

### 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

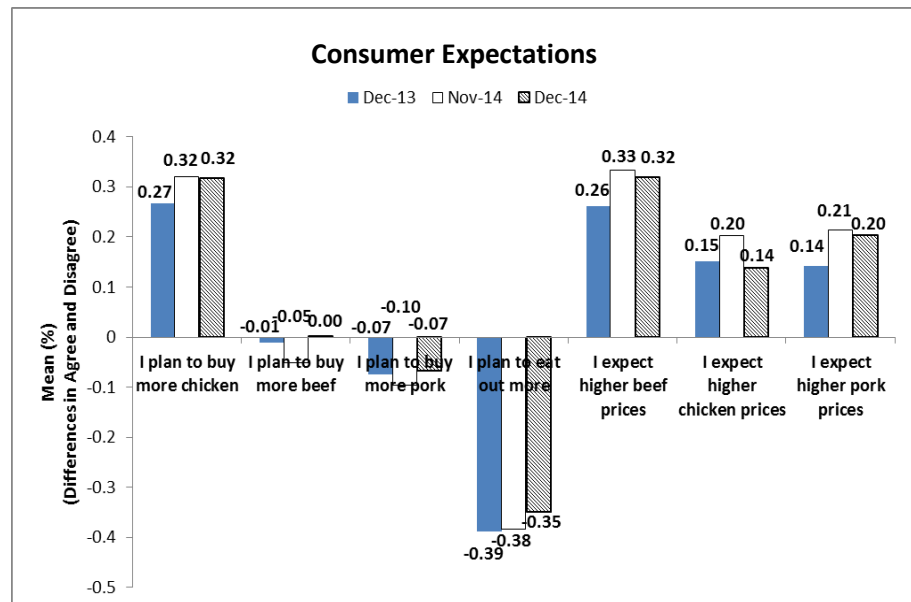
Willingness- to- Pay	Steak	Chicken Breast	Hamburger	Pork Chop	Deli Ham	Chicken Wing	Beans and Rice	Pasta
Last Year: December 2013	\$6.41	\$4.52	\$4.20	\$3.61	\$2.21	\$1.93	\$1.97	\$3.40
Last Month: November 2014	\$7.00	\$5.16	\$4.62	\$4.02	\$2.56	\$2.42	\$2.20	\$3.48
December 2014	\$7.80	\$5.02	\$4.49	\$4.08	\$2.67	\$2.52	\$2.35	\$3.79
% change (Nov. – Dec.)	11.43%	-2.71%	-2.81%	1.49%	4.30%	4.13%	6.82%	8.91%

Willingness-to-pay (WTP) for all products increased from one month ago, except chicken breast and hamburger. WTP for steak increased 11% from one month ago. WTP for all meat products remain higher relative to this time last year.

### FOOD EXPENDITURES

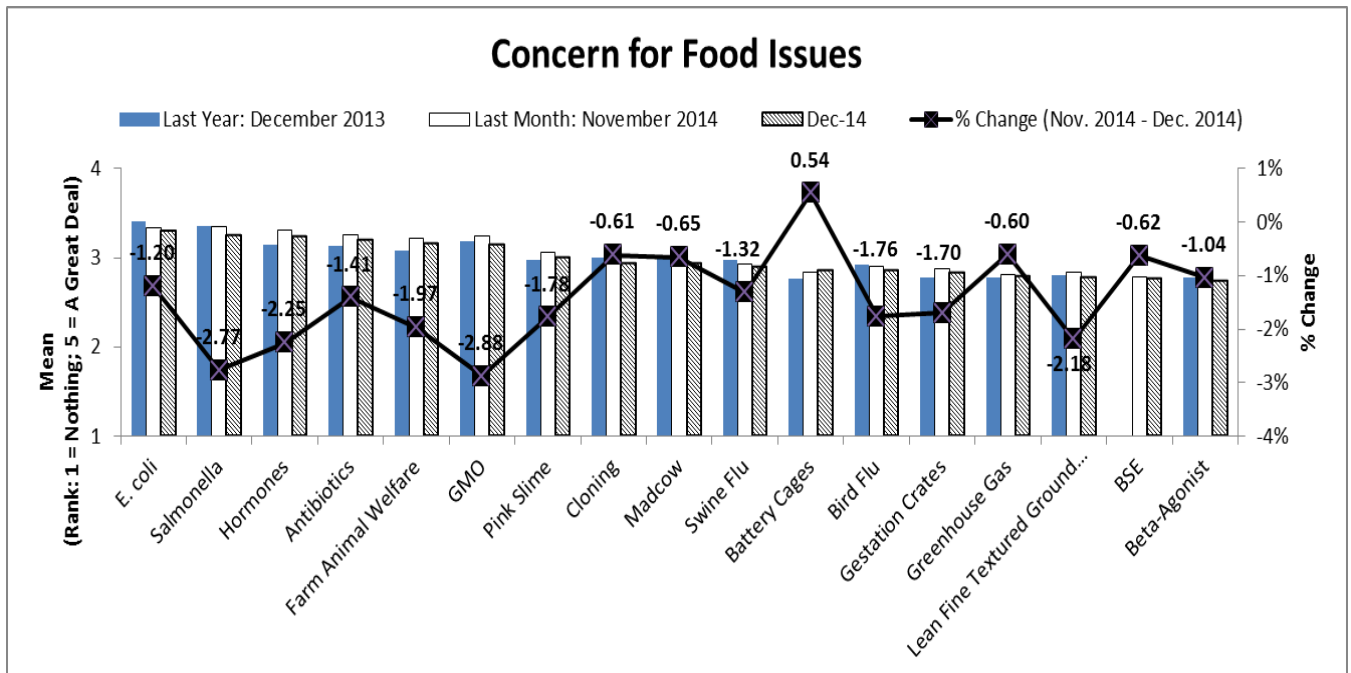
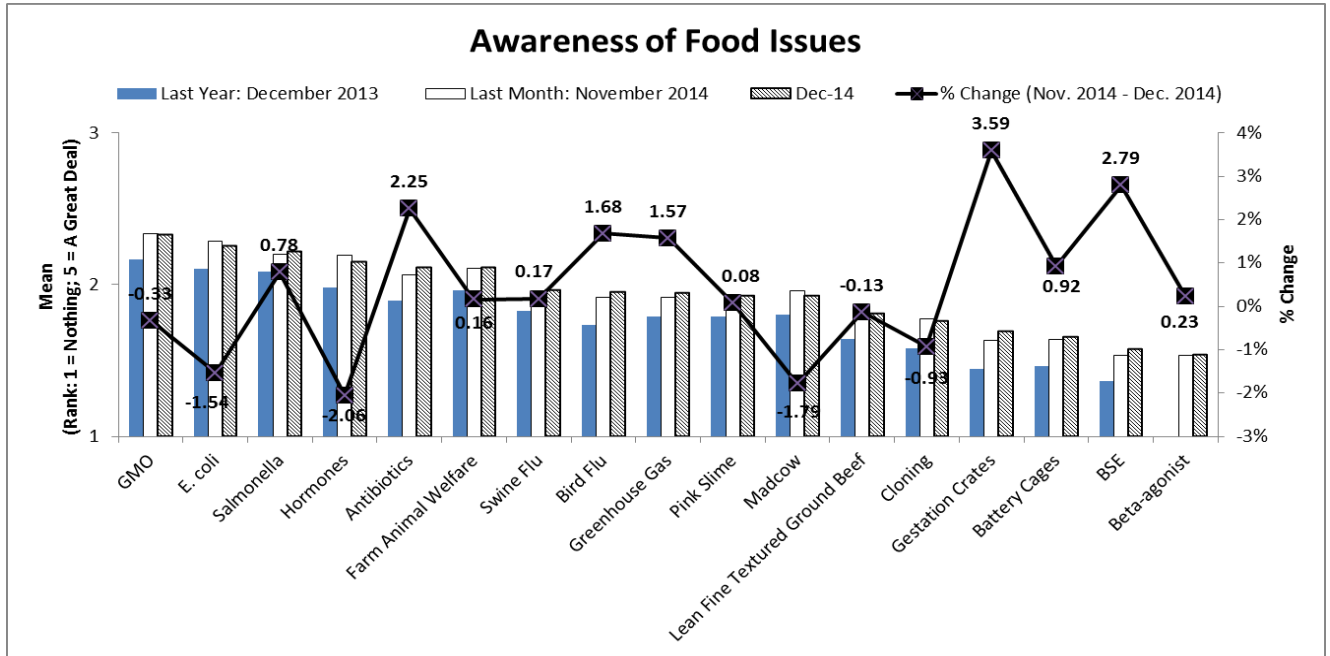
	Current weekly at home	Current weekly away from home	Anticipated change in at home in next 2 weeks	Anticipated change away from home in next 2 weeks
December 2013	\$91.40	\$43.95	0.21%	-1.63%
November 2014	\$94.13	\$49.91	0.54%	-1.85%
December 2014	\$94.05	\$49.04	0.69%	-1.46%
% change (Nov. – Dec.)	-0.08%	-1.74%		

In December, food-grocery expenditures were \$94.05, down slightly from November. \$49.04 was spent on food consumed away from home, down 1.74% from November. While consumers continue to expect higher meat prices, inflationary expectations are lower this month compared to last. Expected purchasing patterns remain similar to previous months, with slight a decrease in planned purchases of pork.



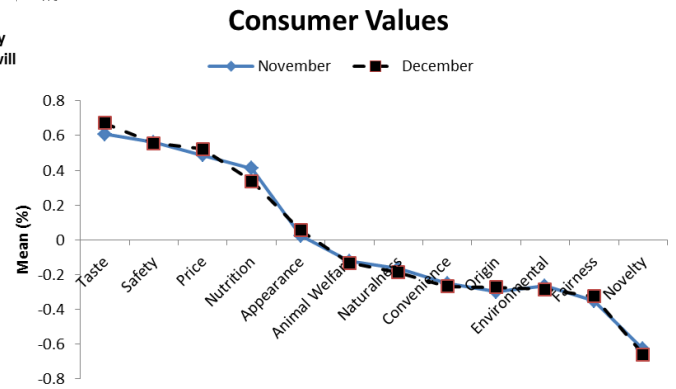
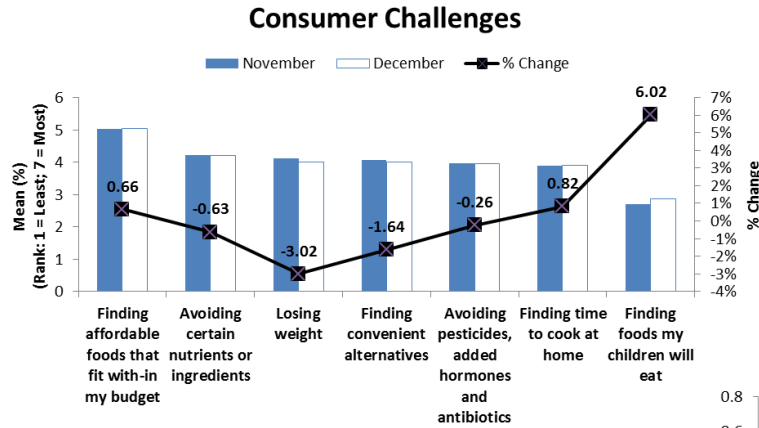
## AWARENESS & CONCERN TRACKING

GMO, *E. coli*, and *Salmonella* remained the most visible issues in the news over the past two weeks. The largest percentage jump in awareness from November to December was for gestation crates. The largest percentage fall from November to December was for hormones. Across the board, awareness was higher this year compared to last. *E. coli*, *Salmonella*, and hormones were ranked as the top three concerns during December. Concern decreased for all issues, except battery cages, from November to December. The largest percent decrease from last month was for GMO and *Salmonella* while the largest percent increase was for battery cages.



## GENERAL FOOD VALUES

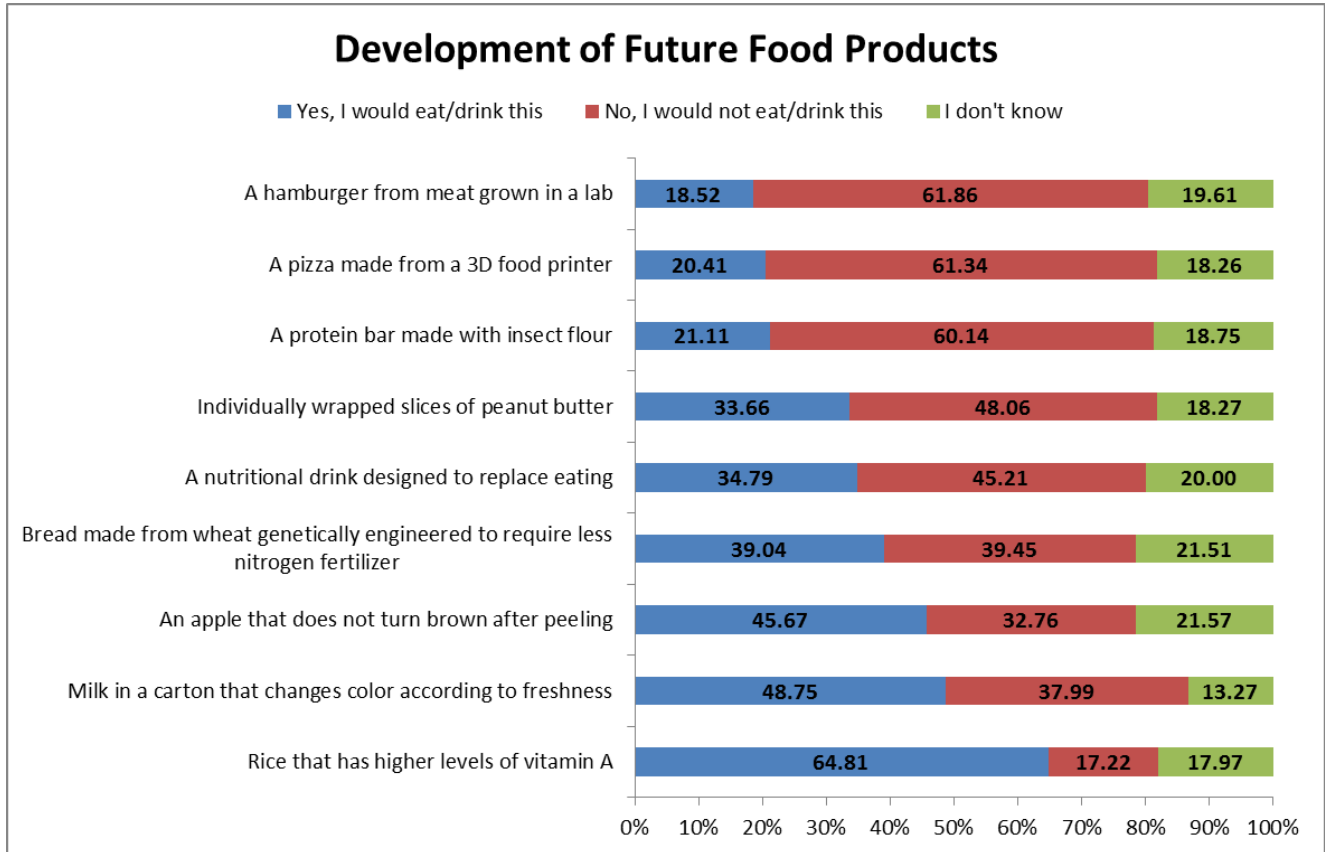
Taste, safety and price remained consumer's most important values when purchasing foods. Consumer values remained similar to those in past months, with an increase in perceived value of taste and a decrease in perceived value of nutrition. Similar to previous months, consumers reported that their main challenge was finding affordable foods that fit within their budget. Finding time to cook at home and finding food children will eat remained last, as in previous months. In December, 5% of participants reported having food poisoning, a 10.5% decrease from November.



**AD HOC QUESTIONS**

Three new ad hoc questions were added to the survey this month.

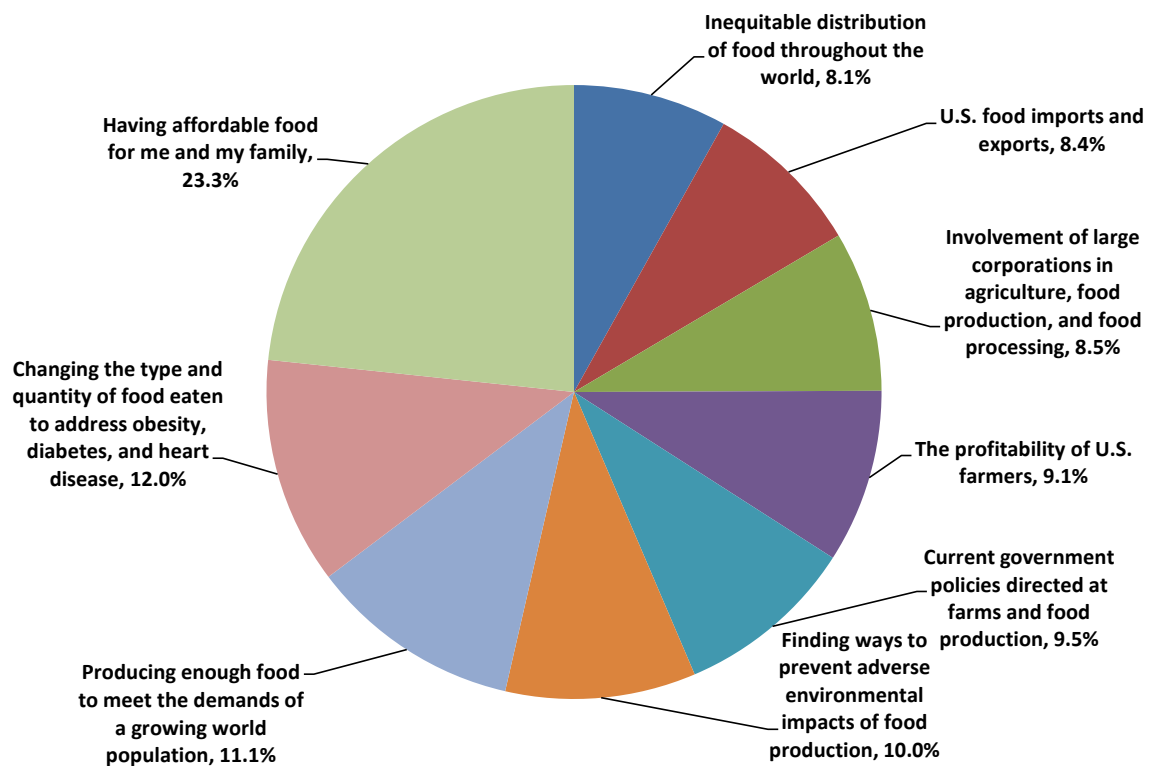
The first question asked: “Scientists are currently working to develop food products that might become available in the future. If it were possible, would you be willing to eat or drink the following foods?” Respondents were asked to select “Yes, I would eat/drink this”, “No, I would not eat/drink this”, or “I don’t know” for each item.



64.81% of respondents stated they would be willing to eat rice with a higher level of vitamin A. Just under half the respondents stated they would eat an apple that does not turn brown after peeling and they would drink milk in a carton that changes color according to freshness. Only about 20% of respondents said they’d eat a hamburger from meat grown in a lab, eat a pizza from a 3D food printer, or eat a protein bar made with insect flour.

Secondly, participants were asked “Thinking about the future, which of the following food and agriculture challenges are you most concerned about?” Participants were shown nine items (randomly ordered across respondents) and were asked to rank these items from most to least concerned. The rankings were used in a statistical model to estimate scores for each issue that sum up to 100%. The issue of largest concern was “Having affordable food for me and my family,” with a concern score of 23.3%. By contrast, the issue of least concern was “Inequitable distribution of food throughout the world.” Affordable food was 23.3/8.1= 2.87 times more important than inequitable distribution. The second and third most concerning issues were “Changing the type and quantity of food eaten to address obesity, diabetes, and heart disease” and “Producing enough food to meet the demands of a growing world population.”

## Thinking about the future, which of the following food and agriculture challenges are you most concerned about?



Immediately following the previous question, participants were asked “Several challenges facing the food and agricultural sector were mentioned in the previous question. Which of the two following option do you believe would be most effective in addressing the challenges you thought were most concerning?” 76.23% of respondents chose the option that stated “adopting a more ‘natural’ agricultural production system – more local, organic unprocessed crops and food” would be most effective in addressing these challenges. Only 23.77% chose the other option which read: “adopt a more ‘technological’ agricultural system – more innovation, science, and research in crops and food”.

Which of the two following options do you believe would be most effective in addressing the challenges you thought were most concerning?

