

Consumers' Attitudes on Meat Production: What They Know, What They Don't Know and Why It Matters

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Why talk about consumers at all?

- This has been a polarized debate
- Many Canadians not active in the discussion
 - Its who everyone is trying to influence
 - Not aware?
 - Don't care?
 - Not worried?
- They make purchase decisions
 - Establishing an acceptable standard for society
 - Not just about what they will buy

Polarized discussion

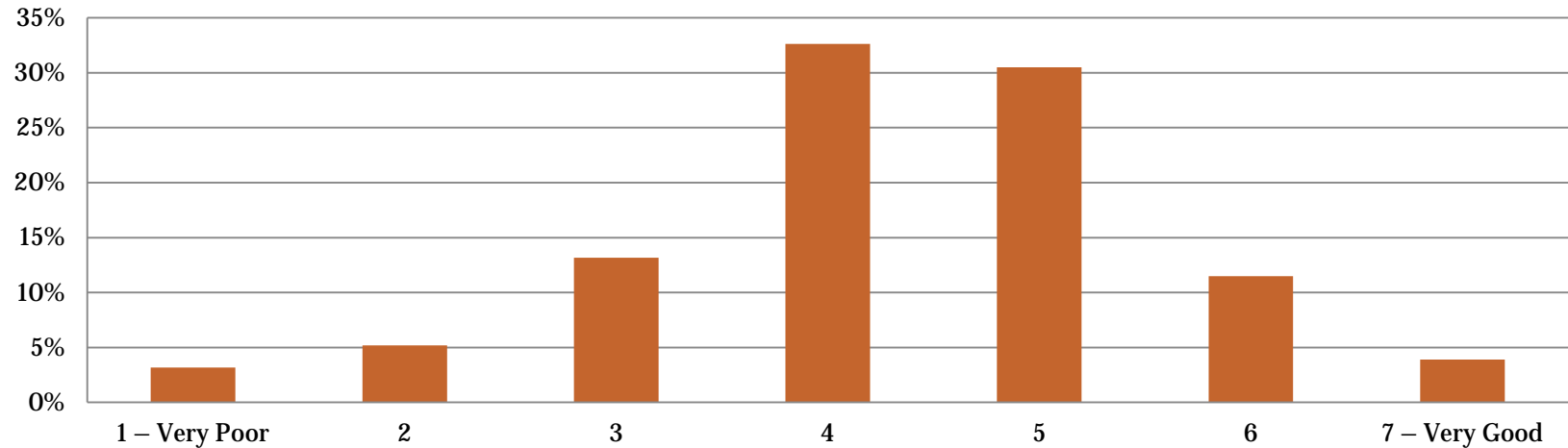
- **Activists**
 - We need to do better
 - Consumers care
- **Industry**
 - Consumers trust us
 - We are doing a good job
 - If you want more you need to pay us for it

Are antibiotics a concern?

- Some will argue that the level of awareness and concern is very high
 - Consumer Reports survey found 72% very or extremely concerned, connected to antibiotic resistance
 - Less publically available data on antibiotic use generally
 - Can we find clues elsewhere?

AW in the consciousness of Canadians

Respondents perception of the current state of farm animal welfare in Canada.

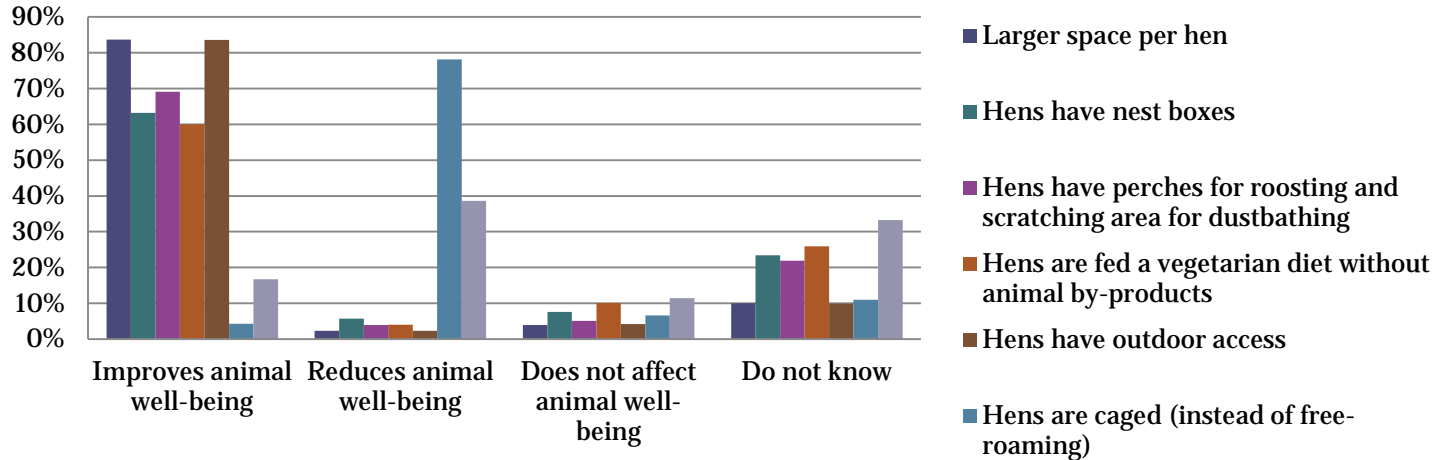


Consumers confused?

- **Have remarkably little understanding**
 - **Ag production**
 - **Animal welfare**
 - 80% say more space improve pig welfare
 - 65 % say gestation stalls improve pig welfare
 - **They overestimate their level of understanding**
- **Don't know what they are getting now**
 - 25% said don't know free range or free run eggs
 - 50% don't know on crate free pork
 - 47% don't know on antibiotic free pork

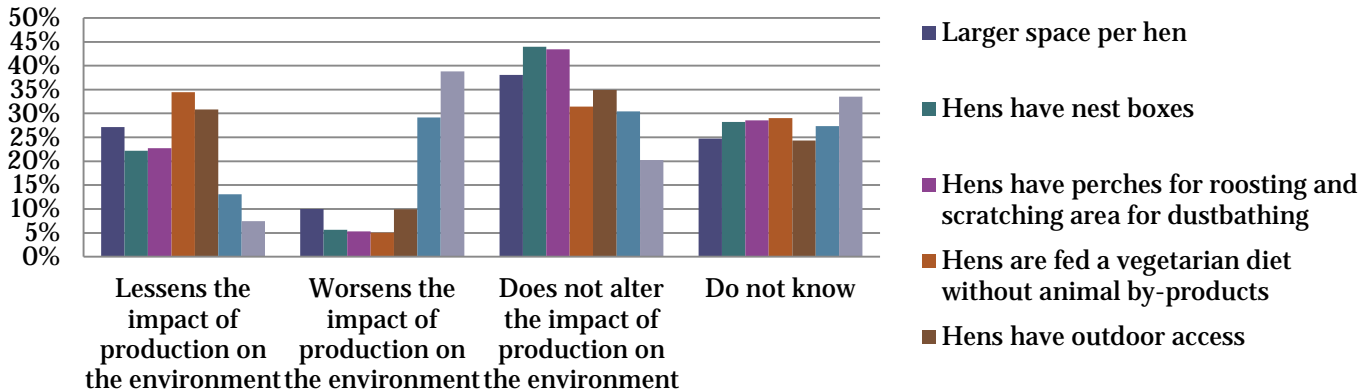
Perceptions of antibiotics

Respondents perception of how egg-laying hen production practices impact the animal's well-being



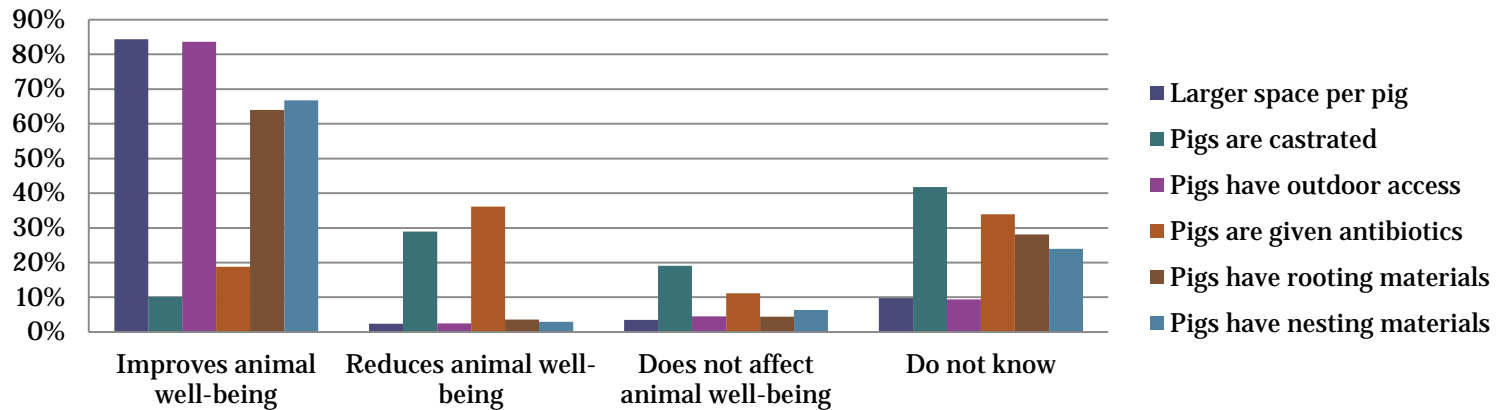
Perceptions of antibiotics

Respondents perception of how egg-laying hen production practices impact the environment



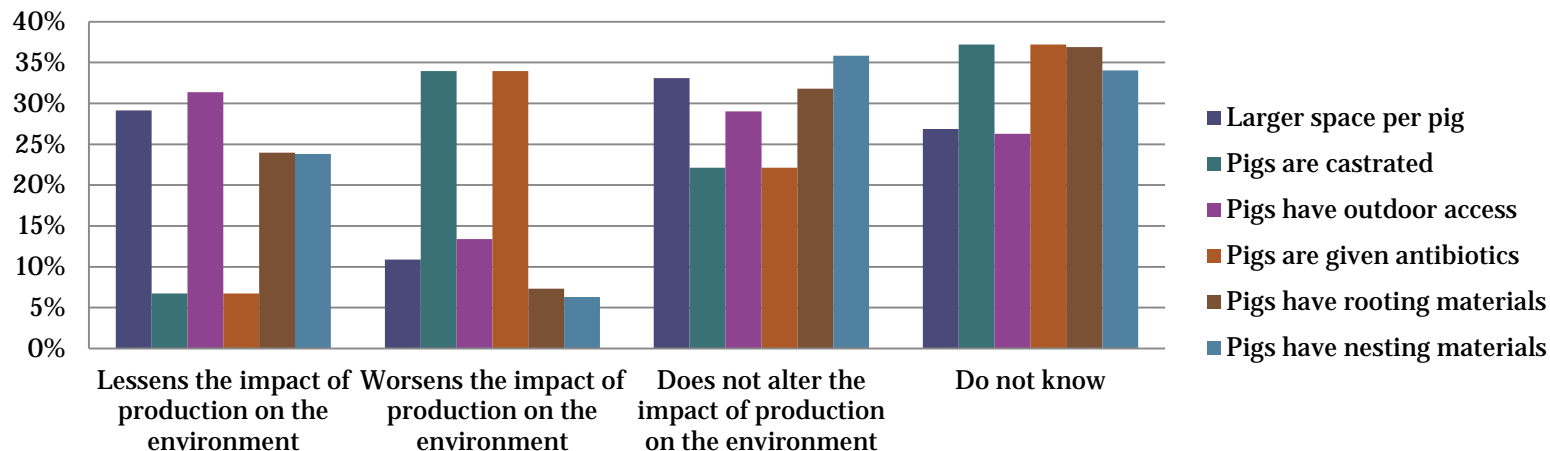
Perceptions of antibiotics

Respondents perception of how hog production practices impact animal's well-being



Perceptions of antibiotics

Respondents perception of how hog production practices impact the environment



Are antibiotics a concern?

- **Many WTP studies**
 - Varying degrees of premium suggested
 - Attribute priming
- **Growth of “antibiotic free” and reduced use**
 - Difficult to quantify
 - May also be hard to attribute just to that characteristic

Are antibiotics a concern?

- Also studies about “clear conscience” versus willingness to pay.
 - Decrease in consumption of some products
 - Pork and beef most likely to decrease
 - Behaviour different in retail and food service

Are antibiotics a concern?

- **Heard the issue of trust this morning**
- **This also affects the brand.**
 - **Products**
 - **Stakeholders**

Consumer's Choices

- In 2013 animal welfare ranked in low in choice of restaurant
 - 2.2/100 . . . BUT
 - Much higher for a segment of the market – which has higher proportion of young people
 - Higher than “commitment to fair treatment of producers”

Consumer's Choices

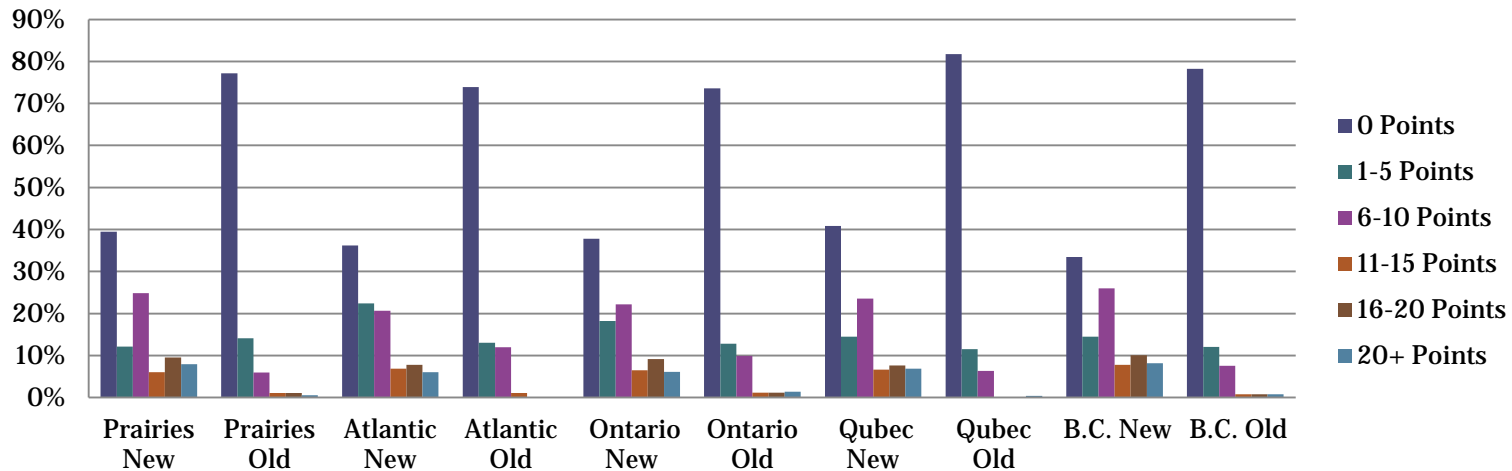
- In 2015 animal welfare ranked much higher in choice of restaurant
 - 8/100 . . .
 - Almost 4 fold increase in 2 years



So we need to look a bit deeper at what is happening

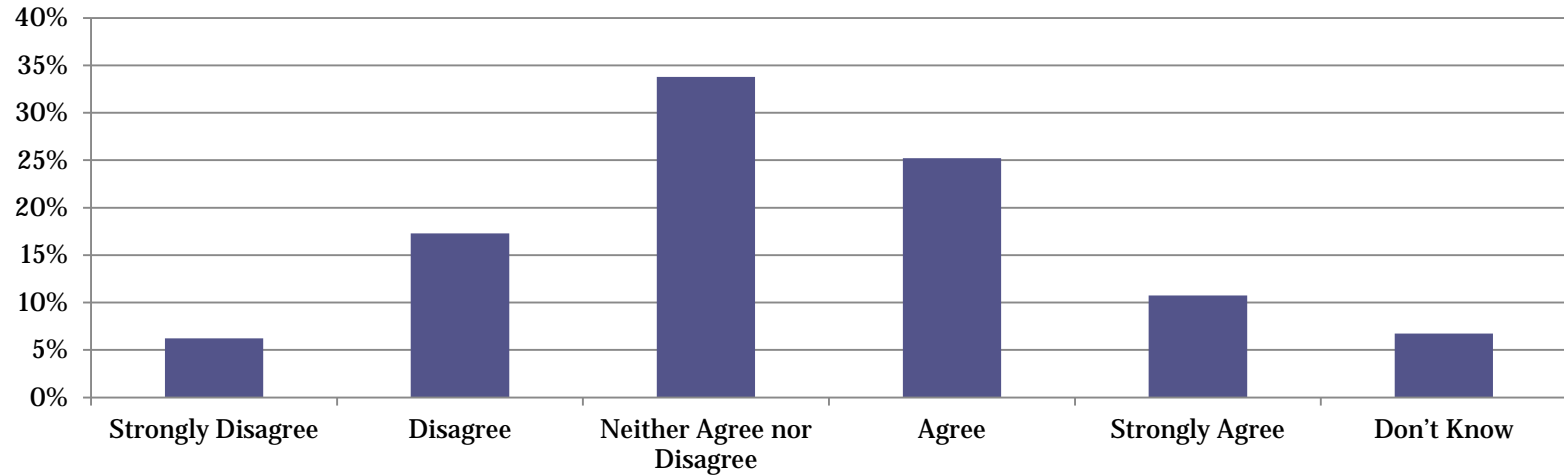
Scores by Region

Proportion of regional group by farm animal welfare score groups



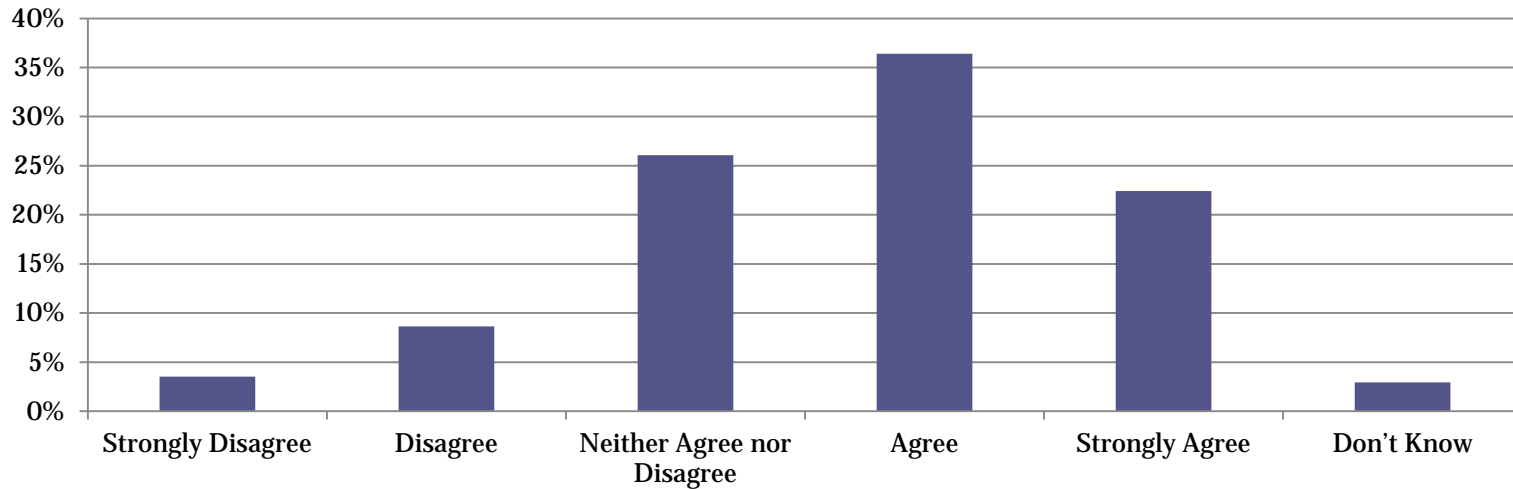
I can make a difference

My personal food choices have a large impact on the well-being of farm animals.



They want more information

Labels should indicate more clearly the rearing conditions of the animals.

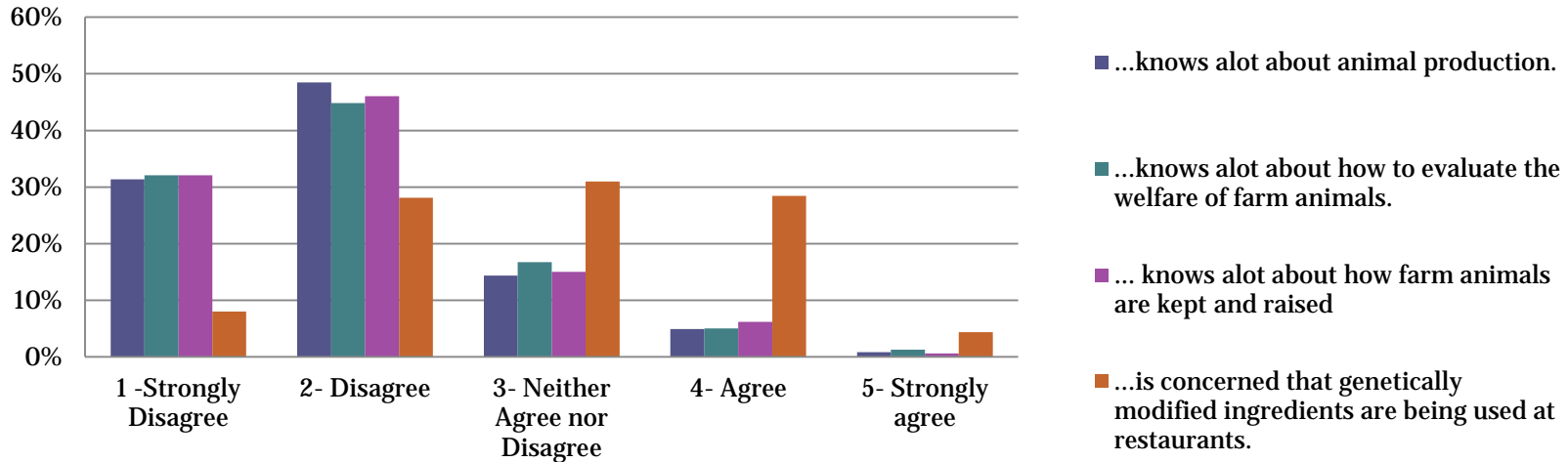


The rest of them

- Real danger in assuming they don't care about animal production
 - They may think things are relatively good now
 - That means uncertainty remains

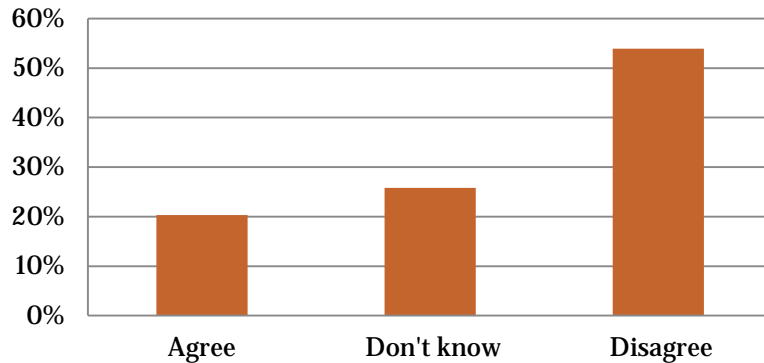
Very Little Understanding

Level of agreement with the statement "the average person..."

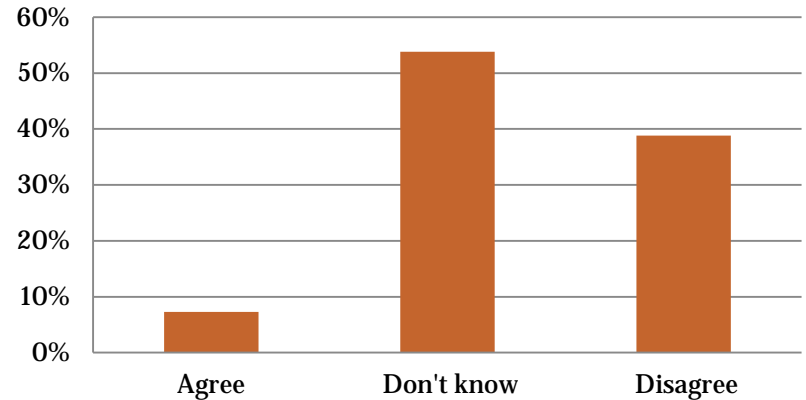


Consumers have very little understanding of production but expanding

Responses to "Conventionally produced eggs are from chickens that have outdoor access"

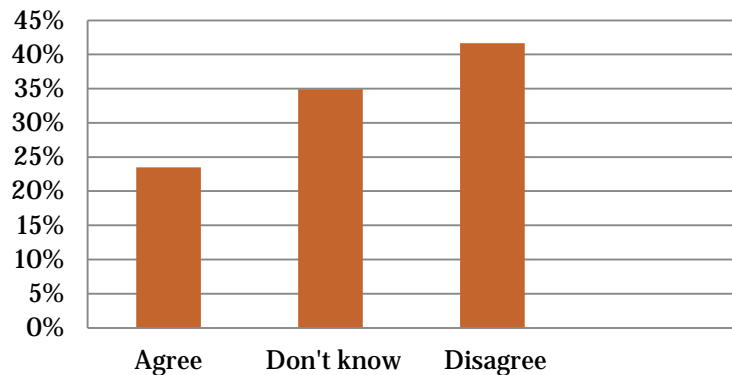


Responses to "Chickens raised for meat are slaughtered at the age of 4"

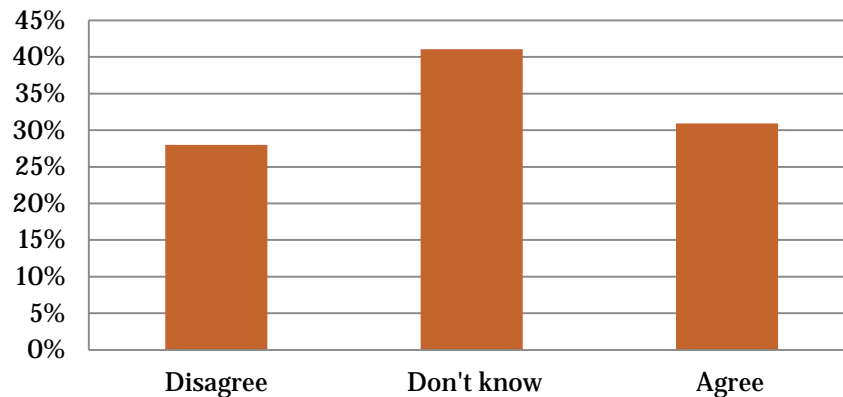


Consumers have very little understanding of production

Responses to "Conventionally produced pork comes from hogs that have outdoor access"



Responses "A dairy cow gives milk only after calving"



Consumers

- There may be some potential for nuance here
 - Understand that antibiotic use cannot be totally avoided
 - In-feed – “unnatural” or inappropriate

Consumers

- Indication of willingness to pay for some sort of “reduced antibiotic” attribute
 - Some risk here
 - Evidence that it is affecting patronage decisions
 - Issue of “attribute priming.”

Antibiotics are different

- **Striking a balance – tradeoffs**
 - **Not just cost**
 - **Welfare and resistance**
 - **Welfare and perception of risk**
- **Particularly a challenge given poor understanding by many stakeholders**

Some momentum

- The industry is doing things anyway
 - Consumers likely not aware
- Commitments bring awareness and demand
 - Attribute priming
- We all play a role in shaping the discussion

Consumers?



- McKendree et al, Purdue University

Figure 1. Concern for Hog Production Practices (Means in Bold)

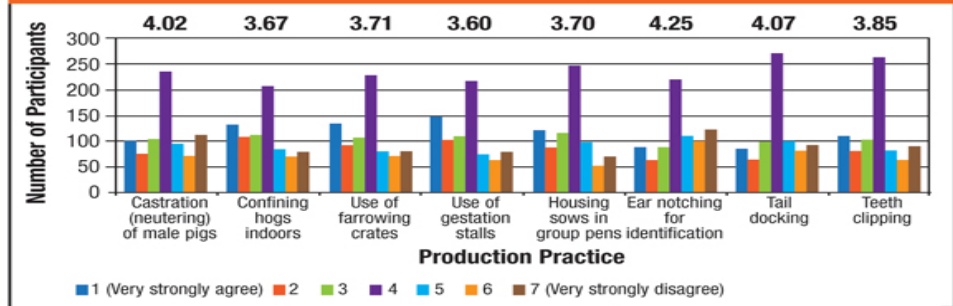
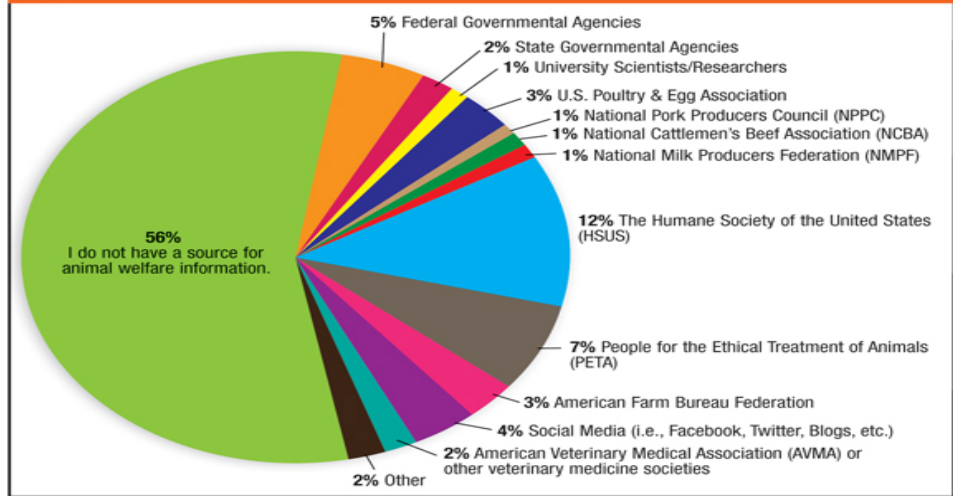


Figure 2. Most Frequented Source for Animal Welfare Information



Thank You!

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Thank you