

# Opinions Regarding Farmed Animals

## An HRC Research Primer



### **Report in Brief**

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This primer summarizes the available research regarding public attitudes toward farmed animals, with emphasis on the United States.

### **The Bottom Line**

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Approximately 10 billion land-based animals are killed for food each year in the United States. However, there is significant and growing public awareness and support for improved farmed animal welfare conditions. Public opinion research studies find substantial concern for farmed animals, as well as a willingness of consumers to act upon these concerns. Additionally, depending on the study, from 10% to over 50% of consumers are willing to pay higher prices for more “humanely” raised and slaughtered animal products.

### **How to Use this Information**

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An understanding of consumer psychology and sentiment toward farmed animals is critical in forming strategies to bring about reforms for those animals. Studying public opinion on the topic allows advocates to more deeply understand the nuances of consumer attitudes and develop more targeted and effective campaigns. The findings may also be used by vegetarian advocates who appeal to compassion for farmed animals.

### **HRC Information**

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The Humane Research Council (HRC) is a nonprofit organization dedicated to maximizing the effectiveness of animal advocates using professional, cost-efficient, and informative consumer and market research methods.

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## Introduction and Overview

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Every year, approximately 10 billion land-based animals in the U.S. are killed for the purpose of food production to feed more than 300 million people (in addition to exports). This does not include the billions of aquatic animals killed each year in the U.S., including fish and shellfish, as well as the “bycatch” from commercial fishing. In the U.S. and elsewhere, nearly everyone consumes animal products; only an estimated 1-3% of U.S. adults abstain from meat and other animal products (for additional detail, see HRC Primer, *How Many Vegetarians Are There?*: <http://www.humanespot.org/node/2684>). In recent years, there has been a reduction in the number of farmed animals killed for food. In 2008, 10.3 billion farmed animals were killed for food, whereas in 2009, 9.6 billion were killed.

To meet the demand for animal products, large-scale farms use production line factory principles to raise animals for food, resulting in a practice termed “factory farming.” These techniques allow farmers and ranchers to raise greater numbers of animals in smaller spaces, almost always at the expense of the animals’ welfare and living conditions. As knowledge and awareness of factory farming increases among the public, more consumers are expressing opposition to the industry, based on animal welfare concerns. However, the extent to which consumers oppose animal farming varies considerably. In this primer, HRC explores the diverse viewpoints unearthed by public opinion research among representative samples of people in the United States and elsewhere.

## Basic Attitudes toward Farmed Animal Welfare

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Public opinion studies about the farming of animals for food identify two basic viewpoints. The first involves the nearly unconditional viewpoint that animals should not be bred and raised for the purpose of slaughter for human consumption. This viewpoint is vehemently supported by vegans and many vegetarians, whose diet is motivated by ethics and the belief that all life is sacred. There also appears to be growing support for this perspective among those who have a concern for the environment, though it may be more conditional than animal welfare concerns. Animal agriculture is the largest anthropogenic user of land as well as an inefficient use of natural resources and a major contributor to environmental problems, such as climate change.

The second, mostly opposing viewpoint among consumers is acceptance that animal products will remain part of the human diet indefinitely. This acceptance stems from a variety of sources, including a belief in man’s “dominion” over other animals and frequently, resignation that consuming animals is inevitable and a “necessary evil.” A majority of consumers arguably remain isolated from the animals and farming processes. Research conducted in 2004 and sponsored by the American Meat Institute found that about half of U.S. consumers either don’t think about animal care when they are making food purchase decisions or think that it is unimportant.

This lack of sentiment appears outside of the U.S. as well. In 2005, researchers identified a lack of sentiment among European Union consumers; 52% stated they either “never” or “very rarely” think about the welfare and protection of animals when they buy meat. However, a large segment of consumers that accept the farming of animals for food also believe that people have a moral responsibility to provide these animals with a higher standard of care during their lives. There appears to be staunch opposition among some consumers to the factory farming model, which is believed to violate many basic animal

welfare principles. These are perhaps most aptly embodied in the “Five Freedoms,” which was developed by the United Kingdom-based Farm Animal Welfare Council.<sup>1</sup> They include:

1. Freedom from hunger and thirst.
2. Freedom from discomfort.
3. Freedom from pain, injury or disease.
4. Freedom to express normal behavior.
5. Freedom from fear and distress.

People who are most likely to be so-called “ethical consumers” are the subject matter of numerous research studies. They typically express concern for farmed animals and are more likely to change their personal consumption and purchase behavior based on these concerns. Published results vary by study, but those indicating that protecting farmed animals is of personal importance to them range from 52-95%. At least some variation of these statistics reflects differences in question wording or other survey parameters, but the wide range is also evidence of the nuances in opinion that exist among this group of consumers. The table below lists some of the most recent research studies on this topic.

#### RESEARCH ON GENERAL ATTITUDES TOWARD FARMED ANIMAL WELFARE\*

Year	Source	Issue/Findings
2010	Humane Research Council ( <i>Animal Tracker Wave 3 – March 2010</i> )	How important to you is the protection of animals when it comes to buying food? <ul style="list-style-type: none"> <li>• Very important (29%)</li> <li>• Somewhat important (41%)</li> <li>• Not very important (15%)</li> <li>• Not at all important (10%)</li> <li>• Don't know (5%)</li> </ul>
2010	Context Marketing (Ethical Food: The Ethical Claims that Matter Most to Food Shoppers and How Ethical Concerns Influence Food Purchases)	Consumers thought that “ethical food” products should avoid harming the environment (93%); meet high safety standards (92%); use environmentally sustainable practices (91%); avoid inhumane treatment of animals (91%); be produced to high-quality standards (91%).
2009	Humane Research Council ( <i>Animal Tracker Wave 2 – March 2009</i> )	How important to you is the welfare and protection of animals raised for food? <ul style="list-style-type: none"> <li>• Very important (48%)</li> <li>• Somewhat important (31%)</li> <li>• Not very important (10%)</li> <li>• Not at all important (6%)</li> <li>• Don't know (5%)</li> </ul>
2008	The Co-op (Shoppers Care More About Animals than Climate)	The top ethical priorities of U.K. consumers, when shopping, are animal welfare (21%), fair trade (14%) and climate change (4%)

<sup>1</sup> For more details about the Five Freedoms, see <http://www.fawc.org.uk/freedoms.htm>

### RESEARCH ON GENERAL ATTITUDES TOWARD FARMED ANIMAL WELFARE\*, CONTINUED

Year	Source	Issue/Findings
2008	Humane Research Council ( <i>Animal Tracker Wave 1 – June 2008</i> )	How important to you is the welfare and protection of animals raised for food? <ul style="list-style-type: none"> <li>• Very important (44%)</li> <li>• Somewhat important (35%)</li> <li>• Not very important (12%)</li> <li>• Not at all important (3%)</li> <li>• Don't know (6%)</li> </ul>
2007	Freedom Food (Consumer Attitudes to Animal Welfare)	67% of United Kingdom consumers consider animal welfare to be an important issue when shopping for food.
2007	Department for Environment, Food, and Rural Affairs (Survey of Public Attitudes and Behaviors Toward the Environment)	Amount of thought given to issues of farmed animal welfare by British consumers: <ul style="list-style-type: none"> <li>• A great deal (16%)</li> <li>• A fair amount (24%)</li> <li>• A little (37%)</li> <li>• Have not really given this issue any thought (22%)</li> </ul>
2005	European Commission Health and Consumer Protection Directorate (Response Statistics for Community Action Plan on Animal Welfare and Protection)	Europeans believe that the condition of farmed animals within the European Union is: <ul style="list-style-type: none"> <li>• Very Poor (35%)</li> <li>• Poor (29%)</li> <li>• Moderate (18%)</li> <li>• Good (10%)</li> <li>• Very Good (5%)</li> <li>• Unsure (2%)</li> </ul> Regarding animal welfare and the protection of farmed animals, Europeans indicate that: <ul style="list-style-type: none"> <li>• Something certainly should be done (78%)</li> <li>• Something should probably be done (10%)</li> <li>• Nothing probably needs to be done (6%)</li> <li>• Definitely nothing needs to be done (4%)</li> </ul>
2004	American Meat Institute (Laying out the Facts)	The importance of animal care when deciding which food, brands, and shops to select: <ul style="list-style-type: none"> <li>• Important (50%)</li> <li>• Don't think about animal care (26%)</li> <li>• Unimportant (24%)</li> </ul>

### What Drives Concern for Farmed Animals?

Farmed animal welfare is a subject of concern for consumers on several different levels. First, humans empathize with other living creatures; studies have shown that up to 81% of people believe that animals are similar to humans in their ability to feel pain and suffering. Further, 62% believe that farmed animal welfare should be addressed despite human suffering (see previous table). As established by a 2005 Humane Research Council report, this compassion and respect for life is a significant motivator for vegetarianism and a contributory motivation for semi-vegetarianism.

Furthermore, there is evidence that many consumers link animal welfare to food quality and safety. For example, a 2007 U.S. Farm Bureau study found that more than three-fourths of U.S. respondents believe that animals raised under “higher welfare standards” produce safer and better tasting meat. In the European Union, more than half of respondents from one study linked foods produced in accordance with higher animal welfare standards to healthier eating and better overall quality. Other research studies validate these beliefs, including the estimate that 73% of emerging human diseases come from animals. As a result of these factors, there has been some improvement in farm animal conditions; more companies are discontinuing the intensive confinement of animals and more consumers and food service outlets are choosing to purchase higher animal welfare foods.

Recently, consumers are also beginning to associate concentrated animal farming with its detrimental effects on the environment, and specifically climate change, spurring more interest in vegetarianism and reduced meat consumption. Scientific studies show that, to produce equivalent amounts of product, greater quantities of natural resources are required and greater quantities of greenhouse gas emissions are generated from animal farming relative to plant farming. The following table summarizes highlights from a few studies relevant to key motivators for concern for farmed animals.

**RESEARCH ON FARMED ANIMAL WELFARE MOTIVATORS\***

Year	Source	Issue/Findings
2009	Universita degli Studi della Basilicata (Effect of Information About Organic Production on Beef Liking and Consumer Willingness to Pay)	Information about organic farming can be a major determinant of beef liking and consumer willingness to pay. Mean scores of expected and perceived liking were higher for organic beef as compared to conventional beef.
2008	Mintel (Greenbacks Going for Greener Goods)	Overall awareness of and concern for the environment is believed to be responsible for the increased interest in alternative fuels, natural and organic products, and relatively low-carbon footprint operations for raising farmed animals.
2008	Worldwatch Institute (Meat and Seafood: The Global Diet's Most Costly Ingredients)	More companies around the world are adjusting their farm-animal confinement policies and requesting clarification of consumer labels to reflect these changes.  73% of emerging human diseases are derived from animals.
2007	European Commission (Animal Welfare Concerns Highlighted by Survey)	More than half of respondents perceive foods produced according to higher animal welfare standards to be healthier than other foods, while 48% associate them with better quality.
2004	Ipsos Reid (Public Opinion of Pork Industry Getting Better, Says Prominent Analysts)	53% of Canadians consider hog farming to be environmentally unfriendly.  51% of Canadians feel that hogs are treated “somewhat well” to “well”.

## How Do Opinions Affect Consumer Behavior?

According to surveys, people who believe in higher standards for animal care are often willing to change their shopping/consumption habits and/or pay more for food items that are produced under more “humane” conditions. Several European studies have addressed the price issue, specifically. One found that 62% of survey respondents are willing to change their shopping habits (including paying higher prices) to obtain more animal welfare friendly products. Another study found that even more consumers (74%) believe they can influence the welfare of farmed animals simply through their purchasing behavior. This same research shows that 57% of European consumers are willing to pay more for eggs sourced from an animal welfare friendly production system.

Price sensitivity research for the U.S. market is relatively limited, but there is evidence that attitudes are similar to those in Europe. Production of cage-free eggs is on the rise in the U.S., for instance; the United Egg Producers estimates that 5% of U.S. egg production is either cage free or organic (produced by cage free chickens that are fed only organic feed and have access to the outdoors), an increase of 2% from three years ago. Other studies reveal similar findings; in 2004, a Market Directions report found that between 33% and 55% of consumers are willing to pay up to 10% higher prices for meat and dairy products that were produced under humane conditions, and in 2010, a Context Marketing report found that 69% of consumers are willing to pay more for food produced to higher ethical standards.

Outside of continental Europe and the U.S., a fair number of consumers are also willing to purchase higher animal welfare products. One study in the United Kingdom estimates that up to 10% of consumers are “high animal welfare” shoppers, consumers who purchase *all* higher welfare foods for their weekly shopping. However, the majority of the U.K. population is somewhat more reserved and makes an estimated one to two higher-welfare purchases per week; slightly more than one-third (36%) do not make any such purchases. Also in the United Kingdom, an estimated 38% of consumers report having switched to “free range” poultry as the result of the TV series, *Big Food Fight*. Additionally, a 2009 report on shopper trends found that the percentage of U.K. consumers who mentioned animal welfare as a driver of product choice increased from 8% in 2005 to 20% in 2009.

### RESEARCH ON CONSUMER ACTIONS FOR FARMED ANIMALS\*

Year	Source	Issue/Findings
2010	Context Marketing (Ethical Food: The Ethical Claims that Matter Most to Food Shoppers and How Ethical Concerns Influence Food Purchases)	<p>69% of consumers are willing to pay more for food produced to higher ethical standards.</p> <p>44% of consumers stopped buying a brand because they learned the company producing it was acting in a socially irresponsible or unethical way.</p> <p>42% of consumers are more loyal to ethically produced food brands than other brands.</p>
2009	Royal Society for the Prevention of Cruelty to Animals (Ethical Shopping – Up in Flames?)	72% of consumers said that whether they purchase higher animal welfare products or not depends on price or special offers.

**RESEARCH ON CONSUMER ACTIONS FOR FARMED ANIMALS\*, CONTINUED**

Year	Source	Issue/Findings
2009	Freedom Food (Animal Welfare Revolution Continues in Economic Recovery)	The number of farm animals raised under the RSPCA's "higher welfare" standards jumped from 532 million in 2008 to 363 million in 2009.
2009	IGD ( <i>Shopper Trends 2009</i> )	U.K. based consumers who mentioned animal welfare as a driver of product choice: <ul style="list-style-type: none"> <li>• 2009 (20%)</li> <li>• 2008 (13%)</li> <li>• 2007 (11%)</li> <li>• 2006 (10%)</li> <li>• 2005 (8%)</li> </ul>
2008	English Beef and Lamb Executive ( <i>What is "Ethical" Veal?</i> )	Veal comprises 0.1% of the meat bought in Britain; supermarkets and restaurants are banning imported veal and promoting "ethical veal."
2007	Freedom Food ( <i>Consumer Attitudes to Animal Welfare, a Report for Freedom Food by IGD</i> )	10% of consumers considered themselves to be high animal welfare shoppers who purchase all higher-welfare foods within their weekly shopping.  36% do not make any higher animal welfare purchases at all, and somewhat more than 50% of the population is making one or two higher animal welfare purchases per week.
2007	European Commission ( <i>Animal Welfare Concerns Highlighted by Survey</i> )	62% of European consumers would change their shopping habits (including paying higher prices) to obtain more animal welfare friendly products.  Consumers do not currently feel that they have sufficient options, primarily because they lack the knowledge to distinguish higher animal welfare products from others.
2005	Humane Research Council ( <i>Advocating Meat Reduction and Vegetarianism to U.S. Adults</i> )	2% of Americans reduced meat consumption over the last year primarily to "reduce the suffering of animals on farms," while 9% said this was contributory to their decision.
2005	Eurobarometer ( <i>Attitudes of Consumers Towards the Welfare of Farmed Animals</i> )	74% of European consumers believe they can influence the welfare of farmed animals through their purchasing behavior.
2004	Market Directions ( <i>Consumers Attitudes About Animal Welfare</i> )	33-55% of American consumers are willing to pay 10% more for meat and dairy produced under "humane" conditions.
2004	Ohio State University ( <i>Animal Welfare—What do People Think</i> )	59% are willing to pay more for humanely raised products: <ul style="list-style-type: none"> <li>• 43% are willing to pay 10% more.</li> <li>• 12% are willing to pay 25% more.</li> </ul>

## Farmed Animal Welfare Regulation

Current regulations for farmed animal welfare differ widely by country and U.S. state. Public opinion of farmed animal legislation also appears to vary by knowledge as well as specific regulatory issue. Most people are in favor of some form of industry regulation, although a majority are not very knowledgeable about the existence of (or lack of) current regulations. Wave 2 of HRC’s *Animal Tracker* study found that 31% of U.S. adults would “strongly support” a law requiring that farm animals are given enough space to behave naturally. However, when asked if current laws for farm animals are “adequate,” 32% of *Animal Tracker* respondents said they don’t know (33% said adequate, 35% not adequate).

A 2003 Zogby study found that 82% of respondents feel there should be effective laws protecting farmed animals from cruelty. Nearly three-fourths (72%) say that farms should be inspected by the government to ensure that laws to protect animals are being followed; 31% falsely believe that this is currently being done. The same report shows that more than half of respondents (63%) believe that state laws prohibit animal cruelty; 44% believe there are effective U.S. state and federal laws already. Other evidence also indicates that consumers support implementing animal welfare legislation. The American Meat Institute found that although two-thirds of American consumers are satisfied with industry self-regulation, almost as many (56%) agree with government regulation, even if it means higher food costs.

The table below covers a few recent studies relating to farmed animal regulation.

### PUBLIC OPINION ABOUT FARMED ANIMAL REGULATIONS\*

Year	Source	Issue/Findings
2009	Humane Research Council ( <i>Animal Tracker</i> Wave 2 – March 2009)	<p>Do you think that laws protecting animals from inhumane treatment are adequate or inadequate for animals raised for food?</p> <ul style="list-style-type: none"> <li>• Not adequate (35%)</li> <li>• Adequate (33%)</li> <li>• Don’t know (32%)</li> </ul> <p>Would you support or oppose a law requiring that farm animals, including pigs, cows, and chickens, are provided with enough space to behave naturally?</p> <ul style="list-style-type: none"> <li>• Strongly support (31%)</li> <li>• Somewhat support (34%)</li> <li>• Somewhat oppose (14%)</li> <li>• Strongly oppose (7%)</li> <li>• Don’t know (15%)</li> </ul>



**PUBLIC OPINION ABOUT FARMED ANIMAL REGULATIONS\*, CONTINUED**

Year	Source	Issue/Findings
2003	Zogby (Nationwide Views on Treatment of Farm Animals)	<p>82% feel effective laws protecting animals from cruelty exist.</p> <p>72% say that farms should be inspected by the government to ensure that laws protecting animals are being enforced.</p> <p>53% believe that state laws prohibit animal cruelty.</p> <p>44% believe effective state and federal laws exist to protect animals.</p> <p>36% falsely believe that the Animal Welfare Act is the central federal legislation that sets standards of care and provide protection for farm animal care.</p> <p>31% falsely believe that government inspectors check farms to ensure enforcement of laws.</p>
2003	Gallup Poll (Brief Summary of Several U.S. Farm Animal Welfare Polls Conducted in the Last Decade)	Americans support passing strict laws concerning the treatment of farm animals by a 62% to 35% margin.
2000	Zogby (U.S. Public Supports Humane Treatment for Hens, Close Quarters for Chickens is Unacceptable)	86% of Americans agree that "crowding 8-10 chickens in cages, about the size of an open newspaper, so tightly that they cannot stretch their wings" is "unacceptable."

\* Source: Details for all of the research studies cited in this primer are available to registered users of HRC's HumaneSpot.org. Additional data for U.S. states and other geographies are also available.