

To: Interested Parties
Cc: American Society for the Prevention of Cruelty to Animals
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In May, 2013, Lake Research Partners designed and fielded an online survey of 1,000 American adult consumers of chicken about their purchasing habits and their views and understanding of the chicken-raising industry.¹ The survey revealed that food safety and health were top concerns among consumers. However, the respondents did not associate chicken with food safety concerns until they were provided with additional information about the conditions under which most chickens are raised. The survey also revealed that there were widespread misconceptions regarding the ways in which chickens are conventionally raised for food, including how they are treated and about the sanitation conditions of the farms on which they are raised. Once consumers learned more about these conditions, concern about chicken welfare increased dramatically, as did consumers' desire to purchase humanely raised chickens (including purchasing chicken at a higher price).

Initial Findings

The survey established a baseline to understand what was important to consumers and what consumers already knew and believed. To establish this baseline, the survey asked basic questions before consumers were given additional information about how the farming industry raises chickens. The answers revealed the following baseline results:

- **An overwhelming majority of American consumers were concerned about the welfare of animals raised for food.** More than three-fourths of consumers (77%) said that they were concerned about the welfare of animals that are raised to produce human food.
- **Consumers believed they were making an overall good and healthy decision to purchase and eat chicken.** Almost all consumers (90%) believed that chicken is healthy for those consuming it. With the exception of fish (92%), consumers believed that chicken was the healthiest animal product tested (among fish, beef, lamb, pork, and duck).
- **Consumers were the most focused on food safety and their own health when they made decisions about the chicken they purchased.** Topping the list of considerations were whether the chicken is safe to eat (86% very important), whether the chicken is healthy to eat (82%), whether the chicken is a healthy animal (78%), and the sanitation of chicken farms (74%). These were rated as more important than price (72%) and nutritional content (69%), two other factors that were top concerns for consumers as well.
- **While not as highly rated as food safety and health, chicken welfare factors were also very important to consumers.** Fifty-six percent of consumers said that whether the chicken was raised humanely was a very important factor to them, and 48% said that whether the chicken suffered was very important. One reason chicken welfare fell

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somewhat behind was because many consumers initially did not connect the welfare of chickens to food safety or human health.

- **Consumers lacked information about how chickens are raised.** A majority of consumers who do not primarily purchase chicken represented as humanely raised said they do not buy or order this chicken because they do not know whether the chicken they buy is in fact raised humanely (53%). Less important was cost, with only 34% saying that they did not purchase humanely raised chicken because it is too expensive.
- **Consumers thought that most of the chicken they purchased was safe and was raised in sanitary conditions.** Eighty-eight percent of consumers were confident that most of the chicken they purchased or ordered was safe to eat. Related to food safety, 66% believed that most of the chicken they purchased or ordered came from chicken farms that have sanitary conditions.

Post-Information Findings

After consumers were given information about the actual conditions in which chickens are raised, their views regarding health, food safety, and animal welfare – as well as how the chicken industry operates – changed dramatically.

Consumer Feelings Post-Information

- **After hearing more information on the chicken farming industry, consumers were split on whether chicken is safe to eat. This was a significant change from their original thinking.** Initially, 88% of consumers were confident, compared to only 10% who were not confident, that the chicken they buy is safe to eat. However, after consumers received information about the conditions in which chickens are raised, 50% were confident and 46% were not confident.

Consumers **lost confidence in whether the chicken they purchased or ordered came from chicken farms that have sanitary conditions** (66% initially; 39% confident at the end of the survey).

- Consumers also lost confidence in **whether the chicken they purchased or ordered was raised humanely** (60% confident initially; 35% confident at the end of the survey).
- **Consumers would prefer to purchase humanely raised chicken.** Nearly three in five consumers (59%) said that if it were completely up to them, they would prefer to primarily buy or order humanely raised chicken.

What Consumers Were Willing To Do

- **Learning about the conditions in which chickens are raised had a dramatic effect on the decisions consumers wanted to make,** as just one in eight (13%) said it would have no or

little impact on them. A strong plurality said that they would seek out chicken raised more humanely (46%), and more than a quarter (28%) said they would reduce their chicken consumption.

- **Given information about the conditions in which chickens are raised, there is strong potential for consumers to change their habits when it comes to purchasing and consuming chicken.** After they were given information about the conditions in which chickens are raised, 86% of consumers said that they were more likely to buy chicken products from animals that are raised more humanely and are healthy. Additionally, there was a substantial gap when it came to humanely raised chicken. While only 15% of consumers reported they currently purchase humanely raised chicken, as noted above, a majority could change their habits, with 59% indicating they would prefer to buy or order humanely raised chicken.
- **Consumers were willing to pay more for humanely raised chickens.** Overwhelmingly, consumers said that they would be more likely to purchase a chicken that is raised more humanely and is healthier (86% more likely). Among those who would be more likely to purchase healthier chicken which has been raised more humanely, 82% would be willing to buy this better type of chicken even if it were more expensive than what they pay for “regular” chicken.

A total of 70% of chicken consumers were likely to spend more money than they do now to buy humanely raised chicken. More than three in five said that they would be willing to spend at least 6% more for humanely raised chicken, four in nine would be willing to spend at least 11% more, and one in five would be open to paying at least 21% more.

- **Consumers were divided when it came to deciding whether they would rather spend more money for chicken that was raised more humanely and is healthier for them or spend the same amount as they do now, but for a smaller portion.** Forty-four percent of consumers said they would rather spend more money for a chicken that was raised more humanely; 40% would rather spend the same amount for a smaller portion. With regard to chicken that is healthier, 44% percent of consumers said they would rather spend more money for a chicken that is healthier for them; 44% would rather spend the same amount, but for a smaller portion.
- **After learning how chickens are raised on conventional farms, consumers saw this as a systemic issue that might be difficult to overcome.** They also considered it a food safety issue, and a plurality (38%) said that stricter government regulation of the chicken industry would be the best solution to the issue.

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In summary, consumers cared about the welfare of chickens raised for food, and once they were informed of the conditions in which most of these chickens were raised, their concern

significantly increased. Consumers would prefer to purchase humanely raised chicken, and they would even be willing to pay more for it. Additionally, health and food safety were very important to consumers, and the link between humanely raised chickens and healthy chickens contributed to their concern regarding the welfare of the chickens and the environment in which they are raised.

ⁱ Lake Research Partners designed this online survey of 1,000 American adult chicken consumers. The survey was conducted over the internet from a national sample of internet users. The nationwide survey was conducted May 21-24, 2013. The margin of error for the total sample is +/- 3.1 and larger for the subgroups.