

### 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

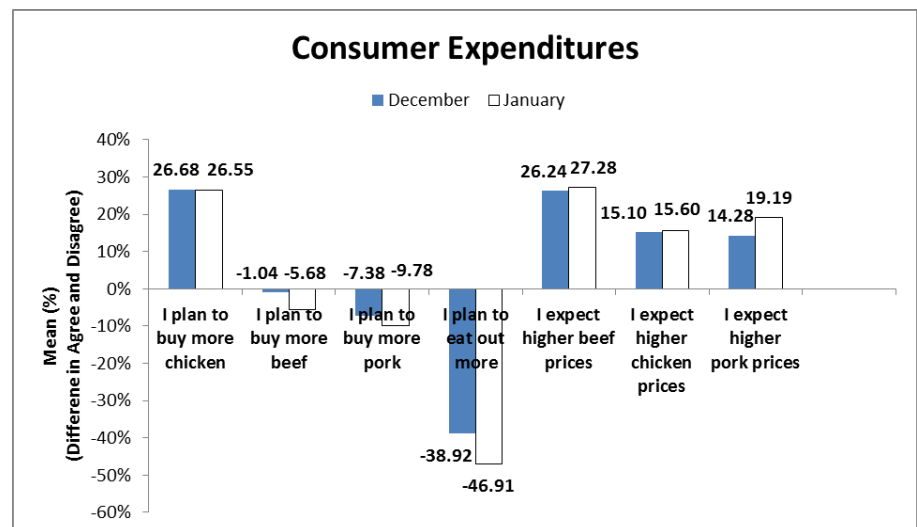
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
November 2013	\$6.71	\$5.03	\$3.97	\$3.75	\$2.59	\$2.37	\$2.22	\$2.77
December 2013	\$6.42	\$4.52	\$4.20	\$3.61	\$2.21	\$1.93	\$1.97	\$3.07
January 2014	\$6.91	\$4.68	\$4.21	\$3.54	\$2.23	\$2.26	\$2.15	\$2.58
% change (Dec. - Jan.)	7.63%	3.54%	0.23%	-1.94%	0.90%	17.10%	9.15%	-15.96%

Coming off lows in December, January witnessed increased willingness-to-pay (WTP) for meat food products, including a large percent increase for chicken wings and steak. Pork chop experienced a small decrease in WTP.

### FOOD EXPENDITURES

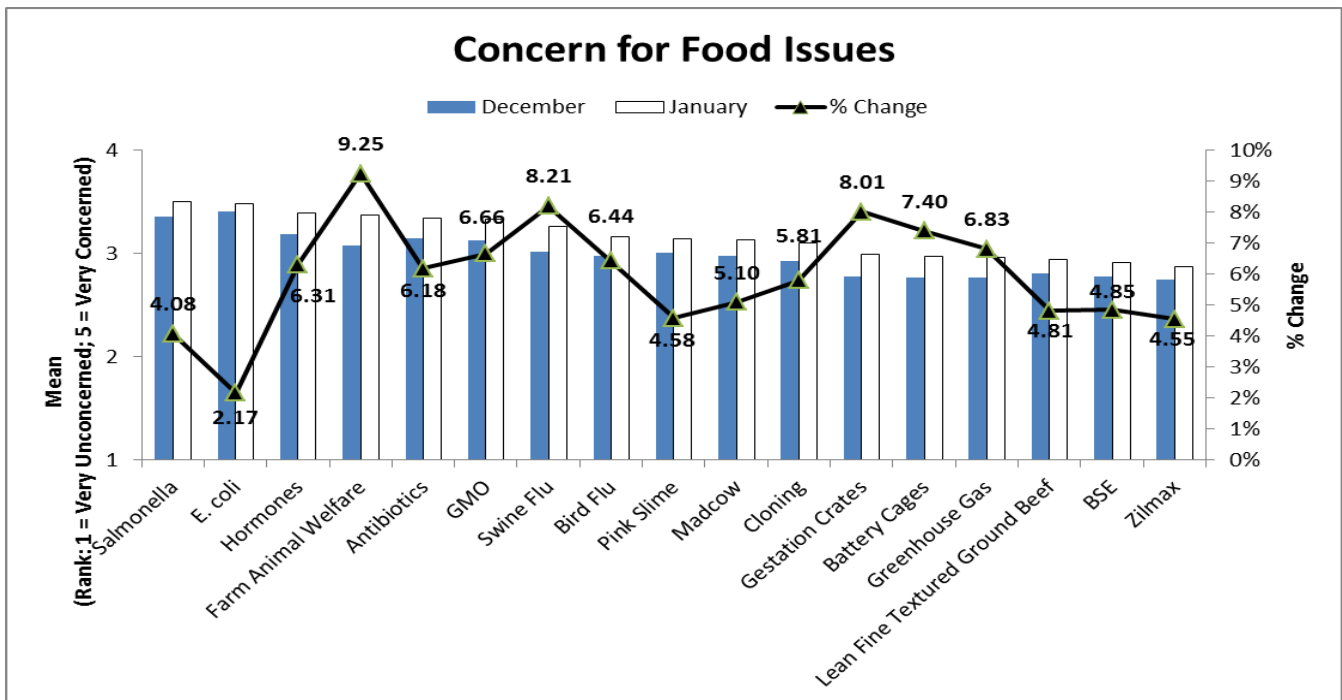
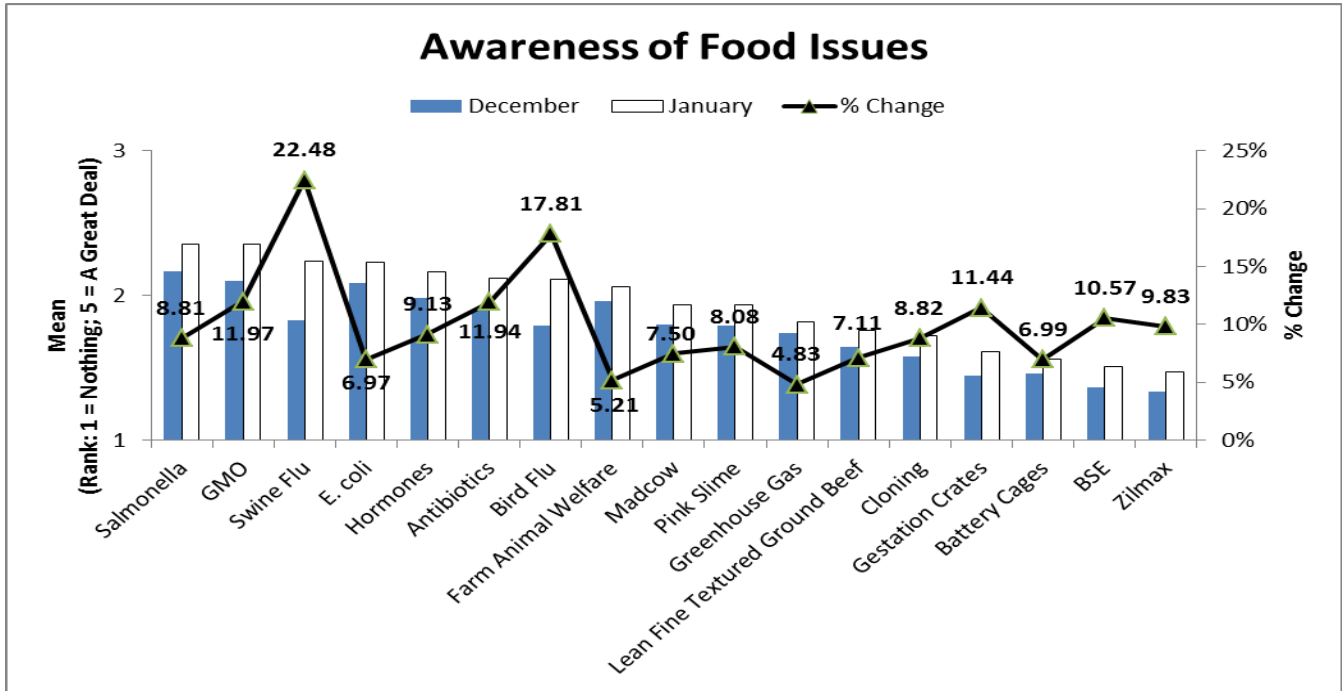
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
December 2013	\$91.40	\$43.95	0.21%	-1.63%
January 2014	\$92.11	\$45.54	-0.65%	-1.93%
% change (Dec. - Jan.)	0.78%	3.61%		

In January, food-grocery expenditures were \$92.11, up slightly from December, while \$45.54 was spent on food consumed away from home, up 3.61% from December. Consumers anticipate eating out less often and spending less money doing so. Consumers expect higher beef, chicken, and pork prices in the coming weeks. Consumers expect to buy less beef and pork in the coming weeks relative to December.



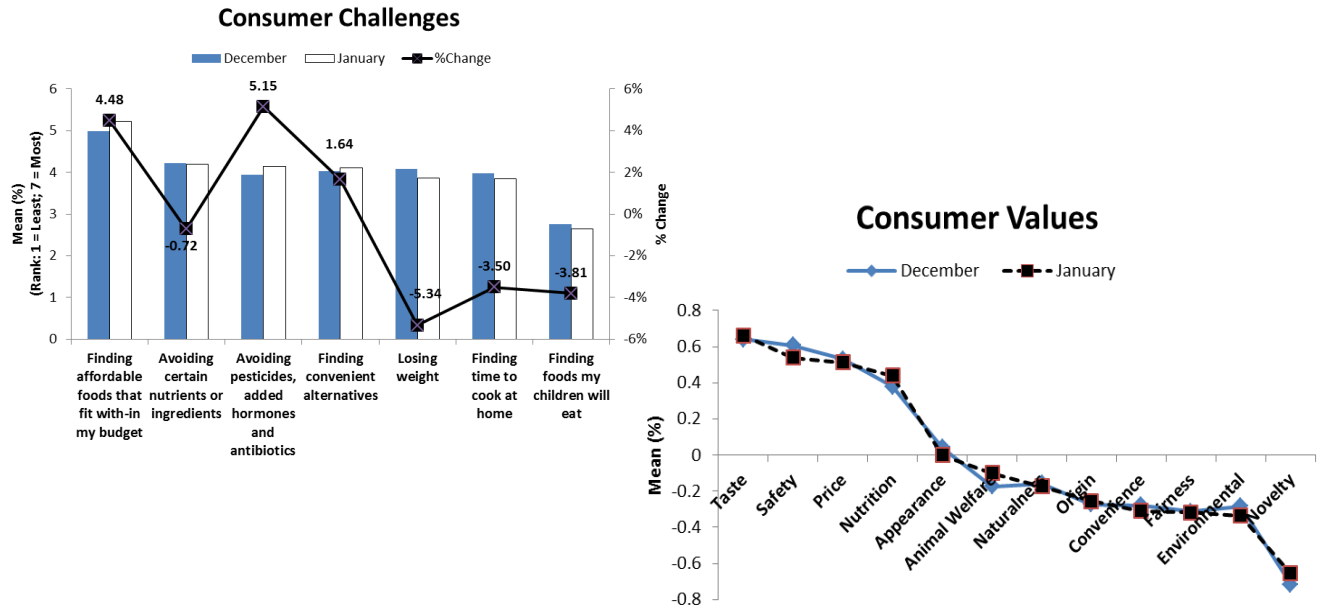
### AWARENESS & CONCERN TRACKING

Consumers stated seeing more in the news about all food issues in January. The largest jumps were for swine flu and bird flu. Salmonella, *E. coli* and hormones remained consumers' top three concerns when purchasing food. Concern for all issues also rose in January, with the largest percent increase occurring for farm animal welfare, swine flu, and gestation crates. Concern for Salmonella and *E. Coli* experienced the smallest percentage gains.



## GENERAL FOOD VALUES

Taste, safety and price remained most important values to consumers when purchasing food. Consumer values remained similar to those in past months, with a slight decrease in perceived value of safety and an increase in perceived value of animal welfare. Again, consumers reported that their main challenge faced this month was finding affordable foods. Finding time to cook at home and finding food their children will eat were ranked last. The challenge of avoiding pesticides, added hormones and antibiotics experienced the largest increase in January. In January, 3.4% of participants reported having food poisoning, a 6.59% decrease from December.

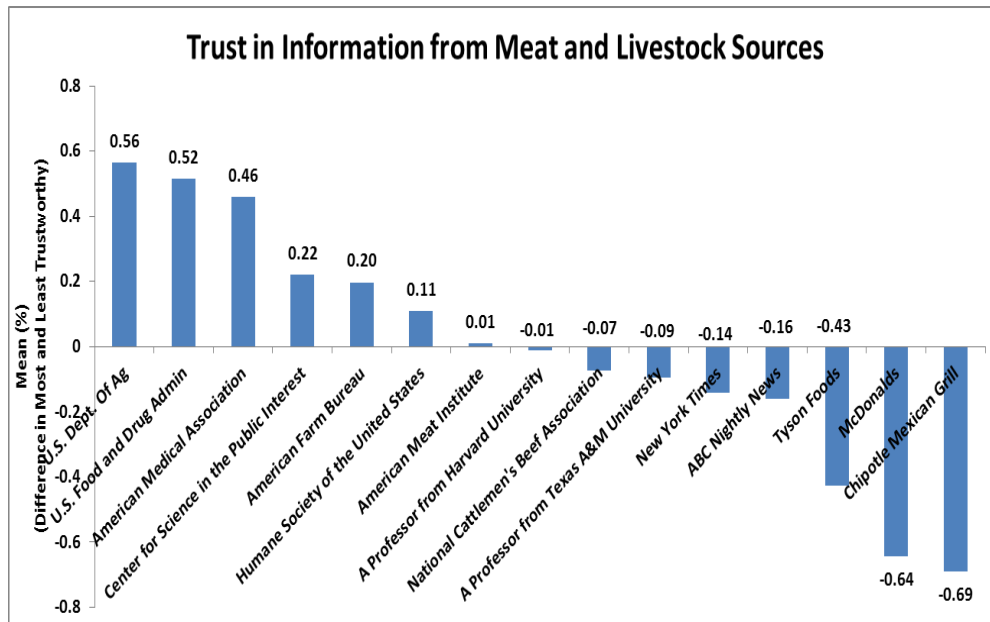


## AD HOC QUESTIONS

Three new ad hoc questions were added to the survey in January.

First, participants were asked “How trustworthy is information about meat and livestock from the following sources?” 15 sources were listed (the order randomly varied across respondents), and respondents had to place five sources in the most trustworthy category and five sources in the least trustworthy category.

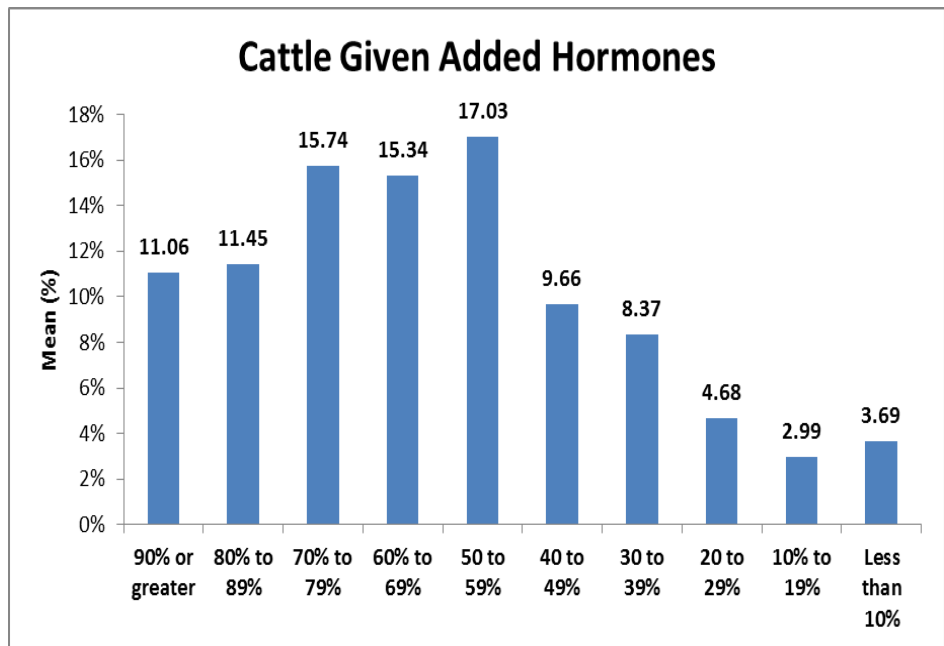
A scale of importance was created by calculating the proportion of times a meat and livestock information source as ranked most trustworthy minus the proportion of times it was ranked least trustworthy.



The USDA and FDA were reported as most trustworthy with 50% more people indicating the source as most trustworthy than least. A University professor from Harvard were seen as slightly more trustworthy than one from Texas A&M, but both were viewed as less trustworthy than the Farm Bureau, the CSPI, or the HSUS.

News organizations, and particularly food companies, were viewed as least trustworthy. Chipotle was the seen as the least trust worthy organization studied – the restaurant chain was placed in the least trustworthy category 69% more often than in the most trustworthy category.

Secondly, participants were asked “What percent of cattle in the United States are given added hormones to speed growth and muscle development?” 11.06% of participants stated that 90% or more U.S. cattle are given hormones. However, 3.69% of participants stated that less than 10% are given added hormones. In general, respondents tended to perceive a much lower level of growth hormone use in cattle production than is actually the case. About 31% of respondents thought that less than half of cattle in the U.S. are administered added hormones.



Finally, the survey also asked an open-ended question: “Do you have any food-related goals for the new year?” Over 56% of participants answered “yes” or stated a specific goal.

A keyword search was conducted. Below is a count of the occurrences of different key words among responses. Some of the main keywords mentioned were: healthier (81), weight (79), meat (43), cook (17), organic (19),

#### Healthier Eating

Keyword	Mentions
Healthier	81
Healthy	15
Cook	11
Eat better	7

Weight loss

<b>Keyword</b>	<b>Mentions</b>
Weight	79
Eat Less	61
Diet	16
Pounds	15
lbs	6
Calorie	8
exercise	2

Meat

<b>Keyword</b>	<b>Mentions</b>
Meat	43
Beef	13
Chicken	17
Pork	10

*Eat more vegetables and fruits*

<b>Keywords</b>	<b>Mentions</b>
Vegetable	28
Fruit	24
Veggie	12
Fresh	12
Vegetarian	5

*Eat more organic, non-GMO, local*

<b>Keywords</b>	<b>Mentions</b>
Organic	19
GMO	8
Natural	8

*Food Choices*

<b>Keywords</b>	<b>Mentions</b>
Fat	35
Sugar	24
Carb	21
Processed	15
Salt	11
Sodium	6
Trans Fat	6
Fast food	6
Soda	5

## Spending

Keywords	Mentions
save	3
pay	2
income	2
Price	1
debt	1
Cost	1
Budget	1

Individual responses were placed into seven different categories. Below are the general categories, with the number of comments in the category and a few representative responses. Typos are not corrected.

1. Healthier eating
  - a. 114 responses
  - b. Example responses
    - i. "Eat a lot healthier"
    - ii. "yeap, to become healthier but also tasting newgood foods."
    - iii. "to stay healthy be better then I felt last year keep up the good work"
    - iv. "Cook at home more from scratch"
2. Weight loss
  - a. 122 responses
  - b. Example responses
    - i. "Lose 10lbs"
    - ii. "I plan to go on a diet to loose weight."
    - iii. "Lose some weight"
    - iv. "Cut back on calories"
3. Meat
  - a. 39 Responses
  - b. Example responses
    - i. "more white meat products"
    - ii. "yes to cut my diet down to only 25 percent meat, and also to eat nothing processed."
    - iii. "We would like to avoid beef and eat more chicken and pork."
    - iv. I definitely want to buy antibiotic free meat and hormones."
    - v. "avoid meat withy salt brine injections"
4. Food Choices
  - a. 36 responses
  - b. Example responses
    - i. "Healthier, low fat, low sodium and low sugar."
    - ii. "Keep using low fat and sodium foods."
    - iii. "lose weight and eat foods with low cholesterol/low fat/less salt/ and less sugar."
    - iv. "low sugar, low salt, low carbs, lose weight"

5. Eat more organic, non-GMO, local
  - a. 22 responses
  - b. Example responses
    - i. "Eat healthier foods. Try to avoid GMO's and foods with antibiotics or pesticides. Try to eat as much organic food and food that we grow as possible."
    - ii. "Loose weight, eat raw, organic, and locally grown types of food."
    - iii. "Continue to buy organic and natural foods when I can."
    - iv. If my income increases (I just started a new job), I would like to be able to focus on eating local, organic, and humanely raised foods, even when eating out. I have not had much of a choice, eating responsibly is more expensive than eating whatever crap is on sale."
6. Eat more vegetables
  - a. 10 responses
  - b. Example responses
    - i. "Eat more fruits and vegetables and less bread"
    - ii. "be vegetarian"
    - iii. "To eat more vegetables, fruits and to drink more water."
    - iv. "we are vegetarians and always seek out new ways to eat and prepare veggies."
7. Spending
  - a. 9 responses
  - b. Example responses
    - i. "Try to reduce my costs as much as possible."
    - ii. "To pay less for food. Shop the sales."
    - iii. "Save as much money by looking for deals and using coupons as possible"
    - iv. "reduce debt"
8. Interesting or curious responses
  - a. "Yes. Avoid all GMO/Genetically Modified foods/organisms. Avoid hybridized foods like wheat. Avoid corn, soybeans and soy products, crooked neck yellow squash, canola, soybean, cottonseed and other cheap, contaminated GMO modified oils and foods. Avoid any foods raised with hormones, GMO's, BGH, pesticides, herbicides, (especially Roundup, arsenic, etc.), artificial fertilizers, caged, mistreated and improperly raised animal, high fructose corn syrup, sugar, agave syrup, corn syrup, MSG, artificial sweeteners, colors, flavorings, additives, excitotoxins, modified plant protein, casein, cane or other sugars, maltodextrin, magnesium stearates, stearic acid, other stearates, titanium dioxide and other whitening agents, bleaches, chlorine, fluorine, mercury, aluminum, cadmium, arsenic, lead, BHT, irradiated foods, foods from Japan, Hawaii, Mexico and surrounding areas (nuclear contamination), vaccines, toxic pharmaceutical drugs. factory farmed foods, etc.."
  - b. "Contribute to sustainable farming and agriculture"
  - c. "Eat all the things I like, in moderation, that I can afford, irrespective of being beneficial to my health. I don't specifically eliminate a particular food because someone that claims to be an expert, says that I should. Over the years, many things that have been said were bad for you have turned out to be just the opposite. I've never tried genetically engineered corn, wheat, etc. but I would, as long as it doesn't kill me, just to see how it tasted."
  - d. "I hope to lose weight, but thats the goal every new year which is never met"