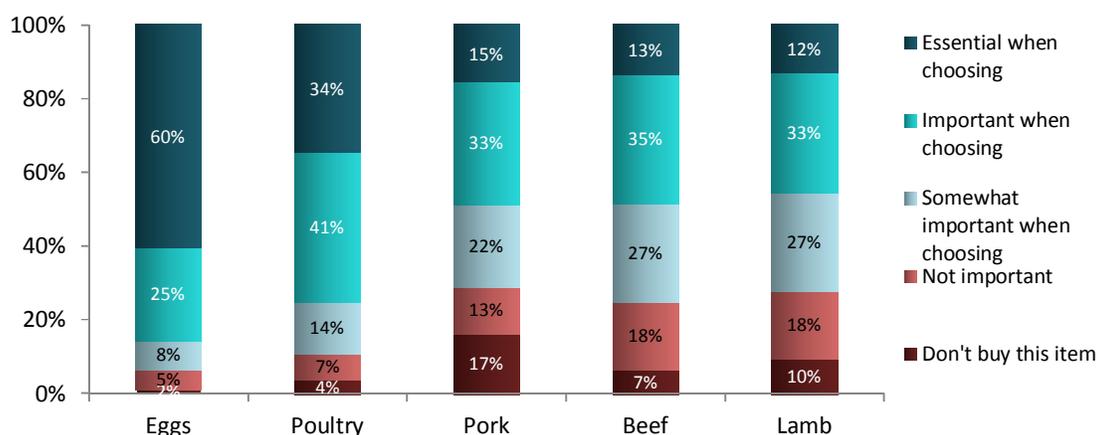


CHOICE Survey on Consumer Expectations of Free Range Egg Labelling Key Findings Report - May 2012

900 CHOICE members completed an online survey on free range products between 23 April 2012 and 4 May 2012. Participation was limited to those responsible for buying and/or choosing the food for their household. Within the key demographic categories of gender, age and location, the sample contains representation across all groups. This report summarises the key survey findings about consumer expectations of free range egg labelling.

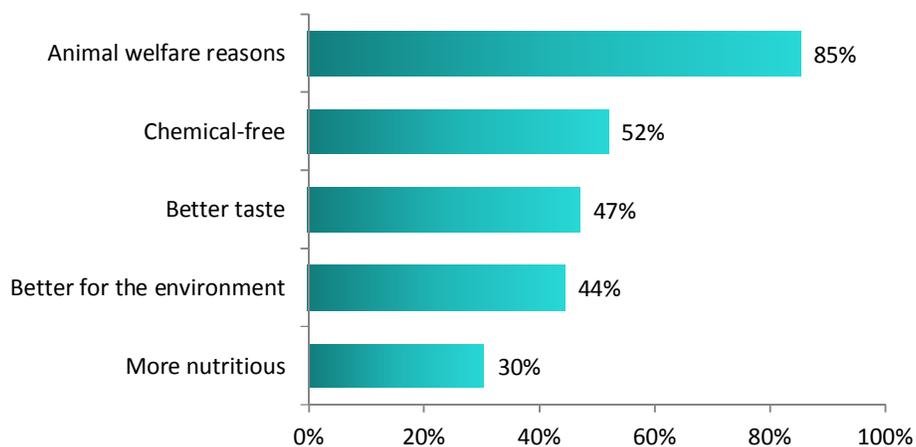
How important is buying free range to consumers – and for what products?

- 93% of participants had chosen free range products in the previous 12 months
- Participants said buying free range was important across a number of products
- Compared with other categories, buying free range was essential for the greatest number of participants when it came to eggs, followed by poultry
- Smaller numbers said it was essential to buy free range pork, beef and lamb although the majority of participants still thought it was important



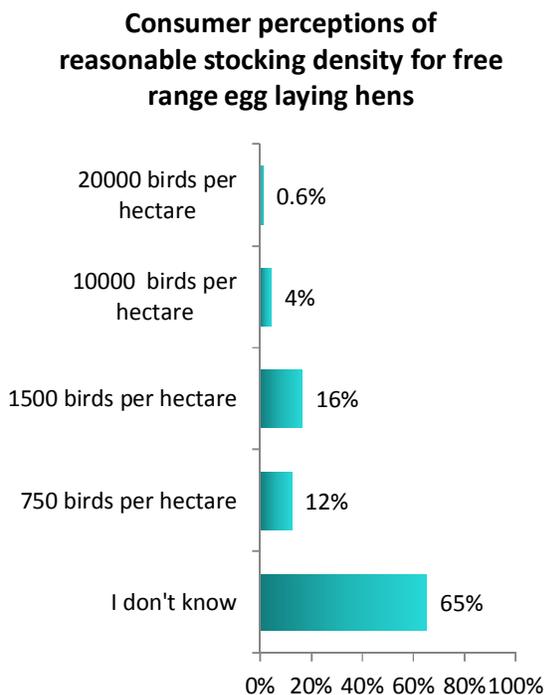
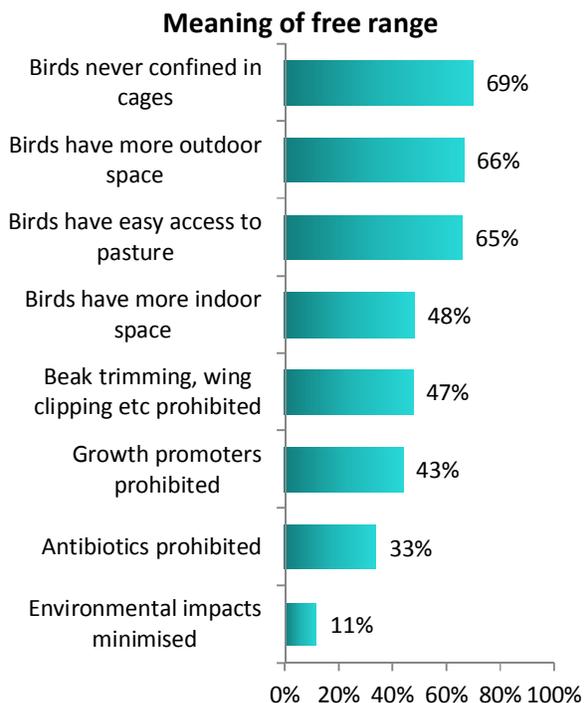
What are consumers' motivations for choosing free range?

- Animal welfare was overwhelmingly the most popular most popular reason for choosing free range products, with 85% of participants selecting this reason



What are consumers' expectations of free range eggs?

- The most popular descriptions of what free range meant to participants concerned the ability of birds to move around and access the outdoors
- There was considerable support for setting a maximum number of birds outdoors to give birds more space
- The majority of participants said they did not know what that maximum number of birds should be.
- Among those participants who selected a maximum outdoor stocking density, there was almost no support for a maximum of 20,000 birds per hectare, with significantly lower limits preferred



How do consumers select free range eggs and are they willing to pay more?

- 43% of participants rely solely on seeing the words 'free range'
- 39% want to see the logo of a free range certification body
- Just 4% of participants were not prepared to pay more for free range eggs
- The majority of participants said they would pay a premium of between \$3 and \$5 more for free range eggs

What do consumers look for on pack to tell them eggs are free range

