



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

The Food Demand Survey (FooDS) started in May 2013 and has been on-going for one year. The following information is a summary from the past year, tracking the change in consumer demand for meat products, food expenditures, food values, and concerns.

MEAT DEMAND

Table 1: Willingness-to-Pay

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
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
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 2013	\$6.91	\$4.68	\$4.21	\$3.54	\$2.23	\$2.26	\$2.15	\$2.58
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	\$2.71	\$2.42	\$2.27	\$2.19

Willingness-to-pay (WTP) for two beef, chicken and pork products, in addition to two non-meat items, was calculated each month since the beginning of FooDS. WTP for each food item over the course of a year is shown in the table above. In Figure 1, the WTP for each product in each month is reported as an index value set relative to May 2013. For example, the WTP index for steak in April 2014 was 97.7, meaning WTP in April 2014 was $(97.7 - 100 = -2.3)$ 2.3% lower than in May 2013. WTP for chicken wings in February (which included the Super Bowl) was at its highest during the course of the year. WTP for steak and chicken breast were at their highest in September 2013.

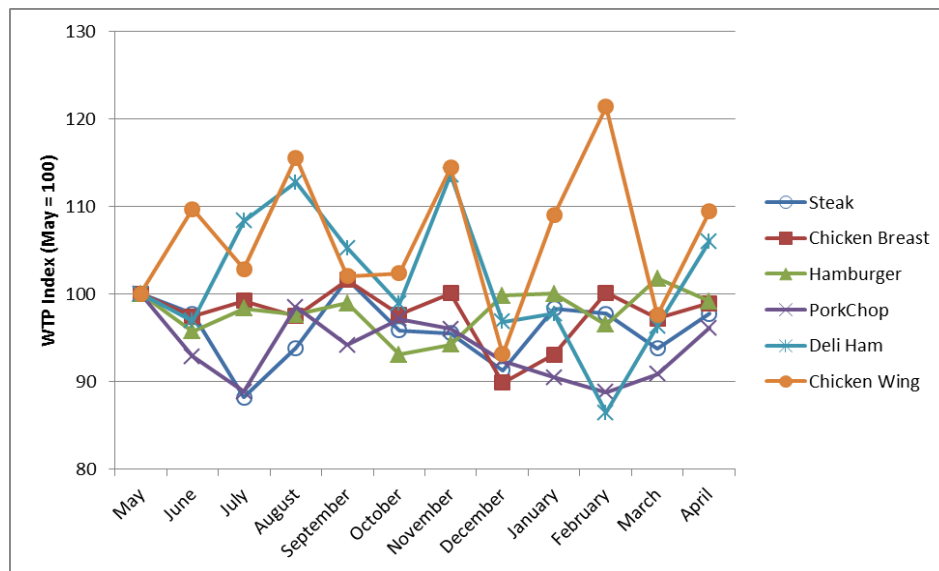


Figure 1: Demand indices for six meat products (May 2013 = 100)

FOOD EXPENDITURES

At home food-grocery expenditures reached a low of \$91.87/week in August 2013, and a high of \$96.52/week in October 2013. Consumers reported spending the least on food away from home in June 2013 at \$43.60/week and the highest in August 2013 at \$46.35/week. Consumers report continually planning to spend less money away from home throughout the course of the survey, although, as table 2 shows, they frequently do not follow through with those plans.

Table 2: Current and predicted food expenditures for at home and away from home food consumption.

	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
May 2013	\$92.37	\$45.54	-0.63%	-1.77%
June 2013	\$92.54	\$43.60	-0.60%	-2.13%
July 2013	\$92.84	\$46.06	-0.74%	-2.40%
August 2013	\$91.87	\$46.35	-0.50%	-2.08%
September 2013	\$93.33	\$45.63	-0.53%	-1.77%
October 2013	\$96.52	\$44.84	-0.85%	-1.79%
November 2013	\$94.00	\$45.31	0.25%	-2.01%
December 2013	\$91.40	\$43.95	0.21%	-1.63%
January 2013	\$92.11	\$45.54	-0.65%	-1.93%
February 2013	\$94.37	\$48.81	-0.13%	-1.32%
March 2014	\$95.32	\$48.66	-0.35%	-1.34%
April 2014	\$91.68	\$45.57	-0.16%	-1.51%

Consumers expected to see higher meat prices each month, especially for beef, although the extent of these expectations varied across months, reaching a high for beef and pork in April 2014. Consumers reported that they planned to buy more chicken in each month and less beef and pork.

Table 3: Future Consumer Expenditures. Values reported are the differences in percent of consumers agreeing and disagreeing (%) with each statement.

	I plan to buy more chicken	I plan to buy more beef	I plan to buy more pork	I plan to eat out more	I expect higher beef prices	I expect high chicken prices	I expect higher pork prices
May 2013	32.28	-0.06	-9.00	-39.71	27.14	17.07	19.28
June 2013	31.25	-9.77	-14.31	-47.93	33.72	19.97	17.56
July 2013	29.61	-8.02	-13.48	-46.76	28.14	13.68	18.23
August 2013	29.63	-11.62	-14.24	-54.73	29.10	17.43	20.41
September 2013	28.30	-7.06	-13.97	-46.08	24.31	11.35	13.31
October 2013	29.30	-6.98	-9.04	-42.34	22.23	13.33	15.69
November 2013	27.17	-6.46	-11.78	-41.88	26.44	13.27	19.63
December 2013	26.68	-1.04	-7.38	-38.92	26.24	15.10	14.28
January 2013	26.55	-5.68	-9.78	-46.91	27.28	15.60	19.19
February 2013	33.09	-2.82	-11.29	-32.65	32.29	16.09	19.65
March 2014	24.13	-7.91	-12.69	-41.26	26.99	15.53	21.71
April 2014	24.17	-7.19	-13.78	-45.88	37.06	18.64	27.14

AWARENESS & CONCERN TRACKING

Awareness and concern for 17 food issues have been tracked over the course of the survey. GMOs, Salmonella, *E. coli*, and hormones have been the top four issues consumers report hearing most about in the news. As shown in Figure 2, a significant increase in awareness was seen for Salmonella in October 2013, likely as a result of an outbreak in a California meat processor. GMOs, Salmonella, *E. coli*, and hormones were also ranked as the issues of most concern among consumers in the past year. Concern for all food issues fell in December and rose in January and February, as shown in Figure 3. In November 2013, Zilmax was added to the list of awareness and concern issues and in February 2014 was replaced with beta-agonist.

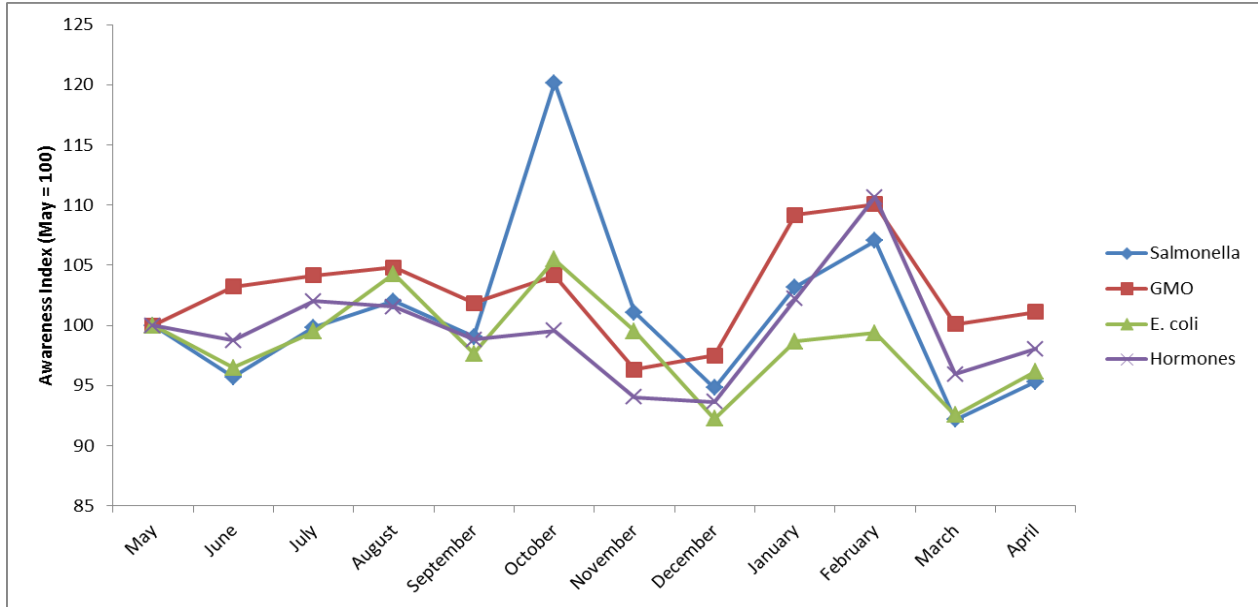


Figure 2: Awareness of four issues in the news (May 2013 = 100)

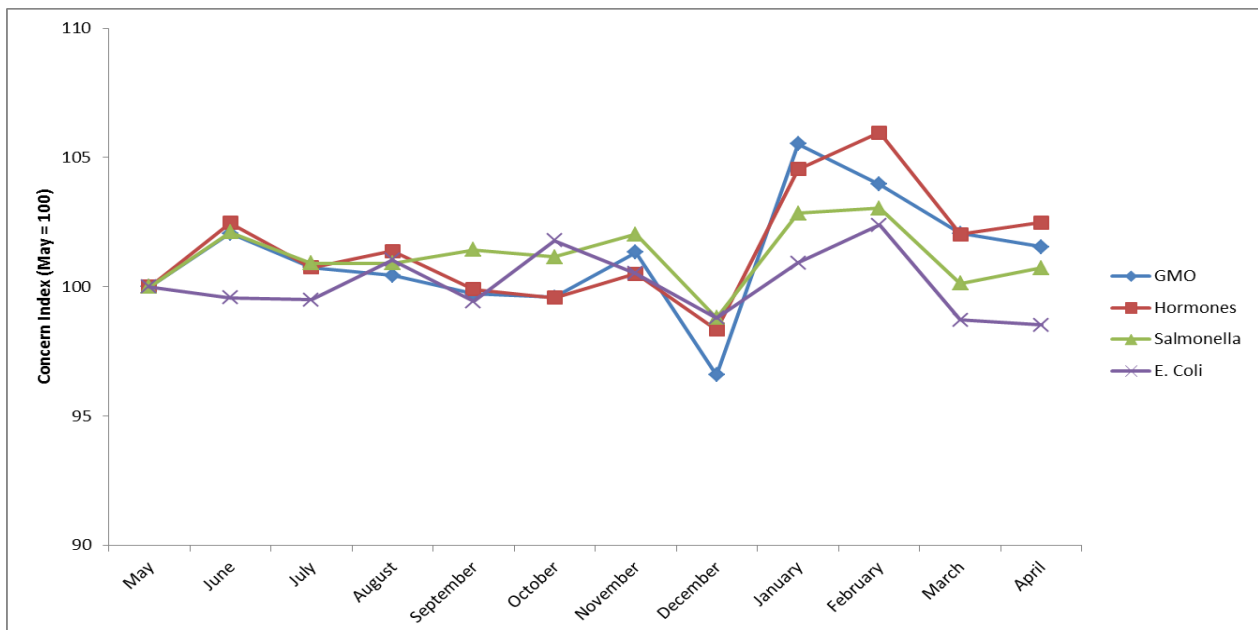


Figure 3: Concern for four issues in the news (May 2013 = 100)

Table 4: Awareness of food issues. Reported values are the mean response to the question “Overall, how much have you heard or read about each of the following topics in the past two weeks”, where 1 = nothing, 3= a moderate amount, and 5 = a great deal.

	May 2013	June 2013	July 2013	August 2013	September 2013	October 2013	November 2013	December 2013	January 2014	February 2014	March 2014	April 2014
Salmonella	2.29	2.19	2.28	2.33	2.26	2.75	2.04	2.17	2.36	2.45	2.10	2.18
E. Coli	2.26	2.18	2.25	2.36	2.21	2.39	2.25	2.09	2.23	2.34	2.10	2.18
GMO	2.16	2.23	2.25	2.26	2.20	2.25	2.08	2.10	2.36	2.38	2.16	2.18
Hormones	2.12	2.09	2.16	2.15	2.09	2.11	1.99	1.98	2.16	2.24	2.03	2.08
Farm Animal Welfare	2.03	2.02	2.09	2.07	2.03	2.07	1.93	1.96	2.06	2.22	1.93	2.00
Antibiotics	2.04	2.01	2.08	2.06	2.02	1.94	1.93	1.90	2.12	2.24	2.00	2.04
Bird Flu	2.28	2.06	2.04	2.06	1.95	2.02	1.90	1.79	1.93	2.18	1.83	1.85
Swine Flu	2.07	2.03	2.02	2.02	1.96	2.08	1.90	1.83	2.24	2.25	1.94	1.97
Mad cow	2.01	1.88	1.94	1.93	1.97	1.95	1.84	1.79	2.11	2.07	1.82	1.86
Pink Slime	1.88	1.82	1.92	1.86	1.90	1.90	1.85	1.80	1.94	2.00	1.88	1.80
Cloning	1.73	1.65	1.71	1.79	1.73	1.72	1.65	1.58	1.72	1.88	1.64	1.68
LFTB	1.78	1.79	1.82	1.82	1.77	1.78	1.70	1.64	1.76	1.89	1.76	1.73
Gestation Crates	1.59	1.54	1.57	1.53	1.59	1.56	1.48	1.44	1.61	1.62	1.55	1.52
Battery Cages	1.57	1.55	1.59	1.53	1.58	1.58	1.51	1.46	1.56	1.63	1.53	1.55
BSE	1.55	1.46	1.53	1.51	1.52	1.47	1.41	1.37	1.51	1.55	1.49	1.44
Greenhouse Gas	1.82	1.87	1.88	1.83	1.83	1.81	1.75	1.74	1.82	1.93	1.79	1.79
Zilmax	-	-	-	-	-	-	1.38	1.34	1.47	-	-	-
Beta-Agonist	-	-	-	-	-	-	-	-	-	1.54	1.44	1.45

Table 5: Concern of food issues. Reported values are the mean response to the question “How concerned are you that the following pose a health hazard in the food that you eat in the next two weeks”, where 1 = very unconcerned, 3= neither concerned nor unconcerned, and 5 = very concerned.

	May 2013	June 2013	July 2013	August 2013	September 2013	October 2013	November 2013	December 2013	January 2014	February 2014	March 2014	April 2014
Salmonella	3.40	3.47	3.43	3.43	3.45	3.44	3.47	3.36	3.50	3.51	3.41	3.42
E. Coli	3.45	3.43	3.43	3.49	3.43	3.51	3.48	3.41	3.48	3.53	3.40	3.40
Hormones	3.24	3.32	3.27	3.29	3.24	3.23	3.26	3.19	3.39	3.44	3.31	3.32
Antibiotics	3.21	3.32	3.27	3.26	3.23	3.18	3.21	3.15	3.34	3.36	3.28	3.34
Farm Animal Welfare	3.22	3.29	3.24	3.23	3.17	3.20	3.20	3.13	3.34	3.35	3.26	2.67
GMO	3.19	3.26	3.22	3.21	3.18	3.18	3.23	3.08	3.37	3.32	3.26	3.24
Pink Slime	3.07	3.15	3.14	3.06	3.08	3.04	3.10	2.98	3.13	3.23	3.07	3.15
Swine Flu	3.12	3.13	3.05	3.11	3.05	3.03	3.08	3.01	3.15	3.20	3.04	3.11
Cloning	3.02	3.09	3.02	3.02	3.03	3.02	3.07	3.02	3.26	3.32	3.02	3.05
Bird Flu	3.16	3.14	3.08	3.07	3.01	2.99	3.07	2.93	3.10	3.14	3.00	3.09
Mad Cow	3.11	3.12	3.05	3.06	3.09	2.97	3.10	2.98	3.17	3.29	3.00	3.04
Gestation Crates	2.91	2.98	2.90	2.89	2.85	2.88	2.89	2.80	2.94	3.02	2.89	2.98
Battery Cages	2.88	2.97	2.93	2.82	2.84	2.87	2.92	2.77	2.98	2.98	2.87	2.93
Greenhouse Gas	2.88	2.96	2.88	2.83	2.86	2.83	2.90	2.77	2.96	3.03	2.83	2.89
BSE	2.88	2.88	2.85	2.85	2.79	2.80	2.85	2.77	3.00	3.02	2.82	2.90
Lean Fine Textured Ground Beef	2.92	2.95	2.90	2.83	2.81	2.80	2.93	2.78	2.91	3.00	2.81	2.89
Zilmax	-	-	-	-	-	-	2.83	2.75	2.87	-	-	-
Beta-agonist	-	-	-	-	-	-	-	-	-	2.95	2.81	2.91

GENERAL FOOD VALUES

Taste, safety, price, and nutrition have remained consumer's top four values throughout the course of the FoodS survey, while novelty has remained the value of least concern. Consumers reported that finding affordable foods to fit with-in their budget was their main challenge each month. Consumers reported that finding foods their children will eat was their least difficult challenge each month. The challenge of losing weight saw the largest increase in December.

Table 6: Consumer Values. Respondents were asked to choose their four "most important" and four "least important" food-related values. A scale of importance was created by calculating the proportion of times a food value appeared most important minus the times it appeared least important. A higher number implies a greater importance to the consumer.

	Taste	Safety	Price	Nutrition	Appearance	Animal Welfare	Natural-ness	Origin	Environment	Convenience	Fairness	Novelty
May 2013	0.62	0.57	0.51	0.44	0.02	-0.18	-0.18	-0.25	-0.32	-0.23	-0.32	-0.68
June 2013	0.62	0.60	0.46	0.43	0.06	-0.17	-0.19	-0.27	-0.30	-0.26	-0.35	-0.64
July 2013	0.64	0.56	0.53	0.49	0.05	-0.11	-0.24	-0.31	-0.29	-0.30	-0.33	-0.69
August 2013	0.68	0.60	0.49	0.49	0.03	-0.20	-0.23	-0.32	-0.30	-0.22	-0.34	-0.69
September 2013	0.67	0.59	0.49	0.43	0.04	-0.19	-0.20	-0.27	-0.32	-0.23	-0.35	-0.66
October 2013	0.67	0.56	0.51	0.48	0.05	-0.19	-0.19	-0.31	-0.34	-0.28	-0.31	-0.66
November 2013	0.66	0.64	0.53	0.41	0.05	-0.20	-0.18	-0.33	-0.29	-0.21	-0.34	-0.71
December 2013	0.64	0.61	0.53	0.38	0.04	-0.17	-0.16	-0.27	-0.28	-0.28	-0.31	-0.72
January 2013	0.66	0.54	0.51	0.44	0.00	-0.10	-0.17	-0.25	-0.34	-0.31	-0.32	-0.66
February 2013	0.62	0.57	0.46	0.47	0.01	-0.16	-0.16	-0.32	-0.23	-0.28	-0.32	-0.66
March 2014	0.70	0.60	0.49	0.44	-0.04	-0.08	-0.15	-0.33	-0.27	-0.32	-0.31	-0.72
April 2014	0.64	0.62	0.47	0.42	0.04	-0.13	-0.14	-0.30	-0.30	-0.31	-0.34	-0.67

Table 7: Consumer Challenges. Food-related challenges were ranked on a scaled from 1 – 7, where 7 = most challenging and 1 = least challenging; reported values are the mean ranks.

	Finding affordable foods	Avoiding certain nutrients or ingredients	Avoiding pesticides, added hormones, antibiotics	Losing weight	Finding convenient alternatives	Finding time to cook at home	Finding foods my children will eat
May 2013	5.07	4.38	4.15	3.97	3.97	3.67	2.77
June 2013	5.12	4.25	4.03	4.15	3.98	3.72	2.75
July 2013	5.15	4.36	4.04	3.94	3.95	3.87	2.70
August 2013	5.18	4.05	3.93	4.07	4.11	3.89	2.77
September 2013	5.14	4.11	3.94	4.02	4.29	3.89	2.64
October 2013	5.13	4.26	4.21	3.84	3.93	3.89	2.74
November 2013	5.01	4.23	4.08	3.83	4.11	3.99	2.77
December 2013	4.99	4.22	3.94	4.08	4.03	3.98	2.75
January 2013	5.21	4.19	4.14	3.87	4.10	3.84	2.65
February 2013	4.95	4.41	4.17	3.93	3.92	3.76	2.85
March 2014	5.00	4.40	4.19	4.05	3.96	3.80	2.59
April 2014	5.12	4.35	4.13	4.06	4.00	3.72	2.65

OTHER CONSUMER CHARACTERISTICS

Each month, the percent of respondents who reported being on food stamps, being vegetarian or vegans, or have had food poisoning in the last month was calculated, and is reported in figure 4. June 2013 had the highest frequency of food-stamp participants. October 2013 saw the largest percent of people who reported being vegetarian or vegan at 5.66%. Reported food poisoning was highest in June 2013 at 5.01%.

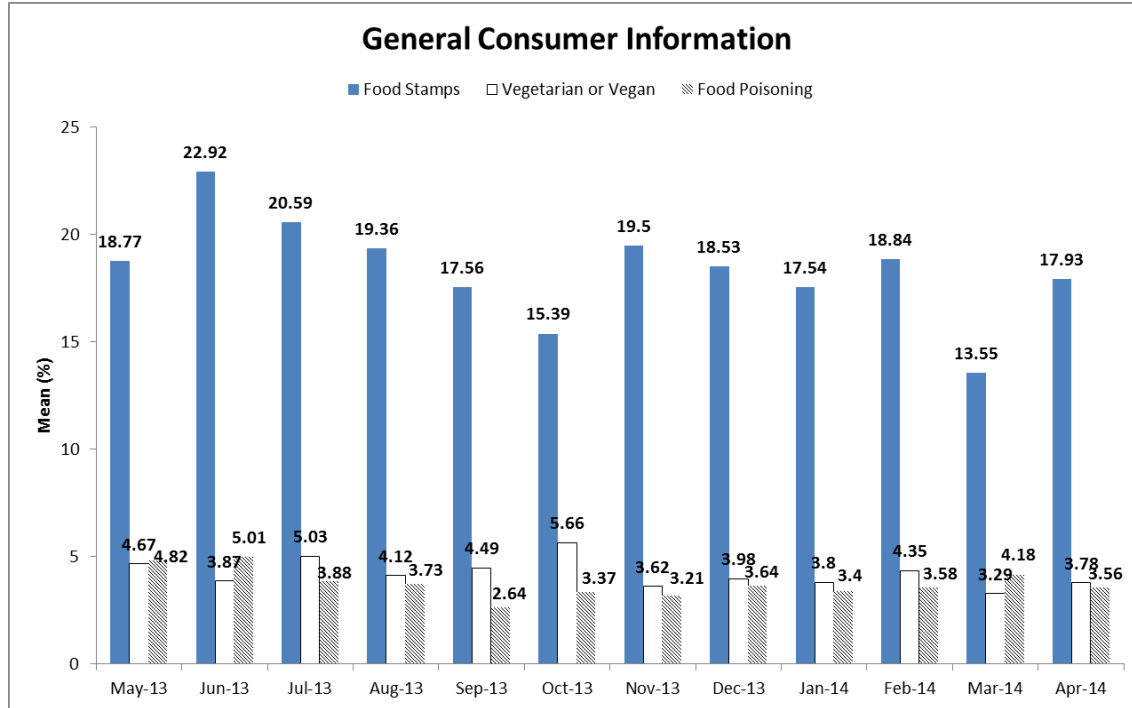


Figure 4: General consumer information covering food stamps, vegetarian or vegan preferences, or food poisoning. Calculated as a mean of the population (%)

AD HOC QUESTIONS

Each month three to five ad hoc questions were added to the survey. The following is a list of questions and topics that were covered.

- Beliefs about naturalness of food ingredients
- The definition of naturalness
- Preferences for food label requirements
- Preferences for labeling of foods containing GMOs
- Awareness of Zilmax
- A time when trust was lost in the food system
- Preferences for the Supplemental Nutrition Assistance Program (SNAP) or the “food stamp” program
- Preference for the US government subsidizing farmers
- Knowledge of USDA meat quality grades
- Awareness of lean finely textured ground beef or “pink slime”
- Desirability of lean finely textured ground beef
- Trust in information from meat and livestock sources
- Percentage of US cattle given added hormones
- Food related goals for the new year
- Knowledge of meat and livestock sources
- Price estimates for ground beef, chicken breast, and pork chops
- Consumer confidence in price estimates
- Number of unique grocery stores visited
- Use of loyalty cards
- Preference for FDA nutrition facts panel
- Concern for added growth hormones