

ALBERTA FARM ANIMAL CARE

ALBERTA CONSUMER RESEARCH

MARCH 27, 2015

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AGENDA

**ALBERTA
CONSUMERS**

**INDUSTRY
PERCEPTIONS**

**FUTURE
EDUCATION**

METHODOLOGY

BACKGROUND:

- Alberta Farm Animal Care (AFAC) has developed into the collective voice of the livestock industry on matters of livestock welfare in Alberta. In 2014, AFAC initiated a research project designed to explore the perceptions of consumers regarding animal health and welfare.

METHODOLOGY:

- Phase one involved 60-75min in-depth qualitative interviews with a sample of 15 Alberta residents between the ages of 16 and 69 years, using the theoretical framework of morphological market research.
- Phase two involved a quantitative survey administered with a online sample of 742 Alberta residents between the ages of 15 and 69.
- The sample was stratified and weightings were employed to balance demographics, ensure that the sample's composition reflects that of the Alberta population according to 2011 Census data and to provide results intended to approximate the sample universe.
- While sampling error cannot be estimated for non-probability samples such as the sample used to conduct this survey, a traditional unweighted probability sample of comparable size would have produced results considered accurate to within plus or minus 3.6 percentage points, 19 times out of 20.

QUALITATIVE INTERVIEWS		
Variable	Counts	
16-29	3	
30-49	9	
50-69	3	
Female	9	
Male	6	
TOTAL	15	
QUANTITATIVE INTERVIEWS		
Variable	Counts	MOE
15-29	163	± 7.7%
30-49	292	± 5.7%
50-69	287	± 5.8%
Female	376	± 5.1%
Male	364	± 5.1%
Other	2	--
Edmonton	313	± 5.5%
Calgary	287	± 5.8%
Regional	142	± 8.2%
TOTAL	742	± 3.6%

ALBERTA CONSUMERS

THE CONSUMER IN TENSIONS

CONSUMERS HAVE COMPLICATED & CONTRADICTIONARY FEELINGS

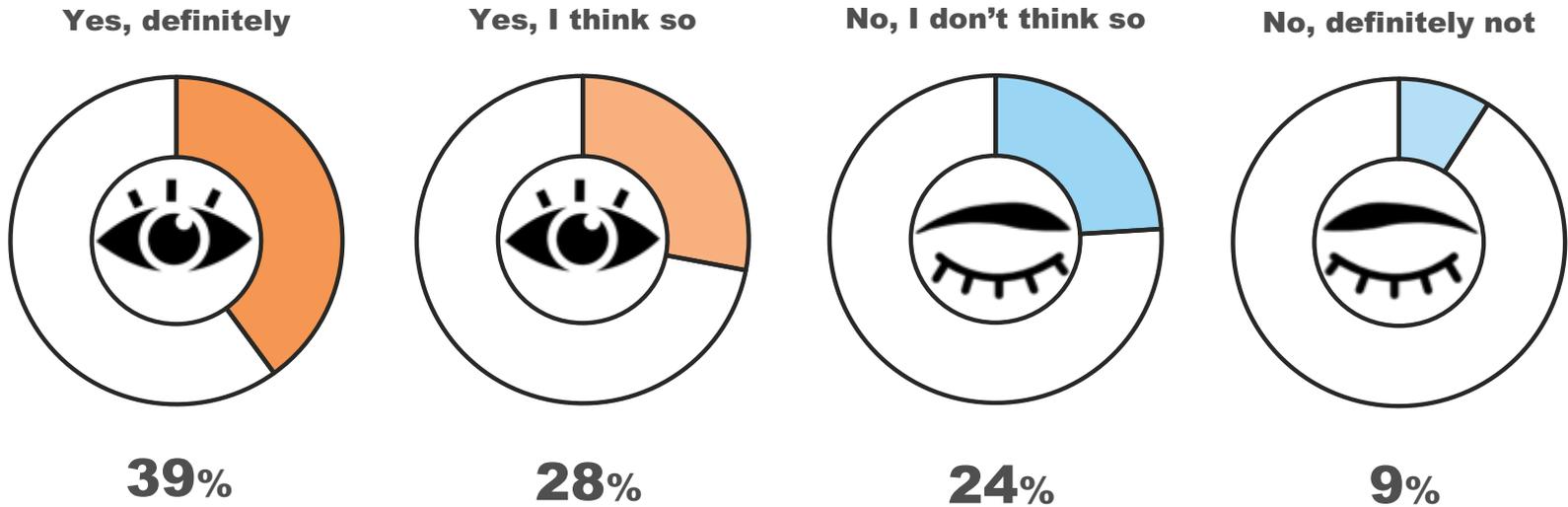
“I have this whole ‘ignorance is bliss’ thing around meat. I don’t want to watch anything that will put me off eating these things. I’d rather just keep on doing it... I sound like an absolute ditz, but I have too many other things to stress about.” – Female, 18-29

“It sounds wrong, but there’s nothing I want to know. If I don’t know then I don’t worry about it... I’ll be honest, if news broke out that all farms in Alberta were beating cows I’d feel pressure to stop buying beef - and I don’t want to feel that pressure.” – Male 30-49



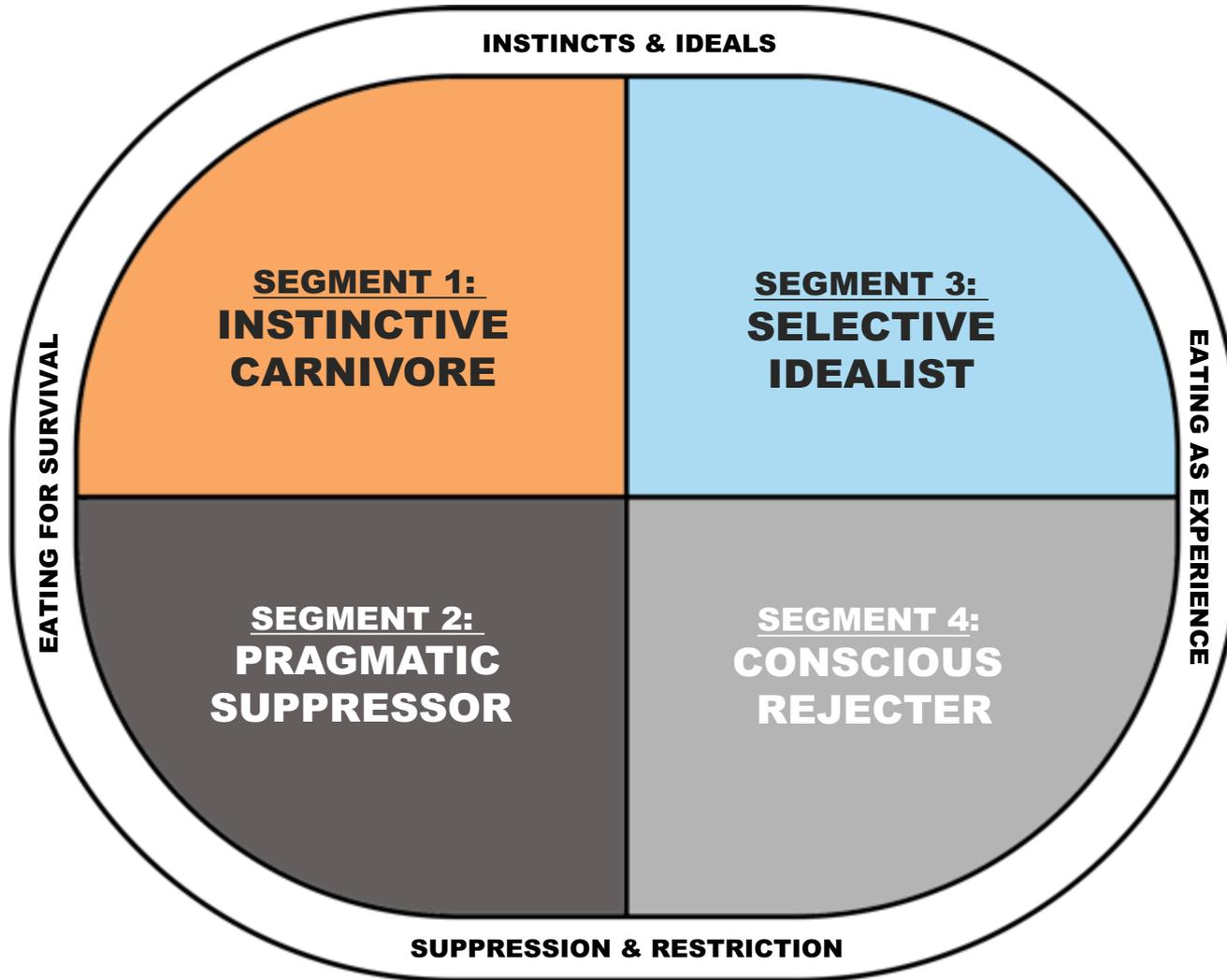
FARM ANIMAL ABUSE STORIES

- 67% of Alberta residents have heard or seen stories of farm animal abuse in the media.

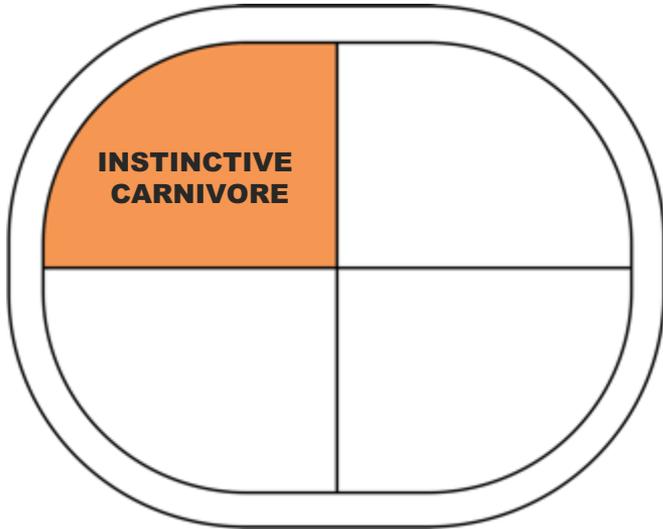


[Q9] Do you recall seeing pictures or hearing stories of farm animals being abused in the news or media (e.g. Newspaper, Television, YouTube)?

ALBERTA INTENSIONS[®] SEGMENTS



SEGMENT 1: INSTINCTIVE CARNIVORE

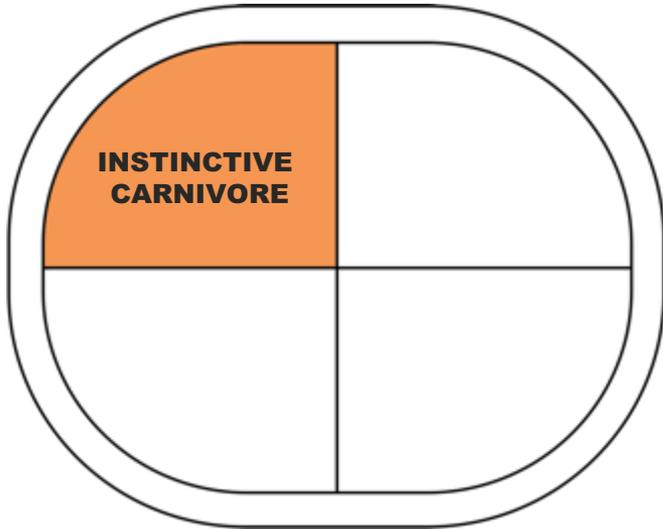


The **INSTINCTIVE CARNIVORE** is driven by the unquestioned and primal instinct to eat and enjoy animal products, including meat, dairy and poultry. These primal instincts will often overpower any other eating behavior or dietary considerations:

“I’m a brutal bastard... I love my meat and I’m not going to change now. I don’t think it’s wrong to feed ourselves. I’m not a hunter, but I could pretty easily butcher a cow or a chicken... I guess that’s just the way I am. It’s the way I’ve grown up. It’s the way I eat. I’m a conservative kind of person.” – Male, 50-69

INSTINCTIVE CARNIVORES will often see farm animals as subservient to the survival and dietary needs of human beings, and appear to show limited interest in considering their health and welfare.

SEGMENT 1: INSTINCTIVE CARNIVORE



29% OF MEAT CONSUMERS IN ALBERTA



- More likely to be male (↑37%)
- More likely to be older 50-69 (↑35%)
- 1st average servings of meat (7.02)

31% OF POULTRY CONSUMERS IN ALBERTA



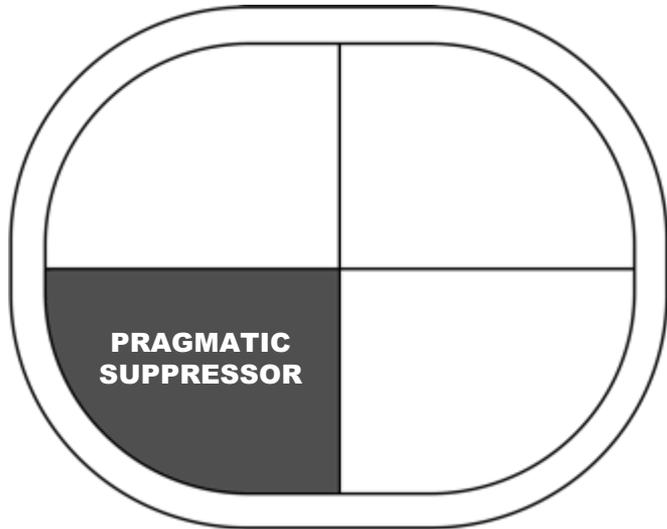
- More likely to be male (↑36%)
- More likely to be older 50-69 (↑36%)
- 1st average servings of poultry (7.34)

39% OF DAIRY CONSUMERS IN ALBERTA



- Largest dairy segment
- More likely to be male (↑44%)
- More likely to be older 50-69 (↑41%)
- 1st average servings of dairy (11.66)

SEGMENT 2: PRAGMATIC SUPPRESSOR

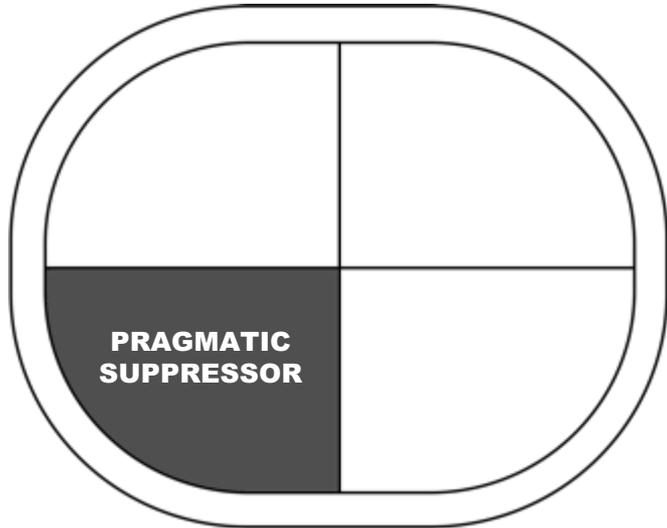


The **PRAGMATIC SUPPRESSOR** is driven by practical need to provide affordable meals and avoid any disruption to their daily eating habits. These basic survival motivations will often lead them to ignore less immediate dietary considerations:

“It does bother me, but it wouldn’t affect me to the point where I would change our eating habits. For me, the health benefits of eating animal products outweigh any ethical considerations. Also, I have a budget and I can’t afford to spend any more money on our food.” – Female, 30-49

PRAGMATIC SUPPRESSORS will often attempt to ignore or suppress concerns around the health and welfare of farm animals, because acknowledging these concerns may disrupt their ability to maintain their eating habits and grocery budget.

SEGMENT 2: PRAGMATIC SUPPRESSOR



38% OF MEAT CONSUMERS IN ALBERTA



- Largest meat segment
- Gender neutral
- More likely to be young 15-29 (↑51%)
- 2nd average servings of meat (6.37)

38% OF POULTRY CONSUMERS IN ALBERTA



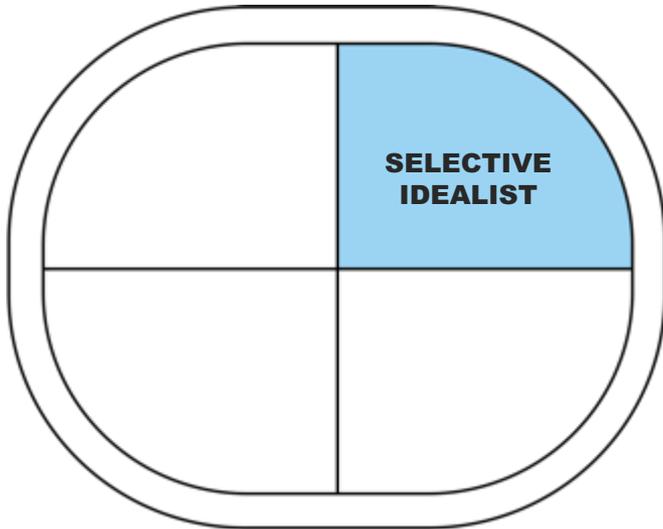
- Largest poultry segment
- Gender neutral
- Age neutral
- 2nd average servings of poultry (7.20)

29% OF DAIRY CONSUMERS IN ALBERTA



- Gender neutral
- Age neutral
- 2nd average servings of dairy (11.12)

SEGMENT 3: SELECTIVE IDEALIST

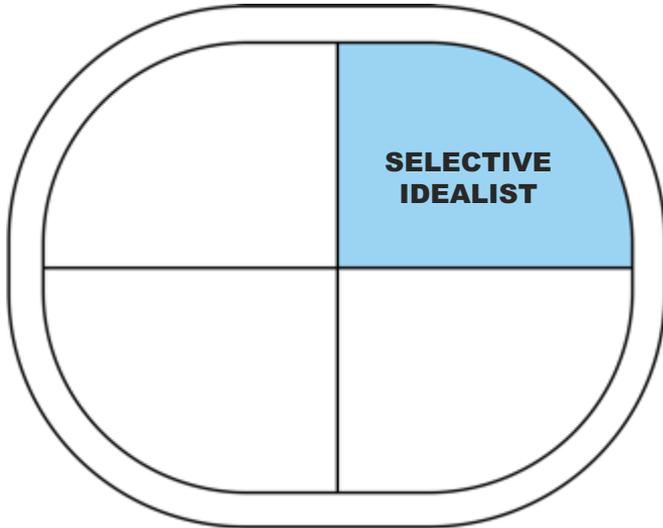


The **SELECTIVE IDEALIST** is driven by the desire to enhance the emotional and taste experience surrounding their eating behaviour. Incorporating their ideals into the purchase process can help remove feelings of guilt that disrupt their eating pleasure:

“I usually look for the organic chicken. It gives me a little bit of comfort knowing that they’re not eating all that junk; they’re just regular chickens on a farm. Same with the eggs, I usually go for the organic eggs... Knowing that they’re organic makes it seem a little bit less sketchy.” – Female, 18-29

SELECTIVE IDEALISTS will often consider topics of animal health and welfare when making their purchasing and eating decisions.

SEGMENT 3: SELECTIVE IDEALIST



24% OF MEAT CONSUMERS IN ALBERTA



- More likely to be female (↑29%)
- Age neutral
- 3rd average servings of meat (5.04)

25% OF POULTRY CONSUMERS IN ALBERTA



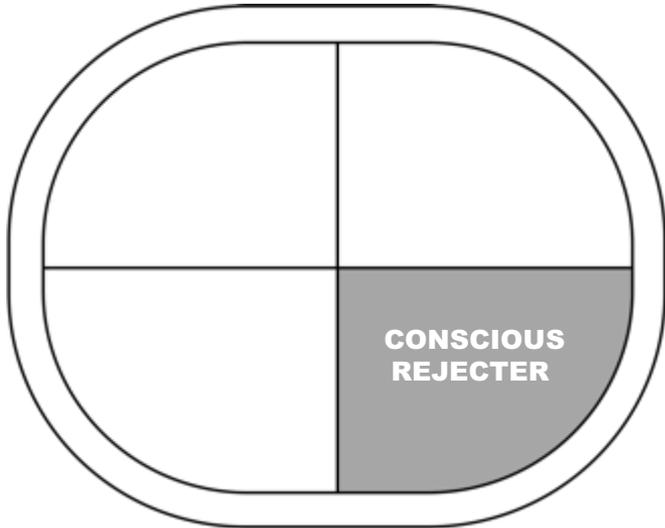
- Gender neutral
- Less likely to be older 50-69 (↓20%)
- 3rd average servings of poultry (6.76)

20% OF DAIRY CONSUMERS IN ALBERTA



- Gender neutral
- Age neutral
- 3rd average servings of dairy (8.89)

SEGMENT 4: CONSCIOUS REJECTER

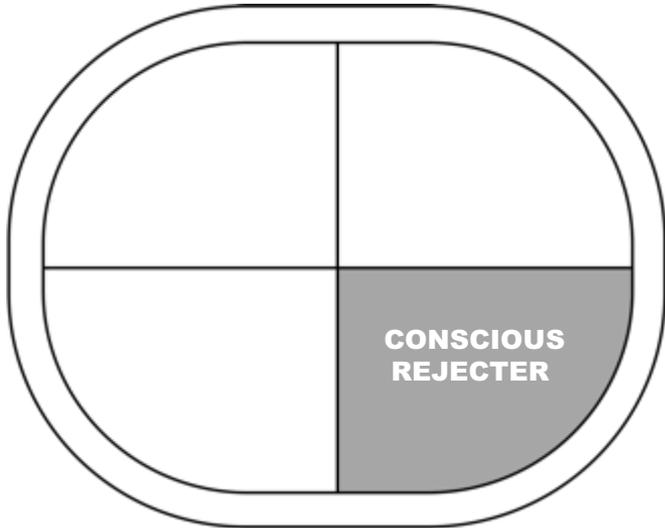


The **CONSCIOUS REJECTER** is driven by the ethical or health-related need to control their consumption of animal products. In addition to vegetarian and vegan consumers, this can also include individuals with dietary restrictions and allergies:

“I read ‘Diet for a New America,’ and it talked about how milk was processed in these farms, and how eggs were collected, and how chickens were being treated and it left a very deep impression that I’ve never been able to sever myself from.” – Female, 30-49

CONSCIOUS REJECTERS will often actively reject animal food products because of any ethical or dietary concerns they have.

SEGMENT 4: CONSCIOUS REJECTER



3% OF MEAT CONSUMERS IN ALBERTA



- Gender neutral
- Age neutral
- 4th average servings of meat (1.61)

3% OF POULTRY CONSUMERS IN ALBERTA



- Gender neutral
- Age neutral
- 4th average servings of poultry (3.05)

6% OF DAIRY CONSUMERS IN ALBERTA



- Gender neutral
- More likely to be young 15-29 (↑11%)
- 4th average servings of dairy (4.04)

INDUSTRY PERCEPTIONS

GENERAL FARM PERCEPTIONS

CONSUMERS FELT NATURAL SPACE IN ALBERTA HELPED ANIMAL WELFARE

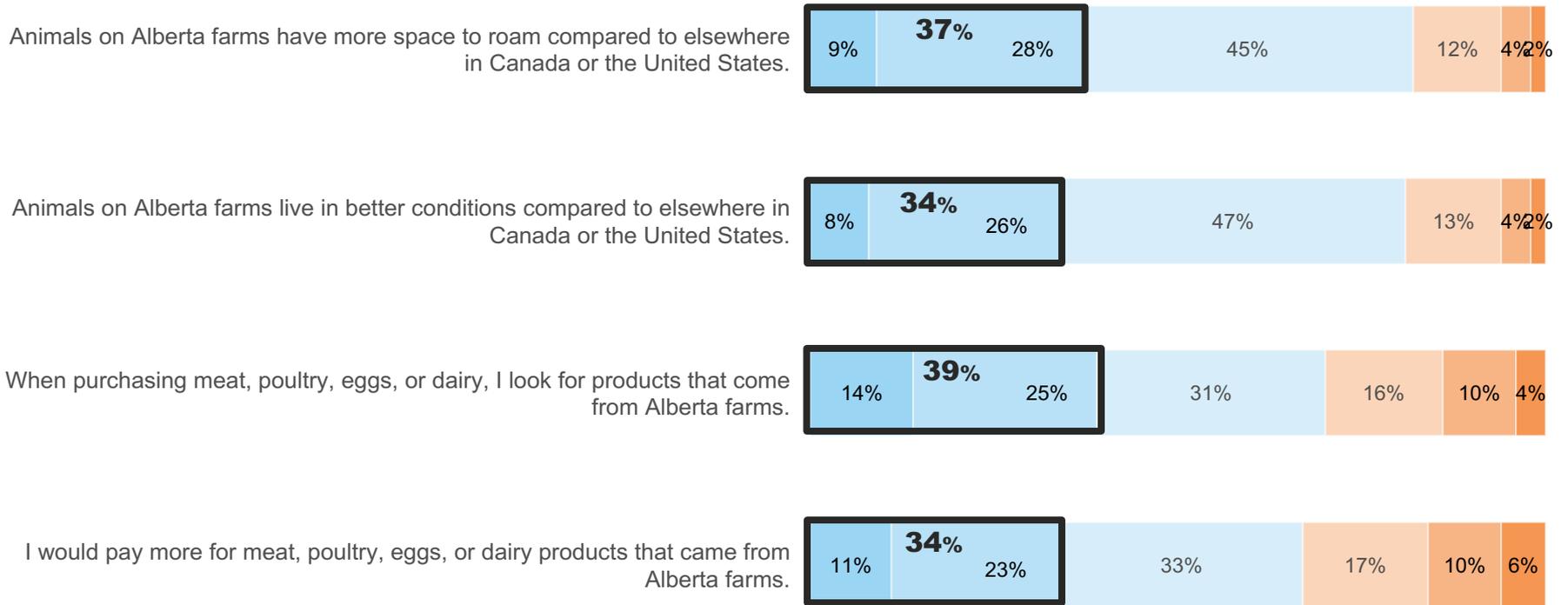
“I feel they probably have a pretty good life at these farms in Alberta. From what I see on the highway they’re roaming free and not stuck in these tiny little cubes.” – Female, 18-29



GENERAL FARM PERCEPTIONS

- On average, **39%** of Alberta residents agree or strongly agree that **they look** for animal products that come from Alberta – **34%** would **pay more** for animal products from Alberta.

■ Strongly agree
 ■ Agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Disagree
 ■ Strongly disagree



[Q4] Do you agree or disagree with the following about farm animals in Alberta?

LIVING SPACE PERCEPTIONS



CONSUMERS EXPRESSED CONCERNS AROUND ANIMAL CONFINEMENT

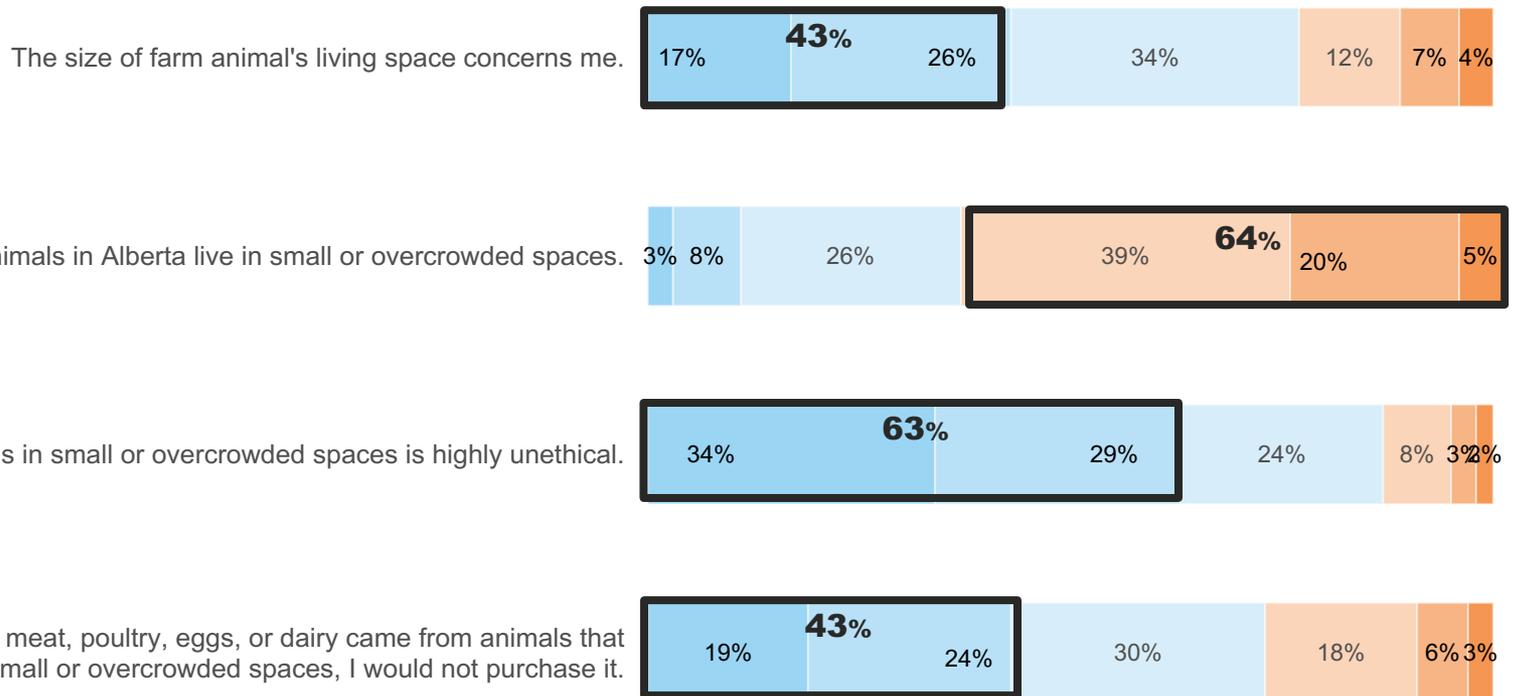
“Chickens that are in the little cages in the big warehouses... I have no idea if that’s a realistic view of egg farming, but that would concern me.”

– Male 18-29

LIVING SPACE PERCEPTIONS

- On average, the **majority** of Alberta residents (**64%**) disagree that farm animals in Alberta live in small or overcrowded spaces.

■ Strongly agree
 ■ Agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Disagree
 ■ Strongly disagree



[Q5] Do you agree or disagree with the following about farm animals living in small or overcrowded spaces (i.e. small or overcrowded pens or cages)?

LIVING SPACE PERCEPTIONS

- On average, **women** are **significantly more** likely to agree or strongly agree with three of these living space statements.

% Agree/Strongly Agree



■ Significantly more
■ Significantly less
■ Statistically similar

[Q5] Do you agree or disagree with the following about farm animals living in small or overcrowded spaces (i.e. small or overcrowded pens or cages)?

SUPERFARM PERCEPTIONS



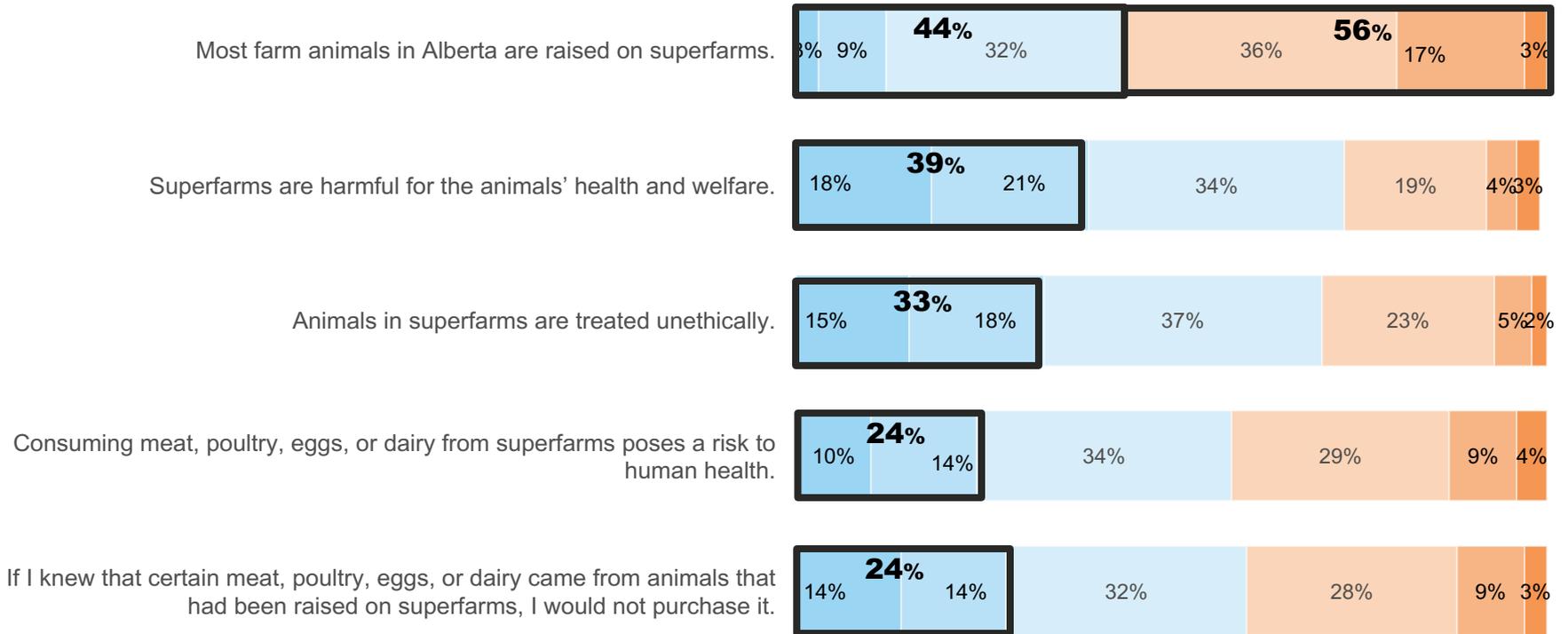
CONSUMERS EXPRESSED CONCERNS AROUND SUPERFARMS

“Maybe I need to get over the appearance of the superfarms... but I don’t think we’ve studied the ramifications. I’m sure superfarms are a great idea in terms of producing protein, but we need to keep an eye on the social, animal husbandry and environmental issues.” – Male, 50-69

SUPERFARM PERCEPTIONS

- The **majority** of Alberta residents (**56%**) **disagree** that most farm animals are raised on superfarms – but **agree** that superfarms are harmful to animals’ health and welfare.

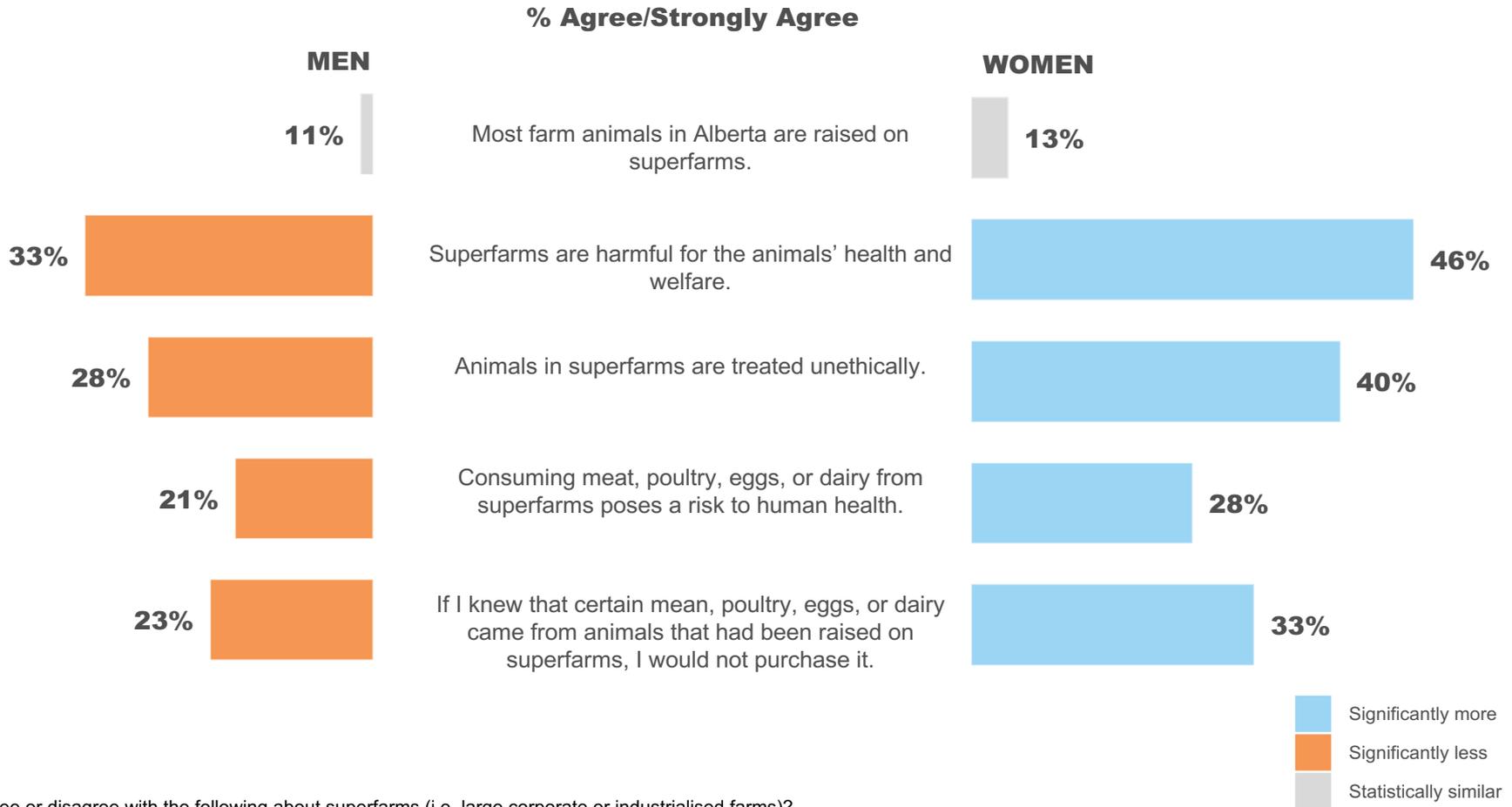
Strongly agree Agree Somewhat agree Somewhat disagree Disagree Strongly disagree



[Q6] Do you agree or disagree with the following about superfarms (i.e. large corporate or industrialised farms)?

SUPERFARM PERCEPTIONS

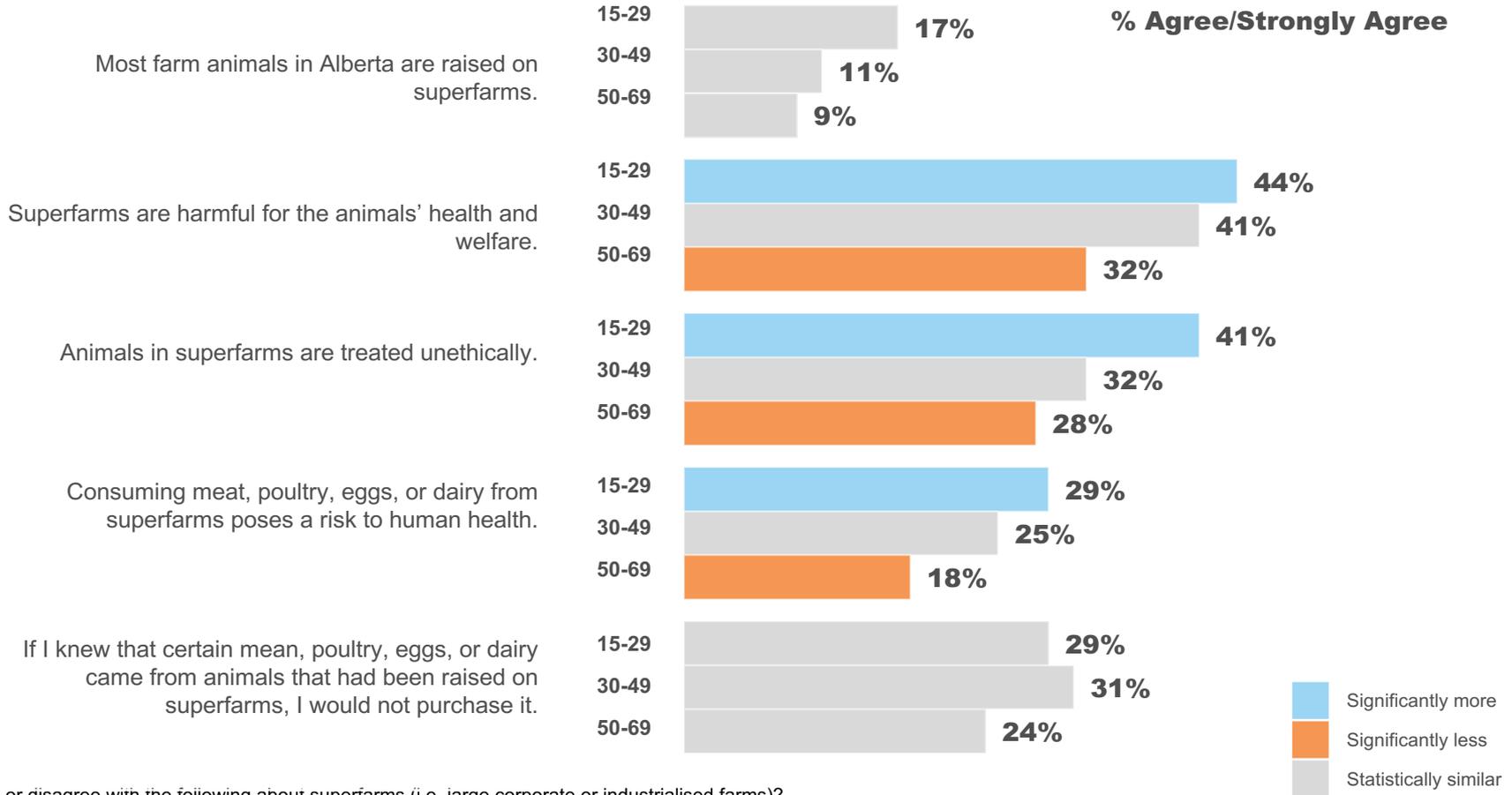
- On average, **women** are **significantly more** likely to agree or strongly agree with four of these superfarm statements.



[Q6] Do you agree or disagree with the following about superfarms (i.e. large corporate or industrialised farms)?

SUPERFARM PERCEPTIONS

- On average, **youth (aged 15-29)** are **significantly more** likely to agree or strongly agree with three of these superfarm statements.



[Q6] Do you agree or disagree with the following about superfarms (i.e. large corporate or industrialised farms)?

HORMONE & ANTIBIOTIC PERCEPTIONS



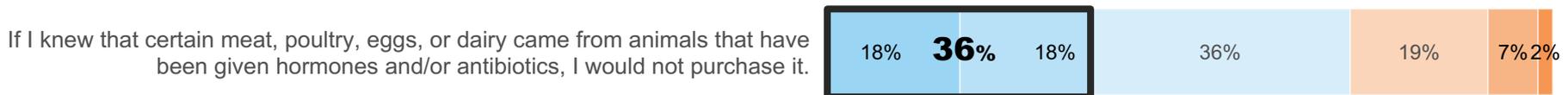
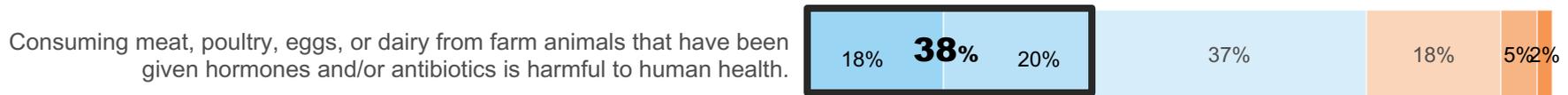
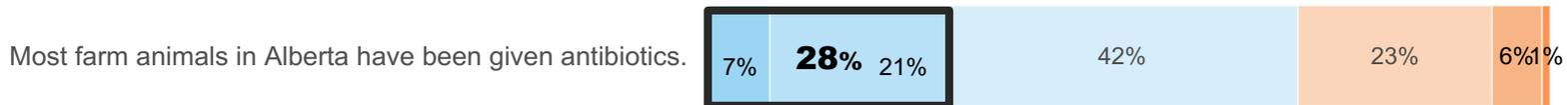
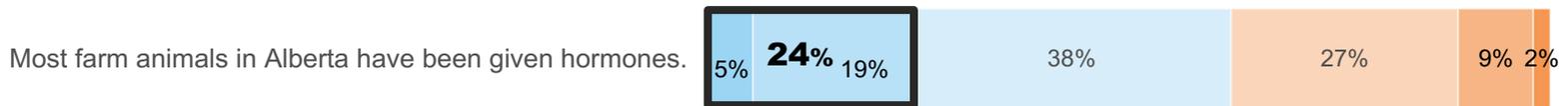
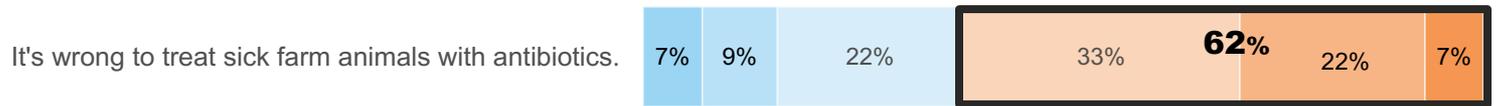
CONSUMERS EXPRESSED CONCERNS AROUND THE USE OF HORMONES & ANTIBIOTICS

“The hormones and supplements and steroids and foreign drugs we put into their bodies needs to be limited or governed by an actual body that cares and isn’t subsidized by the rancher’s association.” – Female, 30-49

HORMONE & ANTIBIOTIC PERCEPTIONS

- Around a quarter of Alberta residents agree or strongly agree that most Alberta farm animals have been given **hormones (24%)** or **antibiotics (28%)**

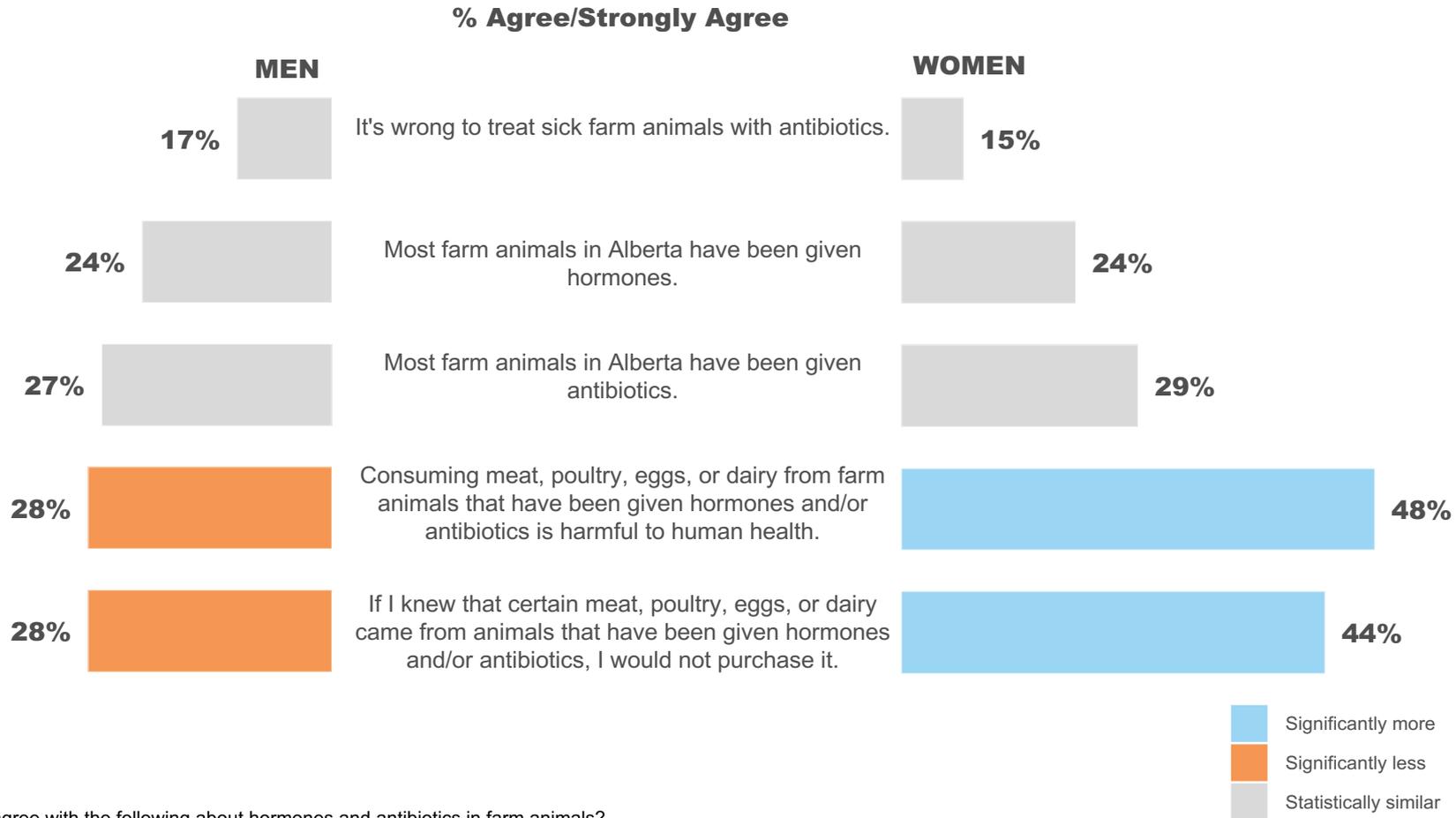
■ Strongly agree
 ■ Agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Disagree
 ■ Strongly disagree



[Q7] Do you agree or disagree with the following about hormones and antibiotics in farm animals?

HORMONE & ANTIBIOTIC PERCEPTIONS

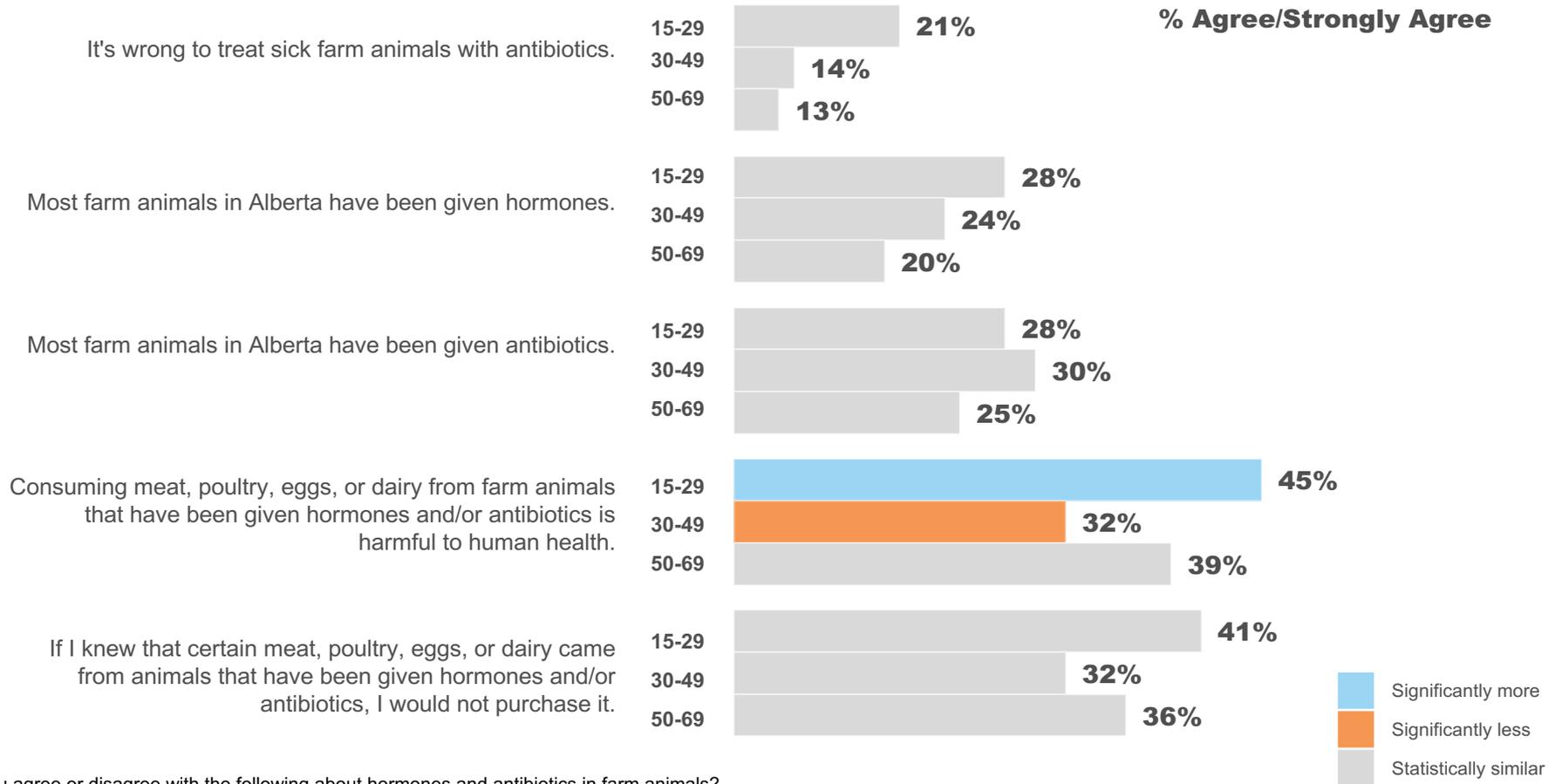
- On average, **women** are **significantly more** likely to agree or strongly agree with two of these hormone and antibiotic statements.



[Q7] Do you agree or disagree with the following about hormones and antibiotics in farm animals?

HORMONE & ANTIBIOTIC PERCEPTIONS

- On average, youth (aged 15-29) are significantly more likely to agree or strongly agree with one of these hormone and antibiotic statements.



[Q7] Do you agree or disagree with the following about hormones and antibiotics in farm animals?

SLAUGHTER & HANDLING PERCEPTIONS



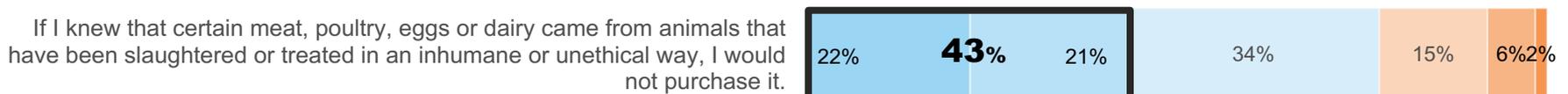
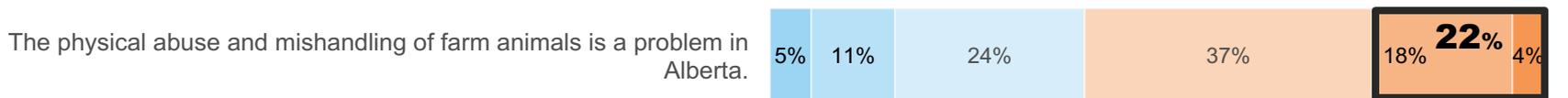
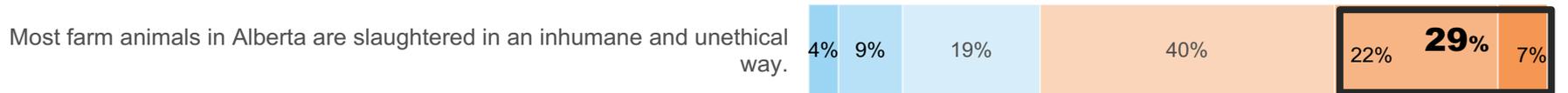
CONSUMERS EXPRESSED CONCERNS AROUND THE SLAUGHTER & HANDLING PROCESS

“I’ve seen a couple of video clips where a farmer was hitting or physically abusing an animal, because it wasn’t complying or moving where it was supposed to go... You can’t help but feel for the animal.” – Male, 30-49

SLAUGHTER & HANDLING PERCEPTIONS

- While Alberta residents care about the slaughter and treatment of farm animals, **the majority do not believe** that slaughter or treatment practices in Alberta are inhumane or unethical.

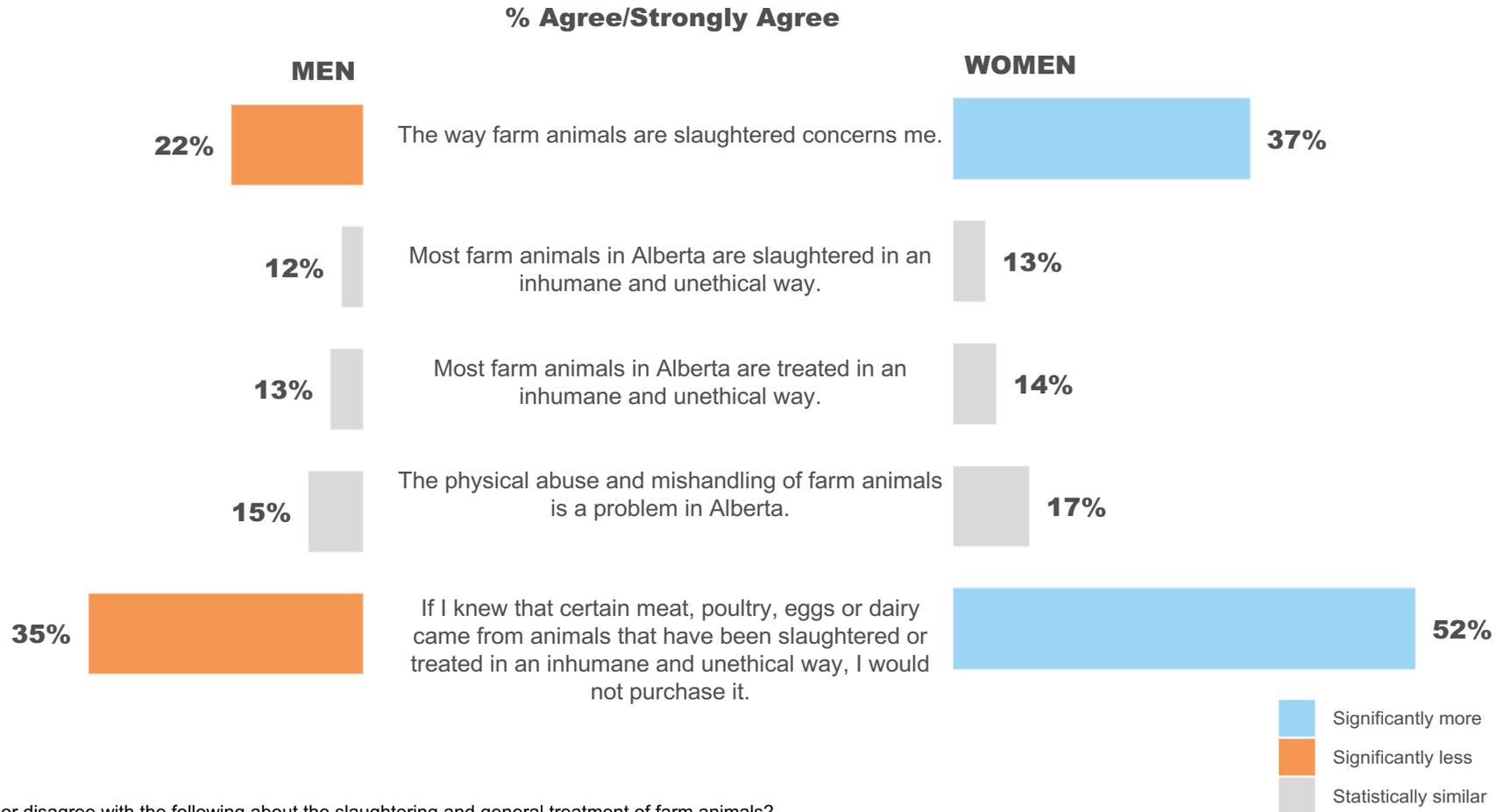
■ Strongly agree
 ■ Agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Disagree
 ■ Strongly disagree



[Q8] Do you agree or disagree with the following about the slaughtering and general treatment of farm animals?

SLAUGHTER & HANDLING PERCEPTIONS

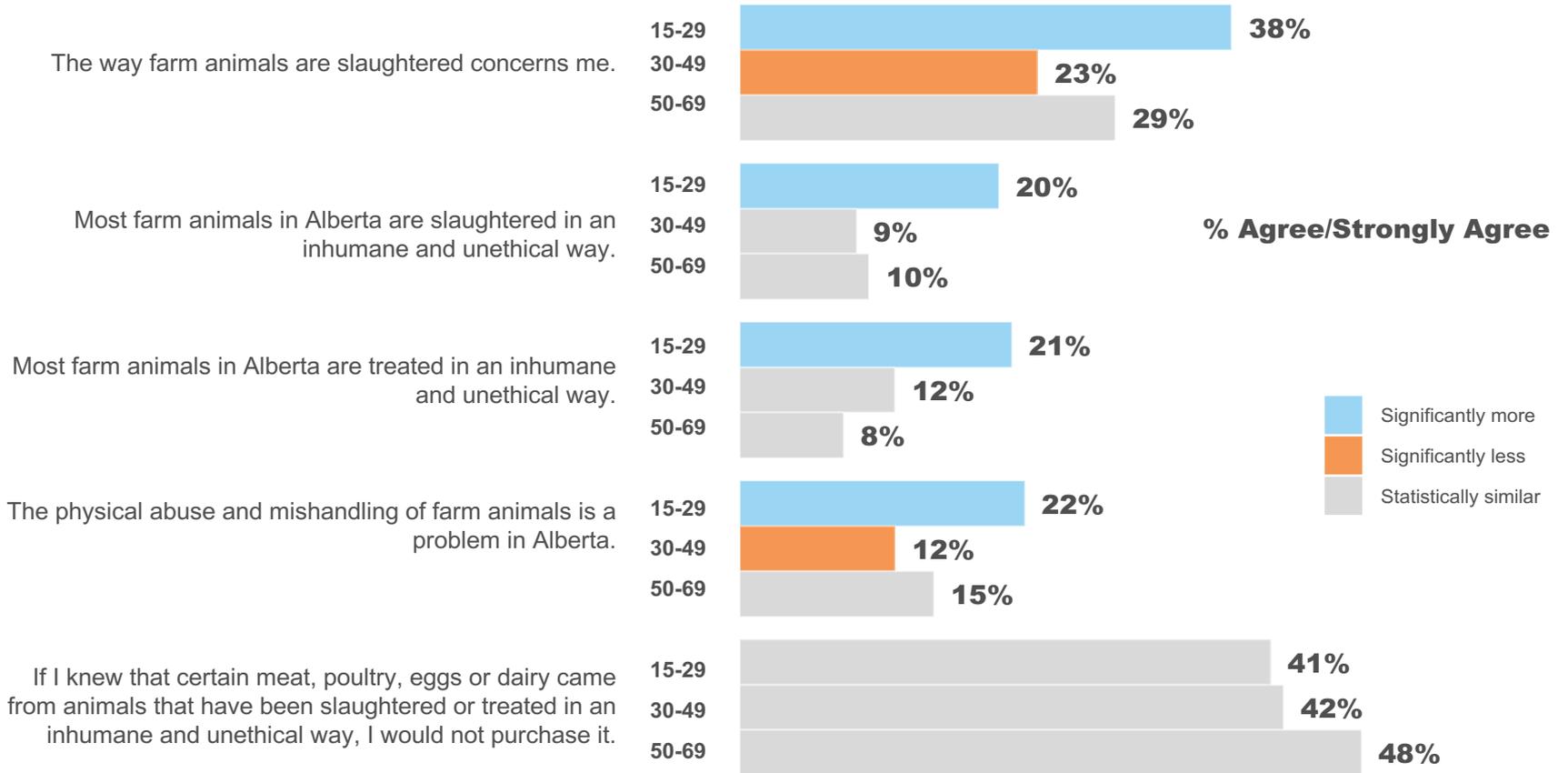
- On average, **women** are **significantly more** likely to agree or strongly agree with two of these slaughtering and treatment statements.



[Q8] Do you agree or disagree with the following about the slaughtering and general treatment of farm animals?

SLAUGHTER & HANDLING PERCEPTIONS

- On average, **youth (aged 15-29)** are **significantly more** likely to agree or strongly agree with **four** of these slaughter and handling statements.



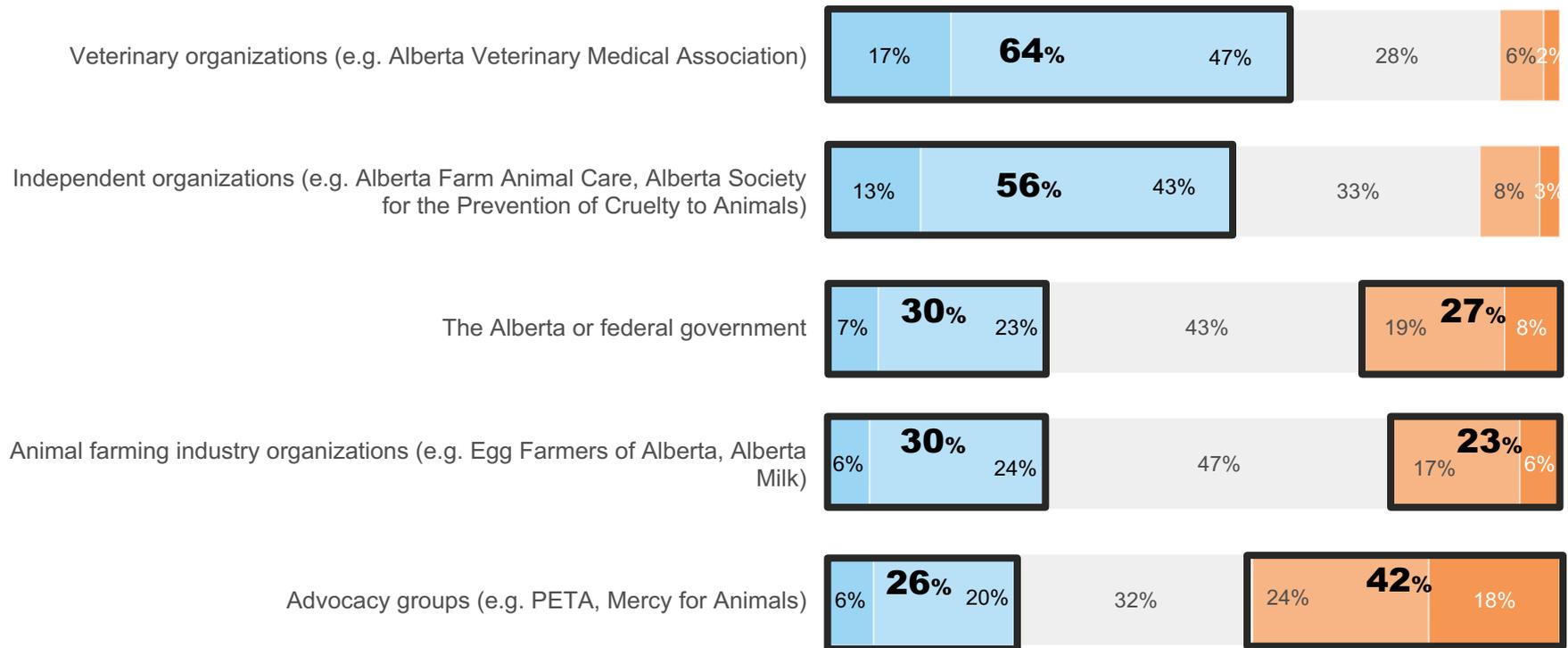
[Q8] Do you agree or disagree with the following about the slaughtering and general treatment of farm animals?

FUTURE EDUCATION

INFORMATION SOURCES

- On average, Alberta residents are **most likely to trust** farm animal information that comes from **Veterinary Organizations (64% trust)** or **Independent Organizations (56% trust)**.

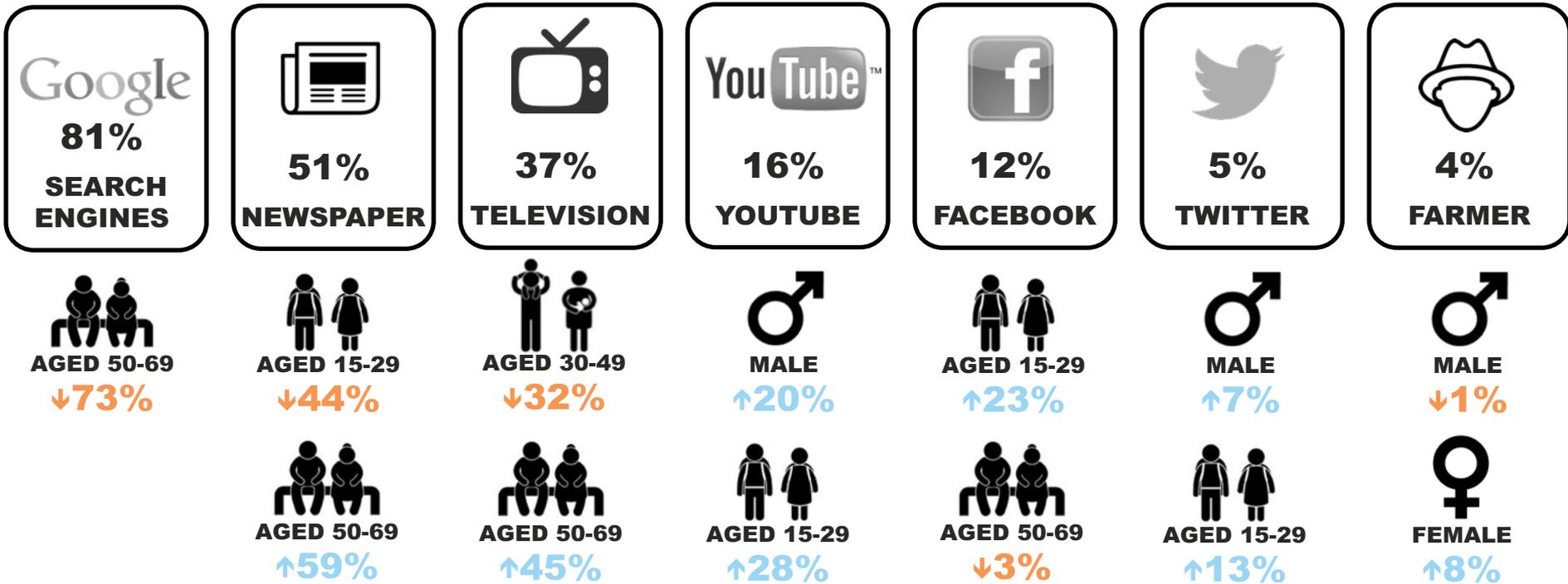
■ 5 (I would trust completely) ■ 4 ■ 3 ■ 2 ■ 1 (I would not trust at all)



[Q10] If you wanted to learn about the health and welfare of farm animals in Alberta, would you trust the following sources, or no?

INFORMATION SOURCES

- When looking for information about farm animal health and welfare, Alberta residents would most likely turn to **Search Engines (81%)**, **Newspapers (51%)** and **Television (37%)**.



[Q11] If you wanted to learn about the health and welfare of farm animals in Alberta, where would you look for information? Select all that apply.

FOUR CONSUMER EDUCATION FACTS

1

ON AVERAGE, ALBERTA RESIDENTS WHO ARE YOUNGER (15-29) AND/OR FEMALE HAVE THE STRONGEST NEGATIVE BELIEFS ABOUT FARM ANIMAL HEALTH AND WELFARE, BUT WILL OFTEN CHOOSE TO SUPPRESS OR IGNORE THEIR BELIEFS

2

ALBERTA RESIDENTS ARE MOST CONCERNED BY ANIMAL OVERCROWDING (63%), ANIMAL LIVING SPACE (43%), SUPERFARM IMPACT ON ANIMALS (39%), AND HORMONE & ANTIBIOTIC IMPACT ON HUMAN HEALTH (38%)

3

ALBERTA RESIDENTS ARE MOST LIKELY TO TRUST INFORMATION FROM VETERINARY ORGANIZATIONS (64%) AND INDEPENDENT ORGANIZATIONS LIKE AFAC OR ASPCA (56%)

4

ALBERTA RESIDENTS ARE MOST LIKELY TO LOOK FOR INFORMATION IN ONLINE SEARCH ENGINES (81%), NEWSPAPERS (51%), TELEVISION (37%) AND YOUTUBE (16%)

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