

# University of Arizona MBA Marketing Research to Reduce Farm Animal Suffering Spring 2015 Final Summary

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## Key Findings

The most important findings from 2015's U of AZ research are:

- At this time, the general public has a negative view of veganism and vegans. Furthermore, "Using the words 'vegan' and 'vegetarian' in the name of a meatless food dish has a negative effect on how the consumer perceives the food."
- 51% of non-vegetarians are open to the idea of reducing meat consumption.
- Meatless Mondays should be an effective tool in reducing overall meat consumption.
- Factors that distinguish people who consume large quantities of chicken from low-chicken-consumption individuals were: tastiness, value, convenience, and healthfulness.
- People believe "eating healthier" means replacing red meat with chicken.
- Of those who had tried vegetarian meats, 68% had tried a veggie burger, and only 12% had tried veg chik'n.
- "People who keep in mind animal welfare when choosing food are willing to pay more and give up taste. What even these ethical individuals are not willing to give up are convenience and family preferences."
- "Price, taste and even health put aside, it seems clear that vegetarian foods should try harder to fill the role of chicken nuggets."
- "A campaign that could unobtrusively and effectively convince chicken/turkey eaters to only reduce their chicken/turkey consumption would have a significant effect on the frequency these people eat meat."

*Key anecdote from time with the class:*

On the last day, the students were offered meatless “chik’n fingers.” Despite everything else learned previously during the semester, it was having these that changed one student’s opinion of veg products. Previously a firm “meat lover,” this student was now willing to explore vegetarian options.

## **Introduction**

In 2014, Sunny (Peg) Raisglid, who owns and runs [Lovin’ Spoonfuls](#) (Tucson’s vegan restaurant), read [The Accidental Activist](#). It inspired her to contact different colleges and universities – including the University of Arizona in Tucson – asking about interest in research into vegetarianism. Professor Merrie Brucks got back to her – Professor Brucks teaches a marketing class in the MBA program there. Every semester, the new class takes on a “client” for whom the class does marketing research. On behalf of VegFund, I was the client this spring semester. (More background [here](#).)

After extended conversations in late 2014 and January 2015, Professor Brucks summarized the goal for the class as: “Develop a comprehensive understanding of the American non-vegan to identify obstacles and opportunities for reducing farm animal suffering.”

I gave an opening presentation to the class, and answered questions for an extended period (Professor Brucks eventually had to stop the conversation, because we had gone over the class time; for details, please see Appendix B). Students were subsequently divided into four groups (Appendix A), and the different groups emailed me with questions and met with me outside of class to discuss their ideas, research, etc.

VegFund provided \$1,000 to allow each group to do national, quantitative surveys (these surveys were developed using their initial, qualitative research). I used VegFund's \$1,000 to set up an Amazon Turk (AT) account for the project; AT was used to do the surveys that gathered the quantitative data in the second half of the class. VegFund provided these resources to maximally leverage the efforts of the class so as to get the most useful data that would allow everyone concerned with farm animals to better advocate for them.

## **Preliminary Qualitative Research**

The four groups first began preliminary, exploratory work to gather qualitative data. The initial process consisted of more in-depth interviews and surveys of individuals. This was done to both utilize the research techniques they were learning in class, as well as to inform the design of their larger final survey.

### **“Vegan” viewed negatively; Chicken healthy**

On February 25, the four groups presented their preliminary results from their qualitative research. Professor Brucks, the class, and I asked questions and gave feedback. A brief summary of the preliminary research (originally published [here](#)) included two very important universal findings – some of the most important take-aways from the entire project:

1. **The public views veganism as much *much* harder than vegetarianism. They also view vegans negatively** (angry, fanatical, judgmental).
2. Also, **the public views chicken as a healthy food**. Every interviewee who talked about health ate a lot of chicken.

A few more take-aways from the qualitative research:

**Group 1: Food Choice Motivations** (general, not veg-specific)

Motivations found (in order of prevalence): health (chicken), religion, animal issues, environment.

**Group 2: Social Perceptions: Norms and Stigmas**

One aspect of Group 2's research is looking at people's perceptions as a ladder: meat lover → omnivore → meat-reducer → vegetarian → vegan.

Most interesting research was their word association. Words like "meat" and "steak" and "chicken" all had positive associations, but "Tyson chicken" and "factory farming" had negative. "Tofu" was neutral, "faux meat" bad ("disgusting").

They asked what a person would choose as their last meal, and the general answer was steak or surf-and-turf. But when asked what one food they would eat for the rest of their life, they said chicken, because it is healthy.

People don't necessarily note when they have meat-free meals. One of the team members was interviewing another team member's roommate, and asked the roommate when the last time the roommate had had a meatless meal was. "Oh, I can't remember. Has been ages." But they had just had vegetarian Pad Thai the night before.

**Group 3: Vegetarian Products and Restaurants**

People don't see vegetarian products as healthier than eating chicken. In general, people think "eating healthier" means replacing red meat with chicken.

People can imagine eating veg for breakfast and lunch, but not dinner. A common comment was the need to have meat to be satisfied. This led to a discussion of Mark Bittman's *Vegan Before Six* idea.

## **Group 4: Animal Suffering**

- This topic is very hard to discuss; people immediately defensive.
- Animal advocates “are often seen in such a negative light that it stops people from wanting to learn.”
- Cognitive dissonance keeps people from fully engaging with the issue of animal suffering.
- People think cows, pigs, and chickens are all treated the same.
- Rationalizations (in order of prevalence): We’re at the top of the food chain, religion, just how it is, healthy to eat meat.
- “People [said] imagining factory farms while food shopping would change their purchase habits, but mental imagery of a family farm wouldn’t.”
- People say it is worse in other countries (e.g. China).

## **Final Reports**

On May 4 and 6, I attended final presentations of the groups’ quantitative research, where I asked various questions and gave verbal feedback. Over the next week, I wrote up further questions and requested various clarifications. Key take-aways from the final reports include:

### **Group 1: Food Choice Motivations**

This group found that, in general, most individuals’ food choices are heavily influenced by other people. However, this isn’t as much the case for vegetarians – they stand against the “social norm” and can serve as influencers: “vegetarians disregard to some extent social influence over them and, quite the opposite, they are a force of change and opinion-leaders in their social circles.”

If people were rich and had a personal chef, they would “eat healthier.” Cost and time are hindrances for people to make what they believe are more optimal food choices.

This group’s initial research had indicated four general groupings of people’s attitudes toward food:

- A. The ethically-concerned healthy consumer
- B. The social binge eater
- C. The busy unconcerned eater
- D. The social foodie

Their quantitative research showed overlap between group B and D (the social aspect of food). The quantitative analysis showed another group as well: those who don’t have control over their food choices (e.g., those living with someone else who shops / cooks, students living in a dorm).

More importantly, though, the quantitative research revealed a further distinction of the people initially put into group A: those concerned with health were more distinct than initially thought from those concerned with ethics (including environmental issues): “the first discourse [group] was split into two distinct segments: Ethical and Healthy.”

The combining factor is higher consumer involvement – thinking more deeply about food. But the ethical and healthy groupings did reveal themselves to be distinct groups. The statistically-significant negative correlations for the ethical group (i.e., the factors they didn’t find important in making food choices) were “tasty” and “inexpensive.” The positive statistically-significant factors were “animal welfare,” “locally grown,” “fair trade,” and “environmentally-friendly.” The positive factors were connected: “all ethical variables are strongly correlated, so caring about one ethical issue means caring about all others.”

Other relevant notes from the quantitative analysis:

- Of the five final groups – Ethical, Social (“eating out”), Busy, Don’t Decide, and Healthy – Ethical was the group that skewed the most female.
- The groups that ate the most chicken were Social and Healthy.
- Factors that distinguish people who consume large quantities of chicken from low-chicken-consumption individuals were: tastiness, value, convenience, and healthfulness. That is, people more concerned with those factors ate more chicken. There was no difference in concern for environmental friendliness or humane treatment of animals between the high and low chicken consumption groups: “Apparently, perceiving chicken as less (more) green or humane is not currently what is making people eat less (more) chicken.”
- Family preference trumps ethics: “People who keep in mind animal welfare when choosing food are willing to pay more and give up taste. What even these ethical individuals are not willing to give up are convenience and family preferences. In fact, what the family likes is even more important for this group.”

### ***Group 1: Summary Implications***

“Lack of time or no concern about what one eats is the main barrier against even considering meat reduction or vegetarianism.”

“Targeting and trying to convert [people who don’t make their own food choices] could easily be a waste of resources, but the definition of this segment reveals an opportunity as well as a threat: identifying and converting a group of decision-makers could have an effect over the household as a whole.”

“There are two big barriers that might prevent them from buying suffering-free: convenience and family preferences. Giving up in price is a trade-off that people understand and accept when choosing ethical foods, but very few will go against family preferences, when they have a

family, or convenience when they do not. Family-friendly foods and convenient ready-to-serve meals should be a priority when advocating for chicken reduction. 'Easy to cook' and 'children love it' are frequent ways to describe chicken. Price, taste and even health put aside, it seems clear that vegetarian foods should try harder to fill the role of chicken nuggets."

## **Group 2: Social Perceptions; aka How is your diet perceived by others?**

Based on their preliminary research, Group 2 broke up respondents into three categories, based on level of meat consumption (listed in declining order): Meat Lovers (eats meat for dinner every day; 44%), Omnivores (doesn't eat meat every dinner, but a majority of dinners; 37%), and Meat Reducers (eats meat once a week or less; 19%). Meat reducers had the greatest concern for how animals are treated; the cruelty argument has the greatest influence with these people.

Group 2 very clearly laid out their key findings, followed by recommendations. The three findings relevant to animal advocacy are:

### ***The demographics of the different consumption level groups are significantly different.***

- The meat reducers have a higher percent of females than males. 63% Female versus 47% female in the other groups
- The meat reducers live on a higher household income, the mean income is \$50,000-\$59,999 compared to \$30,000-\$39,999 in the other groups

### ***People who eat meat at lunch eat more meat at dinner.***

### ***By targeting certain perceptions, you can explain nearly half of the change in a person's meat consumption.***

Level of meat consumption is highly affected by:

- How strongly people feel about if they can go a week without eating meat.
- How strongly people feel that serving meat on special occasions is important.
- Whether or not people eat chicken or turkey.

It is not known exactly how to target people's perceptions of the importance of meat at special occasions. But relevant to advocacy, we should note that people who eat birds eat more meat overall, and people who can imagine going without meat for some level of time eat less meat. As the researchers conclude: "The data indicates that respondents who said that they could easily go a day without eating meat could go a week without eating meat. This link indicates that 'Meatless Mondays' could be an effective tool in reducing meat consumption."

### ***Group 2: Recommendations***

The importance of these two findings – the connection between eating birds and overall meat consumption, and the "foot-in-the-door" approach to meat reduction – are reflected in Group 2's recommendations. In addition to explicit reduction campaigns such as Meatless Monday, their findings lead to the recommendation:

"A campaign that could unobtrusively and effectively convince chicken/turkey eaters to only reduce their chicken/turkey consumption would have a significant effect on the frequency these people eat meat."

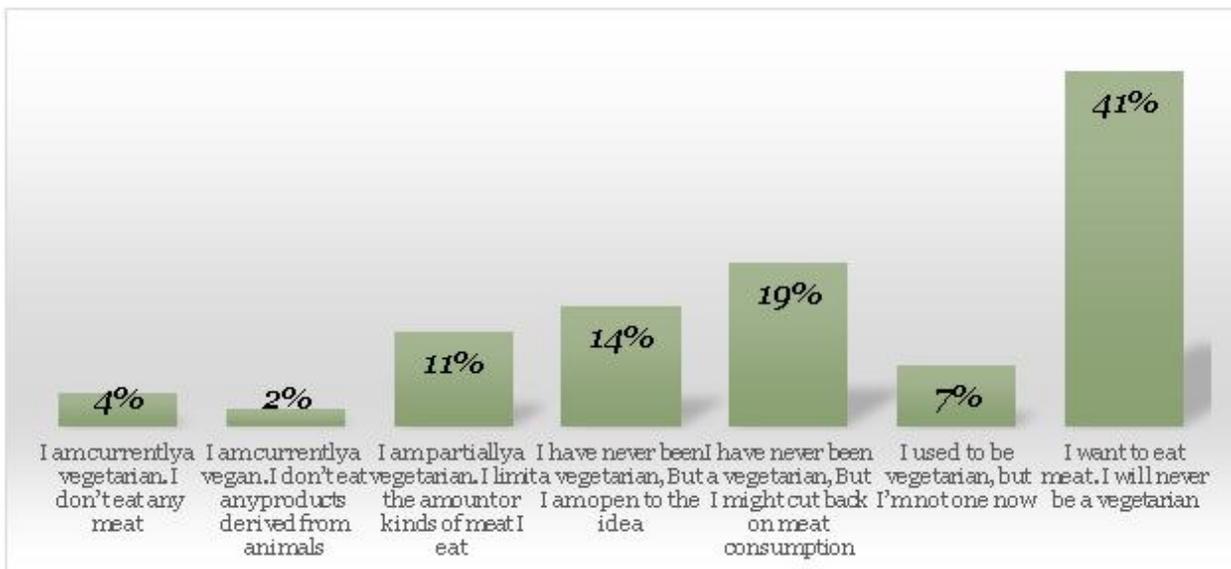
### Group 3: Perception of Vegan & Vegetarian Foods and Restaurants

The main failure of this group was their failure to consider the full implications of all arguments, despite that being one of my specific requests: "One of the limitations in the survey is that we did not consider an option where someone would let go of red meat and choose chicken for health reasons." This is a documented issue (see summaries and sources [here](#)) that require all considerations of arguing "health" to be fully analyzed, not just cherry-picked for vegetarian outcomes.

#### ***A highlight for the entire study***

Group 3's quantitative survey found the following breakdown (because of rounding, doesn't add to 100%):

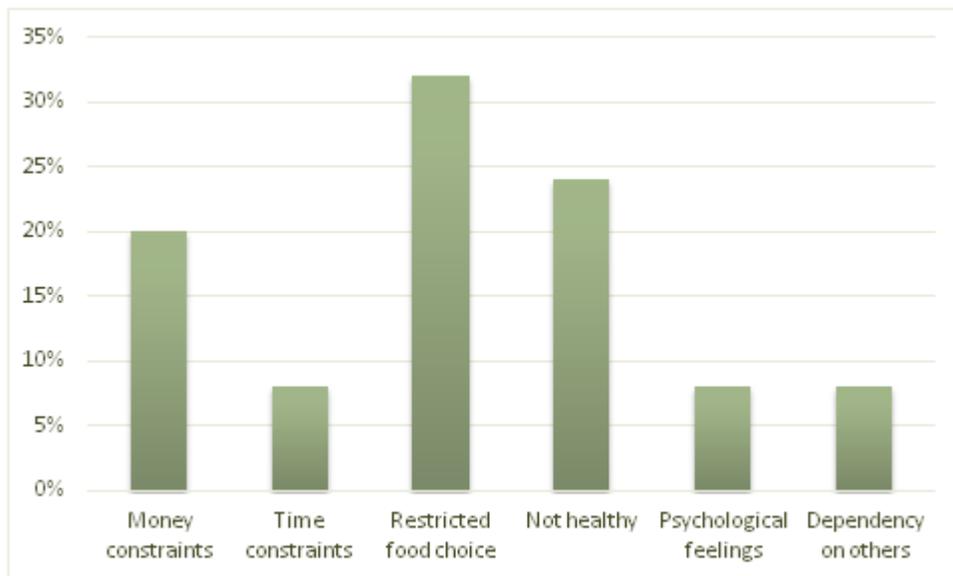
- 2% Vegan
- 4% Vegetarian
- 41% Meat lovers uninterested in changing diet\*
- **51% open to the idea of reducing meat consumption** – a key finding, in keeping with other studies



**\* Note for fans of food sampling:** On the last day, Sunny brought in “chik’n fingers” from Lovin’ Spoonfuls. Despite everything else learned previously during the semester, it was having these that changed one of Group 3’s members opinion of veg products. Previously a firm “meat lover,” this student was now willing to explore vegetarian options. There was a similar incident when having lunch with one of the groups at Lovin’ Spoonfuls: One student said he wanted to take a bunch of the burgers to his friends, but not tell them they were meat-free; he thought they wouldn’t guess. These anecdotes perfectly encapsulate how current cruelty-free foods can sway even the most hard-core meat eater, and how greater awareness about and availability of these products will be [central to further progress](#).

33% of respondents had never tried being vegetarian, but are either open to the idea in the future (14%), or at least cutting back on the meat consumption. 11% are partially vegetarian and currently trying to reduce the amount of meat intake. The remaining 7% are former vegetarians – a smaller percentage than [HRC’s findings](#) in their recidivism study, but still more than the percentage of current vegetarians and vegans.

Of the former vegetarians, the reasons given for going back to eating meat were:



This differs somewhat from the *Psychology Today* [study](#), which found “not feeling healthy” to be the leading cause of people going back to eating meat.

### **Food names**

Interestingly, when testing food names, Group 3 found that people preferred cruelty-free food not labeled as “vegetarian” or, even more so, “vegan.” This is reflected in their lead take-away: “Using the words ‘vegan’ and ‘vegetarian’ in the name of a meatless food dish has a negative effect on how the consumer perceives the food.”

### **Other findings**

Interesting in light of the previous finding that those who ate meat at lunch ate more meat at dinner, Group 3 found that “People tend to eat healthy food for their lunch when compared to dinner. The words like healthy, green, fruits came up more frequently.”

Of the statistically significant demographic findings, Group 3 noted that respondents above 50 years of age are more likely to try meat substitutes (although only 17% of respondents were 50+). Not surprisingly, “Female respondents are more likely to be satisfied with the vegetarian food.”

Finally: For those who had eaten at a vegetarian or vegan restaurant, the main reason was that they were accompanying someone who wanted to eat there.

Of those who had tried vegetarian meats, 68% had tried a veggie burger, and only 12% had tried veg chik’n.

Surprisingly, 39% said “to get more variety in my diet” was the reason they tried vegetarian meats, ahead of animal issues (34%).

#### **Group 4: Animal Suffering**

This group struggled all semester to get a handle on what they were trying to research and how best to actually get at people's true opinions.

Before looking at attitudes towards chickens, Group 4 asked respondents if they had considered reducing their consumption of certain items. Highlights of this question include:

Sugar	83%
Carbohydrates	73%
Saturated Fats	65%
Red meats	55%
Gluten	33%
Chicken	19%
Fish/seafood	11%

You read that right – more people are considering reducing their consumption of carbohydrates than saturated fats or red meats.

To look at perceptions of chickens, Group 4's survey included a series of true/false questions which revealed widespread misperceptions of chickens' emotional and intellectual capabilities. Below are sample questions, along with the percentage of respondents who answered correctly:

Chickens do not have strong long-term memory	31% correctly chose "False"
Chickens are adept at learning new skills	41% (True)
Chickens can form strong emotional bonds with humans	51% (True)
Chickens can sense the emotional distress of other animals and empathize with them	54% (True)

Correct understanding of chickens' emotional and intellectual abilities was correlated. That is, people who believed chickens were smart were more likely to believe chickens led emotionally-rich lives.

***Group 4's Recommendation***

"After respondents viewed the positive and negative images [of chickens], both males and females reported a statistically significant decrease in their intention to eat chicken. After viewing the very negative image, however, only females reported a statistically significant decrease in their intention to eat both chicken and dairy. Our recommendation to appeal to both genders about mistreated commercially raised chickens is thus to use positive and negative images, but not very negative images."

Of note: the "negative" image (not provided in report, but seen in presentation) was a mistreated bird in a cage. This is a similar image:



The “very negative” image was a mutilated dead bird surrounded by other living birds. Similar image:



To my eye, the images were not obviously significantly different in terms of how “negative” they were. It is unclear if the respondents judged the images the same way as the researchers. Furthermore, it is possible the cage is significant in terms of people’s response to the image.

## **General Notes**

Much widely-cited research into dietary choices and advocacy techniques has been done by vegan advocates. This almost inevitably leads to bias, even if only unconscious.

For this reason, it is useful to have a group of mostly non-vegetarian (two out of 20) graduate students in a marketing class start from a general goal – reduce farm animal suffering – and develop and carry out research programs.

Of course, these students are not unbiased; the bias is simply of a different kind. Just as vegans tend to look to anything to justify their diet, so do meat eaters, regardless of how “objective” their goal is to be. It is, for example, easiest to support one’s cognitive dissonance by viewing food choices in terms of personal likes and questions of health. If you can find “research results” that might indicate others’ unwillingness to consider ethical issues, it is possible these results will be highlighted to rationalize the researcher’s actions.

All in all, though, the research was interesting and yielded a surprising number of insights that advocates should study and keep in mind if they really want to make a significant difference with non-vegans in the real world.

We can bring about a world where animals are respected and protected, no longer being viewed as or used for food. This research gives important guidance for our efforts to this end.

## Conclusion

The top three take-aways from this research are:

1. Over half the surveyed individuals are open to the idea of making more compassionate food choices.
2. At this time, use of the word “vegan” is counterproductive to our ultimate goal of building a vegan world. This is true for people’s reaction to the concept, to people who are vegan, and to food labeled vegan.
3. We should pursue advocacy explicitly directed at reducing chicken consumption. Efforts focused in this way will not only have the biggest impact on the number of animals suffering on factory farms, but also have a significant impact on individuals’ overall meat consumption.

Understanding and acting on these insights will allow our efforts on behalf of farm animals to have a significantly greater and more lasting impact.

*Thanks to VegFund for supporting this research, Sunny Raisglid for initiating this work and all her subsequent contributions, Professor Merrie Brucks for her amazing efforts in creating and shaping this research, and to the entire class for their dedicated, thoughtful work. Thanks to Anne & Ellen Green and Bruce Friedrich for their extensive feedback on this project and report.*

## Appendix A: Group Goals

From each report's introduction:

**Group 1:** What are non-vegans' beliefs and motivations (e.g., health, environment, convenience, taste, price, animal suffering, etc.) about food choices (e.g., beef, pork, poultry, seafood, fruits, veggies, grains and starches, pre-packaged, etc.). How do these beliefs/motivations affect changes in food consumption behavior? Which motivations are the strongest? What are the trade-offs? How do your conclusions differ for various market segments?

**Group 2:** The purpose of this project was to analyze and quantify non-vegans perceptions, knowledge and attitudes of vegan's health, lifestyle, demographics and personality traits. This project was commissioned by Matt Ball with the ultimate goal of understanding how these perceptions impact and be manipulated to influence and reduce meat consumption. Ultimately Matt is concerned with reducing aggregate animal suffering by reducing the number of animals that are produced for consumption. To make credible recommendations our team needed data that uncovered unbiased perceptions and revealed true meat consumption influencers.

**Group 3:** Our team was tasked with performing market research in order to analyze non-vegan's perceptions towards food and restaurants positioned as vegetarian and/or vegan. In order to reduce the meat / chicken consumption, the target market had to choose an alternative food choice; vegan, vegetarian or other meatless substitutes. Therefore, it was vital for our client to understand the target market's perception or attitude towards food and restaurant positioned as vegetarian and or vegan.

**Group 4:** Our group's specific research objectives were to find out more about beliefs, knowledge, and attitudes (positive and negative) about animal rights issues, especially in food production. While studies on this topic have been performed before, our objectives included delving into how these topics interacted with each other. Questions in particular our research attempted to answer included the following: To what extent are people cognizant of animal suffering? Does that awareness translate into consumption of meat and chicken in particular? How does imagery of chickens in different states impact consumption of chicken? Along with these questions our research attempted to break out results into groups of respondents which would be most receptive to reducing or eliminating consumption of chicken.

## Appendix B: Preliminary Presentation

The slides for the opening presentation can be viewed online [here](#).



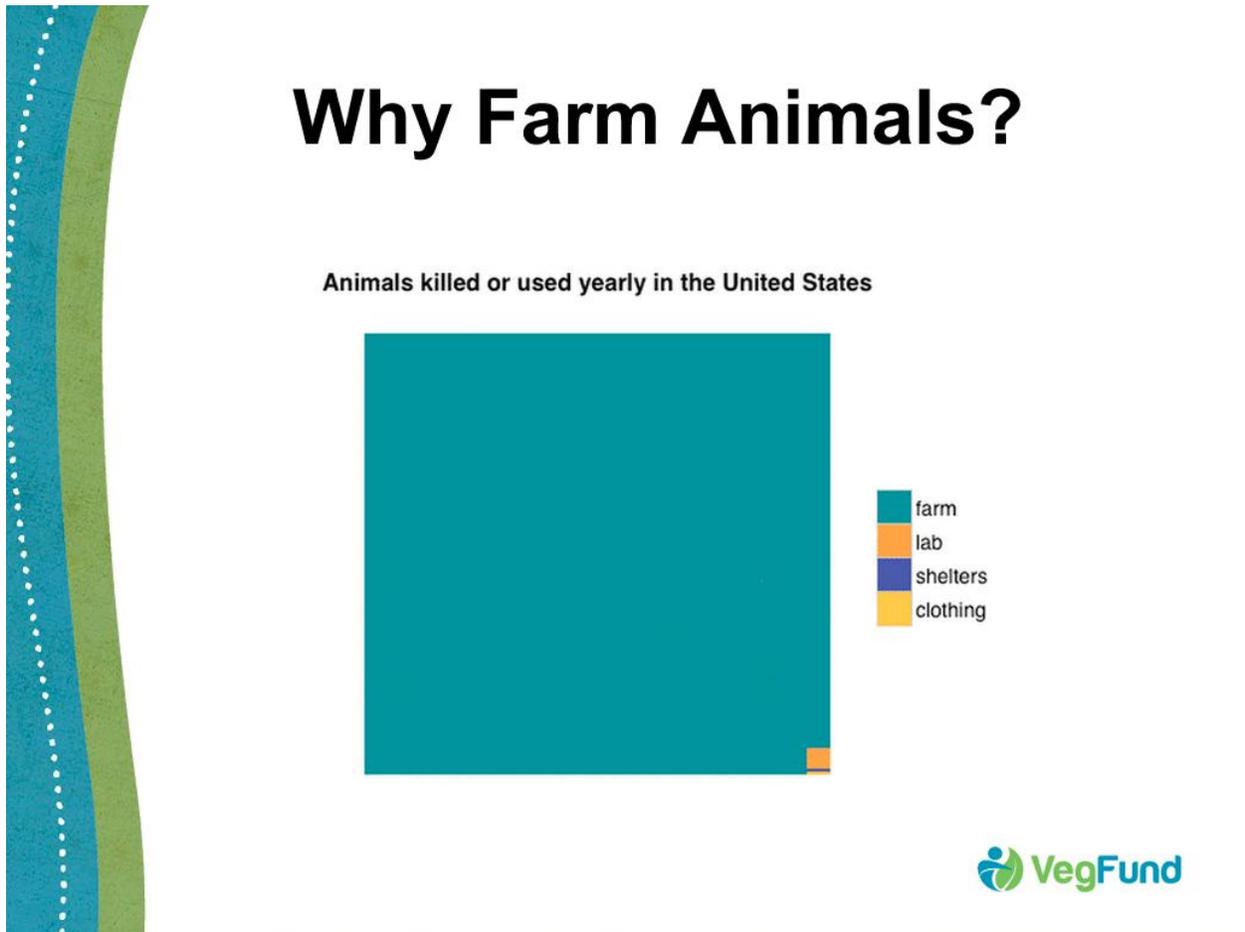
# Marketing to Reduce Farm Animal Suffering

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VegFund.org MattBall.org

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**Key points** made in the presentation included:



Graphic by [Animal Charity Evaluators](#)

- Not looking for arguments that sound good to vegans.
- Want to inform compassionate consumers so their choices lead to fewer animals suffering.
- We would rather have three people move to eating half as many animals, rather than convince one person to be vegan:
  - Meat-reducers currently driving decline in animals killed.
  - Greater upside for further change.

- “People are likely to react to news about the dangers of red and processed meats by replacing these foods with other meats—from fish and chickens—and in the process cause suffering to many, many more animals.”  
*-Ginny Messina, RD*
- The Humane League Labs (THLL): “Dairy is by far the hardest animal product for people to remove from their diet... Vegan advocates may want to refrain from encouraging people to eliminate dairy from their diet until they have already removed other animal products (which are far easier to remove, and which cause more animal suffering).”
- Humane Research Council (HRC): “[A]dvocates should also start to concentrate on messages to reduce consumption of chicken and fish, in particular, given the very large number animals consumed.”
- More HRC: People who go veg for health are much more likely to revert back to eating animals. THLL: “Concern for the welfare of animals on farms is more likely to inspire people to reduce or eliminate animal product consumption....”

A [description of my initial presentation](#) to the class is online.