



Animal Welfare Institute

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CONSUMER PERCEPTIONS OF FARM ANIMAL WELFARE

Americans care about how farm animals are raised

- In a survey commissioned by the U.S. Farmers and Ranchers Alliance, 70% of consumers said their food purchasing decisions are influenced by how food is grown or raised, and 72% said they think about this during grocery shopping trips.

—Smith R, *Consumers Act on Perception*, Feedstuffs FoodLink, Oct 7, 2011.

<http://feedstuffsfoodlink.com/ME2/dirmod.asp?sid=&nm=&type=news&mod=News&mid=9A02E3B96F2A415ABC72CB5F516B4C10&tier=3&nid=8804BB99569C47C7AC6E5DBC18BA3809> Accessed Oct 20, 2011.

- Technomic's food industry trend tracking survey has documented that humane animal treatment is of increasing importance to consumers, with more than 50% now saying this is an important issue to them.

—Center of the Plate: Poultry Consumer Trend Report, Technomic, May 2011.

http://www.technomic.com/Reports_and_Newsletters/Consumer_Trend_Reports/dyn_PubLoad.php?plD=21 Accessed Oct 20, 2011.

- When consumers in a February 2010 survey by Demeter Communications were asked what they would "like to know from farmers about food production that you currently do not know?" 68% said they wanted to know what farmers are doing to ensure animal care. The food label is a preferred source of food information for 80% of the surveyed shoppers.

—*What "Indicator Consumers" Want to Know Most about How U.S. Foods are Produced*, Demeter

Communications, April 2010. [http://demetercommunications.com/wp-](http://demetercommunications.com/wp-content/uploads/2011/05/FINAL.Demeter.SegemenTrak.Full_Report.June2010.pdf)

[content/uploads/2011/05/FINAL.Demeter.SegemenTrak.Full_Report.June2010.pdf](http://demetercommunications.com/wp-content/uploads/2011/05/FINAL.Demeter.SegemenTrak.Full_Report.June2010.pdf) Accessed Oct 20, 2011.

- Animal welfare was cited as an issue of concern by a majority of respondents to a survey on restaurant social responsibility conducted in 2007. It was noted that animal welfare was the highest rated food-related issue, above locally-sourced foods and the offering of organic foods.

—*Market Brief: Tracking and Interpreting Chain Restaurant Trends*, Technomic Inc., July 2007.

http://www.customerconnectireland.com/resources/amexMarketbrief_9-07%5B1%5D%20Copy.pdf

Accessed Oct 20, 2011.

- Ninety-five percent of respondents to a nationwide telephone survey conducted by Oklahoma State University agreed with the statement, "It is important to me that animals on farms are well cared for."

—Prickett RW, et al, *Consumer Perceptions for Farm Animal Welfare: Results of a Nationwide Telephone Survey*, Oklahoma State University, Department of Agricultural Economics, 2007.

<http://asp.okstate.edu/baileynorwood/Survey4/files/Robspaper.pdf> Accessed Oct 20, 2011.

- In a 2004 survey conducted by researchers at The Ohio State University, 92% of Ohioans agreed that it is important that farm animals are well-cared for, and 81% said the well-being of farm animals is just as important as the well-being of pets.
— Rauch A & Sharp JS, *Ohioans Attitudes about Animal Welfare*, The Ohio State University, Social Responsibility Initiative, January 2005. http://ohiosurvey.osu.edu/pdf/2004_Animal_report.pdf Accessed Oct 20, 2011.

Consumers support regulating farm animal care

- Research on mandatory labeling of animal welfare practices, conducted by university professors from Kansas State University and Michigan State University, found that 61.7% of survey respondents favored mandatory labeling of pork produced on farms using gestation crates, and 62.0% said they supported mandatory labeling of eggs produced using cages for laying hens. The researchers estimated that the typical U.S. shopper was willing to pay 20% higher prices for pork and egg products to obtain this type of mandatory labeling information.
—Tonsor GT & Wolf CA, *Mandatory Labeling of Animal Welfare Attributes*, Kansas State University, Department of Agricultural Economics, July 2011.
http://www.agmanager.info/livestock/marketing/animalwelfare/AW-Labeling_FactSheet_07-19-11.pdf. Accessed Oct 20, 2011.
- In a survey conducted by agricultural economists at Oklahoma State University, approximately half of the respondents said they believe government should “force all food companies to indicate the level of animal care on their product labels.” Also, banning eggs produced under inferior animal care standards, even if eggs produced under higher welfare standards were readily available, was supported by 69% of those respondents who had an opinion on the issue.
—Norwood FB & Lusk JL, *Compassion by the Pound: The Economics of Farm Animal Welfare*, Oxford University Press, 2011, pp. 341-2.
- The welfare and protection of animals raised for food was seen as very or somewhat important by 79% of respondents to a survey managed by the Humane Research Council in June 2008. A large majority (73%) would support a law requiring that farm animals, including pigs, cows and chickens, are provided with enough space to behave naturally.
—*Animal Tracker – Wave 1, An HRC-Managed Research Study*, Humane Research Council, June 2008.
<http://www.humanespot.org> Accessed Oct 20, 2011.
- Fifty-eight percent of Americans said they were very or somewhat concerned about the treatment of farm animals in a 2003 poll by Zogby International. Enacting laws to protect farm animals from cruelty was supported by 82% of those surveyed.
—*Nationwide Views on the Treatment of Farm Animals*, Zogby International for the Animal Welfare Trust, 2003. <http://civileats.com/wp-content/uploads/2009/09/AWT-final-poll-report-10-22.pdf> Accessed Oct 20, 2011.

“Humanely raised” is an important food claim

- In a survey on the welfare of chickens raised for meat commissioned by the Animal Welfare Institute, 70% of all respondents, and 77% of frequent chicken meat shoppers, indicated they thought the claim “humanely raised” on a package of chicken meant that the animal was raised under a standard of care better than typical industry practice.

—*U.S. Poll on the Welfare of Chickens Raised for Meat*, Animal Welfare Institute, April 2010.

[http://67.227.178.42/sites/default/files/uploads/legacy-uploads/documents/FA-](http://67.227.178.42/sites/default/files/uploads/legacy-uploads/documents/FA-HumanelyRaisedCagedFreeSurvey-081110-1281725036-document-23248.pdf)

[HumanelyRaisedCagedFreeSurvey-081110-1281725036-document-23248.pdf](http://67.227.178.42/sites/default/files/uploads/legacy-uploads/documents/FA-HumanelyRaisedCagedFreeSurvey-081110-1281725036-document-23248.pdf). Accessed Oct 20, 2011.

- Fifty-one percent of consumers said the claim “humanely raised” was very important or important in causing them to believe a food is ethically produced. Of the 29 food claims studied, “humanely raised” ranked fourth highest, above “no antibiotics,” “produced in the USA,” “natural,” and “sustainably produced.”

—*Ethical Food: A Research Report on the Ethical Claims that Matter Most to Food Shoppers and How Ethical Concerns Influence Food Purchases*, Context Marketing, March 2010.

<http://www.contextmarketing.com/sources/feb28-2010/ethicalfoodreport.pdf>. Accessed Oct 20, 2011.

- When asked to identify their top three reasons for purchasing “natural” or “organic” meat, 38% of respondents to an online poll conducted by the American Meat Institute and the Food Marketing Institute chose “better health and treatment of the animal.” Animal treatment ranked third highest among nine meat selection criteria, above “freshness,” “better taste,” and “environmental impact.”

—Top 3 Reasons for Purchasing Natural or Organic Meat, *Beyond the Farm Gate*, Whole Foods Market, Issue 4, June 2010.

- In a national poll conducted by Harris Interactive for the World Society for the Protection of Animals, 58% of respondents indicated it is important to them to be able to purchase humanely labeled meat and eggs in their local supermarket, and approximately one-quarter of the sample said they had bought “organic” or “free range” animal products in the previous year.

—*Finding Animal Friendly Food: The Availability of Humanely Labeled Foods in U.S. Grocery Stores*, World Society for the Protection of Animals, Boston, MA, 2009.

- In a survey conducted for the International Dairy-Deli-Bakery Association, 55% of American consumers who were aware of the “humane treatment” food claim felt that the claim was very or somewhat important. Of 19 claims studied, only two (“locally raised or grown” and “antioxidants”) were seen by aware shoppers as being more important than “humane treatment certified.”

—*Health & Wellness: The Purpose-Driven Consumer* (Executive Summary), International Dairy-Deli-Bakery Association, 2008, http://www.iddba.org/store/pdfs/ES_health.pdf. Accessed Oct 20, 2011.

- Consumers responding to a 2007 Public Opinion Strategies survey ranked the “humanely raised” label as the most important food label, over “organic” and “natural.”

—*Frequently Asked Questions*, The Humane Touch, American Humane Association.

<http://thehumanetouch.org/faq>. Accessed Oct 20, 2011.

- Of more than 1,000 respondents to a 2007 Oklahoma State University survey, 52% said personal food choices have a large impact on the well-being of farm animals, and 49% said they consider the well-being of farm animals when they make food purchasing decisions.
—Prickett RW, et al, *Consumer Perceptions for Farm Animal Welfare: Results of a Nationwide Telephone Survey*, Oklahoma State University, Department of Agricultural Economics, 2007.
<http://asp.okstate.edu/baileynorwood/Survey4/files/Robspaper.pdf> Accessed Oct 20, 2011.
- In a 2005 survey of Michigan residents conducted by researchers at Michigan State University, 92% of respondents rated “humane animal treatment” as “very important” or “somewhat important” as a factor when purchasing animal products. Humane treatment was rated as significantly more important than factors having to do with where the animal was raised or by whom.
—Conner DS, et al, *Consumer Preferences for Pasture-Raised Animal Products: Results from Michigan*, *Journal of Food Distribution Research* 39(2):12-25.
- When University of California, Santa Cruz, researchers asked central California shoppers to evaluate five potential food label claims, “humane” was most often the top-ranked choice, above “locally grown,” “living wage,” “U.S. grown,” and “small-scale farm.” Product labels were a preferred source of food information for 81% of the consumers.
—*What Do People Want to Know About Their Food?*, University of California, Santa Cruz, Research Brief #5, Winter 2005. <http://escholarship.org/uc/item/75s222dm> Accessed Oct 20, 2011.

Consumers are willing to pay more for food that is “humanely raised”

- Fifty-seven percent of consumers responding to a Context Marketing survey said they would be willing to pay 1% to 10% more “for food that promises to be produced to higher ethical standards.” Twelve percent were willing to pay 10% more.
—*Ethical Food: A Research Report on the Ethical Claims that Matter Most to Food Shoppers and How Ethical Concerns Influence Food Purchases*, Context Marketing, March 2010.
<http://www.contextmarketing.com/sources/feb28-2010/ethicalfoodreport.pdf> Accessed Oct 20, 2011.
- A 2007 survey by Public Opinion Strategies found that 58% of consumers would spend an additional 10% or more for meat, poultry, eggs, or dairy products labeled as “humanely raised.”
—*Frequently Asked Questions*, The Humane Touch, American Humane Association.
<http://thehumanetouch.org/faq> Accessed Oct 20, 2011.
- In a survey by The Ohio State University, 59% of Ohioans said they would be willing to pay more for meat, poultry, or dairy labeled as coming from humanely treated animals. Among those, 43% said they would pay 10% more, and 12% said they would pay 25% more.
—Rauch A & Sharp JS, *Ohioans Attitudes about Animal Welfare*, The Ohio State University, Social Responsibility Initiative, January 2005. http://ohiosurvey.osu.edu/pdf/2004_Animal_report.pdf Accessed Oct 20, 2011.
- Consumer surveys by the Animal Agriculture Alliance in 1993, 1998, and 2004 demonstrated that American shoppers are willing to pay more for food labeled “humanely raised.” In

2004, 31% of respondents were willing to pay 5% more, while 23% were willing to pay 10% more.

—*Consumer Attitudes about Animal Welfare: 2004 National Public Opinion Survey*, Animal Agriculture Alliance and National Corn Growers Association, April 2004.

http://www.animalagriculturealliance.org/images/ag_insert/2004_Pub_Op_PR.ppt. Accessed Oct 20, 2011.

- Eighty-one percent of U.S. respondents to a Zogby International poll would be willing to pay more for eggs from chickens raised in a humane manner.

—*U.S. Public Supports Humane Treatment for Hens*, Zogby International for Farm Sanctuary, September 2000.

<http://www.isecruelty.com/poll.php>. Accessed Oct 20, 2011.

- Forty-four percent of a sample of 1,000 Americans, surveyed in 1998, said they would try a “humanely raised” product if the cost was 5% more, while 20% would try the product if it was 10% more.

—*American Attitudes towards Farmers and Farm Animal Issues*, Opinion Dynamics for the Animal Industry Foundation, Arlington, VA, 1998.

Certain food labels confuse and mislead shoppers

- Only two percent of more than 2,000 Americans responding to a Harris Interactive Poll conducted for the Animal Welfare Institute were able to correctly identify the definition of “natural” when used on meat and poultry. Fifty-one percent mistakenly thought “natural” meant the product came from animals who were not administered hormones or antibiotics. Seventy-one percent of the sample strongly or somewhat agreed that having both a “natural” and a “naturally-raised” label, where the labels have different meanings, could be confusing to consumers.

—Natural labeling poll, Harris Interactive QuickQuery for the Animal Welfare Institute, October 2009.

- When Consumer Reports asked what consumers thought a “naturally raised” label on a meat product should mean, 85% said that the product came from an animal raised in a natural environment, 77% said it came from an animal that had access to the outdoors, and 76% said the label meant the animal had been treated humanely. (“Naturally raised” actually means the animal was not given antibiotics or hormones and was fed a vegetarian diet. The claim does not describe the housing or treatment of animals.)

—*Food-Labeling Poll 2008*, Consumer Reports, November 2008.

<http://www.greenerchoices.org/pdf/foodpoll2008.pdf>. Accessed Oct 20, 2011.

- Eighty-three percent of respondents to a 2007 food labeling poll by Consumer Reports said that the “natural” label on meat should mean “it came from an animal that was raised in a natural environment.” (The “natural” claim indicates a product is minimally processed and has no artificial ingredients; the claim has no relevance to how the animals were raised or treated.)

—*Food Labeling Poll*, Consumer Reports, July 2007. [http://greenerchoices.org/pdf/Food%20Labeling%20Poll-](http://greenerchoices.org/pdf/Food%20Labeling%20Poll-final_rev.pdf)

[final_rev.pdf](http://greenerchoices.org/pdf/Food%20Labeling%20Poll-final_rev.pdf). Accessed Oct 20, 2011.

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