Advocating Meat Reduction and Vegetarianism to Adults in the U.S.

Report in Brief

This report covers two phases of research representing a comprehensive study of meat consumption in the United States, with a focus on meat reducers and semi-vegetarians. It addresses in detail the behavior, motivations, and barriers of consumer segments that are of particular interest to vegetarian advocates. These results may help advocates more effectively persuade U.S. adults to reduce and eventually eliminate meat from their diets.

HRC Information

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Humane Research Council | PO Box 70180, Seattle, WA 98127-0179 | (206) 852-4848 | www.humaneresearch.org

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Table of Contents

List of Tables and Charts

TABLES

CHARTS

APPENDIX FILES

I. Study Background and Methodology

In early 2005, the Humane Research Council (HRC) formed a nonprofit research syndicate to study meat reduction and "semi-vegetarianism" among adults in the United States. This collaborative study involved several prominent animal advocacy groups and consisted of two primary phases of research. HRC used both quantitative (Phase One) and qualitative (Phase Two) research techniques to obtain a well-rounded understanding of the trends, motivations, and barriers to meat reduction, vegetarianism, and veganism in the U.S. This project represents one of the most comprehensive research studies ever conducted about the attitudes and behavior of U.S. adult consumers regarding meat consumption and reduction.

Phase One of the study involved the design, execution, and analysis of a quantitative survey of a large sample of U.S. adults age 18 and over. HRC worked with Survey Sampling, Inc. and its online research panel of more than 2.5 million U.S. adults to field the survey in February 2005. We employed "census balanced" sampling techniques to ensure, as much as possible, representation of the adult U.S. population. Online sampling based on a panel of participants (who have opted in) cannot be considered truly "random," although we sampled from one of the largest and most respected consumer panels available. Using online research methods also results in some limitations given that some groups are not fully represented online; this typically results in under-representation of non-white, lower-income, and elderly individuals. In total, more than 3,200 adults completed the Phase One survey. Assuming results are truly representative of U.S. adults, then the maximum margin of error for the entire sample is +/- 1.7% (higher for subgroups).

Following the initial quantitative research phase, HRC conducted a qualitative second phase, including nine in-person focus groups to further explore the survey findings. Focus groups were held in late 2005 in various cities around the United States, including Washington, D.C.; Minneapolis, MN; Houston, TX; Louisville, KY; and Portland, OR. Each focus group included 6-10 paid participants and lasted about 90-120 minutes per session (for all groups combined, there were a total of 73 focus group participants). All groups included participants who were screened according to their past, current, and future (intended) meat consumption behavior, with focus on actual meat reducers and semi-vegetarians. These focus groups were also supplemented with findings from a 2002 HRC study of four focus groups conducted in Seattle, including two groups of actual vegetarians and vegans (veg*ns).

The 2005 Phase Two focused on meat reducers (actual and intended) and semi-vegetarians to help fulfill the overall objectives of the study, including:

- Understand the geographic, demographic, and psychographic differences among meat consumers segmented by past, current, and intended future levels of meat consumption.
- *Qualitatively* increase the general understanding of semi-vegetarians, including current and intended eating behaviors, primary motivations and barriers to further meat reduction, and sources of influence, to support analysis of different approaches to vegetarian advocacy.
- *Quantitatively* validate and expand vegetarian advocates' understanding of semi-vegetarians and other meat consumption groups, including their current and future eating behaviors, motivations, barriers, and sources of influence.
- Begin to identify messages and approaches that effectively persuade current semi-vegetarians (and other meat consumer groups) to further reduce their meat consumption.

An important objective of this foundational research study was to segment current meat consumers according to their recent and intended behaviors. Using the detailed quantitative data from Phase One, HRC categorized meat consumption behavior into several key consumer segments based on respondents' self-reported changes in meat consumption from previous year and their intended changes over upcoming year. Please note that the survey defined the term "meat" comprehensively by asking respondents to provide answers regarding "any type of meat, including chicken, turkey, fish/shellfish, beef, pork, veal, or lamb." The resulting consumer segments serve as the underlying bases for the observations and conclusions provided in this report, and the groups are used to analyze and recommend strategies targeted at specific behaviors and motivations.

It is important to note that the findings presented in this report are subject to several caveats and limitations, most notably the reliance on self-reported data. Respondents' answers may differ from their actual opinions or behavior for a variety of reasons, particularly for questions involving predictions of the respondents' own changes in the future. Some participants may intentionally misrepresent their own behavior and opinions about an issue in an effort to please the researcher and/or avoid social stigma; others may do so inadvertently. For instance, a participant may actually intend to decrease their meat consumption for personal health reasons, but then say something else in a focus group to avoid the perception that they are currently unhealthy. This may also occur when asking research participants to describe their own motivations and barriers to change, including cases in which participants may not be aware of their own motivations.

Despite these limitations, however, self-reported intentions and predictions of change can provide a very useful starting point for advocates to evaluate the true intentions and potential changes for different respondent groups. Several of the key consumer segments identified in this report are based on respondents' intentions and/or willingness to reduce their meat consumption. These responses may not align perfectly with participants' true feelings or intentions, but these segments of consumers are nonetheless different from the rest of the adult population in ways that are meaningful to vegetarian advocates. The segmentation approach used throughout this study is helpful to identify groups of consumers who are relatively open to meat reduction and vegetarianism. Consumers who state that they intend to (or are willing to) reduce their meat consumption, for instance, arguably represent the target audiences that are most open to meat reduction and vegetarianism.

As mentioned previously, the participants involved in this research were all U.S.-based adults age 18 and over. While some of the findings are likely transferable to younger audiences, it is important to mention that this analysis and our conclusions may not apply to children and others under the age of 18. In fact, it is quite possible that the state of meat consumption is different for U.S. youths, including their past and future (intended) changes as well as the drivers of those changes. Future HRC research will include a parallel study of meat consumption among U.S. youth audiences to assess the key differences between youths and adults, and the implications for vegetarian advocacy. For the purpose of this report, references to "younger" groups or segments are references to young adults and not meant to include those under age 18.

Finally, please note that use of some terms in this report, such as "meat," "beef," and "seafood," is only for the sake of convenience and because these terms are commonly used by and familiar to non-vegetarian respondents. HRC understands the inherently misleading or even speciesist nature of such terms and we take care to avoid using them except when necessary to correctly describe the actual "language of the consumer," according to comments from research participants.

II. Summary of Key Findings

1. **This research examined the meat consumption habits of U.S. adults based on current, past, and future (intended) meat consumption behavior. The descriptions and sizes of these important consumer segments are summarized in the following table:**

	Percentage of Adults
Groups Based on Current Behavior	
Avid Meat Consumers	14%
Regular Meat Consumers	47%
Moderate Meat Consumers	25%
Semi-Vegetarians	13%
Vegetarians and Vegans	1%
Groups Based on Recent Changes	
Actual Meat Reducers	26%
Static Meat Consumers	62%
Actual Meat Increasers	9%
Groups Based on Intended Changes	
Intended Meat Reducers	18%
Continuing Meat Consumers	71%
Intended Meat Increasers	6%
Potential Semi-Vegetarians	24%
Potential Vegetarians	7%

2. **The vast majority of U.S. adults (72%) are "regular" or "moderate" meat consumers. The percentage of actual vegetarians is very low (1%), but the number of semi-vegetarians (13%) and actual meat reducers (26%) is also substantial (note that these groups overlap). Moreover, in each case the number of actual and intended meat *reducers* is about three times greater than the number of meat *increasers*.**

3. **Nearly one-fourth (24%) of the adult population say they are likely to reduce their meat consumption by half ("potential semi-vegetarians"), which is more than three times the number who are likely to eliminate meat entirely (7%).**

4. **The meat reducing (actual and intended) segments of the population are significant and driven primarily by the pursuit of a healthier diet, or by specific health issues. Actual veg*ns appear to be equally motivated by health concerns and farmed animal suffering.**

5. **Healthier eating is a primary goal among all segments of the U.S. adult population. Research participants most frequently mentioned that they strive to eat healthier by incorporating more fruits, vegetables, whole grains, and organic foods, and by reducing processed foods. However, perceptions of healthier eating also include consuming more chicken and seafood in lieu of red meat, and specifically including dairy in the diet for its perceived health benefits.**

6. **The principle *barriers* to meat reduction are a preference for the taste of meat and the perception that meat is essential for good health. Other barriers include social and cultural influences, cost, and some trepidation about trying meat alternatives.**

7. **Participants feel that academic, research, and other independent organizations provide the most unbiased information about proper food choices. There is some skepticism among the public with regard to any information or message sponsored by an organization, including the government, which may be perceived to have ulterior motives.**

8. **Several demographic variables appeared to relate to frequency of meat consumption, as described below:**

   - Females are the majority of all key meat reduction segments identified in this report.
   - Older people are less frequent consumers of meat than younger people for all levels of current meat consumption except the vegetarian group.
   - The South and Midwest regions of the U.S. include more frequent meat consumers compared with those living in the West and Northeast.

Percentage of each consumer segment according to the survey who are…	**ALL ADULTS**	**Veg*ns**	**Semi-Veg*ns**	**Actual Reducers**	**Intended Reducers**	**Potential Semi-Veg*ns**	**Potential Veg*ns**
Female	**54%**	63%	70%	61%	61%	66%	66%
Age 18 to 34	**36%**	53%	29%	26%	28%	38%	38%
Age 35 to 54	**37%**	28%	34%	38%	41%	39%	41%
Age 55+	**29%**	21%	35%	36%	31%	33%	21%
Willing to pay more for “humane” products	**41%**	63%	52%	51%	57%	56%	59%
Wanting a healthier diet than they have now	**77%**	66%	77%	83%	90%	88%	82%
Frequently/occasionally buying meat alternatives	**23%**	83%	43%	33%	36%	40%	58%
Frequently/occasionally buying dairy alternatives	**22%**	68%	34%	30%	35%	34%	52%

9. **The public perception of vegetarianism or veganism can affect one’s willingness to consider adopting these diets. Non-vegetarians seem to perceive the health motivation to be the more credible reason for vegetarian or semi-vegetarian behavior. Some non-vegetarians appear to associate most claims of farmed animal suffering with sensationalism, which can have negative implications for their acceptance of the message.**

10. **The majority of U.S. adults appear to be unfamiliar with meat and dairy alternatives, but many say that they would at least try these products if they were provided at no added cost or inconvenience. Actual experiences with alternatives have been very mixed.**

III. Conclusions and Recommendations

The Bottom Line

The vast majority of U.S. adults (~70%) show no inclination to reduce or eliminate meat from their diets, with taste and health reasons as their primary barriers. A smaller, but still significant, 20-25% of the population show some inclination to reduce meat consumption and are motivated primarily by health reasons. These people skew female and older and arguably represent the most attractive target audience (among adults) for vegetarian advocates. To be most effective, advocates should identify the current attitudes and behavior of their target audiences to persuade and assist them to make incremental, but sustained change toward a plant-based diet.

REPORT CONCLUSIONS

It should come as no surprise to most people that U.S. adults are frequent meat consumers. In the United States, meat consumption is ubiquitous, while actual vegetarians and vegans are too few in number to even measure accurately with public opinion surveys. Additionally, more than two-thirds of adult meat consumers show little to no interest in meat reduction, let alone veg*ism. In summary, this comprehensive HRC study shows that vegetarian and vegan advocacy in the U.S. is a difficult task facing significant challenges, including:

- The "critical mass" advocates sometimes speak of remains well out of reach—so far, only about 1% of adults currently say they are actual vegetarians or vegans[1].
- The vast majority of adults are resistant to the idea of vegetarianism and say it is unlikely they would ever adopt a vegetarian diet, let alone a *vegan* diet.
- Adults who show an interest in reducing or eliminating meat are motivated primarily by health reasons, a topic on which most veg*n advocates are perceived to have little credibility.
- Research findings suggest a more modest or incremental approach to advocacy would be more effective, but this may conflict with advocates' ideals, such as the pursuit of long-term goals (e.g., animal liberation) over short-term goals (such as meat reduction).

Despite these challenges, however, HRC believes there is strong potential for strategies that advocate meat reduction (rather than elimination), and that such an approach may end up producing more veg*ns. Note that HRC does not recommend dropping veg*n advocacy entirely, but instead appropriately targeting the level of behavior change to the perceived readiness of one's target audience. However, we do believe advocates must also recognize that, for most U.S. adults, this means initially advocating for something less than full veg*ism, however unappealing that may be for some advocates. For an adult audience, meat reduction is clearly more acceptable than complete veg*ism, and there is strong evidence that this approach to veg*n advocacy would persuade more people. Moreover, there is evidence that those who start to reduce their meat consumption become more open to both further reduction and possible elimination of meat from their diet.

[1] Other studies have shown slightly higher numbers of veg*ns; see http://www.vrg.org/nutshell/faq.htm#poll

There are several specific conclusions that lead us to believe the greatest opportunities are in advocating for reduction rather than elimination of meat, including:

- Most social marketing and other research studies show people are most likely to change their behaviors incrementally rather than making large, abrupt changes.
- A significant number of adults show some inclination to reduce their meat consumption, including up to 20-25% of the population, or about 45-55 million adults. This is about three times those who show any inclination to *eliminate* meat.
- The motivations that cause people to reduce their meat consumption are generally more diverse and multi-faceted than they are for those who eliminate meat. This presents more potential "trigger points" for advocates to use when promoting meat reduction.

Analyzing this study in light of these conclusions, HRC identifies several important implications for vegetarian and vegan advocates, as well as specific recommendations for future veg*n advocacy.

IMPLICATIONS FOR VEGETARIAN AND VEGAN ADVOCATES

The findings in this report include many important implications for veg*n advocates, the most significant of which address incremental advocacy, messaging and positioning, the health paradox, and social relationships. These issues will impact different advocacy organizations in various ways, depending on the groups' goals and target audiences, as well as the specific strategies and tactics that they use. However, each of these issues also has significant overarching implications for veg*n advocacy and the long-term adoption of veg*n diets.

INCREMENTAL ADVOCACY

Long-time animal advocate Henry Spira once said in an interview with *Satya Magazine* that "progress is made stepwise, incrementally." In no area of animal advocacy is this truer than for the advocacy of vegetarianism and farmed animals, particularly because meat consumption is so firmly entrenched in human society and habits. This incremental approach is also consistent with social science research showing that radical behavior change is a rarity, and that most people instead change slowly or incrementally. The challenge for veg*n advocates is to find ways to encourage people to make small changes relative to where they are now, and then to continue encouraging additional small changes over time. Currently, however, most approaches to veg*n advocacy appear to involve trying to persuade people to adopt vegetarian or vegan diets directly, without identifying interim steps to achieve that desired end goal.

One of the most important strategic decisions facing veg*n advocates is whether to emphasize meat reduction or the complete elimination of meat or other animal products. Veg*n advocates' goals are, arguably, best served by seeking out and pursuing approaches that most quickly and sustainably lower U.S. adult demand for meat products. The survey results strongly suggest a meat reduction strategy would be effective, although even with this comprehensive research, it is impossible to pinpoint any one most effective strategy. There are about three times as many people willing to reduce their meat consumption by half as those who are willing to become vegetarians. Assuming each group is equally likely to change, if there are 1,000 adults in the target audience, advocates might be able to persuade 240 of them to reduce their meat consumption by half (24% of adults are potential semi-vegetarians), but only about 70 of them to eliminate meat from their diets (7% are potential vegetarians). In this example, advocating semi-vegetarianism would yield the largest reduction in meat consumed.

In addition to curbing overall meat consumption, an incremental approach spurs more people to change their behavior in some meaningful way. This study and other research shows that getting people started on the path toward a desired change is itself a major breakthrough, and these people would then be significantly more susceptible to considering full vegetarianism. An incremental approach therefore has an important two-pronged effect: by itself it can result in a greater overall reduction in meat consumed, and it also creates a larger pool of people with significant potential for further change. Table 1 identifies some of the segments (and additional sub-segments) discussed in this report whom such a stepwise approach might persuade, including the potential size of each segment.

Table 1. Consumer Sub-Segments Based on *Potential* Changes

Definition of Sub-Segment	Percentage of U.S. Adults	Number of U.S. Adults
ALL U.S. ADULTS [2]	**100%**	**222 million**
All adults who are potential semi-vegetarians	24%	54 million
Actual meat reducers who are also intended meat reducers	17%	38 million
Regular meat consumers who are potential semi-vegetarians	9%	21 million
Moderate meat consumers who are potential semi-vegetarians	7%	16 million
All adults who are potential vegetarians	7%	16 million
Semi-vegetarians who are intended meat reducers	4%	10 million
Semi-vegetarians who are also potential vegetarians	3%	7 million
Moderate meat consumers who are potential vegetarians	2%	5 million
Regular meat consumers who are potential vegetarians	2%	4 million

For vegetarian and vegan advocates, these segments represent potential audiences who are significantly more likely to change their behaviors than the rest of the adult population. However, the definitions of these segments also underscore the much greater number of adults who may become semi-vegetarians and meat reducers rather than full vegetarians, at least on a self-reported basis. Again, the key is to first understand the current behavior, attitudes, and predispositions of their target audience, and then find a meaningful, but incremental step to encourage them to make.

MESSAGING AND POSITIONING

In our research with a range of meat consumers, HRC found within all potential audiences a consistent desire for carefully positioned messages. In addition to being generally resistant to change, most people strongly prefer to be presented with options rather than being told what to do, and some are very sensitive to what they feel is "preaching" from some diet advocates. Moreover, most U.S. adults specifically resist what they consider "extreme" diets, such as those that *include* large quantities of meat as well as diets that *exclude* meat entirely. Entreaties to eliminate meat or other animal products are alarming for many meat consumers and often not considered credible due to the widely perceived importance of eating a "balanced diet." The research data suggest a shift in language and tone to get past the first major barrier for most potential vegetarians, namely that such a diet seems unnecessarily extreme and personally unobtainable or unsustainable.

[2] US Census Bureau, Statistical Abstract of the United States, 2006.

Many motivations appear to influence a shift to vegetarian or vegan diets, though health-related issues topped the list for respondents in the Phase One survey. This suggests that vegetarian advocates must also be multifaceted in their approaches by using different messages with different audiences, and "layering" messages where appropriate. By "layering," we refer to using multiple messages, either in combination with each other or in sequence, to give the target audience multiple reasons to consider changing. Again, we do not suggest that any one approach is most effective, and it is essential for advocates to recognize that a single message will not work for all audiences. It is paramount that veg*n advocates target the right messages to the right audience.

THE HEALTH PARADOX

One particularly challenging issue for veg*n advocates is the use of the "health argument," historically a subject of some debate, to promote meat reduction and veg*ism. Advocating veganism or even vegetarianism based solely on health-related reasons may not be the most effective path, but health is clearly the biggest motive for *reducing* meat consumption. Following from HRC's suggestion that meat reduction has more potential for widespread adoption than complete veg*ism, it seems logical that vegetarian advocates should strive to incorporate more health arguments.

However, one issue with using health as a motivation is that many animal rights advocates are not likely to be considered credible sources of health information. One notable exception is the Physicians Committee for Responsible Medicine (PCRM); however even this health-oriented organization advocates purely veg*n diets and also concerns itself with issues of "compassion" for farmed animals. Effectively promoting meat reduction remains a significant challenge for veg*n advocates, and may necessitate partnering with health-related organizations and institutions to be credible.

Another issue facing veg*n and/or animal advocates who promote the health argument is the perception that a focus on health feels disingenuous or counter to the ideal of vegan advocacy. It may be difficult for some to see how advocating for meat reduction for human health serves the long-term goal of "animal liberation." However, behavior changes can sometimes precede attitudinal shifts, so by encouraging someone to reduce their meat consumption, even for health reasons, advocates can effect positive change, including opening people's minds to the concept of further meat reduction for other reasons, including compassion for farmed animals.

SOCIAL RELATIONSHIPS

This research clearly demonstrates the significance of one's friends and family as sources of dietary influence, including childhood experiences and current relationships. In particular, the food-related habits taught by parents are a major influence on their children's diets, and there is evidence that young people are more easily persuaded to change their diets than adults (although this research focused on adults). The general impressionability of children suggests that veg*n advocacy directed at youth audiences (and their parents) may be more effective than attempting to persuade adults directly. Additionally, the ongoing influence of one's family, friends, roommates, and significant others throughout adulthood has significant implications for veg*n advocates. Particularly as the cacophony of mainstream advertising and other marketing messages becomes ever more deafening, the relative impact of personal messages and recommendations is increasing. Simply put, people generally listen to their friends and family more than they listen to advertisers or other third parties, which underscores the importance of positive interactions and generating word-of-mouth.

RECOMMENDATIONS

The following HRC recommendations include high-level ideas and specific suggestions based on the two phases of research conducted for this study. They follow from the previous discussion about meat reduction as a potentially more effective strategy for promoting both semi-vegetarianism and eventually complete vegetarianism among adult audiences. Once again, not all of these recommendations will be suitable for all veg*n advocacy organizations, but they should provide useful ideas for anyone involved in promoting plant-based diets.

START SMALL TO BUILD CRITICAL MASS

Animal and veg*n advocates often talk about building "critical mass" or reaching a "tipping point" at which large numbers of people will begin to adopt vegetarian diets. While there may be some truth to such theoretical thresholds, this research shows that veg*n advocates still have a long road ahead of them. According to the Diffusions of Innovations theory[3] (also the innovation-adoption curve), "innovators" of any new idea typically represent about 2.5% of the population. However, current veg*ns represent only about 1% of the adult population, suggesting that veg*ism has yet to reach even the initial "innovation" stage of adoption. HRC's primary recommendation to veg*n advocates is to start on a small scale by identifying narrow segments of the population that are more predisposed toward meat reduction than others. We identified several such groups in the Phase One survey, some of which are shown in Table 1. Related HRC recommendations include:

- ❖ Focus advocacy on one narrow segment of the population and make every effort to understand their attitudes and behavior before choosing tactics and messages.
- ❖ Think creatively about unique types of consumers who may be more open to meat reduction or vegetarianism than other adults, such as people with a family history of diet-related illness.
- ❖ Avoid "mass advocacy" approaches that ignore the unique perceptions, motivations and barriers of different consumer segments. All types of meat consumers will be more responsive to tailored messages than to mass marketing.

CHOOSE THE RIGHT MESSAGE FOR THE RIGHT AUDIENCE

Perhaps the most challenging aspect of vegetarian and vegan advocacy is determining the most effective message or message(s) to use with a chosen target audience. Because most veg*n advocates themselves are vegan or vegetarian, it may be especially difficult for them to identify the most persuasive arguments for meat consumers. Marketing research such as HRC's Phase One survey and Phase Two focus groups can help advocates learn about their target audiences and test potential messages. In the end, there is no single best message for veg*n advocacy, and in fact most people will need to hear multiple reasons for reducing meat consumption before they will try it themselves. However, this does not mean that all arguments for veg*ism should be used in combination, and there is some evidence that people are overwhelmed when presented with all reasons at once. Instead, veg*n advocates should choose their messages strategically, including using health-based arguments to encourage initial meat reduction, and then follow up with animal suffering issues and other reasons to encourage complete veg*ism. Specifically:

- ❖ The **health argument** will likely be most effective when pursuing a meat reduction strategy, but perhaps not when advocating complete vegetarianism. There seems to be a limit on how much

[3] See http://en.wikipedia.org/wiki/Diffusion_of_innovations.

people will reduce meat consumption based on a health argument, and in the short term it is likely to result in more meat reducers and semi-vegetarians rather than more veg*ns.

- The **animal suffering argument** is likely to be more effective in persuading people to become complete veg*ns and remain that way, rather than reduce their meat consumption. However, because most people are so resistant to "radical" dietary change, this argument may be best targeted at current semi-vegetarians or current veg*ns to reinforce their decision. The animal argument seems less effective than the health argument for advocating meat reduction, and may have less long-term impact on lowering the demand for meat products.

- The **environmental argument** appears to be gaining traction in consumer awareness, but there is little evidence that it results in behavior change. People who are open to an environmental argument may be most responsive to meat reduction as a way to minimize their footprint, but this motive may not necessarily lead to complete veg*ism.

- In summary, HRC considers both health- and animal-related arguments important for advocating veg*ism. Leading with health has the greatest potential to encourage meat reduction, which in turn creates a pool of people who are more open to complete veg*ism to reduce animal suffering. However, the timing and targeting of these messages may be crucial to having an impact and are difficult for advocates to control with any precision. Moreover, different organizations may be most effective at different points, with some groups working to persuade people to reduce meat consumption for health reasons, and others moving people toward veg*ism based on animal concerns.

BECOME PERSONAL CHANGE AGENTS

As noted previously, personal relationships and influences are important for shaping dietary choices. Although such influences can work in both directions, they clearly represent an opportunity for veg*n advocates to better use existing social networks for more one-on-one persuasion. Using techniques such as viral marketing and word-of-mouth campaigns to get current veg*ns talking to their families and friends in positive and non-judgmental language, advocates may be able to multiply their efforts. This could involve seeking out current vegetarians and vegans and "training" them to effectively persuade meat eaters to limit or eliminate animal products without disrupting their personal relationships in the process. Similarly, veg*n advocates themselves should become more involved in community activities and social groups. By simply having an active presence in the community, veg*n advocates can break stereotypes and also position themselves to have meaningful one-on-one interactions with would-be meat reducers and potential vegetarians.

DON'T JUST PERSUADE PEOPLE, ENABLE THEM

Two issues that came up frequently in both the survey and the focus groups as barriers to meat reduction and vegetarianism were convenience and cost. Specifically, many people find meat alternatives too expensive, and some households with potential vegetarians say it would be too inconvenient to cook multiple meals. In general, these barriers suggest that veg*n advocates should shift slightly away from focusing on *why* people should reduce their meat consumption to put greater emphasis on *how* they can go about doing so. In particular, advocates should include "how-to" elements in all of their literature and other advocacy materials, with specific tools and resources to help people achieve the next logical step in personal meat reduction. Equally important, veg*n advocates should provide ongoing support of meat reducers and veg*ns to help them sustain those behaviors and keep them moving in the direction of complete veg*ism. Finally, advocates should also work to increase the demand for meat alternatives, which in turn should lead to greater availability and long-term price reductions as alternative producers improve their economies of scale.

IV. Meat Consumption and the U.S. Adult Diet

U.S. adults are frequent meat consumers, although there seems to be significant confusion or disagreement about the definition of "meat." About 1 in 8 adults can be considered "semi-vegetarian" and 1 in 4 have reduced meat consumption in the past year. Almost one-fifth of U.S. adults intend to reduce their meat consumption over the next year, and 1 in 4 say they are likely to eventually reduce their meat consumption by half.

The primary objective of this research study was to understand the role of meat in the U.S. adult diet and to identify recent and important trends in consumption of meat and related products. The research uncovered issues relevant to the attitudes and behaviors that surround meat consumption, including definitions of the term "meat" itself and how meat is perceived in the overall context of an individual's diet. During the course of the Phase Two focus groups, many participants showed confusion or disagreement concerning the **definition of "meat."** There was no single, commonly interpreted definition of the term among participants, and this seems to hold true for the general adult population. When asked about personal consumption habits, participants interpreted the term "meat" in various ways, including or excluding certain types of animal flesh. Therefore, it was typical to hear an individual state that she or he is "cutting back on meat and replacing it with more fish and chicken," or that the individual "does not eat meat, but seafood only."

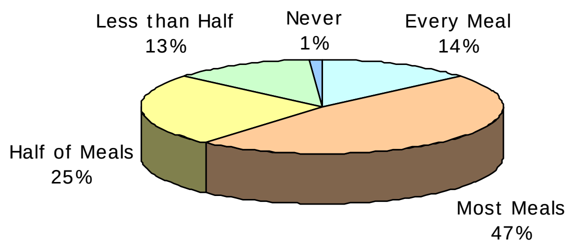
Although many research participants did correctly interpret "meat" to include the flesh of all animals, it was probably not the majority (this was not addressed in the Phase One survey and is therefore cannot be described quantitatively). To correct for this misinterpretation and obtain accurate feedback, focus group participants and survey respondents were provided an explicit and comprehensive definition of meat including all types of animal flesh. Focus group participants were verbally given the definition after collecting their "unaided" responses (without the moderator defining the term for them) regarding how they interpret the term "meat." The Phase One survey clearly defined the term by specifying "any type of meat, including chicken, turkey, fish/shellfish, beef, pork, veal, or lamb." By using this fairly comprehensive definition, we can be more confident that the research captured accurate responses about participants' attitudes and behavior regarding meat consumption.

CURRENT MEAT CONSUMPTION AND AVOIDANCE

The Phase One research indicated that, on a self-reported basis, U.S. adults are frequent meat consumers. This finding is consistent with our general knowledge of U.S. diets and reflects per capita consumption data available from the U.S. Department of Agriculture[4]. Specifically, 62% of Phase One survey respondents said they currently consume meat either with "every" meal (14%) or with "most" meals (47%); these we term "avid" and "regular" meat consumers, respectively. By comparison, one in four U.S. adults (25%) is a "moderate" consumer who currently consumes meat with "about half" of their meals. Roughly one in eight adults (13%) is a "semi-vegetarian," who we define as currently eating meat with fewer than half of their meals. Finally, only about 1 adult in 100 (1%) is currently a self-reported veg*n who "never" consumes meat. The high level of current meat consumption among U.S. adults represents both a significant challenge and an opportunity for veg*n advocates.

[4] For U.S. Department of Agriculture data, see http://www.ers.usda.gov/data/foodconsumption/

Chart 1. Frequency of Meat Consumption, by Number of Meals



Based on the Phase One survey results, and consistent with both USDA figures and anecdotal evidence, it is clear that chicken and "red meat" are the most frequently consumed types of meat among all consumer segments. Almost all respondents (99%) said that they consume chicken, including about 20% who said that they consume chicken 4-6 days per week and 62% who consume chicken 1 to 3 days per week. By comparison, 94% of respondents eat red meat (defined as beef, veal, or lamb), including 21% who consume it 4-6 days per week and 49% who eat it 1-3 days per week. On the other hand, respondents said that they consume pork, turkey, and "seafood" (fish or shellfish) significantly less frequently. Although 87% of respondents said they consume seafood at some level, consumers include seafood in their diets much less often than other types of meat. Only 4% of adults eat seafood 4-6 days per week or more frequently, while 31% consume seafood 1 to 3 days per week (and another 51% noted their seafood consumption to be 1 to 2 times per month).

MEAT CONSUMPTION AND AVOIDANCE TRENDS

The Phase One survey also asked about respondents' recent trends and future intentions regarding meat consumption. All survey respondents were asked to estimate whether their meat consumption had increased, decreased, or stayed the same during the past year. The majority of U.S. adults (63%) say they have kept their meat consumption static **over the past year**. About one fourth of adults (26%), however, say they now eat less meat compared with one year ago, which is nearly three times the number of adults who say they are now eating more meat (9%). Respondents were also asked to predict changes in their personal levels of meat consumption over the next year. Again, the majority of respondents (72%) say they intend to maintain their current level of meat consumption over the next year. Among those who intend to change their meat consumption, however, meat reducers (18% of total population) outnumber increasers (5%) by more than three to one.

Survey respondents were also asked about the likeliness that they would ever reduce their meat consumption by half or eliminate meat from their diet entirely. The majority of respondents in each case say that they are unlikely to reduce or eliminate meat (71% and 91%, respectively). However, a substantial one-fourth of U.S. adults (24%) say they are very or somewhat likely to reduce their meat consumption by half (we call these people "potential semi-vegetarians"). By comparison, a much smaller percentage (7%) of respondents say they are very or somewhat likely to eliminate meat from their diets entirely ("potential vegetarians"). Although they represent minorities of adults in both cases, these two groups are significant potential target audiences for vegetarian advocates given their predisposition toward reducing or eliminating meat. Translated into numbers of U.S. adults, potential semi-vegetarians are a group of more than 50 million people, and potential vegetarians represent nearly 15 million people.

CLASSIFICATION OF KEY MEAT CONSUMER GROUPS

A principal objective of the Phase One study was to measure and categorize current meat consumption groups across the broad U.S. adult population base. This consumer segmentation was necessary to understand the demographics, attitudes, and behavior associated with each level of meat consumption, to help identify effective strategies for reducing consumption. This segmentation technique is widely used in both for-profit and nonprofit sectors to analyze a potential audience and to group people into meaningful categories. For our purposes, and using the Phase One survey data, respondents were segmented into several key consumer groups based on their past, current, and future (intended) meat consumption behavior. See Table 2 for a definition of each key consumer segment and the proportion of U.S. adults that each segment currently represents.

Please note that these consumer segments are mutually exclusive within each timeframe (e.g., no overlap between current "avid" and "regular" meat consumers), but there may be significant overlap between different timeframes (i.e., current, past, future). For example, current "moderate" meat consumers may overlap with "actual reducers" (past behavior) or "potential vegetarians" (future/intended behavior). For the remainder of this report, we will go into detail on each group, focusing on what vegetarian advocates might consider the most persuadable target audiences. These include the segments of people who already exhibit some changes in their consumption behavior and/or show interest in reducing or eliminating meat from their diets. Our focus in this report is therefore on actual and intended meat reducers, actual and potential semi-vegetarians, and potential vegetarians.

Table 2. Definitions of Key Consumer Segments

Consumer Segment	Percentage of Adults	Definition of Group *
Segments Based on Current Behavior:		
Avid Meat Consumers	**14%**	Currently consume meat with "every" meal
Regular Meat Consumers	**47%**	Currently consume meat with "most" meals
Moderate Meat Consumers	**25%**	Currently consume meat with "about half" of meals
Semi-Vegetarians	**13%**	Currently consume meat with "fewer than half" of meals
Vegetarians and Vegans	**1%**	Currently say they "never" consume meat
Segments Based on Recent Behavior:		
Actual Meat Increasers	**9%**	Increased meat consumption vs. previous year
Static Meat Consumers	**62%**	No change in meat consumption vs. previous year
Actual Meat Reducers	**26%**	Reduced meat consumption vs. previous year
Segments Based on Future Intended Behavior:		
Intended Meat Increasers	**6%**	Intend to increase meat consumption over next year
Continuing Meat Consumers	**71%**	Intend to maintain meat consumption over next year
Intended Meat Reducers	**18%**	Intend to reduce meat consumption over next year
Potential Semi-Vegetarians	**24%**	Are "likely" to reduce meat consumption by half eventually
Potential Vegetarians	**7%**	Are "likely" to eliminate meat consumption eventually

* The survey defined the term "meat" comprehensively by asking respondents about "any type of meat, including chicken, turkey, fish/shellfish, beef, pork, veal, or lamb."

V. Profiles of Key Consumer Segments

As described previously, we have segmented U.S. adults into key consumer groups, including: Vegans/Vegetarians; Semi-Vegetarians; Actual/Intended Meat Reducers; and Potential Semi-Vegetarians/Vegetarians. In this section we provide a brief snapshot of the key characteristics of each segment primarily using data from the Phase One survey.

Using profiling questions and qualitative research such as focus groups, combined with the segmentation techniques described earlier, this study offers a deeper understanding of these consumer segments. By identifying who these people are, veg*n advocates can better understand them and determine what messages and tactics will most effectively persuade them to further reduce their meat consumption. HRC closely analyzed Phase One survey responses, which included a series of demographic and psychographic (psychological profiling) questions. HRC also conducted focus groups with vegetarians, semi-vegetarians, and actual meat reducers to supplement the quantitative findings and create in-depth profiles for each of these consumer segments. This research should provide advocates with a good starting point for effective vegetarian or vegan outreach to these groups.

KEY DIFFERENCES BETWEEN SEGMENTS

Veg*n advocates may find it helpful to examine the frequency of meat consumption with respect to survey respondents' demographics. Several demographic variables were examined as they relate to current levels of meat consumption—geography, age, gender, level of education, marital status, household income, animal guardianship, and level of employment. The factors most significantly related to frequency of meat consumption appear to be gender and age. There were, however, also weaker relationships with other variables, including geography, ethnicity, employment status, and animal guardianship, as summarized below. Smaller correlations between education, marital status, or income and meat consumption exist for some segments, and will be covered later in the report.

GENDER: Men are more likely than women to say that they consume meat with most or all of their meals. Males constitute more than half of survey respondents classified as "avid" meat consumers (56%) and of the intended meat increasers group (58%). Conversely, women make up significantly larger portions of the "moderate," semi-vegetarian and vegetarian consumer segments. Females represent 70% of semi-vegetarian respondents, and 63% of vegetarian or vegan respondents. Similarly, women constitute two-thirds (66%) of both the potential vegetarian and potential semi-vegetarian groups, and 61% of the intended meat reducer group. Note that the overall survey sample skews slightly female, 54% versus 46% male.

AGE: Interestingly, frequency of meat consumption declines among older consumers, and younger respondents are more likely to be members of the avid, regular, or moderate meat consumer groups. Older respondents, on the other hand, are more likely to be moderate than regular or avid meat consumers, and are more frequently identified as semi-vegetarians. Potential semi-vegetarians and potential vegetarians are indistinguishable from the rest of the population and from each other, but intended meat reducers also skew older. Although older age groups tend to consume less meat, this trend does not carry over to include complete elimination of meat from the diet. The percentage of vegetarians seems to remain relatively constant across all demographic criteria, and there is some indication that actual vegetarians may skew younger (though the sample size is too small to draw any meaningful conclusions about age).

GEOGRAPHY: The regional differences between meat consumption patterns identified in the Phase One survey show more frequent meat consumers in the Southern and Midwestern regions of the U.S. versus the Western and the Northeastern regions. Avid and regular meat consumers constitute 65% (combined) of those polled in the South and Midwest, compared with the 55% and 57% who answer similarly in the West and Northeast, respectively. Consequently, the proportion of semi-vegetarians is much lower in the Midwest and South compared with other regions, although the variation is not as significant. Similarly, potential semi-vegetarians and, especially, potential vegetarians are also more likely to be located in the West or Northeast. Interestingly, however, the proportion of actual and intended meat reducers in each region is comparable to the population as a whole. This suggests that those in the South and Midwest may consume more meat, but they are equally as likely as people in other regions to be actively *reducing* how much meat they consume.

ETHNICITY: The Phase One research also examined ethnic background, even though the sample skews very heavily toward white respondents. The non-white groups were further broken down into specific ethnicities, including Black, Indian, and Hispanic, etc., but the response base for each individual ethnic segment was too small to allow for meaningful observations. These ethnicities have been combined into a single group for analysis. The response base, therefore, includes mostly whites (74%), some non-whites (16%), and some undisclosed ethnicities (10%). Taken as a single minority cluster, non-white consumers are significantly more likely to be avid meat consumers and less likely to be moderate consumers than are whites, per Table 3. Upon closer examination of the data, it appears that African Americans are most likely to be "avid" meat consumers.

Table 3. Ethnic Differences by Consumer Segment

Ethnicity *	ALL ADULTS	Consumer Segments				
		Avid	Regular	Moderate	Semi-Vegetarian	Veg*n
Non-White	18%	27%	17%	13%	16%	30%
White	82%	73%	83%	87%	84%	70%

*** Excludes respondents who did not answer this question, 10% of all survey respondents.**

EMPLOYMENT STATUS: Meat consumption seems to increase with level of employment; see Table 4 for details. For instance, full-time employees make up more than half (57%) of avid meat consumers, but only 38% of semi-vegetarians. The inverse is true with respect to people who are currently unemployed; these people constitute only 29% of avid meat consumers, but 44% of semi-vegetarians. This could be due to the direct relationship of employment status and income. Nearly one-third (29%) of all adults surveyed stated that cost was a factor in their decision to consume less meat. These employment-related observations, however, did not carry over into the veg*n segment. More than half of veg*ns (53%) are employed full-time.

Table 4. Employment Differences by Consumer Segment

Employment Status	ALL ADULTS	Consumer Segments				
		Avid	Regular	Moderate	Semi-Vegetarian	Veg*n
Full-time	49%	57%	51%	45%	38%	49%
Part-time	36%	14%	14%	15%	19%	15%
Not Employed	15%	29%	35%	40%	43%	36%

ANIMAL GUARDIANSHIP: The Phase One research also addressed the potential relationship between meat consumption and the ownership or guardianship of companion animals. Interestingly—perhaps even surprisingly—there is no significant relationship between these two variables. In other words, those with companion animals do not consume meat with measurably different frequency than those who do not have companion animals. This may be significant because other research has shown a strong relationship between having companion animals and supporting animal protection in general. From these findings, however, it seems clear that this relationship does not extend to one's meat consumption or choice to be veg*n. This suggests that U.S. adults generally do not think of meat consumption as an animal protection issue.

CURRENT VEGETARIANS AND VEGANS

Profile in Brief: Drawing primarily from the Phase One survey, vegetarians and vegans (veg*ns) combined represent a very small percent of U.S. adults and distinguish themselves in several ways from meat eaters. Veg*ns appear more likely than other consumer segments to be both younger and female, with more education but typically lower household incomes. They are also somewhat more adventurous than other consumers, including frequently trying new grocery products and buying meat and dairy alternatives. Veg*ns are also more concerned with animal rights and are more willing to pay for access to humane foods.

The Phase One survey included respondents who say they "never" eat any type of meat, including both vegetarians and vegans. These respondents were not asked questions specific to meat consumption, but they were presented with a separate and unique set of questions addressing various factors about vegetarianism. Overall, only about 1% (N=40 of Phase One respondents) of the U.S. adult population currently reports maintaining such a diet. Moreover, the survey yielded only six self-described vegans, representing 15% of vegetarian respondents and a negligible 0.2% of the total sample. Clearly, these actual or "true" veg*ns continue to be a very small segment of the U.S. adult population. Due to the small numbers of respondents, for analysis purposes we combine vegetarians and vegans into a single segment of consumers. Note that the margin of error for questions of this segment is quite high (up to +/-16%, assuming a representative sample), and significant care should be taken when using these data. However, these results were also supplemented with additional findings from the Phase Two focus groups, and together they provide a high-level profile of veg*ns.

Table 5. Select Data for Vegetarians/Vegans vs. All U.S. Adults

All Adults	Percentage of Vegetarians/Vegans Who…	
54%	63%	Are female
36%	53%	Are age 18 to 34 years old
37%	63%	Have a college degree or more education
70%	88%	Frequently or occasionally try new grocery products
44%	55%	Say they tend to be first among their friends to try new things
58%	46%	Are more concerned about human rights than animal rights
62%	78%	Frequently or occasionally volunteer time for a good cause
41%	63%	Are willing to pay more for humanely raised animal products
23%	83%	Frequently or occasionally purchase meat alternatives
22%	68%	Frequently or occasionally purchase dairy alternatives

DEMOGRAPHICS: As shown in Table 5, veg*ns tend to skew somewhat female and younger when compared with the total adult population. Females constitute the **gender** for nearly two-thirds (63%) of the veg*n group. While 36% of the total adult sample is 18-34, 53% of veg*n adults are in this younger **age** range. Interestingly, while veg*ns are likely to be **more educated** than non-vegetarians (63% with college degrees or more education versus 37%), they are also likely to have *lower* **household incomes**. About one in ten veg*ns (11%) have household incomes of $100,000 or more, compared with 15% of the total adult population.

PSYCHOLOGY: Vegetarian and vegan respondents appear to be most sympathetic toward **animal and environmental causes**. When asked if they agree that **human rights** are of more concern than animal rights, veg*ns are the least likely of all consumer segments to agree with the statement (46% of veg*ns agree, compared with 58% of all adults). Additionally, vegetarians and vegans are more willing than any other group to agree that they would pay higher prices for **"humanely raised" animal products**. Nearly two-thirds (63%) of veg*ns agreed that they would be willing to pay more, compared with a much smaller 41% of all adults. More than half (55%) of veg*n consumers agree with the statement, "I tend to be first among my friends to **try new things**," compared with 44% of non-vegetarian consumers. This suggests that veg*ns are more likely to be "thought leaders" and is consistent with their status as "innovators" of more humane diets.

BEHAVIOR: According to the survey results, nearly two-thirds (63%) of actual vegetarians currently consume **eggs**, while about 38% do not, although the question did not ask about the use of eggs as ingredients in baked or other food products. More than eight in ten vegetarian respondents (82%) currently consume **dairy products** (including milk, cheese, and butter), while 18% say they "never" consume dairy products. A plurality of vegetarian respondents (43%) consumes dairy products "every day," while another 23% of vegetarians estimate dairy consumption at 4 to 6 days per week. Veg*ns are the most likely consumer segment to try new grocery products and to purchase meat and dairy alternatives. Nearly nine in ten veg*ns (88%) frequently or occasionally try **new grocery products** compared with the 70% of all adults who try new products. More than eight in ten veg*ns (83%) frequently or occasionally purchase **meat alternatives** (versus 23% for all adults); 68% of veg*ns say they frequently or occasionally purchase **dairy alternatives** (versus 22%).

IDENTIFICATION: Of the 40 actual vegetarians and vegans who responded to the Phase One survey, 80% described themselves as vegetarian, 5% did not, 10% said they were unsure, and another 5% wrote in some other response. While there were only six actual vegans, ten respondents said they would ***describe* themselves as vegan**. It is interesting that vegetarians seem to be somewhat hesitant or unsure about describing themselves as such, but that more people said they were vegan than were actually vegan. This may be due, at least in part, to the general confusion that people seem to have with the definitions of "vegetarian," "vegan," and "meat." From the focus group discussions, researchers found that vegetarian participants seem the most familiar with the vegan diet and lifestyle, which is not surprising. It may also suggest that veganism is perceived positively by current vegetarians, who exhibit some desire to associate themselves with the more restrictive diet. However, the veg*n segment is too small to draw any solid conclusions.

CURRENT SEMI-VEGETARIANS

Profile in Brief: Semi-vegetarians are those who currently eat meat with fewer than half of their meals; about one in eight U.S. adults is a semi-vegetarian. Like their vegetarian counterparts, semi-vegetarians are more likely to be female than male, but they tend to skew *older* rather than younger. In fact, more than one third of current semi-vegetarians are age 55 or older. Many semi-vegetarians are also regular purchasers of both meat and dairy alternatives, and most are willing to pay more for "humane" meat products. Most semi-vegetarians also report having reduced their meat consumption in the past year and show an interest in further meat reduction over the coming year.

For the purpose of this report, "semi-vegetarians" are meat consumers who say that they currently eat meat with fewer than half of their meals, representing 13% of U.S. adults. Although they are a small segment, semi-vegetarians are an important target audience for vegetarian advocates for several reasons. Most importantly, they are much more likely than most adults to continue reducing their meat consumption or to eliminate meat entirely at some point in the future. Also, because they have already acted on a preference for consuming less meat, semi-vegetarians can help advocates understand the change process. Semi-vegetarians differ from the overall population in several important ways.

Table 6. Select Data for Semi-Vegetarians vs. All U.S. Adults

All Adults	Percentage of Semi-Vegetarians Who…	
54%	70%	Are female
26%	35%	Are age 55 and older
27%	54%	Eat less meat now compared with one year ago
18%	33%	Intend to eat less meat one year from now
24%	49%	Say it is somewhat/very likely they would reduce meat by half
7%	23%	Say it is somewhat/very likely they would give up eating meat
48%	61%	Agree people should live simpler lives with fewer possessions
41%	52%	Are willing to pay more for humanely raised animal products
23%	43%	Frequently or occasionally purchase meat alternatives
22%	34%	Frequently or occasionally purchase dairy alternatives

DEMOGRAPHICS: Semi-vegetarians differ demographically from other current meat consumers. Similar to veg*ns, semi-vegetarians are predominantly female (70%, representing the highest **gender** disparity for any of the consumer groups analyzed). Unlike veg*ns regarding **age**, semi-vegetarians skew older than the total adult population. More than one third of semi-vegetarians (35%) are 55 or older, while only 26% of all U.S. adults are over age 55. Interestingly, the semi-vegetarian group is the least **employed** of any consumer segment we studied; 44% of semi-vegetarians are currently unemployed versus 36% of all adults. This may be related to age, however, because the survey did not distinguish being "unemployed" from retirement. Finally, semi-vegetarians appear more likely to live in the Western U.S., but this difference is slight (27% versus 22% of all adults).

PSYCHOLOGY: Semi-vegetarians seem to hold somewhat more "progressive" attitudes than regular or moderate meat consumers, including willingness to pay for **humanely raised animal products**. Semi-vegetarians are also more likely to agree that people should "live more simply, with **fewer possessions**" and that "**nature is sacred**" compared with other meat consumer segments. These are characteristics that align with the segment's gender differential, as evidenced by both the Phase One survey responses and the Phase Two focus groups. Female semi-vegetarian focus group participants showed greater concern for animals, the environment, and generally living with a small footprint, compared with more frequent meat consumers.

BEHAVIOR: Many semi-vegetarians report significant dietary changes over the previous year, including significant **reductions in their meat consumption**. Only 40% of semi-vegetarians maintained the same level of meat consumption over the last year, compared with 63% for all adults. A majority of semi-vegetarians (54%) now consume less meat than one year ago, including 23% who indicate that the decrease has been "significant." Semi-vegetarians are also more likely to purchase **meat and milk alternatives** than any other meat consumer group (excluding veg*ns). Nearly half of semi-vegetarians (43%) frequently or occasionally purchase meat alternatives compared with 23% for the overall adult population. About one third of semi-vegetarians (34%) frequently or occasionally purchase milk alternatives, compared with 22% for all adults.

INTENTIONS: One third of semi-vegetarians (33%) say they **intend to be eating less meat** a year from now, including 16% planning to eat "somewhat" less meat and 17% planning to eat "significantly" less meat. This is nearly **twice the proportion** of all U.S. adults who intend to eat less meat, indicating that semi-vegetarians represent a significant potential opportunity for encouraging further meat reduction. About half of semi-vegetarians (49%) say they are at least somewhat likely to **reduce their meat consumption by half**. Again, this is twice the number of all adults who say the same thing. Significantly different from the population as a whole, one-fourth of semi-vegetarians (23%) say they are somewhat or very likely to **completely eliminate meat** from their diet, compared with only 7% of all U.S. adults who say the same thing.

ACTUAL AND INTENDED MEAT REDUCERS

Profile in Brief: The segments of actual and intended meat reducers have similar profiles and, indeed, they overlap to a significant extent. They represent between one in four and one in five adults in the U.S. Like veg*ns and semi-vegetarians, both segments skew significantly female and somewhat older relative to all U.S. adults. They also seem to have greater sympathy for animal and environmental causes and show more willingness to pay for "humanely raised" animal products. Both groups are also more frequent purchasers of meat and milk alternatives compared with the overall adult population.

In addition to studying current meat consumption, the Phase One survey data was segmented according to respondents' past (actual) and future (intended) changes in meat consumption. Respondents were asked if they are now eating more, less, or the same amount of meat compared with the *previous* year, and were also asked about their intentions over the *next* year. Overall, nearly two-thirds (63%) of meat eaters are "static consumers," who are eating about the same amount of meat as one year ago. Nearly three-fourths (72%) of the population intend to eat the same amount of meat over the next year. About one-fourth of the total adult population (26%) reduced their meat consumption over the past year, while intended meat reducers make up about one-fifth (18%) of all U.S. adults. HRC focuses on these segments because they represent key audiences for veg*n advocates given that they self-report an actual change or the intention to change (note that actual behavior is usually a better indicator of one's true intentions than statements about the future).

Table 7. Select Data for Actual / Intended Meat Reducers vs. All U.S. Adults

All Adults	Percentage of Actual or Intended Meat Reducers Who…		
	Actual	Intended	
54%	61%	61%	Are female
43%	57%	53%	Are age 45 and older
27%	100%	63%	Eat less meat now compared with one year ago
18%	42%	100%	Intend to eat less meat one year from now
24%	46%	64%	Say it is somewhat/very likely they would reduce meat by half
7%	12%	19%	Say it is somewhat/very likely they would give up eating meat
33%	39%	51%	Strongly agree that they would like to eat a healthier diet
41%	51%	57%	Are willing to pay more for humanely raised animal products
23%	33%	36%	Frequently or occasionally purchase meat alternatives
22%	30%	35%	Frequently or occasionally purchase dairy alternatives

DEMOGRAPHICS: The survey data show that the percentage of actual and intended meat reducers increases as **age** increases, meaning that older people tend to be more active in reducing their meat consumption. Specifically, those 45 and older make up 43% of the total population, but they represent over half of actual (57%) and intended (53%) meat reducers. Additionally, adults under age 35 are less likely to reduce their meat consumption than older people; only 28% of intended meat reducers are under 35, compared with more than a third (36%) of all U.S. adults. Regarding **gender**, 61% of both actual and intended meat reducers are female, versus 39% who are male. On a **regional** basis, although the difference is not significant, it appears that respondents living in the West are more likely to be actual meat reducers. Finally, with respect to **employment status**, actual meat reducers appear more likely to be unemployed or to have part-time positions compared with the total population. More than four in ten actual meat reducers (42%) are unemployed versus 36% of all U.S. adults.

PSYCHOLOGY: Similar to the other segments of most interest to vegetarian advocates, both actual and intended meat reducer segments appear to be more sympathetic to animal and environmental causes compared with static meat consumers and meat increasers. Their responses show that they are more willing to pay more for **humanely-raised animal products**, they hold a strong belief in the **sanctity of nature**, and they are more likely than others to agree that people should live with **fewer possessions**. On all other philosophical or psychological issues addressed in the survey, the responses from actual and intended meat reducers closely resemble that of the overall adult U.S. population.

BEHAVIOR: The segments of actual and intended meat reducers are not mutually exclusive, and in fact they overlap significantly. Nearly two-thirds of intended meat reducers (63%) also report having reduced their meat consumption **over the past year**. In addition, 42% of those who actually reduced their meat consumption over the past year say they intend to further reduce it **over the next year**. As with the other segments studied so far, actual and intended meat reducers are both more likely than other adults to say they **purchase meat and milk alternatives**. About one third of actual/intended meat reducers (33-36%) frequently or occasionally buy meat alternatives, compared with 23% for adults overall. Roughly one third of actual and intended reducers (30-35%) buy milk alternatives with similar frequency, versus 22% of all adults.

MOTIVATIONS: Actual and intended meat reducers were asked specifically why they reduced (or intend to reduce) their meat consumption. In both cases, **health issues** dominated the responses, and “health in general” was the number one reason for both segments. Related motivations for meat reducers include concerns about consuming too much **fat and cholesterol** as well as a desire to **lose weight**, both of which also frequently came up in the focus group discussions. Concerns about the cost of meat and a desire to eat **less expensive foods** also surfaced in the focus groups. Concern for animal suffering was mentioned by only a small minority of survey respondents, although it is more of a motivation for intended than for actual meat reducers. For a more complete discussion of motivations for reducing or eliminating meat, please refer to Section VI.

POTENTIAL SEMI-VEGETARIANS AND POTENTIAL VEGETARIANS

Profile in Brief: Potential semi-vegetarians represent a significant 24% of U.S. adults; however, potential vegetarians are a much smaller 7% of adults (the two groups overlap significantly). Similar to other segments of interest already profiled, potential semi-vegetarians/vegetarians skew significantly female. Both groups are more likely to say they will reduce their meat consumption in the next year and are frequent purchasers of meat and milk alternatives, as compared with other consumers. Both segments are also more likely to say they are “first among their friends to try new things.” This suggests that these segments may be diet “innovators,” at least on a self-reported basis.

Two additional segments of particular interest include those who answer that it is likely that they would ever reduce their meat consumption or eliminate meat from their diet entirely. We asked both questions and label the segments “potential semi-vegetarians” and “potential vegetarians,” respectively. Once again, these groups represent minorities of the total U.S. population, which presents both a challenge and an opportunity for vegetarian advocates. A substantial one in four U.S. adults (24%) are potential semi-vegetarians who say they are “very/somewhat likely to ever reduce their meat consumption by half.” Only 7% of respondents said, however, that they would be “very/somewhat likely to ever eliminate meat from their diet entirely.” This clearly suggests that advocates would have an easier time convincing people to reduce rather than eliminate meat (although in both cases a strong majority of adults say they are unlikely to *ever* make such changes to their diets). In both questions, only a very small percentage of respondents said they were “not sure” (2-4%).

Chart 2. Likeliness of Halving or Eliminating Meat from Diet

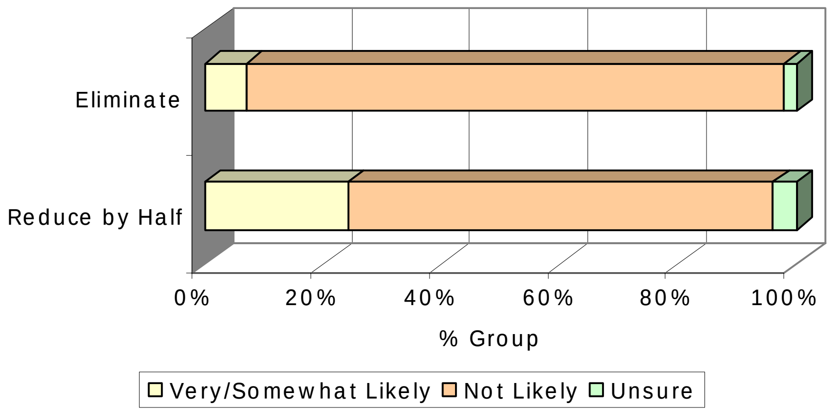


Table 8. Select Data for Potential Semi-Vegetarians / Vegetarians vs. All U.S. Adults

All Adults	Percentage of Potential Semi-Vegetarians or Potential Vegetarians Who…		
	Potential Semi-Veg	Potential Veg	
54%	66%	66%	Are female
27%	49%	44%	Eat less meat now compared with one year ago
18%	45%	46%	Intend to eat less meat one year from now
24%	100%	82%	Say it is somewhat/very likely they would reduce meat by half
7%	25%	100%	Say it is somewhat/very likely they would give up eating meat
33%	49%	49%	Strongly agree that they would like to eat a healthier diet
41%	56%	59%	Are willing to pay more for humanely raised animal products
23%	40%	58%	Frequently or occasionally purchase meat alternatives
22%	34%	52%	Frequently or occasionally purchase dairy alternatives
48%	62%	62%	Agree people should live simpler lives with fewer possessions
44%	53%	58%	Say they tend to be first among their friends to try new things

DEMOGRAPHICS: Similar to the other meat reducing groups that we have examined, potential semi-vegetarians and vegetarians skew significantly **female**; two thirds (66%) of each segment are women. But there is no apparent relationship with **age**, and potential semi-vegetarians/vegetarians both have age profiles very similar to the overall U.S. adult population. This is interesting especially because *actual* semi-vegetarians skew older. It suggests that although older people are most likely to eat limited amounts of meat, the potential for further meat reduction is proportional for people of all ages. There is also some evidence that potential vegetarians have lower household incomes compared with other adults. Almost two-fifths of potential vegetarians (38%) have household incomes less than $30,000, compared with 30% of all adults.

PSYCHOLOGY: Interestingly, both groups—potential semi-vegetarians and potential vegetarians—are more likely than other adults to *disagree* with the statement that they are **"more concerned with human rights than animal rights."** About one fifth of potential semi-vegetarians/vegetarians (18-20%) disagree with this statement, compared with only 13% of all adults. These segments are also much more likely than most other adults to agree that they want to eat a **healthier diet** and that they are willing to pay more for humanely raised animal products. Potential semi-vegetarians and vegetarians are also more likely to say that they think people should live **simpler lives**. Finally, they are much more likely to agree that they are "first among their friends to **try new things**," suggesting that these people may be more adventurous and/or influential than other adults.

BEHAVIOR: Perhaps not surprisingly, potential semi-vegetarians and potential vegetarians are much more likely to be both actual and intended meat reducers. Half (49%) of potential semi-vegetarians and 44% of potential vegetarians say they have **reduced their meat consumption** in the past year, compared with 27% of all U.S. adults. Similarly, 45% of potential semi-vegetarians and 44% of potential vegetarians say they ***intend to*** **reduce their meat consumption** over the next year, compared with only 18% of all U.S. adults. These segments are also much more likely to purchase **meat and milk alternatives—**40% of potential semi-vegetarians and 58% of potential vegetarians say they frequently or occasionally buy meat alternatives, versus only 23% of all adults. Similarly, 34% of potential semi-vegetarians and 52% of potential vegetarians say they frequently or occasionally buy milk alternatives, versus only 22% of all U.S. adults.

FREQUENT AND INCREASING MEAT CONSUMERS

Profile in Brief: The "moderate" and "regular" meat consumer segments together represent nearly three out of four U.S. adults. Because they are such a large majority, their characteristics and habits fairly closely mirror those of the overall population, although moderate meat consumers are more likely to be female. "Avid" meat consumers, on the other hand, skew heavily male and younger than other meat consumers. They are also much less likely to intend to reduce their meat consumption or to buy meat and milk alternatives. Finally, actual and intended meat *increasers*, each representing a small minority of the population, also skew significantly younger than other consumers; and intended increasers are much more likely to be male.

In this section, we briefly describe other consumer segments that may be of interest to vegetarian advocates, including moderate, regular, and avid meat consumers as well as actual and intended meat increasers. These groups are defined as follows:

- **Moderate meat consumers** are those who eat meat with "about half" of their meals; they represent one in four U.S. adults (25%).
- **Regular meat consumers** eat meat with "most" of their meals; they are a strong plurality, representing nearly half of the adult population (47%).
- **Avid meat consumers** eat meat with "every" meal; they are 14% of the population.
- **Actual meat increasers** eat more meat currently than they did one year ago; they represent fewer than one in ten U.S. adults (9%).
- **Intended meat increasers** plan to eat more meat one year from now; they are a very small minority of the population (5%).

We spend somewhat less time examining these segments for two primary reasons: 1) In the case of moderate and regular meat consumers, they are large segments with profiles that are generally similar to the population as a whole; and 2) In the case of avid meat consumers and actual/intended meat increasers, these segments represent very small minorities of the population, and they are arguably the most challenging audiences for vegetarian advocates. They are not attractive initial targets for advocates who arguably need to focus their efforts on more easily influenced consumers. Over the long term, however, vegetarian advocates will need to more closely consider these groups to encourage substantive change throughout the adult population. This includes particularly regular and moderate meat consumers, given the large sizes of those segments.

MODERATE MEAT CONSUMERS

Moderate meat consumers fairly closely resemble the characteristics of the adult population as a whole, including demographics, behaviors, and intentions. The gender of moderate consumers are more likely than the general population to be female (61%, compared with 54% of the overall sample). There is also some indication that moderate meat consumers skew older, however the differences are slight. With respect to most other respondent characteristics, including **consumer behavior, social relationships, philosophical inclinations, geographical location, education, income, and employment status**, the profile of moderate meat consumers closely resembles that of the overall population.

More than one-third (39%) of moderate meat consumers now eat less meat **compared with a year ago** (vs. 27% for all adults), while a much smaller proportion (6%) of moderate consumers increased their meat consumption during the same time. When asked about their intended eating habits **over the next year**, 24% of moderate meat consumers intend to eat less meat, compared with 18% of the overall adult population. When asked in more detail about potential **future meat reduction**, nearly one-third (29%) of moderate meat consumers stated that they would be very or somewhat likely to ever reduce their meat consumption by one half. Following the overall trend, however, a much smaller 8% of moderate meat consumers said they would be very or somewhat likely to ever eliminate meat from their diet. This group is also more likely than other meat consumer segments to purchase **meat alternatives**, although this finding does not extend to milk alternatives as well.

REGULAR MEAT CONSUMERS

The largest consumer segment includes people this study defines as “regular” meat consumers who eat meat with “most meals,” representing almost half of all U.S. adults (47%). Due to the large number of people who fall into this segment, the demographic and psychological profiles for this group are equivalent in most cases to the overall population. Regular meat consumers are very slightly more likely to be **male** relative to the overall sample of U.S. adults, but they’re consistent with the total population on all other demographic variables. In examining **historical consumption trends**, 71% of regular meat consumers currently eat meat with about the same frequency as they did one year ago; they are slightly more static consumers than the overall population (63%). Less than one fifth of regular meat consumers (18%) have decreased their meat consumption in the past year, compared with 27% of the population as a whole.

Looking at **intended meat consumption** over the next year, the vast majority of regular meat consumers (77%) say that they intend to eat meat with about the same frequency as they are now, slightly more than for all U.S. adults. On the whole, this segment of consumers seems somewhat open to the idea of reducing meat consumption, but less so than the rest of the population. One fifth (20%) of regular meat consumers indicated they would be somewhat or very likely to ever reduce their meat consumption by half, versus 24% for the overall population. A much smaller 4% of regular meat consumers said they would be somewhat or very likely to ever *eliminate* meat from their diet entirely, versus 7% for all adults.

AVID MEAT CONSUMERS

"Avid" meat consumers are those who say they consume meat with "every" meal, representing a small, but significant percent of U.S. adults (14%). It is interesting to note that this survey found the avid meat consumers segment to be equal in size to the combined semi-vegetarian and veg*n segments. Although both groups represent small minorities, there is evidence that adult eating habits in the U.S. are polarized. Avid meat consumers differ from the overall adult population in several significant ways. They are more likely to be **male** (56%) than female, despite a female bias in the overall survey sample. Interestingly, avid meat consumers skew significantly **younger** than the overall population. Nearly three in four avid meat consumers (72%) are under age 45, compared with the 56% of all adults in that age group. In other words, this group is most likely to be composed of **younger males**, although it also includes a substantial number of females.

Avid meat consumers are also more likely than other segments to say they are **employed full-time**, and they are more likely to be from the **Southern** rather than the Western or Northeastern U.S. More than four in ten (42%) avid meat consumers are from the South, compared with 35% of the full survey sample. When asked to agree or disagree with a series of philosophical statements, avid meat eaters differed only slightly from the general population, but showed the most contrast with the veg*n and semi-vegetarian segments. Compared with these groups, avid meat consumers were more likely to weigh in strongly for **human rights** as opposed to **animal rights**; 63% of avid consumers agreed with this statement, compared with 46% of veg*ns. Avid meat consumers are also the least likely segment to be willing to **pay higher prices** for humanely raised animal products. Only 28% of avid consumers agreed with this statement, compared with 41% of the overall population and 63% of veg*ns.

As with regular meat consumers, avid consumers are more likely than the overall population to say that they currently eat the same amount of meat **compared with one year ago** (73% versus 63%). There were few actual meat reducers (8%) among avid meat consumers, although the segment includes twice as many meat increasers (18%) as the overall population (9%). Avid consumers are less likely to try **meat or dairy alternatives**, with 69% indicating that they "never" purchase these products, compared with 51% of the overall population never purchasing meat alternatives and 59% never purchasing dairy alternatives. Most avid meat eaters (75%) say they intend to maintain their meat consumption **over the upcoming year**, similar to the adult population as a whole (72%). Another 11% of avid meat consumers said that they intend to *increase* their meat consumption over the next year, compared with only 5% of the total population.

ACTUAL/INTENDED MEAT INCREASERS

Actual and intended meat increasers both represent minority segments of the population. A small, but still meaningful one in ten adults (9%) say they have increased their meat consumption over the last year, while only 5% of the population say they *intend to* increase the amount of meat that they eat next year. Meat increasers, like "avid" meat consumers (and actual veg*ns), tend to skew toward the **younger** end of the adult spectrum, although they are just as likely to be **female** as they are to be **male**. Nearly two-thirds of actual meat increasers (64%) and 59% of intended meat increasers are **under age 35**, compared with just over one-third (36%) of U.S. adults overall. Similarly, although one-fourth (26%) of the adult population is **age 55 or older**, only 9% of actual meat increasers and 6% of intended increasers are age 55 plus. Actual and intended meat increasers do not distinguish themselves according to **geography, employment status, or education**.

Despite skewing younger, actual and intended meat increasers are slightly more likely to say that they are "**separated, divorced, or widowed**" when compared with the overall population. Almost twice as many intended meat increasers (49%) are single, never married as all U.S. adults (26%); Actual meat increasers are also more likely to be single, never married. While 30% of all adults have **household incomes** of less than $30,000, a much higher 45% of intended meat increasers report having the same income. It is interesting to note that based on the range of psychological survey questions, actual and intended meat increasers are very similar to the overall population despite being small minorities of consumers. One exception is that both actual and intended increasers are *more likely* to agree that they would **like to eat a healthier diet**, suggesting that they think increasing meat consumption is a healthy personal choice.

VI. Meat Reduction Motivations and Barriers

The decision to reduce or eliminate meat from one's diet involves a complex, multi-faceted process with a variety of motivations and barriers. The motives for meat *reduction* are mostly health-related, while for vegetarians the motives are split between health and animal-related concerns. The primary barrier to meat reduction is personal taste preference; the secondary barrier is the perception that consuming some meat is part of a healthy diet.

During both the Phase One survey and the Phase Two focus groups, HRC sought to identify the motivations and barriers that influence the decision to reduce consumption of meat. Social research on a variety of topics shows that effective persuasion requires emphasizing motivating factors and helping the target audience overcome personal barriers. Understanding what motivates or prevents change is essential for veg*n advocates to effectively promote a plant-based diet and encourage meat reduction. But any analysis must be careful not to oversimplify the influence of motivations and barriers on the decision process. In analyzing the data from this study, HRC recognized the complex and multi-faceted reasons people have for adopting any new attitude or behavior, and that what people *say* (for instance, in focus groups) may not truly reflect *how they act* or *what they believe*.

There are several apparent contradictions between what people say about their meat consumption and how they respond to different messages or arguments. For example, when asked, most people will say they prefer "rational" messages that are presented in a gentle, suggestive manner rather than emotional or hard-hitting messages. However, advertisers base almost all successful campaigns on messages that tap into people's core emotions, and there is evidence from social research that people are most responsive to emotional messages. Further, messages that have an "edge" of some sort appear to be more effective at cutting through the clutter of advertising and other sources of consumer information. In these and similar cases, the messages that people say will appeal to them are often different from the messages that actually result in attitudinal or behavioral change. Deciphering these differences can be challenging, but is essential for veg*n advocates to be effective.

One principle finding that underlies all of HRC's consumer research (as well as general research on social marketing) and is a major barrier for consumers is what we call the desire for "freedom of choice." Research participants consistently tell researchers that they do not want to be told what to think or how to behave. The ability to choose for themselves is important to nearly everyone and the most effective and long-lasting changes are often the ones that people perceive themselves to have made. This core tenet of social marketing has obvious implications for veg*n advocates, who are often viewed as proselytizing. The goal for advocates is to be clear about why and how people should change without sounding as if they are *forcing* change upon anyone.

> *"I don't think you can stick anything down anyone's throat. I would say middle class, a certain grade level of understanding to make them not think they're being forced, but it's an option being presented to you…"* Female, Kentucky
>
> *"I feel it is a personal choice and I wouldn't push…my beliefs on anyone else. If my husband and kids choose that someday, I think that would be great… I never forced it on them when they were younger."* Female, Vegetarian, Washington State

Another important principle that bears mention here as an overarching barrier for consumers is that most people do not make large or quick changes, and many are in fact afraid of or resistant to such change. Many people who are unfamiliar with veganism, for instance, immediately react that they "could never do it themselves" when the diet is described to them. However, when asked if they could *limit* their meat consumption, nearly everyone who participated in the focus groups acknowledged that it would be possible. The likelihood that someone will change their behavior is predicated in part on where they are starting from and how attainable they feel the change to be. This underscores the need to segment and precisely target audiences for both vegan and vegetarian advocacy. Advocates must first understand how much meat their target audience is currently consuming, and then determine meaningful – but incremental – changes to encourage of them.

MOTIVATIONS OF VEGETARIANS

Phase One included only a small number of actual vegetarians and vegans (N=40), but all were asked about their reasons for choosing their current diets. These people cited both animal issues and health/weight issues (combined) to be comparably important reasons for eliminating meat from their diets (however, note the high margin of error for this segment, which also may affect the ranking of responses). Table 9 summarizes responses to this question for veg*ns only.

Table 9. Top 5 "Primary" Reasons for Not Eating Meat

Rank	Vegetarians and Vegans Only
#1	30% - To reduce animal suffering
#2	20% - Health in general
#3	10% - Don't like the taste of meat
#4	10% - To reduce impact on environment
#5	8% - To reflect spiritual beliefs
	9% - Other health-related reasons
	13% - Other non-health-related reasons

In general, veg*ns appear to have a greater concern for animals and the environment than meat consumers. Four in ten (40%) veg*ns say they were motivated by one of these reasons to eliminate meat from their diet. While health issues were also frequently cited as dietary motivators, health seemed to be slightly less of a motivator than among non-vegetarian consumers (see the next section). The responses show that current veg*ns were split between the 30% who cite animal suffering as a primary reason and the 29% who cite health-related reasons (including weight management and specific issues such as cholesterol, hormones, and antibiotics). Some veg*ns (10%) said that they simply have a general preference for other foods, including not liking the taste of meat. Finally, about one in eight veg*ns (13%) wrote in some other answer, with most identifying multiple reasons in combination as their motivation for choosing a meat-free diet.

In addition to their primary reason for choosing a vegetarian or vegan diet, these people were also asked what issues *contributed* to their decision, with multiple answers allowed. Nearly two-thirds of respondents (65%) chose "to eat a healthier diet in general," while 55% selected "reducing animal suffering." Avoidance of antibiotics, reducing impact on the planet, and reducing fat and cholesterol intake followed at a distance, with 28-30% of veg*ns citing each reason. Note that the typical respondent chose three of the listed reasons for becoming vegetarian, underscoring the notion that veg*ism is a multi-faceted decision rather than being driven by any single motivator. This finding seems to challenge the notion that any single approach is best for vegetarian advocacy. In fact, there may be many good approaches depending on the target audience's baseline attitudes and behavior.

HRC's 2005 Phase One findings are generally consistent with the 2002 vegetarian focus group discussions conducted in Seattle, Washington. During these sessions, the most frequently cited personal reason for converting to vegetarianism was factory farming, but it was closely followed by health-related reasons. Focus group participants also gave other reasons similar to those discussed above, however, and almost all participants gave at least two or three reasons why they had chosen to become vegetarian or vegan. Similar results, discussed below, follow from the Phase Two focus groups with semi-vegetarians and meat reducers.

There is both direct and anecdotal evidence that a significant number of vegetarian or vegans revert back to consuming meat. This topic was not addressed in the Phase One survey, but many of the focus group participants mentioned that they had been vegetarian at some point in their lives. In some cases, people found vegetarianism hard to maintain, while in other cases the reversion to meat consumption was prompted by a major life event such as a pregnancy or marriage. Similarly, several vegetarian participants mentioned having tried to follow a vegan diet for a limited time, but most found it too difficult to maintain. Those who are sympathetic toward animal issues consider veganism to be an ideal diet, but most believe that they would not be able to adhere to such a "restrictive" diet. There is also indication that some people, including some vegetarians, view a vegan diet as extreme or unnecessary for good health or even to reduce animal suffering.

> *"When I was a vegan and more vocal, I think it was more about me being pure and being moral and it wasn't so much about what I had originally cared about, which was about issues of pacifism, so I reevaluated."* Female, Vegetarian, Washington State

> *"I think it's easier to be a vegetarian than a vegan. It's easy to get all your protein and nutrient needs as a vegetarian, but very challenging as a vegan."* Female, 25-34, Semi-Vegetarian, Minnesota

> *"I tried to be a vegan…some time in my junior year of high school. To be a vegetarian…when all your friends are going out and meeting for burgers, I think it was a huge step just to stop eating meat, let alone adding dairy. I mean I had a million things to worry about—what I was going to wear the next day, and I don't have time to worry about not drinking milk, so for me, not eating meat was a big enough step."* Female, Vegetarian, Washington State

MOTIVATIONS OF MEAT REDUCERS

The Phase One survey also addressed the motivations of both actual and intended meat reducers to gain a sense of the primary reasons driving meat reduction in the U.S. The minority of U.S. adults (20-25% of the population) who have demonstrated through their behavior and/or intent that they are likely to reduce their meat consumption very clearly indicate that health and weight issues are the primary factors in their decision. According to the Phase One data, health and weight issues account for the top three reasons for both meat reducer segments, including a strong majority of respondents in each group. More than three-fourths of actual meat reducers (77%) and intended meat reducers (79%) mentioned health or weight as the primary motivator for reducing their meat consumption, as summarized in Table 10.

Table 10. Top 5 "Primary" Reasons for Reducing or Planning to Reduce Meat

Rank	Actual Reducers	Intended Reducers
#1	37% - Health in general	35% - Health in general
#2	24% - Fat and cholesterol	28% - Fat and cholesterol
#3	16% - Lose weight	16% - Lose weight
#4	11% - Eat less expensively	6% - Animal suffering
#5	3% - Don't like taste of meat	4% - Eat less expensively

Note the consistent ranking of the top three choices for both consumer segments, as well as the appearance of "animal suffering" on the list for intended reducers. Concern for animals was selected by only 6% of adults, however (and past behavior is a better indication of the future than personal predictions or intentions). During the Phase Two focus groups, researchers explored each of these topics to add qualitative depth to the Phase One survey results. Actual meat reducers and semi-vegetarians, who constituted the majority of focus group participants, were asked to discuss in detail their personal motivations. The focus group findings were generally consistent with the Phase One results, but also provided additional insight.

HEALTH-RELATED CONCERNS

As the Phase One results showed, health-related concerns are the single most influential reason for reducing meat consumption for all consumer segments. (Note that for purposes of this analysis, "to lose weight" is a health-related motivator, even though a desire to lose weight may be driven by body image issues rather than or in addition to personal health concerns.) Discussions in the focus groups also touched on **personal health issues** such as age, weight, diabetes, high cholesterol, and a general concern for high fat foods. In particular, the majority of participants perceive red meat to be unhealthy, and some make an effort to substitute poultry and seafood in the place of red meat. However, a few participants also mentioned reducing chicken and fish consumption due to personal digestive or other health problems.

> *"I don't have a problem with my kids or other people eating meat. My reason for being vegetarian is just because I researched the facts and found it healthier."* Female, Minnesota

> *"I took a class in college that said we are eating way too much meat compared to how we used to eat as cavemen. Also our salt and sugar consumption is high. Then my dad got gout from eating too much meat. That freaked me out, so I stick with birds and fish; then once in a while I eat the cow and pig."* Female, 18-24, Oregon

> *"I really miss eating meat. Unless there was a really compelling health reason, I don't see becoming vegetarian."* Female, Kentucky

Second to the influence of one's personal health, focus group participants mentioned the **health of a family member**, including spouses, children, and parents as a driving factor in meat reduction. Often noted as a reason for reducing personal meat consumption, participants said that they would modify their diets when a close family member that they lived with was diagnosed with a medical problem that necessitated a diet change. Some conditions specifically mentioned by participants include heart disease, diabetes, high cholesterol, and high blood pressure. Respondents noted that a health issue for a family member can induce a *personal* decision to reduce meat. This may be driven by the perceived impracticality of preparing different meals, empathy for the ill family member, and/or greater awareness of personal health caused by the relative's illness.

CHEMICALS, ADDITIVES, AND DISEASES

Somewhat related to personal health issues are concerns about additives in meat products, including **antibiotics and hormones**. During the Phase One survey, 14% of actual meat reducers selected this reason as a contributing factor for reducing their meat consumption over the past year, although only 1% said it was their primary reason. The overall public attention to, and therefore significance of, this issue has likely increased since this research was conducted. Growing consumer interest in organic foods, for instance, has been fueled in part by concerns about the use of antibiotics, hormones, and pesticides to produce meat and dairy products. Note that only 2% of *intended* meat reducers consider antibiotics and hormones to be their primary reason for eating less meat over the next year. Several focus group participants also commented that today's children appear to reach maturity at a significantly earlier age than they did historically. Some participants believe this to be related to the presence of hormones in U.S. meat and dairy products.

> *"I'm concerned about the hormones and antibiotics used in meat production. The age of puberty has come down a year from my generation. You have to wonder if that's why."* Female, Texas

Also related to chemicals and additives are respondents' concerns about other **toxins and diseases** that could potentially be in the meat supply. This is partly the result of the constant and increasing media focus on topics such as mercury levels in seafood, bovine spongiform encephalopathy ("mad cow" disease) in U.S. and Canadian farmed cows, and avian influenza. Although there has been significant attention paid to these issues in the media, these concerns did not seem to be a major issue for most of the Phase Two focus group participants. There did, however, seem to be a general concern about the cleanliness and purity of the meat supply among many participants.

> *"I trust a piece of broccoli more than trust the meat. I can wash off broccoli but that meat was grown in a being and you don't know what it's eaten or if it had worms or anything."* Female, Texas

FOOD COSTS AND CONVENIENCE

A less frequently mentioned, but still fairly common reason for reducing meat consumption is the high cost of meat products. This topic came up in both the Phase One survey results and the Phase Two focus group discussions. During Phase One, this issue was significant, with 29% of actual meat reducers saying that cost contributed to their decision to reduce meat consumption. One in ten actual meat reducers (10%) said they consider cost to be the primary reason for reducing meat consumption. However, when predicting their own future behavior, survey respondents mentioned cost less frequently, and only 3% of intended meat reducers said this would be their primary reason for eating less meat a year from now. When discussed during focus groups, the high cost of meat came up occasionally, but did not appear to be a major driver of meat reduction.

Additionally, while the cost of meat may be a factor in the decision to reduce meat consumption, it can also serve as a *barrier* to substituting meat with other products. This is true because both meat and dairy alternatives are perceived to be more expensive than their animal product counterparts, and in many cases they actually are more costly due in part to lower economies of scale. This theme was a recurring one among many of the focus group participants when discussing the likelihood of using soy milk and other dairy alternatives as well as meat substitutes.

"I just compare a box of frozen hamburger patties versus a box of veggie patties and how much more you get of the meat versus the soybean." Female, District of Columbia

"I've had the strawberry soymilk from Trader Joes, which goes down good and quick. And I've had the vanilla. It's not bad. [But I haven't become a regular consumer] because of price." Female, 35-44, Actual Meat Reducer, District of Columbia

Perhaps more than cost, the convenience and availability of food products can be significant factors in an individual's food selection and preparation. This concept was not addressed in the Phase One survey, but during the focus groups, non-vegetarian participants repeatedly stated that they would be willing to try alternative meat products if they were easily accessible. Many non-vegetarians have tried alternative products offered to them by friends and family. However, when left to the individual to seek them out, it seems less likely that he or she will follow through. There is significant resistance to trying these products if a special trip is required to obtain them, but interviewees also suggest that there is resistance even when the products are located within the same store, but in different sections. A few participants mentioned that they would like the alternatives shelved in the same area as the original product, although this may not be practical for all situations.

"If they [meat alternatives] were next to each other in the store… If you could go to Safeway or Giant and you don't have to search for them… I compare prices, so I prefer them to be on the same shelf." Female, 25-34, Actual Meat Reducer, District of Columbia

CONCERN FOR ANIMALS AND THE ENVIRONMENT

Based on the Phase One research, concerns about animals or the environment seem much less likely than other (mostly personal) factors to lead to a decrease in meat consumption. Fewer than one in ten actual meat reducers (9%) from the Phase One survey indicated that animal suffering contributed to their decision to eat less meat in the last year, and only 2% indicated that this was their primary reason. A slightly larger 5% of intended meat reducers specified that the suffering of farmed animals would be their "primary" reason for intending to eat less meat over the next year. Semi-vegetarians are twice as likely as all adults to be concerned about animal suffering, despite being driven to change largely for health-related reasons. Nearly one-fifth of meat reducing semi-vegetarians (18%) say that concern for animals contributed to their decision to eat less meat, and 10% identified this reason as a motivator for intending to reduce meat in the coming year.

"I've been trying to eat less meat. I'll have some hamburger, chicken, but not like we used to with steaks and pork chops. I'm an animal lover and I don't like to think about what happens to those animals. I can eat a hamburger but I don't think about where it came from. We eat very little meat." Female, Age 65+, Meat Reducer, Minnesota

Personal concern for the environment appears to have little influence on one's decision to reduce their meat consumption. During Phase One, actual meat reducers were least likely to select "to reduce impact on the planet and/or environment" as a primary reason for reducing meat consumption (chosen by 0%), among ten possible reasons listed. Similarly, only 2% of intended reducers chose the environment as their primary reason for intending to reduce meat over the next year. Many of the focus group participants, including both vegetarians and non-vegetarians, however, seemed to be aware of the potential impact that farming animals has on the environment. Some commented that a significantly higher amount of environmental resources is required to farm animals than vegetables. It is interesting to note that although knowledge of the environmental impact of consuming meat is fairly common, this reason does not seem to have led to much actual behavior change.

> *"I'm an environmentalist and it takes so much more land resources to make meat than grain foods. We give up meat for six weeks every year for lent. You just learn to eat that way. My kids never expected to have meat for their meals."* Female, Texas

> *"I think a lot of people know that animals are tortured and don't care, so that's probably not effective. I think talking about the amount of land and resources that go into producing meat would be a good argument."* Female, 35-44, Semi-Vegetarian, Minnesota

RELATIONSHIPS

According to Phase Two focus group participants, relationships with other meat-limiting individuals, including vegetarians, can be an important meat reduction motivator. When respondents have socially interacted with individuals on a meat-restricted diet, meat consumers appear more willing to adjust their diet to match that of the other person. Often, the person thought to have a healthier diet influences the individual thought to have the less healthy diet. Because meat is largely perceived to be unhealthy, meat reducers and veg*ns tend to influence others toward meat reduction. The reverse can be true, however, and participants also mentioned being influenced to eat more meat, often in cases where households want to avoid cooking multiple meals.

> *"I've thought about it [becoming vegetarian], but never tried it. I think it depends on your social situation. I cook for my husband and I eat what I cook for him. If I was single, then I could eat a salad and not eat meat as much."* Female, 25-34, Semi-vegetarian / Static Meat Consumer, Texas

> *"I also eat less meat because my sweetheart is a vegetarian, so I prepare food he will eat so he won't starve to death as a courtesy. But I like those foods as well. It's also cheaper. Vegetables are quicker to make."* Female, Kentucky

PERSONAL TASTE

Respondents also cite personal taste as a reason for decreasing meat consumption. In the Phase One survey, 9% stated that they reduced their meat consumption in part because they wanted "to eat preferred foods." In other words, these individuals do not care for the taste of meat in general. Another 2% of respondents indicated that they intend on eating less meat in the future because of this taste preference. In addition to simply not liking the taste of meat, several participants expressed some level of disgust or revulsion with meat or other animal products. As we might expect, this was most evident with veg*n participants, but it was also true for some semi-vegetarians and meat reducers.

> *"But almost everything I cook has cheese… I won't give up taste for something healthy. I won't get soy cheese."* Female, 35-44, Meat Reducer, Minnesota

> *"And eggs I don't eat, it's really weird, but they come out of a chicken's butt. I'm not eating anything that comes out of something's butt. That's why I don't eat eggs."* Female, 45-54, Vegetarian, Washington State

KEY BARRIERS TO MEAT REDUCTION

The Phase One results demonstrate that roughly 75-80% of the U.S. adult population does not show any interest in reducing meat consumption or becoming vegetarian. Vegetarian advocates can use this context to understand the challenges they face when seeking widespread adoption of plant-based diets. Additionally, most adults who do show some interest in reducing or eliminating meat still have significant barriers to overcome before they will change their behavior. Both phases of this study corroborate that meat consumers identify **taste as the number one barrier** to reducing or eliminating meat from their diet. In fact, in open-ended survey responses, nearly two-thirds (62%) of those who provided comments said they would not reduce or eliminate meat from their diet because of taste. Table 11 shows the responses to the following question addressed to all meat-consuming respondents in the Phase One survey. These are "unaided" responses to an open-ended question, meaning that no discrete options were presented to survey respondents.

What are the primary reasons, if any, that you WOULD NOT reduce your meat consumption by half or eliminate meat from your diet entirely?

Table 11. Reasons for NOT Being Likely to Reduce/Eliminate Meat

[Based on coded answers to open-ended Phase One survey responses, excluding blanks]

Reasons Given	Number of Comments	Percentage of Respondents (N=2,442)
Taste preferences and "cravings"	1,525	62%
Nutrition, health, and medical reasons	905	29%
Lack of compelling reason to reduce meat consumption	126	4%
Way of life or personal ideology	118	4%
Habit and/or upbringing	105	3%
Familial and social influences, convenience	63	2%

Enjoying the taste of meat is easily the most frequently mentioned barrier to reducing or eliminating meat from one's diet, with more than twice as many mentions as the next reason. Note that many respondents also commented that they would not reduce or eliminate meat for perceived health reasons, showing the duplicity of health as both a motivator and a barrier. These two barriers—taste preferences and health/nutrition—were the only two reasons for not reducing or eliminating meat that were mentioned by more than about 4-5% of meat consumers. These barriers also came up frequently during the Phase Two focus groups, often in combination with other reasons. Other barriers mentioned in the Phase One survey and discussed during the focus groups include simply a lack of a good reason to reduce meat consumption, personal ideology, and family or social influences. We discuss some of these barriers in more depth in the following sections.

TASTE PREFERENCES AND MEAT "CRAVINGS"

As noted above, the single most frequently mentioned barrier to meat reduction and elimination is personal taste, i.e., enjoying the taste of meat products. An overwhelming number of respondents simply stated that they enjoy meat and that it adds "variety" to their diet. A large number of respondents, however, included other reasons in conjunction to their personal preference, such as versatility in cooking, lower cost, and most frequently, a perception of meat's important nutritional value. Therefore, the majority of survey respondents did not see a need to reduce or eliminate an item that they personally enjoy in their diet. This was also evident during focus group discussions, in which taste-related issues came up frequently, often in combination with other reasons. Overall, taste preferences are the dominant barrier to greater adoption of vegetarian foods, and this issue must be addressed head-on by vegetarian advocates.

"I very much enjoy the taste of all meats, from beef and poultry to fish and shellfish." Male, 18-24, New York State

"There are certain things I like in chicken or fish and I don't think there's anyway an alternative product could taste the same." Female, District of Columbia

Many survey respondents also seemed to equate taste preferences with perceived physical cravings for meat, although it may be important for vegetarian advocates to distinguish the two. The concepts are related, but taste preferences are arguably not as deep-rooted and therefore potentially more subject to persuasion. Physical cravings, real or imagined, relate to perceived needs rather than preferences, and may therefore pose significant challenges for vegetarian advocates. Cravings for meat were mentioned by about 1% of survey respondents and were also regularly mentioned during the focus groups. Also, many research participants who had previously attempted to reduce their meat consumption or eliminate it from their diet said that they had eventually surrendered to their "craving" for meat products. Several vegetarians and vegans also noted that they had experienced a craving for meat when they first eliminated it from their diets, but that the cravings dissipated over time as their bodies became accustomed to the change in diet.

"I love meat and believe that it is a source of protein. My body craves it." Female, 18-24, Maryland

"I love chicken and I don't know I could give up the craving for the taste." Female, 18-24, Indiana

NUTRITIONAL, HEALTH, AND MEDICAL CONCERNS

As discussed previously, health-related issues are the number one reason that actual and intended meat reducers give for reducing their consumption of meat. However, this view is often limited to only red meat, because most meat consumers perceive other types of meat (primarily chicken, fish, and turkey) to be relatively healthy food choices. Additionally, and somewhat paradoxically, the perceived healthfulness of consuming meat is also one of the primary barriers to reducing or eliminating meat. Many people believe that some source of "meat protein" is essential to maintaining a healthy diet, and some mention getting recommendations from doctors to consume meat. Others indicate that meat is a necessary part of their diet due to certain medical conditions, such as diabetes. More than one-fourth of survey respondents (27%) mention the nutritional or health value of meat when asked why they would not reduce or eliminate it from their diet.

"I've tried every way to stay vegetarian because I've never liked meat. Three to four years in high school I didn't have meat, but my iron count was low and my doctor said to take supplements. I had no choice but to go back to some meat with iron in it, like chicken and rarely some red meat." Female, 25-34, Actual Meat Reducer, District of Columbia

"I would not totally delete meat from my diet due to the nutrients and substances that we as humans need." Female, 25-34, Michigan

The concept of "moderation" was prevalent in the survey responses and the focus group discussions as participants expressed views that almost anything in moderation is acceptable, while extremes in either direction are not. There was an interesting polarization during the discussions, in which most people agreed that consuming large quantities of meat and consuming no meat at all are both unhealthy food choices. This **resistance to extremes** can have a significant influence on how people perceive messages or recommendations, including from vegetarian advocates. If a recommendation involves overly indulging or completely eliminating any category of food, most people view the recommendation with skepticism, and as possibly unhealthy. During the course of this research, several focus group participants viewed the total elimination of meat from one's diet as unhealthy; further, a few stated that they would question any doctor who made such a recommendation.

Closely related to the concept of moderation is the perceived need to maintain a "balanced" diet for proper nutrition. The concept of balance came up many times in both the survey and the focus groups, usually in relation to a traditional definition of what constitutes a balanced diet, which many people believe includes food from all major "food groups."

> *"I feel that a balanced diet of all food groups is essential for proper growth and a healthy body and that includes the protein found in beef and other meats."* Female, 25-34, Pennsylvania

> *"Because I believe that human beings need some meat to live out healthy lives, just not as much as we eat now."* Male, 25-34, New York State

> *"I enjoy a balanced diet and do not believe that eating items in moderation is harmful."* Male, 65 or older, New Jersey

FAMILY AND SOCIAL INFLUENCES / CONVENIENCE

Social interactions with an individual's family, friends, or significant other can directly and significantly affect eating habits. In particular, family was mentioned as a primary barrier to meat reduction by an estimated 2% of all survey respondents, while another 3% referred to being raised a certain way (i.e., religious or cultural heritage). It appears that most individuals are not willing to follow an alternate dietary regimen from others in their household due to the inconvenience of preparing separate meals. In response to the open-ended survey questions, many spouses said that they would not be willing to cook separate meals if their spouse was not vegetarian. In cases where children are involved, most parents are also unwilling to cook separate meals, especially because many view the inclusion of meat in their child's diet as nutritionally important.

> *"My husband wants meat at every meal, otherwise, I would be more likely to be a vegetarian."* Female, 55-64, Rhode Island

> *"My children and husband like meat - so it is easier to cook for 4 people."* Female, 25-34, Colorado

This social impact of dietary choices is not limited to family and other, non-familial relationships can also be a significant influence. This may involve a general deviation from what is socially normal or acceptable, and in some cases can be a source of conflict for an individual among her or his peers. A vegetarian or vegan individual, for instance, must be sufficiently motivated to adhere to a diet shared by only a minority of peers, and strict adhesion will often require additional effort to maintain the diet in different circumstances. A person must be willing to be inconvenienced to follow a vegetarian diet, simply because it differs from the majority of the population. In more specific terms, the dietary choices of close friends and housemates may prevent someone from reducing their meat consumption, either temporarily or even beyond the duration of the relationship.

> *"To change from vegan, I had to go through a lot of soul searching, but the social aspect for vegan, I think, it is hard when you want to make an individual choice and just have it affect you, but when you are trying to be social and people are having to jump through hoops when you want to just be low key."* Female, Vegetarian, Washington State

NON-VEGETARIAN PERCEPTION OF VEG*NS

It is helpful for vegetarian advocates to understand the perception that non-vegetarians have of veg*ns and veg*n advocates. This is true particularly because most, if not all, advocates are coming from a different personal perspective than the target audience, both attitudinally and behaviorally.

In Phase Two, focus group participants were asked to define the two terms, “vegetarian” and “vegan,” and then discuss what these labels mean. In some cases, participants could distinguish between the terms, but it was more commonly assumed that “vegan” was another term for “vegetarian.” Where the distinction was understood, “veganism” was perceived to be a more extreme lifestyle, even by current vegetarians. Focus group discussions underscored the traditional stereotype of a vegetarian as someone who is slender, healthy, well-disciplined, and socially and environmentally conscious. Other stereotypical generalizations in the focus groups characterized vegetarians and especially vegans as being very committed to social activism and, in some cases, constantly trying to influence others to convert to their ways, sometimes using sensational messages or tactics. Specifically, vegans were more commonly associated with animal rights activism than vegetarians, although there were also comments that *vegetarianism* is becoming “mainstream.”

> *“Beyond being socially acceptable, there is more of a liberal slant to vegetarians. If you’re a vegetarian, you were almost on the liberal side. Now it’s coming to the middle… It’s not just the tree huggers that are vegetarian any more. It’s becoming more mainstream.”* Male, Minnesota

Most non-vegetarian focus group participants mentioned that they are familiar with a vegetarian in the capacity of a friend, family, or co-worker. Where a familial relationship exists, the perception of the vegetarian (or vegan) is usually softened, and the diet is not considered as extreme as among those who do not know any current vegetarians. Non-vegetarians seem to make an effort to be considerate and accepting of a vegetarian family member, including varying their cooking methods and adjusting their own dietary practices to be considerate. There are, however, instances where a vegetarian or vegan lifestyle causes some conflict among family members, particularly where one family member tries to impose their philosophy and thinking onto family members with opposing views. In cases where a non-vegetarian person has a *friendship* with a vegetarian (as opposed to a family relationship), the influence on their perception of vegetarianism is more subdued. The actual influence varies significantly, but in general it seems that having a vegetarian friend has some influence in motivating the non-vegetarian to accept vegetarianism (at least conceptually) and to try different foods. The dietary differences can also be a source of potential conflict, however, and may result in some vegetarian friends being excluded when deciding on dining plans, for instance.

> *“A vegetarian friend at work, people assume she would be preachy. So when people see she’s vegetarian, they get really defensive and down on her. So if I were vegetarian, I’d probably disguise it more so I don’t get attacked.”* Female, 25-34, Actual Meat Reducer, District of Columbia

> *“My uncle is a vegan, so family get-togethers have always been a little tense. For a while he wouldn’t even be in the same room if anyone eating meat… so it caused a lot of familial turmoil, kind of. At that time I was still eating meat and he would preach to us young’ns.”* Female; 18-24, Oregon

VII. Consumption of Alternatives

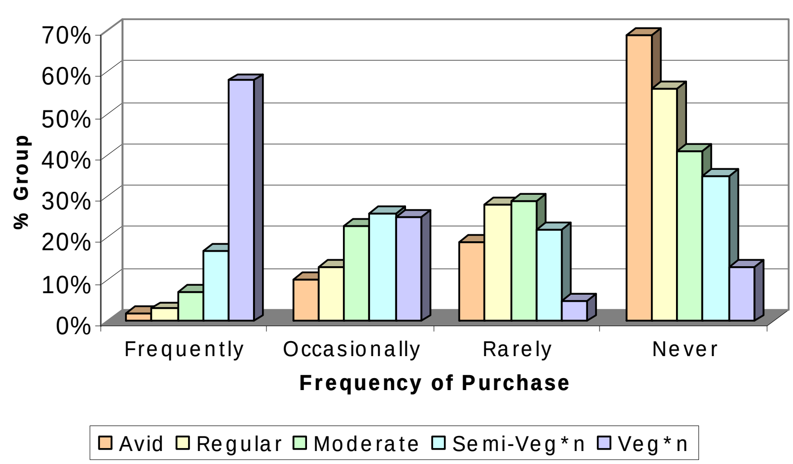
U.S. adults are not frequent consumers of meat and dairy alternatives, but there is evidence that purchases of these products are on the rise. Similarly, there appears to be significant growth in purchases of other alternative food products such as organic and whole-grain foods as well as "humanely-raised" animal products. However, these alternative products also have several negative associations for many adult consumers.

During both phases of research, respondents and participants were asked about their consumption of, and attitudes toward, meat and dairy alternatives. This is important information for the companies that make alternative products, but also for vegetarian advocates who often make recommendations to would-be vegetarians. Based on this research and on publicly available data covering the vegetarian food market, it is clear that overall purchases of meat and dairy alternatives are growing dramatically. There is also clear evidence that most of this growth is coming from regular meat consumers and semi-vegetarians who choose to replace meat in some meals, rather than demand from current veg*ns. These trends are also related to a growing interest in more wholesome and healthful foods, as evidenced by the increasing sales of organic products. Finally, consumers show strong interest in and willingness to pay more for products from "humanely raised" animals.

MEAT ALTERNATIVES

Despite the increased sales in recent years, the majority of U.S. adults are unfamiliar with meat alternative products. About half (51%) of Phase One respondents say they "never" purchase meat alternatives, and another 26% only "rarely" purchase them. Less than one-fourth of U.S. adults (23%) say they "occasionally" (17%) or "frequently" (6%) purchase meat alternatives. Actual vegetarians, not surprisingly, are the largest consumers of meat alternatives, on a per person basis. More than half of vegetarians and vegans polled (58%) say they "frequently" purchase meat alternatives. There is an overall inverse relationship between the amount of meat consumed and the frequency of meat alternatives purchased by consumers, as shown in Chart 3.

Chart 3. Frequency of Meat Alternative Purchases, by Consumer Segment



Demographic variables also appear to have some relationship to the frequency of meat alternative purchases. U.S. adults **age 25-44** and those involved in **domestic partnerships** are slightly more likely to purchase these products. According to the Phase One survey results, the frequency of purchasing meat alternatives increases as one's **level of education** increases. Respondents with college degrees or more education say they purchase these items on a more frequent basis than their less formally educated counterparts. This is also the case with **higher incomes**, as the frequency of meat alternative purchases increases slightly as annual household incomes rise above the $50,000 level. Education and income are closely related factors and typically show similar trends, but this finding is especially interesting given the earlier discussion of cost as a barrier to reducing or eliminating meat from an individual's diet.

> *"I do notice the price is a big difference. I've eaten some of those products (alternatives), I was just never impressed enough to get it."* Female, 35-44, Actual Meat Reducer, District of Columbia

According to the Phase Two focus group participants, the most widely known meat alternatives are tofu and brand name products such as Morningstar and Boca Burger. Semi-vegetarians and actual meat reducers were likely to have consumed these products, or at least tried them, reflecting the relatively significant hold that these items have among meat reducing segments. The participants who consume meat more frequently were not as familiar with these meat substitutes. Because of its unique texture and bland taste when in raw form, most people believe that **tofu requires special knowledge** for preparation. An individual's opinion and preference for tofu can vary dramatically according to the product's preparation. Several focus group participants said simply that they do not like the taste of tofu, which was a common opinion, especially among non-vegetarian males.

> *"I don't see a suitable substitute for a protein that's needed in my diet. I don't like tofu and I don't' see getting enough protein out of beans because it's too high in carbs. That doesn't sit well with me as a diet."* Female, 25-34, Regular Meat Consumer / Intended Meat Reducer, Kentucky

> *"[Would not eliminate meat] because it provides important nutrients and I love the flavor. Thanksgiving with a tofu turkey is just sick and wrong."* Male, 25-34, Regular Meat Consumer, Michigan

> *"I like the fried tofu and I'll cook it with other vegetables. Depending on how it's cooked and you can't tell the difference. I'm okay with it."* Female, 25-34, Actual Meat Reducer, District of Columbia

The generically defined **"veggie" burgers** are another common alternative to meat. They include direct substitutes that try to simulate the taste and texture of meat, or products openly marketed for their vegetable-based ingredients. Meat consumers who have tried these products generally seem to consider them acceptable. However, meat alternatives that intentionally simulate the taste and texture of meat products yield diverse opinions that vary from product to product. Worthy of note is that several participants, including vegetarians and non-vegetarians, mentioned they think it is ironic to have vegetarian products that simulate meat. This was a fairly common refrain during the focus group discussions, and it may be rooted in the participants' own aversions to real meat products or may be a defense mechanism to justify a dislike for alternative products.

> *"I'm not comfortable at all cooking meat. I don't ever think about adding meat unless someone suggests it. I don't eat much Morningstar because it's too much like meat."* Female, Minnesota

In general, most non-vegetarians seem willing to try meat alternatives, including tofu, if the products are convenient, cost is not an issue, and if they perceive the taste to be pleasant. Illustrative of this is the fact that most non-vegetarians who have tried one or more of these products did so due to an association with a friend or family member, who had usually prepared it for them.

DAIRY ALTERNATIVES

The vast majority of Phase Two research participants, including vegetarians and non-vegetarians, drink and consume dairy products (from cows' milk) to some extent. (This question was not asked in the Phase One survey). Moreover, more than half (59%) of U.S. adults say they "never" purchase milk alternatives such as soy milk. Only 10% of the adult population "frequently" purchases milk alternatives, while 12% do so "occasionally" and 19% do so only "rarely." In the Phase Two focus groups, consumers most commonly noted dairy's perceived importance as a source of calcium as their reason for drinking milk. A large number of participants also expressed a strong preference for cheese and stated that, while other dairy products were not as important to them, cheese was one food product that they would not be willing to eliminate from their diet.

> *"I always have to have cheese—cheddar or the white one. A meal doesn't seem complete without cheese. And I don't like that because I'm lactose intolerant."* Female, 18-24, Oregon

During the focus groups, most participants said they have tried soymilk, although many suggested that it is an acquired taste. Participants note that some brands and flavors are better than others, in particular Silk, which appears to be the most widely available and strongly favored brand. Many of those who have not tried soymilk say they have not purchased the product because of its higher cost, and since dairy products suit their needs, they have found no compelling reason to try alternatives. Participants who were entirely unfamiliar with dairy alternatives or had had very little exposure to them were much more leery of milk substitutes. Most participants do say, however, that they would be willing to try soymilk if a sample was readily available and cost was not an issue.

> *"Soymilk just seems disgusting. I like the real thing. I want milk. I'm a carnivore; I want milk, not a substitute. It probably is healthier, but I'm not interested. I'm willing to try samples, though. Also, since I see it in the health food store, I assume it's more expensive."* Female, District of Columbia

As with meat alternatives, current veg*ns are the largest consumers of dairy alternatives, according to the Phase One results. However, semi-vegetarians and meat reducers are significantly more likely than other meat-consuming adults to purchase both types of products. During the course of Phase Two focus group discussions, participants made several interesting observations about soy milk in particular:

- Soy milk is an acquired taste that most individuals must learn to enjoy (or tolerate) over time. Flavored soymilks are more tolerable to some, but taste is still a major concern to many individuals, particularly for those who have never tried these products.
- Soy milk and other soy-based products are thought to offer health benefits unmatched by most traditional dairy products, although cow's milk continues to be associated with calcium.
- Soy milk and its derivative products such as soy yogurt and soy cheese are significantly less available in stores and also more expensive than traditional dairy products.
- The soy based product range, including cheeses and yogurts, is considered inferior to actual dairy products in terms of both taste and texture. The options for these types of products are limited and few people, if any, expressed a liking for them.
- Concerns about animal suffering were essentially non-existent with respect to dairy consumption. People very rarely associate dairy products with animal suffering issues, and for most people the association is much clearer when it comes to consuming meat.

"HUMANE" AND OTHER ALTERNATIVES

The recent growth in purchases of organic, free-range, and whole food products demonstrates the strong consumer interest and willingness to pay premiums for foods that are believed to be healthier for consumers, more humanely raised, and easier on the environment. The quest for better health is a driving force behind the increased demand for these types of products. Most focus group participants said they are opposed to using chemicals, pesticides, or other unnatural additives in their food, or in the animals that produce their food, as discussed previously. This issue seems to be of particular concern for the elderly, those with children, and the more educated population segments, all of whom are more keenly interested in personal health. Many of the focus group participants also said that they seek to limit their consumption of highly processed foods, which is a related concern.

When asked about organic and free-range food products, focus group participants expressed interest, but also said they are unable to purchase those products because they are more expensive. In addition to organic and whole foods, there has also been growth in so-called "humanely-raised" animal products, including meat, eggs, and dairy. These may include "free-range" products or those branded under one of the current "humanely raised" licensing programs operated by animal advocacy groups or other third parties. Based on the Phase One survey, an estimated 41% of respondents said they are willing to pay more for humanely raised products, more than twice the number saying that they would *not* be willing to pay more (19%). However, a substantial proportion of respondents (40%) neither agreed nor disagreed that they would be willing to pay more, and it is clear from the focus group comments that price remains a significant barrier.

> *"I hear about the expense of buying organic meat. If you're getting your stuff out of the garden and buying organic vegetables, you're going to spend $40-50 a day to eat those vegetables. If you go all organic, it's going to be expensive."* Female, 45-54, Minnesota

> *"If you're on a budget, you have to decide which one would be the least offensive (food product) that you can get."* Male, Minnesota

Regarding willingness to pay more for humanely-raised animal products, females are more sympathetic than males and are more likely to agree to higher cost. In fact, 60% of those willing to pay more are women, compared with only 40% who are men. Those with more formal education are also more likely to be willing to pay more for humanely raised products, which at first blush may seem to be only related to the fact that those respondents also have higher household incomes and could afford to do so. Close examination of household income levels, however, suggests they have little or no bearing on this question. Finally, those who currently live with companion animals were more likely to agree that they would be willing to pay more for humanely-raised animal products. This finding also increased with the number of pets, with those having more companion animals also showing more willingness to pay for less inhumane food products.

VIII. Key Dietary Trends and Influences

Key trends and influences that impact food-related decisions include socio-cultural influences (including family and ethnic background), increasing health consciousness, skepticism of food-related information, and a major push toward greater convenience.

In the United States and elsewhere, the likelihood that people will adopt new attitudes or behavior is driven by a vast number of personal factors and external influences, many of which we have already discussed in this report. To fully understand the dietary behavior of U.S. adults, however, it is helpful to also examine a larger social and intellectual context in which people make food-related decisions. How do people's attitudes toward food develop? What overarching societal trends can we identify that shape the ongoing discussion about what people should eat? Where do people get their information to make food-related decisions, and what information most influences them to change? This report further explores the impact of these factors so vegetarian advocates can better understand the motivations and barriers to diet-related choices.

Based on both phases of research, the most prevalent overall food trends identified among the U.S. adult population appear to be the following. In the next sections we explore these and other key influences on dietary choices among adults in more detail.

- **Social and Cultural Influences:** Clearly, an individual's family, friends, and cultural affiliation all have a significant influence on many people's food choices. In different circumstances they can provide motivations to reduce meat, or serve as barriers against it, but in almost all cases one's social circle does have at least some impact. Successful approaches to vegetarian advocacy will need to address and possibly take advantage of these influential social relationships.
- **Health-Consciousness:** There is increasing health-consciousness when it comes to food choices, driven by a general desire to eat more healthfully, as well as specific health motivations for some people. This greater awareness is the impetus behind a number of more specific food trends, including a focus on fruits, vegetables, whole grains, non-processed, and organic food items. However, health-consciousness has not so far demonstrably resulted in fewer farmed animals (or a healthier population), and it has also spurred a number of meat-based fad diets.
- **Skepticism:** Along with greater health-consciousness, however, there also appears to be growing skepticism about food trends, including these fad diets or others considered "extreme." Specifically, there is skepticism of any diet that involves consuming large quantities of meat (e.g., with every meal) and consuming no animal products at all (i.e., veganism). The precipitous rise and fall of the Atkins diet has left many consumers with significant doubt about diets and the advice of health professionals when it comes to food choices.
- **Convenience:** In the U.S., there is ample evidence of increasing consumption of convenience foods, where convenience includes both ease of shopping and simple food preparation. People are eating out more frequently, and most people prefer to do all food shopping at one location unless there is a significant reason to go to multiple stores. This desire for convenience is important for vegetarian advocates particularly because of the widely held belief that plant-based foods are less available and more difficult to prepare.

SOCIAL AND CULTURAL INFLUENCES

The Phase Two research helped identify and gain a better understanding of a range of lifestyle factors that define an adult individual's diet in the U.S. While there are many factors that contribute to each person's specific dietary choices, there were several notable influences prevalent throughout the research. These included predominantly family-related matters, culture and lifestyle factors, and current living circumstances (these are distinct, but overlapping themes). These issues were covered to some extent in the previous discussion of motivations and barriers, but here we provide a more general overview of the influence of such factors.

FAMILY-RELATED MATTERS

One of the most significant influences on the U.S. adult diet appears to be family. Family dynamics can affect an individual's dietary preferences by shaping early notions of what is healthy eating and by reinforcing dietary habits. People tend to eat according to what they are accustomed, including specifically **learned eating behaviors from their parents and siblings**. These perceptions and attitudes toward food formed during childhood can vary significantly and therefore shape people's perceptions of food in different ways. For example, it was not unusual for older focus group participants to consider a traditional "balanced meal" one that includes meat, carbohydrates, and vegetables. Some specifically noted that this association comes from the meals they had eaten during their childhood. As an adult, this view continues to shape their thinking and influence their diet.

> *"I just go back to when I was at home. My mom always had a vegetable, a meat dish, and a carb… and maybe bread and a salad. I remember always thinking it was a well balanced meal."* Female, District of Columbia

> *"It goes back to how you were raised. Meat wasn't always on our plate. The beans were our meal if you had beans and rice. If you had grits and eggs, grits was the meal. If you start them early in terms of no meat or what's essential, that makes a difference."* Female, 35-44, Meat reducer, Texas

In particular, **parental role models** can be strong influences and the effects of parents' attitudes toward food can be long-lasting for their children. The dietary practices introduced during childhood are also often reinforced over time, because family reunions, holidays, and other celebrations typically feature food. Family also plays a major role as it relates to an individual's **marital or parental status**. If one spouse has a strong food preference or a medical condition that requires a specific diet, the other spouse is very likely to follow the same dietary regimen. This is due to both convenience (i.e., not having to cook multiple meals) and to support the rest of the family by setting a proper example. An individual's eating habits are similarly affected by the presence of children in the family, and many parents say they are willing to adopt a more healthful diet (however they define it) to set an example.

> *"I try to eat as much fruits and vegetables as I expect them to eat. I don't eat meat, but I'll grill some for them sometimes. I'm not a great cook; I'll cook a meatless thing and add veggies."* Female, 35-44, Semi-vegetarian, Minnesota

CULTURE AND LIFESTYLE FACTORS

Other factors that seem to play a pivotal role in defining the U.S. adult diet are culture and lifestyle, although people often commingle the notions of family, upbringing, and culture with one another. Certain dietary practices are deeply rooted as part of an individual's cultural background, and can be a major source of dietary influence. For example, a few participants specifically noted having an agricultural or farming-related upbringing. For these interviewees, traditional farm-based food products, including meat, are comfortably integrated into their diets. Several participants noted that their cultural backgrounds had significant influence over their adult diets and general perceptions about food. For example, one woman noted that vegetarianism would be a difficult choice because her African culture (she was from Ghana) tended to place significant importance on meat, and she thought that her fellow Africans would not understand.

> *"I'm African and meat is big in our diet. When you are among other Africans and you say you're vegetarian, they look at you like you're from Mars. To eat in that realm, it's hard according to my customs. If you try to bring friends to a restaurant that's geared more towards vegetarianism, they look at you like, are you speaking in English?"* Female, 25-34, District of Columbia

Similarly, one's dietary choices may be influenced by being from a lesser developed country, where in many cases the historical lack of animal food sources means that meat is culturally revered as a sign of wealth or status. The notion of vegetarianism or even significant meat reduction is potentially more challenging to instill in the segments of the U.S. adult population who are influenced by these other cultures. On the other hand, culture can have the opposite effect as well. Some cultures are more open to vegetarianism and this can be an inherent part of their philosophies. For example, people from India are often vegetarian because it is an integrated component of Indian culture and beliefs (e.g., Hinduism and Jainism). In some cases, it may in fact be the societal norm to practice a vegetarian lifestyle, with meat consumption sometimes discouraged in these cultures.

CURRENT LIVING CIRCUMSTANCES

Another social factor that impacts one's diet is his or her current living situation, including personal relationships such as roommates, close friends, and significant others. An individual's personal associations and current living circumstances can be a strong source of dietary influence. Depending on the specifics of the relationships and/or the circumstances, these influences may have short- or long-term effects. However, one need not live with a person for them to have an influence on one's dietary choices. In some cases, the influence of these personal associations is strong enough to have a noticeable effect on the person's dietary habits even when not living under the same roof. Similar to the discussion of family above, participants noted a tendency to modify their dietary habits when in the presence of a person with whom they have a personal relationship, but who practices different dietary habits. However, the influences can work in both directions, and typically the stronger influence seems to be the person with the more dominant personality or role in the relationship.

> *"I make my own choices. I was dating someone a year ago and I found I was eating like him more often with more meat. Now on my own, I eat less meat—maybe once a day, if that. If I hang out with someone a lot, I tend to eat like them."* Female, District of Columbia

Beyond these interpersonal relationships, an individual's own living **circumstances and immediate environment** can also play a significant role in defining one's diet. Participants noted that travel to regions where the dietary practices differ from the individual's usual regimen often necessitates adaptation to the local diet. While the ultimate long-term affects on the individual's diet can vary – typically depending on the circumstances and the length of exposure – this research shows that the changes often remain in place even after the extenuating circumstances have been removed (e.g., the person has returned from traveling abroad).

> *"My brother was vegetarian for a while. He lived in Korea for a while and most of the meals over there are meat. So he had to eat meat there or he'd starve. I don't know if he's vegetarian any more. I know people who have tried but can't stick with it."* Female, Kentucky

HEALTH CONSCIOUSNESS

The public's greater (self-reported) awareness of, and interest in, healthy eating is clearly one of the most significant factors regarding U.S. adult diets. This was confirmed by the Phase One survey data, in which more than three out of four U.S. adults (77%) say they would like to eat a healthier diet than they do now. Health has historically been – and continues to be – one of the key arguments in favor of vegetarianism. It may be helpful, therefore, to examine the definition of a healthy diet, or a "healthy meal," from the perspective of those who consume meat. Many of the responses shared similar themes, but the predominant concept running through all focus group sessions was the necessary inclusion of vegetables and/or fruit in a healthy meal. It was very clear that U.S. adults consider fresh fruit and vegetables to be necessary and important components of a healthy diet.

> *"I think you need everything, but you can exist on fruits/vegetables and fish if you had to. I think you definitely need those two (plants and fish) to exist."* Female, 35-44, Actual Meat Reducer, Kentucky

Also interesting and related to the overall issue of meat consumption were participants' divergent views concerning the **healthfulness of meat** as part of their diet. The majority of participants clearly consider meat products (particularly red meat) to be high in fat and cholesterol and therefore potentially unhealthy food choices. However, a much smaller number of participants did take the opposite view, considering even red meat to be a *healthy* food choice, typically describing it as a necessary source of protein and iron. Interestingly, a couple of participants who viewed meat as a healthy food choice included former vegetarians who, upon the advice of their doctors and for perceived health benefits, reintroduced meat into their diets. A few former vegetarians also said they had added a limited amount of meat to their diets when they became parents, in an effort to provide what they think is a more nutritious diet for their children.

> *"I know there are alternatives to protein, but there are some things that meat has that your body can't create, like biotin. I don't eat meat three meals a day. We may go two days without meat. We eat less meat than we used to, but it's still essential for us."* Female, 35-44, Semi-Vegetarian, Minnesota

The focus group participants also identified the mitigation or elimination of traditional **carbohydrates** as another notable component of a healthy diet. Although some participants continue to adhere to the traditional notion of what constitutes a healthy meal – including a source of meat, a vegetable and a bread or carbohydrate – many indicate that they no longer believed in this paradigm. According to those interviewed in Phase Two, current thinking no longer includes carbohydrates as a necessary part of a healthy diet. It is very likely that high profile weight loss diets, such as the Atkins and the South Beach Diets, have reinforced the idea that carbohydrates are not nutritionally necessary, although these sentiments are weaker than during the major periods of hype for those diets. Phase Two participants also mentioned several other health-related dietary factors or trends, including increased consumption of whole grains and less-processed foods, and greater attention to fat content.

> *"Healthy eating is something that makes a positive contribution to your diet that's more than empty calories and fat. You need fat, but you need a balance of good foods."* Female, Texas

> *"Healthy eating is eating low on the food chain with variety and balance, and foods that are in the natural state…When you eat processed foods, our bodies get lazy in processing them. That sets us up for the health concerns America is plagued with like Type II diabetes, or our pancreas doesn't work and it leads to other things."* Female, 25-34, Intended Meat Reducer, Kentucky

U.S. adults claim that they are attentive to low-fat eating with respect to both *what* they consume and *how* their food is prepared and cooked. For example, some focus group participants mentioned specifically avoiding fried foods in pursuit of a healthier diet. There was some association of high fat content with meat and other animal-derived products, but participants more frequently cited fat content as a general concern for all types of foods and during food preparation. Focus group participants also discussed how they would go about improving the healthfulness of their own diets. Overall, there were six notable **"healthier eating" trends** mentioned by participants as personal dietary goals. These included the following (in no particular order).

- More fruits and vegetables
- More chicken and fish in lieu of red meat
- More whole grains
- Less processed foods
- More organic foods
- More dairy products

Certainly, these discussions reflect the widely-held importance of fresh **fruit and vegetables** to the U.S. adult population. When individuals were asked which of the four traditional, USDA-defined food groups is most nutritionally important, participants overwhelmingly selected the fruit and vegetable group. Moreover, the increased consumption of fruits and vegetables was the single most frequently noted personal dietary goal for the upcoming year among all focus group participants, with increased consumption of whole grain products following closely behind. However, there is also a widespread, nearly unanimous belief that consuming chicken and fish is healthier than consuming red meat, and most believe that having some amount of animal "protein" is essential to a healthy diet.

Various participants considered each of the major food groups to be the most important, but some designated the **meat and dairy groups** as *least* important for a healthy diet. This reflects the varying perceptions that different people have of these two food groups in particular. Both hold prominent positions in the traditional USDA food pyramid, with meat believed to be a major source of protein and dairy believed to be a major source of calcium. However, recent media and consumer attention to the detrimental health effects of fat and cholesterol has also caused meat and dairy products to be viewed by some as contrary to a healthy diet. Conversely, the fruit, vegetable, and whole grain groups are viewed more consistently in a positive light; no participants considered these groups to be the least important, or detrimental to one's health, with the exception of excessive carbohydrates.

SOURCES OF FOOD-RELATED INFORMATION

Because perceptions of nutrition are often important considerations when making dietary choices, it is helpful to identify the sources that most people rely on for their nutritional advice and information. During the Phase Two research, participants discussed the sources that they look to for reliable health and nutritional information, and related advice. Participants indicated that they rely on a number of different sources for nutritional information, including both personal and media related sources, but as noted earlier there is also significant skepticism about dietary information in general.

HEALTHCARE PROFESSIONALS

On a personal level, participants mentioned both **doctors and nutritionists** as sources of information and influence regarding dietary choices. Participants generally seem to respect and trust the advice of doctors as it pertains to specific health or medical issues. However, doctors were not considered good advisors when it comes to nutritional matters, in part due to the lack of nutritional training for most general physicians. A number of Phase Two focus group participants mentioned that they believe doctors are not as informed or current with nutritional information as it relates to wellness issues and/or an individual's overall health. These people say they are more inclined to follow the advice of a professional with specific training in dietary issues, such as a nutritionist or dietician, suggesting that vegetarian advocates may have more impact working with specialists rather than general physicians.

> *"Doctor's have, I believe, less than 30 hours of nutritional training. I don't trust my doctor. The information he gets is usually from the sources I would go to. I'll go online and research things."* Female, 35-44, Minnesota

> *"Years ago, they had the fat free craze, but they jacked up the sugar. Now everything is low carb. And they have these effective carbs which is something that they made up. All they do is add the grams of fiber and subtract it from the total crabs and say those carbs vanished, but they still have calories. No wonder people are confused."* Female, Texas

At the same time, many individuals noted that they would not find credible *any* message given to them by a professional that advocated the **complete elimination** of any food item. Participants said that if a doctor or nutritionist recommended the complete elimination of an entire food group from their diet, they would be skeptical of this advice. This is consistent with the association of healthfulness with eating a "balanced" diet with a variety of foods. It also follows from the general human response to any personal change that is perceived to be "extreme," and it may have significant implications for anyone involved in vegetarian and/or vegan advocacy. To be credible, advocates should strive to position their messages using less extreme-sounding language or goals.

> *"I don't think a healthcare provider would tell you to cut something out of your diet, but to moderate it so you can have a healthier diet."* Female, Kentucky

> *"Trying to tell people to stop eating meat is too extreme. With that approach, people won't listen."* Male, 45-54, Texas

MEDIA SOURCES

Health and cooking magazines, internet sites such as WebMD and eDiets, and books were some of the other sources of nutritional information mentioned in the focus groups. Respondents expressed skepticism about health messages in the media because of the constantly changing coverage of different and opposing research studies. This frequently causes confusion among consumers and distrust of the media in general. For example, several people mentioned that the media used to portray eggs as detrimental to one's health for cholesterol reasons, but now the media portrays eggs as a healthy food choice, enriched with supplements such as omega-3 fatty acids. There were numerous examples provided for these types of contradictory messages from both the media and the medical establishment. Together, these cases and other experiences seem to have created or exacerbated skepticism and cynicism among U.S. adults about food-related health claims.

> *"I discount what I see in the media initially until I look into who's actually sponsoring the ad or show."* Female, Texas

> *"I research cross sections; I'll get points of views of vegetarians, organic farmers and the government. I'll find what makes the most sense to who I am. I think the internet has helped us understand. I think that's what's driving the organic market."* Female, 45-54, Minnesota

Some participants stated specifically that they do not trust health-related information that is sponsored either by the U.S. government or by any group perceived to have **ulterior motives**, such as the Beef Council, the Egg Board, or animal advocacy groups. Focus group participants were more likely to believe messages based on objective research or from academic sources due to credibility, and to rely on them for health-related information. Participants also obtain their information from books, a few of which seem to have been quite influential, especially among vegetarians (e.g., *Animal Liberation*). In more than one case, these books were catalysts for the individual's personal interest in animal and food issues, including ethical vegetarianism and veganism.

FOOD LABELS

Consumers use food labels as a source of information about both nutrition and, to a lesser extent, social issues, including animal and environmental welfare issues. The majority of research participants reported that they check **nutritional labeling and ingredient lists** on most or many packages prior to food purchases. Respondents most frequently check labels for calories and fat content, while sugar and sodium content were the next most frequently cited items of interest. The interest in fat and calories as part of a concern for weight bears a relationship to specific medical issues and to body image issues. Meanwhile, sugar and sodium are items more likely related to particular health concerns such as diabetes and high blood pressure.

> *"Big label reader. I did Weight Watchers and they calculate based on fat, fiber, and calories. So I compare the ratio of those three to each other. I also look at the first three ingredients. If it's sugar or a chemical, I'm less interested."* Female, 35-44, District of Columbia

Research participants also mentioned that some **animal- and environment-related food labels** are of interest, such as "dolphin safe" and "free range." There seems to be a significant segment of the population that is not opposed to consuming meat in general, but is concerned about the overall quality of life for the animals prior to slaughter (or "production," for milk and eggs). This segment pays more attention to labeling terms that relate to animals' living conditions, and they are significantly more willing to pay more for products from "humanely raised" animals. Most people appear to feel that consuming animals is a personal "right," but they also seem to have a genuine interest in ensuring that exercising that right does not result in any "unnecessary" suffering.

> *"I will pay the extra money knowing it's been handled or processed the right way. There are certain companies that know for the procedures they have with their animals. If I know it's made by them, I will buy the other product even if it costs more."* Female, 25-34, District of Columbia

Below is a list of specific items mentioned by research participants as those that interest them the most and that they actively seek out on food labels (in no particular order):

- Calories
- Fat
- Sugars
- Sodium
- Dolphin Safe
- General Nutritional Information
- Chemicals
- Carbohydrates
- Folic Acid
- Animal Friendly
- Serving Size
- Package Size
- Cost per Serving
- Ingredient List

IX. Additional Information

REPORT SHARING AND DISTRIBUTION

ADDITIONAL INFORMATION

In addition to this main report, purchasers of a "full report" license are also provided two separate appendix files that give detailed "cross-tab" results from the Phase One survey. Those who purchased a "base report" license must upgrade to a full report license to obtain the appendix files and the detailed discussion of results. All licensees are also welcome to request a copy of HRC's 2002 study of four focus groups in Seattle, Washington. If you need additional copies of any of the documents or have any questions about this report, the terms of its use, or the availability of additional information, please contact HRC at info@humaneresearch.org or 206-852-4848. You may also write to Humane Research Council, P.O. Box 70180, Seattle, WA 98127-0179.

HRC BACKGROUND

The Humane Research Council (HRC) was founded in early 2002 with the mission of empowering animal advocates with access to the information they need to maximize their effectiveness. We provide our clients and constituents with inexpensive and highly relevant research services, as well as centralized access to secondary and primary research data. HRC has managed major research studies on behalf of several national animal protection organizations. We are fortunate to count as our clients some of the largest and most successful animal protection groups in the United States.

For more about the Humane Research Council, our services, and our activities, please contact us directly or visit our website at http://www.humaneresearch.org/.