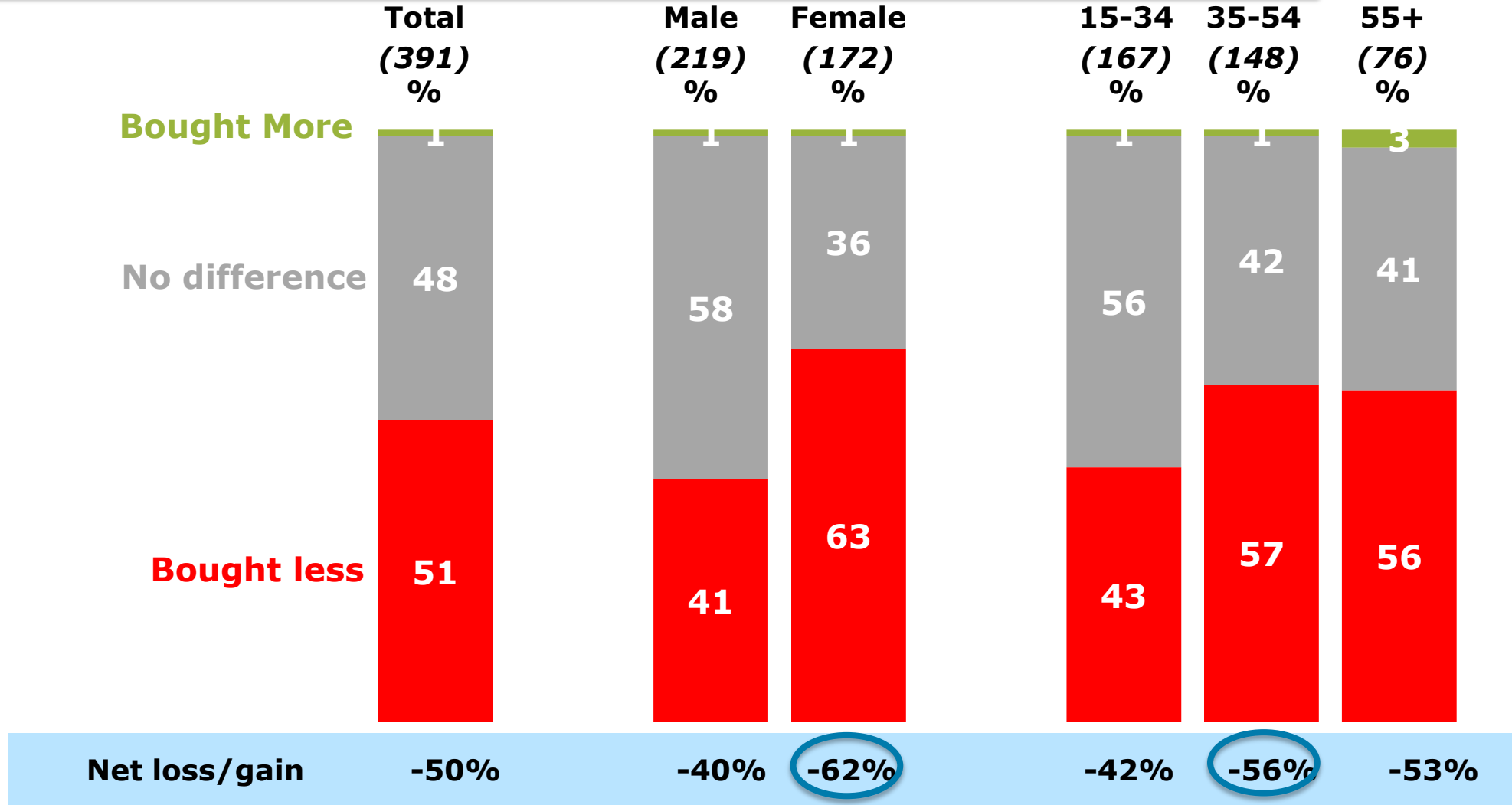
The overall position in population terms is that 1 in 5 purchased fewer frozen burgers from supermarkets, butchers made equal amounts of losses as gains (or equalises itself out) while 1 in 7 reduced their consumption of processed foods containing meat.



Q. How much if at all has this development changed your buying habits in relation to....?

Effect of Horse Meat Scandal in Relation to Buying Frozen Burgers Typically from a Supermarket

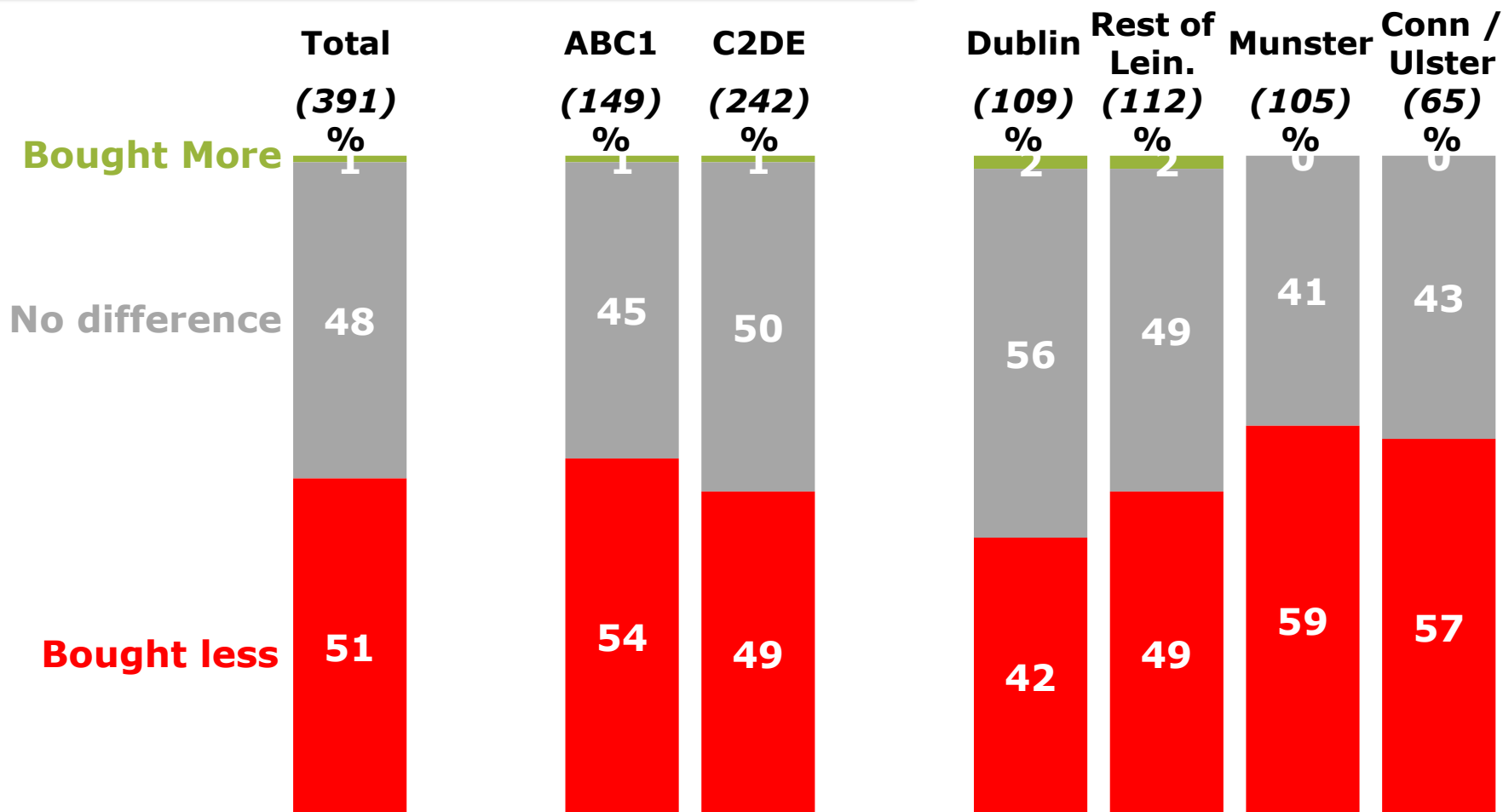
Base: Purchasers only (391 or 41% of pop)



Focussing **exclusively on category purchasers (41% of pop)** highlights the real impact – half of all those who were operating in the frozen burger market reduced their purchasing behaviour. Women in particular and those in their mid age ranges.

Effect of Horse Meat Scandal in Relation to Buying Frozen Burgers Typically from a Supermarket

Base: Purchasers only (391 or 41% of pop)



Net gain/loss

-50%

-53%

-48%

-40%

-47%

-58%

-57%

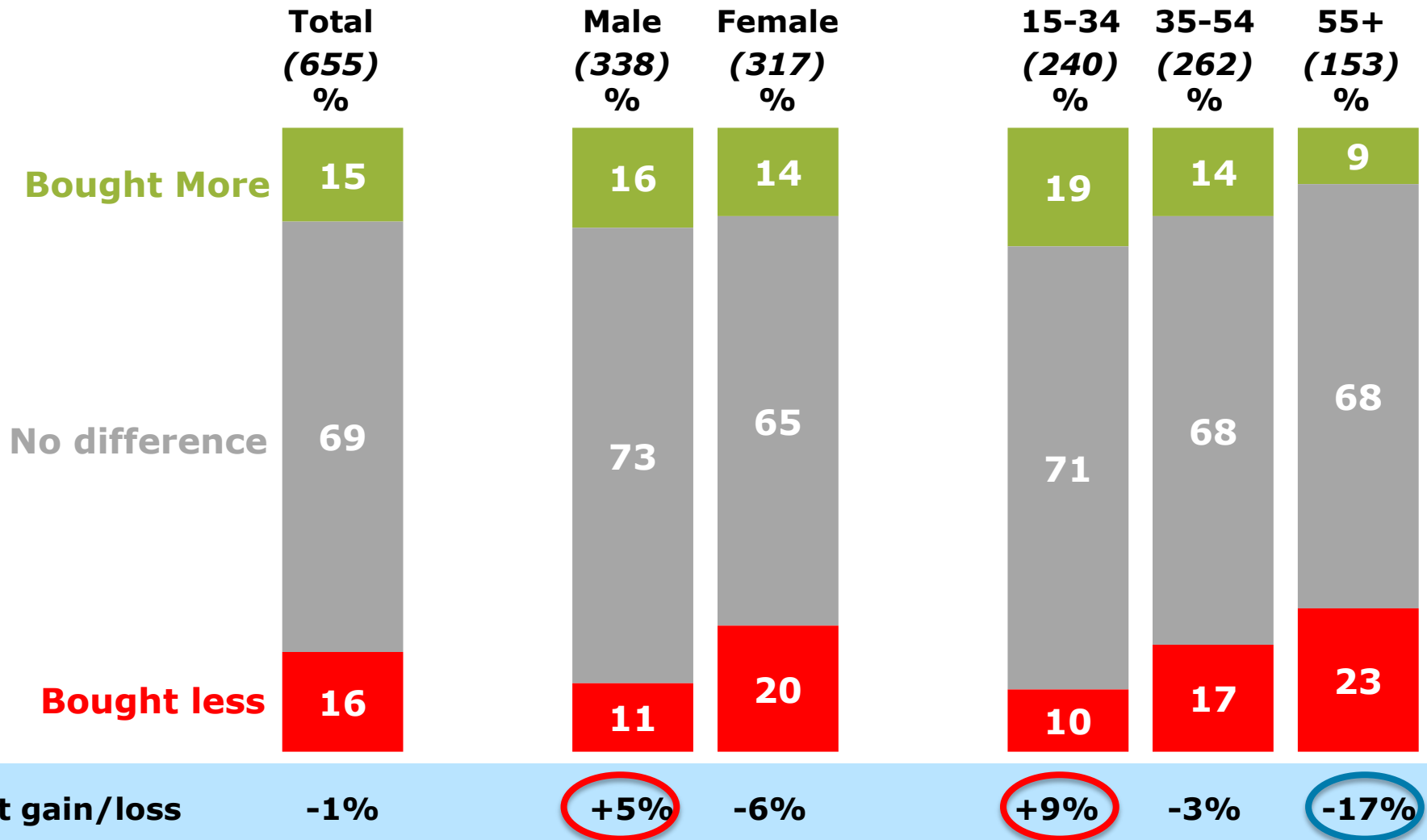
Greater losses evident among middle class adults and those living in Munster and Conn/Ulster – once again when interrogating the data from a purchasers only perspective.



Q. How much if at all has this development changed your buying habits in relation to...Frozen burgers?

Effect of Horse Meat Scandal in Relation to Purchasing Fresh Burgers from a Butcher Counter

Base: Purchasers Only(655 or 68% of pop)



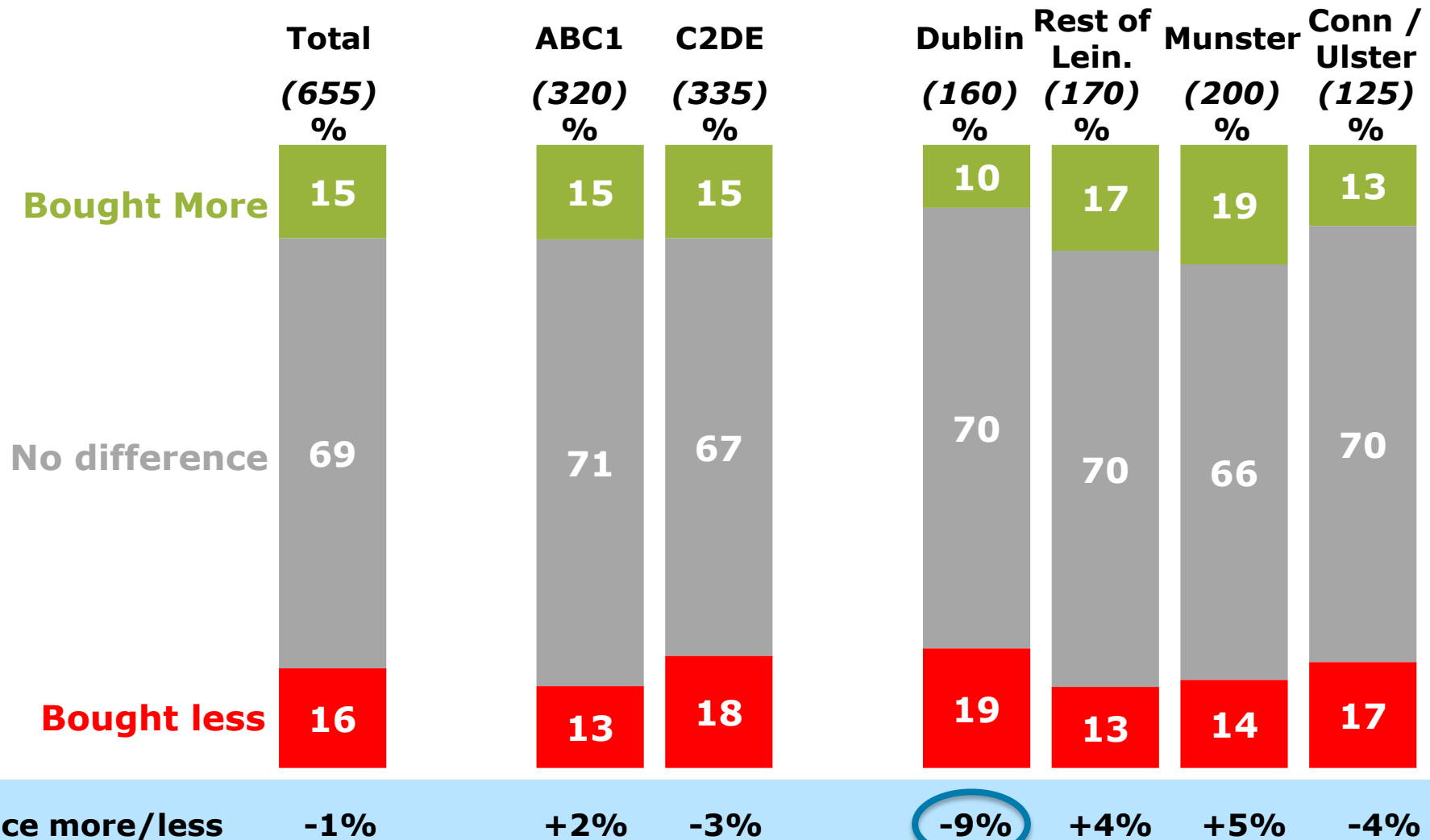
A very different picture emerges with regard to fresh burger purchasing behaviour in butchers. Overall, there was a shift in behaviour but the effect equalises itself. However, within the mix we find men and in particular young adults buying more while women and particularly older adults buying less.-

Q. How much if at all has this development changed your buying habits in relation to...Fresh burgers?



Effect of Horse Meat Scandal in Relation to Purchasing Fresh Burgers from a Butcher Counter

Base: Purchasers only (655 or 68% of pop)



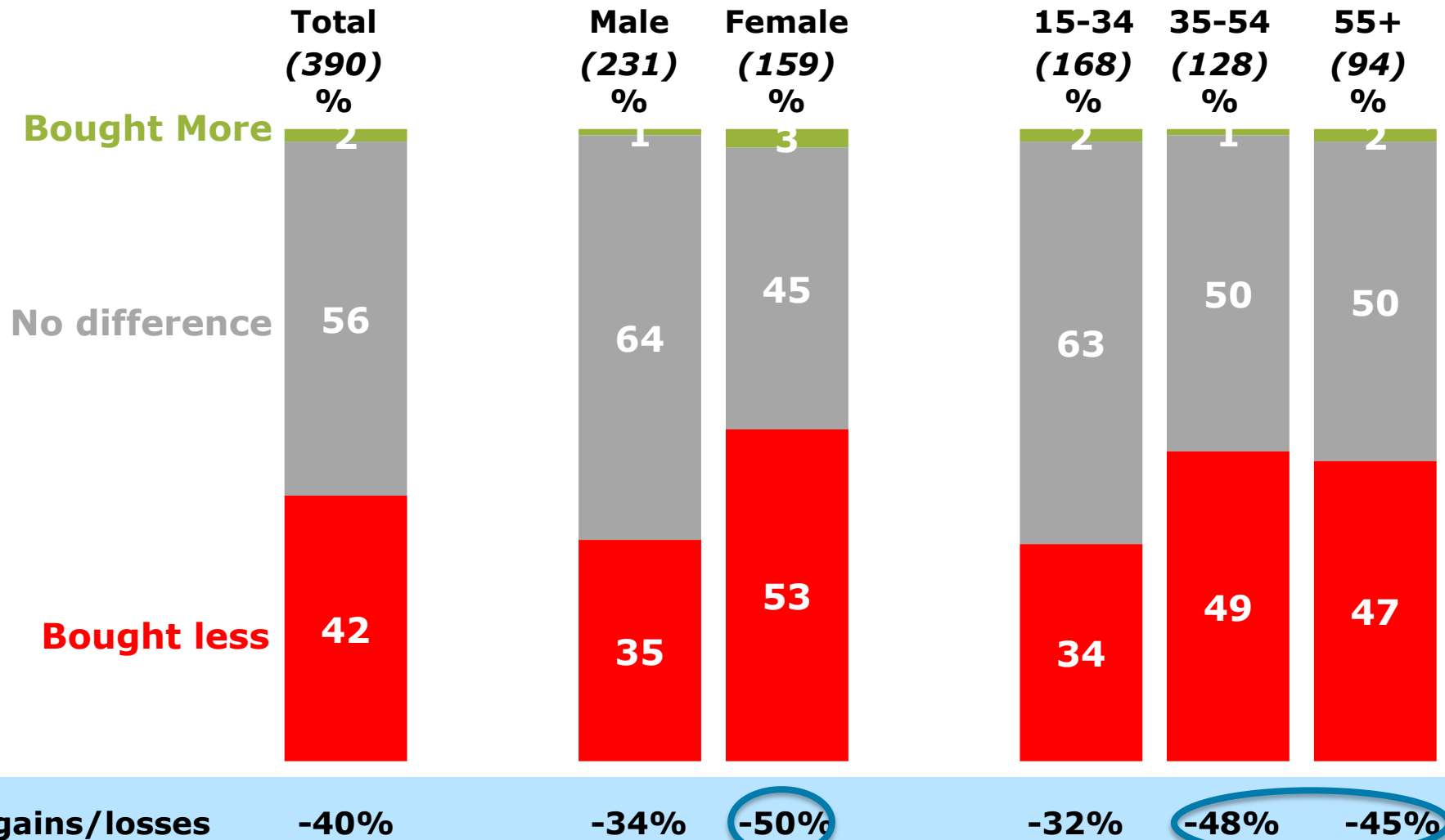
The most significant impact was for Dubliners – who did buy fewer fresh burgers overall from butchers.

Q. How much if at all has this development changed your buying habits in relation to...Fresh burgers?



Effect of Horse Meat Scandal in Relation to Purchasing Processed Foods Containing Meat

Base: Purchasers only (390 or 41% of pop)



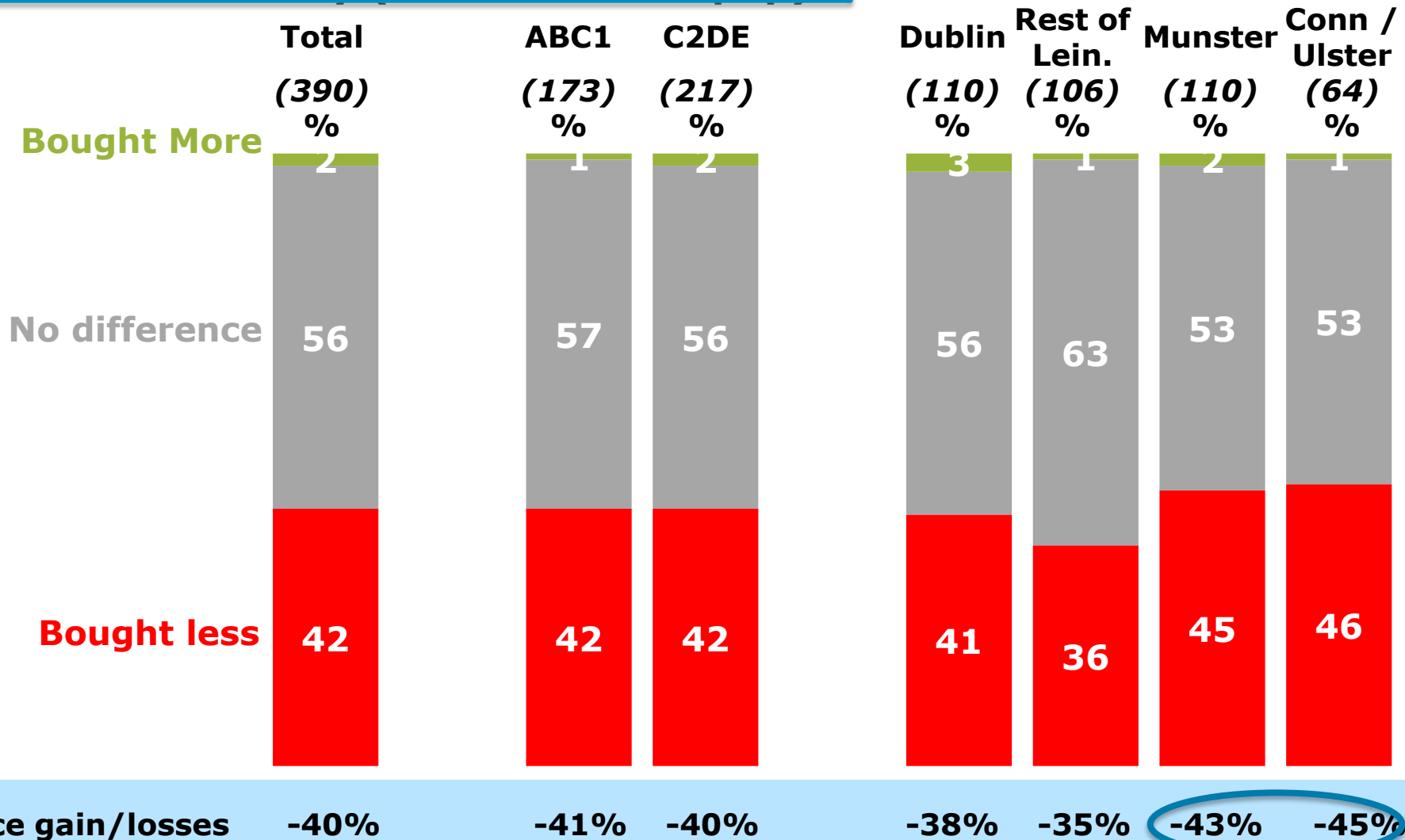
The impact for processed foods was significant among category purchasers—most evident among women and those aged over 35.



Q. How much if at all has this development changed your buying habits in relation to...Processed foods?

Effect of Horse Meat Scandal in Relation to Purchasing Processed Foods Containing Meat

Base: Purchasers only (390 or 41% of pop)




Little difference evident in social class terms but once again Munster and Conn/Ulster most reactive.



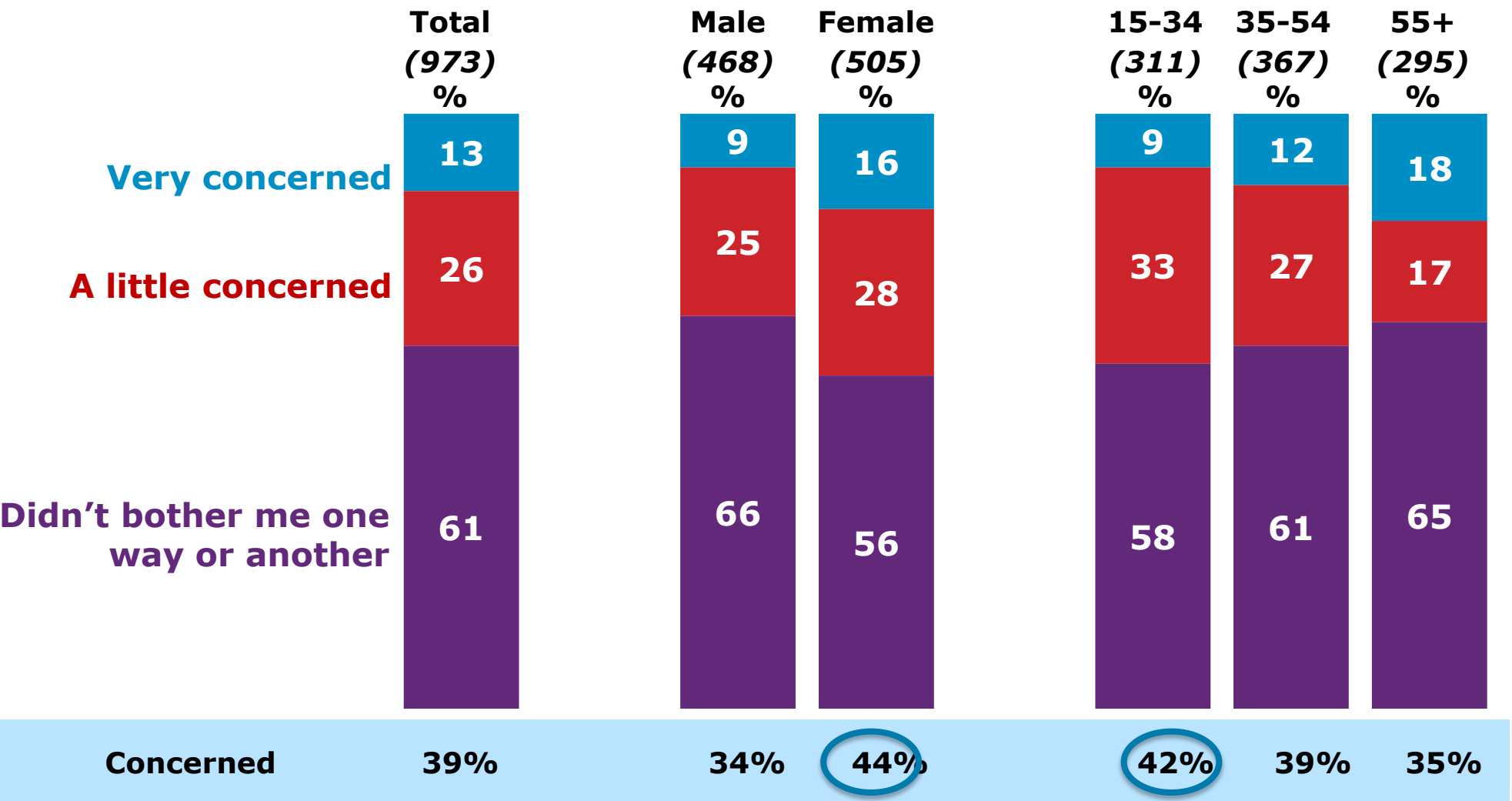
Q. How much if at all has this development changed your buying habits in relation to...Processed food?

4. Concern about horse meat consumption

A large, stylized graphic of a horse's head in shades of blue, positioned on the right side of the slide. The horse is facing left, with its head and neck visible. The graphic is composed of solid blue shapes, creating a modern and abstract representation of the animal.

Level of Concern about Unwittingly having Eaten Horse Meat

Base: All Meat-eaters (n = 973)



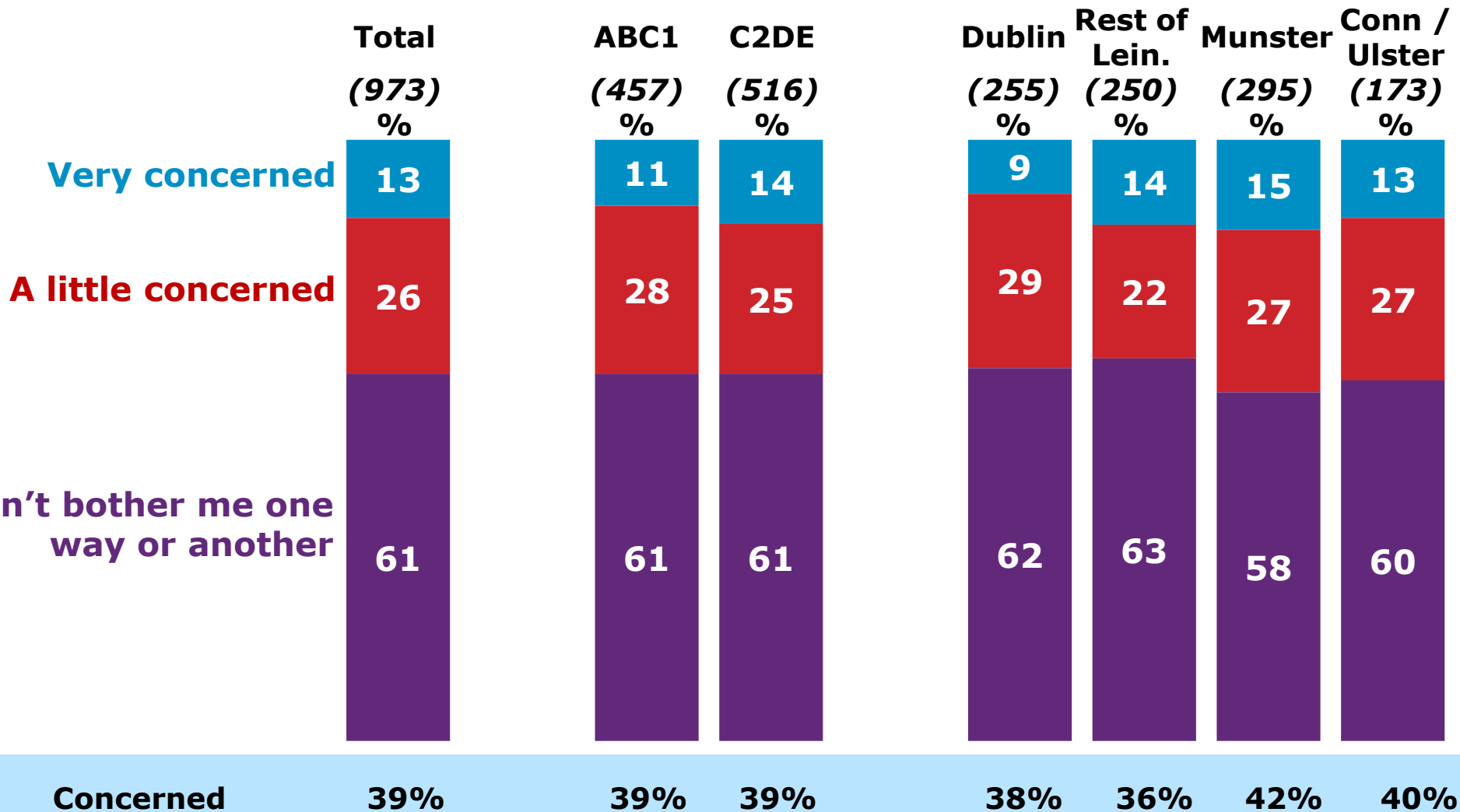
Close on 4 in 10 were concerned – admittedly most 'a little concerned'. Concern highest among women. Those over 55 held the strongest opinions – highest level of 'very concerned' (18%) but also highest level of Not bothered (65%)



Q. As the horse meat incident unfolded, how much concern, if any, did you feel about the idea that you may have unwittingly eaten horse meat?

Level of Concern about Unwittingly having Eaten Horse)

Base: All Meat-eaters (n = 973)



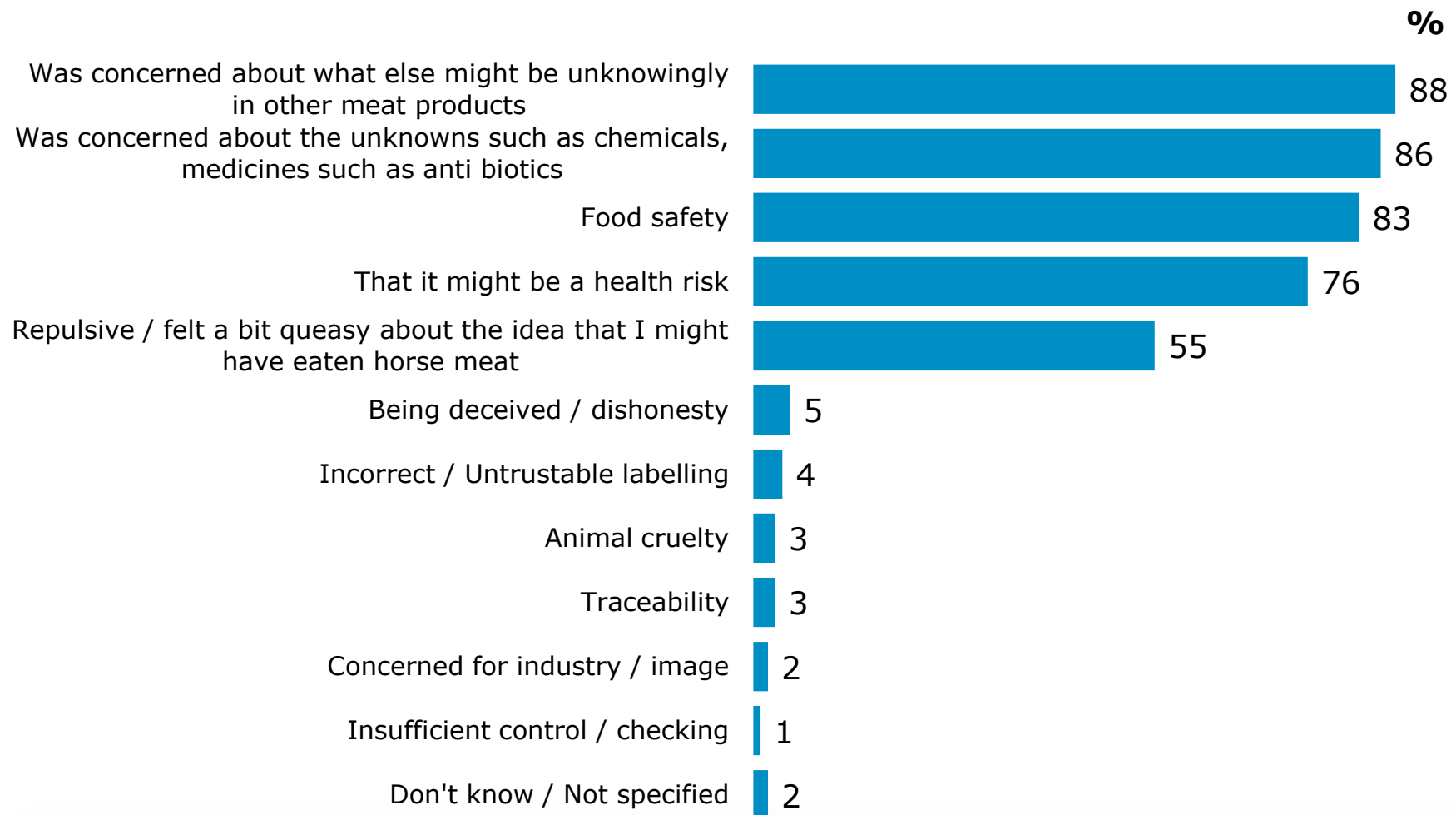
No major differences across social class or region.



Q. As the horse meat incident unfolded, how much concern, if any, did you feel about the idea that you may have unwittingly eaten horse meat?

All Reasons Behind Concern over Possibly Eating Horse Meat

Base: All concerned (n = 379)



Concern about what might unknowingly be in meat products, the unknowns such as chemicals / medicines and overall food safety were the main concerns raised. The health risk was an issue for three quarters of the concerned group



All Reasons Behind Concern over Possibly Eating Horse Meat in Detail

Base: All concerned (n = 379)

	Total	Gender		Social Grade		Region			
		Male	Female	ABC1	C2DE	Dublin	Leinster	Munster	Conn/ Ulster
Base:	379	158	221	176	203	95	92	121	71
	%	%	%	%	%	%	%	%	%
Was concerned about what else might be unknowingly in other meat products	88	83	91	88	88	83	91	88	91
Was concerned about the unknowns such as chemicals/medicines such as anti biotics	86	85	87	86	86	79	89	88	89
Food safety	83	80	86	83	84	78	84	87	85
That it might be a health risk	76	80	74	70	82	74	72	76	88
Repulsive / felt a bit queasy about the idea that I might have eaten horse meat	55	43	63	49	60	49	47	64	56
Being deceived / dishonesty	5	6	4	7	2	5	3	6	3
Incorrect / Untrustworthy labelling	4	4	4	4	4	3	4	4	6
Animal cruelty	3	2	3	3	2	3	4	2	2
Traceability	3	4	2	6	0	1	3	3	4
Concerned for industry / image	2	2	3	3	2	3	1	4	-
Insufficient control / checking	1	1	1	1	0	-	2	-	1
Don't know / Not specified	2	2	1	1	2	3	2	2	-

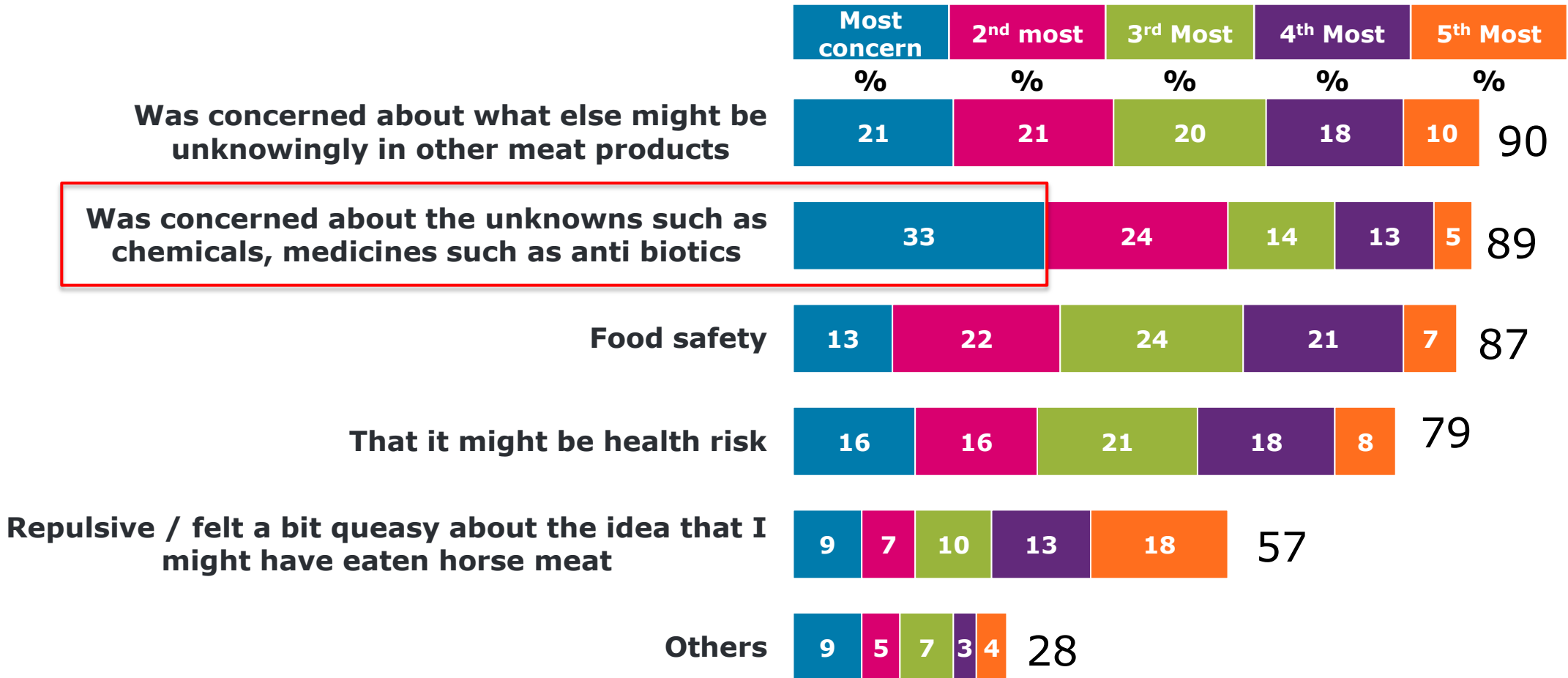
No major difference across demographic cohorts.

Q. Which, if any, of the following reasons were the cause of your concern?



Rank order of concern over Possibly Eating Horse Meat

Base: All concerned (n = 379)



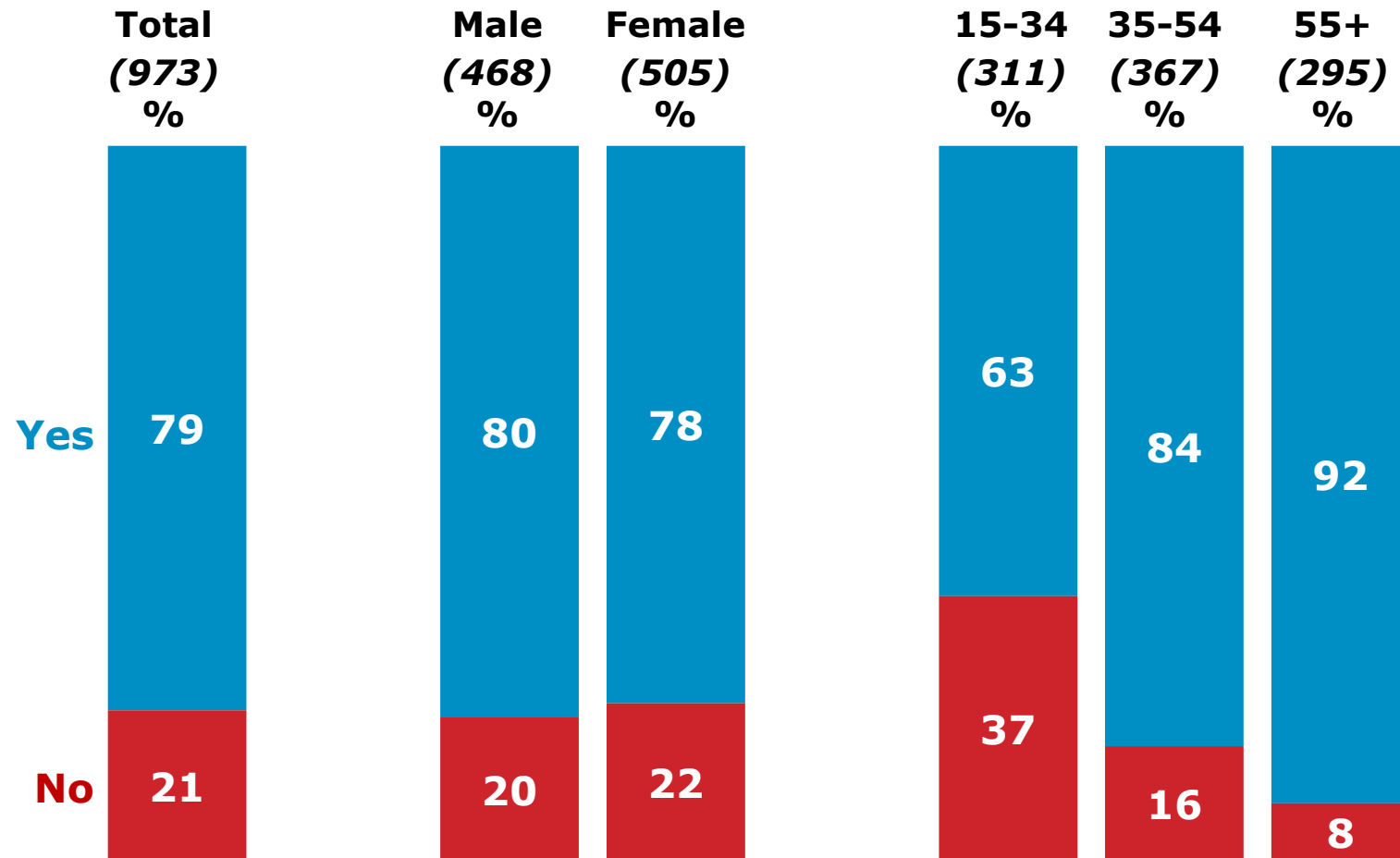
In rank order concerns are (1) unknowns such as anti-biotics, (2) what else might be unknowingly in other meat products, (3) that it might be a health risk and (4) food safety.



**5. Awareness that Ireland
was the first to identify
the horse meat problem**

Awareness of Ireland being the First Country to Identify Horse Meat Traces

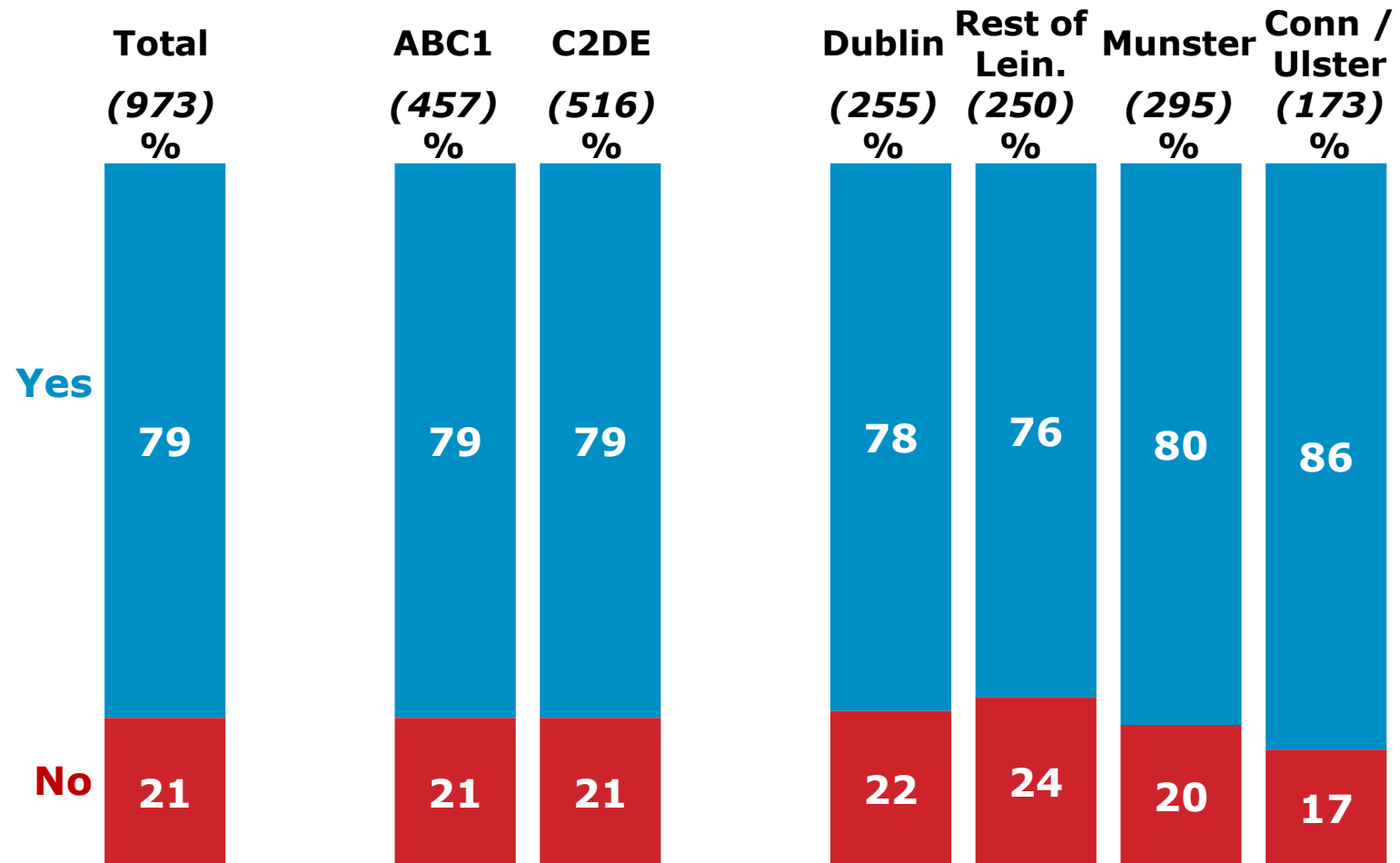
Base: All Meat-eaters (n = 973)



Four in five aware of Ireland being the first country to identify horse meat traces. Awareness is higher in older age groups.

Awareness of Ireland being the First Country to Identify Horse Meat Traces

Base: All Meat-eaters (n = 973)

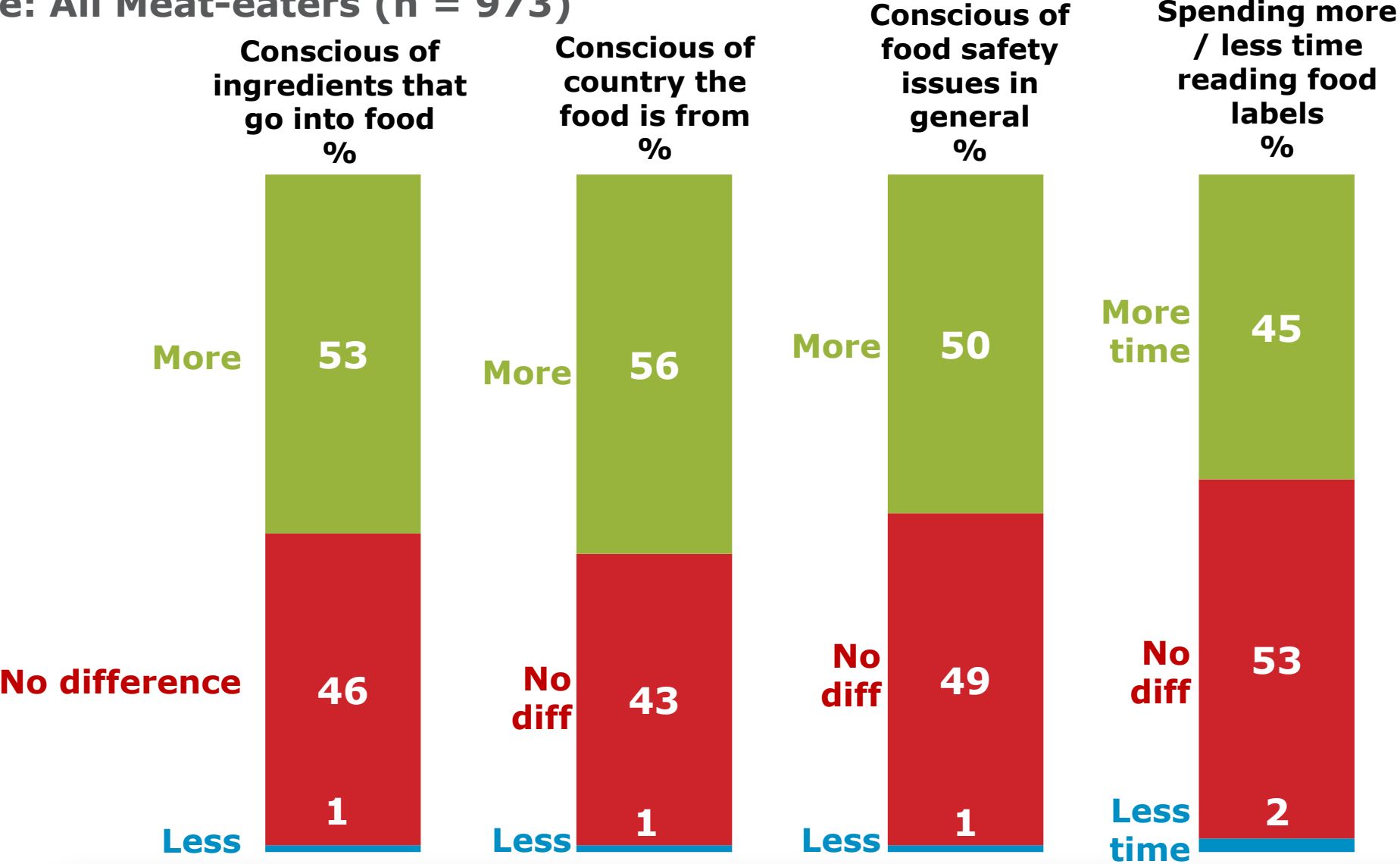


Awareness is slightly higher outside of Leinster

6. Longer term implications of horse meat incident

Impact of Horse Meat Incident on current Purchasing Manufactured Products

Base: All Meat-eaters (n = 973)



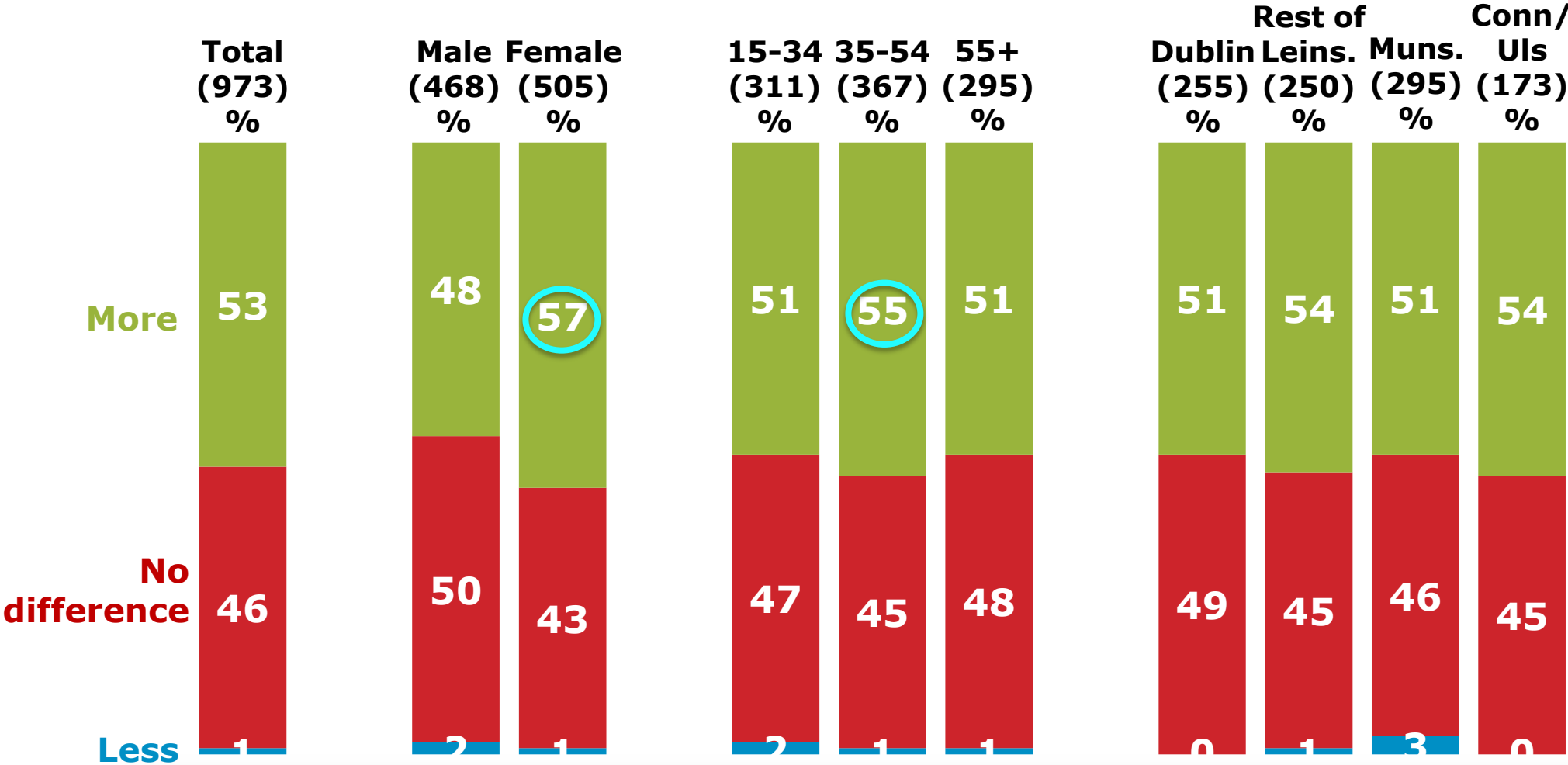
The longer term impact is significant. Half of respondents now claim they are more conscious of ingredients, traceability and general food safety as a result of the horse meat incident.



Q. When you are now buying manufactured products, would you say you are...?

Effect of Horse Meat Incident on Awareness of the Ingredients that go into the Food you Purchase

Base: All Meat-eaters (n = 973)



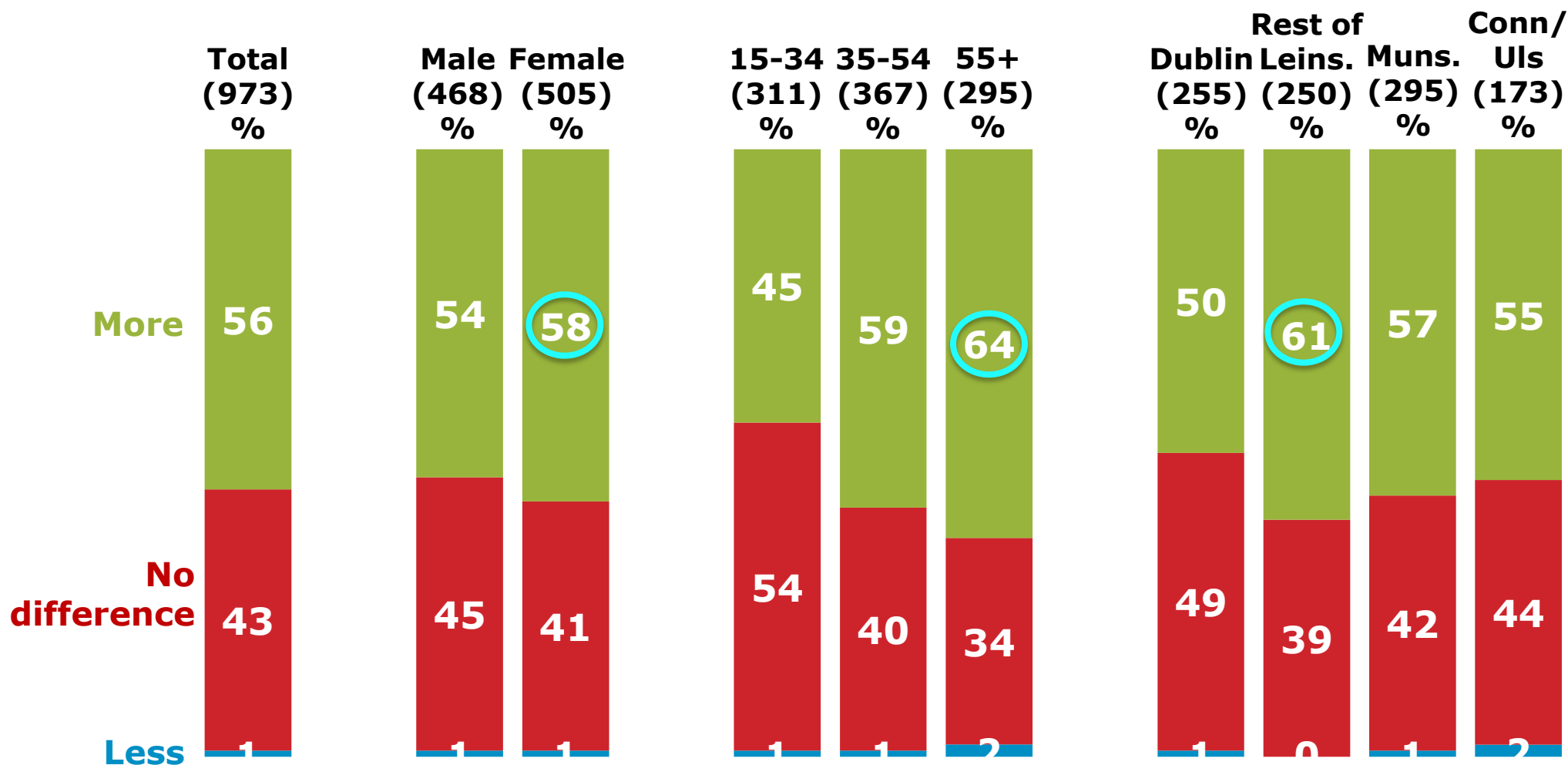
Females and those aged between 35-54 years are more likely to believe they are more conscious of the ingredients going into the manufactured products they buy.



Q. When you are now buying manufactured products, would you say you are...more or less conscious about the ingredients going into food?

Effect of Horse Meat Incident on Awareness of which Country the Food Comes From

Base: All Meat-eaters (n = 973)



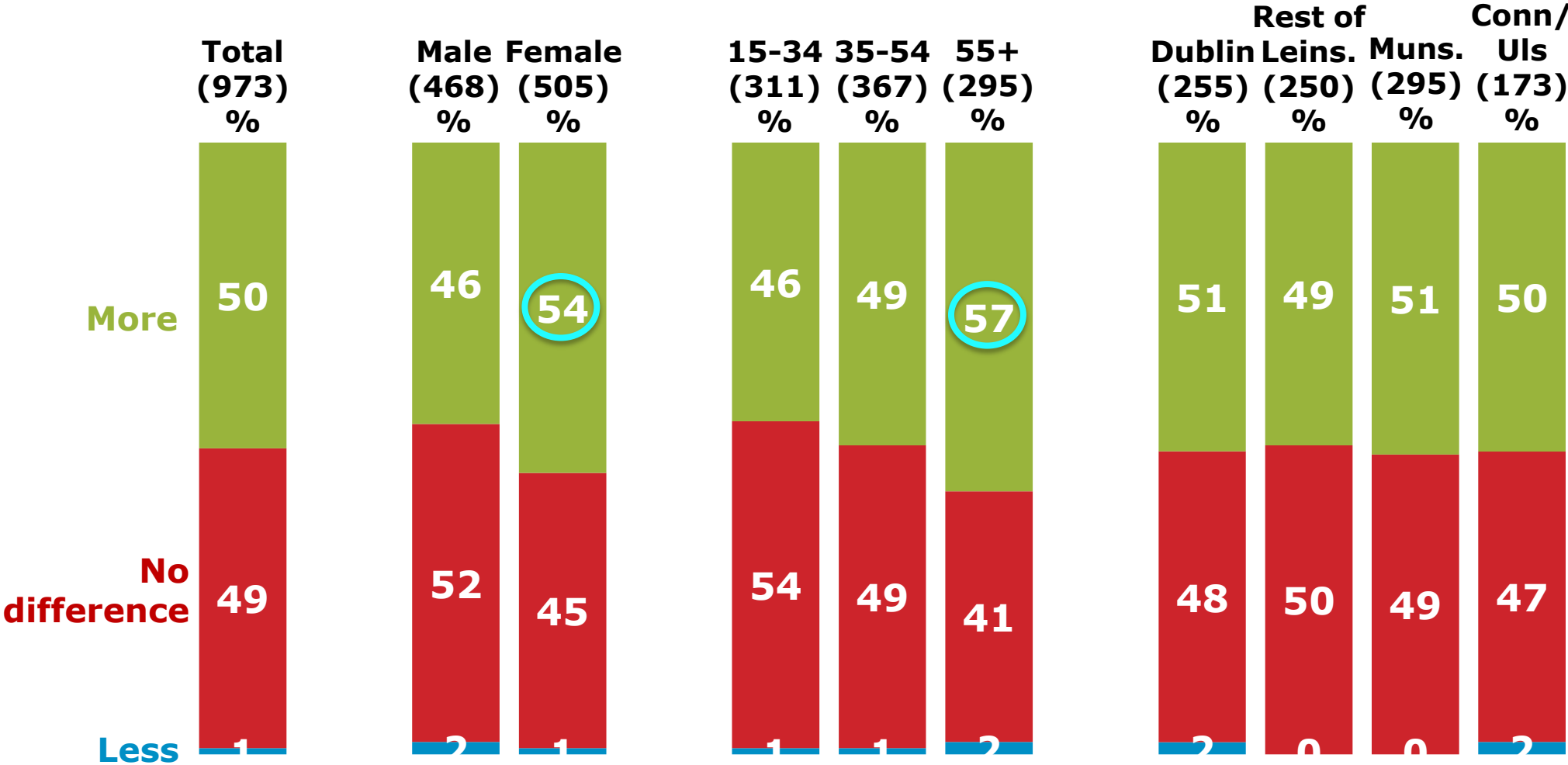
Females, those over 55 and those living in Leinster demonstrate higher levels of interest in knowing about the country of origin of their food.



Q. When you are now buying manufactured products, would you say you are...more or less conscious about which country the food comes from?

Effect of Horse Meat Incident on Food Safety Issues in General

Base: All Meat-eaters (n = 973)



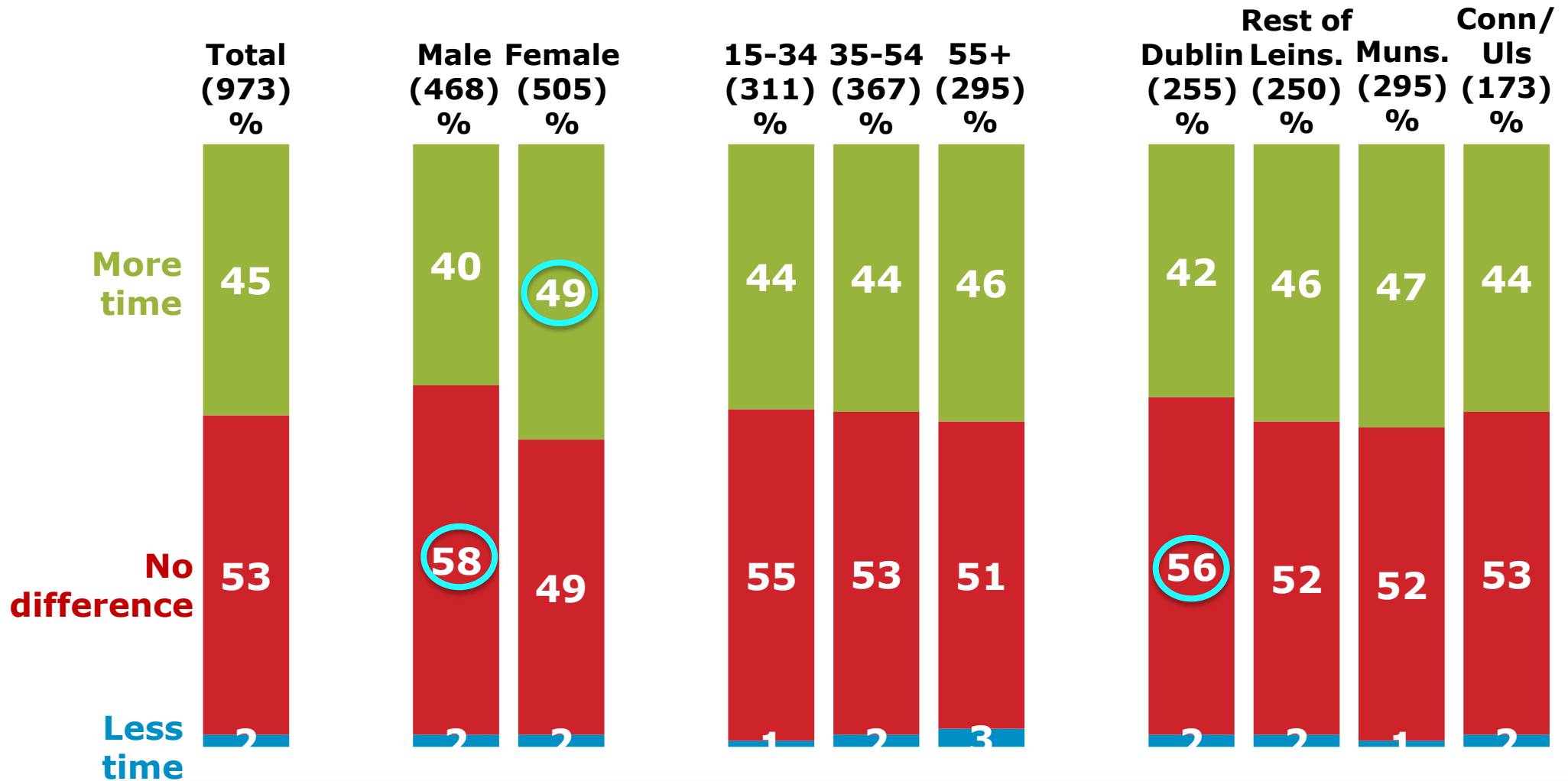
Once again, women and those over 55 believe they are now more conscious of food safety issues in general



Q. When you are now buying manufactured products, would you say you are...more or less conscious about food safety issues in general?

Effect of Horse Meat Incident on Time Spent Reading Labels on Food Products you Purchase

Base: All Meat-eaters (n = 973)



While the impact on label attention is now much higher than before, it is women who are paying most attention to detail.



Q. When you are now buying manufactured products, would you say you are...spending more or less time reading labels on food products you purchase?

Summary of Key Findings

The background features a solid magenta color with several overlapping, rounded, abstract shapes in a lighter pink shade, creating a layered, organic effect.

Summary of key findings

1. Vegetarians?

- Nine in ten respondents describe themselves as eating pretty much everything when it comes to their eating habits.
- Dublin tends to have more exclusive vegetarians, casual vegetarians and vegans.

2. Confidence in Food Safety

- The large majority of adults are confident in Irish food safety controls and regulations. However, only one in five are 'totally confident'.
- Those living in Dublin and Munster have the most confidence in food safety with three quarters saying they are either totally confident or confident in the main.
- Overall, women tend to be marginally less confident than their male counterparts.

Summary of key findings

3. Impact of horse meat incident

- Virtually all adults in the country have heard of the recent horse meat incident.
- The overall position in population terms is that about 1 in 5 purchased fewer frozen burgers from supermarkets (-21%), butchers made equal amounts of losses as gains (or equalises itself out) while 1 in 7 reduced their consumption of processed foods containing meat (-16%).
- Focussing on purchasers of the category highlights the real impact – half of all those who were purchasing frozen burgers in supermarkets reduced their purchasing behaviour. Women even moreso and those in their mid age ranges.
- Greater losses evident among middle class adults and those living in Munster and Conn/Ulster.
- A very different picture emerges with regard to fresh burger purchasing behaviour in butchers. While there was a shift, the balancing effect of those buying more versus those buying less equalised the position. Within the mix we find men and in particular young adults buying more fresh buyers from butchers while women and particularly older adults bought less.

Summary of key findings

3. Impact of horse meat incident

- The most negative significant impact for butchers was in Dublin (-9% among buyers of the category)
- The impact for processed foods among its purchase base was also significant where reductions were most evident among women and those aged over 35.
- Little difference evident in social class terms but once again Munster and Conn/Ulster most reactive in a negative way.

Summary of key findings

4. Concern about horse meat consumption

- Close on 4 in 10 were concerned about the idea that they may have unwittingly eaten horse meat – admittedly most ‘a little concerned’.
- Concern highest among women. Those over 55 held the strongest opinions – highest level of ‘very concerned’ (18%) but also highest level of Not bothered (65%)
- There were no major difference across demographic cohorts on this fro
- In rank order concerns were (1) unknowns in food products such as anti-biotics, (2) what else might be unknowingly in other meat products, (3) was it a health risk and (4) food safety.

Summary of key findings

5. Awareness that Ireland were first to identify problem

- Four in five (80%) aware of Ireland being the first country to identify horse meat traces. Awareness is higher in older age groups (up to 90%).

6. Longer term implications

- The longer term impact is significant. Half of respondents now claim they are more conscious of ingredients, traceability and general food safety as a result of the horse meat incident. Women are more sensitive and on alert.
- For example, women and those aged between 35-54 years are more likely to believe they are now more conscious than ever before of the ingredients going into the manufactured products they buy.
- Women, those over 55 and those living in Leinster demonstrate higher levels of interest in knowing about the country of origin of their food and to be more conscious of food safety issues in general.
- While the impact on attention to labelling is now much higher than before, it is women who claim are paying most attention to the detail.

Thank You



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