

Consumers Union Mad Cow Disease Survey

January 27, 2004

Methodology

- ◆ **A total of 1,085 online surveys were conducted among a random sample of U.S. adults. The margin of error at a 95% confidence level is +/- 3 percentage points.**

- ◆ **Interviewing took place over January 14-21.**

- ◆ **Respondents were screened for:**
 - **Awareness of the recent discovery of mad cow disease (MCD) in the U.S.—awareness was almost universal (99.5%).**
 - **At least occasional consumption of beef—95% passed. Those who never eat beef were not presented with questions related to beef consumption.**

- ◆ **The demographic questions included region.**
 - **Northeast: CT, MA, ME, NH, NJ, NY, PA, RI, VT**
 - **Midwest: IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI**
 - **South: AK, AL, DC, DE, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV**
 - **West: AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY**

Implications

- ◆ **The discovery last month in Washington of a cow infected with mad cow disease was widely publicized and swiftly captured public attention. Indeed, the Consumers Union survey of U.S. adults revealed nearly universal awareness of the problem, across age, gender, household income and region. Mad cow disease is a real issue for Americans as 95% of surveyed adults eat beef at least occasionally, though other recently conducted research questions the scale of the perceived threat.**
 - **A poll conducted in early January by Gallup found that only 16% of adults are worried about MCD, and a Wall Street Journal Online/Harris Interactive survey showed that nearly 90% are confident that the government will take the necessary steps to ensure that MCD does not spread.**
 - **The Consumers Union survey indicated more concern—nearly one-third of Americans reported that they are concerned or very concerned about the safety of beef as a result of the discovery of MCD in the U.S.**

- ◆ **These topline results, however, obscure deeper mistrust of the U.S. beef supply. While only a minority in our study expressed concern about MCD, 71% of adults who eat beef told us they would pay more to support testing of cattle to ensure that they are free of MCD. Of these, virtually everyone (95%) would be willing to pay 10 cents more per pound, the upper limit of the estimated cost of testing. The majority (77%) of beef eaters would pay more for beef certified as testing negative for MCD, if certified and non-certified varieties were available at the store.**

- ◆ **One-third of adults we surveyed will eat less beef or give up beef altogether in response to the discovery of MCD in the U.S. Eighty percent of these will substitute poultry, and two-thirds will add fish.**

Implications (cont.)

- ◆ **Participants in the Consumers Union survey also believe that government should play an active role in protecting the public. Asked how government should respond to the discovery of MCD:**
 - **Almost 90% agreed strongly that the USDA should have the authority to recall contaminated meat from the food supply.**
 - **About 8 in 10 agreed strongly that the FDA should prohibit the feeding of animal remains to cows.**
 - **8 in 10 also agreed strongly that in the event of a recall, the USDA should make public the names of stores/restaurants that sold contaminated meat.**
 - **Nearly 6 in 10 agreed strongly that the USDA should test all cows at slaughter for MCD.**

- ◆ **Finally, half of respondents assessed MCD as a major problem or crisis among the public health issues currently facing the nation. Comparative readings on other public health issues: 91% for AIDS, 75% for antibiotic-resistant bacterial infections, 55% for *E. coli* contamination of food and 49% for SARS.**

Concern About Beef Safety

- ◆ Roughly 3 in 10 adults are concerned or very concerned about the safety of beef subsequent to the discovery of MCD in the U.S.
 - Those who are young, lower income, female or live in the Northeast expressed more concern than average.
 - Those with the highest income and residents of the Midwest, South or West were least likely to be concerned about MCD.
 - Families with children under age 18 living at home reported average concern.

Concern About Safety of Beef

	Aware		Age			Household Income			Gender		Region			
	Total	Kids	18-34	35-54	55+	<\$60K	\$60-99K	\$100K+	Men	Women	NE	MW	South	West
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
<i>Top-Two Box</i>	31	31	34	31	28	36	23	20	25	37	38	29	29	31
Very concerned	12	13	14	13	8	14	9	5	8	16	13	12	13	11
Concerned	19	18	20	18	20	22	14	15	17	21	25	17	17	20
Somewhat concerned	42	42	39	43	42	39	45	47	40	43	41	40	41	43
Not at all concerned	27	27	27	26	30	25	32	33	35	21	21	31	29	26

Government Response to MCD

Top Box Agreement

- ◆ Respondents were asked about how government should respond to the discovery of MCD.
 - About 90% agreed strongly that the USDA should be able to recall contaminated meat.
 - Roughly 8 in 10 felt that cows should not be fed animal remains.
 - The same proportion agreed strongly that sellers of contaminated meat should have their names publicized.
 - About 6 in 10 called for the USDA to test all cows for MCD.

- ◆ Women uniformly agreed more with the statements than men, but other demographic differences were not a significant factor.

Agreement With Statement (Strongly Agree)

	Aware Total %	Kids %	Age			Household Income			Gender		Region			
			18-34 %	35-54 %	55+ %	<\$60K %	\$60-99K %	\$100K+ %	Men %	Women %	NE %	MW %	South %	West %
USDA should have authority to recall contaminated meat from food supply.	89	91	89	89	85	88	90	90	85	92	86	88	88	91
FDA should prohibit the feeding of animal remains to cows.	79	77	74	79	79	78	83	64	75	82	78	77	79	79
In event of recall, USDA should make public the names of stores/restaurants that sold contaminated meat.	78	81	73	79	75	75	79	76	72	81	79	76	76	76
USDA should test all cows at slaughter for mad cow disease.	58	59	61	55	57	61	53	44	47	66	64	56	57	53

Base: Total Answering

Willing to Pay More to Support MCD Testing

Filter: Eat Beef

- ◆ More than 7 in 10 U.S. adults who eat beef are willing to pay more for beef to support testing of cattle to ensure that they are free of MCD.
 - Those with high income, women and residents of the Northeast expressed the most willingness.

Will Pay More for Beef to Support Testing of Cattle to Ensure They Are Free of MCD

Filter: Eat Beef

Aware		Age			Household Income			Gender		Region			
Total	Kids	18-34	35-54	55+	<\$60K	\$60-99K	\$100K+	Men	Women	NE	MW	South	West
%	%	%	%	%	%	%	%	%	%	%	%	%	%
71	74	74	71	69	70	73	76	64	77	78	67	72	68
29	26	26	29	31	30	27	24	36	23	22	33	28	32

Willing to Pay 10 Cents More Per Pound

Filter: Eat Beef & Willing to Pay More

- ◆ Among those who eat beef and are willing to pay more for beef, virtually everyone would pay a dime more per pound to support testing of cattle to ensure that they are free of MCD.
- ◆ Notably, age, income and other demographics had only a modest impact on willingness to pay 10 cents more per pound.

Will Pay 10 Cents More Per Pound of Beef To Support Testing

Filter: Eat Beef & Will Pay More for Beef to Support Testing

Aware		Age			Household Income			Gender		Region			
Total	Kids	18-34	35-54	55+	<\$60K	\$60-99K	\$100K+	Men	Women	NE	MW	South	West
%	%	%	%	%	%	%	%	%	%	%	%	%	%
95	96	96	96	90	95	96	91	92	97	96	94	93	96
5	4	4	4	10	5	4	9	8	3	4	6	7	4

Yes
No

Willing to Pay More for Certified Beef

Filter: Eat Beef

- ◆ More than three-quarters of beef eaters would pay more for beef certified as testing negative for MCD, if certified and non-certified varieties were available at the supermarket.
- ◆ Families with minor children at home, women and Northeasterners are especially willing to pay more for certified beef.

Will Pay More for Certified Beef if Both Types Offered

		<i>Filter: Eat Beef</i>												
Aware		Age			Household Income			Gender		Region				
Total	Kids	18-34	35-54	55+	<\$60K	\$60-99K	\$100K+	Men	Women	NE	MW	South	West	
%	%	%	%	%	%	%	%	%	%	%	%	%	%	
Yes	77	82	80	77	73	78	75	76	69	84	84	76	75	74
No	23	18	20	23	27	22	25	24	31	16	16	24	25	26

Behavioral Change Due to MCD

Filter: Eat Beef

- ◆ One-third of beef eaters plan to eat less beef or stop eating beef altogether as a result of the discovery of MCD in the U.S.
 - People under age 35, women and residents of the Northeast are most likely to lower their beef consumption.
 - Men and the highest-income segment are least likely to eat less beef.

Response to Discovery of Mad Cow Disease

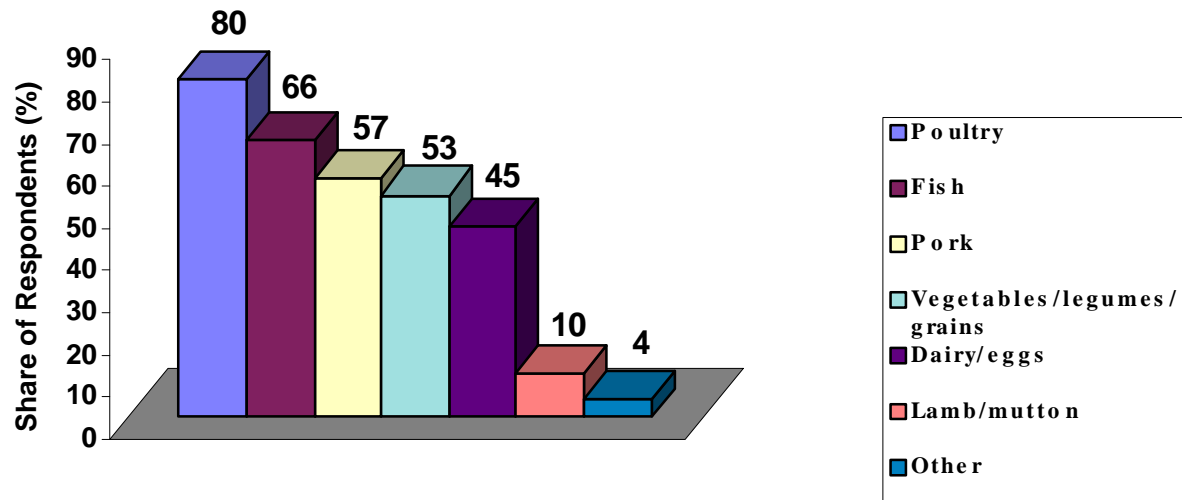
	<i>Filter: Eat Beef</i>													
	Aware	Kids	Age			Household Income			Gender		Region			
	Total %		18-34 %	35-54 %	55+ %	<\$60K %	\$60-99K %	\$100K+ %	Men %	Women %	NE %	MW %	South %	West %
<i>Top-Two Box: Eat Less/No Beef</i>	33	33	38	33	28	35	29	25	24	41	40	28	33	30
Stop eating beef	3	2	4	2	3	2	4	0	2	4	5	2	2	3
Reduce consumption of beef	30	31	34	31	25	32	25	25	22	38	35	26	32	28
Eat as much beef as before	67	66	62	67	70	65	68	74	75	58	60	71	66	69
Increase consumption of beef	1	1	0	0	2	0	3	1	1	1	1	1	1	1

Bad News for Chickens

Filter: Will Eat Less Beef

- ◆ Those planning to eat less beef because of MCD will substitute a variety of foods.
 - Eight in 10 will add some poultry.
 - Two-thirds will substitute fish.
 - More than half will turn to pork or vegetables.

Foods Substituting for Beef Removed From Diet

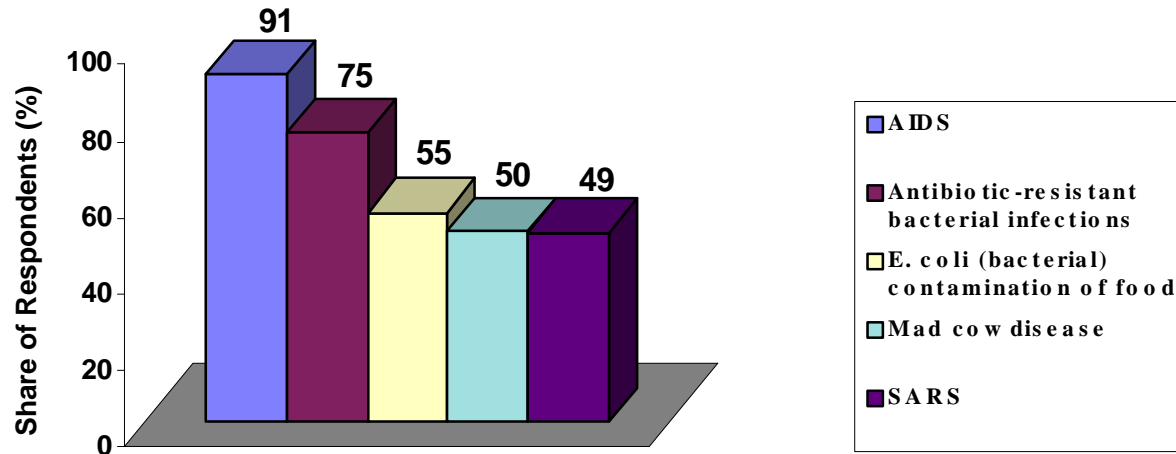


Assessment of Public Health Issues

Top-Two Box: Major Problem or Crisis

- ◆ Respondents assessed prominent public health issues as a crisis, major problem, minor problem or not a problem.
 - AIDS led with 91% considering it a major problem or crisis.
 - Three-quarters singled out antibiotic-resistant bacterial infections.
 - Roughly half viewed *E. coli* contamination of food, MCD or SARS as a major problem or crisis.

Assessment of Public Health Issues



Demographics

Gender

	Aware Total %
Male	49
Female	51

Age

	Aware Total %
18-34	25
35-44	24
45-54	26
55-64	18
65+	8
MEDIAN	45.3

Education

	Aware Total %
Some HS or less	2
HS grad	18
Some college	39
College grad	23
Some postgrad	7
Postgrad degree	11

Household Income

	Aware Total %
Less than \$40,000	34
\$40,000-\$59,999	21
\$60,000-\$79,999	15
\$80,000-\$99,999	10
\$100,000-\$149,999	8
\$150,000+	2
REFUSE	10
MEDIAN (\$000)	50.3

Demographics (cont.)

Marital Status

	Aware Total %
Single-never married	16
Married	58
Living with partner-- unmarried	9
Separated	2
Divorced	12
Widowed	3

Children Under 18 at Home

	Aware Total %
Yes	40
No	60

Region of Country

	Aware Total %
Northeast	18
Midwest	25
South	34
West	23