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 two years. The following information is a summary from the past year (May 2014 to April 2015) Last year's summary can be found on-line in the Volume 1: First Year Summary.

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
May 2014	$6.35	$4.63	$4.06	$3.51	$2.29	$2.01	$2.08	$3.13
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
August 2014	$7.01	$5.05	$4.32	$4.16	$2.68	$2.10	$2.08	$3.36
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
November 2014	$7.00	$5.16	$4.62	$4.02	$2.56	$2.42	$2.20	$3.48
December 2014	$7.80	$5.02	$4.49	$4.08	$2.67	$2.52	$2.35	$3.79
January 2015	$7.28	$5.09	$4.14	$4.04	$2.41	$2.55	$2.33	$3.25
February 2015	$7.92	$5.05	$4.54	$3.81	$2.78	$2.23	$2.31	$2.97
March 2015	$7.89	$5.47	$4.61	$4.25	$2.79	$2.29	$2.82	$3.55
April 2015	$8.02	$5.59	$4.46	$3.97	$2.51	$2.42	$2.33	$3.61

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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 first table. 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 2015 was 126.44, meaning WTP in April 2015 was (126.44 – 100 = 26.44) 26.44% higher than in May 2014. WTP for steak and chicken breast were at their highest in April 2015. Figures 2-4 reveal that WTP for beef, pork, and chick have generally been higher this year compared to last.

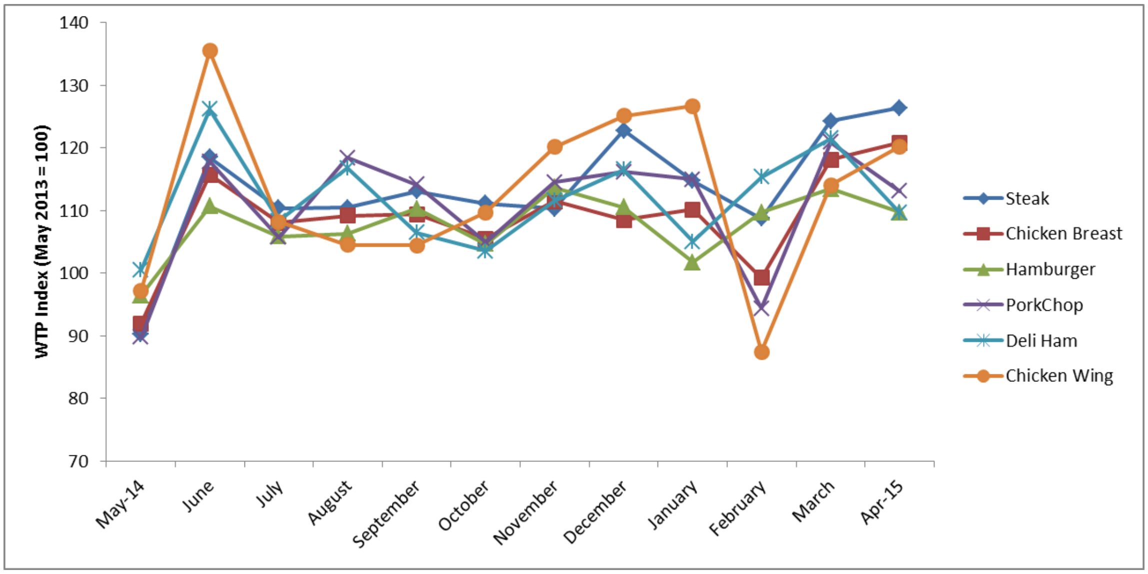

Figure 1: Demand indices for six meat products (May 2013 = 100)

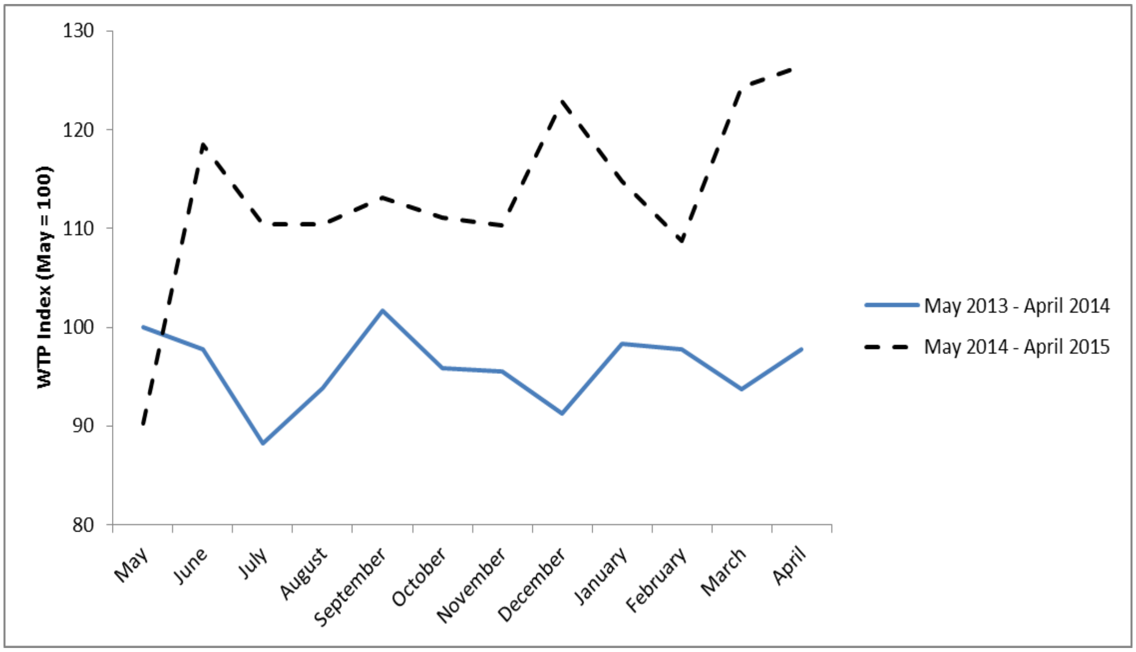

Figure 2: Demand indices for steak over the past two years (May 2013 = 100)

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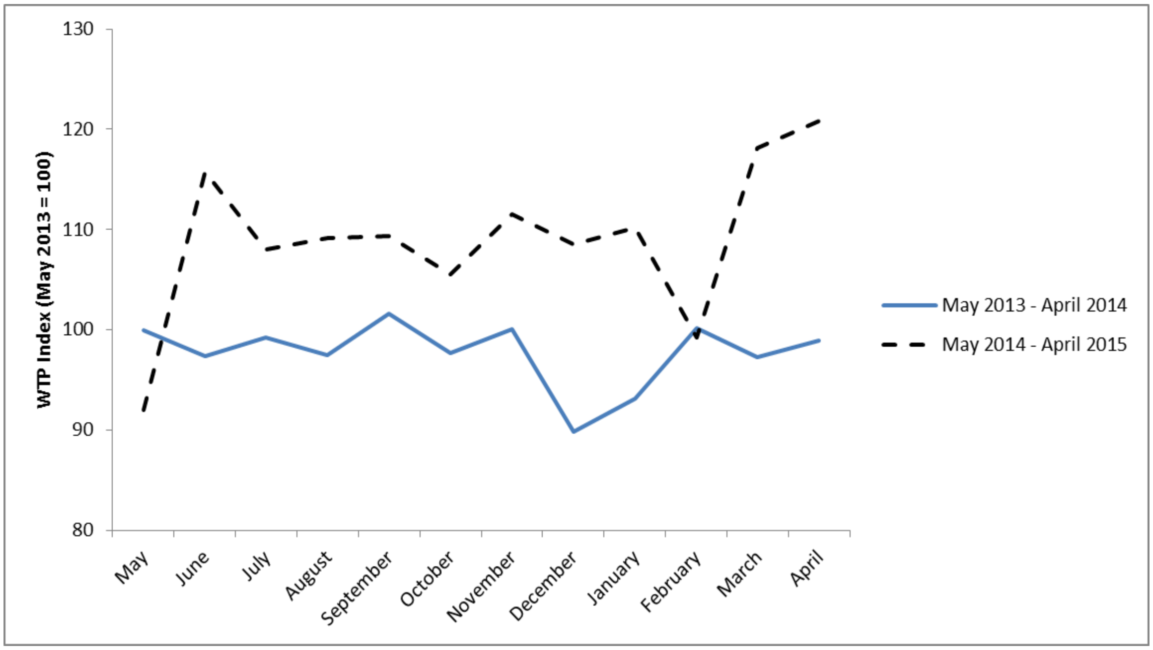

Figure 3: Demand indices for chicken breast over the past two years (May 2013 = 100)

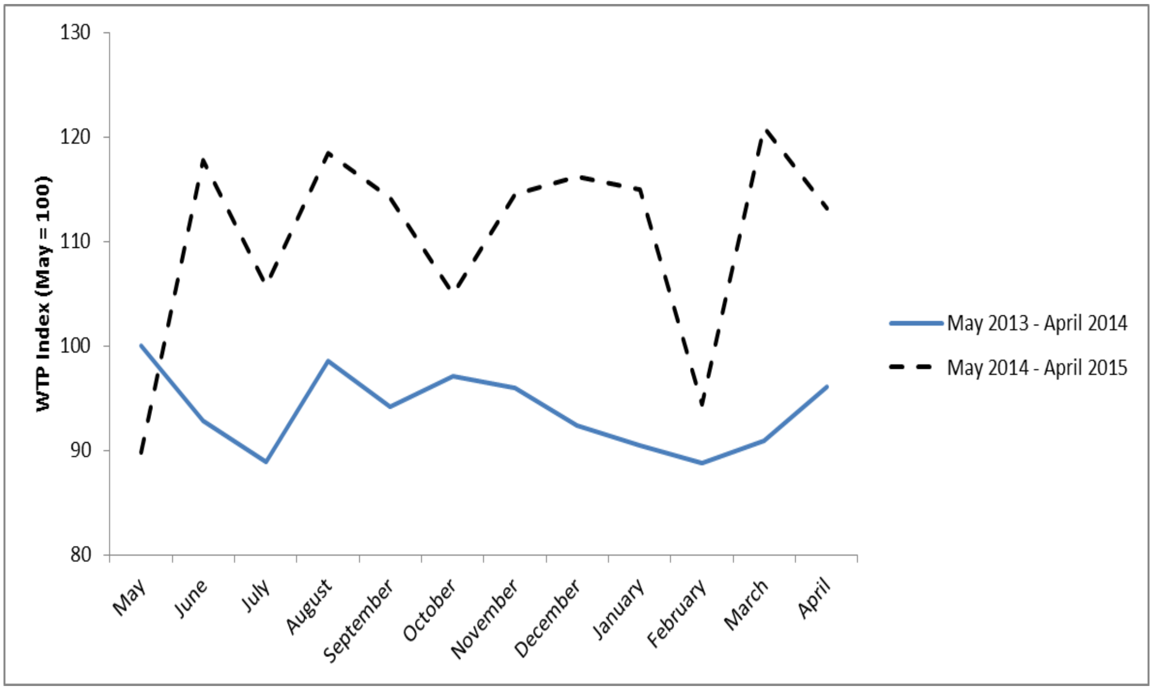

Figure 4: Demand indices for pork chops over the past two years (May 2013 = 100)

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FOOD EXPENDITURES

At home food-grocery expenditures reached a low of $92.96/week in September 2014, and a high of $97.05/week in April 2015. Consumers reported spending the least on food away from home in June 2014 at $46.89/week and the highest in April 2015 at $53.02/week. Consumers continually reported 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 2014	$96.34	$50.15	-0.55%	-1.81%
June 2014	$94.84	$46.89	-0.16%	-1.63%
July 2014	$94.08	$49.61	-0.37%	-1.48%
August 2014	$93.22	$48.90	-0.36%	-1.41%
September 2014	$92.96	$50.30	-0.33%	-1.70%
October 2014	$93.27	$48.12	-0.44%	-1.64%
November 2014	$94.13	$49.91	0.54%	-1.85%
December 2014	$94.05	$49.04	0.69%	-1.46%
January 2015	$92.76	$49.41	-0.75%	-2.06%
February 2015	$94.57	$53.90	-0.08%	-1.32%
March 2015	$97.00	$50.96	-0.46%	-1.40%
April 2015	$97.05	$53.02	-0.21%	-1.24%

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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 June 2014. Consumers reported that they planned to buy more chicken in each month and less pork. In December and February a larger percentage of respondents planned to buy more beef than planned to buy less.

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 higher chicken prices	I expect higher pork prices
May 2014	29.04	-8.96	-13.28	-45.29	40.95	25.37	29.62
June 2014	28.48	-5.58	-12.34	-45.03	45.05	26.05	29.41
July 2014	28.58	-3.65	-12.79	-37.73	34.41	22.12	22.12
August 2014	31.43	1.22	-8.54	-37.16	39.33	21.99	21.99
September 2014	22.84	-6.68	-9.42	-38.32	38.41	24.40	27.92
October 2014	28.07	-4.41	-7.45	-37.97	35.58	22.66	22.66
November 2014	32.10	-5.10	-9.57	-38.29	33.39	20.19	21.40
December 2014	31.81	0.06	-6.66	-34.88	31.96	13.95	20.31
January 2015	30.81	-3.62	-8.42	-42.93	32.91	17.57	20.29
February 2015	33.45	2.54	-4.34	-30.71	34.01	18.82	20.08
March 2015	32.26	-1.31	-3.64	-33.03	30.79	12.23	16.17
April 2015	30.42	-4.55	-10.24	-36.02	27.62	14.89	16.38

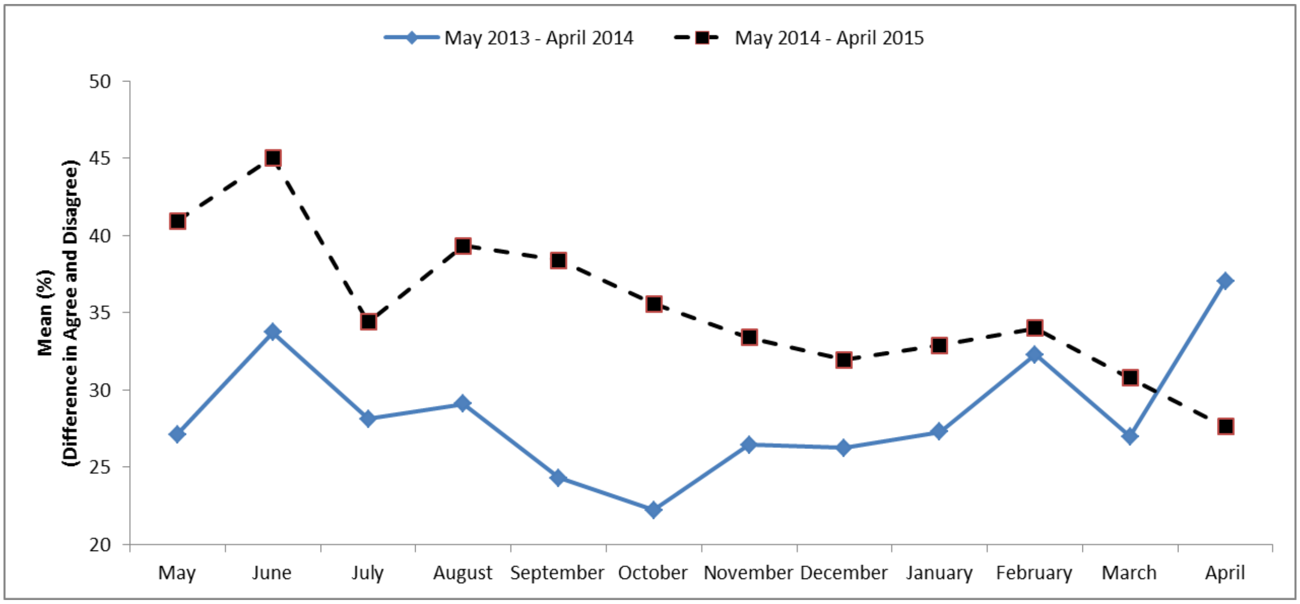

Figure 5: Future Price Expectations for Beef. Difference in percent agree and disagree that beef prices will rise.

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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 remained the top four issues consumers report hearing most about in the news. As shown in Figure 6, a significant increase in awareness was seen for Salmonella from August 2014 through September 2014 and a decrease in *E. coli* in March 2015. GMOs, Salmonella, *E. coli*, and hormones also remained as the issues of most concern among consumers in the past year. Concern for all food issues fell in December and rose in January, as shown in Figure 7.

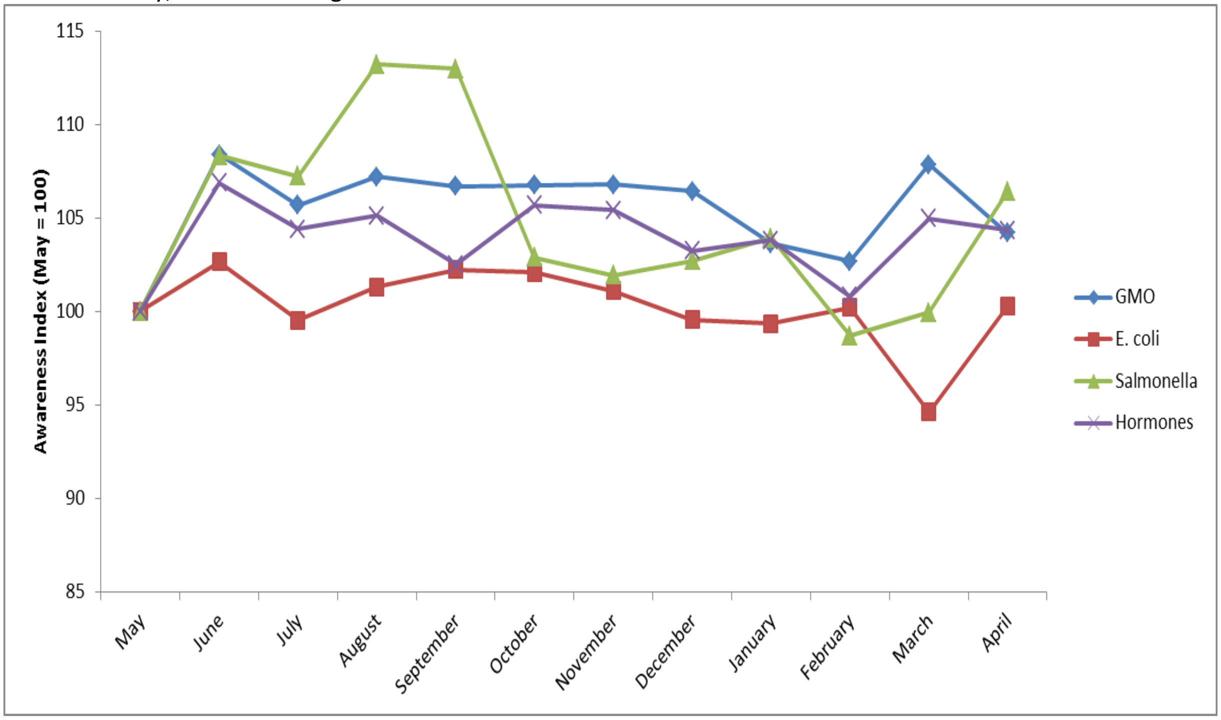

Figure 6: Awareness of four issues in the news (May 2014 = 100)

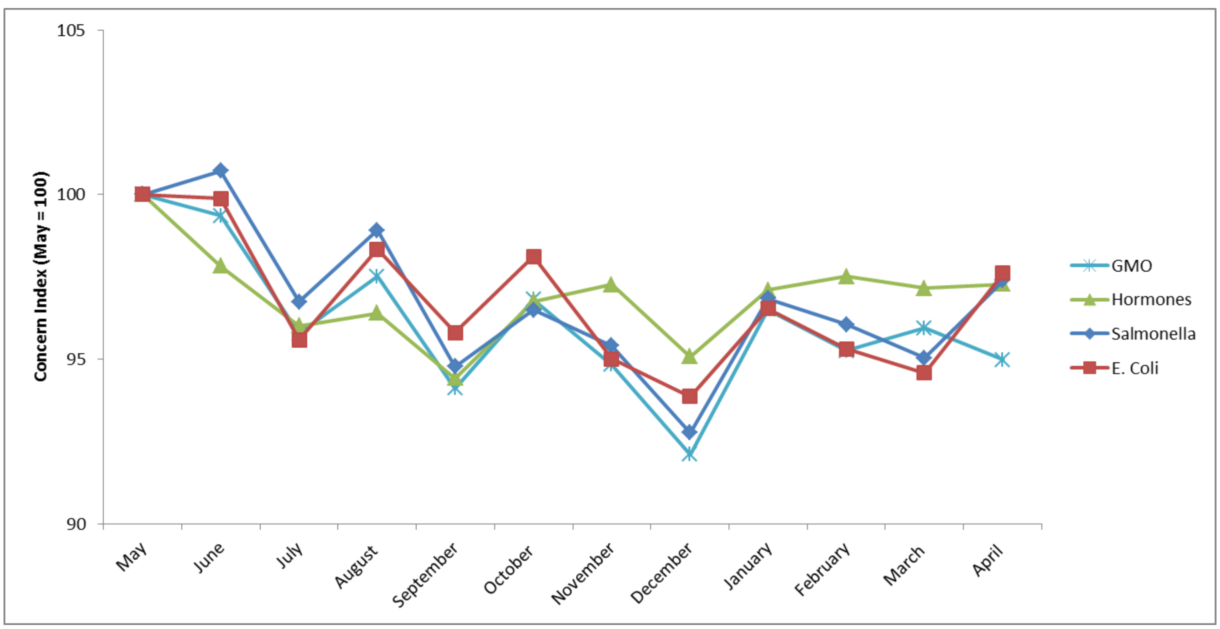

Figure 7: Concern for four issues in the news (May 2014 = 100)

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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 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015	February 2015	March 2015	April 2015
Salmonella	2.16	2.34	2.32	2.44	2.44	2.22	2.20	2.22	2.24	2.21	2.16	2.30
E. Coli	2.26	2.32	2.25	2.30	2.31	2.31	2.29	2.25	2.25	2.25	2.14	2.27
GMO	2.19	2.37	2.31	2.34	2.33	2.33	2.33	2.32	2.65	2.33	2.36	2.28
Hormones	2.08	2.22	2.17	2.19	2.13	2.20	2.19	2.15	2.16	2.18	2.18	2.17
Farm Animal Welfare	2.07	2.12	2.07	2.10	2.07	2.10	2.11	2.11	2.10	2.15	2.11	2.15
Antibiotics	2.05	2.14	2.06	2.16	2.08	2.11	2.07	2.11	2.12	2.15	2.14	2.18
Bird Flu	1.90	1.86	1.91	1.87	1.91	1.92	1.92	1.95	1.99	2.01	1.89	2.04
Swine Flu	1.97	2.04	2.03	2.04	2.02	2.04	1.96	1.97	2.05	2.05	1.96	2.00
Mad cow	1.90	2.06	1.98	1.99	1.98	2.00	1.96	1.93	2.00	1.99	1.91	1.97
Pink Slime	1.90	1.94	1.93	2.00	1.96	1.91	1.93	1.93	1.93	1.95	1.85	1.88
Cloning	1.68	1.73	1.78	1.78	1.72	1.77	1.77	1.76	1.78	1.82	1.76	1.78
LFTB	1.74	1.78	1.81	1.78	1.82	1.83	1.81	1.81	1.85	1.87	1.78	1.83
Gestation Crates	1.57	1.59	1.64	1.63	1.61	1.60	1.64	1.69	1.69	1.69	1.66	1.66
Battery Cages	1.59	1.59	1.61	1.61	1.62	1.64	1.64	1.66	1.73	1.70	1.66	1.70
BSE	1.51	1.52	1.58	1.54	1.53	1.54	1.53	1.58	1.61	1.61	1.59	1.62
Greenhouse Gas	1.80	1.87	1.88	1.85	1.92	1.93	1.91	1.94	1.91	1.93	1.93	1.91
Beta-Agonist	1.49	1.50	1.56	1.55	1.56	1.56	1.53	1.54	1.61	1.61	1.59	1.60

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Table 5: Concern for 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 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015	February 2015	March 2015	April 2015
Salmonella	3.51	3.54	3.40	3.47	3.33	3.39	3.35	3.26	3.40	3.37	3.34	3.42
E. Coli	3.52	3.51	3.36	3.46	3.37	3.45	3.34	3.30	3.40	3.35	3.33	3.43
Hormones	3.40	3.33	3.27	3.28	3.21	3.29	3.31	3.24	3.30	3.32	3.31	3.31
Antibiotics	3.34	3.23	3.29	3.30	3.22	3.30	3.25	3.21	3.33	3.25	3.33	3.30
Farm Animal Welfare	3.39	3.26	3.26	3.24	3.18	3.30	3.22	3.16	3.23	3.26	3.27	3.30
GMO	3.42	3.39	3.27	3.33	3.21	3.31	3.24	3.15	3.30	3.25	3.28	3.24
Pink Slime	3.19	3.18	3.03	3.13	3.01	3.16	3.06	3.00	3.09	3.10	3.05	3.03
Swine Flu	3.16	3.17	3.11	3.08	2.97	3.05	2.93	2.90	3.06	3.05	2.97	3.05
Cloning	3.23	3.15	3.11	3.12	2.98	3.07	2.96	2.94	3.08	3.05	2.97	3.03
Bird Flu	3.19	3.16	3.07	3.05	2.96	3.04	2.91	2.86	3.01	3.01	2.93	3.08
Mad Cow	3.14	3.09	3.01	3.05	2.96	3.08	2.95	2.93	3.00	3.03	2.98	3.07
Gestation Crates	3.03	2.96	2.85	2.93	2.83	2.91	2.88	2.83	2.90	2.93	2.90	2.96
Battery Cages	3.00	2.96	2.93	2.93	2.88	2.95	2.84	2.86	2.91	2.95	2.94	2.97
Greenhouse Gas	2.93	2.89	2.84	2.90	2.84	2.93	2.82	2.80	2.91	2.91	2.90	2.97
BSE	2.92	2.89	2.84	2.90	2.84	2.93	2.78	2.77	2.86	2.90	2.82	2.87
Lean Fine Textured Ground Beef	3.00	2.96	2.91	2.95	2.86	2.89	2.84	2.78	2.88	2.94	2.88	2.92
Beta-agonist	2.91	2.86	2.85	2.86	2.78	2.88	2.77	2.74	2.85	2.87	2.80	2.89

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GENERAL FOOD VALUES

Taste, safety, price, and nutrition have remained consumer's top four values throughout the course of the FooDS survey, while fairness and novelty have remained the values 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 January.

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	Appear-ance	Animal Welfare	Natural-ness	Origin	Environ-ment	Conven-ience	Fairness	Novelty
May 2014	0.64	0.57	0.50	0.42	0.01	-0.13	-0.13	-0.30	-0.25	-0.28	-0.35	-0.69
June 2014	0.63	0.63	0.46	0.45	-0.01	-0.08	-0.15	-0.34	-0.29	-0.30	-0.32	-0.68
July 2014	0.63	0.60	0.51	0.43	0.03	-0.16	-0.18	-0.28	-0.34	-0.26	-0.34	-0.65
August 2014	0.63	0.56	0.49	0.43	0.05	-0.15	-0.21	-0.26	-0.32	-0.25	-0.34	-0.61
September 2014	0.64	0.54	0.53	0.43	0.01	-0.10	-0.22	-0.21	-0.29	-0.24	-0.38	-0.69
October 2014	0.64	0.61	0.50	0.35	0.05	-0.15	-0.17	-0.27	-0.30	-0.26	-0.33	-0.67
November 2014	0.61	0.56	0.49	0.41	0.02	-0.12	-0.17	-0.30	-0.27	-0.25	-0.35	-0.63
December 2014	0.67	0.56	0.52	0.34	0.05	-0.13	-0.19	-0.27	-0.29	-0.27	-0.33	-0.66
January 2015	0.63	0.56	0.46	0.41	0.01	-0.16	-0.18	-0.21	-0.27	-0.25	-0.33	-0.66
February 2015	0.61	0.55	0.47	0.39	0.05	-0.11	-0.18	-0.25	-0.29	-0.24	-0.33	-0.66
March 2015	0.66	0.56	0.40	0.43	0.03	-0.08	-0.15	-0.28	-0.26	-0.29	-0.33	-0.68
April 2015	0.62	0.50	0.47	0.44	-0.01	-0.10	-0.14	-0.29	-0.25	-0.26	-0.32	-0.66

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 2014	5.10	4.33	4.09	3.99	3.96	3.75	2.79
June 2014	5.08	4.40	4.17	3.93	3.93	3.80	2.67
July 2014	5.09	4.25	4.04	4.03	3.93	3.84	2.81
August 2014	5.06	4.34	4.05	4.02	3.96	3.86	2.71
September 2014	5.05	4.11	4.03	3.98	4.16	3.91	2.76
October 2014	5.04	4.21	4.00	4.07	4.08	3.81	2.78
November 2014	5.02	4.23	3.96	4.13	4.06	3.88	2.71
December 2014	5.06	4.20	3.95	4.01	4.00	3.91	2.87
January 2015	4.97	4.18	4.00	4.18	4.06	3.79	2.82
February 2015	4.91	4.28	4.12	3.95	4.03	3.88	2.83
March 2015	4.93	4.19	3.99	4.04	4.28	3.84	2.73
April 2015	4.85	4.30	4.05	4.13	4.06	3.89	2.72

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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 8. February 2015 had the highest frequency of food-stamp participants. February 2015 saw the largest percent of people who reported being vegetarian or vegan at 6.50%. Reported food poisoning was also highest in February 2015 at 6.82%.

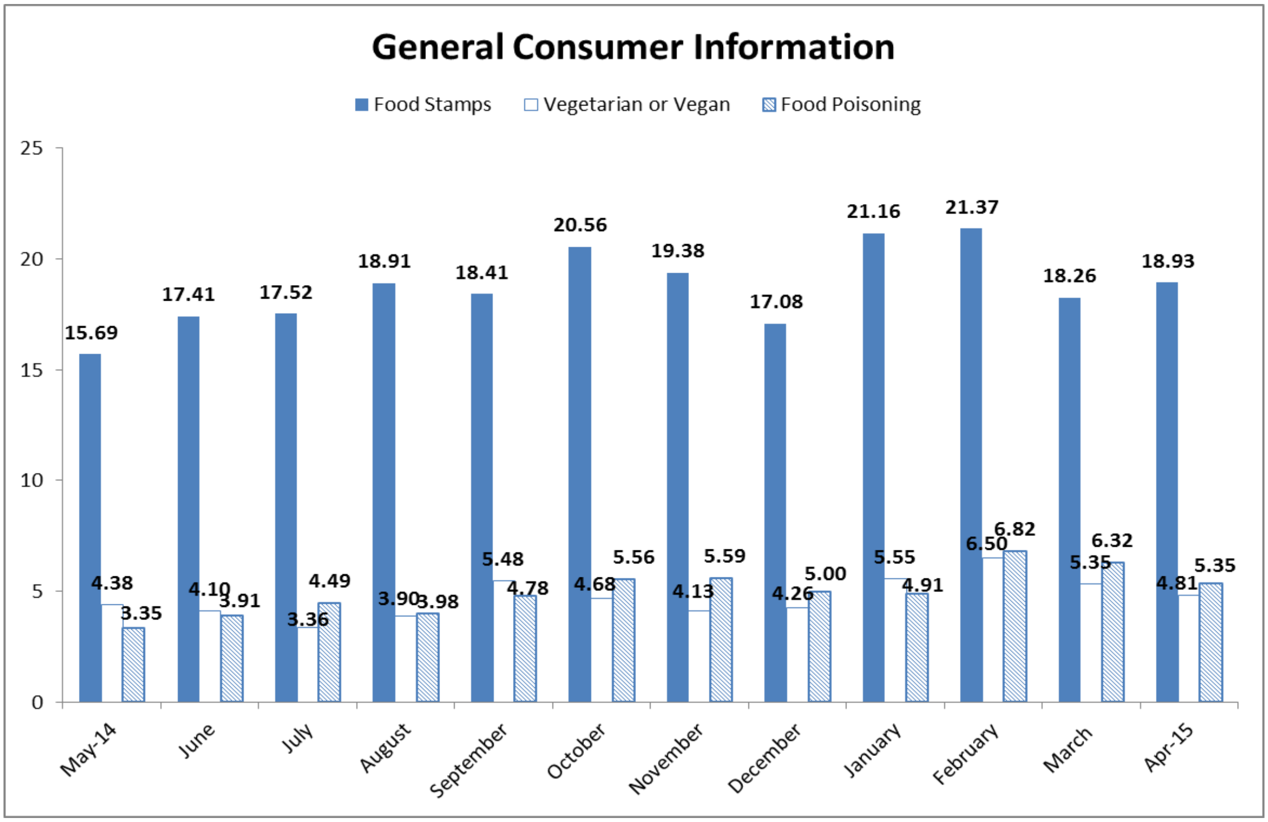

Figure 8: General consumer information covering food stamps, vegetarian or vegan preferences, or food poisoning. Calculated as a mean of the population (%)

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.

- “Ag-gag” laws
- Price estimates and consumer confidence when purchasing meat in the supermarket
- Purchasing of pasteurized and unpasteurized milk
- Decisions on food policy issues
- Labeling on bacon packaging
- Participation in “Meatless Monday’s”
- Consumer knowledge of food labeling
- Country of origin labeling (COOL) laws for U.S. pork producers
- Consumer’s willingness-to-pay (WTP) for COOL labeling
- Support for or opposition to various government policies
- Consumer beliefs about genes and support for DNA labels
- Food borne illnesses in farmers markets and supermarkets
- Consumer’s beliefs about dietary guidelines
- Consumer beliefs about Bisphenol A (BPA)
- Consumer beliefs about McDonald’s versus Chipotle

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