

### 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

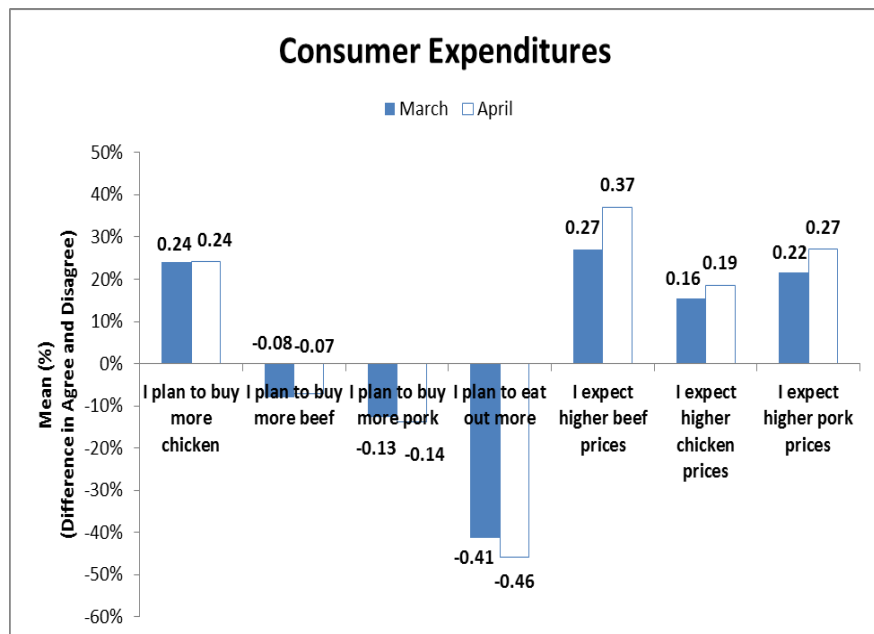
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
February 2014	\$6.87	\$5.04	\$4.06	\$3.47	\$1.97	\$2.51	\$2.04	\$2.65
March 2014	\$6.59	\$4.86	\$4.28	\$3.55	\$2.20	\$2.02	\$1.57	\$2.75
April 2014	\$6.87	\$4.98	\$4.17	\$3.76	\$2.42	\$2.27	\$2.19	\$2.71
% change (March - April)	4.25%	2.47%	-2.57%	5.92%	10.00%	12.38%	39.49%	-1.45%

In the past month, willingness-to-pay (WTP) increased for most meat products, with a large percent increase for deli ham and chicken wings. WTP for steak rose back to its February level; hamburger WTP decreased slightly in April.

### FOOD EXPENDITURES

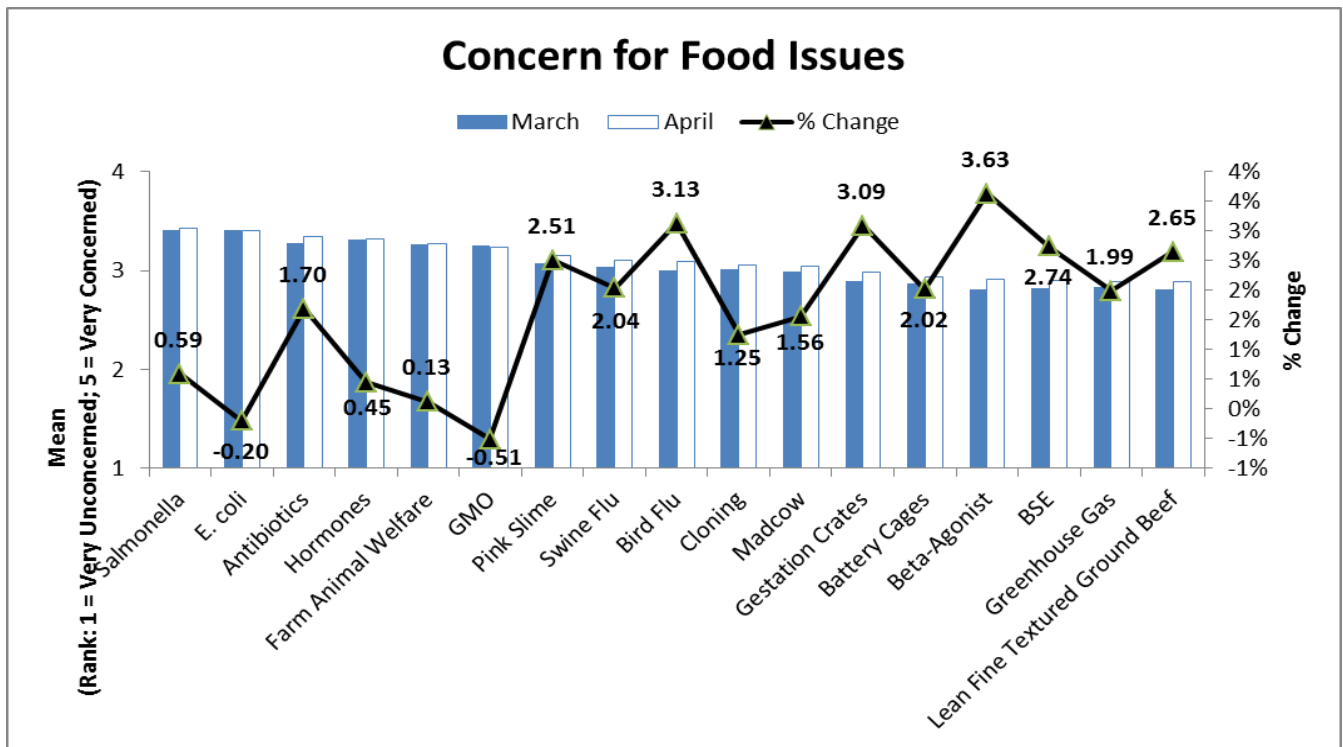
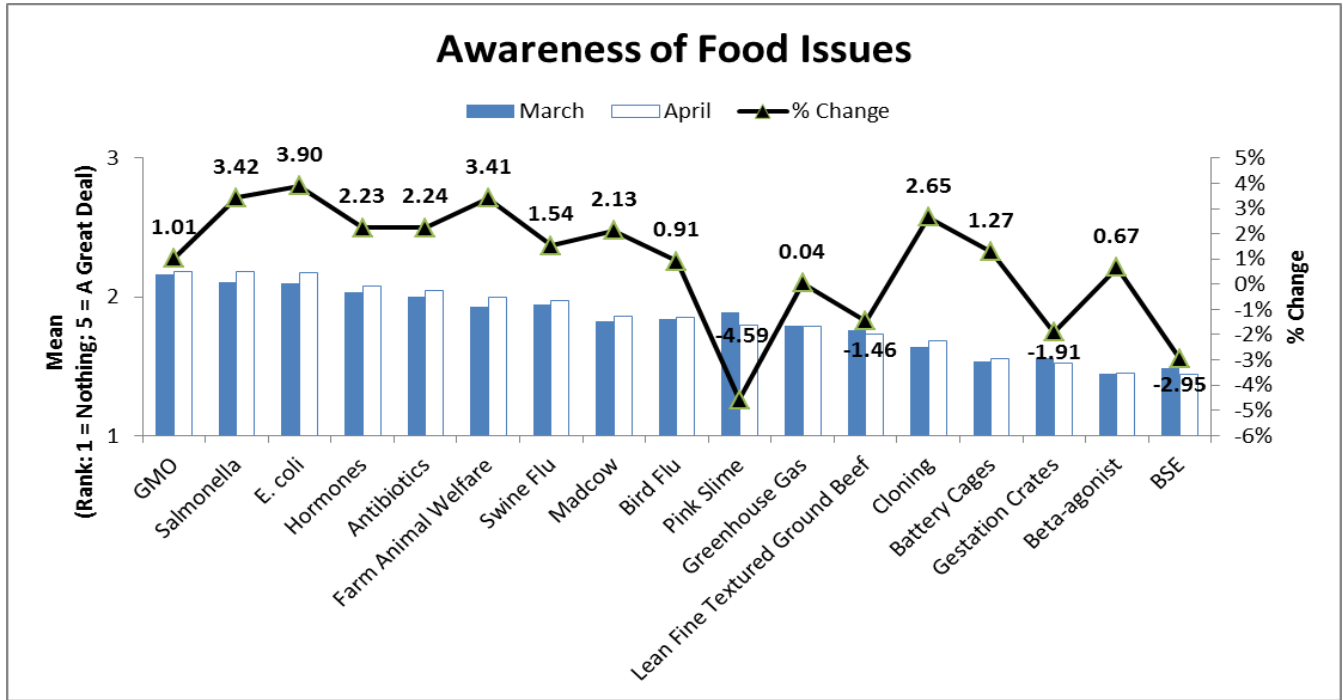
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
March 2014	\$95.32	\$48.66	-0.35%	-1.34%
April 2014	\$91.68	\$45.57	-0.16%	-1.51%
% change (March - April)	-3.82%	-6.35%		

In April, food-grocery expenditures were \$91.68, down 3.82% from March, while \$45.57 was spent on food consumed away from home, down 6.35% from March. Consumers anticipate eating out less often and spending less money doing so. Consumers expect to see higher meat prices, especially for beef for the coming weeks. Planned purchases for beef, pork, and chicken are steady despite the increased price expectations.



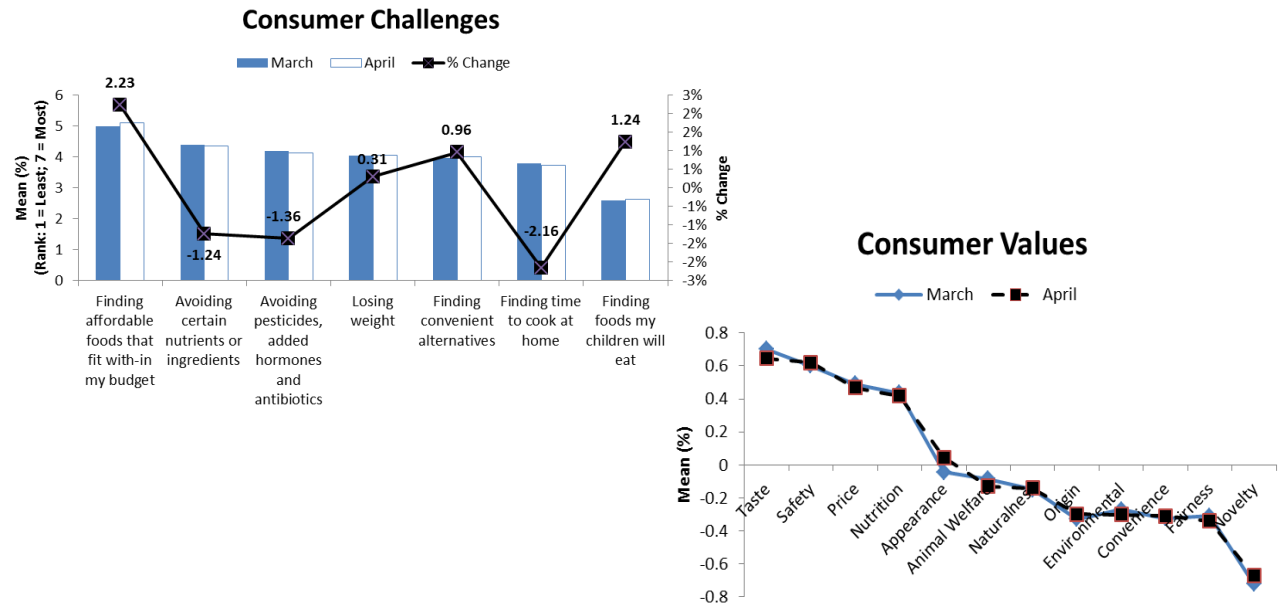
### AWARENESS & CONCERN TRACKING

GMOs, Salmonella, and *E. coli* were reported as most visible in the news over the last two weeks. The largest jump in awareness was for *E. coli* and Salmonella. And the biggest fall was seen in pink slime. Salmonella, *E. coli*, and antibiotics were participant's top three concerns for April. Concern for GMOs and *E. coli* saw the largest percent decrease from March, while beta-agonist and bird flu saw the largest percent increases from last month.



## GENERAL FOOD VALUES

Taste, safety, and price remained consumer's most important values when purchasing foods. Consumer values remained similar to those in past months, with a slight decrease in perceived value of taste and price and an increase in perceived value of safety and appearance. Again, consumers reported that their main challenge faced this month was finding affordable foods. Similar to previous months, finding time to cook at home and finding food children will eat were ranked last. The challenge of finding affordable foods experienced the largest increase, up 2.23% from March; while finding time to cook at home saw the largest decrease, down 2.16%. In April, 3.56% of participants reported having food poisoning, a 14.83% increase from March.



## AD HOC QUESTIONS

Two sets of ad hoc questions were added to the survey in April.

### Nutritional Labeling

The Food and Drug Administration (FDA) has announced plans to modify the nutrition facts panel. An FDA [website](#) shows an example of the new, proposed label along with an example of the current label. Respondents were shown the images of the two nutrition facts panels and were asked which of the two they preferred (or whether they were indifferent). The images were randomly ordered across surveys. Over half of the participants, 57%, indicated a preference for new, proposed label, 25% indicated a preference for the current label, and the remaining 18% indicated indifference.

<b>Nutrition Facts</b>	
Serving Size 2/3 cup (55g)	
Servings Per Container About 8	
Amount Per Serving	
<b>Calories</b> 230	Calories from Fat 40
<b>% Daily Value*</b>	
<b>Total Fat</b> 8g	<b>12%</b>
Saturated Fat 1g	<b>5%</b>
Trans Fat 0g	
<b>Cholesterol</b> 0mg	<b>0%</b>
<b>Sodium</b> 160mg	<b>7%</b>
<b>Total Carbohydrate</b> 37g	<b>12%</b>
Dietary Fiber 4g	<b>16%</b>
Sugars 1g	
<b>Protein</b> 3g	
Vitamin A	10%
Vitamin C	8%
Calcium	20%
Iron	45%
* Percent Daily Values are based on a 2,000 calorie diet. Your daily value may be higher or lower depending on your calorie needs.	
	Calories: 2,000    2,500
Total Fat	Less than 65g    80g
Sat Fat	Less than 20g    25g
Cholesterol	Less than 300mg    300mg
Sodium	Less than 2,400mg    2,400mg
Total Carbohydrate	300g    375g
Dietary Fiber	25g    30g

Current FDA Label, 26% preferred

<b>Nutrition Facts</b>	
<b>8 servings per container</b>	
Serving size	2/3 cup (55g)
Amount per 2/3 cup	
<b>Calories</b>	<b>230</b>
% DV*	
<b>12%</b>	<b>Total Fat</b> 8g
<b>5%</b>	Saturated Fat 1g
	Trans Fat 0g
<b>0%</b>	<b>Cholesterol</b> 0mg
<b>7%</b>	<b>Sodium</b> 160mg
<b>12%</b>	<b>Total Carbs</b> 37g
<b>14%</b>	Dietary Fiber 4g
	Sugars 1g
	Added Sugars 0g
	<b>Protein</b> 3g
<b>10%</b>	<b>Vitamin D</b> 2mcg
<b>20%</b>	<b>Calcium</b> 260mg
<b>45%</b>	<b>Iron</b> 8mg
<b>5%</b>	<b>Potassium</b> 235mg
* Footnote on Daily Values (DV) and calories reference to be inserted here.	

Pending FDA Label, 57% preferred

*Information on Growth Hormones*

Participants were randomly allocated to one of three information groups or treatments. In the first no-info group, they were simply told, "About 90% of feedlot cattle are given added growth hormones to improve the rate of growth." And then, respondents were asked, "How concerned are you about the use of growth hormones in beef production?" The second group text-only group, written text was added to convey relative risks of hormone use. Prior to being asked level of concern, subjects were told, "About 90% of feedlot cattle are given added growth hormones to improve the rate of growth. The added hormones add about 3 extra nanograms (a billionth of a gram) to a 3 oz serving of beef. For comparison purposes, the amount of estrogen that naturally occurs in 3 oz of the following foods is: potatoes (225 nanograms), peas (340 nanograms), cabbage (2,000 nanograms), soybean oil (170,000 nanograms)." Finally, the third group visual+text group was given the same written text but was also shown a visual illustration using M&Ms allocated to different jars taken from [an online blog](#). Participants answered on a five-point scale (1 = very unconcerned; 5=very concerned;).

Information on relative risks caused a small but statistically significant reduction in the level of concern. The mean levels of concern, on the 5-point scale, were 3.93, 3.71, and 3.66 for the no-info, text-only, and text+visual information groups. Without any information on relative risks, over 71% of respondents indicated they were either concerned or very concerned. Textual information reduced that frequency to 66%, and visual+text information further reduced the percentage of concerned respondents to 63.6%.

## Concern with Added Growth Hormones in Beef Production

