

Consumers' View of Pork Production

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■ Purpose

The purpose of the presentation is to provide insights into how non-farming Canadians view pork production, and how those views have shifted over time. The presentation is based on survey-based market research conducted by Ipsos-Reid on behalf of Canadian hog producer organizations in 1999, 2002 and 2004.

■ Background and Objectives

The hog industry has, for the past several years, been confronted with several issues with respect to public impressions of the industry. Local resistance to industry expansion and concerns about food safety in the wake of BSE in the beef industry have been the most prominent in recent years.

In 1999, 2002 and 2004, market research was conducted with members of the public in order to:

- Track in an accurate and reliable manner the attitudes of Canadians toward Canadian pork production; and,
- To provide information that can be used in the development of actions at a national and provincial level to address the issues confronting the pork industry.

Objectives of the research were to:

- Measure the awareness of hog farm practices among non-farming Canadian consumers;
- Identify pork industry issues, and determine which issues are most important to Canadian consumers.

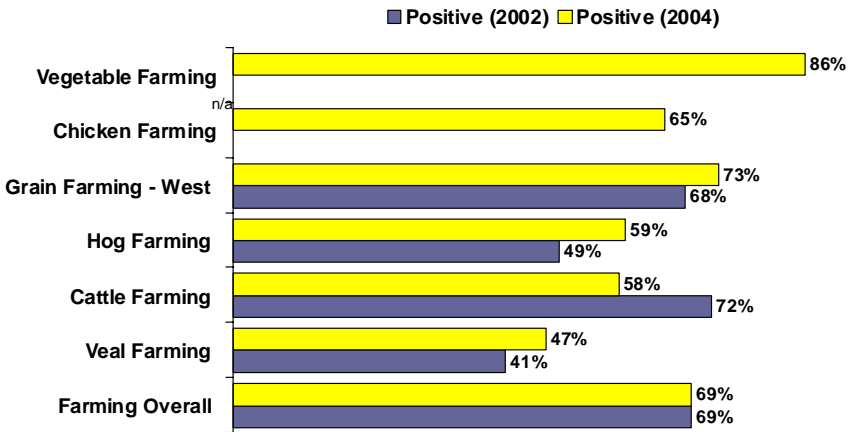
- Identify the key sources of information for consumers about pork production, and determine their credibility.

■ Overall Impressions of Canadian Agriculture and Hog Farming

In all study waves (1999, 2002, 2004), just over two-thirds of Canadians have expressed a positive impression of Canadian farming. Compared with Canadian agriculture overall, hog farming is less positively perceived. However, attitudes have significantly improved between 2002, when 49% of consumers had a positive overall impression, and 2004, when 59% said their impression of hog farming was either “very” or “somewhat” positive (**Figure 1**).

Figure 1. Overall Impressions of Canadian Agriculture

Q1/Q2. What would you say is your overall impression of _____ today?



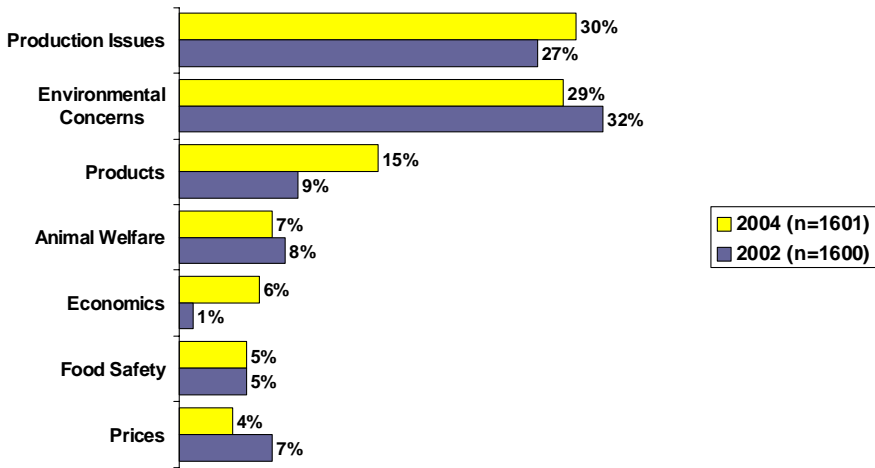
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Top2Box – “Very” or “Somewhat” Positive
 National Attitudes Toward Pork Production – Ipsos-Reid 2002, 2004

■ Perceptions of the Most Important Issues in Hog Farming

Figure 2. Top-of-Mind Issues Related to Hog Farming

Q3. When thinking about hog farming, what thoughts or topics come to mind? (Total Mentions)



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National Attitudes Toward Pork Production – Ipsos-Reid 2002, 2004

When non-farming Canadians are asked about top-of-mind issues, negative perceptions of environmental and production issues dominate (**Figure 2**). Environmental issues specifically mentioned by consumers include waste/manure management, air pollution/odour and water issues. Production issues are mostly related to negative perceptions of large-scale production.

When exposed to a list of possible issues, “ensuring the safety of Canadian pork products” has consistently been the most important issue for consumers (**Figure 3**).

However, “reducing the environmental impact of hog farming” has risen from fourth in importance in 1999 to second in importance in both 2002 and 2004. Environmental impact was the only issue among those tested to post a significant increase in 2004 compared with 2002.

There was no difference in the importance of reducing environmental impact among urban vs rural dwellers.

Figure 3. Importance of Hog Farming Topics

Q10. Thinking about Canada’s hog farming industry, which of the following hog farming topics is most important to you, personally?

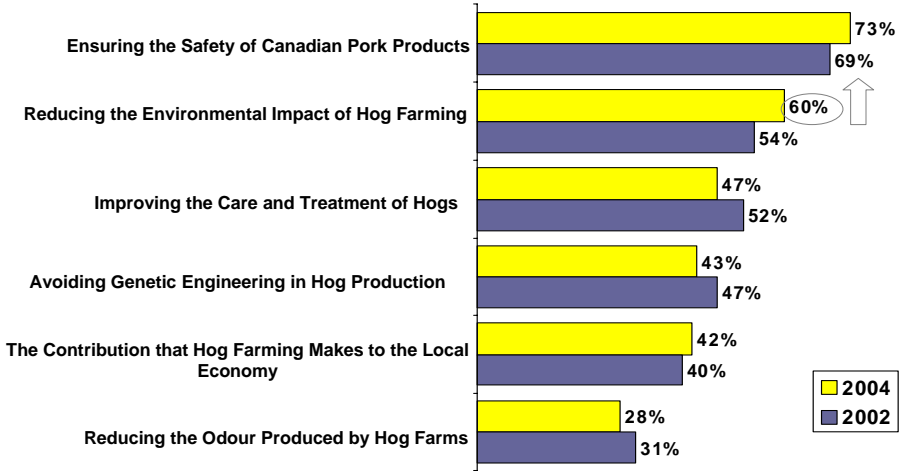
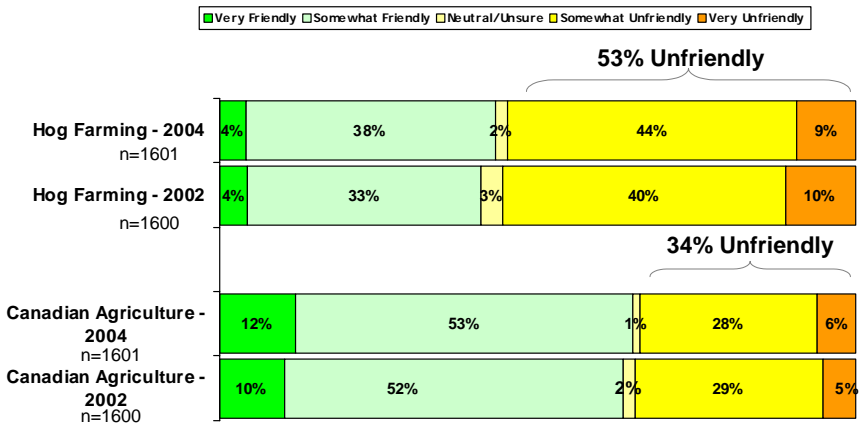


Figure 4. Degree to Which Farming / Hog Farming is Environmentally Friendly

Q11. Would you say that Canadian agriculture is...to the environment
Q12. Would you say that Canadian hog farming is...to the environment



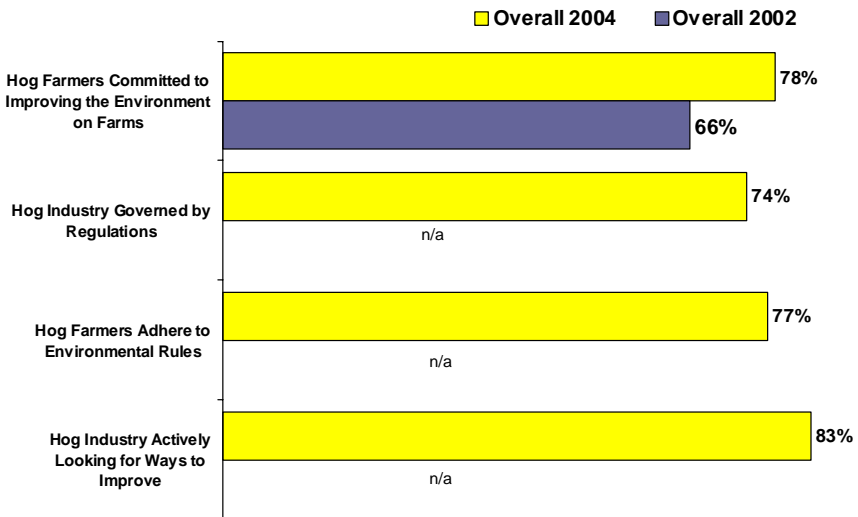
■ Perceptions of the Environmental Impact of Hog Farming

While almost 2/3 of consumers view agriculture overall as being “very friendly” or “somewhat friendly” to the environment, they view hog farming as less so – only 42% believe hog farming is friendly to the environment (Figure 4).

Generally speaking, however, a large majority of consumers (74% or more) believe that the hog industry, and hog farmers, are well-regulated, compliant and committed to improving the environment (Figure 5).

Figure 5. Beliefs Related to Regulations and Compliance

Q13. Based on what you might have seen, read or heard, I'd like you to tell me whether you agree or disagree with the statement.



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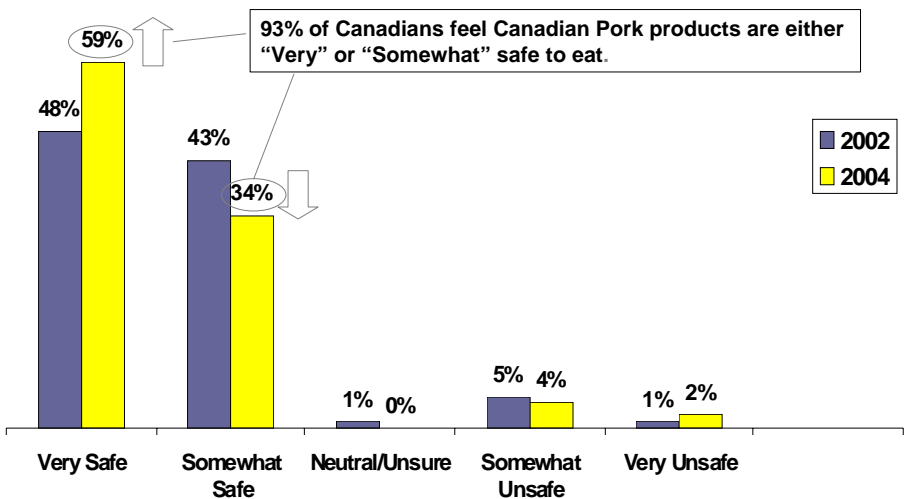
Top2Box – “Strongly” or “Somewhat” Agree
 National Attitudes Toward Pork Production – Ipsos-Reid 2002, 2004

■ Perceptions of the Safety of Canadian Pork

Pork enjoys a very positive reputation for safety among Canadian consumers – 9 in 20 Canadians say that pork products are “very” or “somewhat” safe to eat (**Figure 6**). Already high, perceptions of safety have actually strengthened between 2002 and 2004 – an average of 59% of consumers rate pork as “very” safe to eat, vs 48% in 2002. Pork is perceived to be as safe as chicken and beef – over 90% of Canadian consumers rate all three meat types as safe.

Figure 6. Perceptions of Pork Safety

Q21. Would you say Canadian Pork Products are _____ to eat?



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National Attitudes Toward Pork Production – Ipsos-Reid 2002, 2004

■ Perceptions of the Care and Treatment of Hogs

A majority of consumers (69%) feel that hogs on Canadian hog farms are “very” or “somewhat” well treated. However, two-thirds feel that profit is more important to farmers than animal welfare. 73% of consumers feel that small farms treat animals more humanely than large farms.

■ Industry Understanding and Information Sources

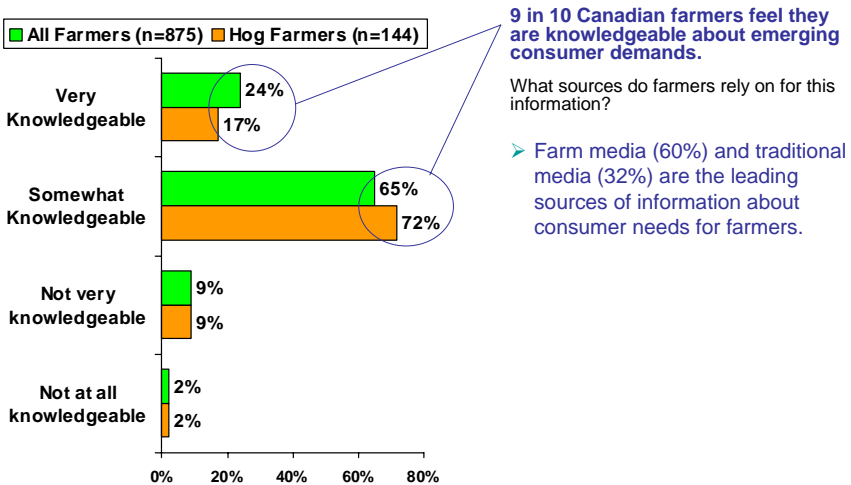
Knowledge of hog farming practices is low and has eroded since 2002. Approximately one-quarter of Canadians (24%), said they know “nothing at all” about hog farming in 2004. Moreover, interest in learning more has declined since 2002, when 23% said they would like to know more about hog farming. In 2004, only 14% expressed an interest in learning more. Mass media, especially television and newspapers, are the most common sources of information about hog farming.

■ Consumer Needs and Attitudes

Consumers have a focus on health as it relates to the foods they want to eat. 86% of Canadians in 2005 said they “try to eat a healthy diet, but still want to do better”. When choosing foods, quality, nutrition and price are the three most important factors to consumers. Perceptions of quality are driven by taste, consistency, nutritional value and freshness. Overall, 9 in 20 Canadian farmers feel they are knowledgeable about emerging consumer demands.

Figure 7. Knowledge of Consumer Needs by Farmers

Q - How knowledgeable do you feel that you are about emerging consumer demands that effect your farm practices? / - What would you say are the information sources that you rely on to learn about emerging consumer demands as they relate to your farm’s production?



■ Summary Comments

In 1999, when the benchmark study was conducted, the most important issue for non-farming Canadians related to the hog industry was pork safety; it remains so today. However, then, as now, consumers also had strong confidence in product safety.

In 1999, however, the other issue that represented a potential public relations “land mine” for the industry was the impact of hog farming on the environment, when it became evident that hog farming was perceived as less environmentally friendly than farming overall.

In fact, in 2002 and again in 2004, we have seen the importance of the environmental impact rise to be number two in importance.

However, the hog industry has gained ground since 2002 in terms of public attitudes towards hog farming overall.

The vast majority of Canadians form their opinions based on information obtained through mass media. It is important for the hog industry to continue to have a voice in the debate.

■ Conclusions

The improved perceptions of the hog industry among consumers in the face of the increasing importance of impact on the environment and declining knowledge about the industry indicates that the hog industry has successfully engaged in the dialogue via the media.

Over the time that consumer attitudes have been tracked, issues related to the environment have emerged and become entrenched. Large-scale operations continue to be a catalyst for environmental concerns.

Because most consumers are not seeking industry information, it is imperative that any communications from the hog industry be proactive and relevant.

Although most hog farmers feel they are knowledgeable about consumer trends, strategies to adjust hog farming practices to meet these needs are fragmented and individualized. The industry could benefit from a more consolidated strategy.

■ References

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