

Buying Meat Fieldwork Dates: 9th - 12th November 2018

Conducted by YouGov On behalf of YouGov Omnibus

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BACKGROUND

This spreadsheet contains survey data collected and analysed by YouGov plc. No information contained within this spreadsheet may be published without the consent of YouGov Plc and the client named on the front cover.

Methodology: This survey has been conducted using an online interview administered to members of the YouGov Plc panel of 1.2 million individuals who have agreed to take part in surveys. Emails are sent to panellists selected at random from the base sample. The e-mail invites them to take part in a survey and provides a generic survey link. Once a panel member clicks on the link they are sent to the survey that they are most required for, according to the sample definition and quotas. (The sample definition could be "US adult population" or a subset such as "US adult females"). Invitations to surveys don't expire and respondents can be sent to any available survey. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is normally derived from census data or, if not available from the census, from industry accepted data.

YouGov plc make every effort to provide representative information. All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information.

For further information about the results in this spreadsheet, please contact YouGov Plc +1 888.729.0773 or email omnibus.us@yougov.com quoting the survey details

EDITOR'S NOTES - all press releases should contain the following information

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1278 adults. Fieldwork was undertaken between 9th - 12th November 2018. The survey was carried out online. The figures have been weighted and are representative of all US adults (aged 18+).

NOTE: All press releases or other publications must be checked by YouGov Plc before use. YouGov requires 48hours to check a press release unless otherwise agreed.

- YouGov is registered with the Information Commissioner
- YouGov is a member of the British Polling Council

Any percentages calculated on bases fewer than 50 respondents must not be reported as they do not represent a wide enough cross-section of the target population to be considered statistically reliable. These figures will be italicised.

US_nat Sample: 9th - 12th November 2018

Cold	YouGov What the world thinks		Ge	nder		Age			Reç	gion			R	lace		
## PARE -1 When you are brodge growth, out what extend 40 your care maken of your care growth for the september of the second protein or given between the first exploration for the growth your growth price as well as beginning to the second protein or given between the first exploration for the growth price and price or given between the first exploration and price or given between the growth price and price or given between the growth price or		Total	Male	Female	18 to 34	35 to 54	55+	Northeast	Midwest	South	West	White	Black	Hispanic	Other (NET)	No HS, High
The manufacture of the specifical from the foot by years, place sector the specifical segment. If you don't be years, place sector the specifical segment. If you don't be years, place sector the years, place sector the years, place sector the years, place sector the years. If you don't be years, place sector the years, years, place sector the years, years, years,			A	В	С	D	E	F	G	н	1	J	К	L	М	N
Compagnate from 175 500 770 500	more about price or quality? Please select the option that best applies. If you don't buy meat, please select the 'Not applicable'															
Town much more acting personal process of the computed more acting personal person		1278	569	709	342	435	501	225	266	532	255	893	146	155	84	471
Come anomatic more about price and quality requiry 45% 45% 45% 47% 57% 45%	Base: All US Adults	1267	626	641	386	413	468	230	250	524	262	838	149	198	82	532
Come somewhalm more about force 9% 10% 7% 12% 5% 5% 5% 5% 5% 5% 5%	I care much more about price	10%	11%	8%			6%	10%	9%		6%	8%		8%		12% P
Committed Comm	I care somewhat more about price	9%	10%	7%	12%		6%	7%	10%		9%	9%		9%	3%	7%
Care somewhat more about quality 13% 14% 12% 19% 19% 11% 12% 14% 12% 14% 12% 14% 17% 11% 11% 1.	I care about price and quality equally	46%	45%	47%		44%		48%	40%	44%		46%	38%			48%
Larse much more about quality 45% 14% 17	I care somewhat more about quality	13%	14%	12%	16%	13%		12%	13%	14%			11%		20%	P 11%
Not applicable—Lard Taby mase 4% 5% 4% 6% 5% 3% 3% 5% 6% 5% 3% 5% 6% 5% 3% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5%	I care much more about quality	16%	14%	17%	11%	17%	18%	14%	21%	15%	13%	_	17%	11%	_	14%
Don't brow 3% 3% 3% 6% 2% 1% 3% 3% 6% 2% 1% 3% 3% 2% 7% 4% 3% 3% 3% 5% 3% 5% 3% 3	Not applicable - I don't buy meat	4%	5%	4%	6%			5%		4%	4%	4%	2%	8%		4%
EBM_q2. How much, if at all, do you care about animal rights? Comparison Compa		30/.	30/	30/	69/	20/.		30/.	10/.	40/	30/.	20/.		J	*	5%
Base: All SAdults 1278 598 709 342 435 501 225 268 532 259 883 148 155 84 156 84 164		3/6	376	3/6		270	170	3/6	170		3/6	270		4/0		0.P
Base: Al US Adults 1287 626 641 386 413 488 220 250 524 262 838 149 188 62 1																
Lare e ac. 39% 29% 40% 31% 43% 39% 3																471
Care somewhat 39% 40% 38% 43% 337% 37% 42% 40% 36% 40% 41% 36% 35% 35% 36% 36% 37% 37% 42% 40% 36% 40% 41% 36% 35% 36%																532
I don't care very much 12% 18% 8% 14% 10% 11% 8% 13% 12% 13% 12% 5% 13% 20% 13% 12% 13% 12% 5% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 12% 13% 1	I care a lot	38%	29%		31%			38%	36%	39%	36%	37%	41%	38%	35%	41%
B 1 1 11 11 15 15 15 1	I care somewhat	39%	40%	38%	43%	37%	37%	42%	40%	36%	40%	41%	35%	35%	36%	34%
Idon't care at all 7%	I don't care very much	12%		8%	14%	10%	11%	8%	13%	12%	13%		5%	13%		10%
Don't know 5% 5% 5% 8% 8% 4% 4% 4% 4% 7% 5% 3% 13% 9% 4% C EM_q3. How often, if ever, do you check to see which company rocessed the meat that you buy? Unwelghted base 1227 548 679 324 418 485 215 253 515 244 862 143 144 78 483 218 296 505 253 807 146 112 77 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	I don't care at all	7%	11%	2%	4%	6%		8%	8%	6%	5%		5%	5%	4%	6%
EM_q.3. How often, if ever, do you check to see which company processed the meat that you buy? Unweighted base 1227 548 679 324 418 485 215 253 515 244 862 143 144 78 78 78 78 78 78 78	Don't know	5%		5%		4%		4%	4%	7%	5%	3%				9% O.P.Q
Unweighted base Base: US Adults Who Buy Meat 1217 548 679 324 418 485 215 253 515 244 862 143 144 78 Base: US Adults Who Buy Meat 1211 597 614 363 394 453 218 236 505 253 807 146 182 77 Always 11% 11% 11% 8% 13% 12% 13% 11% 13% 11% 13% 7% 10% 12% 14% 12% Often 17% 19% 15% 18% 17% 15% 14% 15% 16% 21% 18% 11% 11% 16% 20% Sometimes 24% 22% 26% 28% 21% 23% 17% 25% 25% 27% 23% 28% 24% 29% 2 % 2 % 2 % 2 % 2 % 2 % 2 % 2 % 2					D.E								J.IVI	J	_	U.P.Q
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Rarely 21% 22% 21% 20% 18% 24% 20% 24% 20% 21% 22% 21% 18% 17% 5	Often	17%	19%	15%	18%		15%	14%	15%		21%	18%	11%	16%		16%
Rarely 21% 22% 21% 20% 18% 24% 20% 24% 20% 21% 22% 21% 18% 17% 5	Sometimes	24%	22%	26%		21%	23%	17%	25%			23%	28%	24%	29%	24%
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C H.I Don't know 4% 3% 5% 8% 3% 2% 5% 2% 5% 4% 3% 8% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5% 5%	Never	23%	24%	22%	18%	28%		31%	23%	21%	19%	24%	20%	24%	17%	23%
EM_q4. If you heard that a certain company had a bad eputation for animal welfare, would it make you more or less						С		H.I								6%
eputation for animal welfare, would it make you more or less		770	570	370		570	270	0,0	270	070	7/0	3,0		0,0		P
	eputation for animal welfare, would it make you more or less															
hat best applies.																

US_nat Sample: 9th - 12th November 2018

YouGov What the world thinks		Educa	ation				Marita	al Status			Children und	er the age of 18		Inc	ome
	Total	Some college, 2- year	4-year	Post Grad	Married	Separated	Divorced	Widowed	Never married	Domestic / civil partnership	Yes	No	Under \$40k	\$40k to \$80k	
		0	Р	Q	R	s	Т	U	v	w	х	Y	Z	AA	Н
GEM_q1. When you are buying meat, to what extent do you care more about price or quality? Please select the option that best applies. If you don't buy meat, please select the 'Not applicable' option.															
Unweighted base	1278	428	247	132	607	29	142	73	363	64	365	913	502	327	
Base: All US Adults	1267	395	219	121	583	29	132	73	384	66	358	909	504	327	
I care much more about price	10%	9%	5%	8%	8%	11%	10%	4% *	11%	16% U*	15% Y	8%	12% AA	6%	
I care somewhat more about price	9%	9%	12% N	7%	8%	10%	6%	4%	12%	6%	8%	9%	11% AB.AC	10% AC	
I care about price and quality equally	46%	47%	40%	43%	47%	42%	53% V	64% R.V.W*	40%	39%	44%	46%	48%	48%	
I care somewhat more about quality	13%	13%	19% N.O	14%	16% T.U	6%	8%	5%	11%	20% T.U*	14%	13%	11%	14% AC	
I care much more about quality	16%	16%	18%	18%	16%	31%	15%	19%	14%	16%	15%	16%	12%	14%	
Not applicable - I don't buy meat	4%	4%	5%	8% N	3%	- **	5%	4% *	6% R	2%	4%	5%	4%	5%	
Don't know	3%	2%	1%	1%	2%	- **	2%	2%	5% R	*	1%	4% X	2%	2%	
GEM_q2. How much, if at all, do you care about animal rights?															
Unweighted base	1278	428	247	132	607	29	142	73	363	64	365	913	502	327	
Base: All US Adults	1267	395	219	121	583	29	132	73	384	66	358	909	504	327	
I care a lot	38%	37%	34%	32%	33%	48%	42%	43%	39%	49% R*	37%	38%	42% AB	35%	
I care somewhat	39%	42%	44%	43%	41%	50%	34%	33%	38%	38%	40%	39%	36%	41%	

GEM_q3. How often, if ever, do you check to see which company processed the meat that you buy?

I don't care very much

I don't care at all

Don't know

N

12%

5%

4%

P.Q

12%

5%

N

14%

8%

1%

13%

11%

0

1%

13%

8%

5%

2%

-

r, do you check to see which company ou buy?															
Unweighted base	1227	415	235	121	588	29	134	71	343	62	352	875	485	313	270
Base: US Adults Who Buy Meat	1211	380	207	111	563	29	125	70	359	65	344	867	486	311	254
Always	11%	13% P	7%	11%	12%	21%	10%	13%	10%	14%	13%	11%	13%	9%	12%
Often	17%	17%	20%	14%	17%	14%	13%	16% *	17%	17% *	17%	16%	16%	14%	18%
Sometimes	24%	21%	27%	29%	24%	32%	23%	26%	24%	23%	26%	23%	26%	22%	24%
Rarely	21%	21%	27% N	19%	22%	10%	27% V	19% *	18%	25%	19%	22%	18%	26% Z	21%
Never	23%	25%	19%	24%	22%	23%	23%	27%	25%	19% *	21%	24%	22%	26%	24%
Don't know	4%	4% P	0%	3% P	3%	- **	5%	-	6% U	2%	4%	4%	6% AB	3%	2%

15%

4%

5%

12%

8%

4%

9%

6%

7%

4%

3%

13%

6%

11%

7%

6%

10%

6%

6%

AB

14%

AC

5%

5%

AB

\$80k+

276 260 9%

43% 20% Z.AC 20% Z 2%

260 29% 43%

15%

Z.AC

11%

Z.AA

2%

GEM_q4. If you heard that a certain company had a bad reputation for animal welfare, would it make you more or less likely to buy meat processed by them? Please select the option that best applies.

Unweighted base	1227	415	235	121	588	29	134	71	343	62	352	875	485	313	270

US_nat Sample: 9th - 12th November 2018



		Buy M	fleat?
Total	Prefer not to say	Those who buy meat	Those who don't buy meat
	AC	AQ	AR

GEM_q1. When you are buying meat, to what extent do you care more about price or quality? Please select the option that best applies. If you don't buy meat, please select the 'Not applicable' option.

Unweighted base	1278	173	1227	51
Base: All US Adults	1267	176	1211	56
I care much more about price	10%	11%	10%	-
			AR	*
I care somewhat more about price	9%	3%	9%	-
			AR	*
I care about price and quality equally	46%	40%	48%	-
			AR	*
I care somewhat more about quality	13%	7%	14%	-
			AR	*
I care much more about quality	16%	22%	16%	-
		Z.AA	AR	*
Not applicable - I don't buy meat	4%	9%	-	100%
		Z.AB		AQ*
Don't know	3%	9%	3%	-
		Z.AA.AB		*

GEM_q2. How much, if at all, do you care about animal rights?

about unimum riginto.				
Unweighted base	1278	173	1227	51
Base: All US Adults	1267	176	1211	56
I care a lot	38%	42% AB	37%	46% *
I care somewhat	39%	35%	40%	25%
I don't care very much	12%	7%	12%	4% *
I don't care at all	7%	6%	7%	7% *
Don't know	5%	10%	5%	17%

 $\mbox{\rm GEM}_q3.$ How often, if ever, do you check to see which company processed the meat that you buy?

Juyr				
Unweighted base	1227	159	1227	-
Base: US Adults Who Buy Meat	1211	160	1211	-
Always	11%	12%	11%	-
				**
Often	17%	22%	17%	-
		AA		**
Sometimes	24%	21%	24%	-
				**
Rarely	21%	21%	21%	-
				**
Never	23%	19%	23%	-
				**
Don't know	4%	5%	4%	-
				**

GEM_q4. If you heard that a certain company had a bad reputation for animal welfare, would it make you more or less likely to buy meat processed by them? Please select the option that best applies.

Unweighted base	1227	159	1227	-

US_nat Sample: 9th - 12th November 2018



		Gender Age					Region								
	Total	Male	Female	18 to 34	35 to 54	55+	Northeast	Midwest	South	West	White	Black	Hispanic	Other (NET)	No HS, High school graduate
Base: US Adults Who Buy Meat	1211	597	614	363	394	453	218	236	505	253	807	146	182	77	513
Much more likely	7%	8%	5%	8%	7%	5%	8% G	3%	9% G.I	4%	5%	7%	14% J.M	4% *	8% P
Somewhat more likely	8%	8%	8%	14% D.E	6%	5%	7%	6%	8%	9%	6%	8%	13% J	13% J*	10% O
It would make no difference	14%	20% B	9%	15%	12%	16%	16%	19% H	12%	14%	15%	12%	12%	19%	15%
Somewhat less likely	24%	26%	22%	24%	23%	25%	20%	24%	24%	27%	26% K	18%	23%	16%	21%
Much less likely	39%	31%	47% A	29%	42% C	44% C	38%	42%	38%	38%	41%	34%	32%	39%	35%
Not sure	8%	7%	10%	11% E	10% E	5%	10%	6%	9%	8%	7%	20% J.L.M	6%	8%	11% P

GEM_q5. As you may or may not know, several companies (e.g., Beyond Meat, Impossible Foods, etc.) have introduced products intended to closely mimic ground beef burgers. Have you tried one of these products? Please select all that apply.

of these products? Please select all that apply.															
Unweighted base	1278	569	709	342	435	501	225	266	532	255	893	146	155	84	471
Base: All US Adults	1267	626	641	386	413	468	230	250	524	262	838	149	198	82	532
Yes, have purchased from a store and cooked at home	12%	13%	12%	18%	14%	6%	12%	12%	14%	11%	11%	9%	16%	19%	12%
				E	E									J.K*	
Yes, have tried at a restaurant	8%	9%	8%	14%	10%	2%	6%	9%	8%	10%	7%	7%	15%	11%	9%
				E	E								J.K		
Yes, have tried someplace else (e.g., at someone else's home)	4%	6%	2%	8%	4%	1%	5%	5%	4%	4%	4%	4%	6%	3%	4%
		В		D.E	E										
No, I have never tried	79%	77%	81%	68%	76%	91%	79%	80%	78%	80%	82%	81%	71%	69%	78%
					С	C.D					L.M	L.M			

Cell Contents (Column Percentages, Statistical Test Results), Statistics (Column Proportions, (95%): A/B, C/D/E, F/G/H/I, J/K/LM, N/O/P/Q, R/S/T/UN/W, X/Y, Z/AA/AB/AC, AD/AE/AF/AG/AH/AJ/AJ/AK/AL/AM/AN/AO/AP, AQ/AR, Minimum Base: 30 (**), Small Base: 100 (*))

US_nat Sample: 9th - 12th November 2018



		Educa	ation			Marital Status						er the age of 18	Income			
	Total	Some college, 2- year	4-year	Post Grad	Married	Separated	Divorced	Widowed	Never married	Domestic / civil partnership	Yes	No	Under \$40k	\$40k to \$80k	\$80k+	
Base: US Adults Who Buy Meat	1211	380	207	111	563	29	125	70	359	65	344	867	486	311	254	
Much more likely	7%	7%	4%	5%	7% V	12%	8%	6% *	4%	12% V*	10% Y	5%	8% AB	5%	4%	
Somewhat more likely	8%	5%	6%	8%	8%	22%	6%	9%	7%	5% *	10%	7%	9% AC	10% AC	6%	
It would make no difference	14%	14%	14%	14%	17%	3%	13%	9%	13%	12%	16%	14%	12%	13%	23% Z.AA.AC	
Somewhat less likely	24%	25%	30% N	24%	25% W	21%	21%	24%	26% W	12%	21%	25%	23%	25%	26%	
Much less likely	39%	41%	43% N	42%	36%	39%	41%	48%	38%	50% *	35%	40%	38%	41%	37%	
Not sure	8%	8%	4%	6%	6%	4%	11% R	4% *	12% R	10%	8%	8%	10% AB	7%	4%	

GEM_q5. As you may or may not know, several companies (e.g., Beyond Meat, Impossible Foods, etc.) have introduced products intended to closely mimic ground beef burgers. Have you tried one of these products? Please select all that apply.

of these products? Please select all that apply.															
Unweighted base	1278	428	247	132	607	29	142	73	363	64	365	913	502	327	276
Base: All US Adults	1267	395	219	121	583	29	132	73	384	66	358	909	504	327	260
Yes, have purchased from a store and cooked at home	12%	14%	12%	8%	12%	25%	8%	8%	13%	21%	18%	10%	15%	12%	12%
						**				T.U*	Y		AC		
Yes, have tried at a restaurant	8%	7%	8%	9%	9%	21%	3%	1%	10%	4%	11%	7%	9%	8%	7%
					T.U	**		*	T.U		Y				
Yes, have tried someplace else (e.g., at someone else's home)	4%	4%	3%	7%	4%	5%	3%	3%	6%	3%	5%	4%	5%	5%	3%
						**									
No, I have never tried	79%	78%	83%	78%	79%	60%	87%	88%	78%	75%	72%	82%	75%	79%	81%
						**	R.V	*				X			
E CONTRACTOR DE															

Cell Contents (Col

US_nat Sample: 9th - 12th November 2018



			Buy Meat?			
	Total	Prefer not to say	Those who buy meat	Those who don't buy meat		
Base: US Adults Who Buy Meat	1211	160	1211	-		
Much more likely	7%	11% AA.AB	7%	- **		
Somewhat more likely	8%	3%	8%	-		
It would make no difference	14%	11%	14%	- **		
Somewhat less likely	24%	22%	24%	-		
Much less likely	39%	39%	39%	- **		
Not sure	8%	14% AA.AB	8%	- **		

GEM_q5. As you may or may not know, several companies (e.g., Beyond Meat, Impossible Foods, etc.) have introduced products intended to closely mimic ground beef burgers. Have you tried one of these products? Please select all that apply.

these products? Please select all that apply.				
Unweighted base	1278	173	1227	51
Base: All US Adults	1267	176	1211	56
Yes, have purchased from a store and cooked at home	12%	6%	12%	33% AQ*
Yes, have tried at a restaurant	8%	7%	8%	14%
Yes, have tried someplace else (e.g., at someone else's home)	4%	2%	4%	6% *
No, I have never tried	79%	89% Z.AA.AB	80% AR	61%

Cell Contents (Col