

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

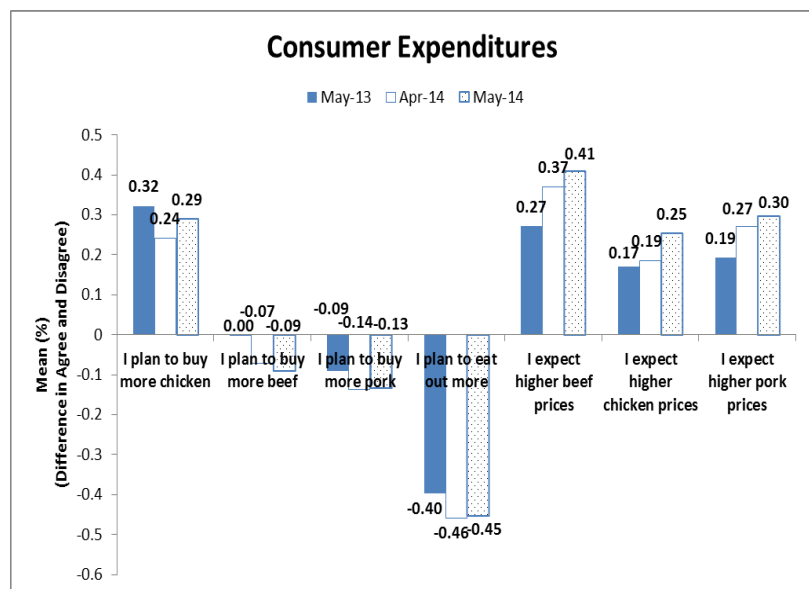
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
Last Year: May 2013	\$7.03	\$5.03	\$4.21	\$3.91	\$2.28	\$2.07	\$1.92	\$1.86
Last Month: April 2014	\$6.87	\$4.98	\$4.17	\$3.76	\$2.42	\$2.27	\$2.19	\$2.71
May 2014	\$6.35	\$4.63	\$4.07	\$3.51	\$2.29	\$2.01	\$2.08	\$2.69
% change (April - May)	-7.58%	-7.56%	-2.40%	-6.65%	-5.37%	-11.45%	-5.02%	-0.74%

Willingness-to-pay (WTP) decreased this month for all food products. Percentage reductions were highest for steak, chicken breast, and chicken wing. WTPs for all meat products (except deli ham) were also lower than one year ago.

FOOD EXPENDITURES

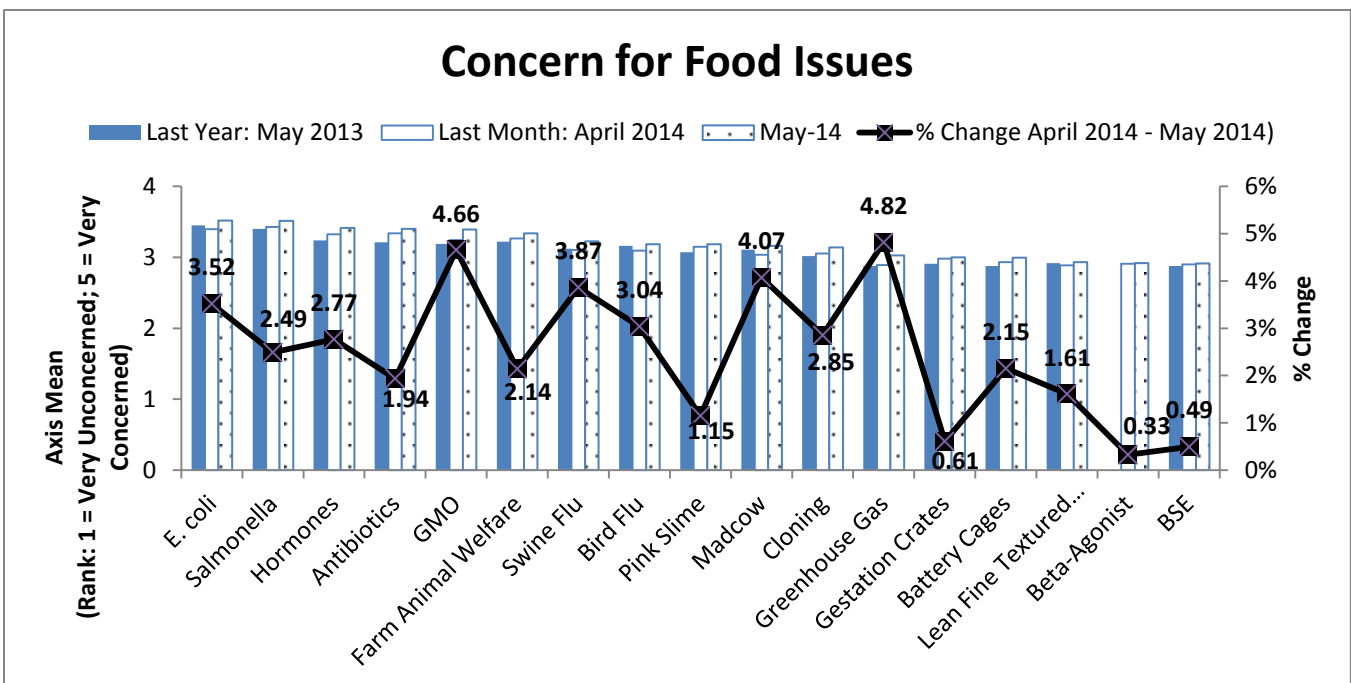
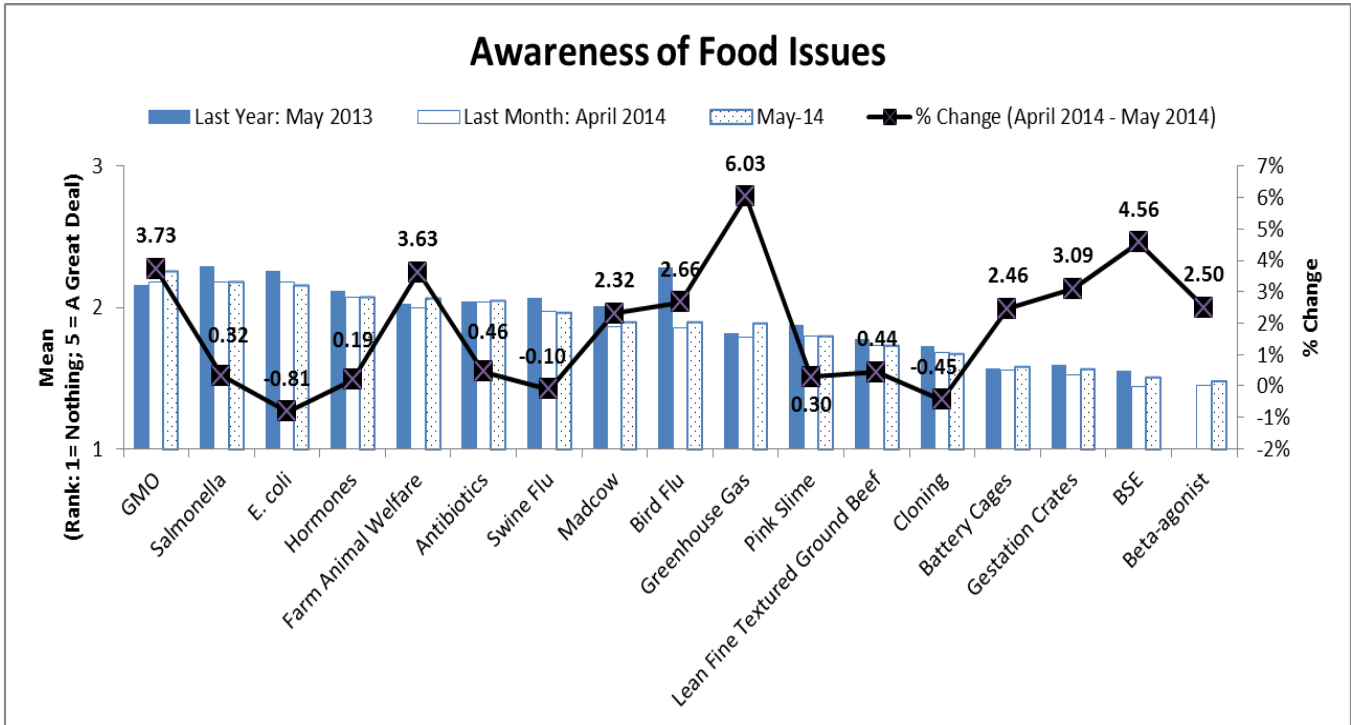
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
May 2013	\$92.37	\$45.54	-0.63%	-1.77%
April 2014	\$91.68	\$45.57	-0.16%	-1.51%
May 2014	\$96.34	\$50.15	-0.55%	-1.81%
% change (April - May)	5.08%	10.05%		

This month, food-grocery expenditures are \$96.34, up 5.08% from April, while \$50.15 is spent on food consumed away from home, up 10.05% from April. Consumers anticipate spending less money on food in coming months. Consumers expect to see higher meat prices in comparison to one year ago and compared to last month. Consumers expect to buy more chicken and less beef and pork in the coming weeks.



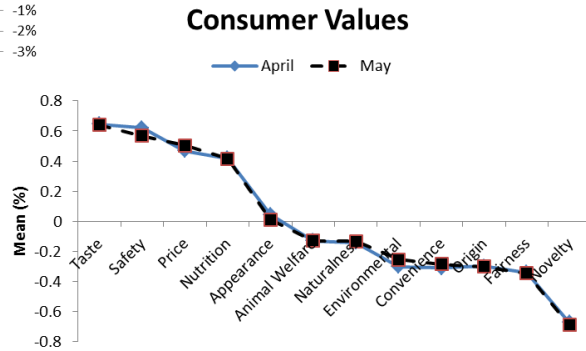
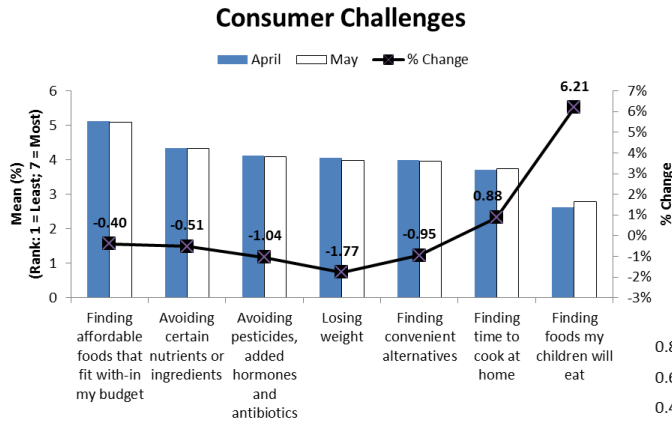
AWARENESS & CONCERN TRACKING

GMO, Salmonella, and E. coli were reported as most visible in the news over the past two weeks. The largest jump in awareness was for Greenhouse Gas and BSE. The greenhouse gas effect is likely a result of a widely publicized release of a report on climate change by the White House on May 6. E. coli, Salmonella, and hormones were participant's top three concerns during May. Concern for all issues increased in May. Concern for greenhouse gasses and GMOs had the greatest percentage increases from last month.



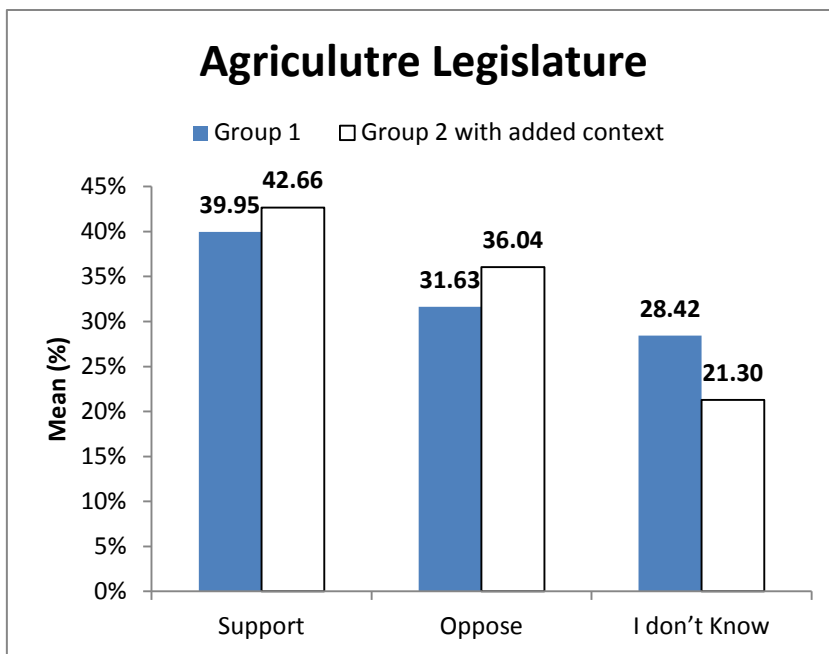
GENERAL FOOD VALUES

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, safety and environment and an increase in perceived value price. Consumer challenges remained similar to previous months with a slight increase in the least-challenging issue: findings foods children would eat. In May, 3.35% of participants reported having food poisoning, a 5.9% decrease from April.



AD HOC QUESTIONS

Four new ad hoc questions were added to the survey in May.

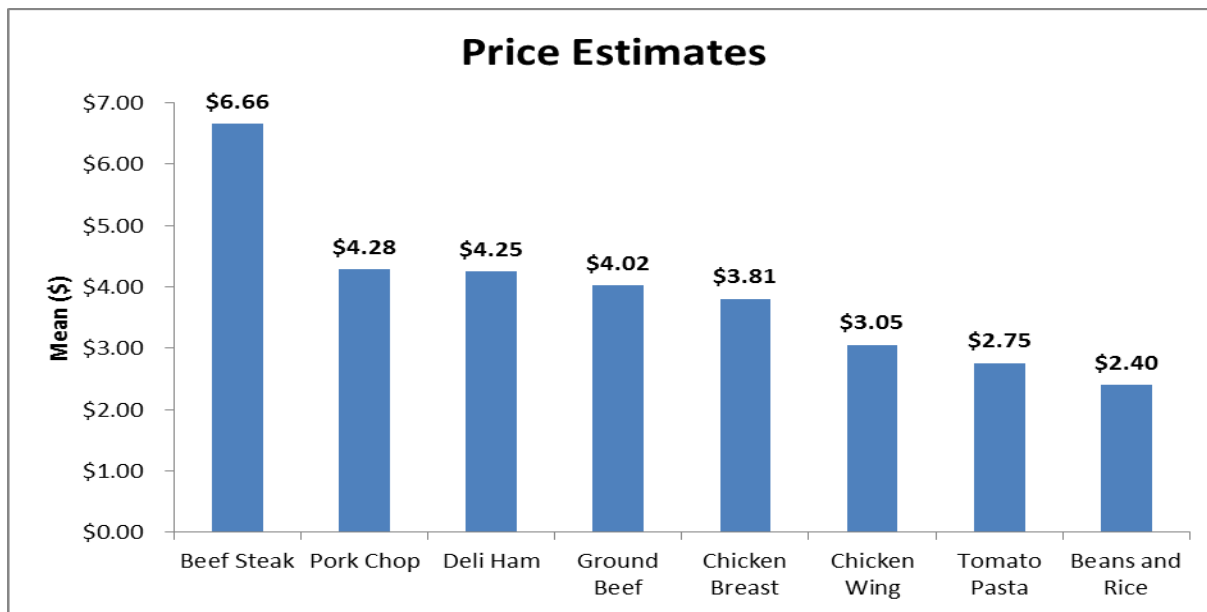


The first question pertains to support or opposition so-called “ag gag” laws. One half the participants were asked the following, “Several state legislatures have considered bills to outlaw certain activities on livestock facilities. The laws would prohibit a person entering an animal or research facility to take pictures by photograph, video camera, or other means with the intent to commit criminal activities or defame the facility or its owner. The laws would also charge a person with a crime if he or she willfully obtains access to an agricultural production facility by false pretenses or knowingly makes a false statement or misrepresentation as part of an application for employment at an agricultural production facility with the intent to

commit an act not authorized by the owner. Would you support or oppose such legislation?” The other half received the same statement but the first sentence was altered to add context as follows: “In response to the release of undercover videos revealing cases of animal cruelty by animal activist organizations, agricultural groups have lobbied legislatures in several states to introduce bills to outlaw certain activities on livestock facilities.”

Regardless of which group a participant was randomly assigned, more people supported than opposed such laws. Unexpectedly, adding contextual information increased the level of support for the laws but it also increased opposition as well, and by a larger amount 21% to 28% were neither in support or opposition in groups 1 and 2.

Participants were also asked: “What is your best estimate of the average price that grocery stores, supermarkets, and wholesale stores charge for the following products in your area?” Consumers estimated beef steak to have an average price of \$6.66 per pound, ground beef at \$4.02 per pound, and chicken wings to be \$3.05 per pound.



Next, participants were asked: “On a scale from 0 to 100, where 0 indicates absolute uncertainty and 100 indicates absolute certainty, how confident are you in your previous price estimates for the following products?”

Consumers were most confident in their price estimates for chicken breast and were least confident in their price estimates for pork chops. Consumers were most confident in their estimates of chicken breast prices and least confident in pork chop prices.

Consumer Confidence in Price Estimates

