

### About the Survey

FooDS tracks consumer preferences and sentiments on the safety, quality, and price of food at home and away from home with particular focus on meat demand. FooDS is a monthly on-line survey with a sample size of at least 1,000 individuals, weighted to match the US population in terms of age, gender, education and region of residence. See the [online technical document](#) for more details.

### MEAT DEMAND

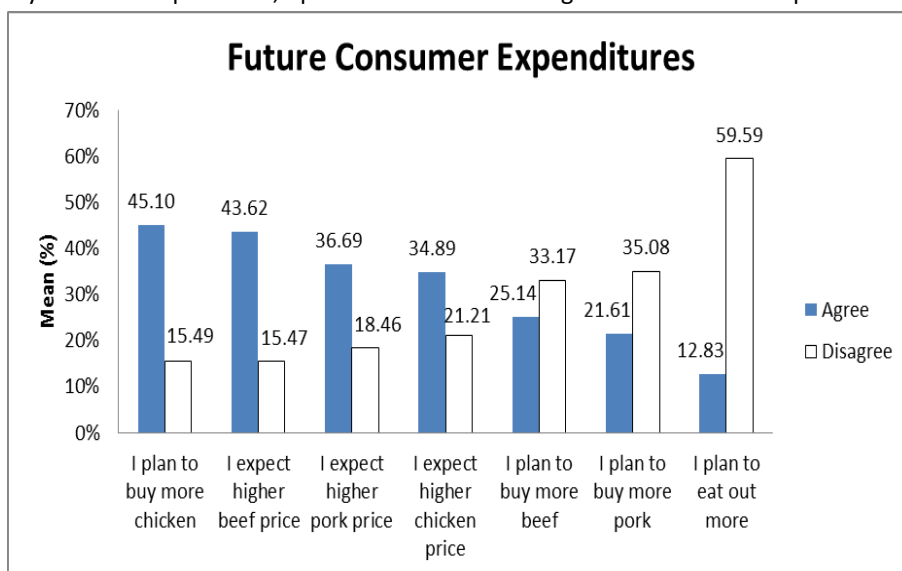
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
May 2013	\$7.03	\$5.03	\$4.21	\$3.91	\$2.28	\$2.07	\$1.92	\$1.86
June 2013	\$6.87	\$4.90	\$4.03	\$3.63	\$2.21	\$2.27	\$2.26	\$3.16
July 2013	\$6.20	\$4.99	\$4.14	\$3.47	\$2.47	\$2.13	\$2.30	\$2.74
% change (June – July)	-9.75%	1.83%	2.71%	-4.29%	11.78%	-6.21%	1.87%	-13.21%

In the past month, which included Independence Day, willingness-to-pay (WTP) varied amongst meat products. During July, WTP decreased for steak, pork chops and chicken wings, while an increase was seen for chicken breasts, hamburger and deli ham.

### FOOD EXPENDITURES

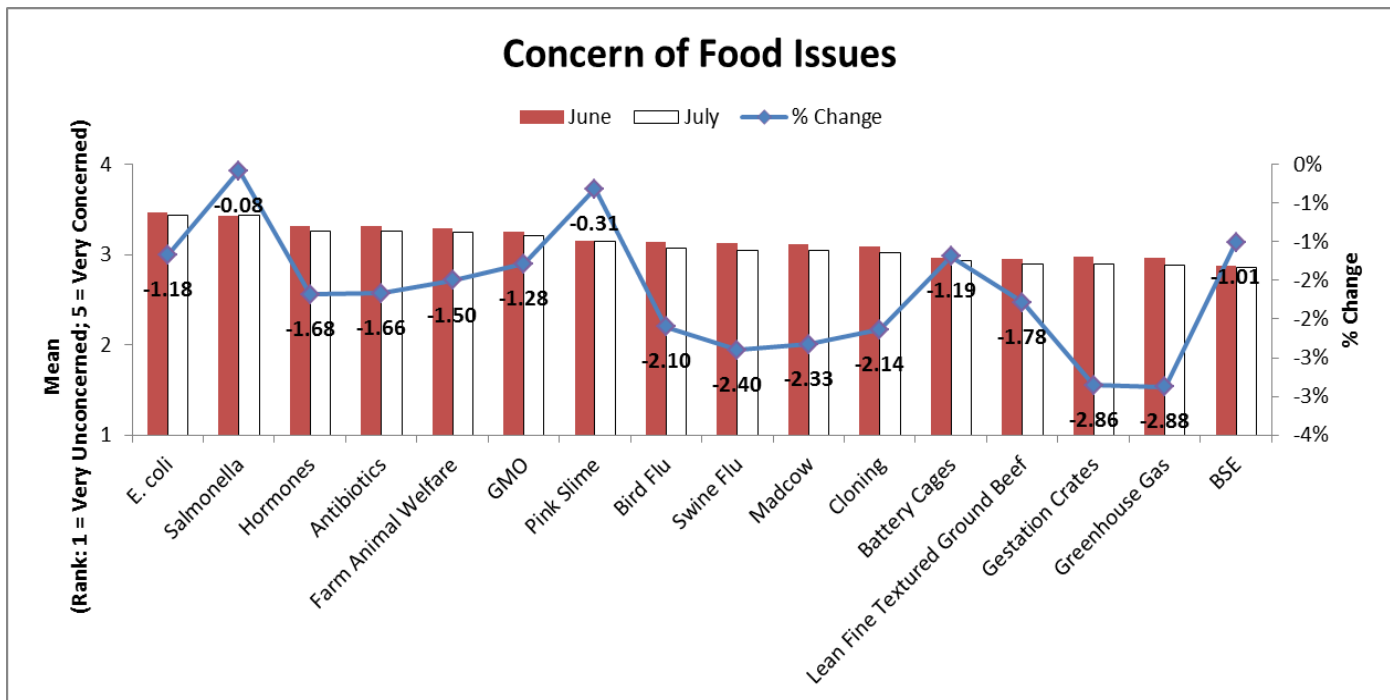
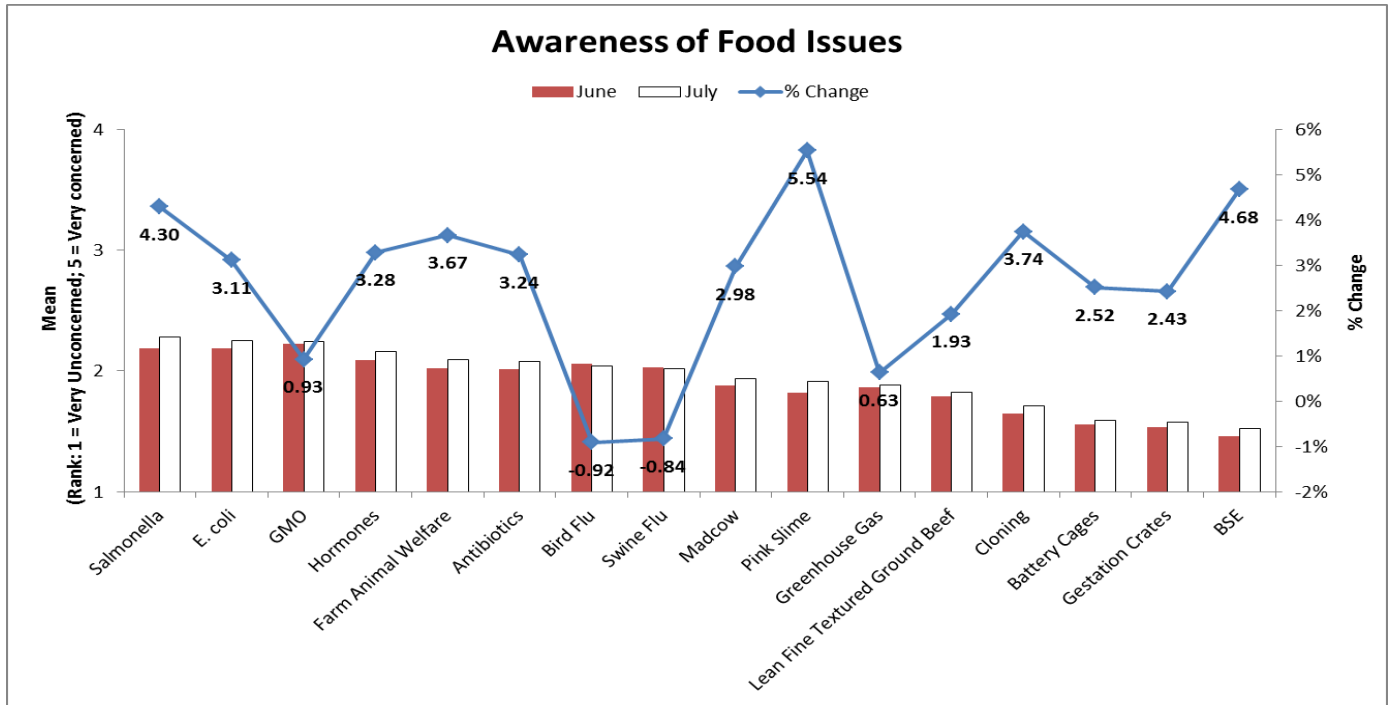
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
June 2013	\$92.54	\$43.60	-0.60%	-2.13%
July 2013	\$92.84	\$46.06	-0.74%	-2.40%
% change (June - July)	0.32%	5.64%	22.93%	12.77%

In July, reported average food-grocery expenditures were \$92.84, up 0.32% from June, while an average of \$46.06 was spent on food consumed away from home per week, up 5.64% from a month ago. Consumers anticipate spending less money on food purchased for at home and away from home consumption, but the expected decline increased during July for both categories. The anticipated fall in at home food expenditures grew by 22.93% and away from home food expenditures grew by 12.77%. In comparison to last month, fewer consumers stated that they expect to see a rise in meat prices.



### AWARENESS & CONCERN TRACKING

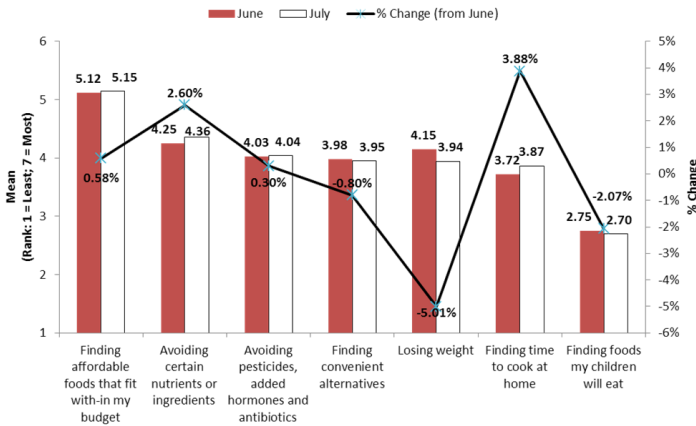
Consumer's concerns and values were similar in comparison to previous months. *E. coli*, Salmonella and the use of growth hormones in livestock were again consumer's top three concerns when purchasing food. Salmonella, *E. coli* and GMO's were reported to be the most discussed in the news over the last two weeks. In July, 3.88% of participants reported having food poisoning, a 22.55% decrease from June.



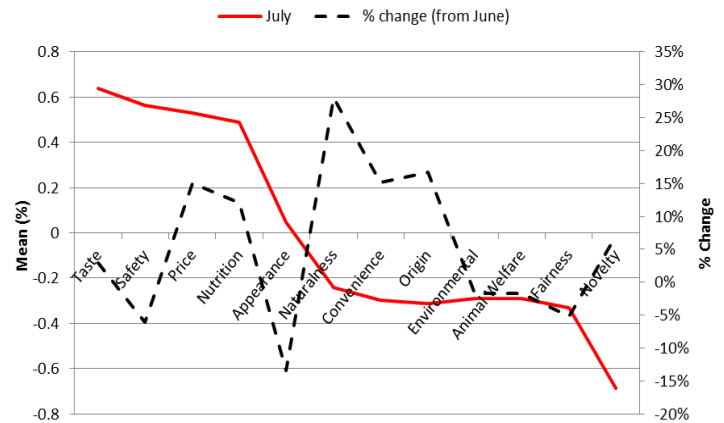
## GENERAL FOOD VALUES

Consumer values remained similar to those in past months, with a slight increase in perceived value of safety. Taste, safety and price remained most important to consumers when purchasing food. Again, consumers reported that their main challenge faced this month was finding affordable foods to fit within their budget. Finding the time to cook at home and finding food their children will eat were ranked last, as in the previous months.

### Consumer Challenges

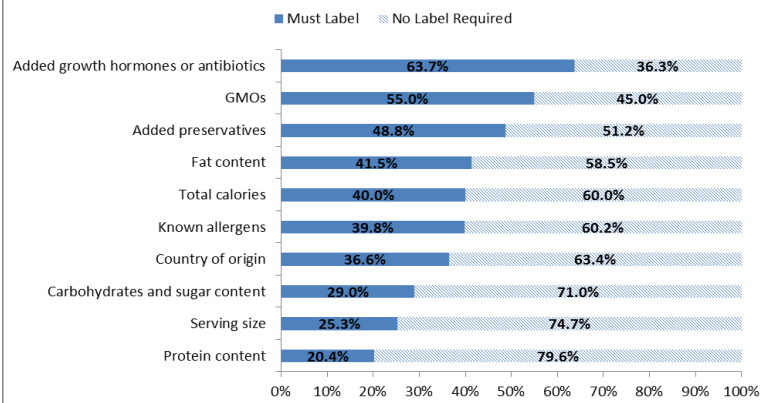


### Consumer Values



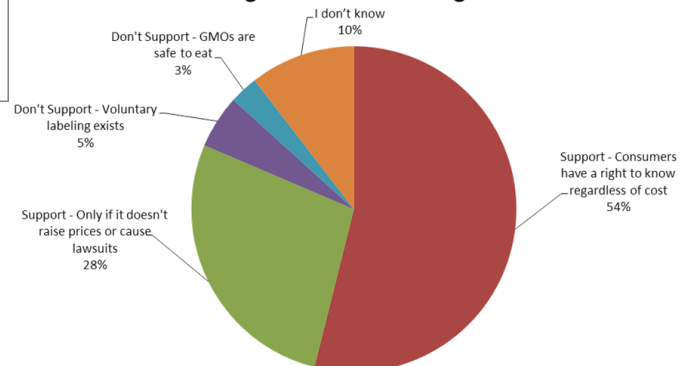
## Genetically Modified Organisms

### Food Label Requirements



Two new questions were added to the survey in July. Consumers were asked to report their beliefs on preference for food labels including genetically modified organisms (GMOs). Initially, consumers were asked which four (of ten) items should be required on labels. Surprisingly, the use of added growth hormones or antibiotics and GMOs were most preferred, even over fat content and total calories.

### Labeling of Foods Containing GMOs



Over half of the participants reported that they “support mandatory labeling because consumers have a right to know regardless of the cost”.