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MORNING CONSULT



American Farm Bureau Federation

THANKSGIVING POLLING PRESENTATION

November 2019



AMERICAN FARM BUREAU FEDERATION®

Key Points

1 A strong majority of adults celebrate Thanksgiving with a special meal.

- And a majority of adults celebrate Thanksgiving at their home or a family member's home.

2 A majority of adults cook their entire Thanksgiving meal at home, while 14% purchase part of their meal fully cooked.

- Younger adults are more likely than older adults to purchase part of their Thanksgiving meal fully cooked.

3 95% of adults serve turkey at their Thanksgiving meal, and half serve both turkey and ham.

- In addition to the tested items, adults also typically serve macaroni and cheese, gravy, corn, and different types of desserts at their Thanksgiving meal.

4 A strong majority of adults (88%) were not aware farmers receive 8 cents of each dollar consumers spend on food.

5 Three in four adults are interested in learning more about how their food is produced.

- More than one in three Millennial and Gen X adults are *very interested* in learning more about how their food is produced.

6 A strong majority of adults (88%) trust farmers.

Methodology:

This poll was conducted by Morning Consult from October 31 - November 3, 2019, among a national sample of 2,200 Adults. The interviews were conducted online and the data were weighted to approximate a target sample of adults based on age, race/ethnicity, gender, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.



Contents



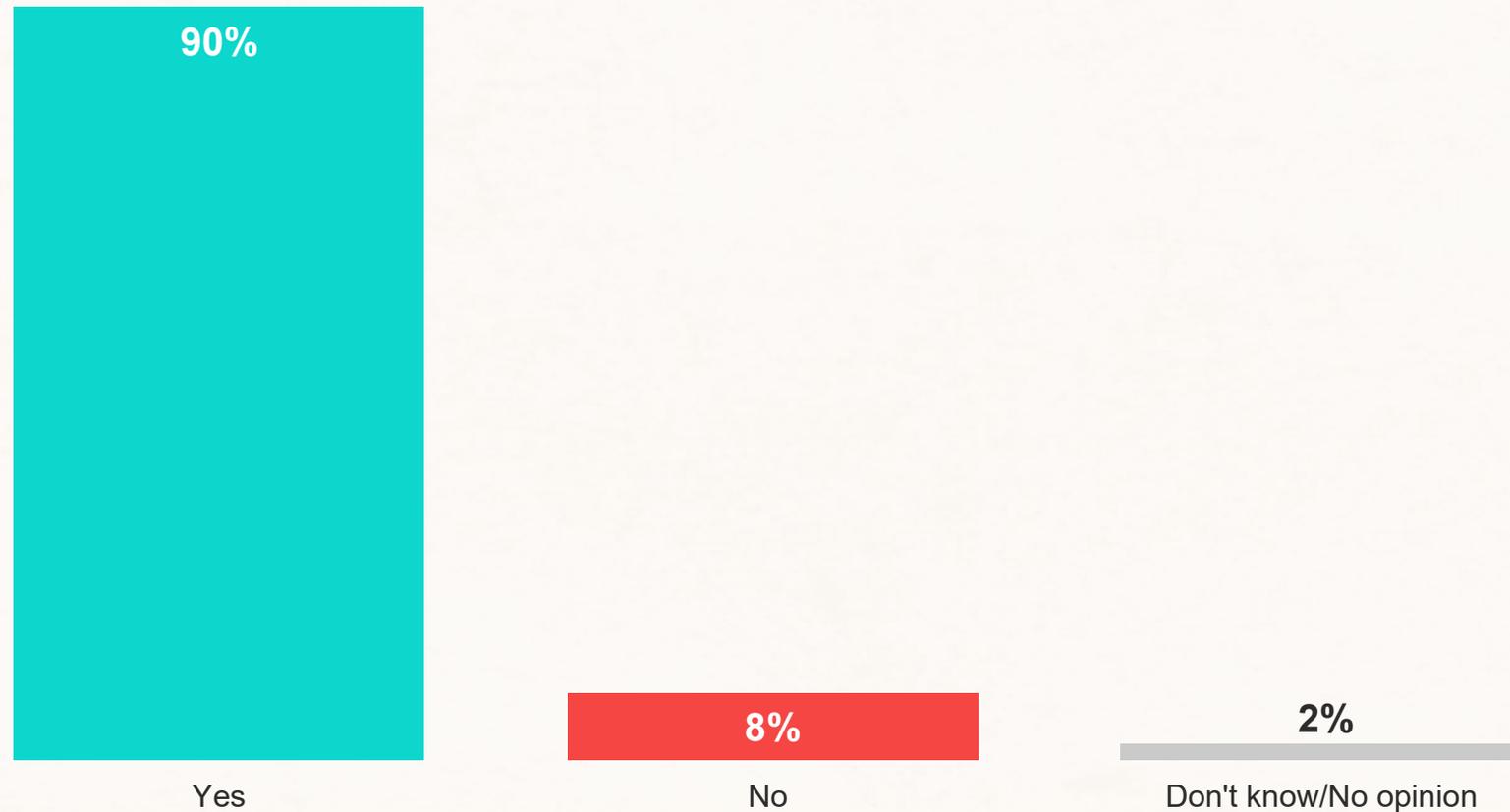
Thanksgiving Traditions and Interests



Sentiment Toward Farmers & Farming

A strong majority of adults (90%) celebrate Thanksgiving by eating a special meal.

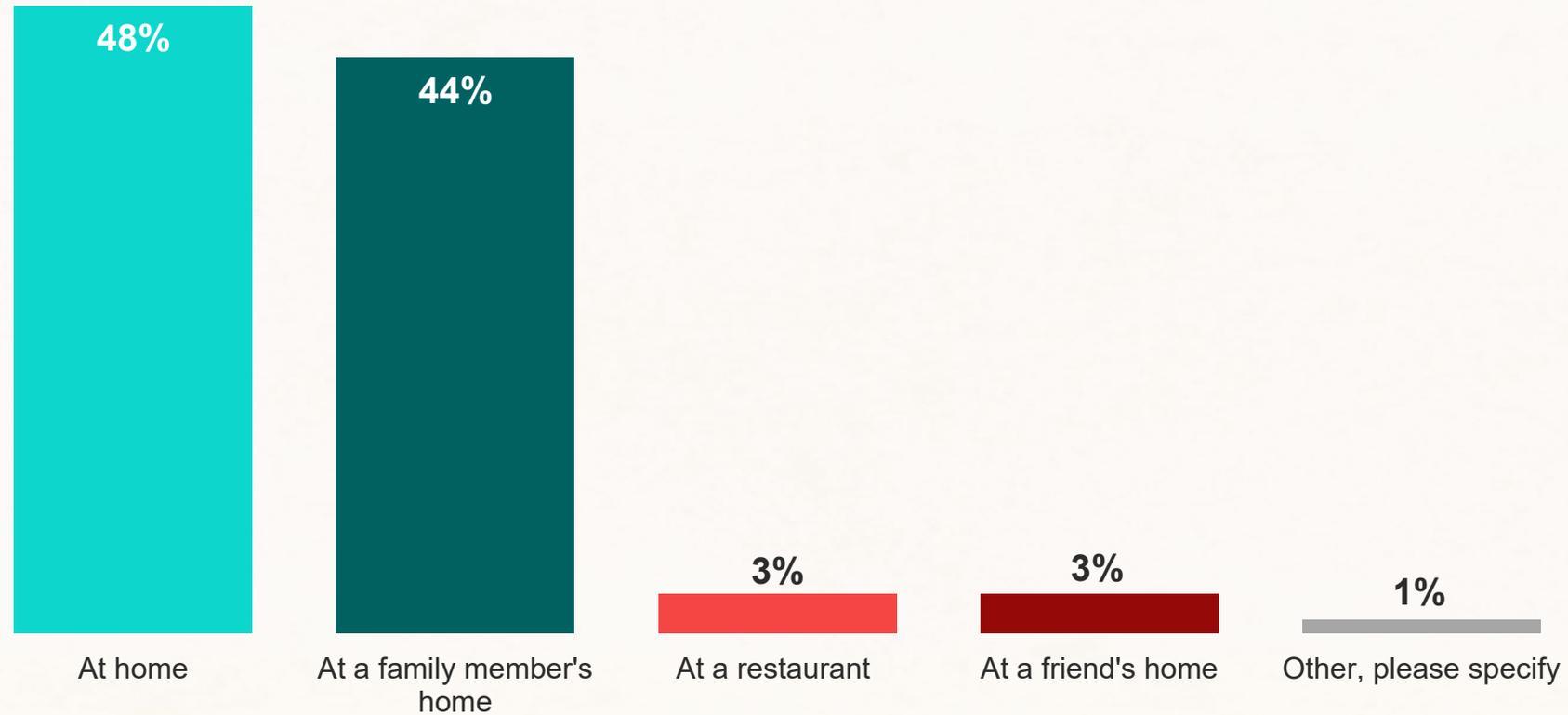
Do you typically celebrate Thanksgiving by eating a special meal?



A majority of adults celebrate Thanksgiving at home (48%) or at a family member's home (44%).

Where do you typically eat your Thanksgiving meal?

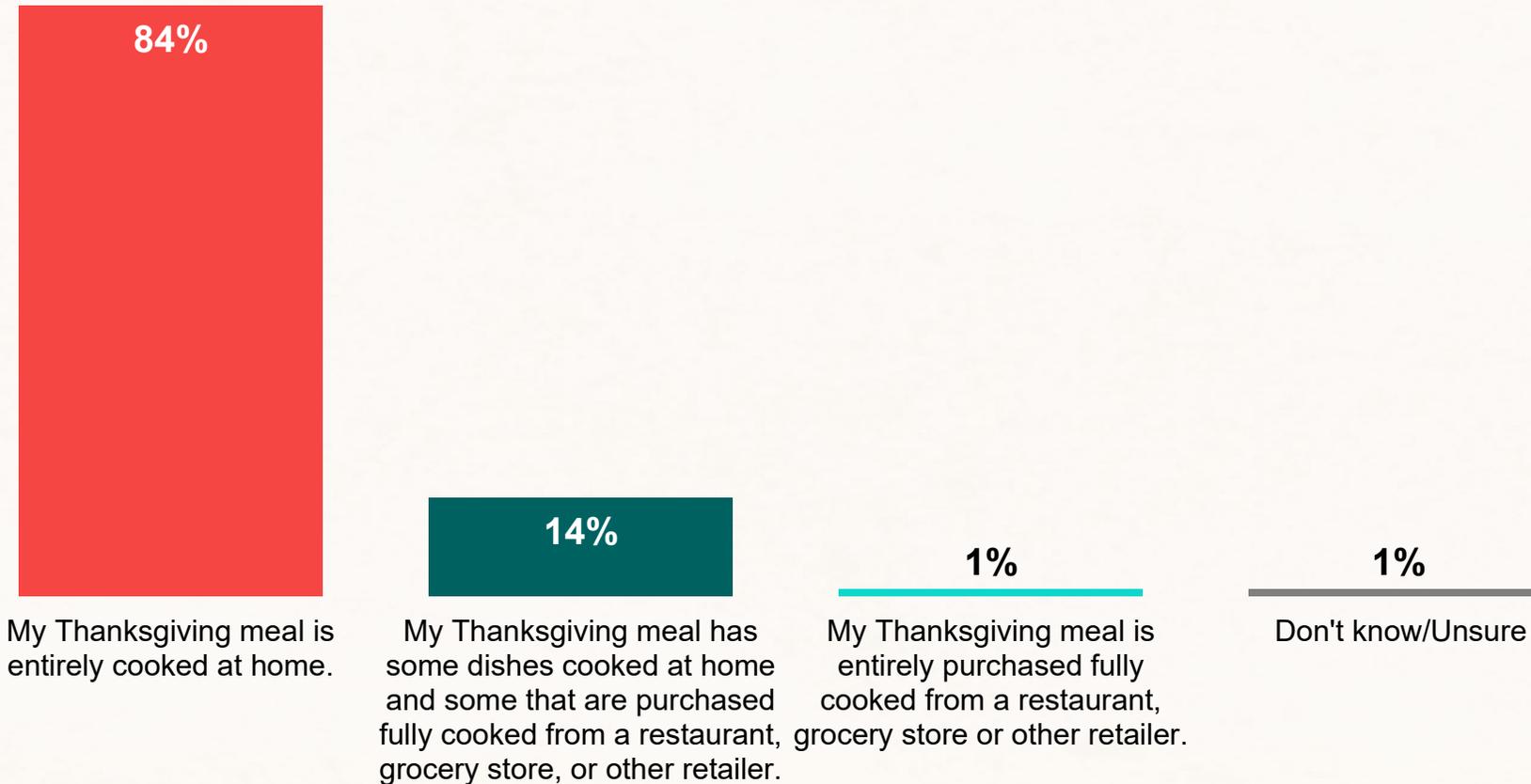
ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL



And a majority of adults cook their entire Thanksgiving meal at home, while 14% purchase part of their meal fully cooked.

Which of the following best describes how your Thanksgiving meal is cooked?

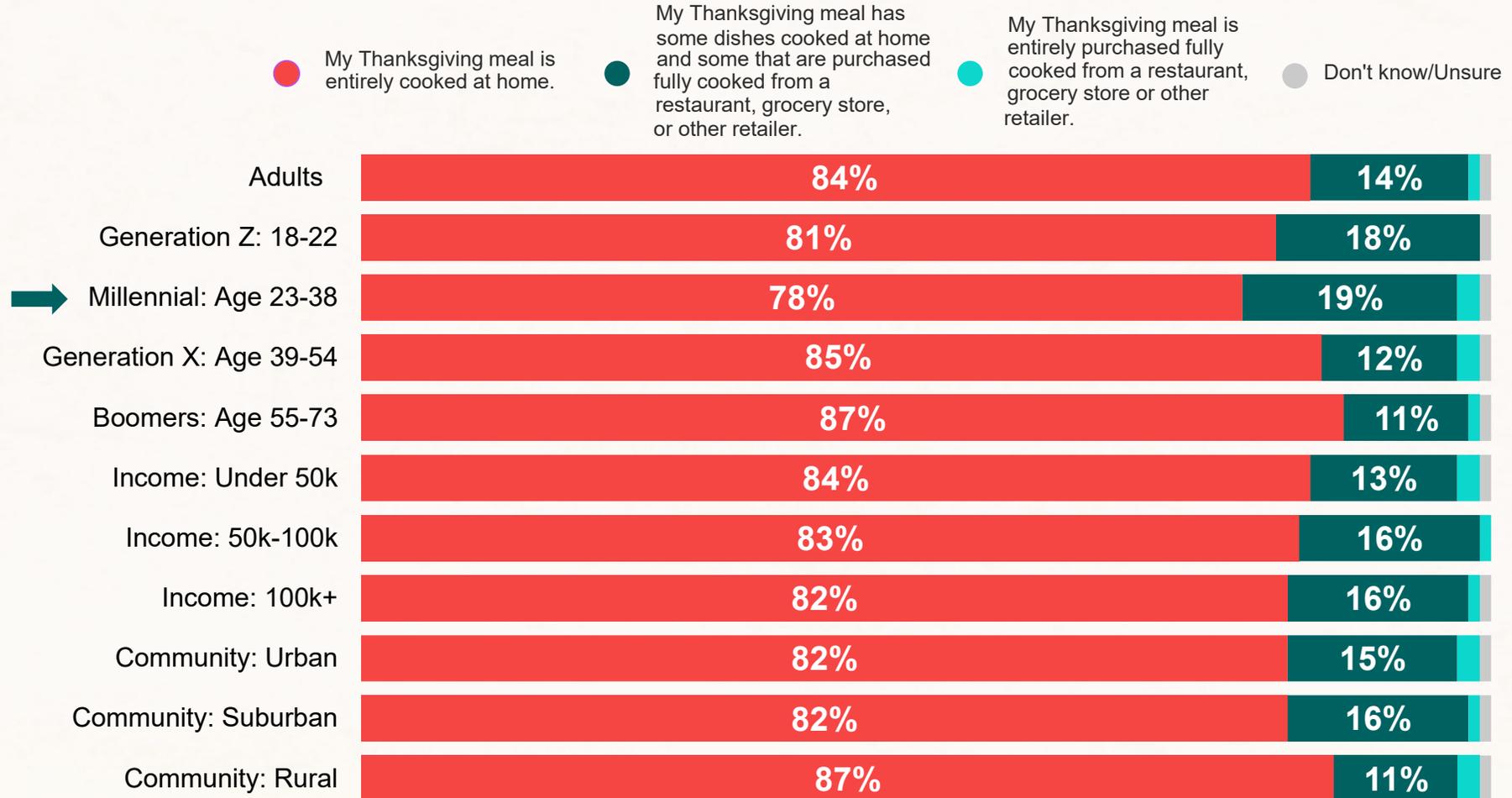
ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL AT HOME



Millennials are more likely than older generations to purchase part of their Thanksgiving meal fully cooked.

Which of the following best describes how your Thanksgiving meal is cooked?

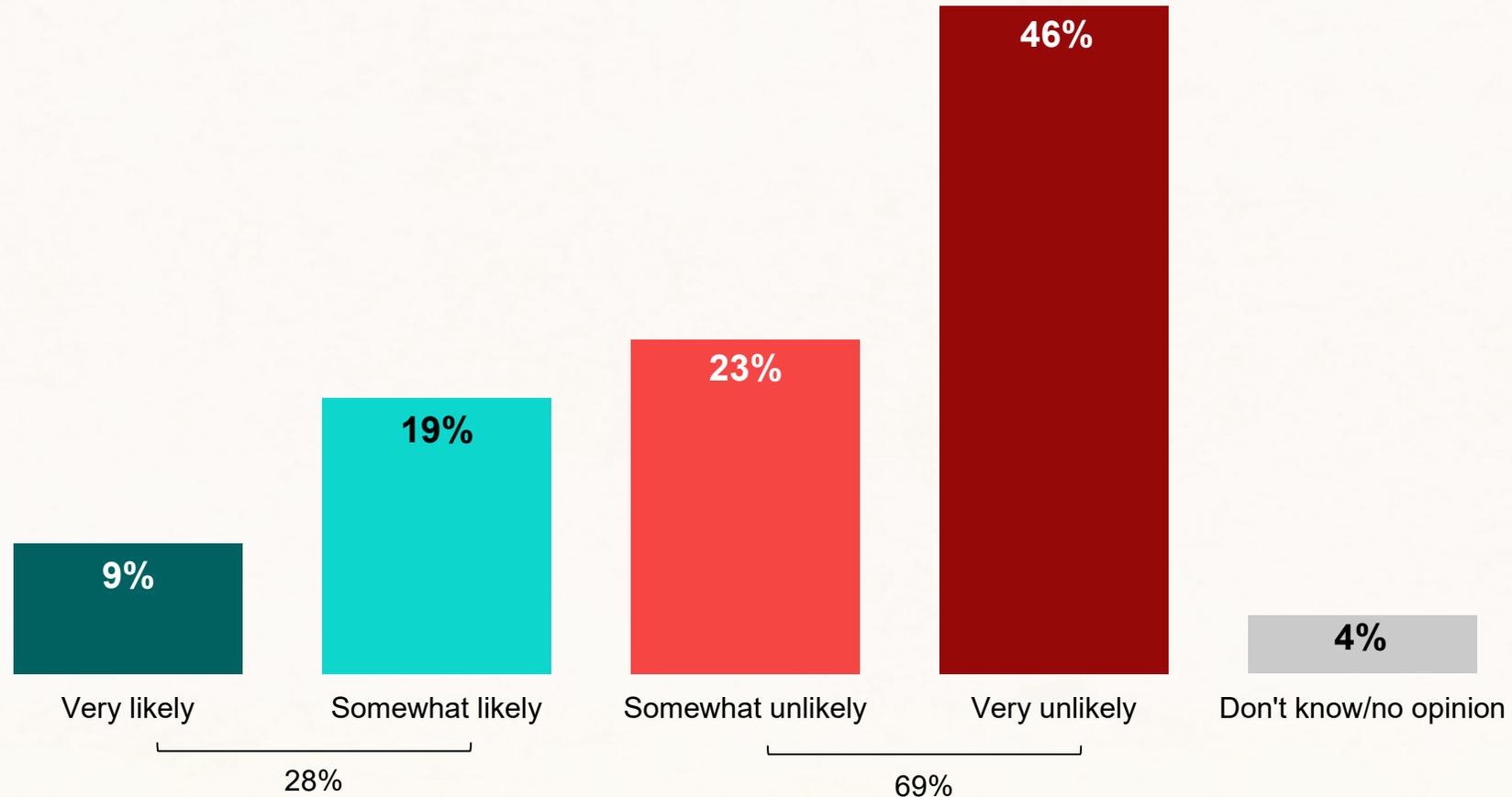
ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL AT HOME



Among adults who purchase part of their Thanksgiving meal fully cooked, a majority (69%) are unlikely to use a delivery service to have these dishes delivered to their home.

Thinking about the dishes you purchase fully cooked from a restaurant, grocery store, or other retailer for your Thanksgiving meal, how likely are you to use a delivery service to have these dishes delivered directly to your home?

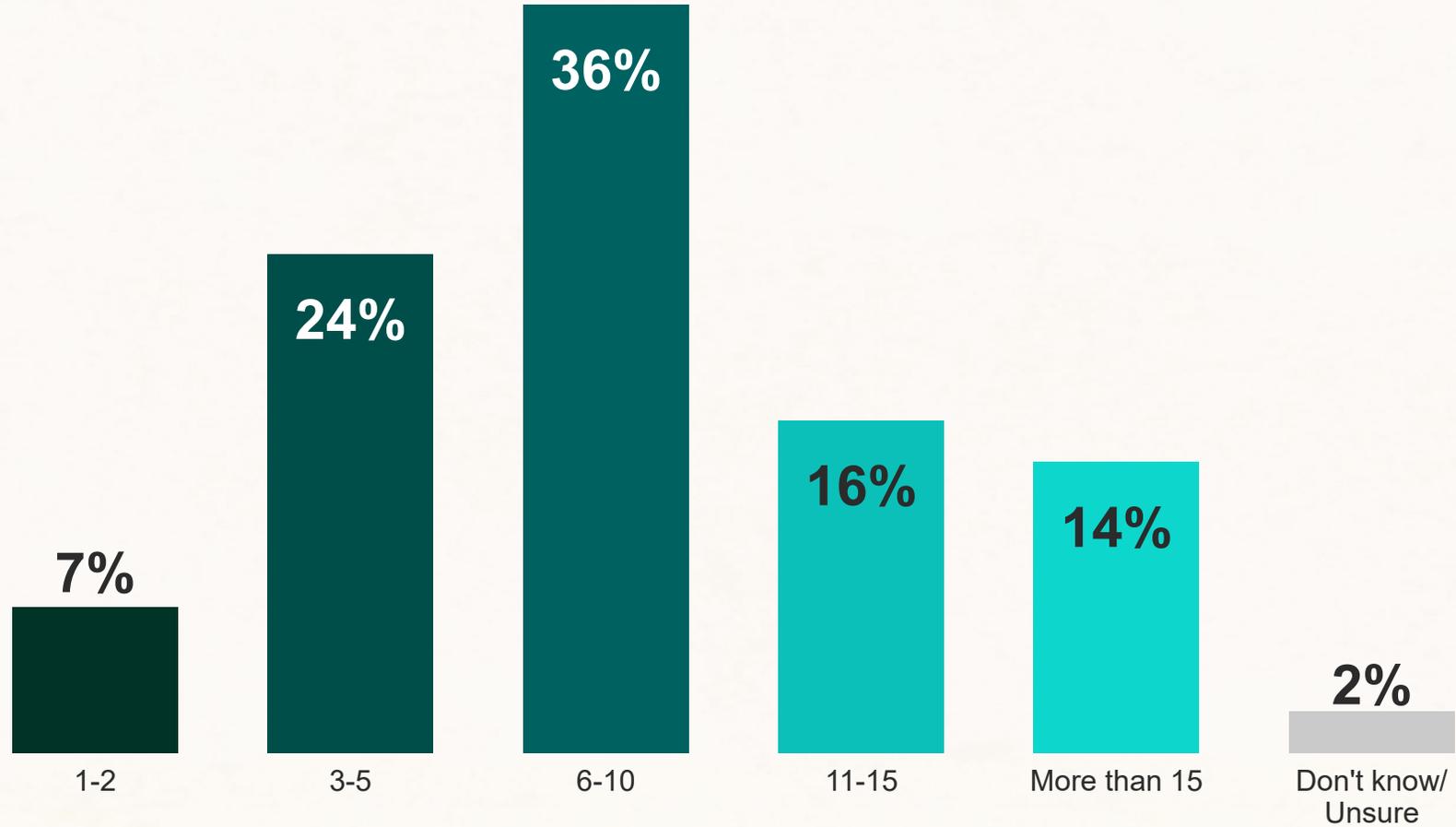
ADULTS WHO HAVE AT LEAST SOME PART OF THEIR THANKSGIVING MEAL PURCHASED



A plurality of adults have 6-10 people at their Thanksgiving meal.

How many people are typically at your Thanksgiving meal?

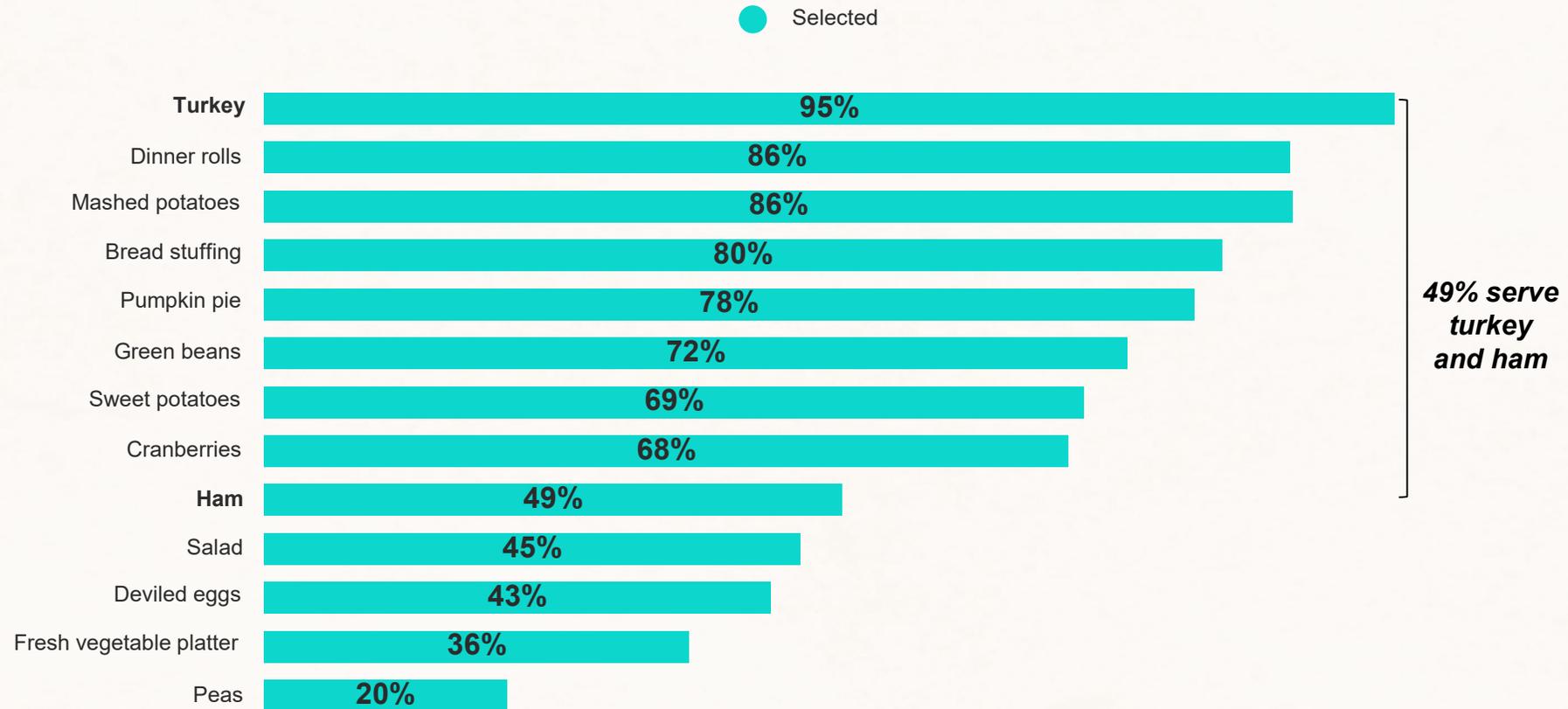
ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL



95% of adults serve turkey at their Thanksgiving meal, and half (49%) serve turkey *and* ham.

Thinking about your Thanksgiving meal, which of the following items or dishes are typically served? Please select all that apply.

ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL



In addition to the tested items, adults also typically serve macaroni and cheese, gravy, corn, and different types of desserts.

In addition to the dishes you selected above, are there any other dishes typically served at your Thanksgiving meal? Please list below any additional dishes that are served. If there typically are not any additional dishes served, please write 'n/a' or 'no'.

ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL



1. Macaroni & cheese



2. Gravy



3. Corn



4. Apple pie



5. Pecan pie



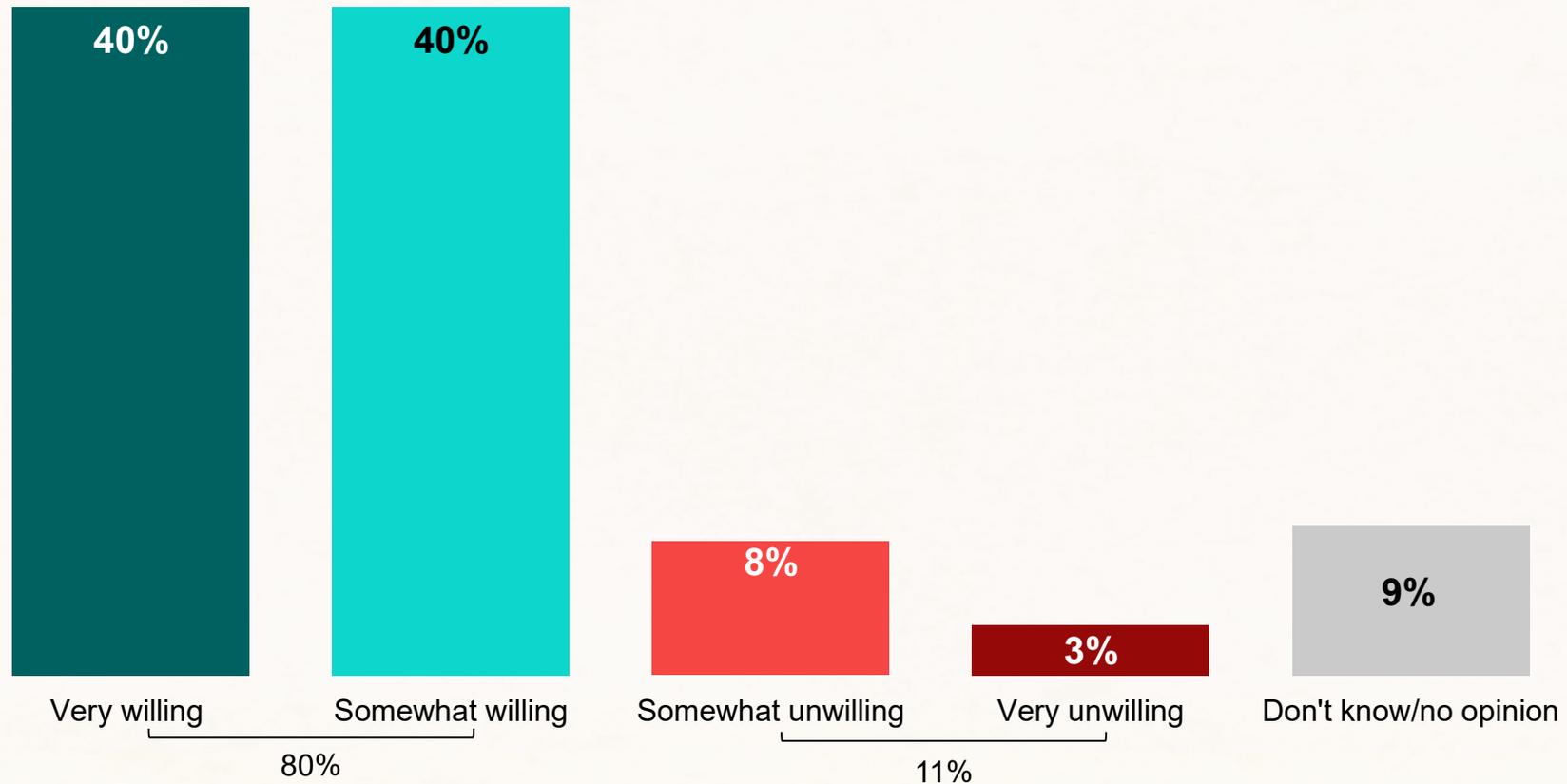
6. Chocolate desserts



Two in five adults are very willing to try new dishes at their Thanksgiving meal.

How willing or unwilling are you to try new dishes at your Thanksgiving meal?

ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL



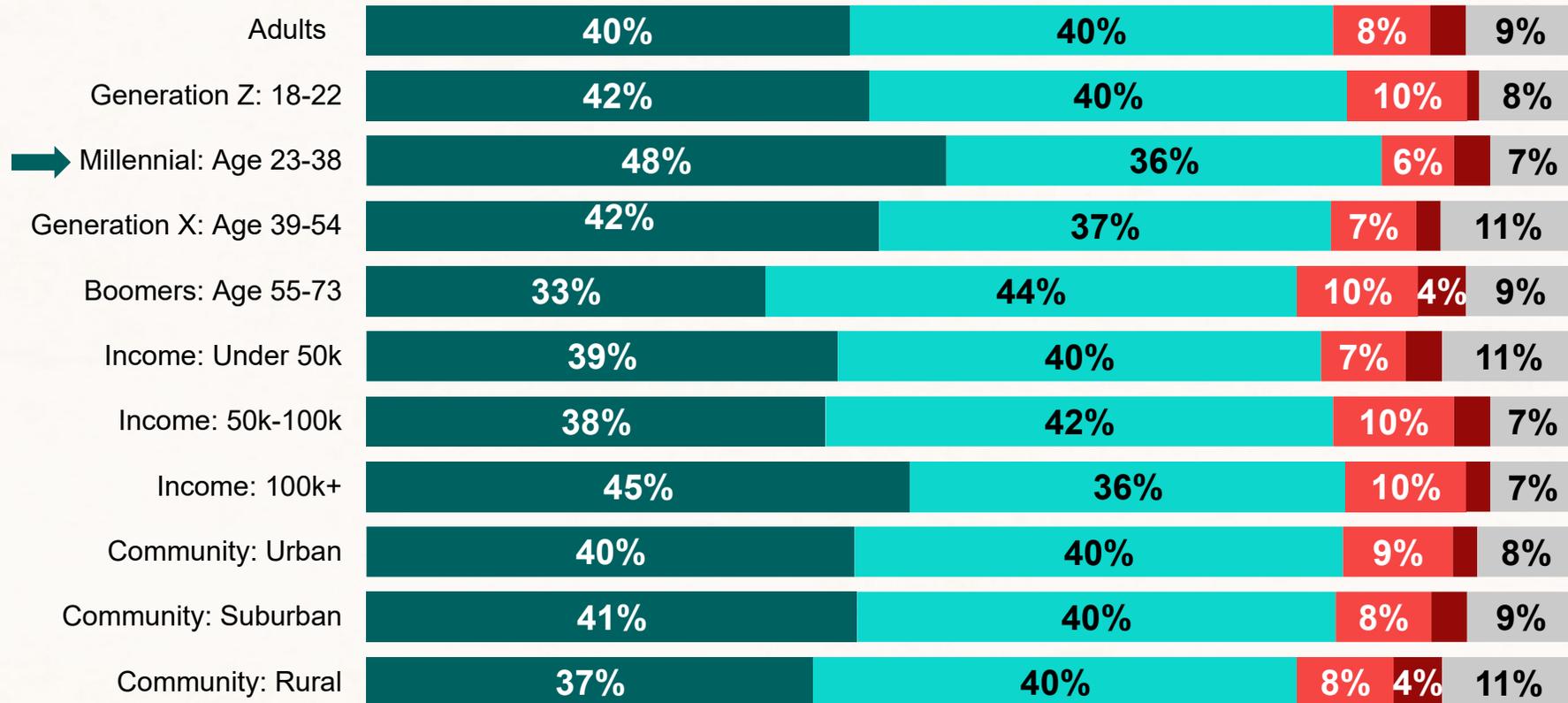
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*n=297

Nearly half of Millennials (48%) are very willing to try new dishes at their Thanksgiving meal.

Which of the following best describes how your Thanksgiving meal is cooked?

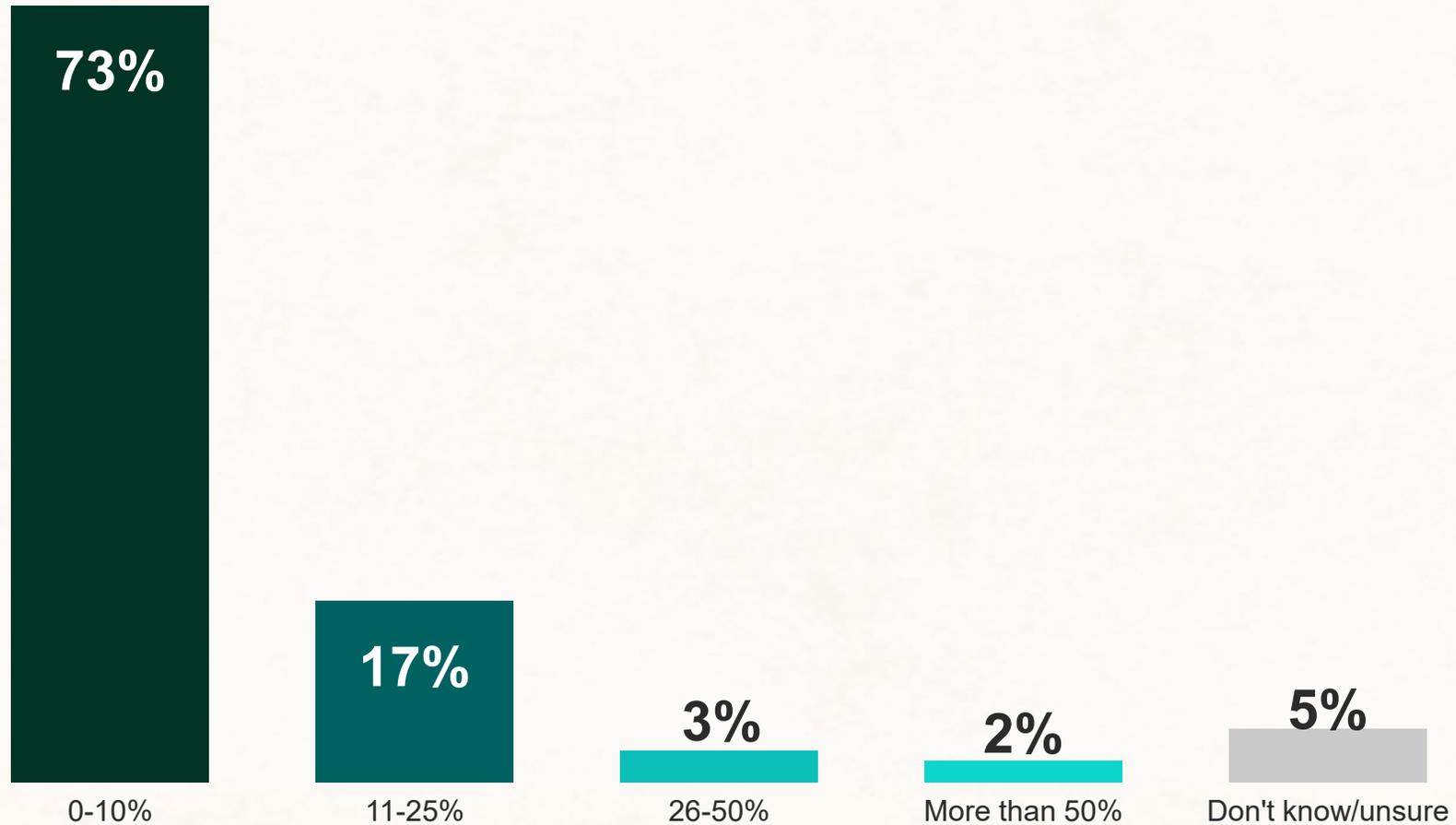
ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL



Three in four adults (73%) say a minimal amount (0-10%) of their Thanksgiving meal goes to waste.

Sometimes leftovers from a Thanksgiving meal are thrown away or go to waste. Based on what you know, what percentage of your Thanksgiving meal goes to waste?

ADULTS WHO CELEBRATE THANKSGIVING WITH A MEAL AT HOME



Contents

1

Thanksgiving Traditions and Interests

2

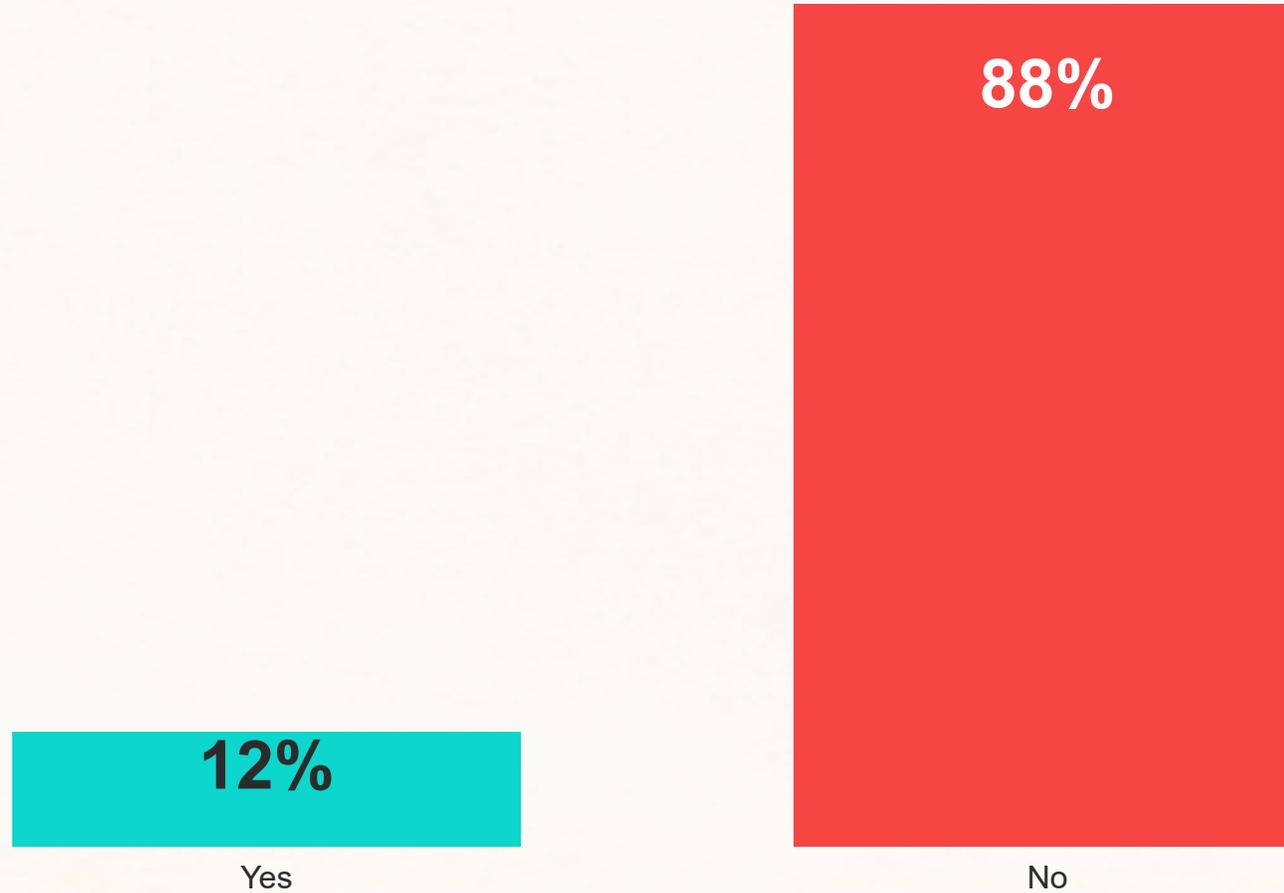
Sentiment Toward Farmers & Farming



A strong majority of adults (88%) were not aware that farmers receive 8 cents of each dollar consumers spend on food.

According to the U.S. Agriculture Department's Economic Research Service, farmers receive 8 cents of each dollar that consumers spend on food. Were you aware of this fact?

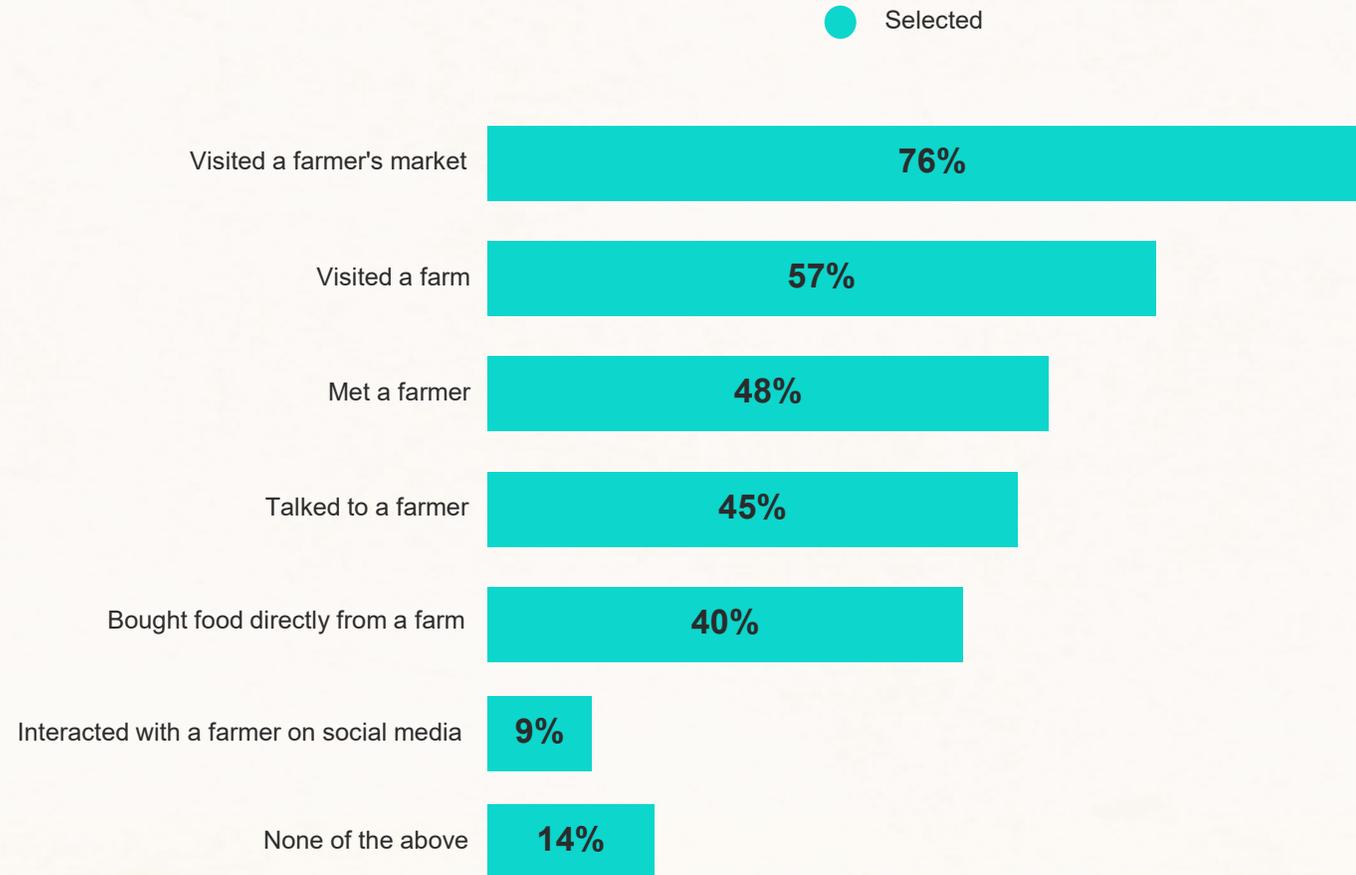
U.S. ADULTS



More than half of adults (57%) say they have visited a farm at some point, and half (48%) say they have met a farmer.

Have you *ever* done any of the following? Please select all that apply.

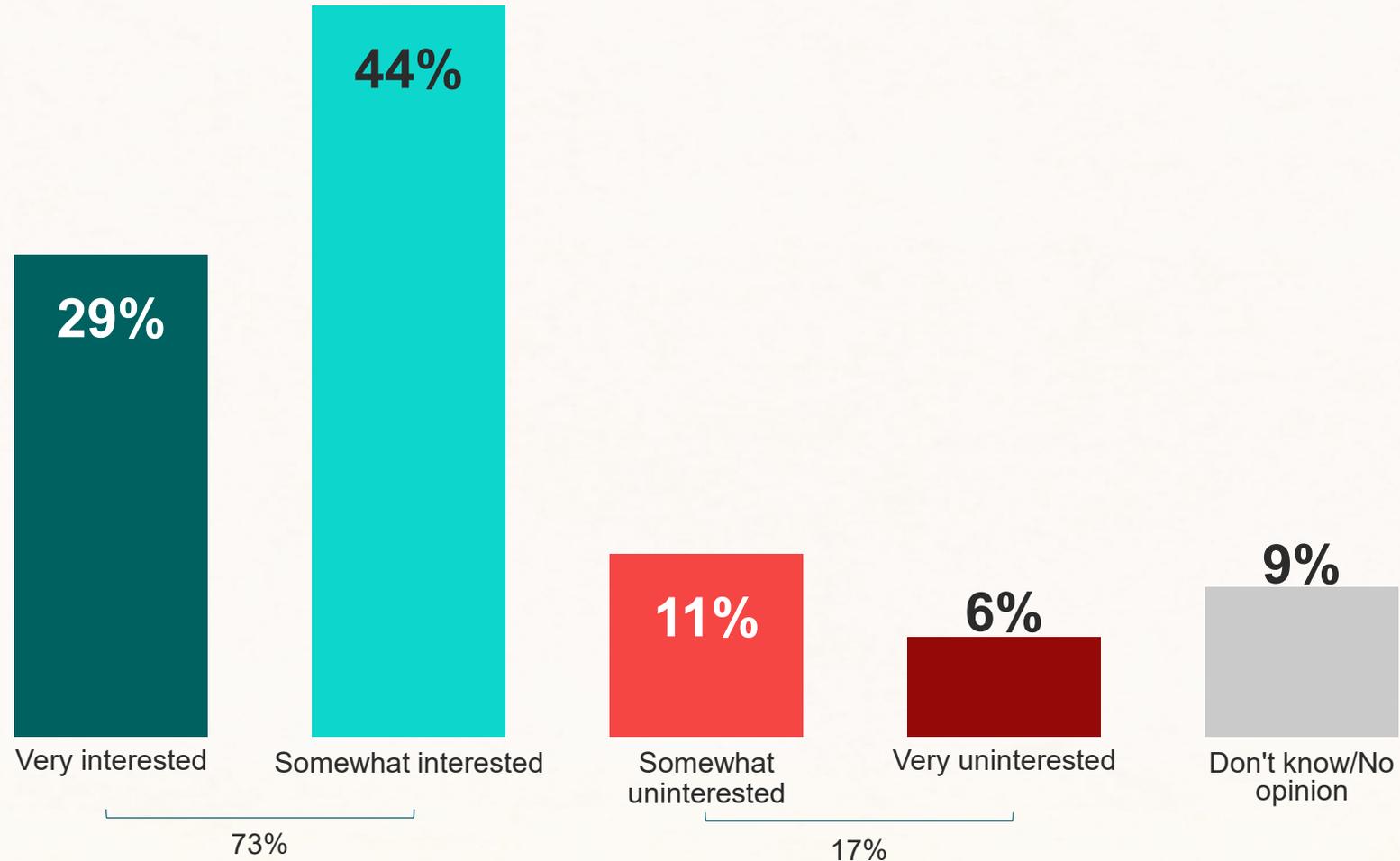
U.S. ADULTS



Three in four adults (73%) are interested in learning more about how their food is produced.

How interested are you in learning more about how your food is produced?

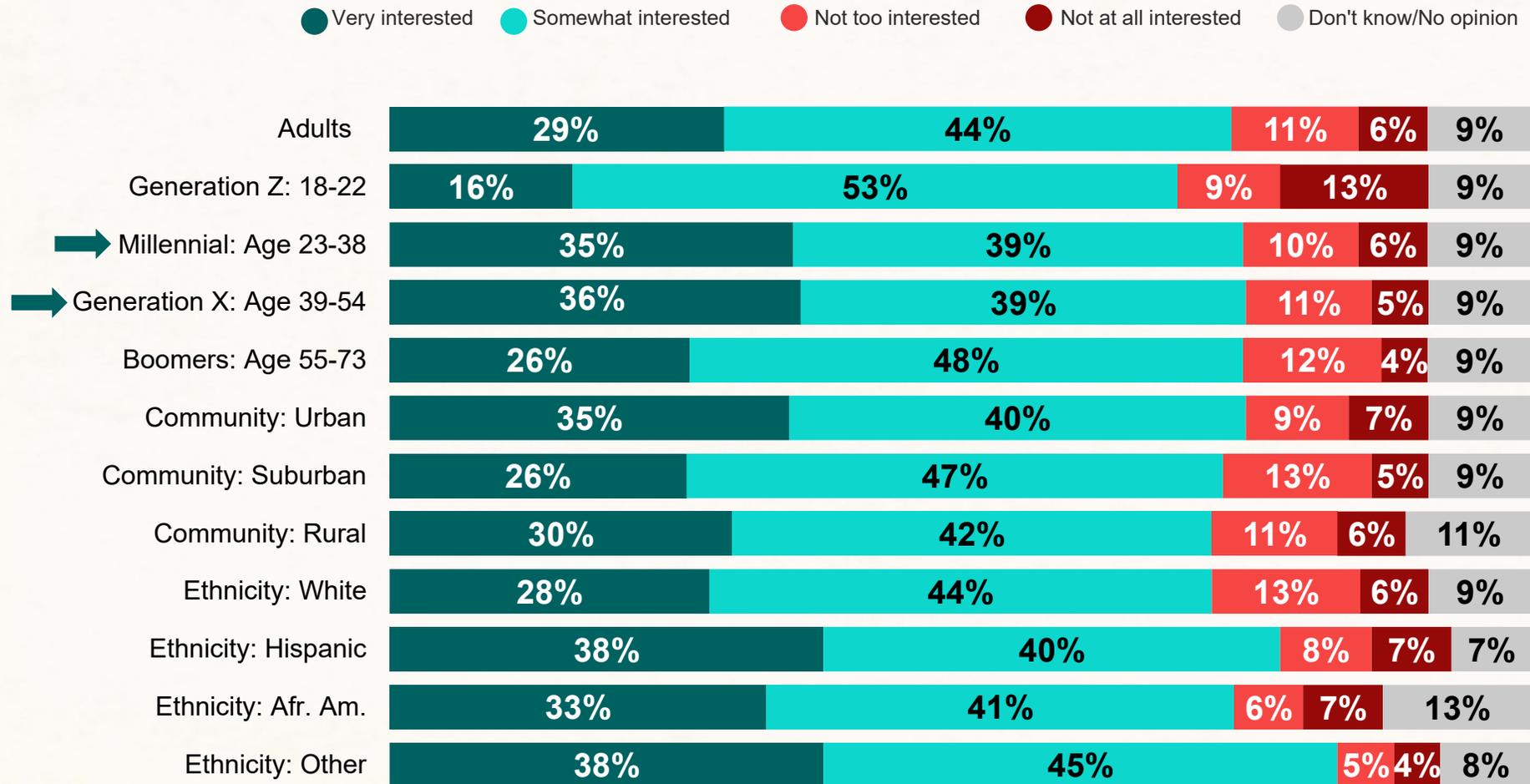
U.S. ADULTS



One in three Millennial (35%) and Gen X (36%) adults are *very interested* in learning more about how their food is produced.

How interested are you in learning more about how your food is produced?

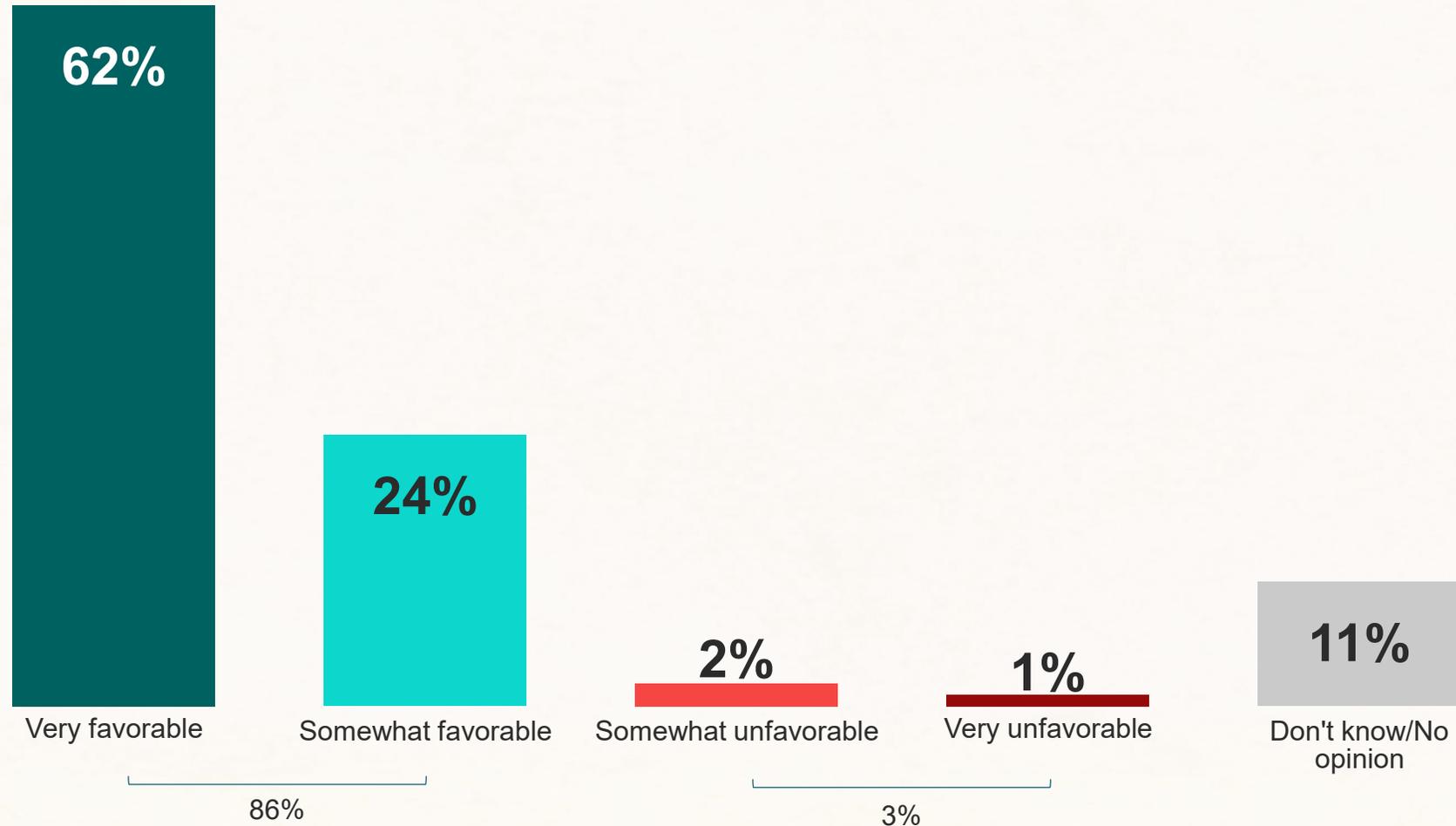
U.S. ADULTS



Three in five adults (62%) have a *very favorable* opinion of farmers.

Generally, do you have a favorable or unfavorable opinion of farmers?

U.S. ADULTS

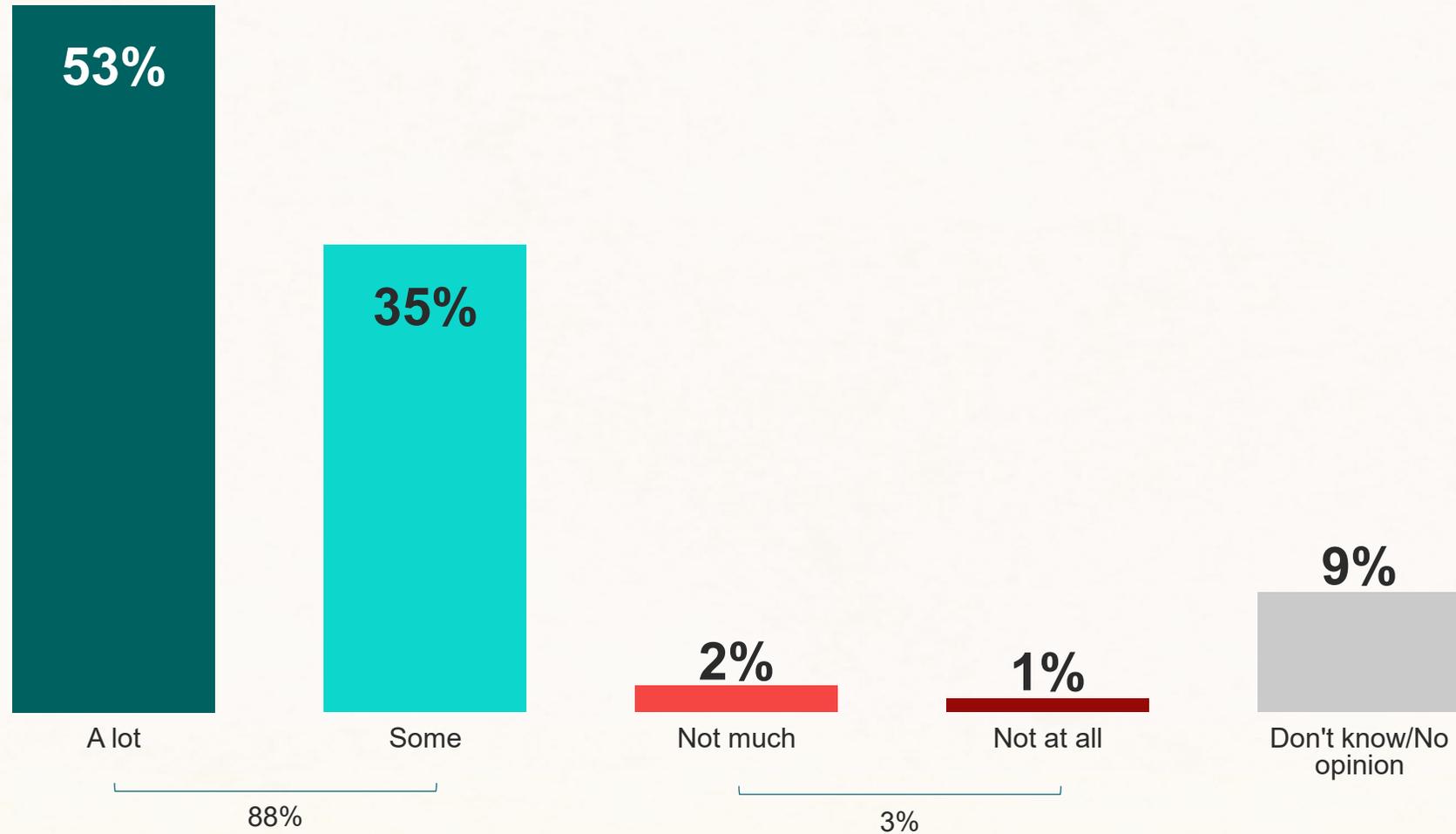


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Similarly, a strong majority of adults (88%) trust farmers.

How much do you trust farmers?

U.S. ADULTS



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A majority of adults (71%) trust modern agriculture.

Agriculture today looks very different than it did even 30 years ago. How much do you trust modern agriculture?

U.S. ADULTS

