

### 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

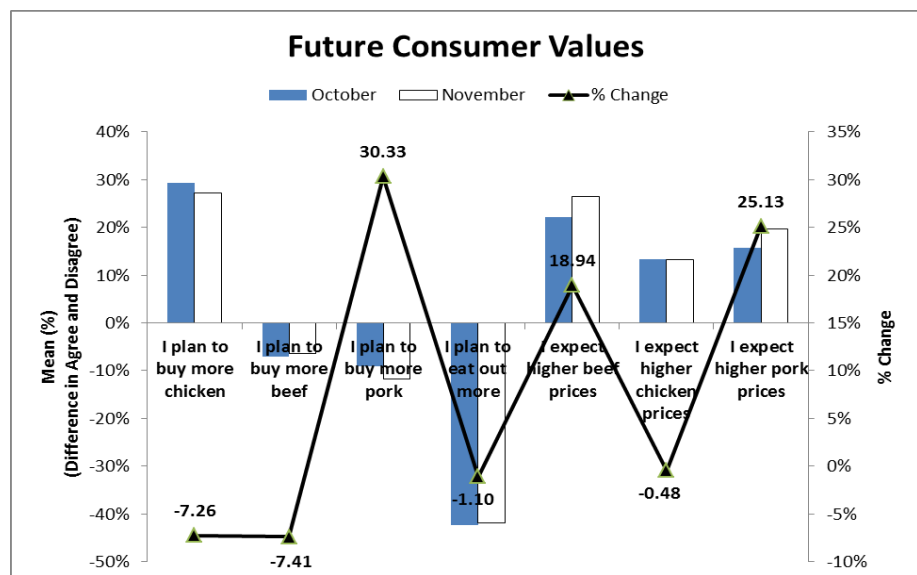
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
September 2013	\$7.15	\$5.10	\$4.16	\$3.68	\$2.40	\$2.11	\$2.36	\$3.23
October 2013	\$6.74	\$4.91	\$3.92	\$3.80	\$2.25	\$2.12	\$2.18	\$2.71
November 2013	\$6.71	\$5.03	\$3.97	\$3.75	\$2.59	\$2.37	\$2.22	\$2.77
% change (Oct. - Nov.)	-0.33%	2.50%	1.22%	-1.16%	14.88%	11.76%	2.04%	2.05%

The past month, there were increases in willingness-to-pay (WTP) for most food products, including sizable percentage increases for deli ham and chicken wing. WTP for steak is down from the September high but essentially unchanged from October to November. Pork chop experienced a small decline in WTP.

### FOOD EXPENDITURES

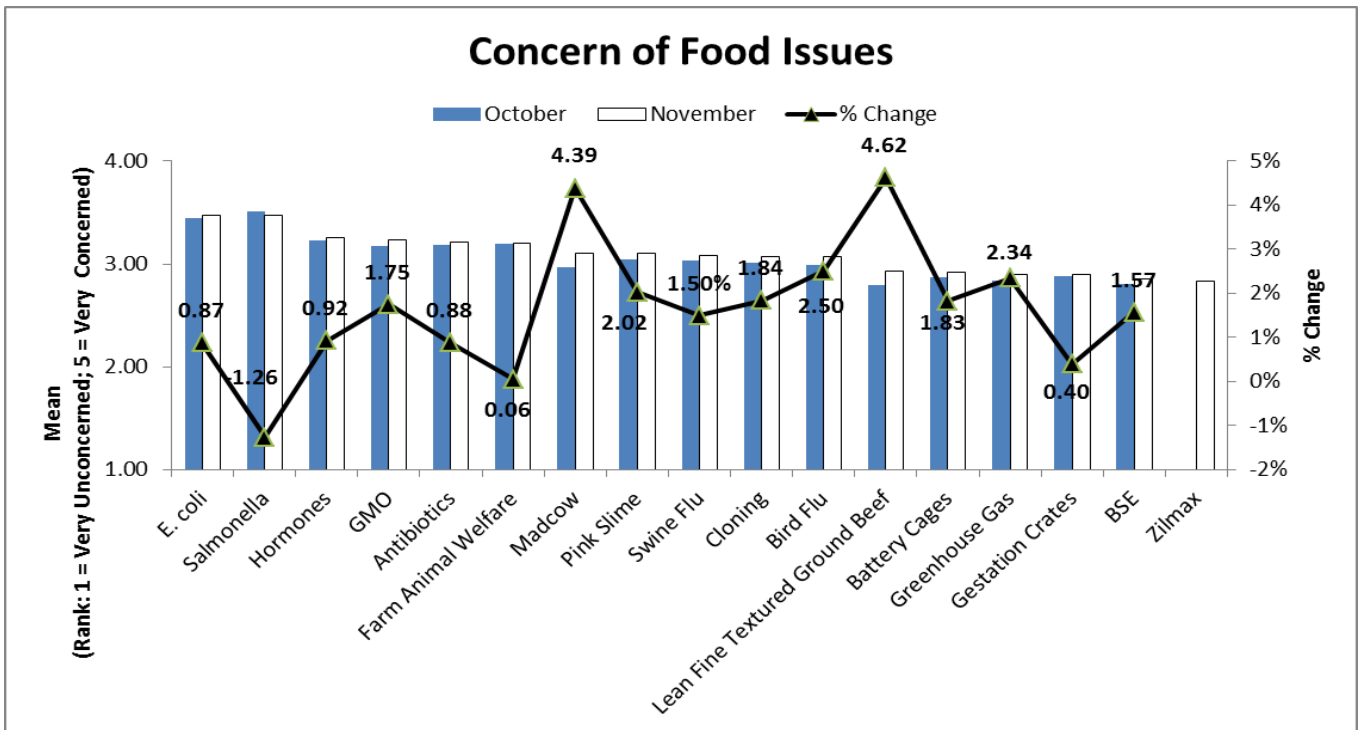
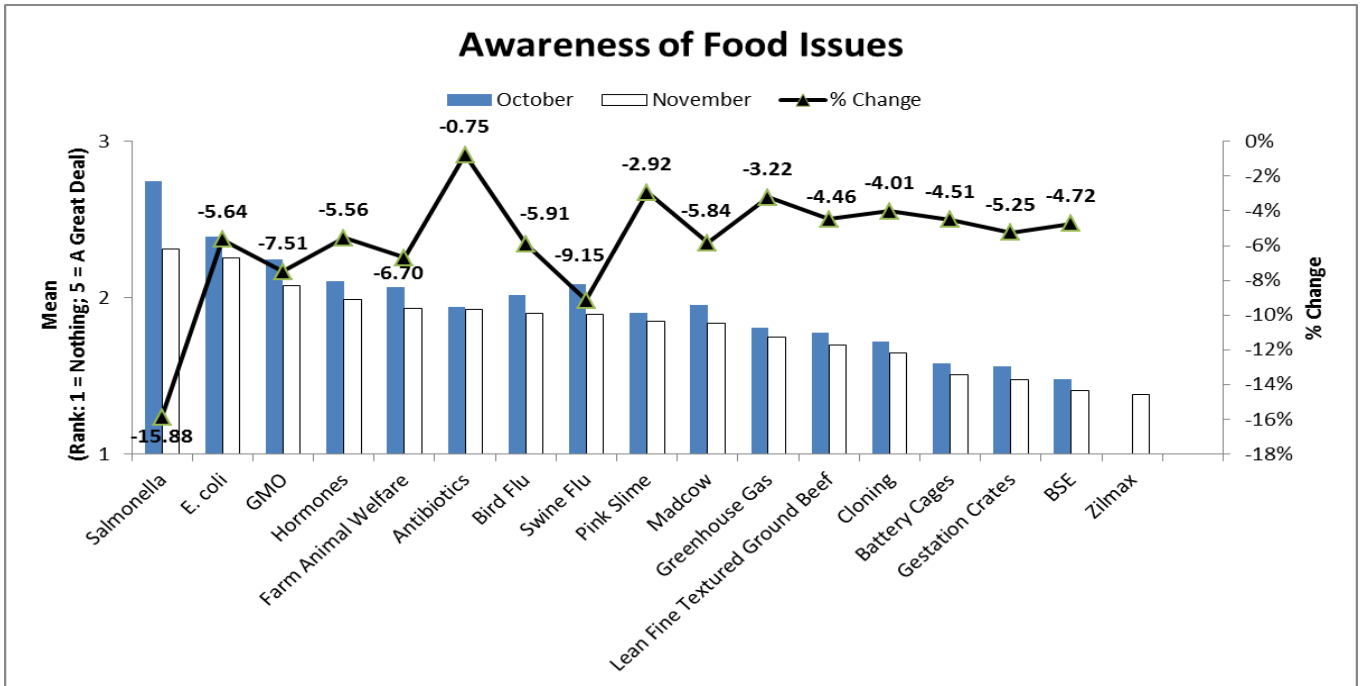
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
October 2013	\$96.52	\$44.84	-0.85%	-1.79%
November 2013	\$94.00	\$45.31	0.25%	-2.01%
% change (Oct. - Nov.)	-2.61%	1.06%		

In November, average food-grocery expenditures were \$94, down 2.61 % from October. \$45.31 was spent on food consumed away from home, up 1.06% from a month ago. Consumers anticipate spending more on food-at-home, moving from an expected decline of -0.85% in October to an increase of 0.25% in November. There were declines in plans to buy more chicken and pork, and consumers continue to expect meat price increases, particularly for beef and pork.



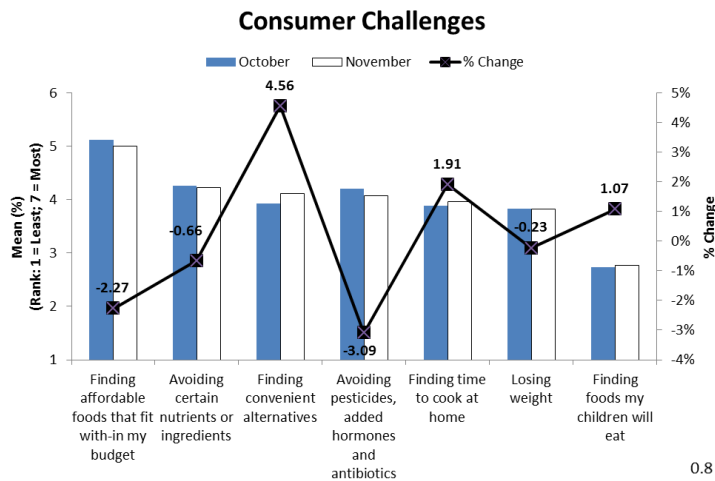
### AWARENESS & CONCERN TRACKING

Interestingly, consumers reported hearing less in the news about all 16 tracked food issues in November. The fall was particularly dramatic for *Salmonella*. *Salmonella*, *E.coli*, and GMOs were reported as most visible in the news over the last two weeks; the smallest percentage fall in awareness was for antibiotics. *E. coli*, *Salmonella* and hormones were again consumers' top three concerns. The biggest increases in concern occurred for lean finely textured ground beef, perhaps prompted by Cargill's announcement to label the ingredient. The biggest drop in concern was for *Salmonella*. This month "Zilmax" was added the Awareness and Concern Tracking Questions.

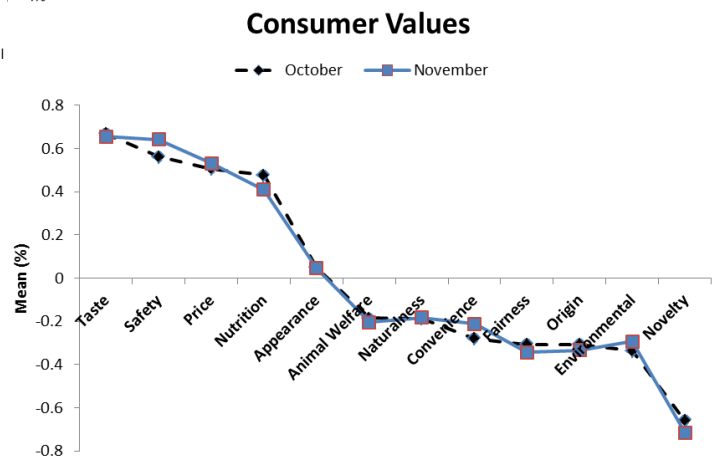


## GENERAL FOOD VALUES

Consumer values remained similar to those in past months, with an increase in perceived value of safety and convenience. 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, and there was a 4.56% increase in the average relative rank of “finding convenient alternatives.” Finding



affordable foods and avoiding pesticides, etc. were less important in November than in October. In November, 3.21% of participants reported having food poisoning, a 4.75% decrease from October.



## AD HOC QUESTIONS

Three new ad hoc questions were added to the survey in November. Participants were asked a series of questions relating to their knowledge and perceptions of USDA beef quality grades. The results of these questions will be reported in a later issue.