### Welcome to our online survey on the topic of purchasing and consumption of meat!

You do not need any special knowledge for this survey. We are interested in your personal opinion on the subject. Please answer all questions honestly and truthfully.

The survey will take about 25 minutes.

The survey will be evaluated by the Thuenen Institute of Market Analysis, a research institute under the auspices of the German Federal Ministry of Food and Agriculture (BMEL). The Thuenen Institute of Market Analysis will not receive any data for the evaluation that can be linked to your person. The processing of personal data is subject to the General Data Protection Regulation (DSGVO).

Please click on "Continue" to start the survey.

1.	Do you consume meat?
	☐ Yes
	□ No
2.	How often do you consume pork?
	never
	☐ daily
	☐ 4-6 x per week
	□ 2-3 x per week
	☐ 1 x per week
	☐ 2-4 x per month
	☐ less than 2 x per month
	icas than 2 x per month
3.	Are you the one responsible for purchasing meat in your household?
3.	Are you the one responsible for purchasing meat in your household?  ☐ Yes
3.	
<b>3. 4.</b>	□ Yes □ No
	□ Yes
	☐ Yes ☐ No  How often do you purchase pork? ☐ never
	☐ Yes ☐ No  How often do you purchase pork? ☐ never ☐ daily
	☐ Yes ☐ No  How often do you purchase pork? ☐ never ☐ daily ☐ 4-6 x per week
	☐ Yes ☐ No  How often do you purchase pork? ☐ never ☐ daily
	☐ Yes ☐ No  How often do you purchase pork? ☐ never ☐ daily ☐ 4-6 x per week ☐ 2-3 x per week

٥.	which cuts do you consume most frequently? Please indicate up to three of your most frequently consumed
	cuts.
	□ pork loin
	□ pork chops
	$\square$ pork belly
	□ pork neck
	$\square$ tenderloin
	☐ front legs
	☐ trimmings
	□ ham
	$\square$ shoulder
	□ pork knuckle
	☐ minced pork
	$\square$ ribs
	Other:
6.	Do you consume mostly frozen or fresh meat?
	$\square$ fresh meat
	☐ frozen meat
7.	Which criteria are important for you when purchasing fresh, non-processed pork? (Keywords)
8.	Which criteria are important for you when purchasing frozen, non-processed pork? (Keywords)

In the following we would like to have your personal opinion on the statements listed below. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totally disagree	Disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Agree	Totally Agree	l don't know
Eating meat is socially accepted.								
My friends and family accept the								
consumption of meat.								
People who do not eat meat are								
healthier.								
I have bought more chicken than								
pork in recent years.								
I have bought more chicken in								
recent years due to health								
aspects.								
I do not want to associate meat								
with a living animal.								
I eat more meat out-of-home								
than at home.								
I eat meat because of its good								
taste.								
I have tried to cook dishes with								
less meat in recent years.								
For me, meat is part of a								
balanced diet.								

□ yes
 □ no
 Wenn ja, erscheint folgende Frage: What are the reasons for decreasing your meat consumption?
 □ negative impact on environment
 □ negative impact on health
 □ animal welfare issues
 □ increasing prices
 □ I no longer like the taste
 □ food scandals
 □ other: \_\_\_\_\_\_

My meat consumption has decreased over the last years.

In the following we would like to know how important the shown product characteristics are for you when you are buying pork. Please answer spontaneously and choose between "Not important at all" and "Very important" according to your personal opinion.

## Which product characteristics are important for your purchase decision when you want to buy pork?

	Not important at all	Not impor- tant	Slightly less impor- tant	Neutral	Slightly importa nt	Impor- tant	Very impor- tant
Price							
Expiry date							
Freshness							
Weight							
Product size							
Nutritional information							
Country of origin							
Animal husbandry conditions							
Quality							
Color							
Organic production							
No use of antibiotics/medication							
No use of additives							
Water addition							
Easy preparation							
Healthiness (health aspect)							
Food safety							
Packaging							
Taste							
Short delivery distance							
Regionality							
Environmentally friendly production							
Smell							
Brand							
Label/certifications							
CO <sub>2</sub> emissions							

In the following we would like to again have your personal opinion on the statements listed below. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totaller	Diegonas	Tond to	Noith	Torad	Agree	Totallia	1
	Totally	Disagree	Tend to	Neither	Tend	Agree	Totally	l don'+
	disagree		disagree	agree	to		Agree	don't know
				nor disagree	agree			KIIOW
The country of origin is my most				uisagiee				
important purchase criterion.								
I do not care about the country								
of origin of pork.								
Animal welfare is more								
important for me than the								
country of origin.								
If retailers promote a								
sustainable farming method, I								
would choose imported pork.								
I prefer domestically produced								
pork.								
I prefer domestically produced								
pork due to a shorter delivery								
distance.								
I prefer domestically produced								
pork because of the lower								
negative impact on the								
environment.								
I check the country of origin								
when purchasing pork.								
I care about the country of origin								
of pork when eating out-of-								
home.								
I try to avoid imported pork.								
Please choose the category "I								
don't know".								
Imported pork products should								
be cheaper than domestic pork								
products.								
Frozen imported pork products								
should be cheaper than fresh								
pork products.								
It is easy for me to recognize the								
country of origin when								
purchasing pork.								
I would not be reluctant to buy								
European pork products.								
Domestic pork is fresher								
compared to imported pork.								
When pork is imported, it must								
be of lower quality.								

Domestic pork products are				
safer products.				
To support my local community,				
I buy domestic pork products.				

**Please imagine the following situation:** You are in the supermarket and want to buy (among other things) pork belly. On the shelf you see different types of pork belly to choose from. These differ in various characteristics:

- Price
- Country of origin
- Animal welfare level

#### Please remark:

Animal welfare level 1 = lowest animal welfare level Animal welfare level 4 = highest animal welfare level

#### **Short information:**

Animal welfare is a term used to describe the health and well-being of farm animals. Animal welfare includes the aspects of physical health, the ability to perform natural behaviors and the emotional well-being of the animals.

On the following pages, you are faced with a decision between two products and are asked to make a choice. It is important that you imagine that you are shopping with the budget that you normally have available. If you decide to buy one product, you will have correspondingly less money available for other things. However, you also have the option to choose neither alternative if you do not find either product appealing. The price indicated refers to **1 kg** of pork belly. Please note that packages in the supermarket often have a lower weight.

To select the desired alternative, please click first on the corresponding alternative and then on "Next".

Please choose the product you would like to buy, considering your actual budget.

	Alternative 1	Alternative 2	Alternative 3
Price	337	289	
Country of origin	Germany	Canada	I choose neither
Husbandry System	Animal Welfare	Animal Welfare	of the two
	Grade 3	Grade 2	alternatives.
Condition	frozen	chilled	
I choose			

In the following we would like to have your personal assessment of the statements. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion.

	Totally disagree	Disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Agree	Totally Agree
Thinking about pig farming evokes positive feelings in me.							
I know a lot about pig farming.							
I know nothing about animal welfare.							
I have never heard the term animal welfare.							
I have negative associations with livestock farming.							
I am not interested in livestock production.							
I am only interested in the final product on my plate.							
I regularly use the media to inform myself about meat production.							
I visit farms to inform myself about livestock production.							

You will now receive some information on animal welfare. Please look at this information in detail!

	Animal welfare level 1	Animal welfare level 2	Animal welfare level 3	Animal welfare level 4
	0,75 m²	0,825 m²	1,05 m <sup>2</sup> No GMO	1,5 m <sup>2</sup> No GMO
Space per animal	0.75 m <sup>2</sup>	0.825 m² (at least 10 % more)	1.05 m² (at least 40 % more)	1.5 m² (at least 100 % more)
Housing	indoor	indoor	with outdoor climate stimuli; at least open-front stall	outdoor access
Manipulable material	Organic, raw fiber-rich	Organic, raw fiber-rich + additional roughage	Organic, raw fiber-rich + straw or comparable material	Organic, raw fiber-rich, straw or comparable substrates
Feed without GMO	-	-	х	х

#### Again, please imagine the following situation:

After receiving some information about animal welfare and the various animal welfare levels, you will also make hypothetical purchasing decisions for products on the following pages. It is important again that you imagine that you are shopping with the budget that you normally have available. If you decide to buy one product, you will have correspondingly less money available for other things. If none of the products shown suit you, you can also choose neither of the two alternatives. The price indicated again refers to 1 kg of pork belly.

To select the desired alternative, please click first on the corresponding alternative and then on "Next".

#### Please choose the product you would like to buy, considering your actual budget.

	Alternative 1	Alternative 2	Alternative 3
Price	337	289	
Country of origin	Germany	Canada	I choose neither
Husbandry System	Animal Welfare	Animal Welfare	of the two
	Grade 3	Grade 2	alternatives.
Condition	frozen	chilled	
I choose			

Once again, we would like to have your personal opinion on the following statements. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totally	Disagree	Tend to	Neither	Tend	Agree	Totally	I don't know
	disagree		disagree	agree	to		Agree	
				nor disagree	agree			
Animal welfare of pigs				uisagiee				
is very important for								
me.								
I think pigs should be								
treated better than								
they are nowadays.								
Pigs in conventional								
livestock production								
systems feel								
comfortable.								
Pigs can show their								
natural innate								
behavior in								
conventional livestock								
production systems.								
Please choose the								
category "Tend to								
agree".								
Pigs from organic								
production had a								
better life than in								
conventional								
production.								
The health status of								
conventionally kept								
pigs is not								
objectionable.								
Pigs feel more								
comfortable on farms								
with a small stock size than on farms with a								
large stock size. Since one person has								
no influence on								
'								
protected.								
improving animal husbandry of pigs, my actions make no difference.  My understanding of animal welfare implies that pigs are								

Here we would like to again have your personal opinion on the following statements. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totally disagree	Disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Agree	Totally Agree	l don't know
Meat from animals kept under improved husbandry conditions is of better quality than meat from conventionally kept animals.  Meat from animals kept under improved husbandry conditions tastes better than meat from				disagree				
conventionally kept animals.  Meat from animals kept under improved husbandry conditions is healthier than meat from conventionally kept animals.  A longer fattening period								
positively affects meat quality.  Stress negatively affects meat quality.  The feed impacts the taste and								
the quality.  Meat from animals that grow up in a clean environment taste good.								
I am willing to pay more if the quality of meat is better.  I am willing to pay more if the animals are raised in improved								
husbandry conditions.  I am willing to pay more if the quality of meat is better due to improved animal husbandry conditions.								

Hereafter, we would once again like to have your personal opinion regarding the statements. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totally	Disagree	Tend to	Neither	Tend	Agree	Totally	ı
	disagree	Disagree	disagree		to	Agree	Agree	don't
	uisagree		uisagree	agree			Agree	know
				nor	agree			KIIOW
Cormon park is of high quality				disagree				
German pork is of high quality.								
I would never buy German pork.								
I would prefer to buy German								
pork from improved husbandry								
conditions instead of buying								
domestic pork from								
conventional husbandry.								
Germany is a reliable country								
when it comes to food								
production.								
Regulations implemented by the								
German government are more								
trustworthy than regulations in								
South Korea.								
Controls of legal requirements								
are stricter in Germany than in								
South Korea.								
German products are								
characterized by a lot of								
additives.								
I would not purposely buy								
German pork.								
I would buy German pork if it is								
chilled.								
If German pork products are								
promoted well, they will be								
competitive with other imported								
pork products.								
Germany has a positive image,								
so it would be worthwhile to try								
German pork.								
I would choose German pork if								
the price was lower.								
I would choose German pork if								
the quality was better.								

In the following we would like to have your personal assessment of the statements. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totally disagree	Disagree	Tend to disagree	Neither agree nor disagree	Tend to Agree	Agree	Totally agree	I don't know
Labels have no effect on my purchasing behavior.								
Products with a label are of higher quality.								
I find labels very useful for identifying specific products (e.g. regionality, animal welfare).								
Please choose the category "Disagree".								
I have more trust in domestic labels than in international ones.								
I trust an animal welfare label coming from Germany.								
I would prefer a uniform (EU) animal welfare label.								

۷h	o would you trust the most as an initiator of an animal welfare label? Please rank the following options.
	☐ EU Government
	☐ German Government
	☐ South Korean Government
	☐ Supermarket
	☐ Discounter
	☐ Animal welfare organization
	☐ Consumer association

In the following we would like to have your personal assessment of the statements. Please choose between "Totally disagree" and "Totally agree" according to your personal opinion. Please answer spontaneously. There are no right or wrong answers.

	Totally disagree	Disagree	Tend to disagree	Neither agree	Tend to	Agree	Totally Agree	l don't
				nor	agree			know
				disagree				
I can get information about the								
animals' husbandry conditions on								
the product packaging.								
I would like to be more informed								
about the conditions under which								
pigs are farmed.								
Information about husbandry								
conditions has no effect on my								
purchasing decision.								
I use online-based media to get								
information about pork								
production.								
Governmental supported								
marketing strategies affect my								
purchasing decision.								

# Sociodemographic Data

1.	Do you own animals?							
	□ Yes							
	□ No							
2.	Please indicate what kind of animals you currently own. (Multiple answers possible)							
	□ Dog							
	□ Cat							
	☐ Equine (e.g. horse, donkey)							
	<ul> <li>□ Small animals (e.g. ferret, rabbit, guinea pig, hamster, rat, mouse)</li> <li>□ Fish (aquarium or pond fish)</li> <li>□ Reptiles (e.g. snake, turtle, bearded dragon)</li> <li>□ Amphibians (e.g. frog, toad, newt)</li> </ul>							
	Ornamental birds (e.g. canary bird, parrot)							
	☐ Birds (e.g. chicken, duck, geese, pigeon)							
	☐ Large mammals (e.g. pig, sheep, goat, cattle)							
	☐ Arthropods like insects, arachnids etc. (e.g. bees, spider, scorpion, crab)							
	□ Others:							
How ma	any people live in your household?							
	□ 3							
	_ · □ 5							
	☐ more than 5							
What is	your yearly net household income?							
	□ lower							
	□ +/- 10% 29,050,060 Won							
	□ higher							
	⊔ nigher							
Thank y	ou for your participation!							
The sur	vey is now completed. If you have any questions or comments about the survey, please feel free to contact:							
Rebecca	a Derstappen							
Thünen	Institute of Market Analysis							
Bundes	allee 63							
38116 E	Braunschweig							
E-Mail:	rebecca.derstappen@thuenen.de							

www.thuenen.de