Animal Welfare Approved 2011 Animal Products Survey Results



Conducted by
Animal Welfare Approved
and East Carolina University's
Center for Sustainable Tourism

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Executive Summary

This survey emphasizes the need for clear and transparent product labeling to better educate, inform, and ultimately market toward the sustainably minded consumer. It also demonstrates a growing consumer preference for sustainably-raised animal products and estimated a willingness-to-pay that preference. Further, the study shows a strong link between visiting a sustainable farm and an increased loyalty to the farm's brand/products. For the purposes of this study, "sustainably-raised animal products" refers to products from animals that are raised outdoors, on pasture or range land, without the use of hormones or unnecessary antibiotics, and with a high standard of animal welfare and minimal environmental impact.

Survey results show a strong link between food labels and purchasing decisions. Even taking into account that respondents may inflate estimates of their own practices, there are a number of findings with the potential for positive economic impact. A majority of respondents stated that they would pay more for sustainably raised meat, dairy and eggs, but that these products were currently difficult to find in the chain grocery stores at which 60% of respondents shop. While the potential bias of respondents must be taken into account (the percentage of respondents that are white, female and suburban is higher than the national average), this represents an untapped market. Additionally, the results show a bias toward North Carolina residents (49.8% of sample).

Almost half of respondents reported they have sustainably raised animal products for 1-5 meals each week, and nearly all respondents said that clear labeling for animal products was 'important' or 'somewhat important' to increasing the production and consumption of sustainably raised meat. Over 91% of respondents report using label information (for example, organic, fair trade, local, etc.) when making a choice about buying products. This is especially interesting in conjunction with the lukewarm level of confidence in most food labels seen in the grocery store and suggests that increased transparency in food labels would result in higher purchasing of sustainable products.

Another economically relevant finding was that the majority of respondents reported a willingness to pay for a tour of a sustainable farm, and that the visit would increase their loyalty to the farm brand and increase their likelihood of purchasing similar products in the future. This could be a potential income stream for farms interested in agritourism.

Introduction

Animal Welfare Approved and the Center for Sustainable Tourism at East Carolina University collaborated to create a survey aimed at understanding preferences regarding the purchase of conventionally and sustainably raised animal products at home, while dining out and while traveling. The survey was conducted nationally through email listservs, social networking sites, and other forms of web-based advertising. The data was collected online and the results were analyzed after ten-week survey period in early 2011. The results allow researchers to develop a greater understanding of the sustainable food and beverage market, motivations for purchase, and eating preferences while traveling.

Results

A total of 1,867 people participated from around the U.S.; responses are presented here in the same order as the survey. The number and percentage of respondents are both reported; the number is represented as 'n.'

1. **Please select the option below that best describes your general consumption of animal products.**

The majority of respondents (39.7%) reported they eat most meats, but in limited portions; (38.2%) reported eating all types of meat regularly.

Table 1: Meat Consumption (n = 1,861)

Answers	Percent of responses
I eat most meats, but in limited portions	39.7%
I eat all types of meat regularly	38.2%
I am a lacto-ovo or ovo vegetarian (I eat dairy and/or eggs)	6.1%
I eat meat when I know where it comes from (fishing/ game/ hunting)	5.1%
I eat chicken and/or fish only (no beef or pork)	4.9%
I eat fish only	3.7%
I am vegan	1.9%
I eat according to a religious doctrine	0.2%
Other	0.2%

2. **Think about your typical breakfast, lunch and dinner. Please estimate how many meals that you eat each week which include: All meats (beef, chicken, pork, ground meats, deli meat, etc.), Seafood; Eggs; Dairy (milk, cheese, yogurt, ice cream), and soy or 'fake meat'-type products.**

The majority of respondents eat all meats, seafood, and eggs for 1-5 meals each week. Dairy is consumed for 6-10 meals a week and more than half of respondents do not consume any soy or 'fake meat' products.

Table 2. Meat Consumption during the Week

Answers	None	1-5 meals	6-10 meals	11-15 meals	16 or more meals	n
All meats (beef, chicken, pork, ground meats, deli meats, etc.)	13.3%	34.9%	30.2%	16.8%	4.8%	1,822
Seafood	20.2%	76.3%	3.1%	0.4%	0.1%	1,770
Eggs	5.3%	71.3%	19.5%	3.3%	0.6%	1,824
Dairy (milk, cheese, yogurt, ice cream)	4.1%	28.0%	35.9%	22.4%	9.5%	1,822
Soy or "fake meat"-type products	57.0%	34.1%	6.6%	1.6%	0.6%	1,706

3. Now please estimate how many servings you consume from producers who raise their animals outdoors/sustainably. (Throughout the survey, the term "sustainably-raised animal products" refers to products from animals that are raised outdoors, on pasture or range land, without the use of hormones or unnecessary antibiotics, and with a high standard of animal welfare and minimal environmental impact. "Unnecessary antibiotics" are those used when the animal is not sick, injured, or in need of them.)

Almost half of respondents reported they have sustainably raised animal products for 1-5 meals each week. However, a large percentage reported they never eat sustainably raised animal products (27.2% all meats, 19% eggs, and 25.3% dairy).

Table 3. Consumption of Sustainably Raised Animal Products

Answers	None	1-5 meals	6-10 meals	11-15 meals	16 or more meals	n
All meats (beef, chicken, pork, ground meats, deli meats, etc.)	27.2%	47.7%	15.5%	5.9%	3.9%	1,811
Eggs	19.0%	58.2%	15.7%	3.4%	3.8%	1,838

Dairy (milk, cheese, yogurt, ice cream)	25.3%	41.4%	20.9%	8.3%	4.0%	1,822

4. Please indicate the importance of the following attributes when you buy animal products (meat, dairy, eggs) in the GROCERY STORE.

Almost every attribute was rated as 'very important.' Most others were labeled as 'important.' Attributes that were rated 'very important' by the majority of respondents include taste, quality, food safety, how it affects my health, no added hormones, and no unnecessary antibiotics. Virtually no respondents reported that taste and quality were not important factors in their animal product decisions.

Table 4: Importance of Animal Product Attributes (n = 1,822)

	Very Important	Important	Somewhat Important	Not Important
Taste	**63.6%**	32.2%	3.5%	0.7%
Quality	**70.9%**	26.3%	2.3%	0.5%
U.S. origin	**47.3%**	30.0%	16.2%	6.4%
Local origin	**41.0%**	36.3%	18.3%	4.4%
Price	28.8%	**42.8%**	24.5%	3.9%
Food safety	**65.3%**	27.0%	6.3%	1.4%
How it affects my health	**59.1%**	31.0%	8.2%	1.7%
My knowledge of the farmer/ producer	29.1%	**30.2%**	27.1%	13.6%
Organic	29.2%	**33.5%**	24.8%	12.5%
Grass-fed	**38.5%**	30.4%	20.3%	10.8%
Pasture-raised	**44.5%**	28.9%	17.8%	8.8%
Natural	**39.4%**	31.2%	18.0%	11.4%
No added hormones	**62.0%**	21.7%	10.6%	5.7%
No unnecessary antibiotics	**62.3%**	21.6%	11.0%	5.1%
High standards of animal welfare	**49.8%**	30.2%	14.3%	5.7%

5. Next please indicate the importance of the same attributes when you buy animal products in a local restaurant or while traveling away from home.

The majority (49.1%) of respondents reported they sometimes look for the same attributes when eating out locally as when they are in the grocery store. Similarly, respondents (51.5%) reported when they are traveling they sometimes look for the same attributes as when they are at the grocery store.

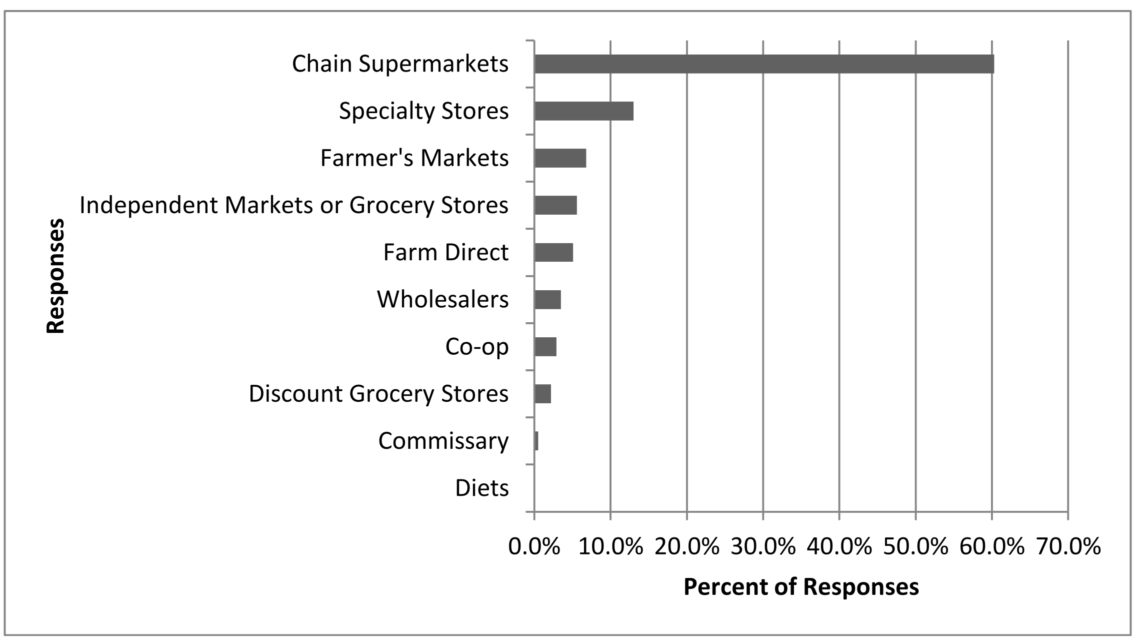
Table 5: Repetition of Purchasing Habits

	Always	Sometimes	Rarely	n
When I eat out locally, for the most part, I look for the same attributes as I do in the grocery store	41.9%	**49.1%**	8.9%	1,803
When I am traveling, for the most part, I look for the same attributes as I do in the grocery store	32.6%	**51.5%**	15.9%	1,791

6. At which stores do you primarily buy your groceries/meat products? (n = 4,284)

Respondents were asked to write in the three primary providers of their groceries. There were 4,284 responses to this question (respondents answered between zero and three times). Responses were then categorized into ten separate categories. Chain supermarkets (60.3%) such as Ingles, Kroger, and Food Lion were reported more than any other type of grocery provider. Specialty stores such as Green Life, Trader Joe's, and Whole Foods were mentioned for 13% of the responses, farmer's markets were 6.8% of responses, independent markets, corner markets, and grocery stores made up 5.6% of responses and respondents reported getting their meat products or vegetables direct from the farm (theirs or someone else's) for 5.1% of the responses. Other responses included wholesalers (Costco, BJ's, etc.) (3.5%), local co-ops (2.9%), discount grocery stores (Go Groceries, Save A Lot, etc.) (2.2), military commissaries (0.5%), and diet food providers (0.1%).

Figure 1: Grocery Providers (n = 4,284)



7. Do you belong to a CSA (Community-Supported Agriculture)? If you do belong to a CSA, does it offer animal products? (n = 1,746)

The majority (79.3%) of respondents reported they do not belong to a CSA. Of the respondents who do belong to a CSA, 13.7% belong to one that offers animal products.

Table 6: CSA Participation (n = 1,746)

Response	Percent of Responses
Yes, I belong to a CSA, which offers animal products	13.7%
Yes, I belong to a CSA but it does not offer animal products	6.9%
No, I do not belong to a CSA	79.3%

8. Below are average prices per pound/unit of a sample of animal products, according to USDA, for June 2010. The prices reflect products from animals that are conventionally raised. Please indicate HOW MUCH MORE you would be willing to pay per pound/unit to know that the animal was raised humanely, and without hormones and unnecessary antibiotics.

The majority of respondents reported they would be willing to pay $1-2 extra for meats, eggs, cheese, and milk if they knew the animal was raised humanely and without added hormones and unnecessary antibiotics. Other high percentages were within the $3-$4 range and $.50-$.99.

Table 7: Willingness to Pay Extra (n = 1,706)

Answers	No more	$.25-.49	$.50-.99	$1-2	$3-4	$5-6	$7-8	More than $8
Sirloin steak ($5.99)	13.1%	7.7%	14.1%	31.7%	19.6%	6.5%	3.1%	4.0%
Ground beef ($2.30)	10.4%	9.4%	18.1%	31.5%	20.8%	6.3%	1.5%	1.9%
Chicken breast, boneless ($3.45)	9.7%	9.5%	17.9%	34.5%	18.3%	5.9%	2.1%	2.1%
Pork chops ($3.30)	13.0%	9.3%	16.3%	31.7%	18.5%	6.9%	1.9%	2.3%
Turkey, whole ($1.30)	9.5%	10.2%	18.4%	31.8%	19.8%	5.3%	2.3%	2.7%
Eggs, dozen ($1.90)	7.9%	11.3%	19.0%	40.1%	17.4%	2.5%	0.8%	1.1%
Milk, gallon ($3.75)	11.0%	11.4%	20.1%	37.5%	13.7%	3.9%	1.0%	1.5%
Cheddar cheese ($4.40)	11.9%	12.8%	19.8%	33.6%	13.5%	4.4%	2.1%	1.8%
Roast beef deli meat ($9.99)	27.5%	9.0%	14.3%	29.0%	11.7%	3.5%	1.5%	3.5%

9. Please indicate your level of agreement/disagreement with each of the statements about food product labels.

The majority of respondents reported they use label information when buying animal products. Respondents also reported having purchased Animal Welfare Approved products and being familiar with AWA products.

Table 8: Label Use and Confidence

	Completely Agree	Somewhat Agree	Somewhat Disagree	Completely Disagree	n
I use label information (for example, organic, fair trade, local, etc.) when making a choice about buying products.	**59.2%**	31.9%	4.9%	4.0%	1,739
I use label information (for example, organic, cage free, grass-fed, etc.) when making a choice about buying animal products such as meat, dairy, and eggs.	**59.3%**	29.2%	5.8%	5.7%	1,735
As a consumer, I have confidence in the labels I see in grocery stores.	6.6%	**49.1%**	33.0%	11.3%	1,741
I have purchased Animal Welfare Approved products (see label image below).	**31.9%**	25.5%	18.1%	24.5%	1,693
I am familiar with Animal Welfare Approved (see label image below.)	**36.2%**	22.3%	15.9%	25.5%	1,738

10. Using a scale from 'Never' to 'Always,' please respond to the following.

This question was about how often respondents make certain decisions regarding food and travel. For the most part (39.8%) respondents only occasionally consider food while making a decision on where to take a vacation. However 37.5% of respondents often seek out special types of food experiences while traveling. About a third of the time (33.5%, 34.5%, and 33.4% respectively) respondents seek out special types of animal products, look for places that serve and sell animal products that were raised according to high standards of animal welfare, and look for places that serve and sell animal products that do not contain hormones and unnecessary antibiotics while traveling.

Table 9: Food Habits on Vacation (n = 1,684)

Answers	Never	Occasionally	Often	Always
How much does food play into your decision of where you take a vacation?	30.0%	39.8%	22.0%	8.2%
When you travel, do you seek out special types of food experiences?	3.2%	24.6%	37.5%	34.7%
When you travel, do you seek out special types of animal products (local, artisanal, heritage)?	16.1%	33.5%	29.9%	20.6%
When you travel, do you look for places that serve and sell animal products that were raised according to high standards of animal welfare?	26.6%	34.5%	26.7%	12.3%
When you travel, do you look for places that serve and sell animal products that do not contain hormones and unnecessary antibiotics?	24.5%	33.4%	28.1%	14.0%

11. Please indicate if you have done the following by checking Yes or No.

The majority of the respondents to this question have been to a food or beverage festival while traveling (59.4%), while only 18.7% have attended a sustainable food/beverage festival while traveling. Most respondents (56.4%) have not traveled specifically to attend a food or beverage festival or to attend a sustainable food or beverage festival (76.9%).

Table 10: Traveling for Food or Beverage Festivals

	Yes	No	n
Have you ever attended a food/beverage festival while traveling?	59.4%	31.7%	1,698
Have you ever traveled specifically to attend a food/beverage festival?	34.7%	56.4%	1,698
Have you ever attended a SUSTAINABLE food/beverage festival while traveling?	18.7%	72.3%	1,695
Have you ever traveled specifically to attend a SUSTAINABLE food/beverage festival?	13.5%	76.9%	1,685

12. How many times on average do you travel each year in the following contexts? Please estimate the average number of times per year.

The most frequent trip that respondents take is for a getaway (35.4% take a trip to get away 3-4 times a year) or travel with family (24.2% take a trip 3-4 times per year). Respondents who visit friends or relatives visit one (26%) or two (25.6%) time per year. Most types of business travel occurs only one or two times a year.

Table 11: Number of Vacations per Year

	None	1 time	2 times	3-4 times	5-10 times	More than 10 times	n
Vacation	9.0%	38.2%	31.3%	17.1%	3.7%	0.7%	1,664
Getaway	6.6%	13.2%	20.1%	35.4%	21.7%	3.0%	1,661
Travel with family	10.3%	23.1%	20.1%	24.2%	19.6%	2.7%	1,639
Travel with friends	31.7%	30.0%	17.5%	12.8%	7.1%	0.9%	1,605
VFR	8.1%	21.2%	26.0%	25.6%	16.2%	3.0%	1,655
Business - home state	40.0%	14.3%	12.5%	11.7%	13.3%	8.3%	1,637
Business - out of state	49.0%	19.3%	13.2%	9.3%	6.9%	2.2%	1,620
Business - international	86.3%	9.1%	2.9%	1.1%	0.5%	0.2%	1,592

13. When planning a trip or when traveling, which of following do you typically do? Please check all of the items that are typical parts of your travel. (Source: these items were adapted from The Ecotourism Society Tips for Travelers, National Geographic Sustainable Travel Tips, Friends of World Heritage Responsible Travel Pledge)

Most respondents (83.9%) reported they respect the natural environment by following designated trails. The second most indicated behavior was supporting conservation by paying entrance fees to parks and protected sites. Only 10.2% participate in carbon offset programs, 14.4% ask their lodging about environmental policies and practices and just 24.6% look for eco-ratings, labels, or certifications.

Table 13: Planning for Trips (n = 1,864)

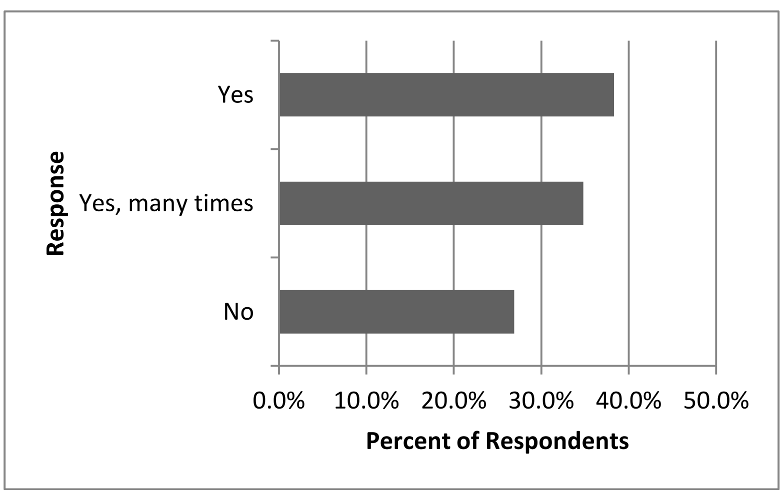
Response Choice	Percent of Responses
Respect the natural environment by following designated trails	83.9%
Support conservation by paying entrance fees to parks and protected sites	80.8%
Be respectful of restricted areas and visitor guidelines at heritage, cultural and sacred sites	78.8%

Choose locally owned businesses (lodges, hotels, and B&Bs, restaurants, guide services, markets, etc.)	66.0%
Choose organic and fair trade products when possible	65.2%
Refuse to buy crafts or products made from protected or endangered animals	64.9%
Conserve water and electricity when traveling	64.7%
Use public transportation	57.9%
Use websites or travel guides to look for recommendations on sustainable lodging, tourism or other companies	53.4%
Be sensitive to when and where you take photos of people/ ask first before taking photos	46.6%
Engage in activities that give back to the communities you visit	42.5%
Look for eco-ratings, labels or certifications	24.6%
Ask your lodging about environmental policies and practices	14.4%
Contribute to carbon offset programs	10.2%

14. Have you ever visited a farm that raises animals sustainably? (n = 1,687)

Almost three-fourths (73.1%) of respondents reported they had visited a sustainable farm and 34.8% reported having visited a farm many times.

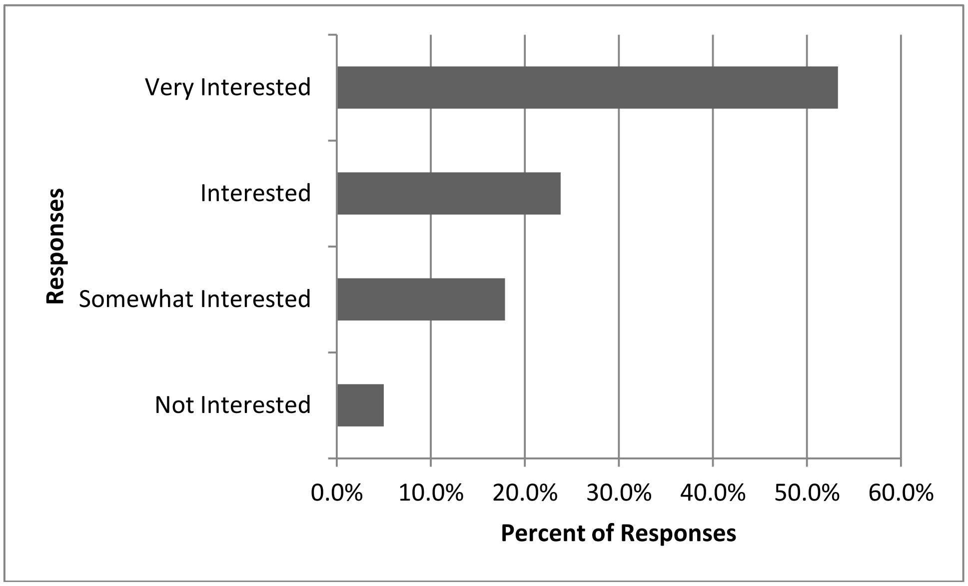
Figure 2: Farm Visitation (n = 1,687)



15. How interested would you be in visiting a farm that raises animals sustainably?

The majority (53.3%) reported they were very interested in visiting a farm that raises animals sustainably, 23.8% reported they were interested, 17.9% were only somewhat interested but only 5% reported they were not at all interested in visiting a farm that raises animals sustainably.

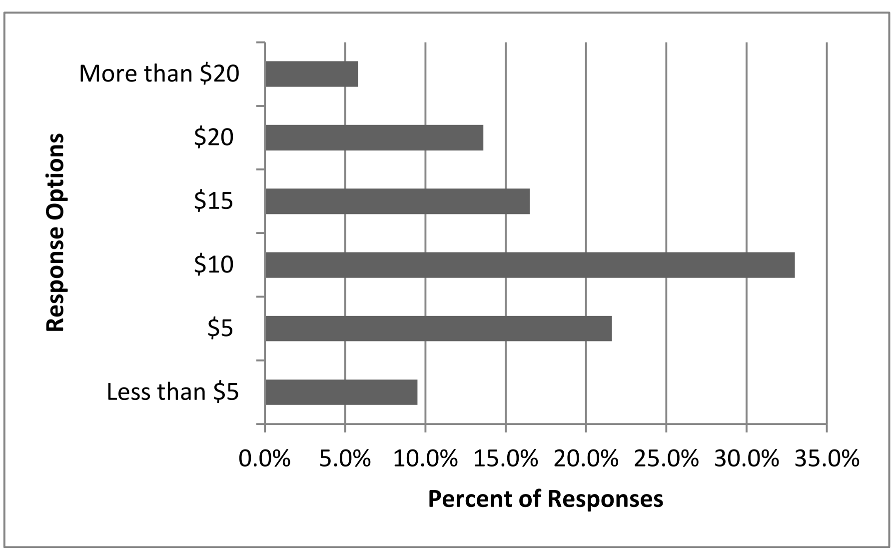
Figure 3: Interest in Visiting a Farm (n = 1,684)



16. What is the most you would be willing to pay per person for a two-hour tour of such a farm, including samples of products raised on the farm?

The majority of respondents (33%) reported they would be willing to pay $10 for a farm visit. However 16.5% reported they would be willing to pay $15, 13.6% reported they were willing to pay $20, and 5.8% reported they were willing to pay more than $20 to take a two hour tour of a sustainable farm.

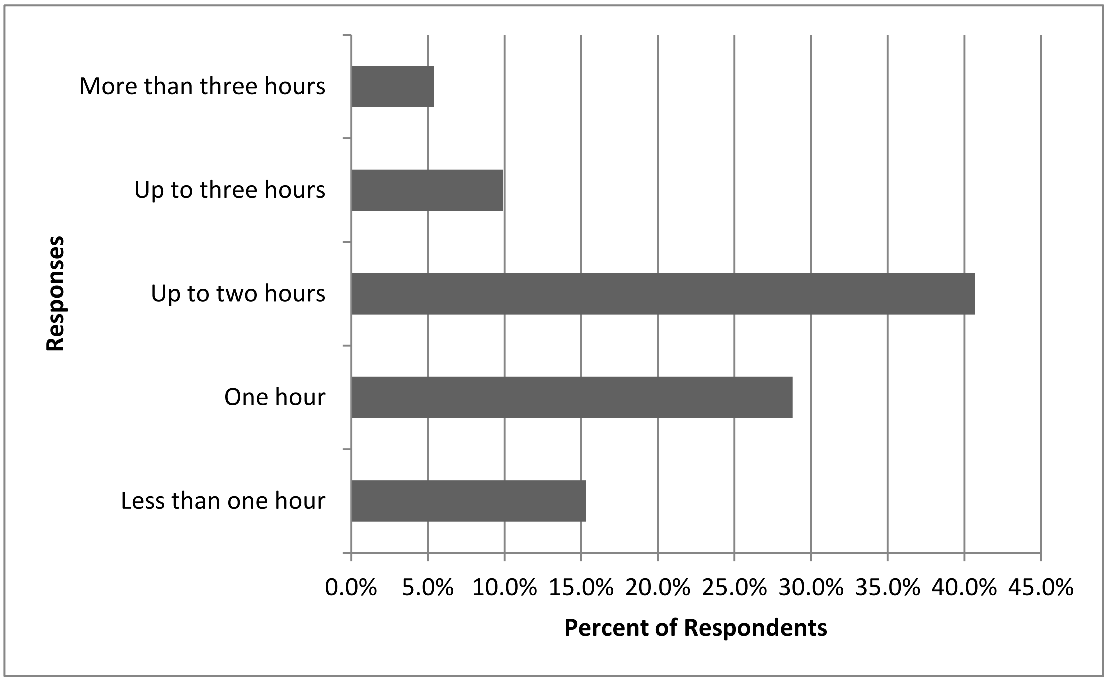
Figure 4: Willingness to pay for a Sustainable Farm Tour (n = 1,665)



17. How far would you travel from your home (on a day trip) to visit a farm that raises animals sustainably?? (n = 1,660)

While nearly ten percent (9.9%) reported they would travel up to three hours to visit a farm that raises animals sustainably, the majority of respondents (40.7%) reported they would travel up to two hours. Over one-fourth (28.8%) reported they would travel one hour to visit a farm.

Figure 5: Distance Willing to Travel (n = 1,660)



18. Do you think that a visit to a farm that raises animals sustainably would…

The majority of respondents reported that visiting a farm that raises animals sustainably would 'definitely' increase their loyalty to that farmer/ brand (54.2%), increase their likelihood of purchasing similar products in the future (54.1%), and strengthen a connection between them and their food (61.5%).

Table 14: Farm Visit and Loyalty

	Yes, definitely	Probably would	Probably would not	Definitely not	Not Sure	n

Increase your loyalty to that farmer/ brand?	54.2%	37.8%	3.9%	2.7%	1.3%	1,678
Increase your likelihood of purchasing similar products in the future?	54.1%	37.9%	4.1%	2.4%	1.5%	1,676
Strengthen a connection between you and your food?	61.5%	28.8%	5.3%	2.6%	1.8%	1,674

19. Please indicate your level of agreement/disagreement with each of the statements regarding the welfare of animals raised for meat, dairy, or eggs.

Almost all the respondents reported they either agree or strongly agree (89.2%) that refusing products that compromise animal welfare is a good way to change how animals are raised. Similarly almost all (90.9%) reported they either agree or strongly agree that an individual person can make a difference for animal welfare by carefully selecting the products they purchase and 91.9% either agreed or strongly agree that being deliberate about restaurant and meal selections when eating out can help shape the food service industry. Just over three quarters (78.7% and 74.4% respectively) of the respondents reported they either disagree or strongly disagree that one person alone can do very little for animal welfare and that efforts concerning animal welfare by one person are useless as long as other people do not want to do something. And finally, 61.8% of respondents reported they either disagree or strongly disagree that when they travel, they do not feel like their food choices influence the welfare of animals raised for meat/animal products.

Table 15: Level of Agreement Regarding Welfare of Animals

Answers	Strongly Agree	Agree	Disagree	Strongly Disagree	Not sure	n
One person alone can do very little for animal welfare.	3.6%	14.7%	46.0%	32.7%	3.0%	1,658
Refusing products that compromise animal welfare is a good way to change how animals are raised.	36.2%	53.0%	4.5%	2.8%	3.6%	1,656
An individual person can make a difference for animal welfare by carefully selecting the products they purchase.	37.3%	53.6%	4.3%	1.7%	3.1%	1,657
Efforts concerning animal welfare by one person are useless as long as other people do	3.8%	17.4%	47.7%	26.7%	4.4%	1,654

not want to do something.						
Being deliberate about restaurant and meal selections when eating out can help shape the food service industry.	35.8%	56.1%	3.4%	1.1%	3.6%	1,655
When I travel, I do not feel like my food choices influence the welfare of animals raised for meat/animal products.	3.5%	22.1%	45.3%	16.5%	12.6%	1,650

20. Please indicate your level of agreement/disagreement with each of the following statements regarding the nature of sustainably raised meat/animal products. Sustainably raised animal products are easy to find _______________. (n =)

For the most part, respondents reported they either agreed or strongly agreed that it is difficult to find sustainably raised meat/animal products while in grocery stores (78.1%), eating out (81.5%), and while traveling (81.2%). The majority of respondents (83.4%) reported that they either strongly agree or agree that sustainably raised animal products are easy to find in upscale grocery stores.

Table 16: Availability of Sustainably Raised Animal Products

Answers	Strongly Agree	Agree	Disagree	Strongly Disagree	Not sure	n
...in grocery stores (all stores)	2.2%	15.8%	48.8%	29.3%	3.9%	1,656
...in upscale or specialty grocery stores	23.5%	59.9%	10.6%	2.1%	3.9%	1,657
...when eating out	1.3%	13.3%	52.7%	28.8%	3.9%	1,657
...when traveling	1.1%	9.8%	52.4%	28.8%	8.0%	1,654

21. Sustainably raised animal products are __________ than conventionally raised animal products.

The majority of respondents reported they agree or strongly agree with the idea that sustainably raised animal products are healthier (89.6%), more nutritious (80.8%), better tasting (80.7%), more expensive (95.3%), better for the environment (93.8%), and safer (86.3%) than conventionally raised animal products.

Table 17: Sustainably Raised vs. Conventionally Raised Animal Products

Answers	Strongly Agree	Agree	Disagree	Strongly Disagree	Not sure	n
...healthier	57.2%	32.4%	3.8%	1.7%	4.8%	1,650
...more nutritious	48.0%	32.8%	7.9%	2.1%	9.3%	1,653

...better tasting	46.8%	33.9%	5.1%	2.1%	12.2%	1,654
...more expensive	48.6%	46.7%	2.9%	0.4%	1.3%	1,653
...better for the environment	67.3%	26.5%	1.9%	1.7%	2.6%	1,656
...safer	52.2%	34.1%	5.1%	2.0%	6.5%	1,654

22. I feel informed about the _______ issues surrounding the production of meat/animal products in the U.S.

The majority of respondents reported they agreed or strongly agreed that they feel informed about the environmental (79.9%), animal welfare (76%), and community/social (72.8%) issues surrounding the production of meat/animal products in the U.S.

Table 18: Informed about Sustainability Issues

Answers	Strongly Agree	Agree	Disagree	Strongly Disagree	n
...environmental	36.6%	43.3%	17.5%	2.5%	1,648
...animal welfare	33.1%	42.9%	21.0%	3.0%	1,645
...community/social	29.6%	43.2%	24.5%	2.7%	1,636

23. Please indicate the importance of each of the following in terms of increasing the production and consumption of sustainably raised meat.

For the most part, respondents reported that each of the following terms are 'very important' in terms of increasing the production and consumption of sustainably raised meats. Clear labeling for animal products (82.1%), education for consumers (86%), technical assistance for farmers that wish to convert to sustainable practices (82.4%), subsidies to keep sustainable products affordable (56.7%), additional processing facilities that adhere to sustainable practices (76.5%), and more marketing of products (59.1%) are all very important in terms of increasing the production and consumption of sustainably raised meat.

Table 19: Importance of Consumer Education

Answers	Very Important	Somewhat Important	Hardly Important	Not at all Important	Rating Average	n
Clear labeling for animal products	82.1%	16.4%	0.9%	0.6%	0.12	1,564
Education for consumers	86.0%	12.6%	0.9%	0.5%	1.16	1,583
Technical assistance for farmers that wish to convert to	82.4%	15.9%	1.2%	0.5%	1.20	1,564

sustainable practices						
Subsidies to keep sustainable products affordable	56.7%	28.5%	8.1%	6.7%	1.65	1,565
Additional processing facilities that adhere to sustainable practices	76.5%	20.7%	1.7%	1.1%	1.27	1,559
More marketing of products	59.1%	34.1%	4.9%	1.9%	1.50	1,557

24. Have you seen the following movies or read the following books?

The movies that most respondents reported have seen are *Supersize Me* (63.1%), *Food, Inc.* (56.5%) and *Fast Food Nation* (50.2%). The most commonly read books are *The Omnivore's Dilemma* (47.2%), *Animal, Vegetable, Miracle* (28.4%) and *Slow Food* (24.3%).

Table 20: Books and Movies

Answers	Yes	No	n
Food, Inc.	56.5%	43.5%	1,630
Fresh	18.3%	81.7%	1,571
Fast Food Nation	50.2%	49.8%	1,602
Supersize Me	63.1%	36.9%	1,609
King Corn	26.6%	73.4%	1,580
The Omnivore's Dilemma	47.9%	52.1%	1,613
Animal, Vegetable, Miracle	28.4%	71.6%	1,573
Slow Food	24.3%	75.7%	1,571
Animal Factory	7.9%	92.1%	1,534
Righteous Porkchop	3.7%	96.3%	1,533
The Compassionate Carnivore	3.8%	96.2%	1,530

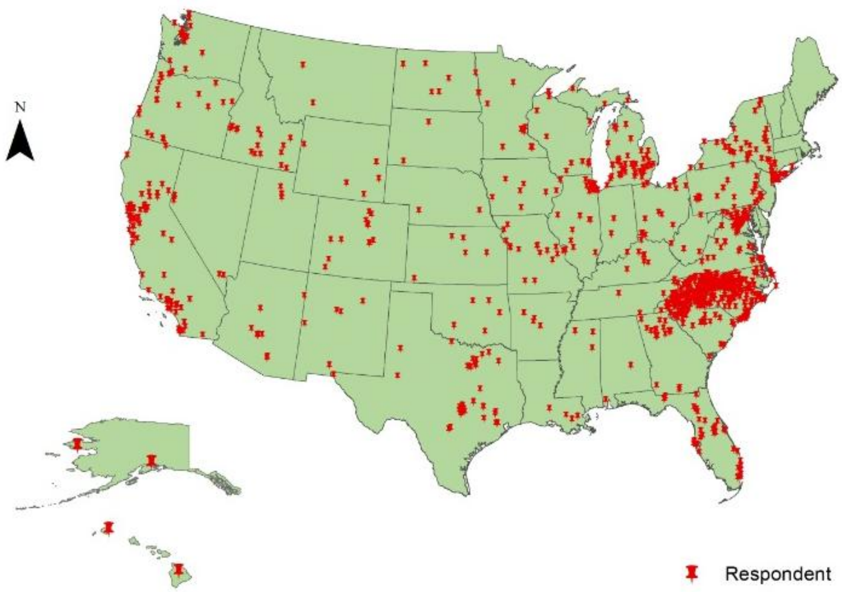
25. What is your zip code?

The survey originated in North Carolina, and distribution methods depended on a snowball/purposive technique. As a result, 808 respondents of 1,621 who supplied their zip code were from North Carolina.

Table 21: Respondent State of Origin (n=1,621)

State	Number of Respondents	State	Number of Respondents
AK	2	MS	3
AL	2	MT	2
AR	4	NC	808
AZ	10	ND	7
CA	85	NE	2
CO	13	NM	5
DC	35	NV	6
DE	2	NY	103
FL	45	OH	15
GA	20	OK	5
HI	2	OR	23
IA	8	PA	24
ID	17	SC	58
IL	23	SD	2
IN	5	TN	8
KS	5	TX	51
KY	12	UT	4
LA	4	VA	43
MD	26	WA	18
MI	61	WI	10
MN	12	WV	6
MO	20	WY	5
		TOTAL	1621

Figure 6. Spatial Representation of U.S. Respondents (n=1,621)



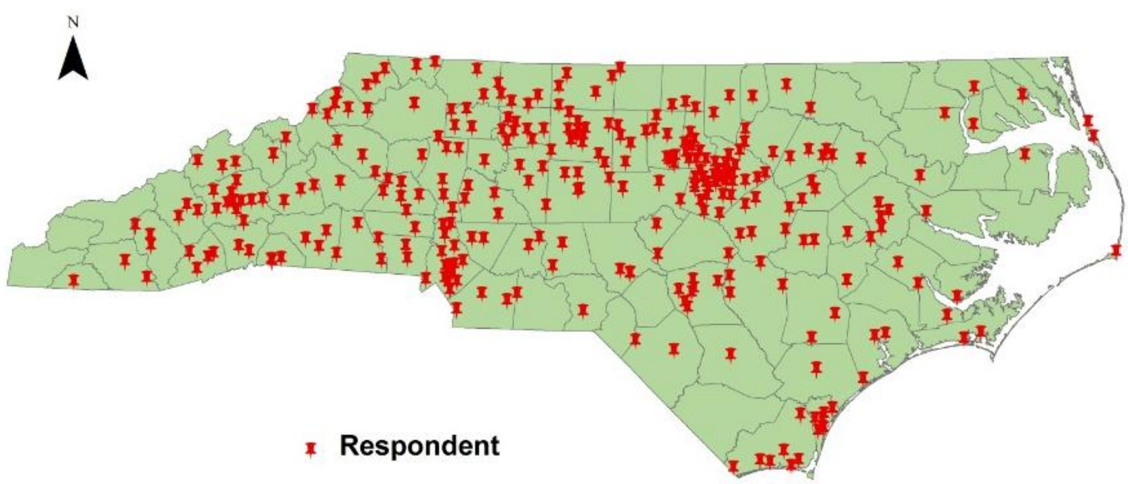
Within North Carolina, 40.7% of respondents were from the Research Triangle region (Durham, Wake and Orange Counties, n=327), another 6.1% from the Triad region (Forsyth and Guilford Counties, n=50), 5.9% from the Asheville area (Buncombe County, n=48), and 4.3% from Charlotte (Mecklenburg County, n=35). Chatham County, Pitt County and New Hanover County each represented around 2% of the sample. Western North Carolina, a region known for its buy-local philosophy and picturesque small farms, made up roughly 16.3% of the sample.

Table 22: County of Origin for North Carolina Respondents (n=808)

County	Number of Respondents	County	Number of Respondents	County	Number of Respondents
Alamance	9	Forsyth	26	Pamlico	1
Alexander	1	Franklin	4	Pasquotank	2
Alleghany	2	Gaston	4	Pender	3
Anson	1	Gates	1	Person	4
Ashe	3	Granville	2	Pitt	17
Avery	2	Greene	1	Polk	4
Beaufort	7	Guilford	24	Randolph	8
Bertie	1	Halifax	1	Richmond	1
Bladen	1	Harnett	2	Robeson	2
Brunswick	8	Haywood	4	Rockingham	10
Buncombe	48	Henderson	6	Rowan	7

Burke	2	Iredell	6	Rutherford	7
Cabarrus	6	Jackson	4	Sampson	4
Caldwell	4	Johnston	9	Stanly	2
Carteret	3	Lee	3	Stokes	11
Caswell	2	Lenoir	3	Surry	3
Catawba	7	Lincoln	1	Transylvania	6
Chatham	18	Macon	3	Tyrrell	1
Chowan	1	Madison	11	Union	4
Clay	1	Martin	1	Vance	1
Cleveland	5	McDowell	5	Wake	208
Craven	4	Mecklenburg	35	Warren	1
Cumberland	9	Mitchell	1	Watauga	12
Dare	3	Montgomery	4	Wayne	2
Davidson	6	Moore	3	Wilkes	1
Davie	2	Nash	5	Wilson	4
Duplin	2	New Hanover	19	Yadkin	6
Durham	62	Onslow	4	Yancey	2
Edgecombe	5	Orange	57	TOTAL	808

Figure 7. Spatial Representation of NC Respondents (n=808)



26. What is your gender? (n = 1,651)

Well over half of respondents (69.8%) were female and only 30.2% were male.

27. Please indicate the number of adults and children in your household.

The majority of respondents (60.7%) had two adults in their household, and 17.1% had one adult. Just under one third the respondents (30.5%) reported they had no children; another 44% did not respond, while 13.2% reported they have one child, and 8.7% had two children.

Table 23: Number of Adults and Children in the House (n = 1,864)

Answer	Adults	Children
None	NA	30.5%
One	17.1%	13.2%
Two	60.7%	8.7%
Three	7.2%	2.6%
Four	2.8%	0.6%
Five	0.3%	0.1%
Six	0.2%	0.0%
More than six	0.2%	0.2%
No response	11.8%	44.0%
Average number in household	2.0	0.8

28. How would you classify your primary form of work? Please check only one.

The majority of respondents reported they work in the public sector (31.8%), followed by 16.6% who own their own business, 13.7% who work in the non-profit sector, and 13.0% in the private sector.

Table 24: Primary Form of Work (n = 1,647)

Answers	Percentage
Public sector	31.8%
I have my own business	16.6%
Non-profit sector	13.7%
Private sector	13.0%
I am a student	9.2%
Unemployed - seeking paid work	4.1%
I am retired	4.0%
Unemployed - not seeking work	1.8%
Other (please elaborate)	5.8%

29. What is the year of your birth?

Nearly half of respondents (49.1%) were between 21 and 40 years old. Another 40% fell between the ages of 41 and 60.

Table 25: Age (n = 1,616)

Answer	Adults
18-20 years old	2.0%
21-30 years old	24.3%
31-40 years old	24.8%
41-50 years old	19.1%
51-60 years old	21.1%
61-70 years old	8.0%
71-80 years old	0.8%
81 or older	0.1%
Average age	41.4
Median age	40.0
Mode age	27.0

30. Of what race/ethnicity do you consider yourself? (n = 1,537)
Almost all respondents to this question are white/Caucasian (88.5%). Only 4.3% are Asian, 3% are Hispanic or Latino, 1.8% are mixed, 0.8% are African American, 0.5% are Jewish and 2.1% are another race or ethnicity not mentioned.

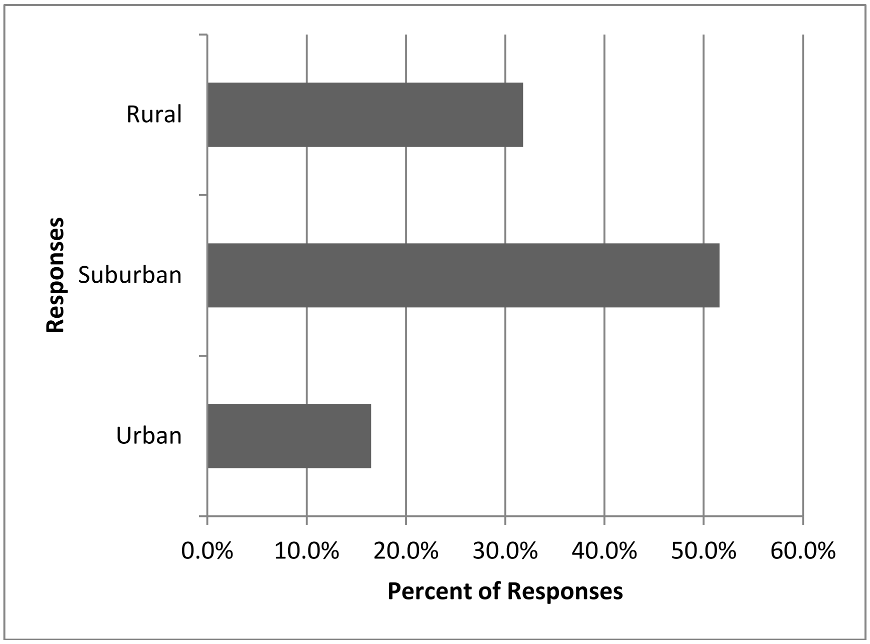
Table 26: Race/Ethnicity (n = 1,537)

Answer	Percent of Respondents
White/ Caucasian	88.5%
Asian	4.3%
Hispanic/Latina	2.0%
Mixed	1.8%
Black/ African American	0.8%
Jewish	0.5%
Other	2.1%

31. Were you primarily raised in an urban, suburban or rural setting? (n = 1,640)

Just over half of respondents (51.6%) reported they were primarily raised in a suburban environment, while 31.8% were primarily raised in a rural environment.

Figure 8: Childhood Setting (n = 1,640)



32. What level of education did you last complete?

Almost all of the respondents completed a four-year college or university degree (40.5%) or an advanced or professional degree (43.1%).

Table 27: Level of Education (n = 1,655)

Answers	Percent of Responses
High school	5.8%
Technical school	1.4%
Community college	6.0%
Four-year college or university	40.5%
Advanced or professional degree	43.1%
Culinary school	1.0%
Other	2.2%

33. What are your political leanings?

'Liberal' (34.7%) and 'Moderate Liberal' (22.6%) were the most frequently chosen responses. Other respondents reported they were independent (15.9%), moderate conservative (10.8%), conservative (8%), or libertarian (3.5%). Of the 1,617 respondents 4.6% reported their political leanings were 'other.' Their responses were generally explained as 'not affiliated' or 'no political leanings'.

Table 28: Political Leanings (n = 1,617)

Response Options	Percent of Responses
Liberal	34.7%
Moderate liberal	22.6%
Independent	15.9%
Moderate conservative	10.8%
Conservative	8.0%
Other	4.6%
Libertarian	3.5%

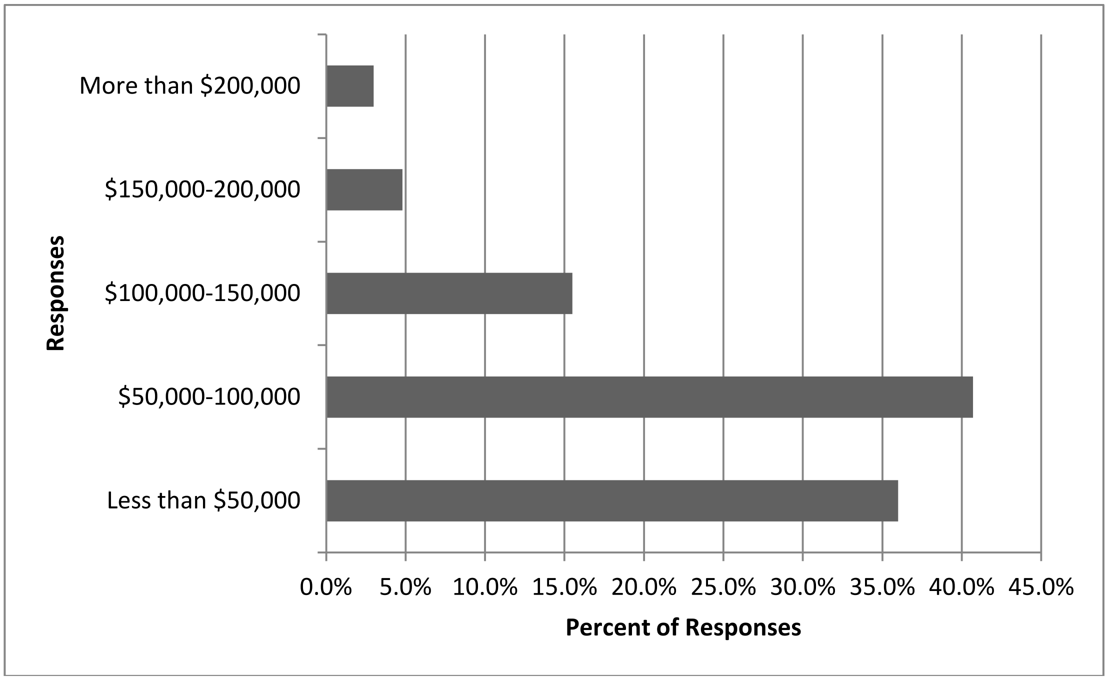
34. Many world religions have dietary guidelines. If you eat according to a religious doctrine, please indicate which one.

Of the 1,816 respondents, only 2.6% reported they eat according to a religious doctrine. The most common response was Catholics who do not eat meat during lent or do not eat meat on Fridays during lent.

35. What is your household income? (n = 1,576)

Most respondents to this question earn between $50,000 and $100,000 (40.7%) or less than $50,000 (36%). Other respondents reported earning between $100,000-$150,000 (15.5%), between $150,000-$200,000 (4.8%), and more than $200,000 (3%)

Figure 9: Household Income (n = 1,576)



Open Ended Summary

Just over 600 respondents provided additional comments. The most apparent theme that emerged was a divide among respondents over support for sustainably versus conventionally raised animal products. Several comments focused on personal experiences wherein respondents have witnessed local farms losing business because they are not considered (economically) sustainable. As one respondent noted "it has been my observation that 'sustainable' correlates with poor efficiency and only produces a product that is perceived to be superior, when in fact it's no different." Several commented that AWA standards are too stringent and in fact, deter farmers from participating in the program. Additionally, many respondents expressed concern over the greater cost, inconvenience, and impracticality of purchasing sustainably raised animal products. On the contrary, a great number of respondents reported taking steps toward changing their purchasing of animal products to reflect their commitment to sustainable techniques. A comment along this line noted, "for me it's simple, just change what you are doing. If everyone just changed how they eat or what they eat in terms of where it comes from and how the animals were treated, the abusive and unsafe food products business would die over night and sustainable kind and healthy food products business would immediately thrive." Other responses from supporters of sustainably raised animal products included comments stressing their commitment to sustainable food and farming. Several respondents offered personal anecdotes of their sustainable farming successes, and benefits of AWA certification.

Another frequently cited topic that emerged was related to the need for increased education and consumer awareness in terms of a number of different items pertaining to the purchase and consumption of sustainably raised animal products.

Many respondents stressed the importance of a broader dissemination of information to consumers, especially those consumers who may not have an immediate interest in the subject, but whose involvement would nonetheless create a greater demand. As an example, one respondent commented, “How to get these issues from the urban/wealthy community to other communities is THE issue right now.” Others noted that measures should be taken to demonstrate to the public that sustainably raised animal products should not be considered elitist, and that efforts to better inform a wider range of consumers would be beneficial in the long term. Respondents felt that increasing consumer education would make consumers feel good about purchasing AWA products, build support, and create a more thorough understanding of alternative methods. As it relates to consumer awareness, several respondents commented on the need for clear and systematic labeling of sustainably raised animal products, as this would clear confusion and assist in consumers making more informed choices.

AWA and ECU would like to acknowledge Ms. Beth Hauptle for her contributions to the survey.