

Strategy • Precision • Impact

To: Interested Parties

Cc: American Society for the Prevention of Cruelty to Animals From: Bob Meadow and Meryl O'Bryan, Lake Research Partners

Re: Results from a Survey of American Consumers<sup>i</sup>

Date: February 1, 2019

In July 2018, Lake Research Partners designed and analyzed an online survey of 1,000 American adult consumers regarding the labeling of meat, eggs, and dairy products and the treatment of animals raised for food. This survey followed up a survey in 2016 regarding the same topic, replicating some questions and adding others. The survey reveals that an overwhelming majority of consumers, regardless of age, gender, race, education, income, or geographic location, continue to be concerned about the welfare of animals raised for food and are making food choices to address this concern. Since 2016, there has been an increase in recognition of the certifications recommended by the American Society for the Prevention of Cruelty to Animals (ASPCA), and most consumers said they would be likely to switch to products with labels that guarantee that farm animals have better welfare. Consumers want independent welfare audits, and they are looking for tools to help them make animal welfare-conscious decisions. Consumers are in favor of the kinds of policy changes the ASPCA is working to achieve, and they would be more likely to buy a product with an animal welfare certification endorsed by the ASPCA. Consumers also want more animal welfare-conscious products where they shop, where they eat, and in schools.

## Here are the major findings:

- 1. Concern about farm animal welfare remains high and widespread. Seventy-six percent of consumers say they are concerned about the welfare of animals that are raised for food for people to eat<sup>ii</sup>. This level of concern has remained steady since 2016 (77% of consumers said they were concerned in 2016<sup>iii</sup>).
- Concern is not limited to one type of consumer. High levels of concern are found across demographic groups, regardless of factors such as gender, age, race, education, party identification, or household income:

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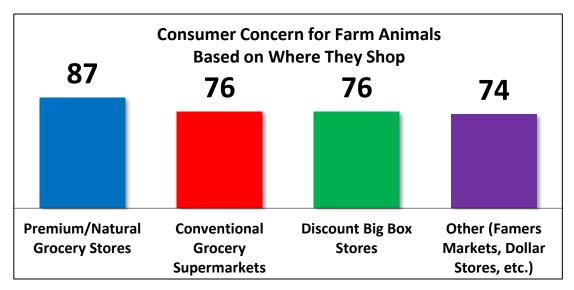
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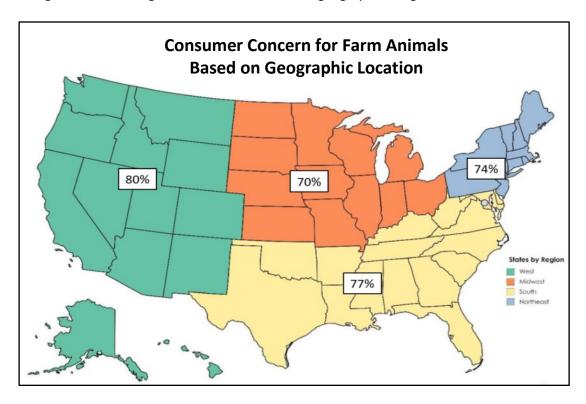
Joshua Ulibarri

Demographic Group	% Who are Concerned
Men	70%
Women	80%
Under Age 50	81%
Ages 50 and Over	69%
White	73%
African American	80%
Latino	82%
Non-College Educated	75%
College Educated	76%
Self-Identified Democrat	81%
Self-Identified Independent/Don't Know	74%
Self-Identified Republican	70%
Household Income of \$50,000 or Less	75%
Household Income of More than \$50,000	77%

While concern is higher among consumers who shop in premium and natural grocery stores, an overwhelming majority of consumers are concerned about the welfare of animals raised for food regardless of in which type of store they shop on a regular basis for groceries<sup>iv</sup>:



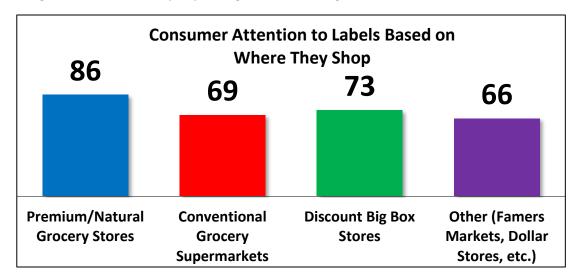
High concern among consumers extends across geographical regions:



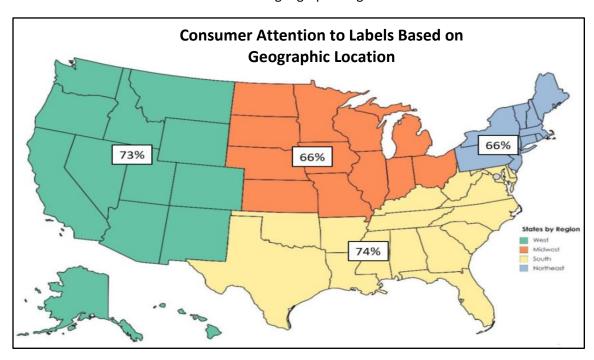
While there is some variation between – for example – men and women, younger or older consumers, or westerners and mid-western residents, overall, two-thirds or more of virtually every demographic group are concerned about farm animal welfare.

- 3. Consumers who frequently purchase meat products are even more concerned than those who purchase meat products less frequently. Eighty-three percent of consumers who purchase meat products at least a few times a week are concerned about the welfare of animals raised for food compared to 69% of consumers who purchase meat products about once a month.
- 4. Consumers are paying a lot of attention to food labels on meat, egg, and dairy products that say how the animal was raised. Seventy-one percent of consumers say that they pay attention to these labels. Attention to these labels is up slightly compared to 2016 (where 69% of consumers overall said they were paying attention) across all demographic groups.

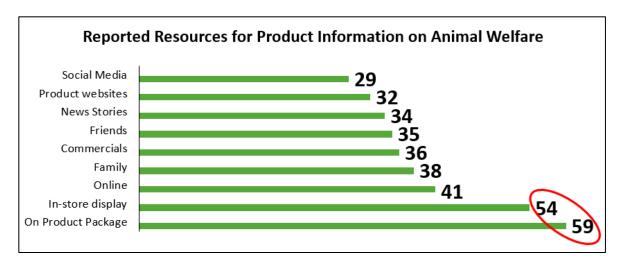
As with concern, a large majority of consumers are paying attention to these labels regardless of where they buy their groceries on a regular basis:



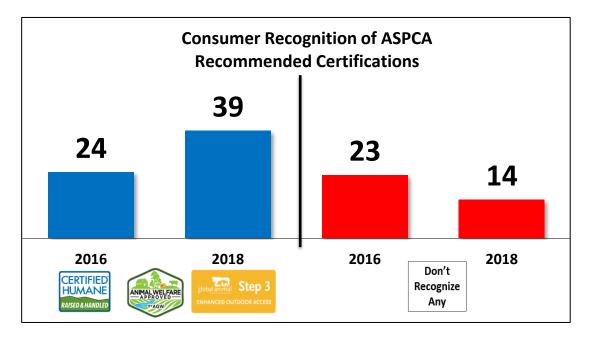
Attention to these labels extends across geographic region:



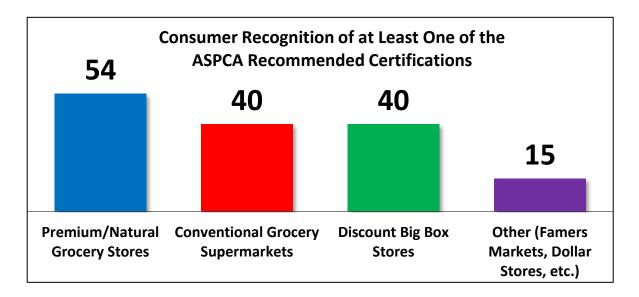
5. A majority of consumers report getting information on food products at the store, either through on-product packaging or an in-store display. There is a notable drop-off in the number of people who get information from non-store locations as well. This is an indication that a majority of consumers are making decisions about what products to buy at the point of purchase:



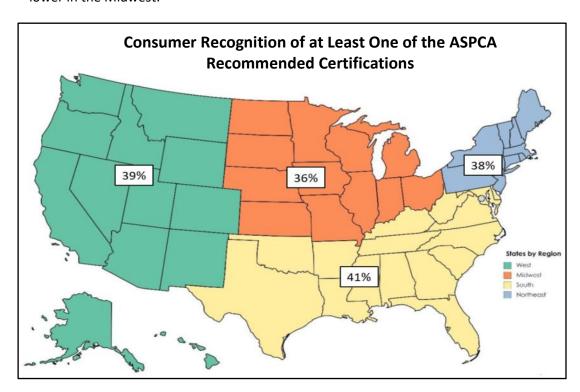
6. Since 2016, there is significantly increased recognition of at least one ASPCA recommended welfare certification. In 2016, 24% of consumers said that they recognized at least one of the humane certified labels; that percentage has increased significantly to 39% in 2018. At the same time, the percent of consumers who do not recognize any of the humane certified labels has significantly decreased from 23% in 2016 to 14% in 2018.



A majority of consumers who shop for groceries at premium and natural grocery stores recognize at least one of the ASPCA recommended certifications, while a plurality of consumers who shop regularly at conventional grocery supermarkets or discount big box stores recognize at least one of the three:



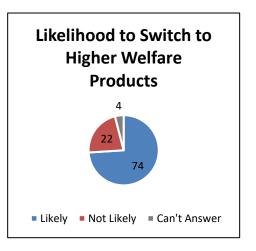
There is not widespread regional variation in consumers' recognition of ASPCA recommended labels; however, recognition is slightly higher in the South and slightly lower in the Midwest:



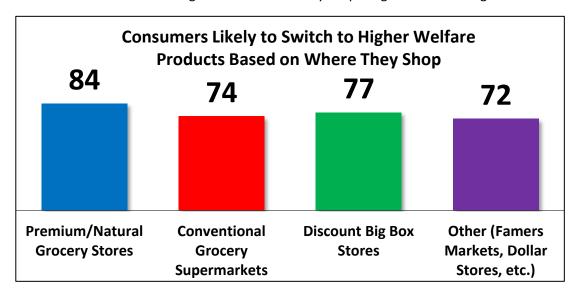
7. **Consumers value independent welfare audits**. Nearly 40% of consumers wrongly believe that there is already an objective third party checking on the welfare of animals on farms. Six out of seven (86%) consumers think that there should be an objective third party checking on the welfare of animals on farms. This is an increase from 2016, when 78% of consumers said they thought there should be an objective third party checking on the welfare of animals on farms.

8. Consumers express extremely high willingness to switch from uncertified to certified products with the assurance that they are from animals with better welfare. Three-fourths of consumers say that they would be likely to switch to meat, eggs, and dairy products with labels that guarantee that the products came from farm animals which were raised to a higher animal welfare standard. Being likely to switch extends across demographics, including gender, age, and race:

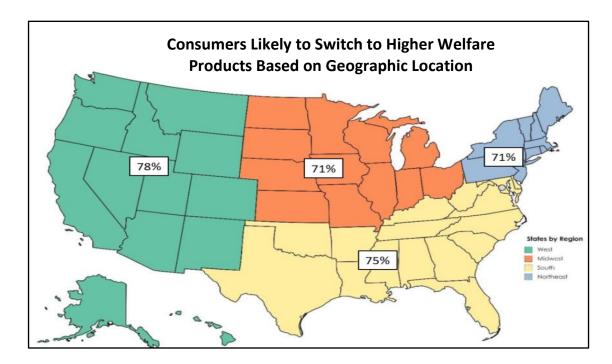
Demographic Group	Likely to Switch Products
Men	66%
Women	80%
Under Age 50	80%
Ages 50 and Older	69%
White	73%
African American	75%
Latino	86%



Most consumers report that they would be likely to switch to products with labels that guaranteed that the products came from farm animals which were raised to a higher animal welfare standard regardless of where they shop for groceries on a regular basis:



Being likely to switch products also extends across geographic region:



9. Consumers are looking for information and tools to help them make welfare-conscious decisions, and they want the kinds of policy changes the ASPCA is working to achieve. As discussed above, in-store displays (54% of consumers) and on the product package (59% of consumers) are the top two sources on which consumers rely to gather information about what to buy for themselves and their families.

Consumers want tools to help them find humanely raised food products. Sixty-two percent of consumers want clear information on labels regarding what to look for and what to avoid. And, around three-fourths (73%) of consumers would be more likely to purchase a product certified by an animal welfare certification that the ASPCA endorsed.

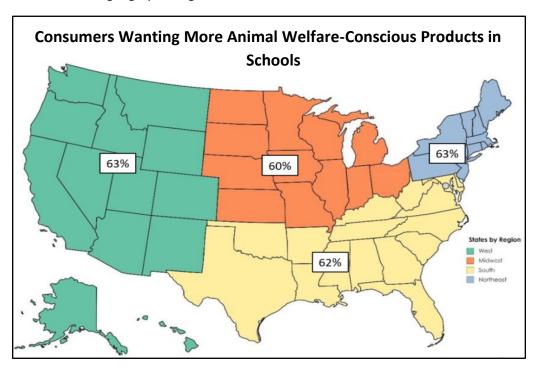
10. Consumers want more animal welfare-conscious products where they shop and where they eat. A strong majority want more animal welfare-conscious products at supermarkets and restaurants.

Demographic Group	% Who Want More Animal Welfare-Conscious Products at Supermarkets and Restaurants
Men	80%
Women	89%
Under Age 50	91%
Ages 50 and Over	78%
White	82%
African American	93%
Latino	93%
Non-College Educated	83%
College Educated	87%
Self-Identified Democrat	90%
Self-Identified Independent/Don't Know	79%
Self-Identified Republican	81%

Wanting more options in supermarkets and restaurants is universal across geographic region:



11. A majority of consumers also want more animal welfare-conscious products in schools. Sixty-two percent of consumers want more of these products in schools, and the desire extends across geographic region:



- 12. Even more than consumers overall, the rising generation of consumers want more animal welfare-conscious products. A strong majority of people who are young parents or who are recent college graduates want more animal welfare-conscious products in schools. Seventy-eight percent of parents under age 40 and 75% of college educated consumers under age 40 would like more of these products available.
- 13. Consumers want more options in choosing higher welfare products in supermarkets, restaurants, and schools regardless of whether it means a moderate price increase. Half of the survey respondents were asked if they wanted more higher welfare options in various places and half were asked the same question with the addition of, "even if it means a moderate increase in price." There was no significant difference in the desire for more product options whether increase in price was included or not:

Location	% Who would like More Options of Products	% Who would like More Options of Products Even with Moderate Price Increase
Supermarkets	84%	81%
Restaurants	76%	75%
Schools	60%	64%

14. Consumers are contemplating changes to their diets that will impact the market for welfare-certified and plant-based food. A majority of consumers reported someone in their household is considering increasing their consumption of humanely raised meat, eggs, or dairy products. Increasing consumption of vegetarian food is likely in half the households, and one in seven reports someone in the household becoming a vegetarian, with one in 10 indicating someone considering becoming vegan.

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<sup>&</sup>lt;sup>1</sup> Lake Research Partners designed and administered this survey of 1,000 American adult consumers who purchase or consume meat, eggs, or dairy products. Respondents were screened so that only those who ever purchase meat, eggs, or dairy products could be surveyed. The survey was conducted over the Internet from a national sample of internet users. The nationwide survey was conducted July 19 - 23, 2018. The margin of error for the total sample is +/- 3.1%. To allow for comparisons over time, the methods paralleled those used in the 2016 survey noted in footnote iii below.

ii Generally speaking, how concerned are you about the welfare of animals that are raised as food for people to eat?

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iv "Other" types of grocers are stores that did not fit in the three main categories listed and were reported in low frequencies. Examples of these types of stores included farmers markets, dollar stores, and commissaries.