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
  - It's 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

- Improves animal well-being
- Reduces animal well-being
- Does not affect animal well-being
- Do not know

- Larger space per hen
- Hens have nest boxes
- Hens have perches for roosting and scratching area for dustbathing
- Hens are fed a vegetarian diet without animal by-products
- Hens have outdoor access
- Hens are caged (instead of free-roaming)
Perceptions of antibiotics

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Lessens the impact of production on the environment
Worsens the impact of production on the environment
Does not alter the impact of production on the environment
Do not know
Perceptions of antibiotics

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

- Improves animal well-being
- Reduces animal well-being
- Does not affect animal well-being
- Do not know

Larger space per pig
Pigs are castrated
Pigs have outdoor access
Pigs are given antibiotics
Pigs have rooting materials
Pigs have nesting materials
Perceptions of antibiotics

Respondents perception of how hog production practices impact the environment

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- Worsens the impact of production on the environment
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Bars represent:
- Larger space per pig
- Pigs are castrated
- Pigs have outdoor access
- Pigs are given antibiotics
- Pigs have rooting materials
- Pigs have nesting materials
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

0 Points
1-5 Points
6-10 Points
11-15 Points
16-20 Points
20+ Points
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..."

- Knows a lot about animal production.
- Knows a lot about how to evaluate the welfare of farm animals.
- Knows a lot about how farm animals are kept and raised.
- Is concerned that genetically modified ingredients are being used at restaurants.
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
Thank You!

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Thank you