

Consumer expectations on animal welfare in organic and low-input outdoor production:

Insights from a consumer survey

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Aim and data of the study

- To examine citizens' reactions to new approaches to pig and poultry production, with special attention to animal welfare-related measures
- Quantitative survey implemented in February 2021 in nine European countries, i.e., Finland, UK, France, Denmark, the Netherlands, Belgium, Germany, Italy, Romania
- Altogether 3601 responses from nine countries, the survey sample was representative in each country's adult population
- Themes of the survey were Consumption, Purchase, Farming methods and welfare, Welfare and the purchase decision + Background information



Results to be shown in this presentation

- First, some examples on how European consumers perceive (Theme: Farming methods and welfare)
 - Conventional indoor production
 - Organic production
 - Non-organic outdoor (i.e., free-range) production
- Second, some examples on what can be found with more profound statistical analysis on Themes: Purchase & Welfare and the purchase decision
 - Egg purchasing preferences among consumers in nine countries
 - Trust among consumers on different actors as information sources for animal welfare in nine countries



Theme: Farming methods
conventional indoor

How do you perceive the welfare of the animals? (Medians)

	Unpleasant / Pleasant	Bad / Good	Life / Welfare	Unethical / Ethical
FI	3.00			2.00
DK	3.00			3.00
RO	4.00			4.00
GB	2.00			2.00
DE	2.00			2.00
BE	2.00	2.00		2.00
NL	3.00	3.00	3.00	3.00
FR	2.00	2.00	2.00	2.00
IT	2.00	2.00	2.00	2.00
All	2.00	2.00	3.00	3.00

For most of the countries, consumers had either "neutral" or "negative" perceptions on **conventional indoor** production of poultry and pigs (Romania exception with "positive" views)

Theme: Farming methods
production of poultry

How do you perceive organic

	Unpleasant / Pleasant	Bad / Good	Life / Death	Unethical / Ethical
FI	4.00			4.00
DK	4.00			4.00
RO	4.00			4.00
GB	4.00			4.00
DE	4.00			4.00
BE	4.00	4.00	4.00	4.00
NL	4.00	4.00	4.00	4.00
FR	4.00	4.00	4.00	4.00
IT	4.00	4.00	4.00	4.00
All	4.00	4.00	4.00	4.00

In all countries, consumers had "positive" perceptions on **organic production** compared to conventional indoor production

Theme: Farming methods you perceive non-organic outdoor production (Medians)

	Unpleasant / Pleasant	Balanced	Safe / Unsafe	Unethical / Ethical
FI	4.00			4.00
DK	4.00			4.00
RO	4.00			4.00
GB	4.00			4.00
DE	3.00			3.00
BE	3.00			3.00
NL	3.00	3.00	3.00	3.00
FR	4.00	4.00	4.00	4.00
IT	4.00	4.00	4.00	4.00
All	4.00	4.00	3.00	4.00

In all countries, consumers had "neutral or "positive" perceptions on **non-organic outdoor (free-range) production**

Methods of analysis

- Exploratory Factor Analysis (EFA) (Extraction method Maximum likelihood, Rotation method Varimax rotation with Kaiser normalization) was used both calculation of results for
 - a) Egg purchasing preferences in nine countries
 - b) Trust among consumers on different actors as information sources for animal welfare in nine countries

a) Egg purchasing preferences (EFA results)

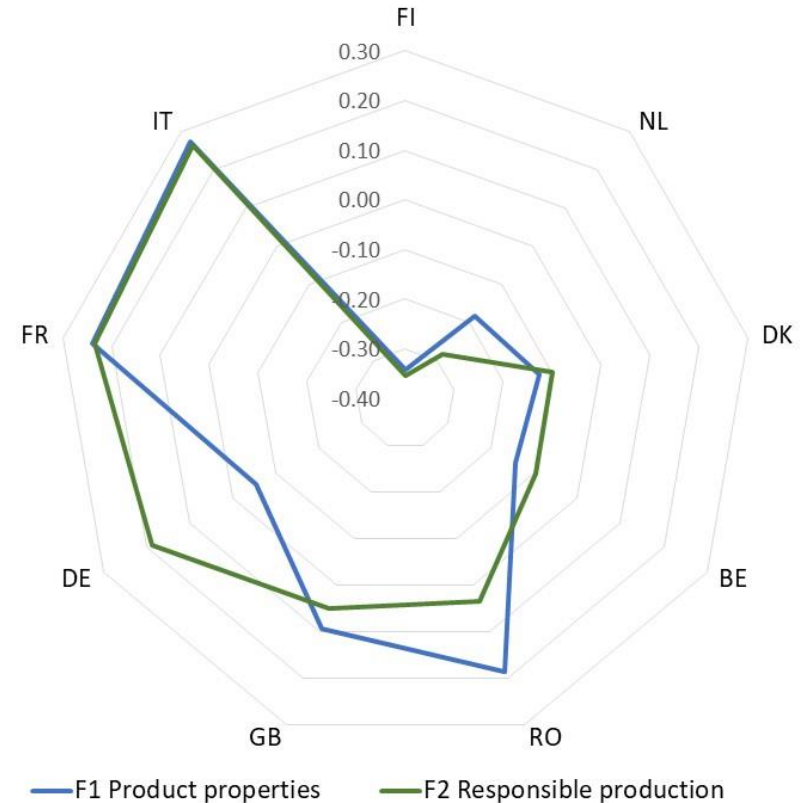
	Communalities (extracted)	F1: Product properties	F2: Responsible production
Animal Welfare Assurance	0.703	0.292	0.786
Production method	0.895	0.227	0.918
Country or region of origin	0.422	0.342	0.552
Date laid or best before date	0.336	0.471	0.338
Appearance	0.454	0.635	0.225
Brand	0.624	0.759	0.220
Packaging	0.554	0.716	0.202
Intended use of product	0.471	0.605	0.322
Retail outlet	0.496	0.648	0.278

Kaiser-Meyer-Olkin Measure of Sampling Adequacy 0.868

Factors explain 65% of the variation in the data

a) Egg purchasing preferences by countries – Preliminary insights on more detailed analysis

- According to EFA factor score averages, consumers in nine countries are quite similar in their egg purchasing patterns
 - Especially in Finland, consumers consider do not have strong opinions either towards Product properties or Responsible production
 - In Netherlands and Romania, consumers have stronger preferences for Product properties
 - In Germany, Responsible production is appreciated more than Product properties



b) Trust among consumers on different actors as information sources for animal welfare

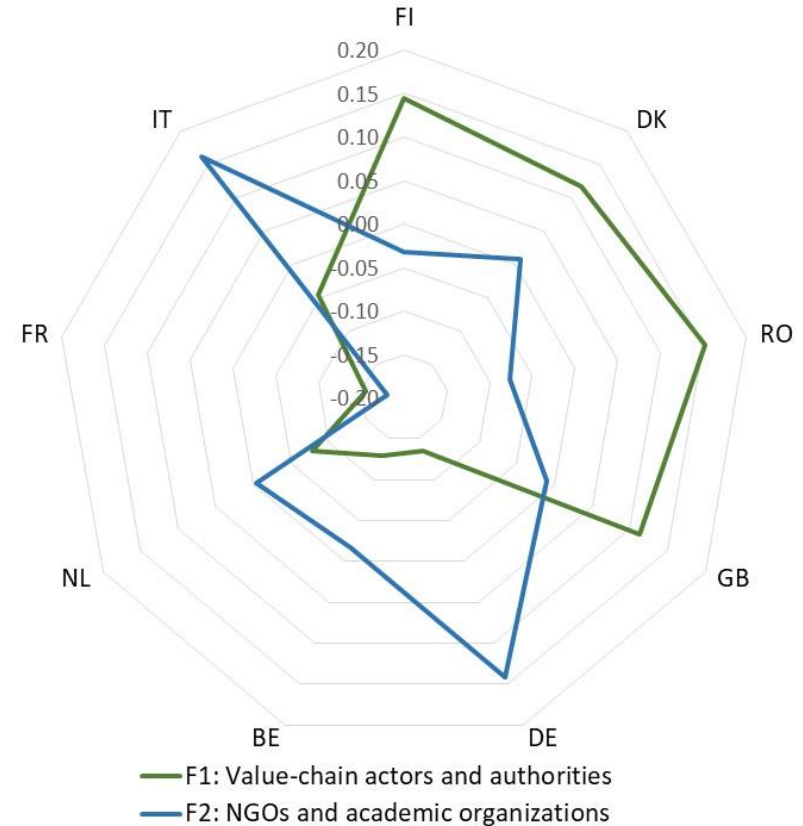
	Communalities (extracted)	F1: Value-chain actors	F2: NGOs and academic organizations
Farmers	0.346	0.547	0.218
Veterinarians	0.320	0.414	0.385
Food retailers	0.614	0.770	0.143
Food processors and manufacturers	0.691	0.825	0.103
Authorities	0.368	0.501	0.343
Interests groups	0.423	0.547	0.352
Civil society organisations	0.484	0.167	0.675
Universities and research organisations	0.466	0.158	0.664
Consumer organisations	0.548	0.200	0.713
Associations of organic production	0.530	0.288	0.669

Kaiser-Meyer-Olkin Measure of
Sampling Adequacy 0.837

Factors explain 66% of
the variation in the data

b) Trust among consumers on different actors as information sources for animal welfare – Preliminary insights on more detailed analysis

- According to EFA factor score averages, consumers in nine countries differ considerably in their trust
 - In Finland, Denmark, Romania and Great Britain more trust in Value-chain actors than NGOs and academic organizations
 - In Germany, Belgium, Netherlands and Italy more trust in NGOs and academic organizations
 - In France the general level of trust low for all actors



Summary of the results

- Consumers appreciate organic and non-organic outside (free-range) production of poultry and pigs over conventional production methods
- Consumers have general food purchasing patterns (in this presentation eggs), which especially relate to preferences on responsible consumption (i.e., Animal Welfare Assurance, Country or region of origin, Production method) and more “traditional” preferences for product properties
- Consumers trust general Value-chain actors or NGOs and academic organizations as information sources for animal welfare – However, by countries the level of trust in actors differ considerably!

Concluding remarks

- In marketing of poultry and pork products, consumers with different preferences for product and production characteristics must be recognized
- Especially important is to understand how the ones without special preferences for “responsible production” could be connected with valuation of “responsible production” (e.g., new approaches to marketing with branding, packaging...)
- For efficient communication of animal welfare issues, selection of communicators and communication channels is of a critical value
- Especially important is to recognize the country-wise differences and their reasons – By choosing “wrong” actors as communicators, there may even be a risk for prejudices against animal welfare efforts in poultry and pork production



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