

# Getting to the Meat of the Matter: Social & Economic Issues in Animal Welfare in Australia's Livestock Industries

ARC Linkage Project - LP130100419 (2014-16)

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# ARC Linkage Project

## LP130100419

- Chief Investigators, University of Adelaide:
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  - Dr Heather Bray (Research Fellow)
- Partner Investigators
  - Coles Supermarkets (cash)
  - Elders Ltd. (cash)
  - Richard Gunner's Fine Meats (in kind)
  - DAFF (in kind)
  - SARDI (in kind)

# Background

- Documented that Australian consumers are becoming increasingly concerned about animal welfare
- Hence meat and livestock producers are growing anxious about consumer perceptions and potential impacts on the industry of negative consumer reactions
- Crucial to develop an in-depth understanding of both the **social and economic impacts of consumer views** on animal welfare in Australia's livestock industries

# Project Aims

- **Whole-of-chain approach** to understanding animal welfare along the animal production value chain in Australia
- Determine how these perceptions influence consumer and industry behaviours
- Provide insight on how to foster better alignment between industry practices and consumer demands

# Specific Objectives

1. Assess Australian consumer awareness, knowledge, and understandings of animal welfare in the livestock industries
2. Analyse the drivers of consumer perceptions (underlying concepts and values)
3. Determine the effects that consumer perceptions have on domestic purchasing behaviours (including willingness to pay)
4. Explore Australian livestock producer, processor, and retailer perceptions of animal welfare and drivers of potential changes in future practices
5. Examine ways in which producers, processors, retailers, and consumers can best communicate their values and concerns regarding animal welfare to each other, and better align them
6. Establish best-practice standards with regard to industry communication to consumers about animal welfare

# Methods: Qualitative Research

- Used in order to articulate not only perceptions but underlying concepts and values
- Utilizes focus groups and other qualitative methods
- Key goal is dialogue (not education): hence essential not to adopt or reinforce 'deficit model' of consumer understandings

# Example: ARC DP Food Ethics

- Uses focus groups to explore consumer understandings of ‘food ethics’
- Revealed that categories (such as organic) are defined in various ways, if values are taken as key drivers of purchasing patterns
- So although ‘organic’ has a scientific definition, some consumers associate it primarily with nutrition, some with purity/natural products, some with sustainability, and some with elitism
- Hence critical not just to ask what they think, but **why** they think that (associated values)

# Methods: Discrete Choice Experiments

- DCEs allow researchers to efficiently:
  - Estimate relative values for multiple product attributes
  - Predict consumers' actual market behaviours when different types of information are presented
- Choice sets are framed to resemble actual food purchasing scenarios
- Respondents make trade-offs amongst attributes using online and point-of-sale experiments



# Wine DCE Example

Showing image 1 of 16.

Imagine you are shopping for an alcoholic beverage (bag in box) to have for your daily consumption, e.g. for dinner during the week.



From these four alternatives, which one would you be most likely to choose?

Would you realistically buy your most preferred option?

Yes

No

# Example from Previous Consumer Meat Research

- Simulated shelves with visual packaging presentations

## Example:

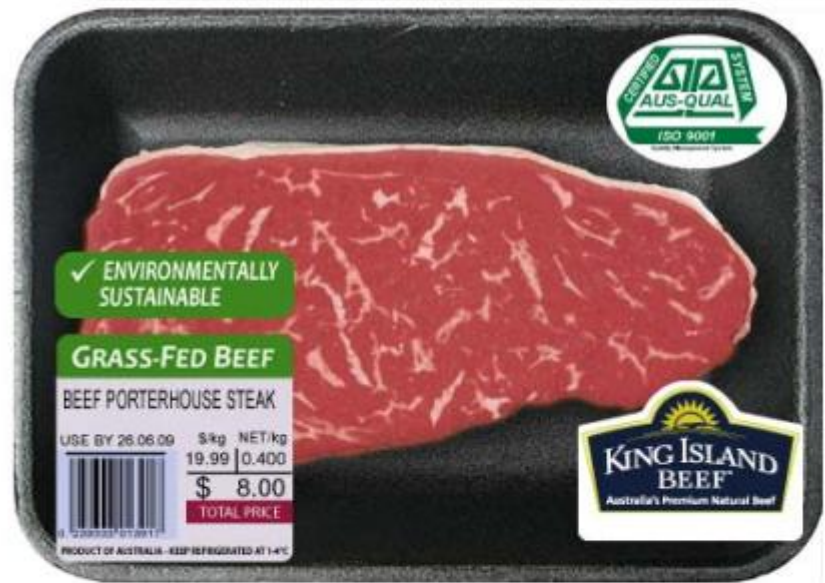
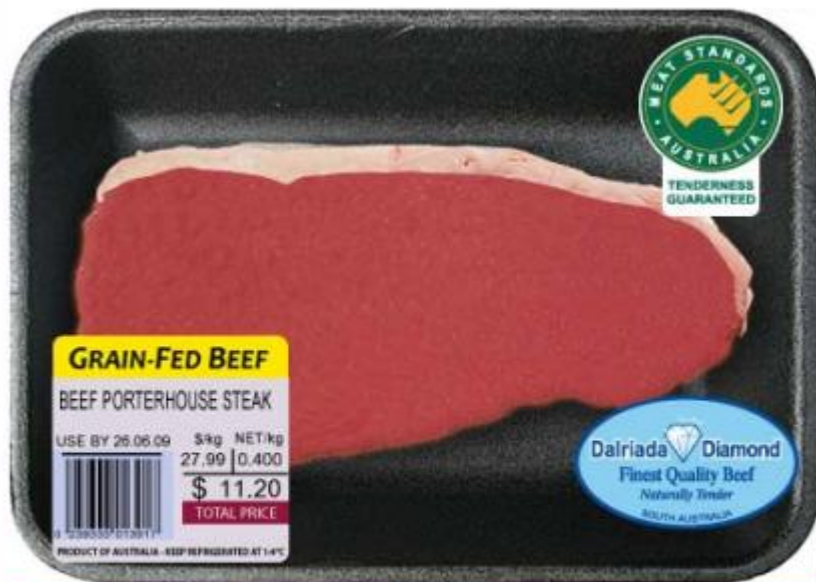
*“Imagine you are shopping for a Sirloin/Porterhouse beef steak at your favourite retail outlet for consumption at home (e.g. Dinner with family)...*

*In the following 16 screens you will be shown shelves with four different steak options.*

*Select the beef steak that you would be most likely to choose.”*

# Steak attributes analysed (Previous Study)





Would you realistically purchase the option you chose?

Please select one

Yes

No

# Research for Translation: Policy and Industry Decisions

- Research approach allows for **translation of research**
  - Examines how economic decisions of individuals, firms, and institutions are influenced by a mix of social, emotional, and cognitive factors
  - Determines if there is a market failure and what type of intervention or programs would be most efficient
  - Establishes how behaviour can be influenced in the most efficient way
  - Tests the relative impact of animal welfare-related information or “messages” on actual consumer behaviour
  - Establishes the most efficient way to design animal welfare related food policy programs and dialogues

# Questions?

## Interested in becoming involved?

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