

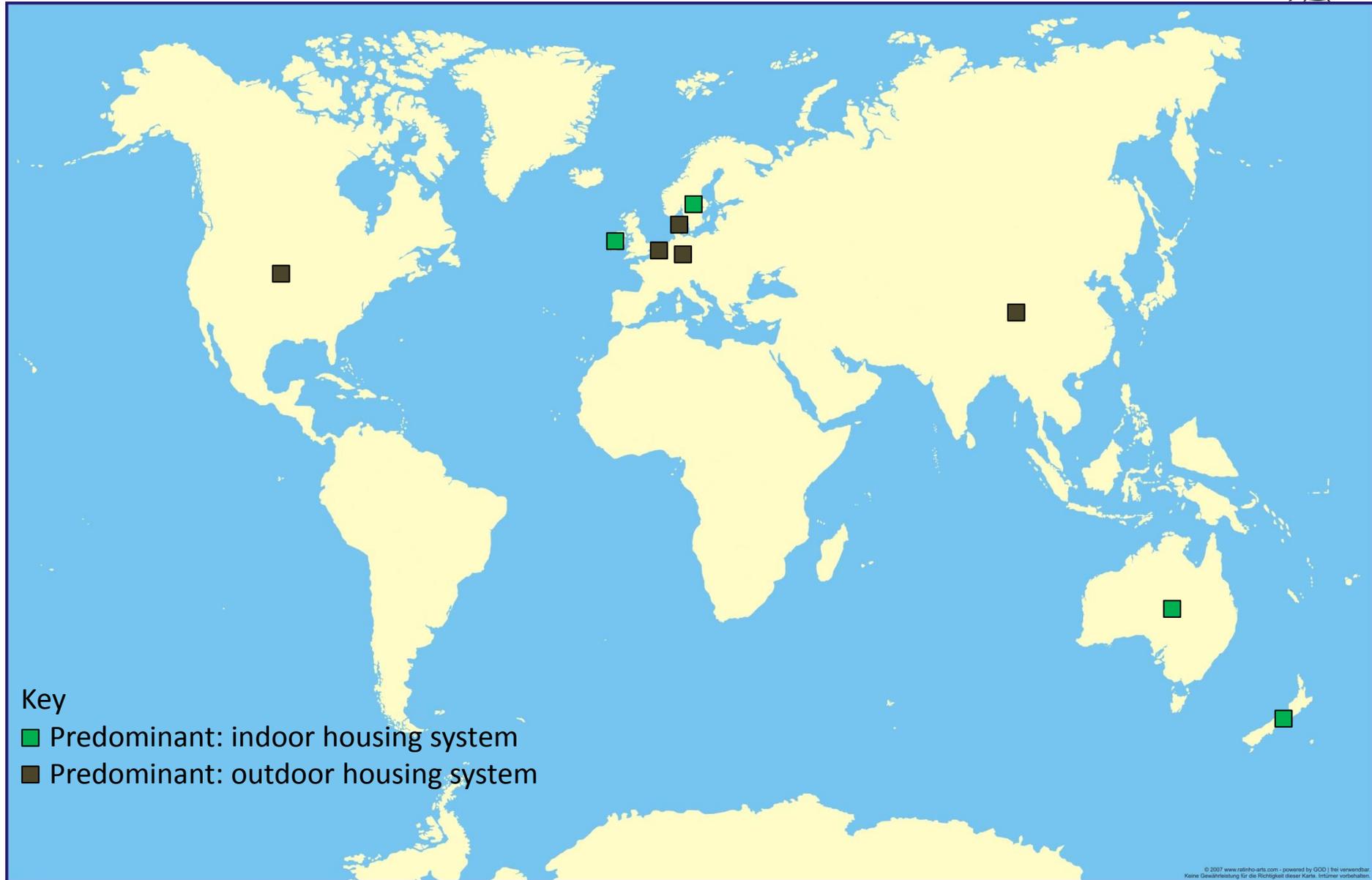
Consumers' attitudes towards different dairy housing systems and implications for pasture-raised milk

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Indoor versus outdoor housing systems





Key

-  Predominant: indoor housing system
-  Predominant: outdoor housing system

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Keine Gewährleistung für die Richtigkeit dieser Karte. Irrtümer vorbehalten.

Present market shares of pasture-raised milk

- Denmark: 20 % (Arla Foods) (Herwaagen et al. 2013)

 - The Netherlands (FrieslandCampina)
 - Switzerland (Migros)
 - USA (Sweet Meadow Farms)
- } Premium products
with the term
“meadow” or “pasture”
-
- Germany: First efforts to launch pasture-raised milk

Recent consumer research

- Segment of consumers which is willing to pay a surcharge (Pirog et al. 2004 [USA], Ellis et al. 2009 [UK], Hellberg-Bahr et al. 2012 [GER])
- Purchasing motives:
 - ✓ Animal welfare aspects (Ellis et al. 2009)
 - ✓ Environmental aspects (Ellis et al. 2009)
 - ✓ Expectation of healthier products (Hellberg-Bahr et al. 2012)
- However, for some consumers the higher price is still a barrier to purchase these products (McEachern and Schröder 2002, Padel and Foster 2005, Plaßmann and Hamm 2009)



Consumer-citizen gap

Research questions

Gap

- The difference in the housing systems is not the focal point in the consumer research

Aim

- For strategic decision it is important to learn more about consumers' attitudes towards different housing systems

?

- How important is pasturing for consumers?

?

- How is the image of indoor systems?

Empirical research

- Representative sample with 1,009 German consumers
 - ✓ Quotas were set for age, gender, education and regional distribution
- Factor and cluster analysis
- Results of the cluster analysis: four clusters
 - ✓ “Quality-conscious” (n = 281)
 - ✓ “Undecided” (n = 179)
 - ✓ “Generalists” (n = 257)
 - ✓ “Pasturing-supporters” (n = 283)

Results of the cluster analysis

Quality-conscious	Undecided	Generalists	Pasturing supporters
n = 281	n = 179	n = 257	n = 283
<ul style="list-style-type: none"> • Support pasturing 	<ul style="list-style-type: none"> • Neither support nor reject pasturing 	<ul style="list-style-type: none"> • Rather support pasturing 	<ul style="list-style-type: none"> • Support pasturing
<ul style="list-style-type: none"> • Neglect indoor systems most strongly 	<ul style="list-style-type: none"> • Neither support nor neglect indoor systems 	<ul style="list-style-type: none"> • Rather support indoor systems 	<ul style="list-style-type: none"> • Neglect indoor systems
<ul style="list-style-type: none"> • Strongly quality-orientated 	<ul style="list-style-type: none"> • Have no preference for quality 	<ul style="list-style-type: none"> • Quality-orientated 	<ul style="list-style-type: none"> • Have no interest in quality
<ul style="list-style-type: none"> • Less men, more women • Higher education level 	<ul style="list-style-type: none"> • More medium education level • Less of the lowest education level 		<ul style="list-style-type: none"> • Lower education level • Lowest income classes

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Consumers differ in their attitudes towards their housing systems and their quality orientation

Strategic conclusions

Indoor housing systems have negative connotations

More than 50 % of the respondents consider pure indoor housing systems as problematic

Obviously, many consumers have clear preferences for pasturing

This attitude already has become a severe image problem regarding the keeping of laying hens in cages

Honest and transparent standards and an appropriate labelling system for pasture-raise milk have to be built up in the near future

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