

 Farmed Animal Funders

STATE OF THE MOVEMENT REPORT: 2021

*Global trends in
philanthropy fighting
factory farming*





Background

Over the course of 2021, [Farmed Animal Funders](#) (FAF) surveyed ~2,000 charitable organizations around the world fighting factory farming. The goal of that survey was to provide a clearer picture of the allocation of funding within the movement to end industrialized animal agriculture, reduce meat consumption, and alleviate farmed animal suffering. Two hundred and fifty-five organizations responded to our survey. This report outlines key findings.



Executive Summary

- The estimated the size of the movement to fight factory farming in 2020 was ~\$200 million USD with year on year growth of 10% or more in recent years.
- Of the \$200M donated globally, only \$37.5 million USD (less than 20%) is spent outside of the United States, United Kingdom, and Western Europe.
- There are no clearly apparent issues with the allocation of funding across sectors. A sub-level analysis suggests some types of work appear under-funded.
- Some farmed animal species (like fish and invertebrates) are much more neglected in terms of funding than others, which is probably not optimal.
- These three emerged as key goals for the movement in 2021:
 - Plant-based campaigns
 - Movement building
 - Welfare gains
- Generally, funders in this movement are new (~50% of members of Farmed Animal Funders have been donating in this sector for <5 years) and North American.



Overview

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I. Methodology



I. Methodology

- This is FAF's fourth landscape scan survey. It focuses on:
 - Where funding to help farmed animals goes geographically
 - What types of interventions and strategies are being pursued
 - Which organizations receive funding from members of FAF
- Please note that this slide deck covers key takeaways.
- All figures reported are in USD.



II. Response Details



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- The average completion rate for the survey was **97%**.
- The lowest completion rate included in the results was 37%, which corresponds to only filling out the first section of the survey.
- The median time it took to complete the survey was **54 minutes**.
- From this, we can infer that these are high quality responses.





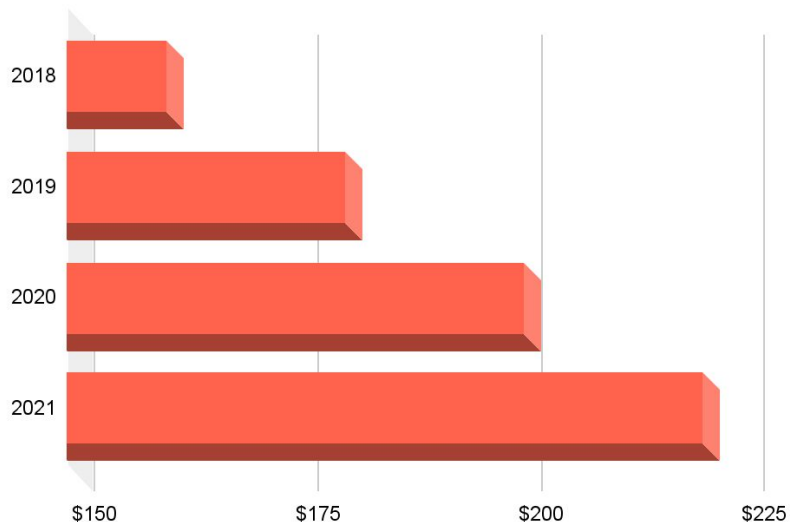
III. Budget Sizes

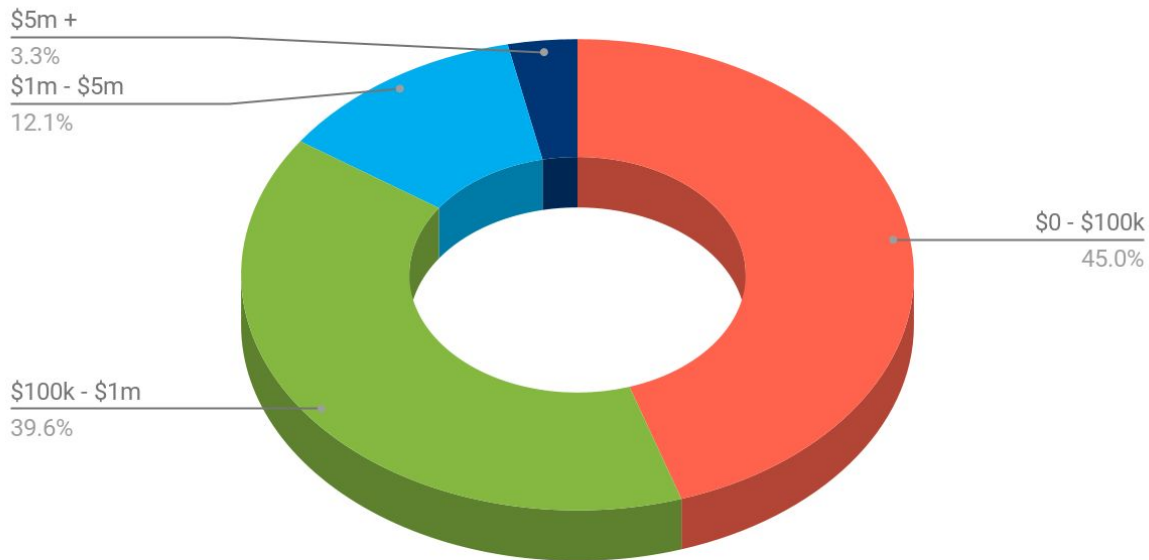


III. Budget Sizes

- By summing the 2020 farmed animal relevant expenditures from our survey, we believe the size of the movement to fight factory farming to be **~\$200 million USD**.
- Since we've conducted this survey a few times now, we can compare expenditures over time. One noticeable outcome is that the movement as measured by total dollar size is growing, and growing at what could be described as a quick pace.

Budget (millions) vs. Year





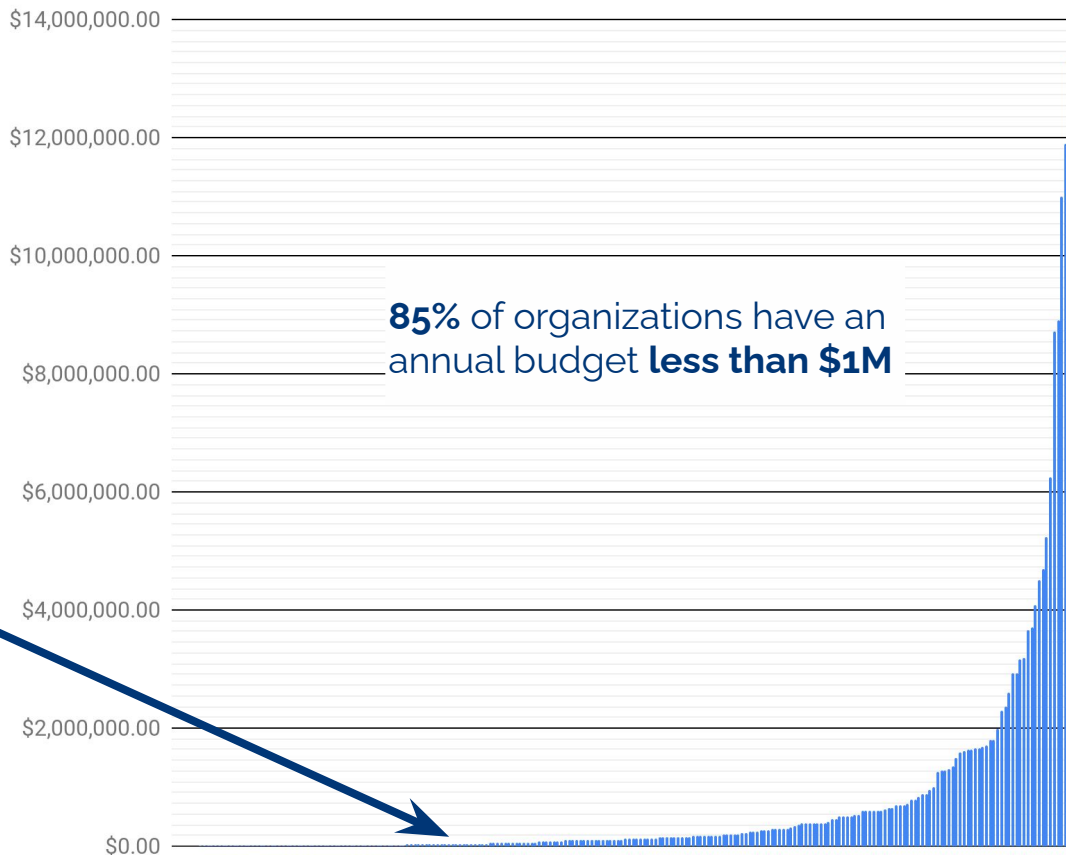
Small organizations (<\$100,000) make up almost ½ of respondents, but less than 5% of expenditures

Large organizations (>\$5 million) account for 3% of respondents, but almost ½ (45%) of expenditures

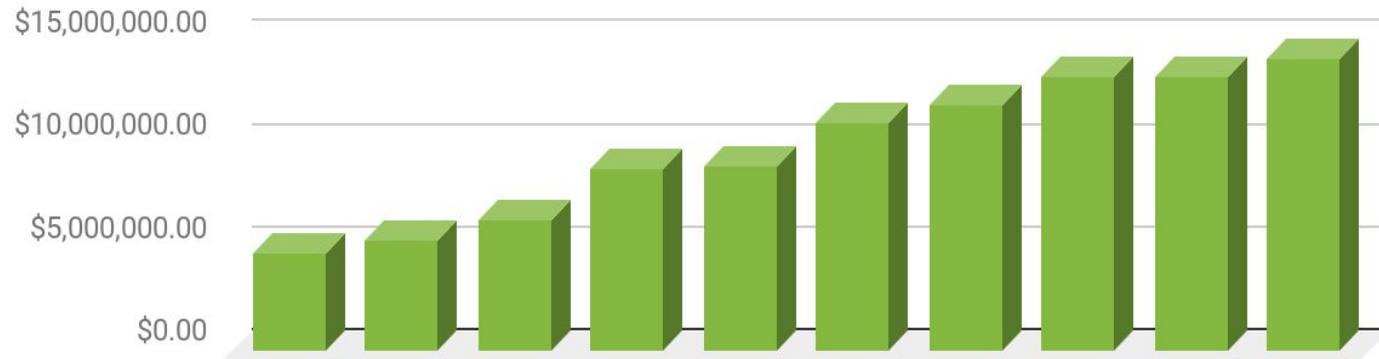
Medium organizations (\$100k-\$5 million) make up the remainder and ~50% of overall expenditures



50% of organizations have an annual budget **less than \$140k**



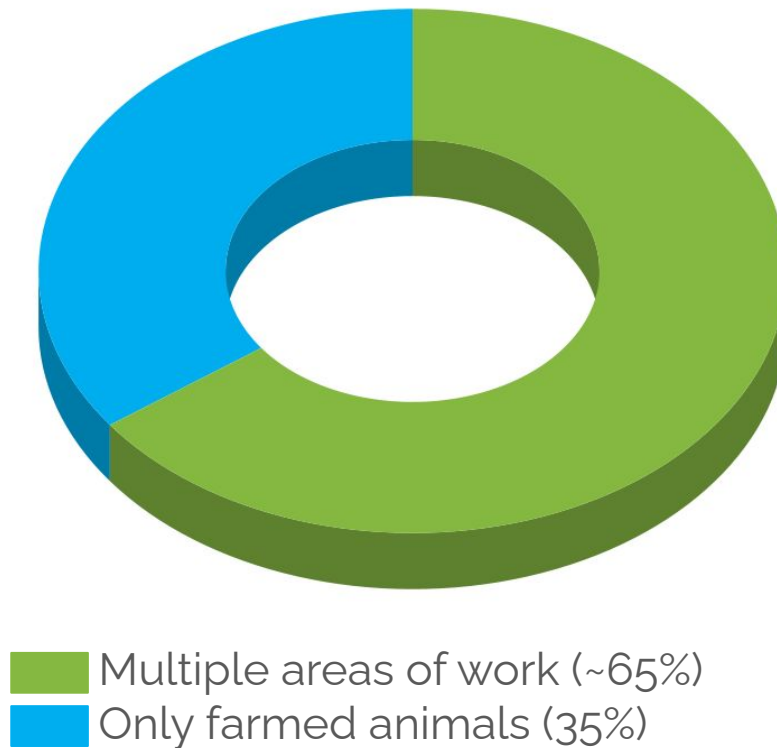
3% of organizations have an annual budget **\$5M+**



- The largest groups in our sector had budgets spanning from ~**\$5M - \$15M**
- These top 10 have consistently been the largest groups over the past few years
- Together, these groups make up close to $\frac{1}{2}$ of the movement's total expenditure

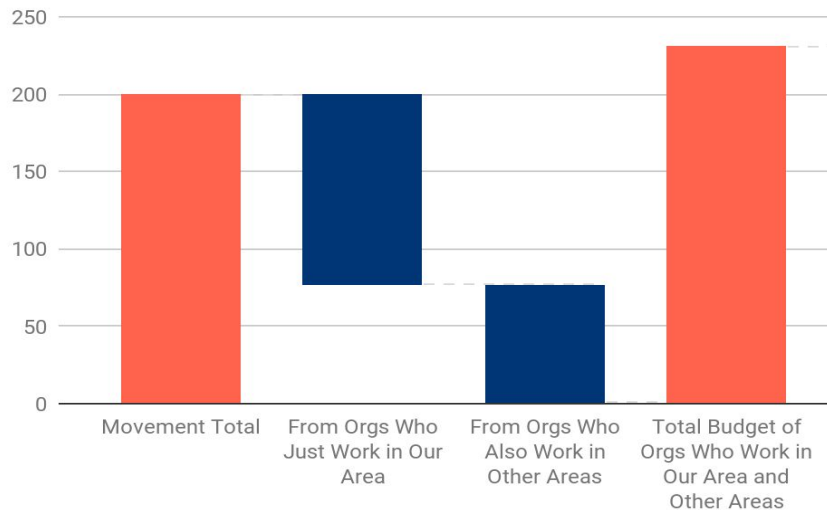


A majority of organizations participating in our survey (~65%) reported working in areas other than farmed animal advocacy



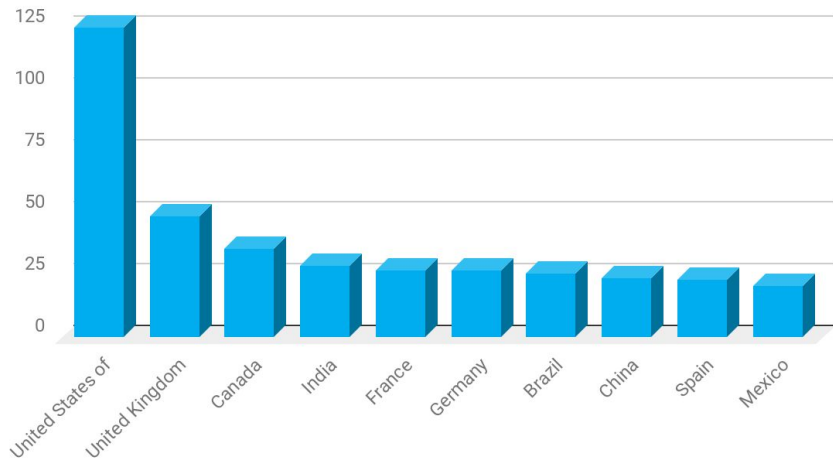
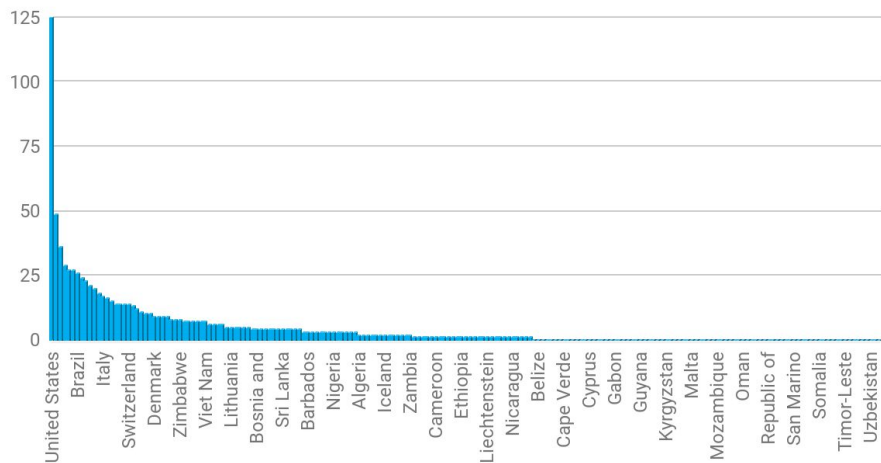


The sum of expenditures from organizations in our sector who work in other areas came to \$230 million. Of that \$230M, only \$77M (~33%) went to fight factory farming. **Most of the money in our movement is spent by organizations who exclusively work to fight factory farming; ~\$123M (~62%) of the \$200M total.**





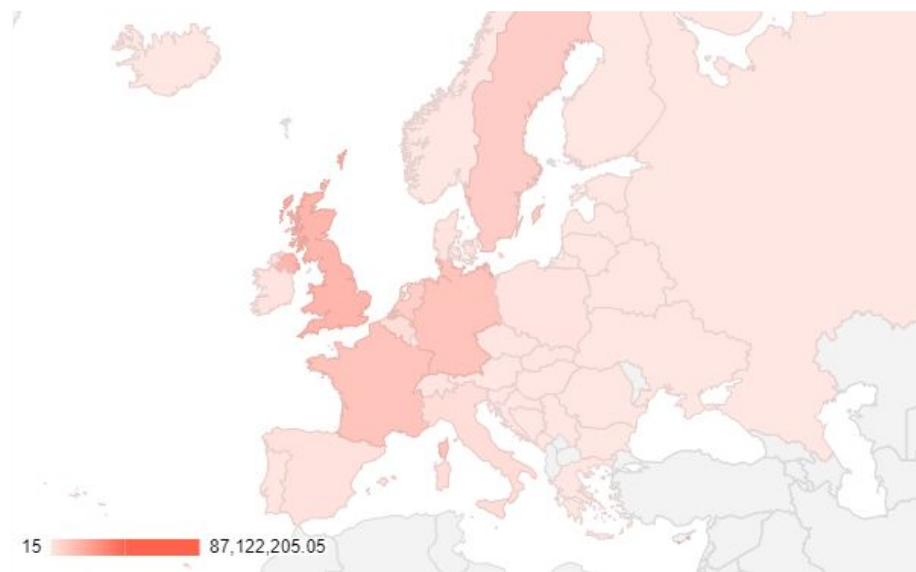
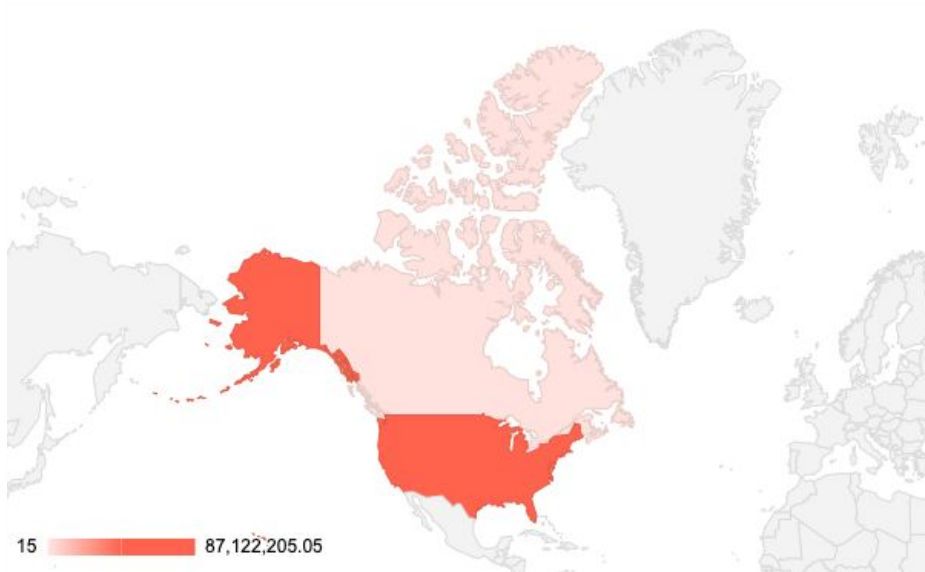
IV. Geography



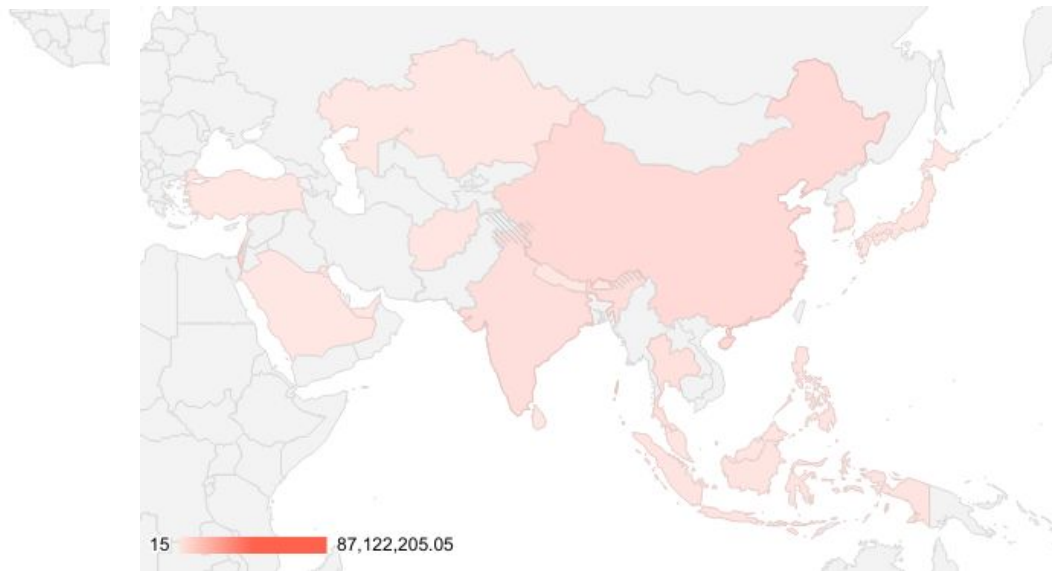
IV. Geography

The United States has, by far, the most organizations working to fight factory farming followed by the United Kingdom.

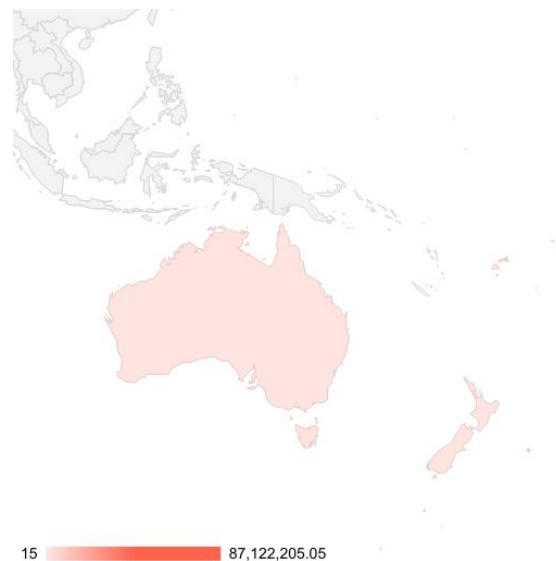
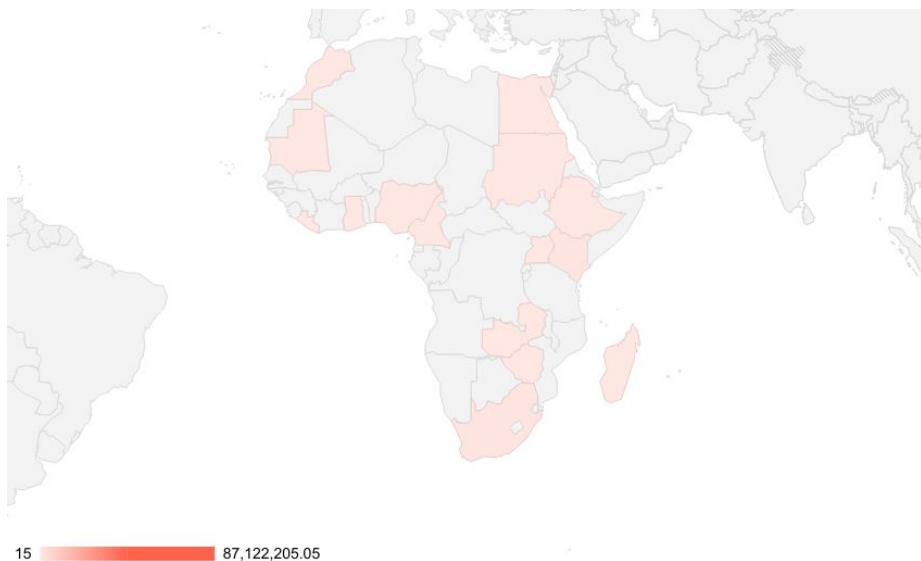
~70% of organizations reported working in just one country. **On average, organizations in our sector are active in three countries.**



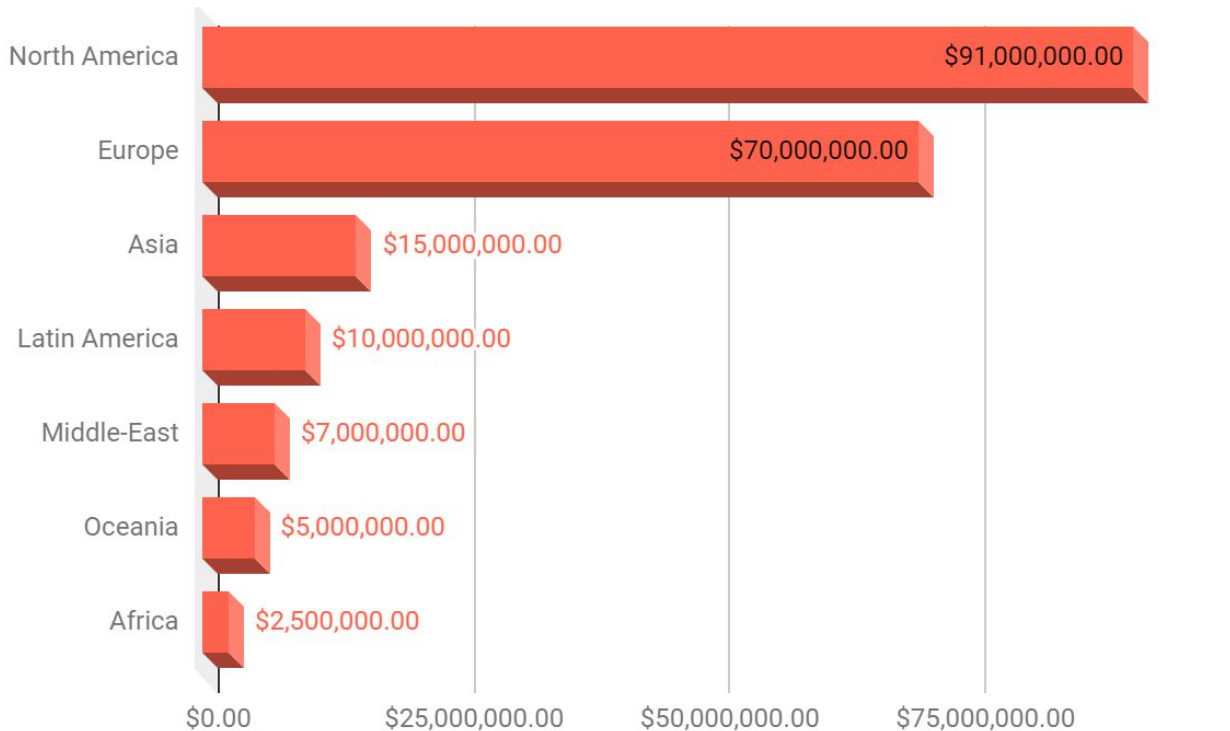
In terms of the allocation of funding within our movement, it is perhaps no surprise that, by a wide margin, the U.S. is in the lead. Money to fight factory farming overwhelmingly is spent in the U.S., U.K., and Western Europe. **Of the \$200M donated to our sector globally, only \$37.5M (<20%) is spent outside of the U.S., U.K., and Europe.**



It's worth belaboring this point: **there's a significant difference between where funds go and where animals are farmed and consumed.** There is far less money going to some countries, especially in South America and Asia, where large numbers of animals are farmed. This seems particularly true in some Asian countries where the number of farmed fish is particularly high like China, India, the Philippines, and Indonesia.



The same story holds true for other parts of the world, importantly Africa and the Middle East, and to a lesser extent Oceania. Relative to the U.S. and Europe, very little work is happening to fight factory farming in those regions (with Israel being a significant exception). **Many countries and even important regions of the world lack a philanthropic movement to fight factory farming.** Indeed, the survey indicates a lack of activity in ~80 countries.



80% of funding flows to North America and Europe, with only 20% flowing to the rest of the world.



V. Types of Work



V. Types of Work

In addition to looking at *where* organizations spend money, we wanted to better understand *how* organizations spend money. **With significant and greatly appreciated help from Laura Driscoll at [Stray Dog Institute](#)**, Farmed Animal Funders provided survey participants with the option of selecting which types of work they perform. The options were:

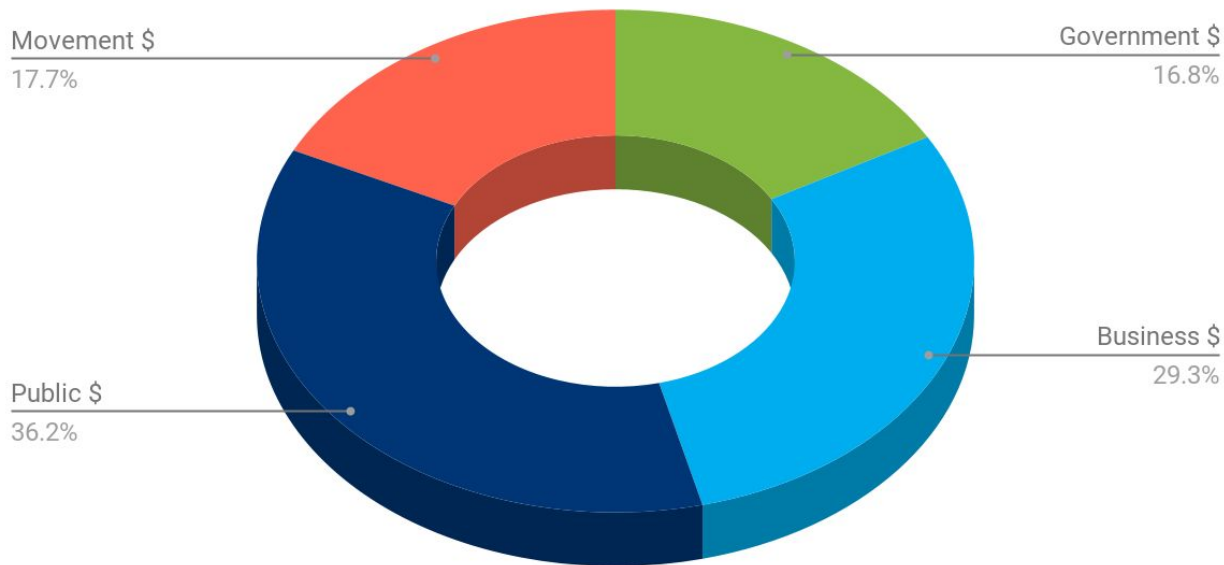
- Government
- Business
- Public
- Movement

Participants could select how active they were in each category by percent. Within those four categories, we offered a number of different subcategories for types of work. For instance, within the government sector, the options for subtypes were: regulations, legislation, public officials, and other. **You can see the full list of options provided to participants on the next page.**

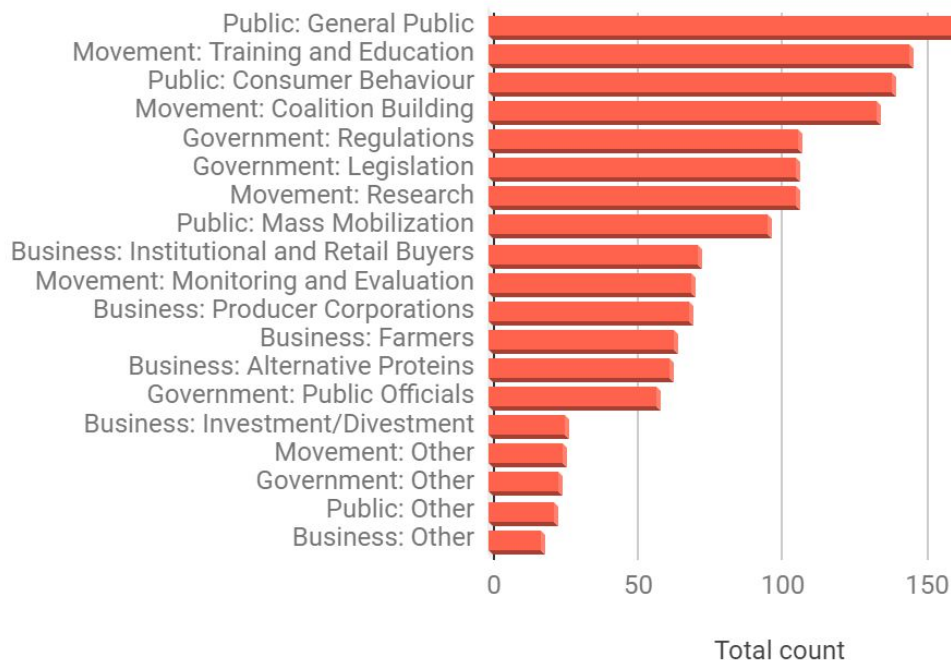


Types of Work

Government	Regulations - e.g. administration, policies, regulations
	Legislation - e.g. legislature, laws, direct lobbying
	Public officials - e.g. elections, electioneering, political appointments
	Other - (later you will be asked to expand on this answer)
Business	Farmers - e.g. independent primary producers, family farmers, tenant farmers, contract producers for integrators
	Producer corporations - e.g. agribusiness, large brands, integrators, processors, distributors, corporate food manufacturers
	Institutional and retail buyers - e.g. institutional buyers (hospitals, schools), retail buyers (restaurants, grocery, catering)
	Alternative proteins - e.g. alternative proteins, plant-based supply chain, entrepreneurship, start-ups, venture capital
	Investment/divestment - e.g. influencing public and private investment to industrial agriculture and meat producers
	Other - (later you will be asked to expand on this answer)
Public	General public - e.g. shifting attitudes and values, print and electronic mass media, billboards, events, sanctuaries
	Consumer behaviour - e.g. consumer purchasing behavior, dietary change, raising awareness of issues and labels
	Mass mobilization - e.g. activating public organizing, mass public actions
	Other - (later you will be asked to expand on this answer)
Movement	Training and education - e.g. internal training programs, leadership, staff education
	Monitoring and evaluation - e.g. evaluations of programs and analysis of impact
	Research - e.g. research, scholarly works, peer-reviewed articles, academic partnerships
	Coalition building - e.g. combined efforts and actions, opportunities for collaboration, information-sharing
	Other - (later you will be asked to expand on this answer)



At the macro level, **there appears to be relatively equal distribution of funding across different types of work.** Tentatively, the public and business categories seem relatively well-funded, whereas perhaps the movement and government categories appear comparatively under-funded. An interesting picture emerges when we zoom in within each of these four categories of work.



The **most frequent types of work**

performed by survey participants were:

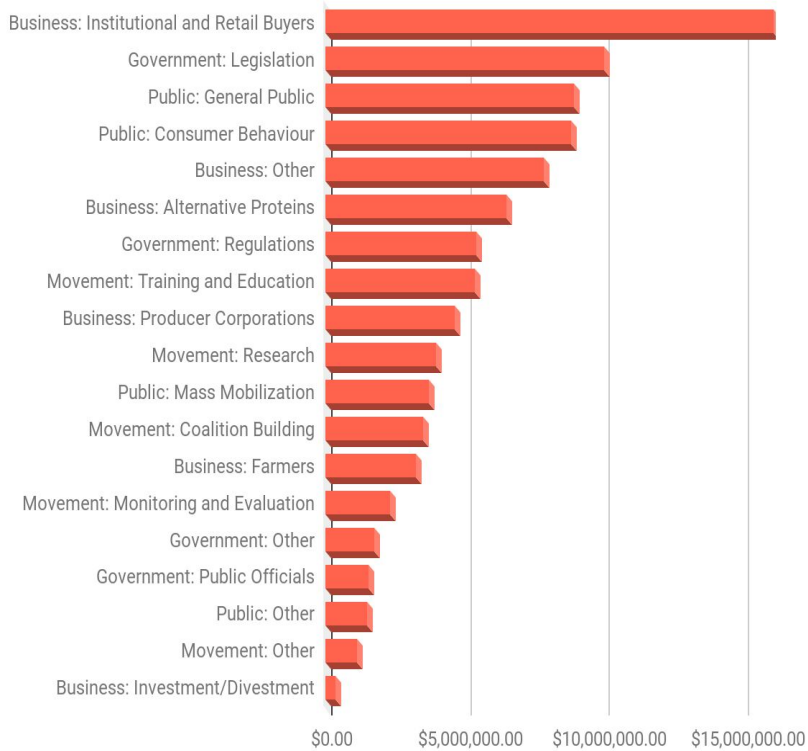
- General public
- Movement training & education
- Consumer behaviour

Some of the **least frequent types of work**

performed by survey participants were:

- Public officials
- Alternative proteins
- Investment and divestment

While frequency matters, it doesn't provide the full story. To better understand what's happening (and what isn't), we looked into how *active* charities are within each type of work.



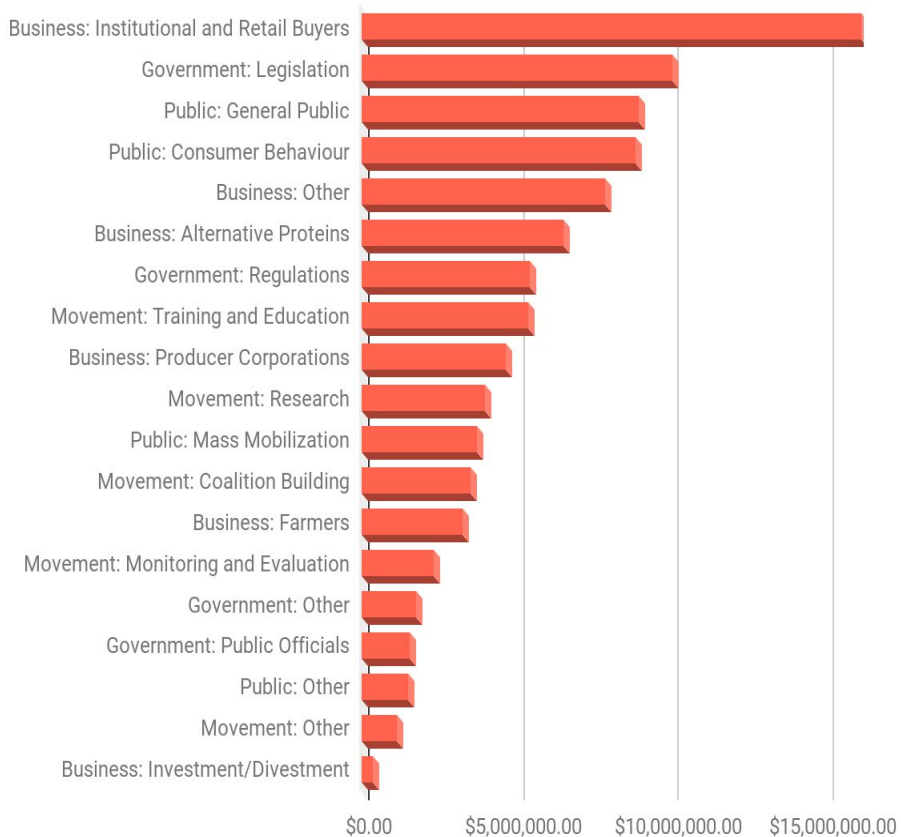
Roughly 120 organizations estimated how they allocate their budget across these different types of work. Takeaways include:

- **There seems to be a focus on institutional and retail buyers** within businesses, a majority of which occurs through corporate welfare campaigns.
- **There's significant focus on legislation within the government sector**, but notably less on other types of work within the government sector.
- **There's a dual emphasis on general outreach and efforts to alter consumer behaviour** within the public sector.



On the other end of the spectrum, it seems that participating organizations have a **relatively limited focus on:**

- Investment and divestment
- Public officials
- Monitoring and evaluation
- Farmers

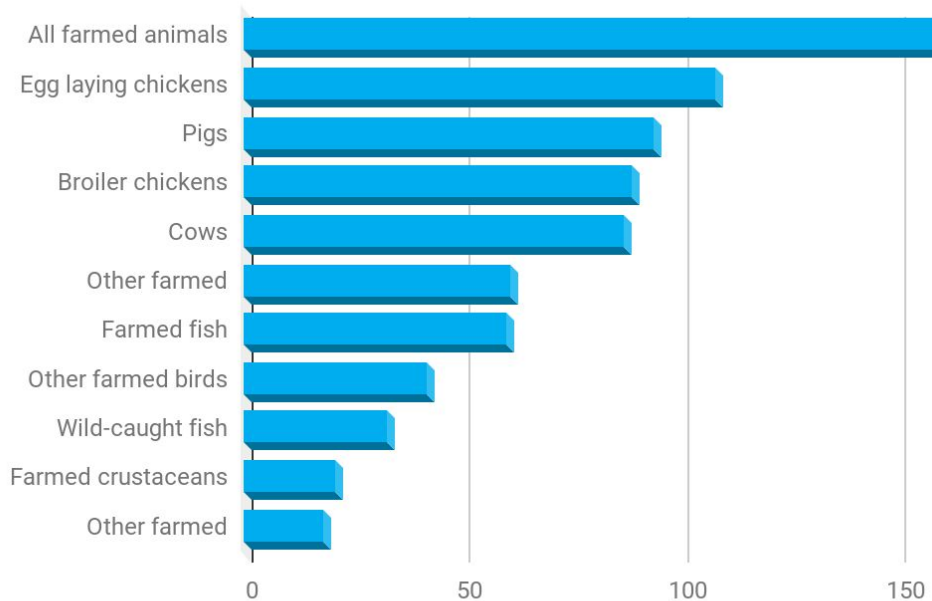




VI. Work by Animal Type



V. Work by Animal Type



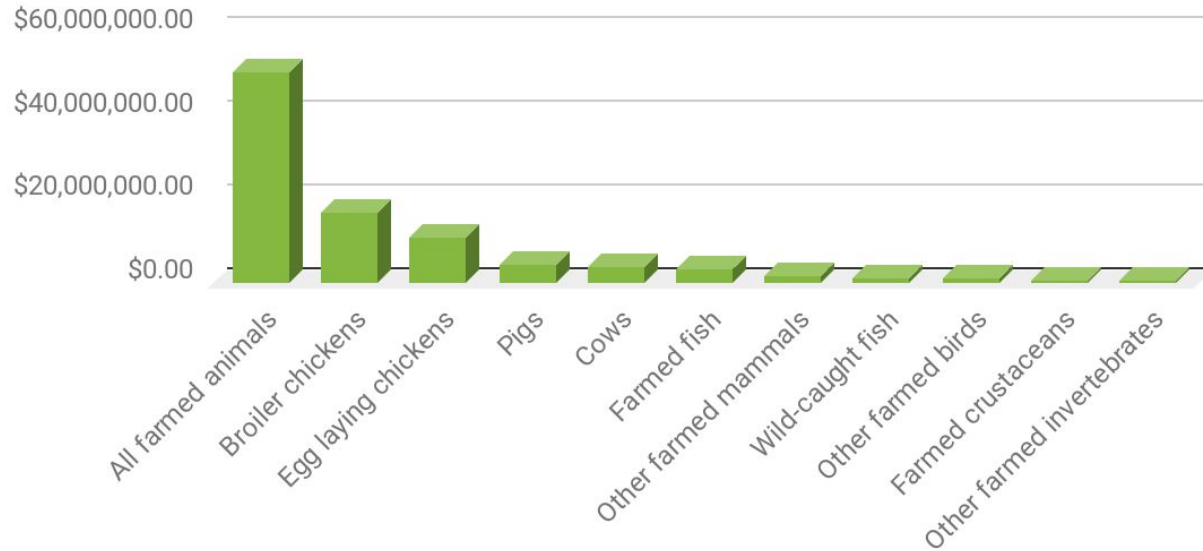
Organizations reported **most frequently** focusing on these types of animals:

1. All farmed animals
2. Egg-laying chickens
3. Broiler chickens and cows

Organizations reported **least frequently** focusing on these types of animals:

1. Fish
2. Crustaceans
3. Other farmed invertebrates

While frequency matters, it doesn't provide the full picture.

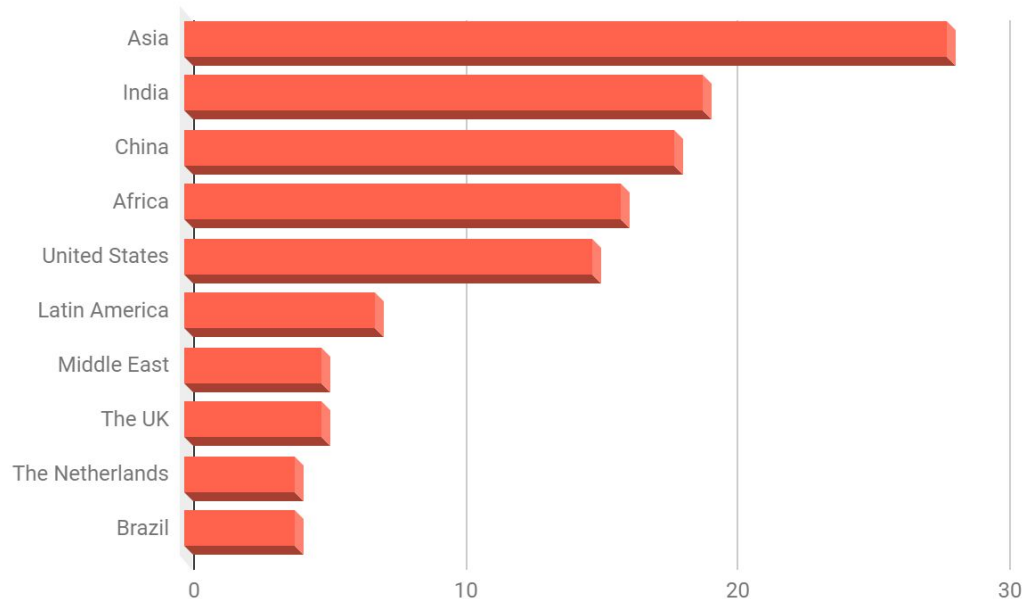


Again, not every organization filled out this section of our survey; ~120 organizations gave an estimate for how much money they spend to benefit each type of animal. Most respondents reported their expenditures benefitting all farmed animals. Farmed fish, crustaceans, or other farmed invertebrates appear to receive very little funding. **It's worth noting that some of the most numerous types of animals (like fish and invertebrates) receive the least funding.**

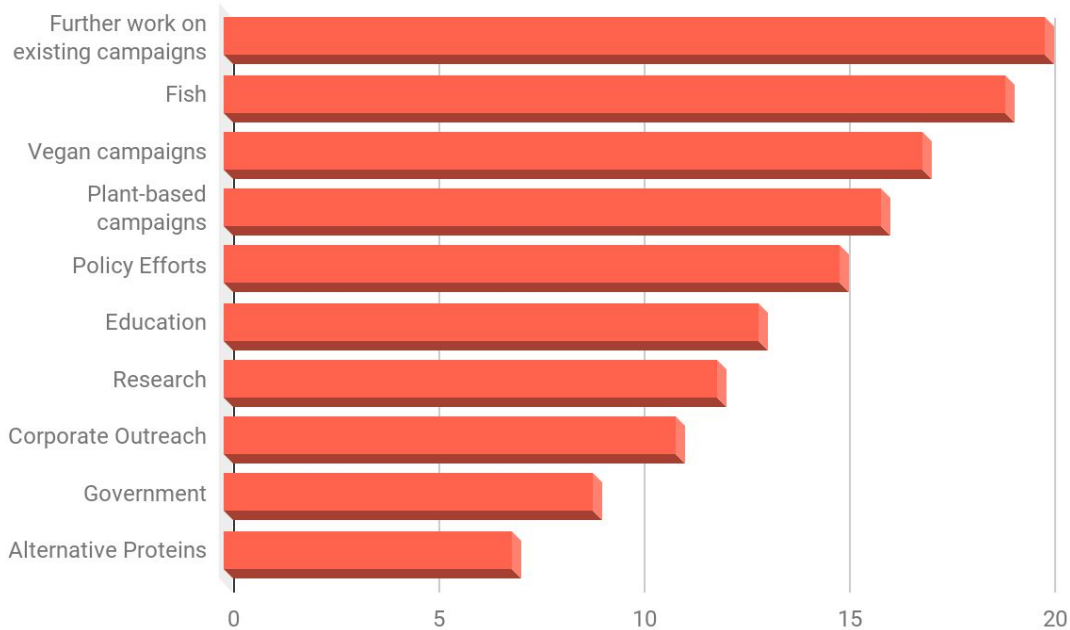


VII. Qualitative Results

We invited survey participants to share qualitative data about their work



We asked survey participants about their expansion plans to help paint a picture of how our movement might grow. **Asia was the most-often-mentioned region for expansion,** particularly India and China, followed by Africa. Many NGOs also foresee growth in the U.S.



Further work on existing campaigns is the most popular programmatic expansion plan, followed by work on fish and a variety of plant-based or vegan campaigns. Most survey participants are also interested in expanding into policy work.

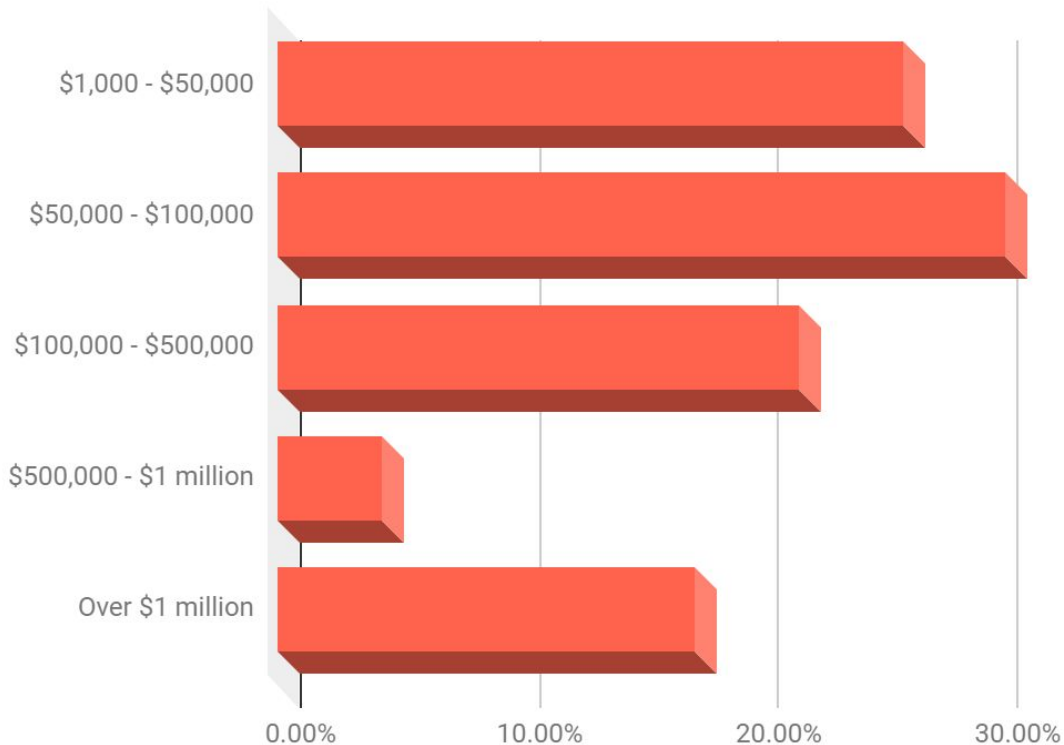


VIII. Funder Data and Interests



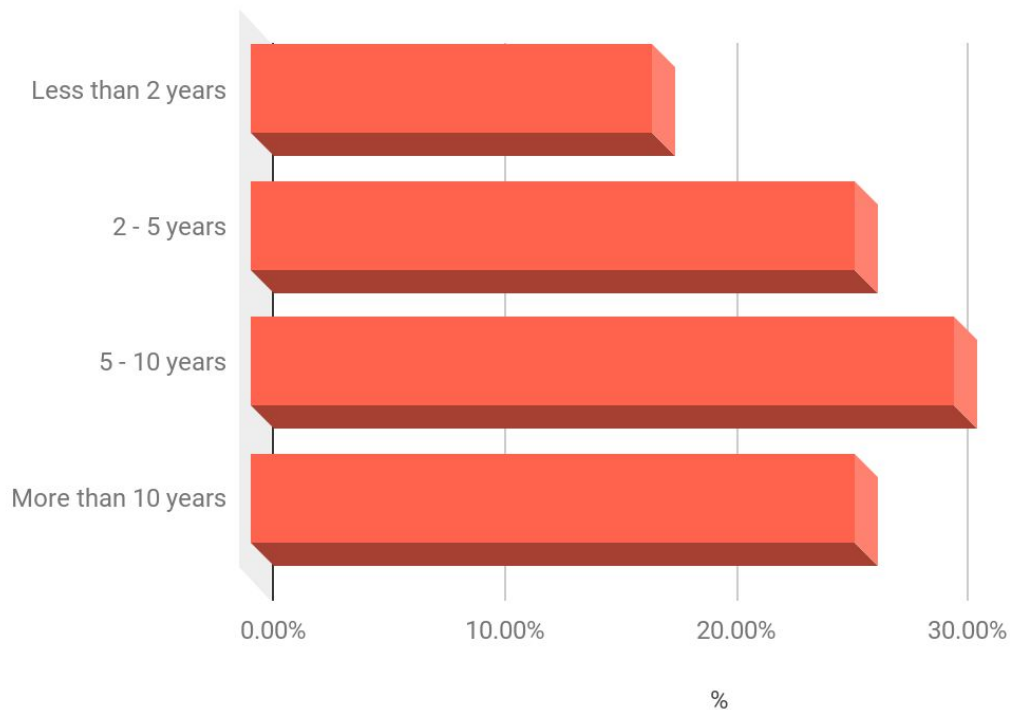
FAF members range from having only a couple of grantees fighting factory farming to several tens of grantees. **The median number of grantees for FAF members was 20.**

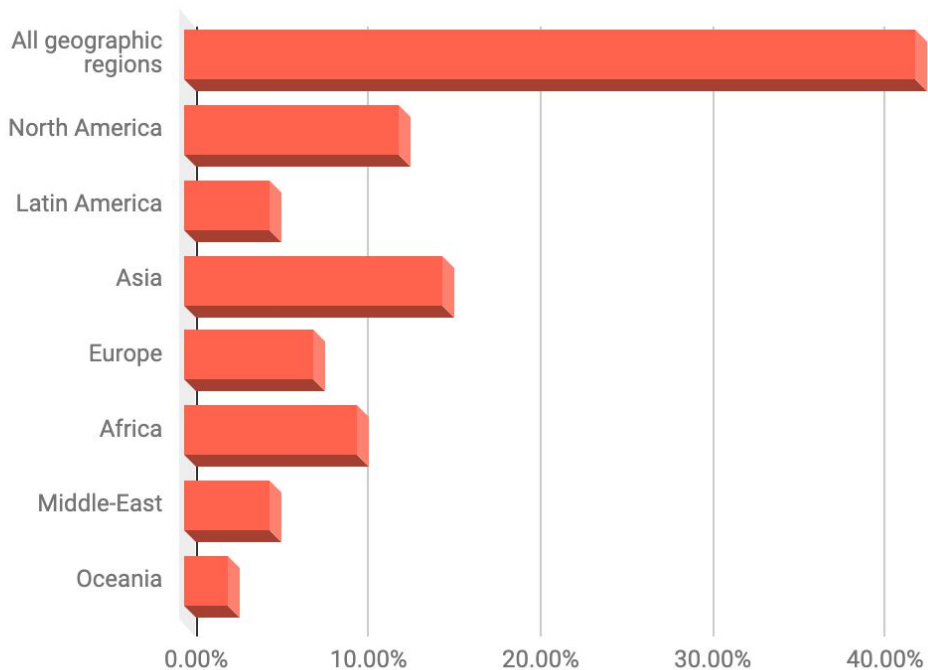
Grant sizes vary a lot between funders. Most often, FAF members donated \$50k - \$100k per NGO (see chart→).





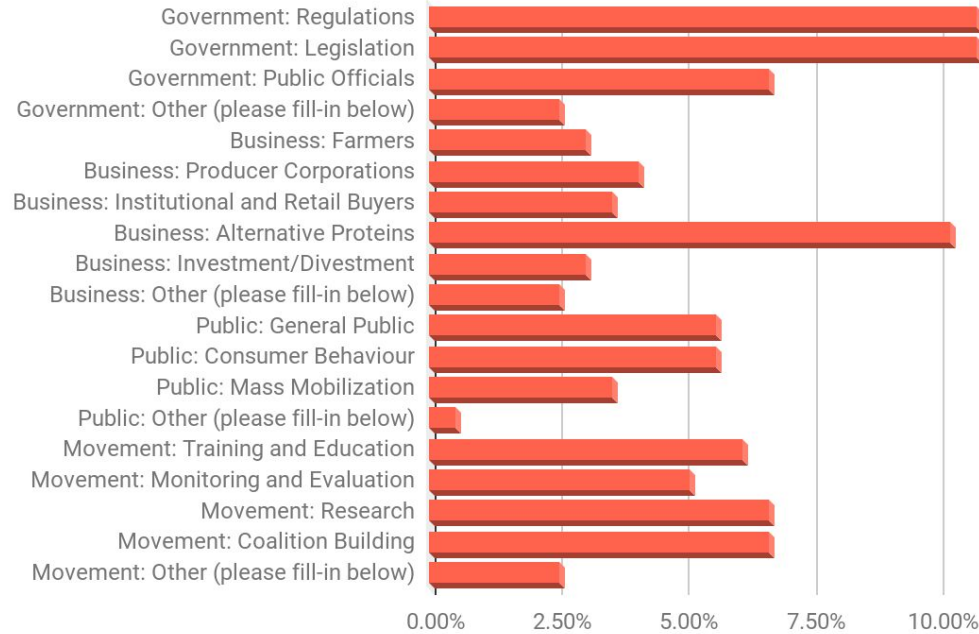
Interestingly, there is about an equal split between the number of funders who have been giving in this sector for 5 years or less and five years or more. That helps describe the nascency of our sector. **About half of the movement's biggest funders have been involved for five years or less.**



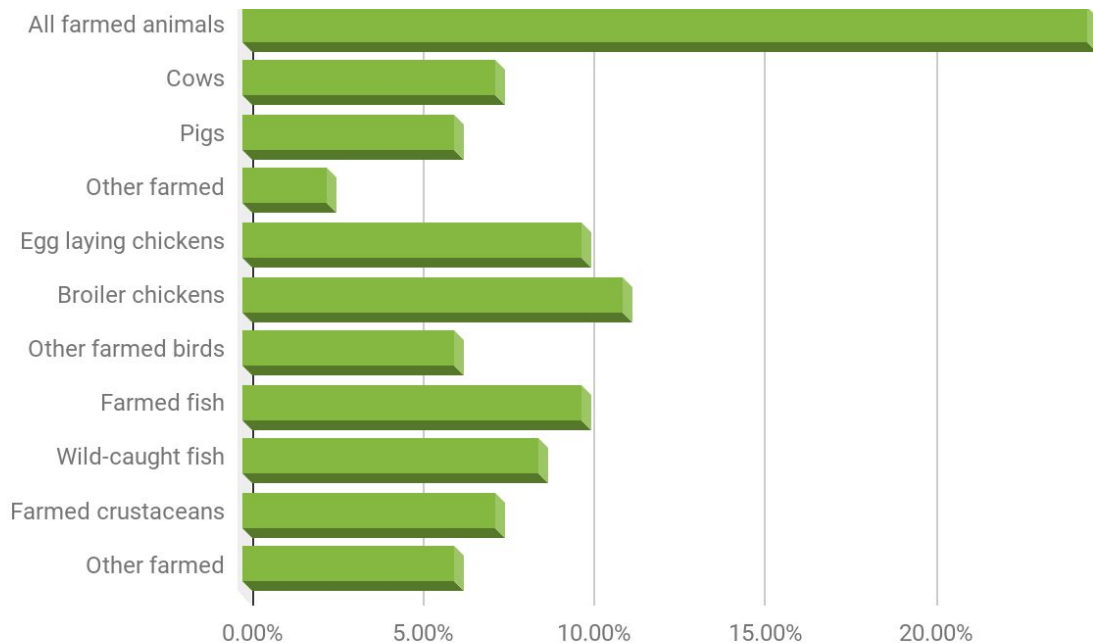


Most FAF members are interested in funding projects to fight factory farming *everywhere*. After that, they seem to **prioritize Asia, North America, and Africa** (← see chart).

There is a discrepancy between FAF members' geographic interests and the locations of their actual grantees. We expect more money to flow outside of North America and Europe in the coming years, should FAF members act upon their stated interests.



FAF members were most interested in supporting government regulations and legislation, followed by alternative proteins. They were least interested in funding work on investment/divestment and farmers.



Most funders participating in our survey are interested in funding to benefit *all* farmed animals. After that, FAF members seem to prioritize helping **chickens and then fish**.

THANK YOU

to everyone who helped make this report possible, especially:



Stray Dog
INSTITUTE



and to all of the advocates working to fight factory farming

 **Farmed Animal Funders**





IX. Appendix



These are the questions we asked organizations in our survey. An asterisk (*) indicates that the question was required. We published a list of all of the survey questions, which we sent to survey participants along with the live survey in Qualtrics. Participants received three reminders to fill out the survey over the course of 2.5 months (June - August 2021).

Q1. What is the name of your organization?*

Q2. What is your organization's website URL?*

Note: if your organization doesn't have a website URL, please write N/A.

Q3. Does your organization work on issues other than farmed animal advocacy?*

Note: This is a yes / no question. If you answer yes, there will be two follow-up questions. The first will ask you to describe what other issues your organization works on, and the second will ask about the organization's budget as a whole.



Q4. What was your organization's total 2020 revenue in USD for work relevant to farmed animals?*

What was your organization's 2020 expenses in USD for work relevant to farmed animals?* *Note: if your organization re-grants to other organizations, please don't include the location or type of work of those grantees in any of the following estimates.*

Q5. In which location(s) did your organization have budget expenses for its work relevant to farmed animals? Budget expenses include compensation and programmatic expenditures. Please select all locations that apply.*

[Respondents had the option to select as many countries as they like from a dropdown]



Please use the sliders below to indicate the approximate portion of your 2020 expenses relevant to farmed animals that went to each location in which your organization had expenses.*

Note: you'll see a slider for each country that you indicated your organization works in. You can move the sliders to indicate how much work you do for farmed animals in each country. The sliders must total 100%. For example:

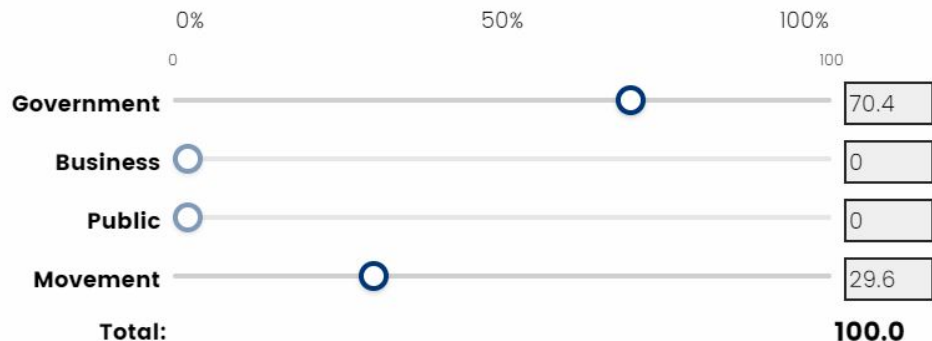




The following two questions regarding the types of work that your organization conducts will refer to [this table](#). Please consult [this table](#) before answering questions Q6 and Q7.

Q6. Please use the sliders below to indicate the approximate portion of your 2020 farmed animal relevant expenses that went to each sector of work.*

Note: you'll see a type of work in [this table](#). You can move the sliders to indicate how much work you do in that sector. The sliders must total 100%. For example:





Q7. Can you provide an approximate estimate of the portion of your 2020 farmed animal relevant expenses that went to each focus area of work?

Note: if you click “no,” you’ll go to a page that lets you indicate which focus areas in [this table](#) your organization is active in.

If you click “yes,” you’ll go to a page with sliders that lets you indicate how much work you do in each focus area in [this table](#). Your response to this, though optional, is important in helping FAF identify white spaces in the movement.





Q8. Can you provide an approximate estimate of what portion of your 2020 farmed animal relevant expenses went towards various animals in the food system?

Note: if you click "no," you'll go to a page that lets you indicate which animals you may do specific work on. If you click "yes," you'll go to a page with sliders that let you indicate how much work you do, roughly, to benefit each species of farmed animal. Your response is optional. The sliders must total 100%. The options include:

- All farmed animals
- Cows
- Pigs
- Other farmed mammals
- Egg laying chickens
- Broiler chickens
- Other farmed birds
- Farmed fish
- Wild-caught fish
- Farmed crustaceans
- Other farmed invertebrates



Q9. In your own words, please briefly describe your work relevant to farmed animals in any of the previously mentioned work sectors (i.e. Government, Business, Public, and Movement), focus areas of work, and/or work primarily on specific animals in the food system. Please feel free to provide any links.

Note: not to exceed 2,000 characters. This response is optional.

Q10. Are there any areas, geographically or programmatically, in which your organization isn't currently active, but has plans to expand to include in the future? Please feel free to provide any links.

Note: not to exceed 1,500 characters. This response is optional.

Q11. How would you briefly describe your organization's theory of change? As in, what is your organization working to achieve, and how do you see your work moving towards it? Please feel free to provide any links.

Note: not to exceed 1,500 characters. This response is optional.



Q12. What are three key goals for your organization in 2021?

Note: not to exceed 1,500 characters. This response is optional.

Q13. What are your organization's three biggest accomplishments?

Note: not to exceed 1,500 characters. This response is optional.

Q14. Is there anything else that you would like to briefly add?

Note: not to exceed 1,000 characters. This response is optional.

Q15. Please list a contact email:*

If you have any questions, please contact Kieran Greig at kieran@farmedanimalfunders.org.