

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

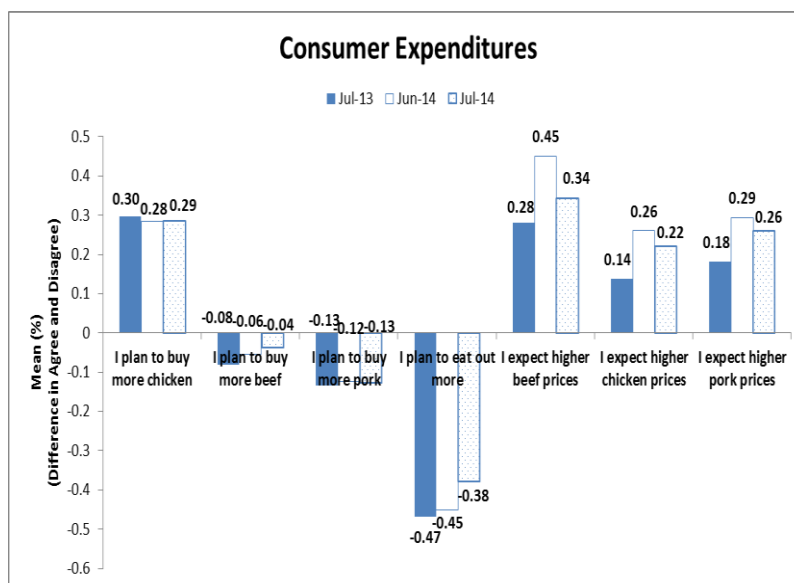
Willingness-to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
Last Year: July 2013	\$6.20	\$4.98	\$4.14	\$3.47	\$2.47	\$2.13	\$2.30	\$3.17
Last Month: June 2014	\$7.52	\$5.35	\$4.50	\$4.14	\$2.89	\$2.73	\$2.62	\$3.82
July 2014	\$7.00	\$5.00	\$4.30	\$3.71	\$2.48	\$2.18	\$1.80	\$2.98
% change (June - July)	-6.91%	-6.54%	-4.44%	-10.39%	-14.19%	-20.15%	-31.30%	-21.99%

Willingness-to-pay (WTP) for all food products decreased compared to one month ago; however WTP for all meat products remains higher relative to the same time last year.

FOOD EXPENDITURES

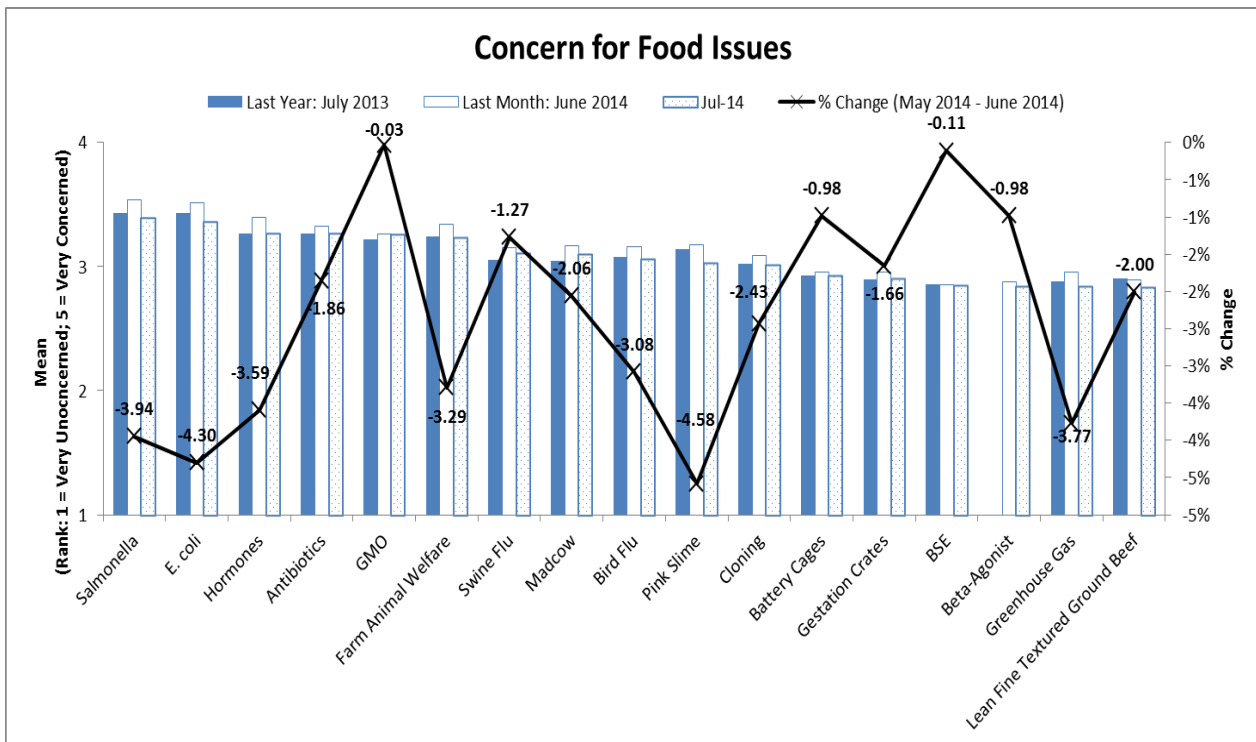
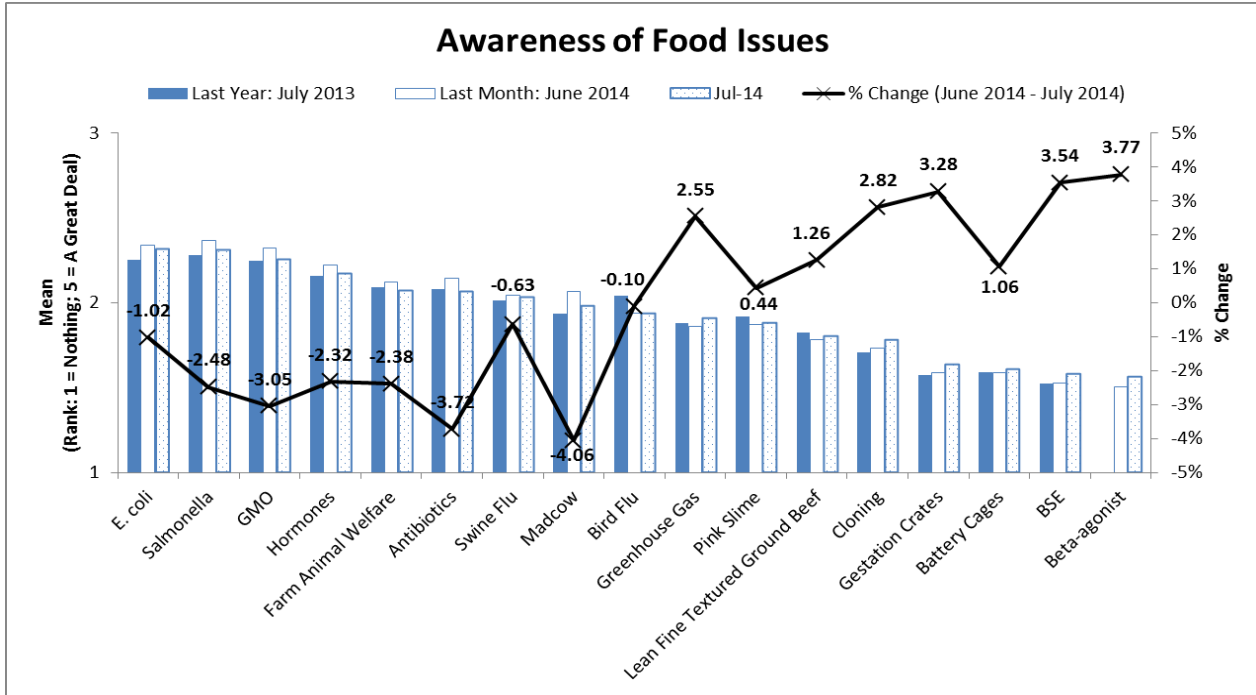
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
July 2013	\$92.84	\$46.06	-0.74%	-2.40%
June 2014	\$94.84	\$46.89	-0.16%	-1.63%
July 2014	\$94.08	\$49.61	-0.37%	-1.48%
% change (June - July)	-0.80%	5.80%		

In July, food-grocery expenditures were \$94.08, down 0.80% from June, while \$49.61 was spent on food consumed away from home, up 5.8% from June. While consumers continue to expect to see higher meat prices in the coming weeks, there is reduction in inflationary expectations in comparison to last month, particularly for beef. Expected buying patterns remain similar to last month and last year, with a slight improvement in planned beef buying.



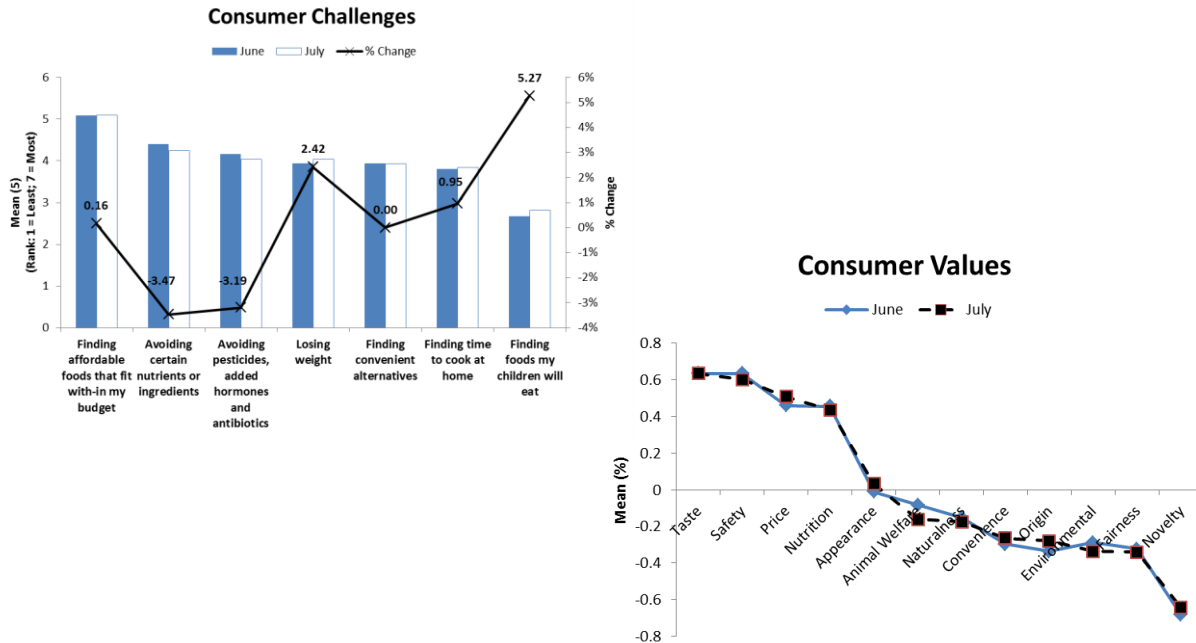
AWARENESS & CONCERN TRACKING

E. coli, Salmonella, and GMO were reported as most visible issues in the news over the past two weeks. The largest percentage jump in awareness from June to July was for beta-agonists and BSE. The largest percentage fall from June to July was for mad cow disease. Salmonella, *E. coli*, and hormones were again participant's top three concerns during July. Concern for all issues decreased in July with *E. coli*, Salmonella, and pink slime exhibiting the greatest percent decreases in concern.



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 safety, animal welfare, and environment and a slight increase in perceived value of price and appearance. Similar to previous months, consumers reported that their main challenge was finding affordable foods that fit with-in their budget. Similar to previous months, finding time to cook at home and finding food children will eat were ranked last. In July, 4.49% of participants reported having food poisoning, a 14.83% increase from June.



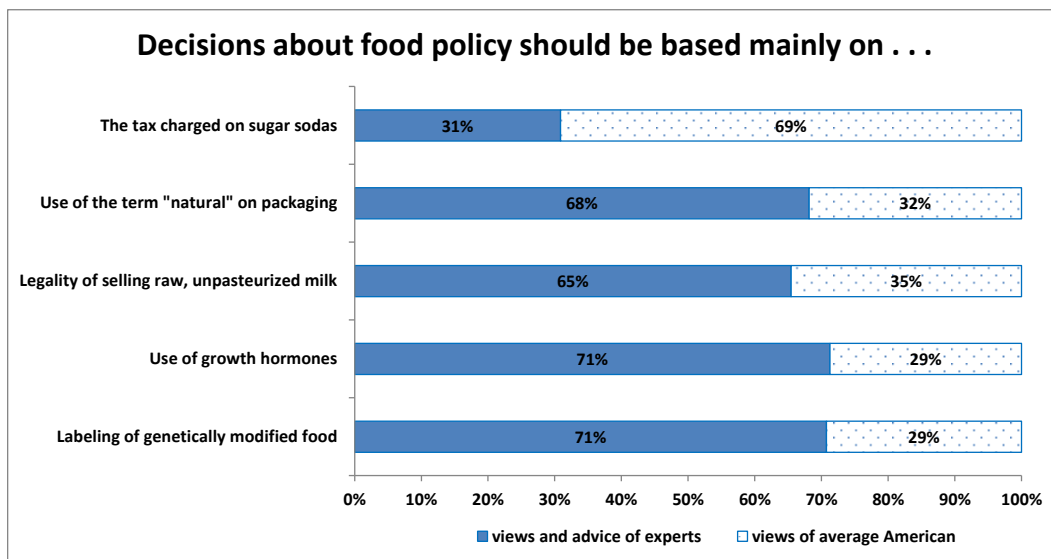
AD HOC QUESTIONS

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

The first two questions were based on some [prior research](#) published in *Science* that categorized citizens in terms of their attitudes about how technology should be governed. We applied these questions to five food policy issues and allowed respondents to have different answers for different issues.

The first question asked: “Decisions about food policy should be based mainly on the views and advice of experts OR decisions about food policy should be based mainly on the views of the average American. For each of the following, which of those two positions is closest to your own?” The second question asked: “Decisions about food policy should be based mainly on the moral and ethical issues involved OR decisions about food policy should be based mainly on the scientific evidence of risk and benefit. Which of those two positions is closest to your own?”

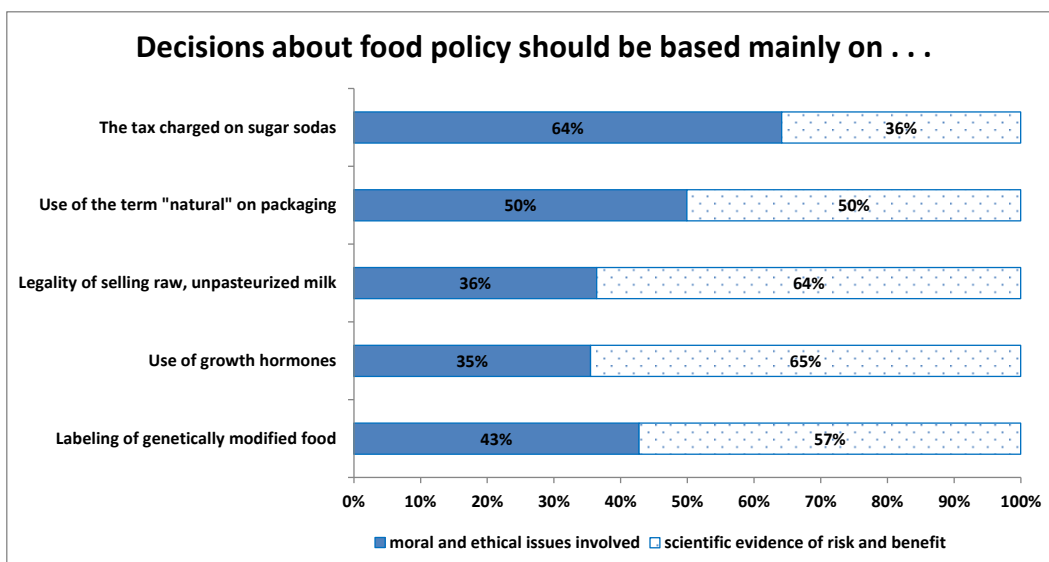
As with the prior research, we categorized people as follows: “scientific elitists” wanted policy decisions made by experts on the basis of scientific evidence, “moral elitists” wanted policy decisions based made by experts on the basis of moral issues, “scientific populists” wanted the average American to make decisions on the basis of scientific evidence, and “moral populists” wanted the average American to make decisions on the basis of moral issues.



More than two-thirds of respondents wanted policy decisions related to use of growth hormones and GMO labeling to be based on expert advice. In stark contrast, almost 70% wanted

decisions about soda taxes to be based on views of the average American.

For three issues, milk pasteurization, hormones, and GMO labeling, the majority thought decisions should be based on science. There was a split on natural labeling. For soda taxes, the majority thought moral issues should be determinative.



For four issues, “scientific elitists” were the majority type, but “moral populism” was the majority paradigm for soda taxes.

Issue	moral elitists	scientific elitists	moral populists	scientific populists
Labeling of genetically modified food	27%	43%	15%	14%
Use of growth hormones	23%	48%	12%	16%
Legality of selling raw, unpasteurized milk	21%	44%	15%	19%
Use of the term "natural" on packaging	32%	36%	18%	14%
The tax charged on sugar sodas	18%	13%	46%	23%

The following table provides a sense for how demographics differ by the consumer type for the issue of labeling on genetically modified food. “Scientific elitists” were the least concerned about GMOs and tended to be the most educated. A larger fraction of “moral elitists” were Democrats than was the case for the other consumer types.

Characteristic	moral elitists	scientific elitists	moral populists	scientific populists
GMO concern (1 to 5)	3.41	3.06	3.34	3.43
% female	51%	51%	47%	58%
% worked on a farm	20%	13%	25%	20%
% college degree	26%	32%	21%	28%
Conservative (1 to 5)	2.92	3.07	2.88	3.05
% Democrat	44%	39%	35%	35%
% Republican	23%	24%	18%	17%

Lastly, consumers were asked an open-ended question: "In 1945, it took about 10 gallons of water and 50 lbs of feed to produce a gallon of milk. Today, it only takes about 2 gallons of water and 10 lbs of feed to produce a gallon of milk. Each dairy cow today produces about 200% more milk compared to one in 1960. How do you think this change happened?"

A keyword search was conducted among the open-ended responses. Below is a count of the occurrences of different key words among responses. Some of the main keywords mentioned were: hormones (69), growth hormones (41), feed (28), technology (25), and selective breeding (20).

Hormones

Keyword	Mentions
Hormones	69
Growth hormones	42
Use of hormones	13
Hormone injections	7
Genetically modified hormones	3

Feed Options

Keywords	Mentions
Feed	30
Chemicals in feed	14
GMO	12
Genetically Modified Food	6
Fed	5
High-Tech Feed	4
Food	4
Additives	3

Science

Keyword	Mentions
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Technology	26
Science	20
Research	9
Scientific Advances	4
Scientific Experimentation	1
Scientific Study	1

Breeding and Genetics

Keywords	Mentions
Selective Breeding	20
Breeding	14
Genetics	11
Genetic Engineering	7
Cloning	5
Hybrids	3
Genetic Research	1

Drugs and Steroids

Keywords	Mentions
Steroids	14
Steroid Hormones	7
Drugs	6
Chemicals	3

Farming Techniques

Keywords	Mentions
Efficient	16
Techniques	4
Machines	4
Produce	2
Farming Methods	1

Economics

Keywords	Mentions
Money	3
Economics	1
Economy	1
Economizing	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. Hormones
 - a. 134 responses
 - b. Examples responses
 - i. "hormones that cause the cows to create more milk."
 - ii. "Hormones given to present day cows develop more milk that those without hormones."
 - iii. "Partly in sort of the same way that canis lupus became canis familiaris. Controlled breeding of high-producing cows. Hormone injections might help as well.
 - iv. "Probably from the cows getting growth hormones, bigger cows equal more milk"
2. Feed Choices
 - a. 78 responses
 - b. Example responses
 - i. "I would say it is probably something in the feed that contains some kind of nutrients that the cows are getting and they don't need more than that. That does not mean it is good, it means I would need additional information to come to a conclusion."
 - ii. "Better feed and environmental management."
 - iii. "BETTER FOOD AND BETTER MILKING DEVICES. FARMERS DONT MILK WITH HANDS ANYMORE THEY USE MACHINES AND THEY HAVE "BETTER" FOOD."
 - iv. "Dairy farmers are feeding their cows feed which is enhanced with vitamins, minerals, steroids, and other things to make them produce more milk with less feed and water."
3. Science
 - a. 61 responses
 - b. Example responses
 - i. "learned efficiencies and scientific advances"
 - ii. "scientific and technological advances in animal husbandry but also the (ugly) rise of the CAFO"
 - iii. "Scientific research"
 - iv. "More science and research has been given on the subject to see how we could improve our procedures."
 - v. "some type or types of genetic engineering have occurred"
 - vi. "I think through cloning and the amount of water and food given"
4. Breeding and Genetics
 - a. 61 responses
 - b. Example responses
 - i. "breeding cows that give more milk, keeping them healthier and better understanding of the food needs of a milk cow"
 - ii. "By the selective breeding of dairy cows."
 - iii. "A combination of genetic manipulation, advances in science and hybrid breeding of both crops and livestock"
 - iv. "I think through cloning and the amount of water and food given"
5. Drugs and Steroids
 - a. 30 responses
 - b. Example responses
 - i. "the feed must have steroids or enhanced ingrendiants to make that much difference"
 - ii. "the change in diet and exersize and drugs"
 - iii. "the feed is full of chemicals"
 - iv. "Hormones, steroids, better (within the context of providing sustenance) feeding, better collection."

6. Farming Techniques
 - a. 27 responses
 - b. Example responses
 - i. "more efficient techniques and better equipment"
 - ii. "The evolution of science and the techniques used."
 - iii. "They are milked continuously by machines and the livestock is fed hormones that make them produce more milk"
 - iv. "automatic milking machines that pump a lot of milk"
7. Economics
 - a. 6 responses
 - b. Example responses
 - i. "economizing, better equipment to produce"
 - ii. "They use meds of some sort and now our milk is shit because it's all about making money."
 - iii. "THE ECONOMY HAS GROWN AND LESS COWS, MORE SICK SO MORE COWS HAVE TO BE MILKED"
8. Interesting or curious responses
 - a. "abuse and overworking of cows"
 - b. "Because we rely too much on animal products when we should not touch animal products. Government and companies have a vested interest in keeping prices of food high and not making plentiful food available, which would happen if everyone became vegetarian. Scientific improvements lead to poisoning."
 - c. "Use of gasoline"