

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

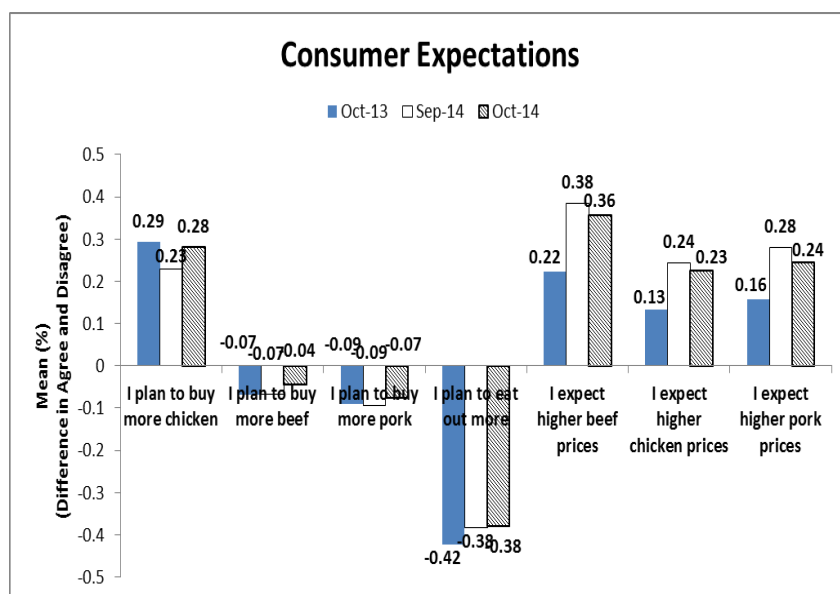
Willingness- to-Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
Last Year: October 2013	\$6.74	\$4.91	\$3.92	\$3.80	\$2.26	\$2.12	\$2.18	\$3.22
Last Month: September 2014	\$7.18	\$5.06	\$4.48	\$4.01	\$2.44	\$2.10	\$1.90	\$3.45
October 2014	\$7.05	\$4.88	\$4.25	\$3.69	\$2.37	\$2.21	\$2.11	\$2.85
% change (Sept. – Oct.)	-1.81%	-3.56%	-5.13%	7.98%	-2.87%	5.24%	11.05%	-17.39%

Willingness-to-pay (WTP) for steak, chicken breast, hamburger, and deli ham decreased from one month ago, whereas pork chop WTP saw an almost 8% increase. WTP for all meat products, except chicken breast and pork chops, are higher than the same time last year.

FOOD EXPENDITURES

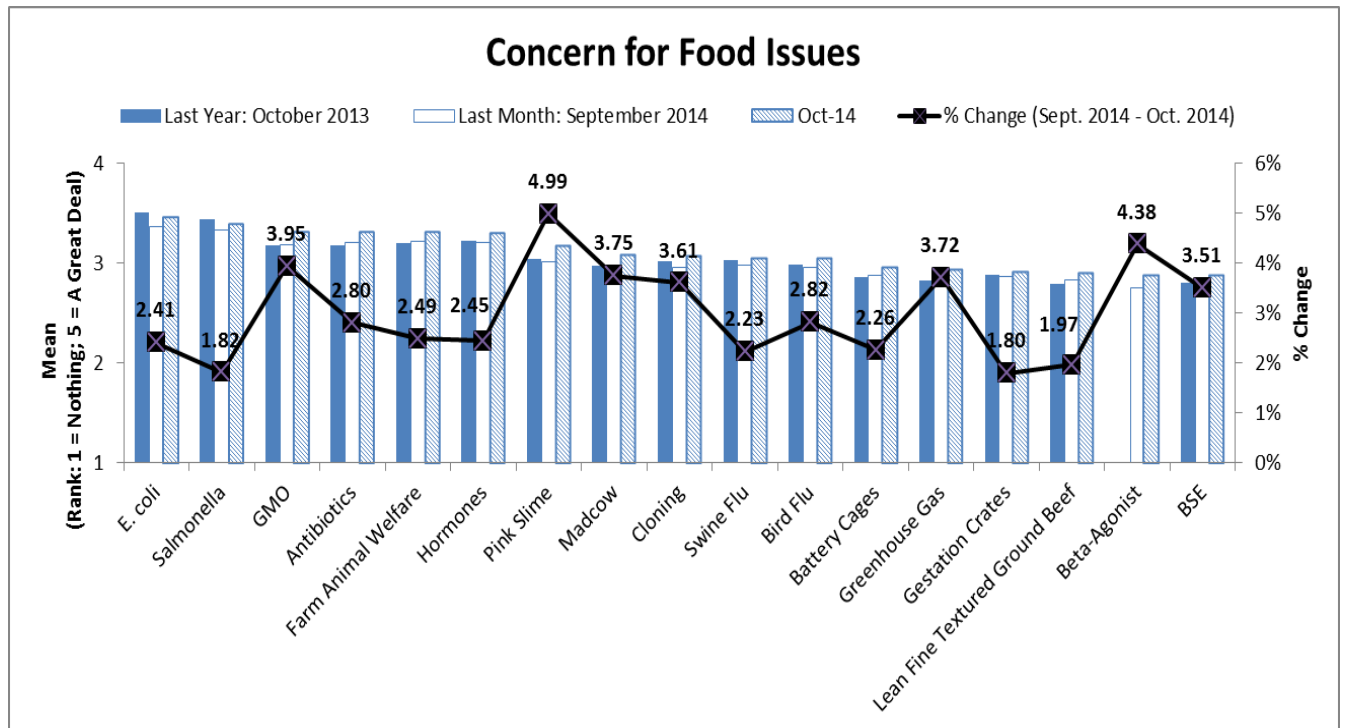
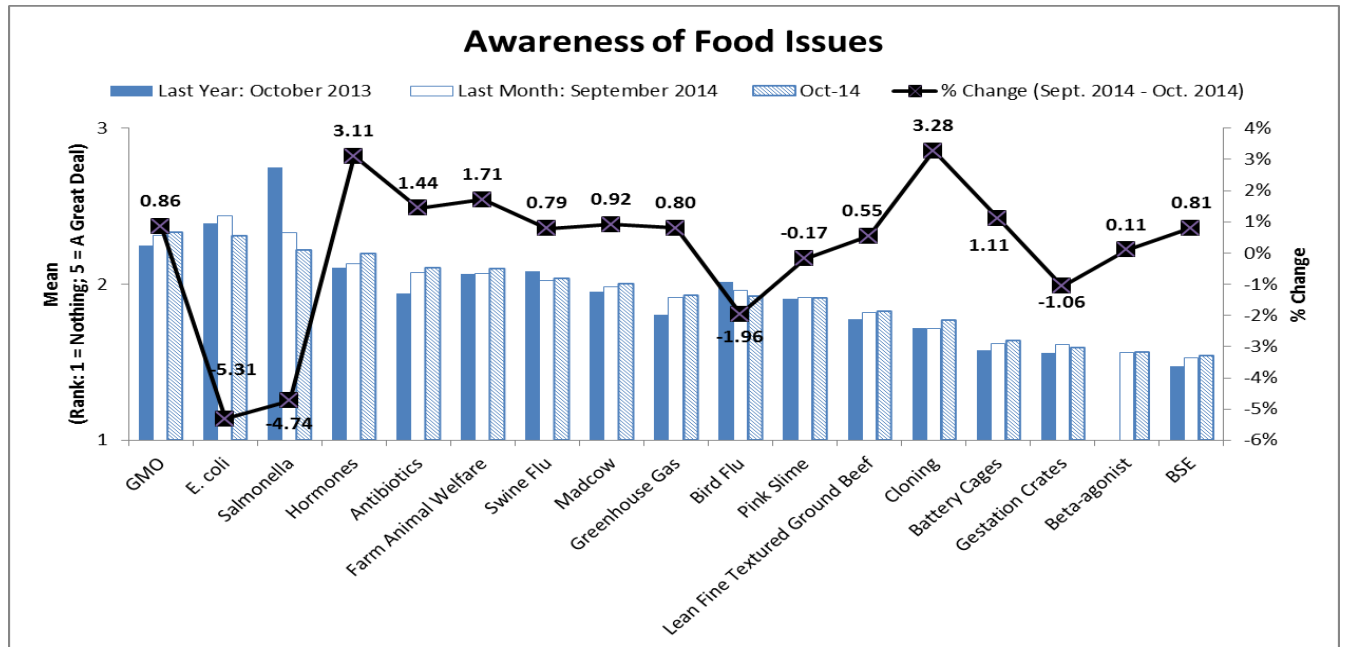
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
October 2013	\$96.52	\$44.84	-0.85%	-1.79%
September 2014	\$92.96	\$50.30	-0.33%	-1.70%
October 2014	\$93.27	\$48.12	-0.44%	-1.64%
% change (Sept. – Oct.)	0.33%	-4.33%		

In October, food-grocery expenditures were \$93.27, up slightly from September, while \$48.12 was spent on food consumed away from home, down 4.33% from September. While consumers continue to expect higher meat prices, inflationary expectations are less than last month, though higher than a year ago. Expected purchases for all meat products rose in October relative to September, with the largest uptick in planned purchases for chicken.



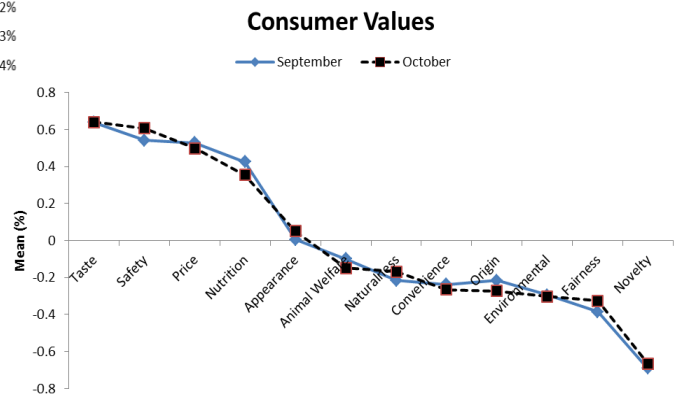
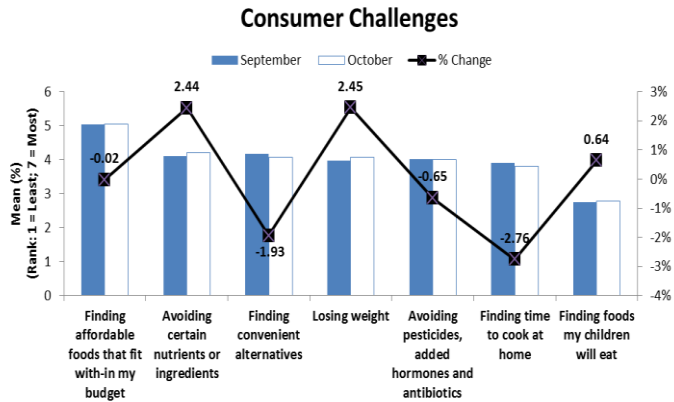
AWARENESS & CONCERN TRACKING

GMO, *E. coli*, and *Salmonella* remained as the most visible issues in the news over the past two weeks. The largest percentage jump in awareness from September to October was for cloning and hormones. The largest percentage fall from September to October was for *Salmonella*. *E. coli*, *Salmonella*, and GMO were ranked the top three concerns during October. Concern increased for all issues from September to October. The largest percent increase over last month was for pink slime.

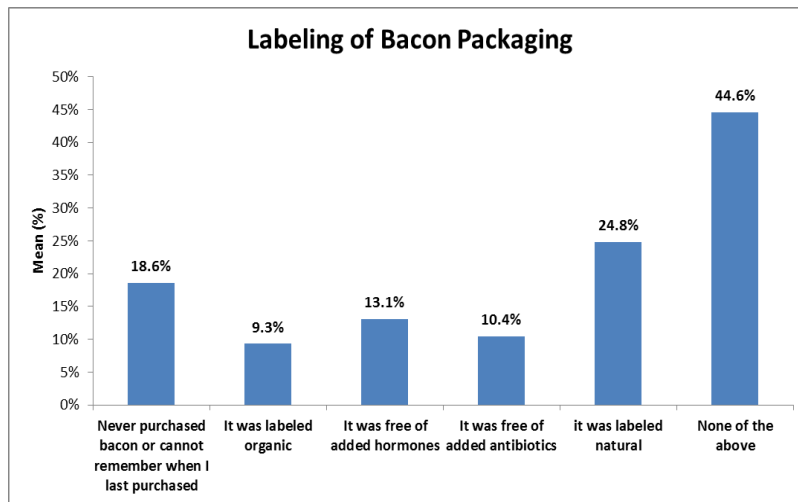


GENERAL FOOD VALUES

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 importance of price, nutrition, animal welfare and origin, and a slight increase in perceived importance of safety, appearance, and naturalness. Similar to previous months, consumers reported that their main challenge was finding affordable foods that fit with-in their budget. Finding time to cook at home and finding food children will eat remained last, as in previous months. In October, 5.56% of participants reported having food poisoning, a 16.32% increase from September.



AD HOC QUESTIONS

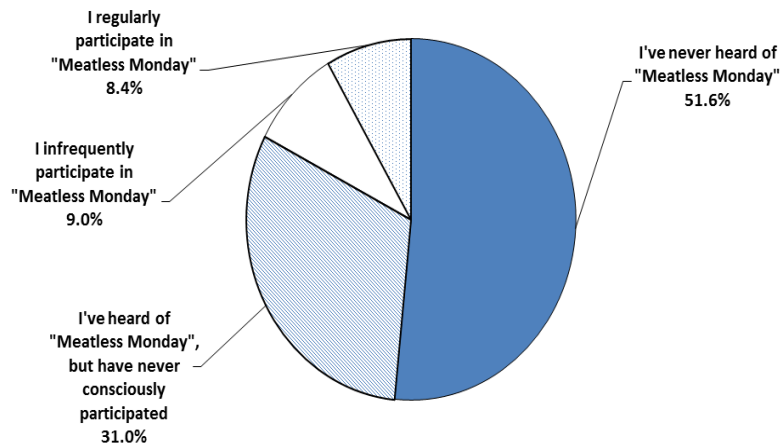


Two new ad hoc questions were added to the October survey.

The first question asked: “Which of the following is true of the last package of bacon you purchased? (check all that apply)”. Over 44% of participants stated the label on the package of bacon purchased contained “none of the above”. About 9% said they bought organic bacon; 13% said they bought “hormone free” bacon. These statistics paint an overly optimistic

picture in terms of the market share of organic and no added hormones/antibiotics. First, added growth hormones are not allowed in pork production. Second, our analysis of recent scanner data spanning a representative sample of grocery stores in the US puts the dollar market shares of organic, “antibiotic free”, and “natural” bacon at only 2.6%, 1.9%, and 0.9%, respectively. In general, the results speak to the propensity for people to give socially desirable answers on certain types of survey questions such as this.

Participation in "Meatless Mondays"



"Meatless Monday" is an international campaign that encourages consumers to refrain from eating meat one day a week for the purported purpose of improving health and the environment. Various media outlets have made claims about the growing popularity of the movement, but firm statistics on the matter are sparse. Thus, we asked the question: "Which of the following best describes your knowledge and involvement with

'Meatless Monday'?" Respondents could pick one (and only one) of four answers. The majority (51.6%) of consumers have never heard of "Meatless Monday". Over 80% (51.6%+31%=82.6%) have never participated in "Meatless Monday." Only 8.4% of participants stated they regularly participate in "Meatless Monday". In a separate question, about 4.7% of consumers indicated that they were vegetarian or vegan, so that leaves only (8.4%-4.7%)=3.7% of the population who regularly participate in Meatless Monday who aren't already vegetarian or vegan.