



# Animal Welfare Institute

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## Consumer Perceptions of Farm Animal Welfare

*American consumers are increasingly aware of, and concerned about, how animals raised for food are treated. Below are brief summaries of recent research conducted on consumer perceptions of farm animals and their welfare.*

### **Americans care about how farm animals are raised**

- Approximately three-quarters of respondents to a 2018 survey conducted for the National Chicken Council said they were concerned about how chickens are raised for meat. A similar percentage said they were concerned about how chickens are bred to optimize meat production.  
—*US Chicken Consumption Report*, National Chicken Council, Jul 2018.
- In a survey commissioned by World Animal Protection, 80% of US consumers said they were concerned after learning about the treatment of factory-farmed pigs. Eighty-nine percent of respondents said supermarkets have a responsibility to source pork from higher welfare farms.  
—*New Research Shows Major Global Supermarket Chains at Risk of Losing Customers over Poor Pig Welfare* (news release), Cision PR Newswire, Apr 17, 2018.
- While a majority of respondents to a Center for Food Integrity survey strongly agreed that they have no problem consuming meat, milk and eggs if farm animals are treated “decently and humanely,” only 25% said they believe US meat comes from humanely treated animals.  
—*A Dangerous Disconnect: New Research IDs Food and Ag Trust Gaps*, The Center for Food Integrity, Jan. 9, 2018. <http://www.foodintegrity.org/wp-content/uploads/2018/01/Consumer-Trust-Research-News-Release-Jan-9-FINAL1.pdf>
- Data from the Packaged Facts online consumer survey showed that 26% of consumers strongly agree, and another 32% somewhat agree, that they are becoming more concerned about the treatment of animals raised for food. Only 15% of respondents somewhat or strongly disagreed that animal treatment is of increasing concern.  
—Granderson D, *Heads Up on Humane in Meat and Poultry Industries*, Packaged Facts, Apr 18, 2017. <https://www.packagedfacts.com/Content/Blog/2017/04/18/Heads-Up-on-Humane-in-Meat-and-Poultry-Industries>.
- In a survey conducted for the ASPCA, 77% of consumers said they are concerned about the welfare of animals raised for food.  
—*New Research Finds Vast Majority of Americans Concerned about Farm Animal Welfare* (news release), ASPCA, Jul 7, 2016. <http://www.aspc.org/about-us/press-releases/new-research-finds-vast-majority-americans-concerned-about-farm-animal>.

- The humane treatment of farm animals is very important to more than half of Americans, according to a 2016 Food Marketing Institute shopper survey.  
—Sloan A E, *Eating Responsibly*, Consumer Trends, Vol 70, Dec 2016. <http://www.ift.org/food-technology.aspx>.
- Consumer Reports' Dec. 2015 Natural Food Labels Survey found that better living conditions for farm animals is viewed as "very important" to 52% of consumers and "important" to an additional 32%, in a survey conducted by Opinion Research Corporation.  
—*Natural Food Labels Survey*, Consumer Reports National Research Center, Jan 2016. [http://www.consumerreports.org/content/dam/cro/magazine-articles/2016/March/Consumer\\_Reports\\_Natural\\_Food\\_Labels\\_Survey\\_2015.pdf](http://www.consumerreports.org/content/dam/cro/magazine-articles/2016/March/Consumer_Reports_Natural_Food_Labels_Survey_2015.pdf).
- In a survey conducted by market researcher The Hartman Group, 44% of respondents said they wanted to know more about how food companies treat the animals used in their products. Almost half of consumers (47%) said they support companies that avoid inhumane treatment of animals, a 6 point increase from a similar survey conducted in 2013. In addition, 65% of respondents indicated they want animals raised in as natural environment as possible.  
—*Animal Proteins: The Consumer-Driven Demand for Transparency*, The Hartman Group, Aug 18, 2015. <https://www.hartman-group.com/hartbeat/613/animal-proteins-the-consumer-driven-demand-for-transparency>
- Wal-Mart says its own research showed 77% of its customers said that if a retailer improves the treatment of farm animals, it would increase their trust in the company, and 66% said it would increase their likelihood of shopping at that retailer.  
—E'Innocenzio A, *Wal-Mart's Push on Animal Welfare Hailed as Game Changer*, Associated Press, May 22, 2015. <http://foxbaltimore.com/news/local/wal-mart39s-push-on-animal-welfare-hailed-as-game-changer>
- Nearly 95% of participants in a national survey conducted by American Humane said they are "very concerned" about the welfare of farm animals.  
—*2014 Humane Heartland Farm Animal Welfare Survey*, American Humane Association, Nov 2014. <https://www.americanhumane.org/app/uploads/2016/08/2014-humane-heartland-farm-survey.pdf>.
- In a study conducted by Kansas State University, 65% of consumers reported they were concerned about the welfare of beef cattle in the United States. Only 39% of the public said they believed that U.S. farms and ranches provide appropriate overall care to their cattle.  
—Day C, *Cattle Welfare Perceptions*, Feedstuffs FoodLink, Sep 11, 2014. <http://feedstuffsfoodlink.com/story-cattle-welfare-perceptions-0-117598>.
- Eighty percent (80%) of respondents to a survey conducted by Consumers Reports said they want good living conditions for animals raised for food.  
—Bopp S, *It's Only Natural, But What Does That Mean?*, Drovers CattleNetwork, Aug 27, 2014.
- Roughly two-thirds (69%) of a sample of 1,003 American adults said they prioritize animal welfare as a significant factor in deciding what foods to buy. The survey was

conducted by ORC International in February 2014 for the 2014 Cone Communications Food Issues Trend Tracker.

—Fielding M, *Consumers Want Companies to Provide More Sustainable Food Options*, Meatingplace, Mar 17, 2014.

<http://www.meatingplace.com/Industry/News/Details/48824>.

- In a survey conducted by Texas A&M University, 36% of consumers said that animal welfare was somewhat important to them, while another 22% said it was very important, and 11% said extremely important (for a total of 69%).  
—Grimshaw K et al, *Consumer Perception of Beef, Pork, Lamb, Chicken, and Fish*, Meat Science, Vol 96 (Jan 2014), pp. 443-444.
- A survey of west coast consumers commissioned by the poultry company Foster Farms found that 49% completely agreed that they are more concerned about animal welfare and how animals are raised for food than they were 5 years ago. Also, 74% completely agreed that they would like more large producers to raise animals for food in a humane way.  
—*Foster Farms First Major Poultry Producer in the West to Earn Humane Certification from American Humane Association Meets Increasing Consumer Demand for Humanely Raised Foods* (press release), Foster Farms, Mar 11, 2013. <https://www.prnewswire.com/news-releases/foster-farms-first-major-poultry-producer-in-the-west-to-earn-humane-certification-from-american-humane-association--meets-increasing-consumer-demand-for-humanely-raised-foods-197011261.html>.
- In a survey conducted by the University of Nebraska, 70% of rural Nebraskans agreed or strongly agreed with the statement: “Animal welfare means more than providing adequate food, water and shelter; it also includes adequate exercise, space, and social activities for the animals.” Seventy percent of respondents thought that the welfare of animals is better protected on family farms than on large, corporate farms, and 77% agreed or strongly agreed that food safety is largely dependent on the care farm animals receive.  
—Vogt R et al, *Animal Welfare: Perceptions of Nonmetropolitan Nebraskans*, University of Nebraska—Lincoln, Center for Applied Rural Innovation, Jul 2011.
- Technomic’s food industry trend tracking survey has documented that humane animal treatment is of increasing importance to consumers, with more than 50% now saying this is an important issue to them.  
—*Center of the Plate: Poultry Consumer Trend Report*, Technomic, May 2011.  
[http://www.technomic.com/Reports\\_and\\_Newsletters/Consumer\\_Trend\\_Reports/dyn\\_PubLoad.php?PID=21](http://www.technomic.com/Reports_and_Newsletters/Consumer_Trend_Reports/dyn_PubLoad.php?PID=21).
- In an aided question, consumers responding to a survey conducted for Demeter Communications’ SegmenTrak study were asked to consider what they would like to know from farmers about food production that they currently do not know. More than two-thirds (68%) indicated they wanted to know more about ways farmers “ensure animal care.”  
—*What “Indicator Consumers” Want to Know Most About How U.S. Foods are Produced*, Demeter Communications, Apr 2010. [http://demetercommunications.com/wp-content/uploads/2011/05/FINAL.Demeter.SegemenTrak.Full\\_Report.June2010.pdf](http://demetercommunications.com/wp-content/uploads/2011/05/FINAL.Demeter.SegemenTrak.Full_Report.June2010.pdf).

- Animal welfare was cited as an issue of concern by a majority of respondents to a survey on restaurant social responsibility conducted in 2007. It was noted that animal welfare was the highest rated food-related issue, above locally-sourced foods and the offering of organic foods.  
—*Market Brief: Tracking and Interpreting Chain Restaurant Trends*, Technomic Inc., Jul 2007.  
[http://www.customerconnectireland.com/resources/amexMarketbrief\\_9-07%5B1%5D%20Copy.pdf](http://www.customerconnectireland.com/resources/amexMarketbrief_9-07%5B1%5D%20Copy.pdf).
- Ninety-five percent of respondents to a nationwide telephone survey conducted by Oklahoma State University agreed with the statement, “It is important to me that animals on farms are well cared for.”  
—Prickett RW et al, *Consumer Perceptions for Farm Animal Welfare: Results of a Nationwide Telephone Survey*, Oklahoma State University, Department of Agricultural Economics, 2007.  
<https://www.ingentaconnect.com/contentone/ufaw/aw/2010/00000019/00000003/art00015>.
- In a 2004 survey conducted by researchers at The Ohio State University, 92% of Ohioans agreed that it is important that farm animals are well-cared for, and 81% said the well-being of farm animals is just as important as the well-being of pets.  
—Rauch A & Sharp JS, *Ohioans Attitudes about Animal Welfare*, The Ohio State University, Social Responsibility Initiative, Jan 2005. <https://faunalytics.org/wp-content/uploads/2015/05/Citation472.pdf>.

### **Consumers support regulating farm animal care**

- According to a 2017 survey by Packaged Facts, nearly two-thirds of consumers agree that humane treatment of animals raised for food should be a societal concern and a regulatory issue.  
—*Survey: More Consumers Concerned About Animal Welfare*, Feedstuffs, Jun 2, 2017.  
<http://www.feedstuffs.com/news/survey-more-consumers-concerned-about-animal-welfare>.
- According to a 2014 survey for the Center for Food Integrity, 53% of consumers strongly agreed with the statement, “I would support a law in my state to ensure humane treatment of farm animals.” The Center indicated that strong agreement with this statement was at a 7-year high. The survey also reported that only 24% of respondents strongly agreed that meat in the U.S. is derived from humanely raised animals.  
—The Center for Food Integrity, *Cracking the Code on Food Issues: Insights from Moms, Millennials and Foodies*, 2014.  
<http://www.foodintegrity.org>.
- Research on mandatory labeling of animal welfare practices, conducted by university professors from Kansas State University and Michigan State University, found that 61.7% of survey respondents favored mandatory labeling of pork produced on farms using gestation crates, and 62.0% said they supported mandatory labeling of eggs produced using cages for laying hens. The researchers estimated that the typical U.S. shopper was willing to pay 20% higher prices for pork and egg products to obtain this type of mandatory labeling information.  
—Tonsor GT & Wolf CA, *Mandatory Labeling of Animal Welfare Attributes*, Kansas State University, Department of Agricultural Economics, Jul 2011.  
[http://www.agmanager.info/livestock/marketing/animalwelfare/AW-Labeling\\_FactSheet\\_07-19-11.pdf](http://www.agmanager.info/livestock/marketing/animalwelfare/AW-Labeling_FactSheet_07-19-11.pdf).

- In a survey conducted by agricultural economists at Oklahoma State University, approximately half of the respondents said they believe government should “force all food companies to indicate the level of animal care on their product labels.” More than half of the respondents said companies should be allowed to label their food “animal compassionate” if they adhere to high welfare standards. Also, of those with an opinion, 69% favored governmental bans on eggs produced under lower standards of animal care, even if they could easily find egg products that met their personal standards of care.

—Norwood FB & Lusk JL, *Compassion by the Pound: The Economics of Farm Animal Welfare*, Oxford University Press, 2011, pp. 341-343.
- The welfare and protection of animals raised for food was seen as very or somewhat important by 79% of respondents to a survey managed by the Humane Research Council in June 2008. A large majority (73%) would support a law requiring that farm animals, including pigs, cows and chickens, are provided with enough space to behave naturally.

—*Animal Tracker – Wave 1, An HRC-Managed Research Study*, Humane Research Council, Jun 2008. <https://faunalytics.org/>
- Fifty-eight percent of Americans said they were very or somewhat concerned about the treatment of farm animals in a 2003 poll by Zogby International. Enacting laws to protect farm animals from cruelty was supported by 82% of those surveyed.

—*Nationwide Views on the Treatment of Farm Animals*, Zogby International for the Animal Welfare Trust, 2003. <http://civileats.com/wp-content/uploads/2009/09/AWT-final-poll-report-10-22.pdf>.

### **“Humanely raised” is an important food claim**

- When 500 US consumers were asked to estimate the impact of the claim “humanely raised” on their intent to purchase a product, 34.5% of respondents said the claim would have a moderate impact, while 18.3% said it would have a high impact.

—*Food Label Claims that Make Consumers More Likely to Buy*, State of the Plate blog, May 22, 2018. <https://stateoftheplateblog.com/posts/2018/may/food-label-claims-that-make-consumers-more-likely-to-buy/>.
- In the 2018 Power of Meat survey, claims with the highest consumer awareness included natural, hormone-free, and antibiotic-free, followed by free range, humanely raised, and vegetarian fed. The report noted that sales of conventional meat products without any of these claims have “basically flatlined.”

—*Power of Meat, Part 3: Transparency, Health, Convenience are Key*, The Shelby Report, Mar 15, 2018. <http://www.theshelbyreport.com/2018/02/28/power-of-meat-2018-top-findings/>.
- Nearly three-quarters of consumers responding to a survey conducted by The Hartman Group said that when making purchasing decisions, it is important that the company treats animals humanely. Top animal welfare practices cited as being likely to increase product purchases included animals not mistreated while alive, animals raised in as natural an environment as possible, and animals not given antibiotics and hormones.

—*2017 Study Findings Consumer Familiarity with Sustainability Reached All-Time High*, Natural Products Insider, May 25, 2018. <https://www.naturalproductsinsider.com/business-resources/2017-study-finds-consumer-familiarity-sustainability-reached-all-time-high>.

- A University of Illinois study found that “humanely raised” ranked among the top three meat production attributes for consumers.

—*U of I Study Ranks Which Production Attributes are Most Important to Consumers When Buying Beef, Chicken* (news release), University of Illinois, College of Agricultural, Consumer and Environmental Sciences, Apr 19, 2017. [https://www.eurekalert.org/pub\\_releases/2017-04/uoic-uo041917.php](https://www.eurekalert.org/pub_releases/2017-04/uoic-uo041917.php).
- A survey of primary grocery shoppers of chicken across the U.S. found that over 33% of shoppers said that “humanely raised” on the label encourages their purchase when buying chicken. In addition, 42% of survey respondents said that “humanely raised” claims must be certified to trust them.

—*Gold’n Plump Launches New Attributes for all Natural Line and Tool to Help Define New Label Claims* (news release), GNP Company, Jul 12, 2016. <http://www.prnewswire.com/news-releases/goldn-plump-launches-new-attributes-for-all-natural-line-and-tool-to-help-define-new-label-claims-300296180.html>.
- Research by the Center for Food Integrity found that only 25% of consumers believe firmly that the meat, milk, and eggs that they buy come from animals who are humanely treated. Among the 2,001 consumers surveyed, 56% believe transparency with regard to treatment of animals builds trust. When asked where information on animal well-being should be made available, 39% said independent third-party websites, 35% said food company websites, 19% said on food product packaging, and the remainder said QR codes on packages. Food companies were most often seen as responsible for this information, followed by farmers, grocery stores, and restaurants.

—Johnston T, *Transparency, animal care crucial for consumer trust: CFI*, Meatingplace, Mar 25, 2016. <http://northernag.net/AGNews/AgNewsStories/TabId/657/ArtMID/2927/ArticleID/6298/Transparency-Animal-Care-Crucial-for-Consumer-Trust.aspx>.
- Packaged Facts online survey of 2,000 U.S. adults in April and May 2014 found that over 40% of respondents reported that they seek out meat from animals who were raised more humanely. A little over a third said they regularly buy natural and organic meat products.

—*57% of Consumers Buy Meat with Special Labels*, Science 2.0, Aug 3, 2015. [http://www.science20.com/news\\_articles/57\\_of\\_consumers\\_buy\\_meat\\_with\\_special\\_labels-156665](http://www.science20.com/news_articles/57_of_consumers_buy_meat_with_special_labels-156665).
- A public opinion survey conducted by Edge Research for the American Society for the Prevention of Cruelty to Animals (ASPCA) found that more than 80% of respondents felt it’s important that the chicken they eat is humanely raised. Yet less than a third of respondents trust the companies that make chicken products to treat their chickens in a humane manner. More than 75% of chicken consumers said they would like more humanely-raised chicken options at their local grocery stores.

—*Treat My Chicken Right: ASPCA Survey Shows Consumers Want More Humanely Raised Chicken, Feel it Leads to Safer Chicken Products* (press release), ASPCA, Sep 2, 2014. <http://www.aspc.org/about-us/press-releases/treat-my-chicken-right-aspca-survey-shows-consumers-want-more-humanely>.
- In a survey conducted for the Animal Welfare Institute, 86% of respondents said the government should require meat and poultry producers to prove claims like “humanely raised” and that the claims should not be allowed on product labels unless they have

been verified by an independent third party. Also, 86% of respondents to the survey agreed with the statement, “Producers should not be allowed to use the claim ‘humanely raised’ on their product labels unless they exceed minimum industry animal care standards.”

—Animal Welfare Institute, Oct 2013. (Available from AWI upon request.)

- The label claim “humanely raised” was ranked as the highest in importance over “organic,” “natural,” and “antibiotic free” among respondents to the 2013 Humane Heartland Farm Animal Welfare Survey conducted by American Humane. Ninety-five percent of the respondents indicated that a humanely raised certified label signified “better treatment of animals.”  
—*Humane Heartland Farm Animal Welfare Survey*, American Humane Association, 2013.  
<https://www.americanhumane.org/publication/humane-heartland-farm-animal-welfare-survey/>.
- In a survey of west coast consumers commissioned by the poultry company Foster Farms, 74% of respondents completely agreed that humane-certified foods should be more widely available for consumers.  
—*Foster Farms First Major Poultry Producer in the West to Earn Humane Certification from American Humane Association Meets Increasing Consumer Demand for Humanely Raised Foods* (press release), Foster Farms, Mar 11, 2013. <https://www.prnewswire.com/news-releases/foster-farms-first-major-poultry-producer-in-the-west-to-earn-humane-certification-from-american-humane-association--meets-increasing-consumer-demand-for-humanely-raised-foods-197011261.html>.
- An overwhelming majority (91%) of consumers of Just Bare chicken said third-party humane certification of animal products is extremely or very important in an October 2010 survey. When these consumers were asked about how much trust they place in various levels of animal welfare claims, nearly two-thirds (62%) said they placed a high degree of trust in certification by a third-party animal welfare organization. Far fewer consumers indicated trust in certification by a government or industry association or trust in a company’s own records.  
—*Common Questions*, Just Bare Chicken, Sep 12, 2012. <http://www.justbarechicken.com/faqs.cfm>.
- In a survey on the welfare of chickens raised for meat commissioned by the Animal Welfare Institute, 70% of all respondents, and 77% of frequent chicken meat shoppers, indicated they thought the claim “humanely raised” on a package of chicken meant that the animal was raised under a standard of care better than typical industry practice.  
—*U.S. Poll on the Welfare of Chickens Raised for Meat*, Animal Welfare Institute, Apr 2010.  
<http://awionline.org/sites/default/files/uploads/legacy-uploads/documents/FA-HumanelyRaisedCagedFreeSurvey-081110-1281725036-document-23248.pdf>.
- Fifty-one percent of consumers said the claim “humanely raised” was very important or important in causing them to believe a food is ethically produced. Of the 29 food claims studied, “humanely raised” ranked fourth highest, above “no antibiotics,” “produced in the USA,” “natural,” and “sustainably produced.”  
—*Ethical Food: A Research Report on the Ethical Claims that Matter Most to Food Shoppers and How Ethical Concerns Influence Food Purchases*, Context Marketing, Mar 2010.
- When asked to identify their top three reasons for purchasing “natural” or “organic” meat, 38% of respondents to an online poll conducted by the American Meat Institute

and the Food Marketing Institute chose “better health and treatment of the animal.” Animal treatment ranked third highest among nine meat selection criteria, above “freshness,” “better taste,” and “environmental impact.”

—Top 3 Reasons for Purchasing Natural or Organic Meat, *Beyond the Farm Gate*, Whole Foods Market, Issue 4, Jun 2010.

- In a national poll conducted by Harris Interactive for the World Society for the Protection of Animals, 58% of respondents indicated it is important to them to be able to purchase humanely labeled meat and eggs in their local supermarket, and approximately one-quarter of the sample said they had bought “organic” or “free range” animal products in the previous year.  
—*Finding Animal Friendly Food: The Availability of Humanely Labeled Foods in U.S. Grocery Stores*, World Society for the Protection of Animals, Boston, MA, 2009.
- In a survey conducted for the International Dairy-Deli-Bakery Association, 55% of American consumers who were aware of the “humane treatment” food claim felt that the claim was very or somewhat important. Of 19 claims studied, only two (“locally raised or grown” and “antioxidants”) were seen by aware shoppers as being more important than “humane treatment certified.”  
—*Health & Wellness: The Purpose-Driven Consumer* (Executive Summary), International Dairy-Deli-Bakery Association.
- Consumers responding to a 2007 Public Opinion Strategies survey ranked the “humanely raised” label as the most important food label, over “organic” and “natural.”  
—*Frequently Asked Questions*, The Humane Touch, American Humane Association.  
<http://humaneheartland.org/faqs>.
- Of more than 1,000 respondents to a 2007 Oklahoma State University survey, 52% said personal food choices have a large impact on the well-being of farm animals, and 49% said they consider the well-being of farm animals when they make food purchasing decisions.  
—Prickett RW et al, *Consumer Perceptions for Farm Animal Welfare: Results of a Nationwide Telephone Survey*, Oklahoma State University, Department of Agricultural Economics, 2007.  
<https://www.ingentaconnect.com/contentone/ufaw/aw/2010/00000019/00000003/art00015>.
- In a 2005 survey of Michigan residents conducted by researchers at Michigan State University, 92% of respondents rated “humane animal treatment” as “very important” or “somewhat important” as a factor when purchasing animal products. Humane treatment was rated as significantly more important than factors having to do with where the animal was raised or by whom.  
—Conner DS et al, *Consumer Preferences for Pasture-Raised Animal Products: Results from Michigan*, *Journal of Food Distribution Research*, Jul 2008, pp. 12-25.
- When University of California, Santa Cruz, researchers asked central California shoppers to evaluate five potential food label claims, “humane” was most often the top-ranked choice, above “locally grown,” “living wage,” “U.S. grown,” and “small-scale farm.” Product labels were a preferred source of food information for 81% of the consumers.  
—*What Do People Want to Know About Their Food?*, University of California, Santa Cruz, Research Brief #5, Winter 2005.



## **Consumers are willing to pay more for food that is “humanely raised”**

- In a survey conducted for Mercy for Animals by NRG Research Group, 78% of consumers supported improving the lives of chickens even if it increases the cost of meat.  
—*Broiler Chicken Welfare Survey*, NRG Research Group, Jul 5, 2017. <http://www.prnewswire.com/news-releases/four-out-of-five-americans-want-restaurants-and-grocers-to-end-cruel-factory-farming-practices-300487484.html>.
- Two-thirds of respondents to a survey conducted for Kettle & Fire said they would be willing to spend anywhere from 5 to 20 percent more for humanely raised food.  
—*From Farm Animal to Food: 2,000 People Share Their Feelings about How Their Food is Raised*, Kettle & Fire, 2016. <https://www.kettleandfire.com/pages/how-your-food-is-raised>.
- Two-thirds of respondents to a survey conducted for the ASPCA said they would purchase welfare certified animal food products even when it means a modest increase in price. The majority of consumers would use welfare-certified animal products as a criterion for choosing a restaurant, and a plurality would be willing to pay up to \$5.00 more per meal.  
—*New Research Finds Vast Majority of Americans Concerned about Farm Animal Welfare* (news release), ASPCA, Jul 7, 2016.  
<http://www.asPCA.org/about-us/press-releases/new-research-finds-vast-majority-americans-concerned-about-farm-animal>.
- In the 2014 Humane Heartland national survey, participants identified lack of availability as the biggest factor keeping them from buying humanely raised products. Less than one out of five participants identified cost as the biggest factor.  
—*2014 Humane Heartland Farm Animal Welfare Survey*, American Humane Association, Nov 2014.  
<https://www.americanhumane.org/app/uploads/2016/08/2014-humane-heartland-farm-survey.pdf>.
- When asked, “what is the most you are willing to pay for high quality, humanely raised products,” 34% of respondents to a 2013 survey conducted by American Humane said 10-20% more, while 28% of respondents said they would pay 20-30% more.  
—*Humane Heartland Farm Animal Welfare Survey*, American Humane Association, 2013.  
<https://www.americanhumane.org/publication/humane-heartland-farm-animal-welfare-survey/>.
- In a survey of poultry consumers conducted by Technomic, 38% indicated they are more likely to purchase and be willing to pay more for “humane” meats. Thirty-seven percent were more likely to purchase and pay more “organic” meats.  
—*Custom Poultry Consumer Survey*, Technomic, Sep 2012.
- One in four (24%) of respondents to a consumer survey commissioned by Whole Foods Market said they are willing to pay more for meats from animals raised under humane animal husbandry standards.  
—*Americans Willing to Pay More for Food Without Artificial Ingredients, Meats Without Antibiotics/Added Growth Hormones* (press release), Whole Foods Market, Sep 27, 2012.  
<http://media.wholefoodsmarket.com/>.

- Fifty-seven percent of consumers responding to a Context Marketing survey said they would be willing to pay 1% to 10% more “for food that promises to be produced to higher ethical standards.” Twelve percent were willing to pay 10% more.  
—*Ethical Food: A Research Report on the Ethical Claims that Matter Most to Food Shoppers and How Ethical Concerns Influence Food Purchases*, Context Marketing, Mar 2010.
- A 2007 survey by Public Opinion Strategies found that 58% of consumers would spend an additional 10% or more for meat, poultry, eggs, or dairy products labeled as “humanely raised.”  
—*Frequently Asked Questions*, The Humane Touch, American Humane Association.  
<http://humaneheartland.org/faqs>.
- In a survey by The Ohio State University, 59% of Ohioans said they would be willing to pay more for meat, poultry, or dairy labeled as coming from humanely treated animals. Among those, 43% said they would pay 10% more, and 12% said they would pay 25% more.  
—Rauch A & Sharp JS, *Ohioans Attitudes about Animal Welfare*, The Ohio State University, Social Responsibility Initiative, Jan 2005. <https://faunalytics.org/wp-content/uploads/2015/05/Citation472.pdf>.
- Consumer surveys by the Animal Agriculture Alliance in 1993, 1998, and 2004 demonstrated that American shoppers are willing to pay more for food labeled “humanely raised.” In 2004, 31% of respondents were willing to pay 5% more, while 23% were willing to pay 10% more.  
—*Consumer Attitudes about Animal Welfare: 2004 National Public Opinion Survey*, Animal Agriculture Alliance and National Corn Growers Association, Apr 2004.  
[http://www.animalagalliance.org/images/ag\\_insert/2004\\_Pub\\_Op\\_PR.ppt](http://www.animalagalliance.org/images/ag_insert/2004_Pub_Op_PR.ppt).
- Eighty-one percent of U.S. respondents to a Zogby International poll would be willing to pay more for eggs from chickens raised in a humane manner.  
—*U.S. Public Supports Humane Treatment for Hens*, Zogby International for Farm Sanctuary, Sep 2000.  
<http://www.isecruelty.com/poll.php>.
- Forty-four percent of a sample of 1,000 Americans, surveyed in 1998, said they would try a “humanely raised” product if the cost was 5% more, while 20% would try the product if it was 10% more.  
—*American Attitudes towards Farmers and Farm Animal Issues*, Opinion Dynamics for the Animal Industry Foundation, Arlington, VA, 1998.

### **Certain food labels confuse and mislead shoppers**

- While shoppers say they are paying more attention to labels and product claims, they also say they are overwhelmed and confused by what the claims mean, according to a survey by Acosta, a sales and marketing firm in the consumer packaged goods industry.  
—*Millennials Drive Rise in Fresh-Meat Buying: Study*, Meatingplace.com, May 21, 2018.  
<http://www.micausa.org/millennials-drive-rise-fresh-meat-buying-study/>.
- In a survey conducted by the business school at Arizona State University, consumers were willing to pay \$1.26 per pound more for steak labeled “natural” if they were unaware of the definition of the claim. Consumers provided with the USDA definition of

natural were unwilling to pay a premium for the natural label alone, but were willing to pay more for the claim when it appeared together with “grass fed” or “no growth hormones.”

—*Consumers Will Pay More for Products with Positively Perceived Labels*, Farm Futures, Dec. 7, 2017.

<http://www.farmfutures.com/farm-life/consumers-will-pay-more-products-positively-perceived-labels>

- A survey conducted for the National Chicken Council found that 78% of consumers are concerned about confusing or misleading label claims on packages of chicken meat. Large majorities of respondents incorrectly answered questions about the raising of chickens for meat. For example, approximately three-fourths of consumers said added hormones and antibiotics are present in most chicken meat, and 71% said most chickens raised for meat are raised in cages.

—*US Chicken Consumption*, Presentation to Chicken Marketing Summit, National Chicken Council, Jul 18, 2017.

- Consumers responding to a University of Illinois survey ranked “no growth hormones” as the most important meat production attribute, despite the fact that growth hormones are already prohibited for poultry and pork products.

—*U of I Study Ranks Which Production Attributes are Most Important to Consumers When Buying Beef, Chicken* (news release), University of Illinois, College of Agricultural, Consumer and Environmental Sciences, Apr 19, 2017. [https://www.eurekalert.org/pub\\_releases/2017-04/uoic-uoio41917.php](https://www.eurekalert.org/pub_releases/2017-04/uoic-uoio41917.php).

- In a national survey conducted by the National Chicken Council, 60% of U.S. consumers said they find chicken labels confusing (perhaps because the industry uses misleading and meaningless claims, such as “cage free” and “no added hormones”).

—*Over 60 Per Cent of Consumers Find Chicken Labels Confusing*, The Poultry Site, Mar 16, 2016.

- In a survey conducted by the Opinion Research Corporation for Consumer Reports, 50% of consumer said they thought the natural label meant that the animal went outdoors, while 69% said they thought the label should mean that animals went outdoors. Results were similar for the organic label (54% said that organic meant animals went outdoors, and 68% said the claim should mean that animals went outdoors.)

—*Natural Food Labels Survey*, Consumer Reports National Research Center, Jan 2016.

[http://www.consumerreports.org/content/dam/cro/magazine-articles/2016/March/Consumer\\_Reports\\_Natural\\_Food\\_Labels\\_Survey\\_2015.pdf](http://www.consumerreports.org/content/dam/cro/magazine-articles/2016/March/Consumer_Reports_Natural_Food_Labels_Survey_2015.pdf).

- A survey commissioned by the National Chicken Council reveals extreme consumer confusion related to the meaning of common labeling claims on poultry. For example, 77% of respondents said they believe chicken meat contains added hormones and steroids, and 68% said they believe most chickens raised for meat are confined to cages.

—*Nationwide Survey Reveals Nearly 80 Percent of Americans Mistakenly Believe that Chicken Contains Added Hormones or Steroids*, National Chicken Council (press release), Dec 1, 2015.

<http://www.nationalchickencouncil.org/nationwide-survey-reveals-nearly-80-percent-americans-mistakenly-belive-chicken-contains-added-hormones-steroids/>.

- The Organic and Natural Health Association reports that 36% of consumers do not believe there is a difference between natural and organic foods, according to a survey conducted by Natural Marketing Institute in January 2015. The survey also revealed that

46% of consumers believe the U.S. government regulates foods labeled as “natural” and only 61% believe the government regulates food labeled as “organic.”

—Crane M, *What’s the Difference between Natural and Organic Foods? Don’t Ask Consumers*, Nutritional Outlook, Nov 6, 2015.

- Respondents to a survey conducted by the Natural Marketing Institute found that about 33% of US consumers do not make a quality distinction between the terms “natural” and “organic.” Approximately half of respondents said they believe “natural” means the product is free of synthetic pesticides and does not contain genetically modified organisms (GMOs).

—*Trade Group’s Definition of “Natural” to Exceed Organic Standards*, Sustainable Food News, Oct 6, 2015. [https://www.sustainablefoodnews.com/story.php?news\\_id=23540](https://www.sustainablefoodnews.com/story.php?news_id=23540).

- In surveying frequent consumers of fresh chicken products regarding packaging label claims, Russell Research found that the claims most often looked for and most trusted by shoppers were “natural” and “no added hormones or steroids.” (These are arguably the most misleading and meaningless of all claims that appear on chicken product labels.) In addition, more than three-quarters of shoppers said they would be more likely to purchase a product with third-party verification of label claims.

—*Fresh Chicken Study: Final Report*, Russell Research, Oct 2015.

- According to a survey commissioned by egg producer Vital Farms, fewer than half of consumers are familiar with the term “pasture raised,” and the majority thought that “cage free” and “free range” mean the birds have been raised outdoors. (While the USDA’s definition of free range is that the birds have access to the outdoors, cage free merely means that birds are not regularly confined to a cage.)

—Black J, *Scratching out a Market Eager for ‘Pasture-Raised’ Eggs*, The Washington Post, Apr 8, 2015, E2.

- When a sample of health-conscious lowans was asked about food labels, their support for labels such as “hormone-free” and “antibiotic-free” declined significantly after being provided facts about how the government defines and enforces the claim.

—*Food Labels Helpful but Their Claims Raise Skepticism, Food & Family Project Survey Finds*, Food & Family Project, Jan 21, 2015.

- A large majority of respondents to a survey conducted by *Consumer Reports* incorrectly identified the meaning of the claim “natural” when used on meat and poultry products: 89% believed the claim indicated the animals did not receive growth hormones; 81% said no antibiotics or other drugs; and 85% said the animals’ feed did not contain genetically engineered organisms. (None of these criteria are present in USDA’s current definition of the claim.)

—Bopp S, *It’s Only Natural, But What Does That Mean?*, Drovers CattleNetwork, Aug 27, 2014.

- In a survey commissioned by *Consumer Reports*, a large majority of respondents exhibited false expectations of the claim “humanely raised.” For example: 92% of consumers said the claim should mean the farm was inspected to verify the claim; 90% said the term should mean the animals had adequate living space; 88% said the term should mean animals were humanely slaughtered; and 79% said the claim should mean the animals went outdoors—none of which are necessarily true, as USDA has no

definition for the claim and allows producers to determine what the claim means to them.

—*Survey Reveals Consumers Have Different Expectations for ‘Natural’ Food Products*, MeatPoultry.com, Jun 16, 2014.

[http://www.meatpoultry.com/articles/news\\_home/Trends/2014/06/Consumer\\_Reports\\_aims\\_to\\_ban\\_n.aspx?ID=%7BC49A9FD4-0039-4C4A-B9F3-F45492ECE987%7D](http://www.meatpoultry.com/articles/news_home/Trends/2014/06/Consumer_Reports_aims_to_ban_n.aspx?ID=%7BC49A9FD4-0039-4C4A-B9F3-F45492ECE987%7D).

- In a survey commissioned by CommonGround, more than half of moms agreed it is important to feed their families “hormone-free” poultry and pork even though it may cost more to do so. (But in fact, USDA prohibits the use of hormones to raise chickens and pigs, and consequently there is no value to paying more for “hormone-free” labeled pork or chicken products.)

—*Know Before You Buy: 5 Things Moms Get Wrong at the Grocery Stores*, CommonGround.

<http://www.findourcommonground.com>.

- More than half (53%) of moms surveyed by CommonGround agreed it is important to purchase food labeled “all natural,” whenever possible because it is a more nutritious choice for their family. (However, the natural label does not include any standards regarding farm practices or the nutritional content of food.)

—*Know Before You Buy: 5 Things Moms Get Wrong at the Grocery Stores*, CommonGround.

<http://www.findourcommonground.com>.

- Only two percent of more than 2,000 Americans responding to a Harris Interactive Poll conducted for the Animal Welfare Institute were able to correctly identify the definition of “natural” when used on meat and poultry. Fifty-one percent mistakenly thought “natural” meant the product came from animals who were not administered hormones or antibiotics. (The “natural” claim indicates a product is minimally processed and has no artificial ingredients; the claim has no relevance to how the animals were raised or treated.) Seventy-one percent of the sample strongly or somewhat agreed that having both a “natural” and a “naturally-raised” label, where the labels have different meanings, could be confusing to consumers.

—*Natural Labeling Poll*, Harris Interactive QuickQuery for the Animal Welfare Institute, Oct 2009.

- When Consumer Reports asked what consumers thought a “naturally raised” label on a meat product should mean, 85% said that the product came from an animal raised in a natural environment, 77% said it came from an animal that had access to the outdoors, and 76% said the label meant the animal had been treated humanely. (“Naturally raised” actually means the animal was not given antibiotics or hormones and was fed a vegetarian diet. The claim does not describe the housing or treatment of animals.)

—*Food-Labeling Poll 2008*, Consumer Reports, Nov 2008.

- Eighty-three percent of respondents to a 2007 food labeling poll by Consumer Reports said that the “natural” label on meat should mean “it came from an animal that was raised in a natural environment.”

—*Food Labeling Poll*, Consumer Reports, Jul 2007.

- In a 2007 national telephone survey conducted by Zogby International, 73% of respondents indicated that they felt it is inappropriate for meat, milk, and eggs from

animals who are kept indoors, crowded in cages, and standing on metal and concrete floors, to be labeled as “natural.” When asked where “natural” meat, dairy, and eggs come from, 48% said from animals raised with free access to the outdoors, while 29% said from animals confined indoors, and 23% of respondents said they were unsure.

—*USDA Natural Label Called Meaningless and Misleading to Consumers* (press release), PR Newswire, Jan 11, 2007.

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