

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.

OVERALL COMMENTS

Significant moves were observed in several key variables this month. Changes are likely driven by consumer uncertainty regarding the government shutdown and by a widely publicized Salmonella outbreak associated with a California poultry processor, first reported by NBC's Today Show on October 9 and in the USA Today on October 8. The survey was in the field October 10-13, 2013.

MEAT DEMAND

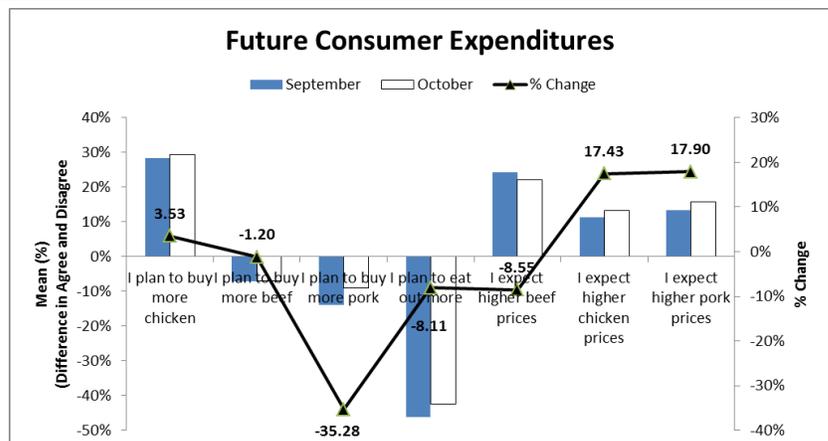
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
August 2013	\$6.60	\$4.90	\$4.11	\$3.85	\$2.57	\$2.39	\$2.29	\$2.82
September 2013	\$7.15	\$5.10	\$4.16	\$3.68	\$2.40	\$2.11	\$2.36	\$3.23
October 2013	\$6.74	\$4.91	\$3.92	\$3.80	\$2.25	\$2.12	\$2.18	\$2.71
% change (Sept. – Oct.)	-5.73%	-3.73%	-5.77%	3.26%	-6.25%	0.47%	-7.63%	-16.10%

The past month, there were significant reductions in willingness-to-pay (WTP) for most food products, including steak, chicken breast, hamburger, deli ham, beans and rice and pasta. WTP increases were only observed for pork chops and chicken wings.

FOOD EXPENDITURES

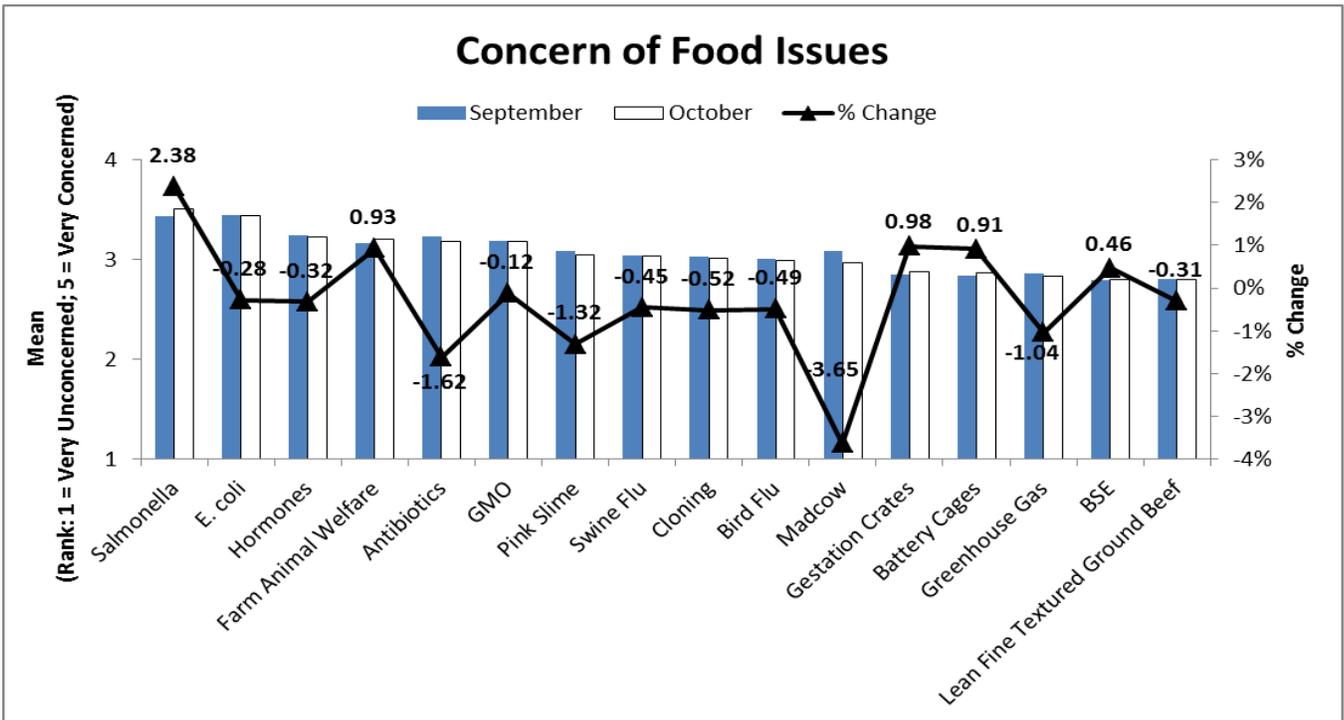
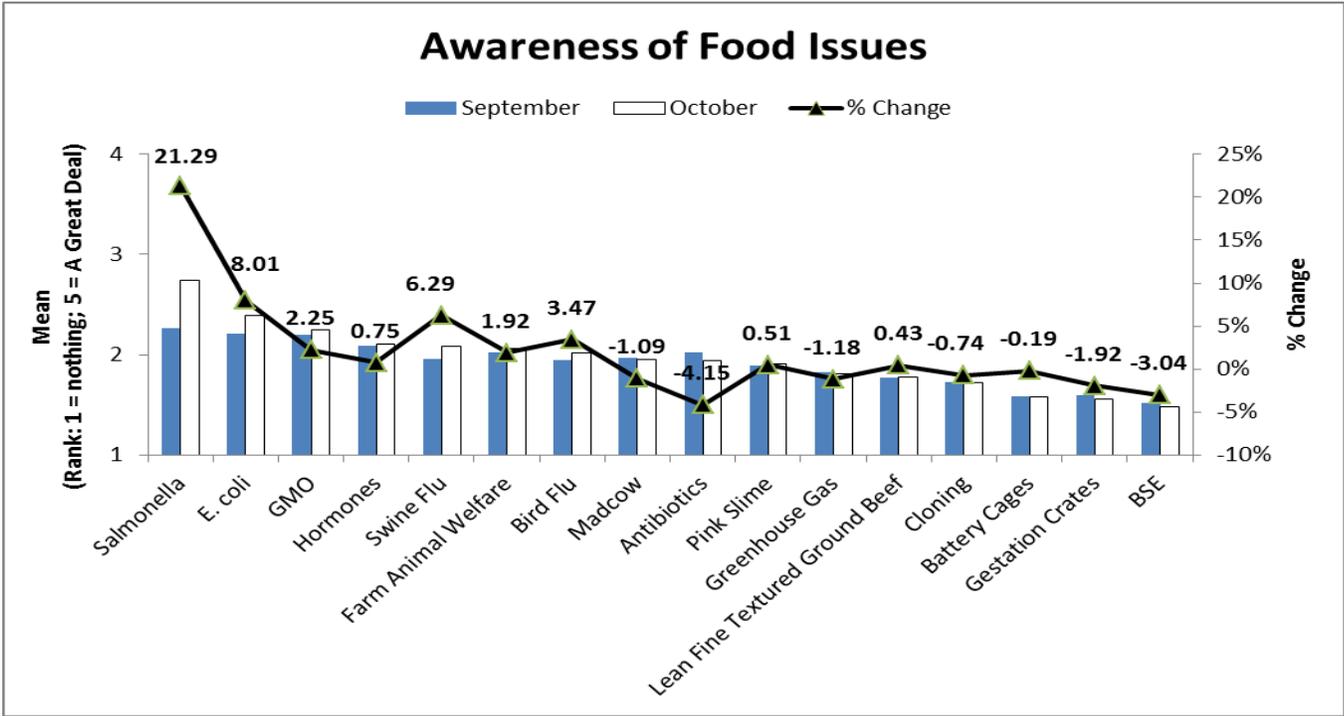
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
September 2013	\$93.33	\$45.63	-0.53%	-1.77%
October 2013	\$96.52	\$44.84	-0.85%	-1.79%
% change (Sept. – Oct.)	3.42%	-1.73%	60.38%	1.13%

In October, reported weekly food-grocery expenditures were \$96.52, up 3.4% from September, while an average of \$44.84 was reportedly spent on food consumed away from home per week, down 1.7% from a month ago. Consumers anticipate spending less money on food purchased for home consumption and slightly more money on away from home food consumption. Again, consumers reported that they expect to continue to see a rise in meat prices over the next month.



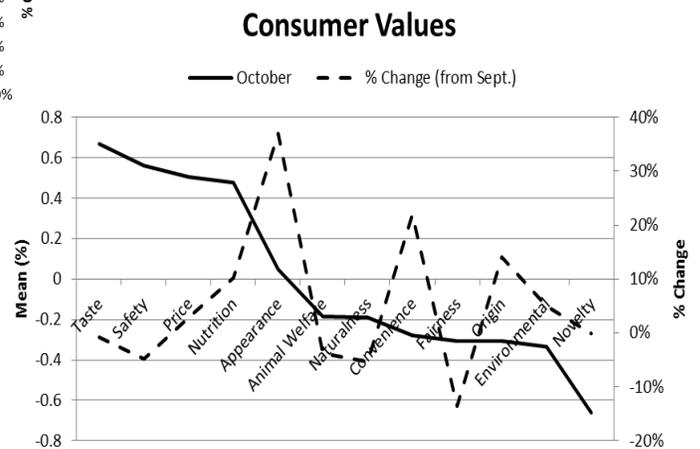
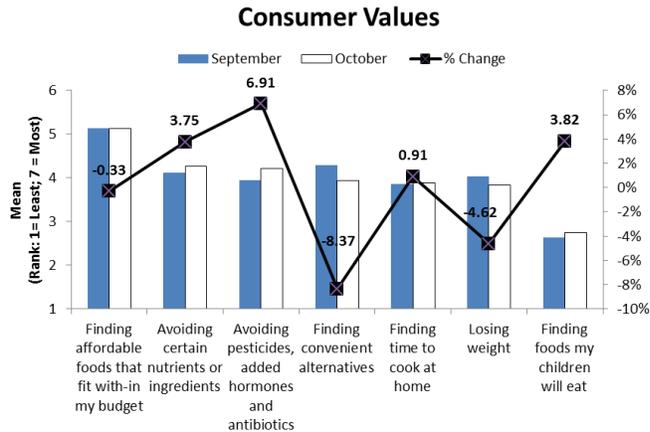
AWARENESS & CONCERN TRACKING

There was a dramatic (21.29%) increase in how much people said they heard about Salmonella, likely as a result of the recent outbreak. Additionally, *E.coli*, and GMO's were reported as being visible in the news over the last two weeks (a mandatory GMO labeling initiative is slated for vote in Washington State in November); The largest jump in awareness was for Salmonella, and the biggest fall was for antibiotics. Salmonella, *E. coli*, and hormones were again consumers' top three concerns when purchasing food; the biggest increases in concern occurred for Salmonella; and the biggest drop in concern was for mad cow disease.

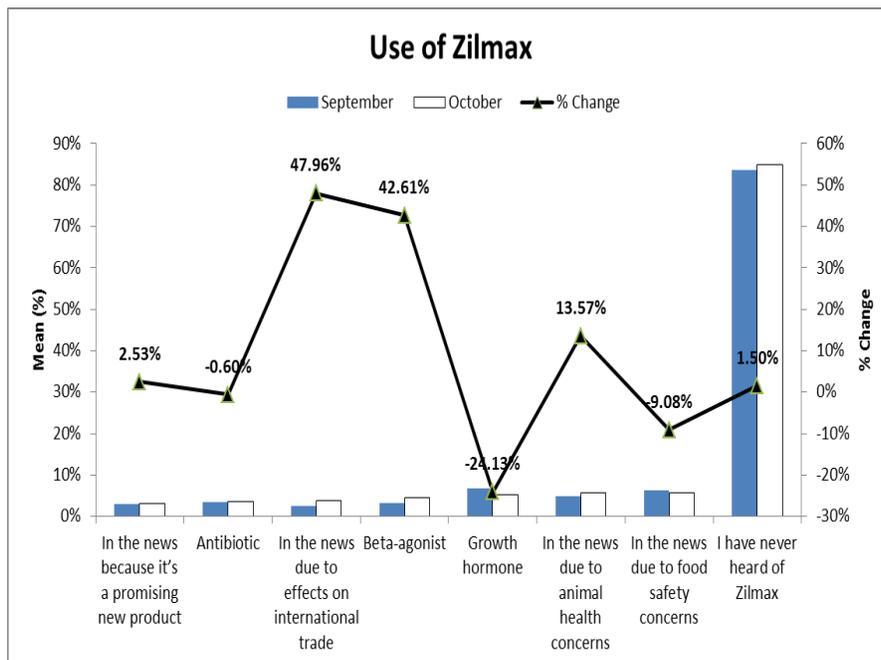


GENERAL FOOD VALUES

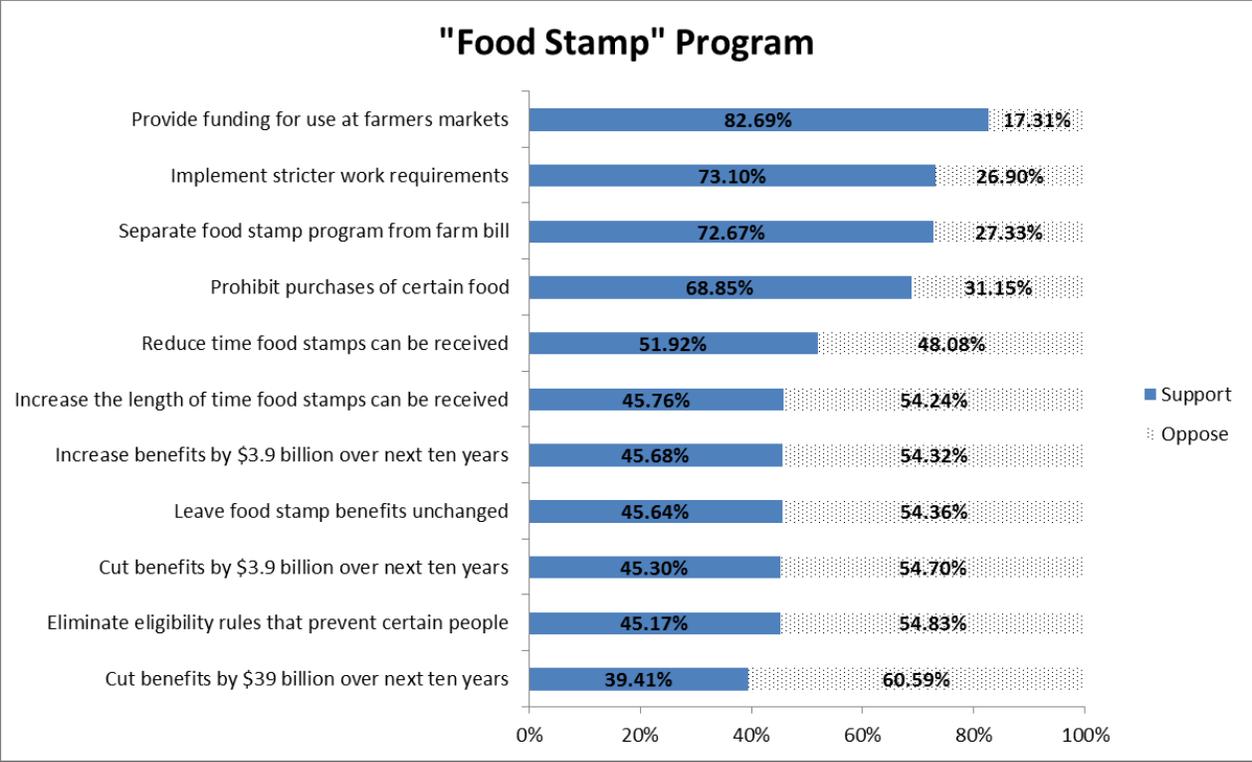
Consumer values remained similar to those in past months, with an increase in perceived value of appearance and convenience. Taste, safety and price remained most important to consumers when purchasing food. Again, consumers reported that the main challenge faced this month was finding affordable foods to fit within their budget. Losing weight and finding food their children will eat were ranked last. In October, 3.37% of participants reported having food poisoning, a 27.65% increase from September.



AD HOC QUESTIONS



Similar to last month, participants were asked whether they had heard of Zilmax, and if so, to “check all that apply” to indicate what they thought it was. In October, 84.9% of participants, up 1.50%, stated they “have never heard of Zilmax”. In comparison to last month, those who identified Zilmax as a growth hormone decreased by 24.13% and those who reported it was in the news decreased by 9.08%. The percent of participants who correctly identified Zilmax as a Beta-agonist or as recent news relating to animal health, increased compared to last month.



Two new, ad hoc questions were added to the survey in October. Participants were asked a series of questions relating to the Supplemental Nutrition Assistance Program (SNAP), otherwise known as the “food stamp” program. Respondents stated whether they “support” or “oppose” 11 different proposed changes to the program. More than half of the participants are in support of providing funding for the use of food stamps at farmers markets, implementing stricter work requirements, separating the food stamp program from the farm bill, prohibiting the purchase of certain food items and reducing the amount of time food stamps can be received.

The survey also asked “Are you in favor of the US government subsidizing farmers?” The percent of participants who answered “yes” was 52.18%.