



PERCEPTION **IS REALITY**

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Understanding consumers' perceptions of animal welfare is becoming increasingly important to livestock industries as they try to communicate their products. Many questions arise within livestock agriculture when trying to implement production systems that are acceptable socially and financially.

To address these questions, a survey of 1 004 US consumers was conducted in the summer of 2014. The sample was representative in terms of age, gender, pre-tax household income, and region of residency. Survey questions focused on livestock production, food purchasing patterns, especially meat and milk purchasing decisions, and information sources for animal welfare.

Are all dairy products created equal?

The welfare of dairy cattle is particularly complicated to discuss in the consumer realm for a number of reasons. First, milk is one of the few livestock products that does not involve slaughter. In the case of meat, the slaughter of the animal is inevitable, but for milk (and eggs), the animal lives to produce again. This aspect of continuous production is hypothesised to influence how consumers view dairy cattle, relative to other species.

Past research has found that consumers may have more affinity for (or emotional attachment to) dairy cows than pigs. This finding regarding differences in livestock welfare perceptions across species prompted further investigation into the possibility of differences in the perceptions of animal welfare based on the specific consumer product. It was found that consumers were willing to pay more, in terms of percentage increase in price, for verified pasture access, antibiotic use, and rbST/rbGH use when buying yogurt compared to ice cream. Various reasons may exist for the higher valuation of welfare-enhancing verified attributes in dairy cattle when measured in yogurt compared to ice cream. Perhaps yogurt is seen as more natural, or “closer to the cow”. Perhaps consumption patterns and eating occasion play a role.

RECENT WORK AT PURDUE UNIVERSITY HAS SOUGHT TO ANSWER THE FOLLOWING QUESTIONS:

- Are all livestock species the same in consumers' minds in terms of concern for animal welfare?
- Does the product that consumers purchase influence their perceptions of livestock animal welfare?
- Are consumers willing to pay different amounts to improve animal welfare depending on the product they are purchasing?
- Who do consumers go to for animal welfare information?
- Who do consumers think can influence the well-being of animals within the supply chain?

// Consumers are willing to pay more for yogurt compared to ice cream.”



Finally, the perceived healthiness of products may affect whether consumers are willing to pay more for improved animal welfare. Regardless of the reasons, the dairy industry is facing a challenge – yogurt and ice cream are both made from milk produced by the very same cows. If consumers' willingness to pay for animal welfare may vary across species and the specific product purchased, livestock industries must be extremely careful determining optimal practices and what changes consumers are willing to pay for.

Animal welfare information

It is apparent that consumers are interested in animal welfare information related to livestock species, as evidenced by the numerous labels and marketing campaigns in the marketplace today. However, which information sources do consumers use to get information on animal welfare? An ongoing study at Purdue University is examining the sources of animal welfare information consumers use.



Information source	% of respondents
Federal governmental agencies	8
State governmental agencies	4
University scientists/researchers	3
Agricultural producer groups/sources (United Egg Producers, US Poultry & Egg Association, National Pork Producers Council, National Cattlemen's Beef Association, National Milk Producers Federation, American Farm Bureau Association)	7
The Humane Society of the US (HSUS)	9
People for the Ethical Treatment of Animals (PETA)	7
American Veterinary Medical Association (AVMA) or other veterinary medicine societies	2
Environmental groups (Sierra Club, Greenpeace, the Ocean Conservancy)	3
Pew Foundation/Charitable Trust	0
American Medical Association (AMA) or other human health-oriented association	0
Other	3
I do not have a source for animal welfare/humane treatment information	54

Researchers have found that the majority of respondents do not report having any source for animal welfare information.

While the majority of respondents do not have any source for animal welfare information, there are minor differences in the sources used depending on gender, age, and income.

The results show that respondents in the youngest age category – 18 to 24 years – are those most frequently reporting a source for animal welfare information, whereas those 65 and over are most often reporting having no source for animal welfare information. Thus, preliminary analysis shows that younger consumers are more likely to report some source for animal welfare information.

Respondents' reported sources of animal welfare information according to household income category. In general, with a single exception (\$100 000 to \$149 000 annual income), households with higher incomes reported having a source for animal welfare information more frequently than those in lower income groups. Speaking generally, it is suggested by preliminary analysis that higher

income brackets more often reported the use of government agencies (state and federal information sources) than lower income brackets.

Thus, there are differences noted across age and income brackets in the frequency with which respondents reported having any source at all, as well as some minor differences regarding which sources were used. Additional analysis of this data is still underway.

WHO INFLUENCES ANIMAL WELFARE?

Part of the difficulty in communicating to consumers about livestock production, including the production of dairy products, is the large number of parties involved in the food production and distribution process. Survey respondents were asked to report to what extent various parties, ranging from farmers to the end-food consumer are able to influence animal welfare. Not surprisingly, a large percentage of respondents believe that farmers have a high ability to influence animal welfare. Interestingly, over 40% of consumers thought grocers and restaurants had a low ability to influence animal welfare. However, just over 40% of respondents believed the food purchaser or end consumer had a high ability to influence animal welfare.

Understanding which sources consumers go to for animal welfare information and which parties in the supply chain consumers believe have the ability to influence animal welfare is important for the various livestock industries as both factors are likely to colour public expectations relative to the protection of food producing animals.



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