

**Guiltless Not Meatless:
Consumer Preferences for Pasture Raised Animal Products**

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Abstract

Consumer food choices are motivated by several factors including knowledge and awareness, values, preferences and other personal and external influences. Growth in the marketing of pasture-raised meat, poultry and dairy products arises from needs and concerns within the agriculture sector as well as interests on the part of consumers. Consumer purchase of pasture-raised animal products may reflect an interest in personal and family health, concerns about the treatment of farm animals and the environment, an increasing awareness of the social dimensions of the agriculture and food system, or a combination of these issues.

Editors Note:

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The topic I have been asked to discuss is consumer preference for Pasture-Raised Animal Products. I will first provide an overview of some demographic changes and how marketers in general segment the population and then review some research conducted on consumer interest in pasture-raised meat and other animal products. I want to acknowledge at the outset that those of you producing pasture raised animals and doing some on-the-ground market research probably have a lot more in-depth stories to tell about consumers and how they feel. So I will give an overview based on some of the studies that I reviewed for this presentation with the aim of adding to a discussion we may have here about the best ways to develop messages to increase the preference among consumers for pasture raised animal products.

Push and Pull in the Market

- Market Push
 - Farmers expressing values in pastured production systems
- Market Pull
 - Consumers expressing values in seeking products from these systems.

The development of the market for these products is resulting from both a “push” and a “pull” in the market for pasture raised animal products. The “push” can be seen as coming from farmers who are expressing a set of values for a different way of raising foods that are the fruits of an overall farm management plan that is consistent with a lifestyle they want to have. They are expressing these values in raising pasture raised animal products or using that management system.

But there is also a market “pull” that is going on for a variety of reasons, and a variety of consumer interests. Consumers are expressing values – such as health, environment, animal welfare, and local food systems – in their preference for pasture raised animal products. Both sets of factors – those providing the push and those providing the pull – are seeing pasture raised systems as an alternative to what’s been increasingly known as an “industrialized” livestock production system. People are seeing this as factory farming, and that there are many negative aspects.

To start looking at how marketers view the population, I will talk a little bit about my generation, the Baby Boomer generation. I know that you are all pretty familiar with some of this. This segment of the population, this cohort represents about 80 million people ages 40 to 58 right now. Today in the U.S. over 50% of the population, which is over 70 million Americans, are over the age of 50. By the year 2015, that number will grow to about 108 million. The leading edge of this group is going to be over 65. Why is this important? There is a lot of wealth in this cohort. And as people age, they tend to be more concerned about their health. So when we are looking at specialized products this has significance. This cohort is also opting to work into their later years so wealth is probably going to increase in this segment of the population.

Baby Boomers

78 million b. 1946-1964 (aged 40 to 58)

- Today there are more than 70 million Americans over the age of 50.
- By 2015, that number will grow to 108 million “...and the leading edge will be over 65.”
- Americans over 50 “control 67 percent of America’s wealth, or \$28 trillion.”
-US Census Bureau via London Times 2004
- A third of Boomers appear to be headed toward appending an extra term of work rather than opting for early retirement.

-American Demographics 2004

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Generation X
41 million b. 1965 -1976 (aged 28 to 39)

- 56 % 30 to 39 year-olds are married couples compared with 60 percent a decade ago.
- Two-thirds of these married couples are both in the workforce, full-time, year-round.
- The average income of married-couple Gen X households is about \$78,000 a year.
- Concerned about their job being outsourced or how they are going to pay for their child's education due to wages rising slowly.

Following on the heels of the Baby Boomers is what is called Generation X. This is a group of people ages 28 to 39 who grew up in a very different kind of world. These are kids who grew up in households where there were a lot of divorces and both parents working. As children, Gen-Xers would often come home to an empty house, a new term, "latchkey kids," started to be used to describe them. Several traits are associated with people in Generation X. They are very independent, have a

high degree of resilience, have a high degree of adaptability, and their rate of marriage is much lower than the generation before them. Often times both parties of the couple will be working full time, and working all year round. One of the things that might have relevance for pasture raised animal products or for local food is that within this population segment there is a high degree of concern about outsourcing of jobs. They are very conscious of their job security. That may translate into some latent or active interest in supporting local producers of all sorts of things including food.

The next cohort is Generation Y, or the "Millennials". These are the 80 million people born between 1982 and 1995. They are between 9 and 22 years of age. They are just entering their professional lives. I am at Cornell University so I'm seeing the upper part of this cohort. This is a group that is just entering college. For many people the college experience is one where they are making food choices more independently than they have in the past. They are not so influenced by the preferences and eating patterns of the family. This may be an opportunity in terms of introducing new kinds of concepts and new kinds of characteristics or attributes related to food, that they might not have experienced at home. This is a group that was born in the most child centric time in our history. They are very technologically savvy, so in terms of marketing, use of technology would really work with this group. They don't have problems with things like instant messaging, which I still don't quite get. So these people spent large amounts of time online, use this as a way to market products to this age group. They use a lot more different kinds of media sources, or informational sources, than the cohorts that preceded them.

**Generation Y,
Echo Boomers, Millennials**
80 million b. 1982-1995 (aged 9-22)

- One-third the population, already spend \$170 million of their own and their parents' money, are over programmed, and special.
- Plugged in with cell phones, music downloads and instant messaging.
- 13- to 24-year-olds spend an average of 16.7 hours per week online not including e-mail while they spend 13.6 hours per week on average watching television.

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Racial Diversity

- The census reveals that minorities account for more than one-third of our national population, and that whites make up less than half the populations in four states: California, Texas, New Mexico and Hawaii and other states head in that direction.

American Demographics 2004

The population is also becoming more racially and culturally diverse. Traditionally termed minorities now account for more than a third of our nation's population. Whites make up less than half of the population in four states: California, Texas, New Mexico and Hawaii, with other states following suit.

...and boosting their buying power...

Data: University of Georgia

The Educational Attainment of People in the United States in 2003

| | |
|-----------------------------------|-----|
| Graduate or professional degree | 13% |
| Bachelor's degree | 27% |
| Associate degree | 7% |
| Some college, no degree | 25% |
| High school diploma or equivalent | 30% |
| Less than high school diploma | 30% |

Source: American Community Survey, 2003

...but they lag in school...

Data: National Center for Education Statistics

- 50 % of Asians have a bachelor's degree vs. 30 percent of non-Hispanic whites and 24 percent of blacks.
- 42% of women, 36% men (25-34) have a college degree. This gender gap in higher education did not exist 10 years ago.
- Census Bureau 2003 Current Population

As the population of Hispanics explodes...

Source: U.S. Census Bureau

Current U.S. Population

- White 76.16%
- African Americans 12.13%
- Asian Americans 4.15%
- Native Americans 0.77%
- Latinos (39 M) 13.85%

...they're replacing baby boomers in the workforce...

Source: U.S. Census Bureau

- The country's Latino population grew 13% between April 2000 and July 2003
- Latinos surpassed African Americans as the nation's largest minority group in 2002
- P&G spent \$90 M in ad dollars for 12 products - a 28% increase in one year; Krogers increased Buena Comida Line to 105 items.

More recently, other ways of segmenting or characterizing consumers have emerged. Thanks to the work of researchers like Paul Ray and the Hartman Group we know that consumers can be grouped according to the values they hold and by their social and environmental concerns. The emergence of this segment of the population comprising about 25% of U.S. adults is good news for producers of pasture-raised animal products. The Hartman Group, which did a lot of consumer research, has called this group the "New Green Mainstream". "Cultural Creatives" is the name given to this group by anthropologist Paul Ray. A survey conducted by the Food Alliance found an overwhelming interest in supporting sustainable farming. Hartman also reported this. Nearly 52% in this survey indicated a desire to support sustainable farmers. This is a high number. One of the things that is always problematic in consumer research is that if you tend to ask a question that is kind of one of those no brainers (who would say that they are for violence to children?), you have to allow for the possibility of a positive response bias. But nonetheless, these results do indicate a willingness on the part of consumers to express certain values in the way they spend some of their money.

"Green" Consumerism

- 25% U.S. adults guided by social, environmental considerations - *Harwood, 1995*
- 52% U.S. shoppers want to support sustainable farmers - *Hartman, 1996*
- Consumer categories - *Hartman, 1996*:
 - 7% True Naturals
 - 23% New Green Mainstream
 - 12% Affluent Healers
 - 10% Young Recyclers
 - 30% Overwhelmed
 - 18% Unconcerned

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The categories of consumers that came out of the Hartman Research were the “True Naturals” (7%), “New Green Mainstream”, the “Affluent Healers” the “Young Recyclers”, the “Overwhelmed”, and the “Unconcerned” The “True Naturals” you don’t really need to worry about. This consumer group is already committed, they are buying organic, they are willing to pay a premium for food that have these attributes of being environmentally sustainable, having the health benefits, hormone free, etc. This group just needs to have confirmation that they are making good choices so they continue. “You are doing a great job, this is the way you should be consuming, for these reasons, and here is more of it.”

The “New Green Mainstream” is the group I mentioned before, and is considered a real marketing opportunity. These are people who have a great interest in, and curiosity about sustainability. They want to learn more, and they want to know how they can express their values, concerns and interests in the marketplace. Importantly, they are resistant to paying premiums, but not seriously opposed to it if they can be convinced that if it is worth it they would do it. The key issue for these people is the availability of the kinds of products that they are looking for, that would express some or have those attributes.

The “Affluent Healers”, can be considered another, secondary target audience for pasture raised animal products, or environmental products of all kinds. These people have high income, high level of education, and they have a high disposal income so in that sense they are worth trying to go after. They want to help the environment, but it is not necessarily their top priority. One of ways to sway this group of consumers is to provide more information as to why helping the environment, or why purchasing decisions that help preserve the environment or sustainable choices, is a good idea for them, for their families, for their communities.

And then we have about 58% of the population made of groups that probably are not worth a lot of time trying to reach and persuade. The “Young Recyclers” account for about 10% population and tend to be younger. They have an interest in recycling and participating in some public programs that support environmentalism to a certain level, but they are really not that interested in the food supply and don’t see a connection between environmentalism and food choices. The “Overwhelmed” – are any of us in that group? – make up about 30% of the population. We talked about how everybody is working more, but not everyone is apathetic. This group tends to have a lot of apathy about everything. Then finally, 18% of the population is considered the “Unconcerned”. These people are really not into food; when they do think about food, they go the easy route for meal planning and preparation. This is probably not a group to focus limited marketing energy on, since you would spend a lot of time trying to convince this group to make choices for reasons beyond satisfying their immediate needs.

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While the Hartman Group segmented the population based on demographics, others suggest that using values, rather than demographics, is perhaps a more useful and meaningful approach. In his studies, anthropologist and sociologist Paul Ray has concluded that America is in the midst of a major paradigm shift that reflects maintaining lifestyles that are more environmentally and spiritually sustainable. Along with this shift comes new types of consumers who want to integrate their purchasing decisions with concerns that they have about a number of things, including human rights, fair trade, environment, sustainable practices, spiritual endeavors, and personal development.

These consumers— Ray termed them “Cultural Creatives” and they were identified as the LOHAS (lifestyle of health and sustainability) segment by Natural Business

Cultural Creatives

- New segment based on Values
- Major paradigm shift
- LOHAS (lifestyles of health and sustainability)
- 50 million people, 26% of U.S. adults
- Fastest growing group
- Women outnumber men
- Focus on relationships and authenticity
- Tell the Story

- Nachman-Hunt, 2000
- Ray, 2000

Communications – is considered the fastest growing group of consumers. It constituted about 4% of the population in the 60’s and it grew to about 24% by 1995. Demographics do not define this group, with the one exception that this group has a higher percent of women in it, at about 60%. No other demographic characteristics – education, income, age – can be used to define the Cultural Creatives. They include all age groups living anywhere in the U.S., it is not concentrated in the urban or rural areas, and they are just as likely to be Republican

as Democrat as Independent.

This segment is really based on values. These consumers focus on relationships, so the best marketing approach for them would be to tell stories, they are very interested in the authenticity and the meaning of a product. These consumers would want to know the story of the farmer and how the animals are raised. This is the group that would probably want to visit a farm and see how these products are made. This group might be considered real “foodies”; they are really into food and into the quality. They are ready and willing to pay for taste, for flavor. .

When we go to the marketplace to look at food labels, this is what people might see. I even included a little slogan up there that we see in Wegman’s, one of Ithaca New York’s large supermarkets. They have this line of animal products – chicken and meat, beef products – that has “Food you can feel good about” on the label. I think that influenced the title of my talk because I think people want to be able to eat a variety of foods including meat, and they don’t want to feel guilty about it, they want to feel good about it. Wegman’s has a knack for picking up on those kinds of consumer interests and they are using it to market some of these products.

Pasture-raised products in the Market

- “free-range”
- “grass-based”
- “natural”
- “food you can feel good about” - Wegmans, Ithaca, NY

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Health and Food Safety

- Lower in fat and calories
- Increased CLA (conjugated linoleid acid), omega-3 fatty acids, vitamins and minerals
- Lack of hormones, antibiotics

Why would consumers choose to buy pasture-raised animal products? Nutritional benefits would be one of the reasons people would want to seek out pasture raised animal products. Regardless of the truth and the extent of truth behind the claims, this is what they might be seeing, what they might remember and this is what they might be seeking in these products.

There are other reasons. Certain segments of the population might be interested in issues related to animal health and animal welfare. Humane treatment, whether the animals are given a natural diet, stress levels, less sickness -- these things may have more or less importance to consumers, depending on how much they know about animal production.

Animal Health and Welfare

- Humane treatment
- Natural diet
- Natural activity
- Lower stress levels
- Less sickness
- Seasonal breeding and birthing

Environmental Protection

- Natural manure management
- Reduced topsoil erosion
- Supports native plants
- Natural insect control
- Reduction of greenhouse gasses
- Less reliance on fossil fuels

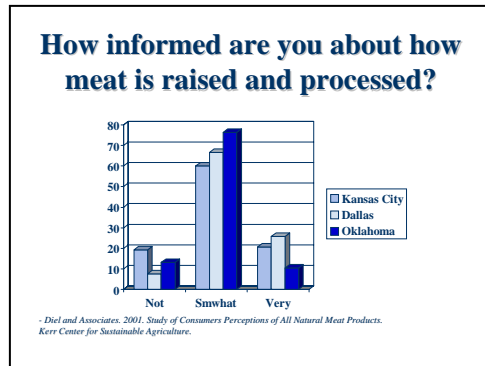
Environmental protection is another area that consumers will be interested in and that will help them seek out pasture raised animal products.

For those with a family history including agriculture or farming background, of course the livelihood and the lifestyle of farms and farm communities, and helping farm communities will be important.

Quality of Life for Farmers

- Reduction of input costs
- Better work environment air quality
- Requires excellent management style
- “Grass farmers” who use animals for harvesting their grass crop

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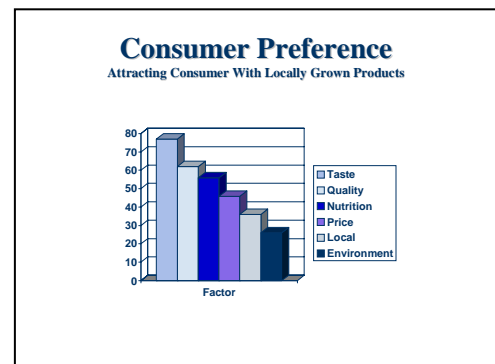


I reviewed several studies of consumer preference for natural or pasture-raised animal products. Surveying food store customers in Kansas City, Dallas, and Oklahoma, the Kerr Center for Sustainable Agriculture at Oklahoma State University set out to learn more about consumer preference for and knowledge about meat in general and natural meat in particular. They found that most consumers felt they were “somewhat” informed about how meat is raised and processed. In Dallas, a higher percent of people felt they had at least a very good understanding of how meat is raised and processed.

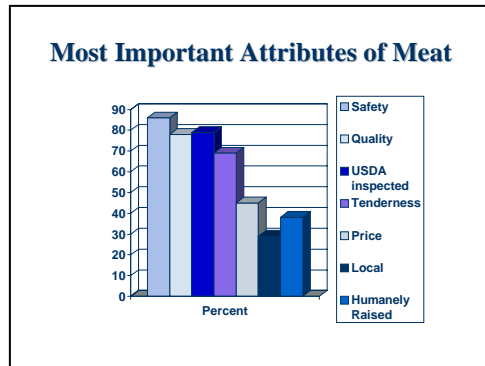
One attribute that pasture-raised animal products provide to consumers is the ability to trace back to the farm, the animal and to know about how the animal was raised. In the same study, researchers asked how important it was for consumers to know the meat they purchased could be traced back to the farm and animal of origin. Results suggest that it is quite important to the consumers who participated in this survey to be able to trace the product back to the farm and animal origin.

In the fall of 2003, Leopold Center and the Iowa State University Business Analysis Laboratory conducted an Internet-based study focusing on pasture-raised beef and dairy products to learn about the perceptions that Iowa consumers have regarding pasture-raised beef and dairy products, gauge the level of awareness Iowa consumers have regarding a set of perceived benefits of pasture-raised beef and dairy products, and to determine their level of interest in receiving information about how and where their food products are raised. This online survey was sent to fifteen hundred e-mail addresses of which most were in Iowa and 20 percent each to Nebraska and Illinois residents.

Considering consumers’ level of satisfaction with fresh and frozen meat, this internet survey found that nearly 18 percent of respondents were somewhat to very unsatisfied with the fresh and frozen beef products available for purchase. Approximately 76 percent of respondents were somewhat to very satisfied with their beef purchases, while less than 22 percent indicated they were very satisfied. Fewer than 6 percent of the respondents did not purchase any beef products. This can be viewed as an opportunity, when nearly 20 percent of those responding were either very or somewhat unsatisfied and less than a quarter reported being very satisfied.



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In the same survey, consumers were asked to rate several attributes (from not important to most important) when purchasing fresh or frozen beef products. Not surprisingly, freshness and taste were most frequently rated as most important. Tenderness, price, and appearance followed freshness and taste, being rated as “most important” by 52, 47 and 42 percent of the respondents respectively. Only 10 percent of consumers rated how it was raised as most important, and 6 percent rated where it was raised as most important. This makes sense considering that only 10 percent of the entire sample claimed to have purchased organic beef or natural beef raised without antibiotics or hormones.

When asked about the term “pasture-raised beef” more than 15 percent of those surveyed by the Leopold Center indicated that the term had no meaning to them. However, 57 percent interpreted the term to mean either “raised and grazed on open pasture” or “grass-fed”.



One area of great interest to both producers and consumers of pasture-raised animal products is the multiple benefits that these products may yield. The Leopold survey included a question to assess the level of awareness of the perceived benefits related to pasture-raised beef shown on this slide. Respondents were most aware of the perceived benefit of more humane treatment of cows but more than 45 percent of those responding were aware of the perceived benefits of protecting water quality and a reduced need for antibiotics.

- Factors Associated with Sustainable Products**
- After taste, freshness, safety, health:
 - “practices that protect water quality” (89%)
 - “protecting soil quality” (87%)
 - “maintain/improve natural resources (85%)”
- U Minn, 2000

But when asked what attributes consumers connect to “sustainably produced products” they tend to have a higher recognition. A study conducted by Ramona Robinson and Cheryl Smith at the University of Minnesota examined factors associated with consumer purchases of sustainably produced foods. For this study, 550 consumers were surveyed in urban and suburban grocery stores in the St. Paul metropolitan area. After freshness, safety, and health, the attributes listed

here were ranked as important or very important by a high proportion of survey respondents.

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Similarly, a telephone survey was conducted by the Food Processing Center at the University of Nebraska – Lincoln, of 500 heads of household in Nebraska to assess consumer interest in locally grown products. Researchers found that taste, quality, health and price topped the list of interests. But there is substantial importance placed on other attributes such as support for local farmers, locally grown or produced, environmentally friendly, etc.

This study revealed much potential for growing a local market for a number of different kinds of products. I think this is important because there is an association between support for local and support for the other attributes found in pasture-raised animal products. Respondents were asked, “Which of the following locally grown or produced foods has someone in your household purchased? If an item was not purchased: if, available, would you purchase this item?” For those products that are purchased less frequently from local sources there is a significant interest in doing so.

The Marketing Challenge

- Educating and Communicating benefits of “pasture-raised” or “grass-fed”
- Low awareness of terms
- Need to connect with health, food safety, environmental protection, local/family farms and animal welfare issues

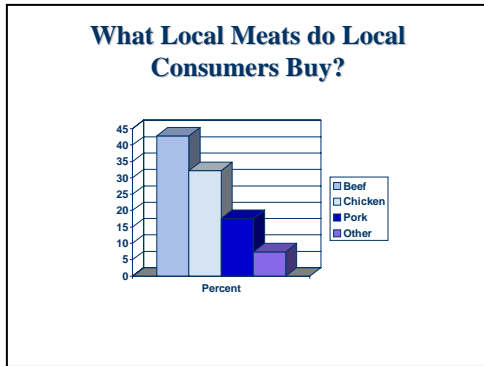
In terms of the marketing challenge, clearly there needs to be a greater understanding, more educating and better communicating about benefits of pasture raised and grass fed, and what those terms really mean. Clarification about the terms being used would also be useful, and would help with marketing and communicating with consumers.

Producers of pasture-raised animal products would do well to emphasize those attributes that we know are important to consumers – health, food safety and environmental protection. Remember those “Cultural Creatives” who represent 25% of households and are making purchasing decisions based on some very important values? These values – health, environment, family farms, animal welfare – need to be underscored for consumers as does how their food purchases can support these values. These are characteristics of pasture raised animal products.

Important Attributes of “River-friendly” Beef

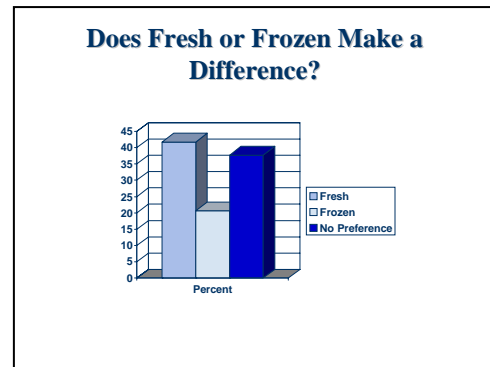
- No added hormones
- Grass-fed
- Promote sustainable practices
- Help support local, family farms
- River friendly
- Reserve open spaces

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In terms of looking at what local meat consumers do buy, this again is looking at local, not specifically pasture-raised but likely to be, 74% were interested in beef, followed by chicken at 32% and about 18% for pork and then other products.

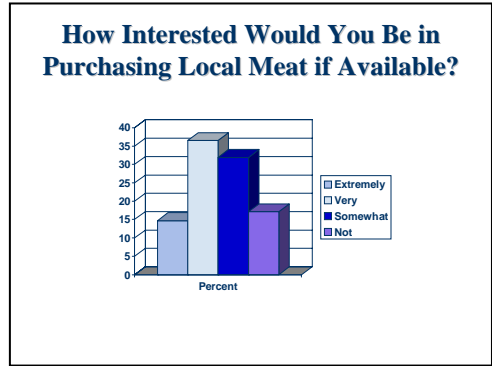
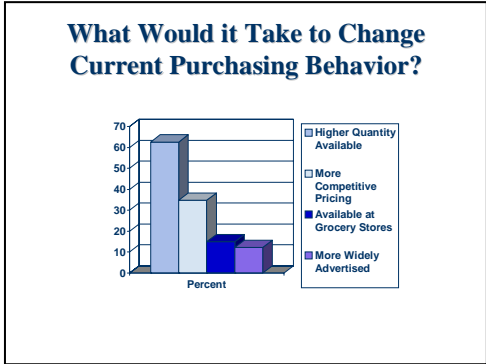
How do consumers want to find these foods? Does frozen versus fresh make a difference? 42% prefer fresh, 21% said that frozen would be fine, 38% had no preference. I think that is a pretty high percent, so in terms of form and getting products to market I think this is fairly useful information.



Because there is usually a price differential with pasture-raised, it is useful to get a sense of consumers' willingness to pay. In terms of pasture raised animal products, there is a fairly high percentage -- nearly 35% -- of consumers who are willing to pay at least 10% above the standard price for meat. The highest percent of correspondents want the same price but then a pretty small percent, 6%, are willing to pay at least 25% above regular market price for other meats. There is, at least within certain segments of the population, a willingness to pay more for them.

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What would it take to shift more purchases to pasture-raised? Consumers definitely want to be assured of high quality in alternative meat products. 63% wanted to have a higher quality product, 35% said that it was important that the prices be competitive, availability was a key issue for 15% of the population, and 12% wanted to have more marketing, better advertising so they would know about these products.



How interested would you be in purchasing local meat if it were available? 15% said they were extremely interested, very was about 37%, about a third of the study said that they would be somewhat and 17% not at all interested.

Trends

Teresa Heinz Kerry support of grass-fed.

- Teresa Heinz Kerry, wife of presidential candidate John Kerry, advocates healthy food for the nation and for her own family, according to an interview in the October 13th edition of The New York Times. Well educated and outspoken, she is a proponent of pasture-based ranching—so much so that she has switched her own small herd of cattle from grain to grass.
- In her comments to Times columnist Marian Burros, she said, "I used to have 80 head of cattle. I used to feed them a little grain, but now they are all grass fed with alfalfa because of studies that show that animals that feed on grass have high levels of CLAs," conjugated linoleic acids or nutrients that are believed by some New Zealand scientists to reduce heart attacks and cholesterol levels."

GRASS FED AND BSE

Grass-fed beef goes mainstream.

- Within the span of two days, *The New York Times* and *The Wall Street Journal* recommended that consumers who are looking for safe meat choose either organic or grass-fed beef. This is a testimony to the nation's growing awareness of pasture-based farming. Most of the recent publicity has focused on the safety of grass-fed beef, one of its many virtues. Visitors to www.eatwild.com can get the whole story.
- (*The New York Times*, "Warily Searching for Safer Beef," by Marian Burros, December 31, 2003. *The Wall Street Journal*, "Why Blaming Canada Isn't Enough: U.S. Mad-Cow Inspections Lack Teeth," by Tara Parker-Pope, December 30, 2003.)

In conclusion, there are some open questions that go beyond this discussion. One I find myself asking relates to ideas about local, and whether this kind of meat production should engage in a national or international marketing campaign. Regardless of meat production methods, what level of consumption would be sustainable if all meat production were pasture raised, if it was integrated into agricultural systems and communities, where are the boundaries? We haven't started that discussion yet.

Open Questions

- Regardless of production methods, what level of meat consumption is sustainable?
- Regardless of production method, what level of meat consumption is the most healthful?
- How will pasture raised animal products become available and affordable?

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Regardless of production method, what level of meat consumption is the most healthful? We haven't really answered that question either.

Finally how will pasture raised animal products become more available and more affordable? We have started talking about those, but I think these are some of the issues that we need to keep engaged in.