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## Changing Societal Demands: Consumerism

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*Anticipating change, rather than simply reacting to it, has become the sine qua non of contemporary business. (Russo & McLaughlin)*

*Know your market cold before you leap. (Marsh)*

Changing societal and consumer demands are being discussed at this consortium in the context of marketing food and agricultural products. As researchers and policymakers concerned with the marketing of food, we agree, I assume, that the production and sale of food and agricultural commodities is a business, not a moral right. I also assume we are interested in knowing the preferences of the customers, not in promoting our own style or ego. The danger of using a business enterprise to promote one's own ego is illustrated by the Pig's Eye story (Marsh).

This is a story about The Minnesota Brewing Co. which opened in St. Paul, MN, in October, 1991. The new owners conducted consumer focus groups to select a brand name and beer style. The advice they received was to call the new beer *Pig's Eye*, make it light and sell it for about \$10 a case. The owners, however, personally preferred a more dignified name, *Landmark*, and a heavier, darker beer that sold for \$15 a case. After one year of *Landmark* the new company was going broke fast. Clearly the majority of beer consumers disagreed with the owners'

preferences and the stuffy, traditional image of *Landmark*. So, swallowing their pride, the brewery owners launched *Pig's Eye Pilsner*, a lighter beer selling for \$9 a case. They also launched a catchy advertising campaign using bikini clad piglets and their sales soared. The new beer had an appealing taste, an acceptable price and a "fun" image. In fact, the image has become so popular that the advertising posters are selling well and there are bids to buy the *Pig's Eye* logo for other products such as clothing.

I offer this story at the beginning of this discussion because I too often observe the brewery owner's original attitude in many agricultural producers. Wedded to tradition, their own taste buds, and out-moded ideas about what is nutritious food and what is a waste product, they are in danger of going broke. They, and we, must anticipate the changes and move in advance or be left with no markets and no business.

The word "consumerism" implies a certain activist behavior or attitude. This is appropriate because consumers are paying more active attention to their food

choices these days and are actively demanding changes in its production, processing, distribution and regulation. They are actively asking questions and making decisions about its connection to their health, its statement about their lifestyle and its impact on the environment around them.

Two questions are addressed in this paper: 1) What has happened to induce this activism among food consumers? 2) What are the implications of the changes in social awareness and food preferences for successful marketing of food and agricultural products? The answers to the first question can be summarized in four categories: demographics, economics and the value of time, information, and the quest for control. The answers to the second question can be summarized in seven categories: value added services, convenience, nutrition education based on avoidance, new definitions of quality and safety, high quality regulation and enforcement, environmental responsibility, and more international trade.

### **Change Inducing Activism**

#### **Demographic Changes**

Much has already been written and said about the changes in demographics and economics of American households over the past twenty years (Kinsey 1992a, 1992b, 1992c; Senauer, Asp, Kinsey). By now most of the patterns are well known, but a few bear emphasis.

When population growth slows, domestic demand for total food also slows. In 1990, the U.S. population of 250 million people was growing at half the rate it was in the middle of the twentieth century

(0.71 percent versus 1.3 percent per year). The good news is that this new rate, projected for next fifty years, is considerably higher than the rate of 0.2 percent forecast only two to three years ago. Now the total population is expected to increase about 50 percent by the year 2050 (to about 383 million) instead of about 15 percent (Harper). The things that have changed since the last major Census Bureau forecast are increased longevity (to 82 years for someone born in 2050), increased immigration and increased fertility, back up to the level of zero population growth (ZPG) with a replacement rate of a little more 2.1 percent. But even though the problem of declining population growth seems to be less than predicted even a year ago, there is no population boom in sight. Food vendors will continue to compete for their share of consumers' stomachs while the number of stomachs will be increasing at a slower pace than we are accustomed to in the United States.

Growth rates in the United States are quite uneven across ethnic groups. Non-Hispanic whites increased at a rate of 0.5 percent in 1990; blacks increased at three times that rate while Hispanics and other races increased six times as fast. By the end of the century, Hispanics will outnumber blacks and each will constitute more than 12 percent of the population (Griffin).

The Immigration Act of 1990 allows more immigrants into the nation than ever before and immigrants are increasingly bringing with them non-European food traditions. By 1986, only 15 percent of new immigrants were Europeans; 41 percent were Asians and 37 percent were Latin Americans. Ethnic diversity is increasing the diversity of the types of foods demanded and supplied. Former

studies have found that ethnic minorities consume fewer traditional fruits and vegetables, less milk, beef and desserts (Senauer, Asp and Kinsey, pp. 74-76).

Ethnic diversity also creates market niches than can be profitable for astute marketers. For example, one group of Hispanics in New York City proved to be a niche market for extra-high-fat milk (Senauer, Asp & Kinsey, pp. 75-76). Reportedly Quaker Oats has adopted a strategy of marketing to ethnic groups as part of its mainstream activity. With half of the company's corn products being sold to ethnic minorities, one Quaker vice president was quoted as saying, "We want ethnic marketing deeply embedded in every business manager in this company" (Wynter).

Household composition is the foundation of demographic trends. Its major components are household size, age distribution and marital status. The general trend in American households has been toward smaller, older households with fewer married couples and fewer children. Married couples declined to 80 percent of families and 58 percent of households by 1987. The rate of growth in married couples with children has declined so they make up less than 27 percent of households while the rate of growth in single person or single household head rose between 3.5 percent and 6.3 percent (Senauer, Asp & Kinsey, p. 87). More than half of all households have only one or two people living in them.

Ethnic diversity seems to be reversing the non-family trend somewhat as it is noted that in 1990 in California, 83 percent of Hispanic households were families versus 64 percent of households of non-

Hispanic whites (*Wall Street Journal*). Minorities are more likely to be younger and in their child bearing years which is one reason they tend to form families at a faster pace. Overall, however, the percent of households that looked like the traditional stereotype – married couple with two or more children under age 18 and a wife not in the labor force – dropped from 23 percent in 1955 to about 6 percent today.

Smaller households spend more per capita on food, eat more food away from home, purchase smaller portions and more conveniences. Small households are no longer dominated by the young and the old since people are staying single longer, divorcing more and not remarrying, and living a wider variety of lifestyles than in past decades. Baby boomers are ages 29 through 47 in 1993; they will swell the ranks of older middle-age households (ages 46 through 63) until 2010 when they will begin to swell the ranks of the retired population. The nation's median age was 32 in 1990; it will be more than 40 by 2030.

Increased life expectancies over the century have created a growing population of elderly people. Fifty percent are expected to live to age 80 by 2000. Age affects food consumption because caloric needs decline and nutritional needs change as people age. The elderly are known to eat less than the average amount of red meat and milk. They are also more likely to be concerned about eating too much fat, cholesterol and salt than younger people. New ways to design, package and deliver food to the oldest citizens will become a challenge for marketers and caregivers alike.

## Micro and Macro Economic Effects

The micro economy of households and the macro economy of the nation have both led to increased labor force participation of women and children. This has diminished the amount of time for household and recreational activities which has driven the value of this time to an all time high. Simultaneously, the distribution of jobs, income and wealth has grown less equal. There is a popular perception that real household incomes in the United States are not growing, that the rich are getting richer and the poor are getting poorer; that the large middle class mass market is diminishing, and that an underclass of permanently unemployable persons has developed. Considerable evidence supports this perception. Aggregate income statistics, such as per capita personal disposable income, median family income and individual wage earnings, reveal much the same picture – rising incomes until about 1973, and basically stagnation thereafter. In terms of income distribution, the percent of all U.S. income going to the richest 20 percent of households has increased to more than 47 percent. More families are entering both the low and high income brackets, that is, those below \$10,000 and more than \$50,000 per year.

The greatest change in the labor force over the past two decades has been an increase in the percent of married women working outside the home. The labor force participation rates of men and women are converging. The percent of full-time workers who were women increased to 39 percent in the last decade. Seventy percent of married couples, with both spouses college educated, were dual earner households in 1988. Almost 70 percent of married

women in prime childbearing years (ages 20 to 44) are in the labor force now. This is a change from past decades and it is time we consider it a permanent part of our lifestyle.

In addition to their primary wage earning job away from home, almost 6 percent of men and almost 5 percent of women report holding multiple jobs, spending an average of thirteen hours a week on a second job in 1985. Men still report working more total hours in the labor force with the ratio of women's to men's hours being about .68.

If we add the "second shift," that is household production time, to labor force time, it brings the ratio of women's to men's total hours worked closer to .90. There are conflicting stories about how pressed for time and how much leisure time people have. It is another indication of the diversity of lifestyles among American consumers. Those who are working have recently been found to be spending more hours than ever at work. Married couples with children and at least two wage earning jobs have less leisure than ever, but, when everything is considered, consumers' leisure time is increasing because more people are single a larger part of their lives, they have fewer children and men are retiring earlier. Single, child-free or retired people have the most leisure time and their numbers are increasing. The gain in women's leisure also comes, in part, from shifting a measurable amount of early child care to fathers.

The importance of this change in time allocation is that capital and purchased services are being substituted for household labor time. One of the primary ways of

cutting down on household time is to spend less time in the kitchen. Microwave ovens help; convenience foods help and so does TOTE (take out to eat) food, fast food and home delivered food. Since 86 percent of employed women still do most of the cooking and 91 percent do most of the shopping, they look for ways to feed themselves and their families quickly. Most spend less than one half hour preparing an evening meal; 20 percent spend less than fifteen minutes. This represents a classic substitution of capital for labor in household production in the face of rising implicit or real wage rates. It suggests that the demand for value-added food products is not about to end.

The macroeconomic effects on household labor force participation are being felt through slower growth in employment and widespread permanent layoffs among middle managers as well as manufacturing workers. This is part of a restructuring of all segments of our economy which has resulted in notable increases in overall productivity, but at the expense of unemployment. Besides decreasing household income this increases uncertainty and consumers' expectations about future well-being. The net result in the short run, before massive retraining and employment, is to lower household expenditures on all goods, especially on luxuries. Food, however, is often treated as a "mini luxury." That is, food is an affordable indulgence when large ticket items are outside the household's budget. This phenomenon helps to explain why some products sell well even in a recession. With slow growth in the overall economy, however, it will feel like we are close to a recession while we are in a state of slow, steady growth.

## New Information

An explosion of scientific information about food and its relationship to short-term vitality and long-term health and to the health of the environment is continuing to alter the way we eat and how we think about food. New information about diet and health has been fostered by a veritable flood of research reports documenting the potential connections. These reports were stimulated by the 1977 U.S. Senate Select Committee on Nutrition and Human Needs, which defined a set of Dietary Goals for the United States. The various guidelines established by organizations such as the National Research Council and the American Heart Association and, finally, by the United States Department of Agriculture (USDA) all recommend a reduced consumption of fat, generally to 30 percent or less of total calories, with saturated fat less than 10 percent of calories. Most recommend that cholesterol consumption should be reduced, usually to 300 mg/day or less. The consumption of complex carbohydrates found in fruits, vegetables and whole grains, should be increased generally to 50 percent or more of total calories. After fats and oils, which provide almost half of the fat to our diets, those foods that provide the most fat are meats and fish (31 percent). Meat and eggs provide almost all of the cholesterol (82 percent). Perhaps this helps explain why USDA, whose constituency includes farmers and ranchers who produce animal products, took so long to get on board with other government agencies in the modern nutrition education business. Fourteen years after the 1977 Dietary Goals were proposed, they produced the famous Food Guide Pyramid. They were more quickly persuaded to agree with FDA proposals for new food labels (Gitfeld). Turf fights

among bureaucracies are common, but I suggest that USDA does neither consumers, producers nor themselves any favors by stonewalling new information and useful labeling.

New food labeling laws, still being implemented, promise to provide even more information about the nutrient content of foods and to reveal the relative quantities of nutrients that might be linked to diseases of the heart or cancer. The new label will make it considerably easier to compare calories per serving since the serving size is standardized. Information about total and saturated fat, cholesterol, sodium, sugar and fiber content should be clear. Gone are all but four of the vitamins and minerals; they are no longer nutrients of grave concern in the American diet. Note that the old nutrition labels focused on providing information that would allow consumers to eat enough of the essential nutrients. The new labels focus on information that will allow consumers to avoid too much of potentially harmful nutrients. That says a lot about the overall state of nutrition of the American people and about the new status of food in our lives.

The importance of these new labels lies, not only in the information they will transmit to individual consumers who read them, but in the accountability of processors who must test for and then consistently meet the standards as labeled. As Padberg pointed out several years ago, this non-use benefit of food labels is a positive externality that increases the general nutritional quality of food and increases consumers' confidence in the food industry and in government's ability to regulate in their best interests.

Although some consumers send conflicting messages about their food and health concerns, in general, modern diets seem to be moving in the direction of the new dietary recommendations. Americans now consume about 36 percent of their calories in the form of fat, down from 41 percent in 1977-1978, but up from 32 percent in 1910. About one third of Americans generally report they are trying to limit the calories they eat while almost two-thirds are considered to be overweight. Between one-third and one-half of surveyed adults say they try to avoid eating too much fat and cholesterol. Collectively, these changes in attitudes about diet and health alter the types of foods demanded in the market (Kinsey 1992c).

It is important to point out that the impact of all this new information about diet and health and disease has been greater because it came to a population that was well fed, had numerous food choices and was hungry, not for food, but for control over their lives.

## Control

A change in the human condition (psychoses) of consumers has been linked to a national malaise. Samuelson and Heilbroner both argue that after World War II Americans began to lose the traditional sense of self-control and self-destiny that dominated the eras of western expansion and industrialization. They began to realize they needed to rely on big institutions and big government to insure individual rights. But in the face of social problems like drugs and crime and poverty, faith in these social institutions was also shaken and they began to turn inward for self-gratification. Armed with new information, spending power and choices, they

began to take control of their destinies in one of the only ways they could, through their diet and exercise behavior. The point should not be overdrawn, but the increased demand for foods low in fat and salt and high in fiber, for lean meat, unsweetened drinks and lite beer can all be attributed, in part, to consumers' belief that the way they eat will affect the way they feel and look and how long they live. To the extent that experience proves them correct, this is a trend that promises to be long lived. The specifics may change. For example, we may one day learn that dietary cholesterol is unrelated to blood level cholesterol in an individual. We may be able to immunize against cancer. But the principle will still hold. If there is some known connection between dietary intake and life's vitality, consumers' eating patterns will evolve in that direction (Kinsey 1992a).

## Impacts on Food Markets

### Value Added

There will be a continuation of more and more value added to raw food commodities. The *how*, *who* and *where* of transforming raw agricultural commodities into edible food has changed dramatically and permanently. In an increasingly consumer-driven food market, the emphasis is on marketing to consumers who no longer want food to cook, but meals to eat.

The lion's share of the economic activity in the food system has been shifting toward the retail end of the food chain. More than \$520 billion of value was added to the domestic economy by the food marketing industry, including eating establishments, in 1991. This was more than five times the value added by farming

in 1991 compared to less than three times the value added by farming twenty years ago. Almost two-fifths of the value added was at the retail end of the market (Gallo).

In spite of the increase in value added to food, the percent of income spent on food has steadily declined in the United States to about 13 percent on average (7.8 percent for food at home and 5.7 percent for food away from home). The proportion of total food expenditures, which average about \$1,652 per person per year, that went for food away from home reached 42 percent or \$956 (\$18/week) in 1990 (U.S. Department of Labor). This is testimony to the productivity of the food industry and to the demand for convenience by consumers.

We traditionally think of value being added after the farm gate, but pre-production scientific technology is increasingly used to change the form and definition and value of food to the ultimate consumer. Breeding and genetic research are obvious examples but so is the development of fat substitutes such as AU Lean and Oatrim. The former was developed at Auburn University and is now being used by McDonald's in its McLean Delux sandwich and in all Disney theme parks and in some grocery chains. Oatrim is used by Con-Agra in its Healthy Choice brand of ground beef.

The quest for lower fat foods has elicited several fat substitutes from public and private laboratories. It is an example of a new definition of "value added." A food product becomes more desirable because of some very basic research that allows the characteristics of the raw commodities to be altered. In the future we will be adding value through genetic en-

gineering, biotechnology and new processing technologies as well as through cooking, serving and delivery services.

### Convenience

A demand for convenience, not only in product procurement and preparation, but in information processing, is driven by the high values of time in our society. Outside of the demand for high-quality, healthy and safe food, it is probably the single biggest force driving food selection.

Examples of convenience-driven food products and services abound. They range from the vast increase in TOTE food sold in deli's and convenience stores, to home delivered food, frozen entrees, microwaveable dishes, fresh fruits and fresh bakery goods. A study of grocery store executives conducted by Russo and McLaughlin reports expectations that relatively convenient and/or healthy foods will increase as a portion of the total market basket by 2000. They predict a decline in the relative proportions of meat, dairy products and dry groceries with an increase in fresh produce. Also, expected increases in deli, bakery goods, seafood and frozen foods are consistent with the trend toward convenience. Looking at those food products that experienced the biggest increases in sales in the last year, meat sauces and marinades lead the pack with a 193 percent increase. This indicates, not only a demand for convenience, but for spicier flavors. Other big increases were seen in refrigerated salads, slaws and pizzas, toaster pastries, graham crackers and rice cakes (Deveny). In-store bakeries are popular and big food companies such as Pillsbury are also test marketing single serving sizes of refrigerated bakery goods (Kennedy).

### New Definitions: Nutrition, Quality, Safety

As discussed above, consumers are willing to pay more for higher quality, better taste and variety. There are roughly 30,000 items in a grocery store and 13,000 new items were introduced in 1990, increasing the variety at a dizzying pace. The search for new items to fill new niches and serve new needs goes on. Designing foods to meet consumers' safety and quality expectations is a continuous process. Safety will have to be assured. We know from other studies that novices and experts alike perceive those activities or products (ingredients) that are most familiar, consumed most often and voluntarily, and bring large benefits to be the least risky (Slovic). Many of the new processes being adopted in food and agriculture carry a high degree of uncertainty and are associated with dread consequences (cancer) and will be consumed involuntarily by consumers. Such processes as irradiation, biotechnology, genetic engineering and new chemicals will have to be explained carefully and thoroughly if they are to be accepted in the marketplace.

The technology of production and manufacturing of food will continue to change. For example, I expect that in our lifetime commercial fishing will become obsolete as a way to produce fish for the commercial market. Fish caught in the wild are being depleted because of over fishing, they are more polluted and more expensive and have less consistent quality and taste than farmed fish (Kummer). Aquaculture now provides about 13 percent of the world's fish (Brown, Flavin and Kane, p. 30). The technology is not yet perfected, but aquaculture that is located throughout the world, close to the consumers who want a consistent and reliable

supply of fresh fish, will be more efficient, safer for the both producers and the consumers and it will continue to grow.

Fresh produce, fish and meats will be branded by chain store private labels or national brands. This is consistent with the demand for quality assurances. With an increase in the value of time and a proliferation of products, consumers are willing to pay for assurances such as private brand labels and better public regulation. As the value of time increases, the costs of seeking information increases as does the cost of becoming ill from food born pathogens or life threatening food characteristics. Therefore, consumers will demand that government regulators do a better job of protecting them from unsafe food and guaranteeing them better and more accurate information about the characteristics of the food they eat. In other words, they will delegate some of the information gathering tasks (search costs) to a third party and willingly pay for it (Kinsey 1992b).

### Environmentalism

Consumers are increasingly turning green. That means they are concerned about the effect on the environment of their own and others' consumption choices. Given a choice of recyclable, biodegradable, or nonpolluting products, *that still serve their own private consumption needs*, they are increasingly likely to choose a product that also makes them feel like a good citizen. This is driven less by altruism than by a realization that all private consumption has a common property aspect to it. The food I choose can be a public good or bad in the sense that it affects the utility of other people who have no control over my behavior. Some of

those people will live in the future, some of them live far away, but the quality of their air and water and life is affected by my choice of consumables and my production technology.

The conscious interdependence among consumers around the globe and the need to adopt both consumption and production technology that will help recoup and save the environment represents one of the criteria for the sustainability of agriculture and its markets. This means food production and processing firms will need to adopt environmentally friendly technologies. It means the transporting and packaging of foods will need to be compatible with this goal. It means the *net* value added to final food products must include an accounting for environmental costs, from air and water pollution, energy used and heat and garbage created to recycling considerations. The value added must exceed the value of resources used if the food product and its preparation technology are to be sustainable. It is probably the second biggest challenge facing the food and agricultural industry after learning to survive in a slow-growing economy (Kinsey 1992a).

### International Trade

The last category is the impact of domestic consumer trends on international trade. With slow growth in the domestic market, estimated at 8 percent by the year 2000 (*Kiplinger Washington Letter*), and excess capacity and production in the food and agricultural sector, the only place to increase total sales is in foreign markets.

The North American Free Trade Agreement (NAFTA) is one outcome of this quest. Developing markets in less

developed countries, like Mexico, promise to expand the demand for U.S.-produced food since their population is growing much faster than ours and, with their relatively low but rising incomes, their demand for food will increase even faster than the population increases might dictate (Schuh).

Many wonder if we can produce food cheaply enough to sell it in a developing country with low wages. We must not confuse low wages with low costs of production. Production in the U.S., with its large complement of financial and human capital, is quite competitive. In fact, productivity is increasing at almost 3 percent per year now, albeit with a tradeoff of higher unemployment.

The exports of high value food products increased 80 percent (to 42 percent of agricultural trade) since 1983 while the export of bulk products decreased 4 percent (to one-third of agricultural trade). The fastest growing exports are in pet foods, snack foods, beer and wine. Our best foreign markets are in East Asia and are growing in Latin America (*Kiplinger Agricultural Letter*).

While seeking international markets for domestic producers and processors, international trade negotiations are becoming more difficult as tariffs decline and nontariff barriers (measures) are erected. Many of the new nontariff measures center around health and safety issues, broadly defined. Some are directly related to food safety like fresh and non-decaying fish and meat. Others are related to the long-run viability of our global environment and species like preserving the dolphins while catching tuna fish. Some are clearly designed to protect a

domestic industry like a ban on hormones in meat processing in the European Community and others serve more "universal" goals like preventing the spread of foot and mouth disease or AIDS. Nontariff measures used to promote environmental and moral causes, quite unrelated to the economic value of products and trade, are a sea of quicksand that we are only beginning to traverse.

## Conclusions

In an information society in which consumers are reasonably well educated and affluent, they will be more exacting in their demands and less forgiving of other's mistakes or misleading statements. With regard to food safety, they will assess the risks according to the information they have and balance it against their preferences for taste and convenience. They will expect good performance and service from the private market and from their public servants and they will be willing to pay for it.

The domestic market for food will grow slowly in the aggregate. Animal products will probably decrease on a per capita basis while cereal, fruits and vegetables will increase. Competition for shelf space and consumers' attention will be fierce and will be controlled largely by the retailers who will have access to huge quantities of data on what types of products are purchased by what types of consumers. Higher and higher valued products will sell better and better as consumers seek the best tasting, lowest calorie, most nutritional, and most convenient foods. Key marketing concepts will be integrity, quality, taste, fast, fresh, safe and easy.

Some will ask if a lot of these observations are not just fads and if those interested in long-run profits should just ignore them since next month another new concern or demand will come along. It is indeed difficult to differentiate between fads, cyclical episodes and long-term trends, but there are some helpful clues. Those changes in food consumption that ride the demographic waves are likely to endure. Those that become both technically and economically viable for producers and consumers and are consistent with the general public interest such as good health and environmental quality will endure. Production and consumption technologies that do not use up more resources or energy than they replace will likely endure (Kinsey 1992a). And those products that add more value and pleasure to peoples' lives than they take away will endure.

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