Why Consumer Prefer Chicken
Consumer Survey Results 2010

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Givaudan Flavors

Chicken Marketing Seminar 2010

Monday, July 19, 2010
Amelia Island, Florida

Purpose of Survey to Determine...

- Frequency and market penetration of eating chicken at-home, away-from-home, and combined.
- Frequency of eating chicken by light, medium, and heavy consumers of chicken.
- Consumers preference for chicken relative to versatility, convenience, healthfulness, economic value, leanness, taste, tenderness, and quality/wholesomeness.

Survey Basics

- Survey was conducted by PKS Research Partners
- 1,056 household from pre-screened panel contacted on-line June 4, 5, and 6.
- Respondents 18 years of age and older
- 52 % females, weighted
- 48 % males, weighted

Survey Basics

Regional Distribution of Respondents (weighted):

Region	Percent
New England	3.5
Mid Atlantic	15.2
East North Central	15.1
West North Central	6.6
South Atlantic	20.7
East South Central	4.7
West South Central	10.6
Mountain	6.7
Pacific	15.8
Total	100

Survey Basics

Race of Respondents (weighted)

Race	Percent
White (non-Hispanic)	69.0
Hispanic	13.5
Black (non-Hispanic)	11.4
Other	6.1
Total	100

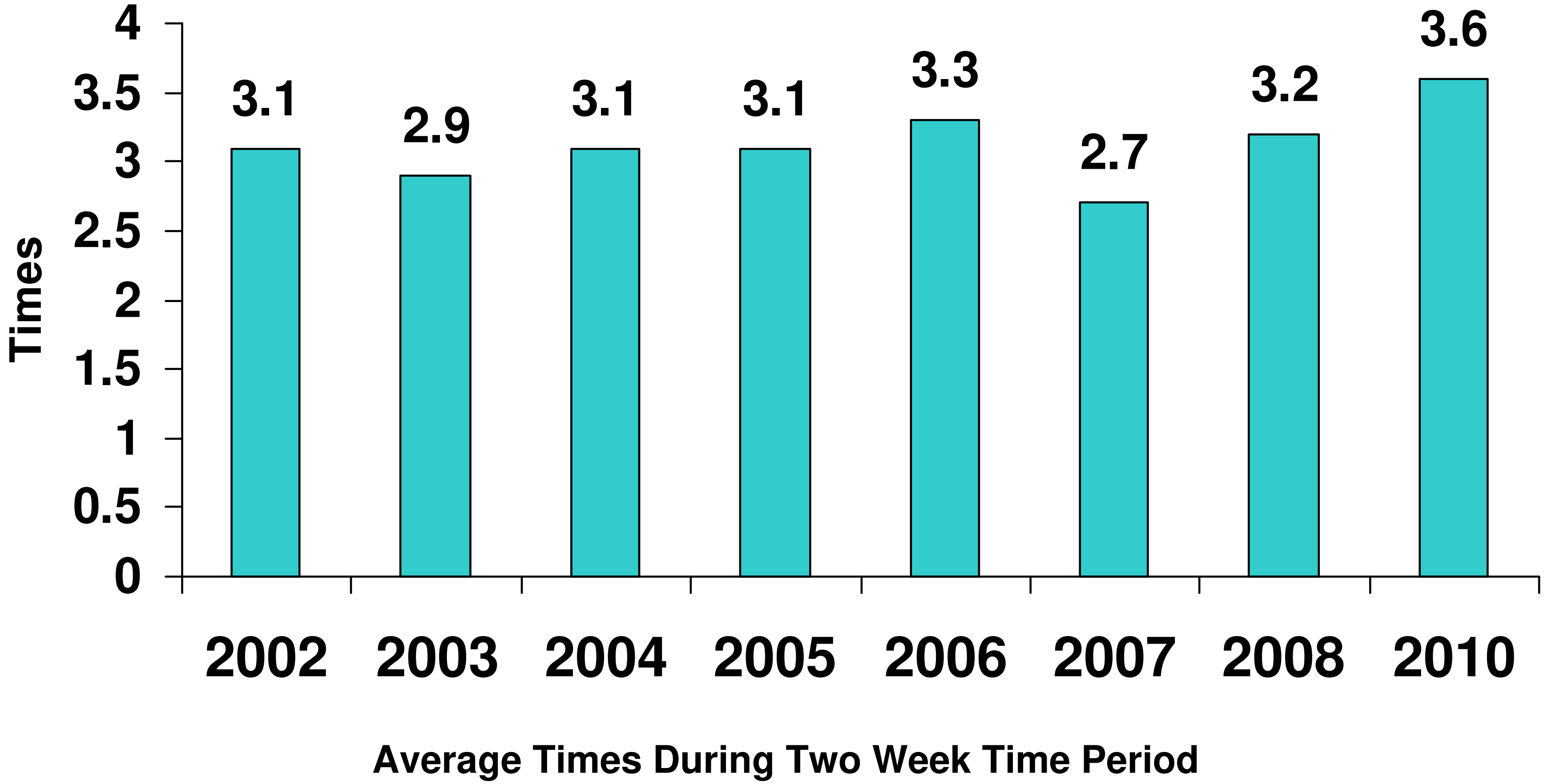
Question 1

- **Thinking about the meals and snacks you've eaten in the past two weeks, how many times did you eat chicken that was purchased from a supermarket or other retail grocery store? (Fresh, frozen, or prepared chicken are included in the responses.)**

Question 2

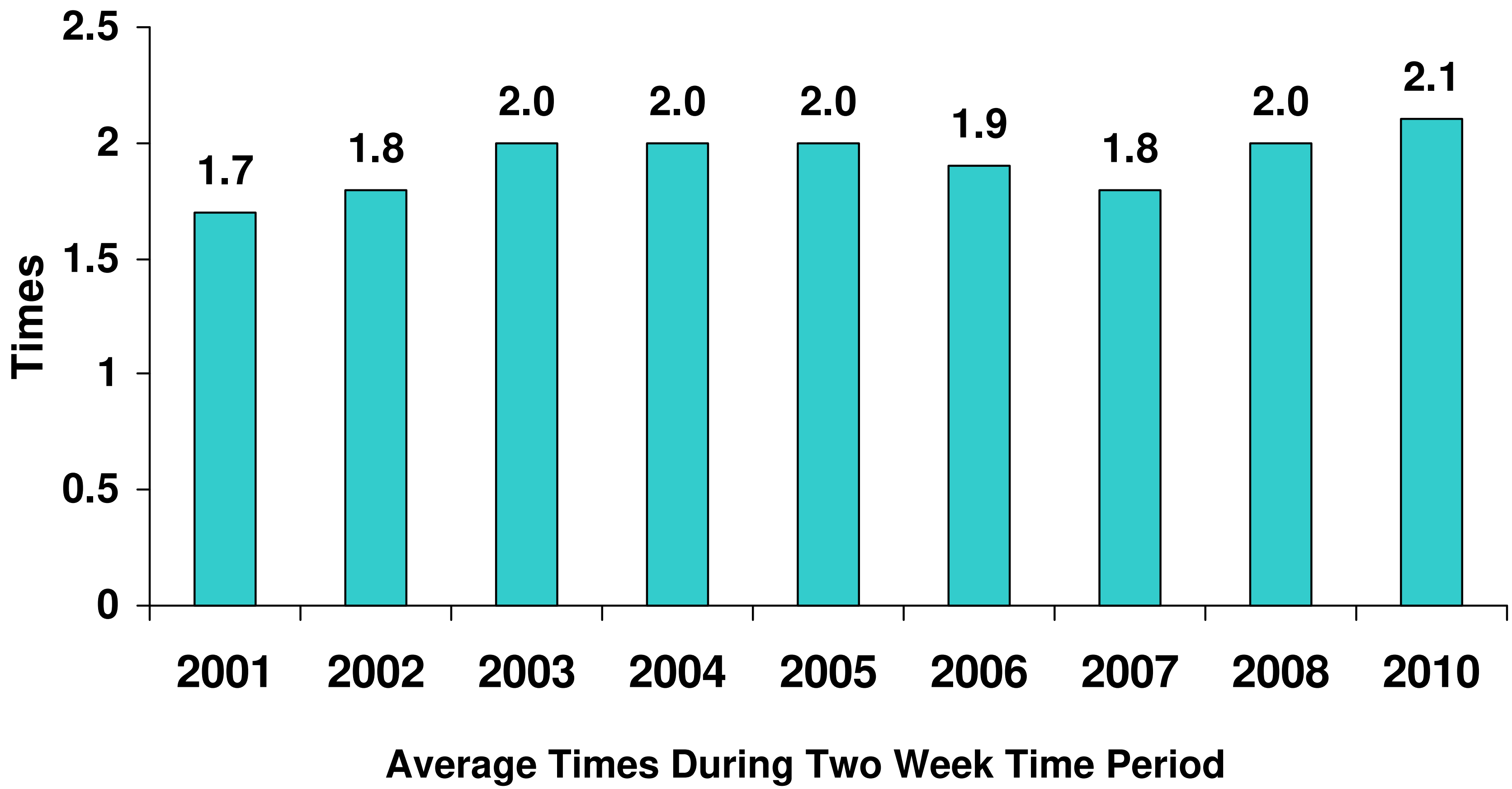
- **Thinking about the meals and snacks you've eaten in the past two weeks, how many times did you eat chicken that was purchased at a restaurant, fast food store, carryout shop or employee cafeteria? (Prepared meals of chicken, chicken products/sandwiches, and similar foodservice chicken items are included in the responses.)**

Frequency of Eating Chicken Purchased From Retail Grocery



Note: Frequency includes all respondents whether they ate chicken or not during the two week time period.

Frequency of Eating Chicken Purchased From Foodservice



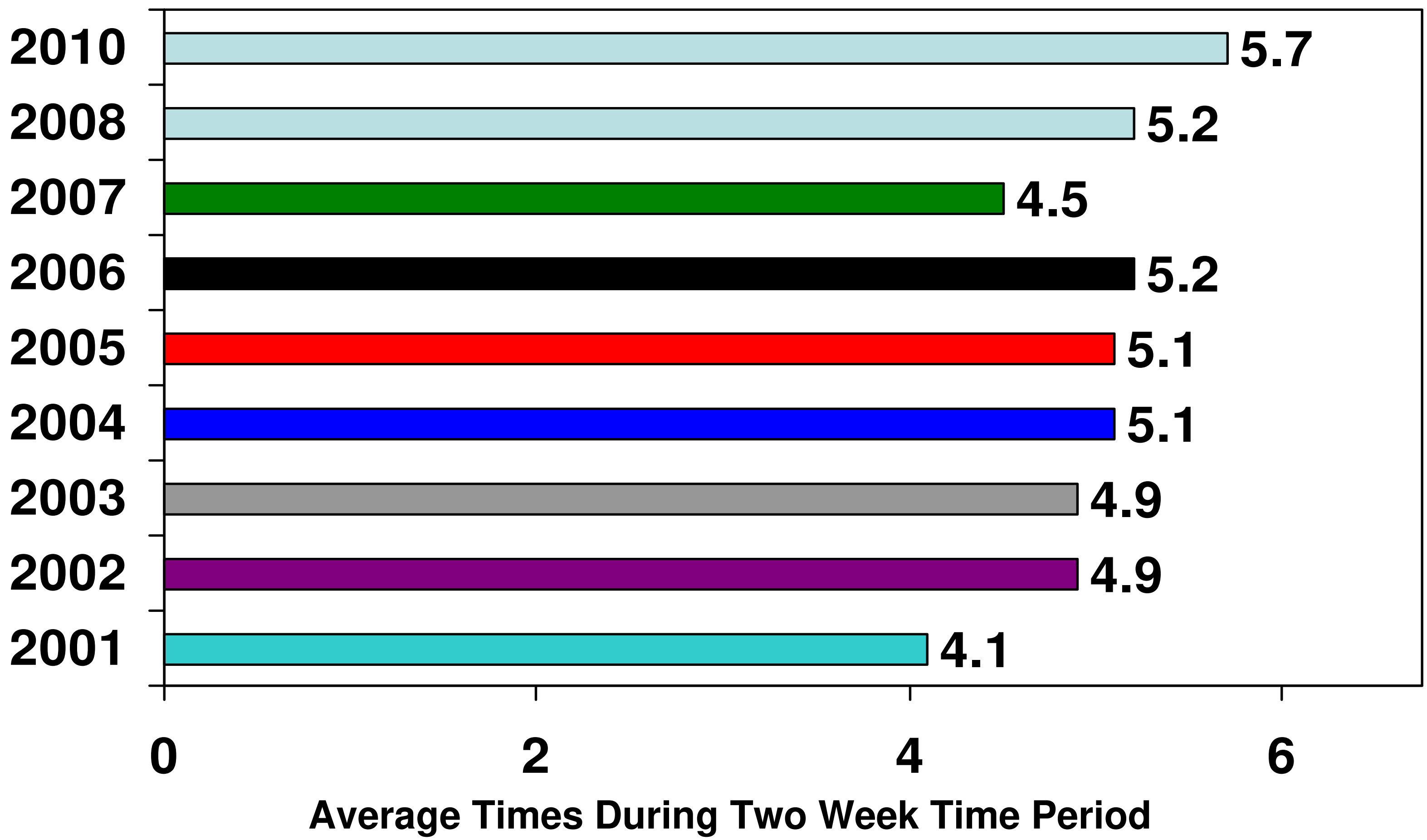
Note: Frequency includes all respondents whether they ate chicken or not during the two week time period.

Combined Frequency of Eating Chicken

	2001	2002	2003	2004	2005	2006	2007	2008	2010
	--------------------------- average times in two weeks								*------------------------*
Supermarket Grocery Store	2.4	3.1	2.9	3.1	3.1	3.3	2.7	3.2	3.6
Restaurant Foodservice	1.7	1.8	2.0	2.0	2.0	1.9	1.8	2.0	2.1
Total	4.1	4.9	4.9	5.1	5.1	5.2	4.5	5.2	5.7

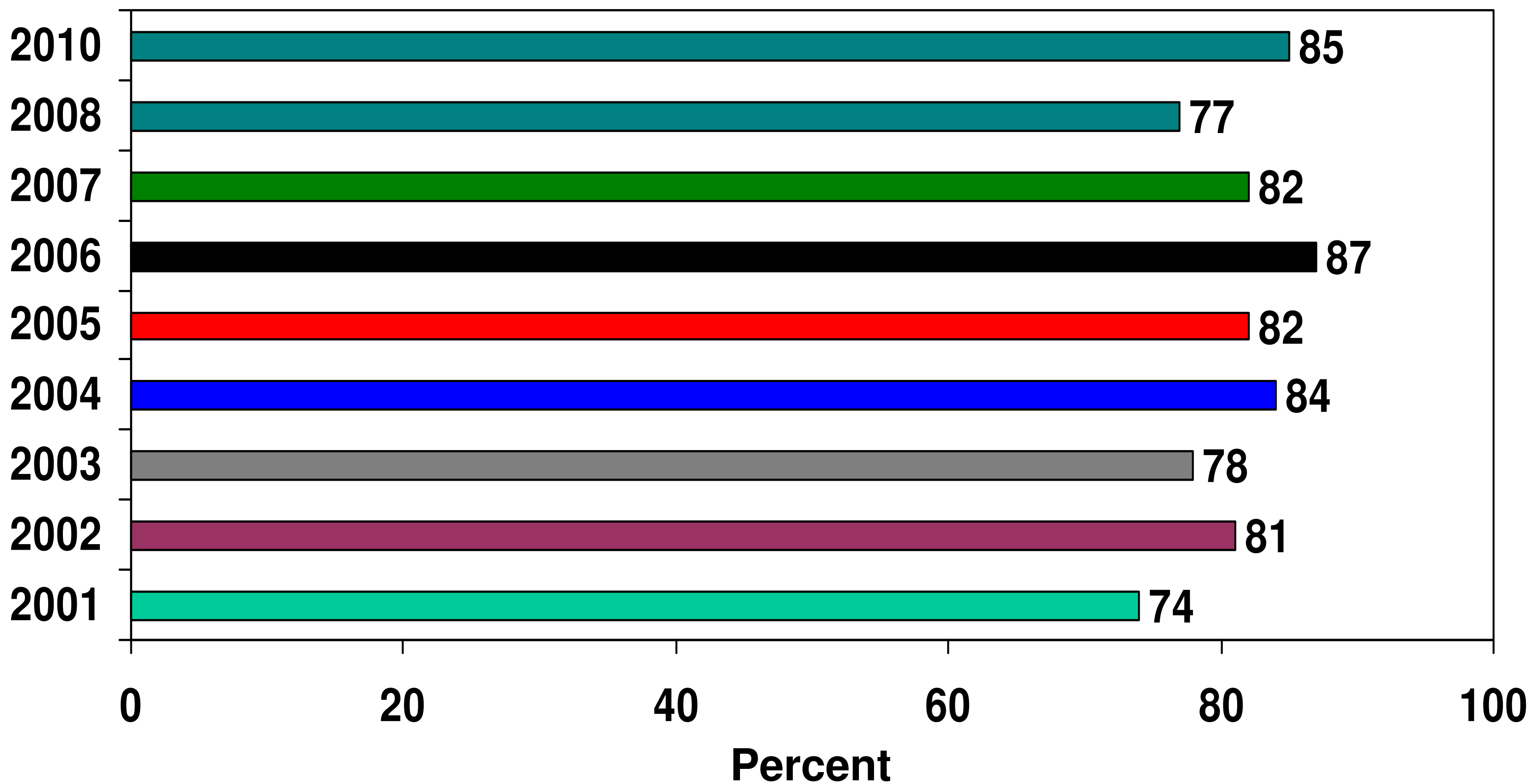
Note: Frequency includes all respondents whether they ate chicken or not during the two week time period.

Combined Frequency of Eating Chicken Purchased From Retail Grocery and Foodservice

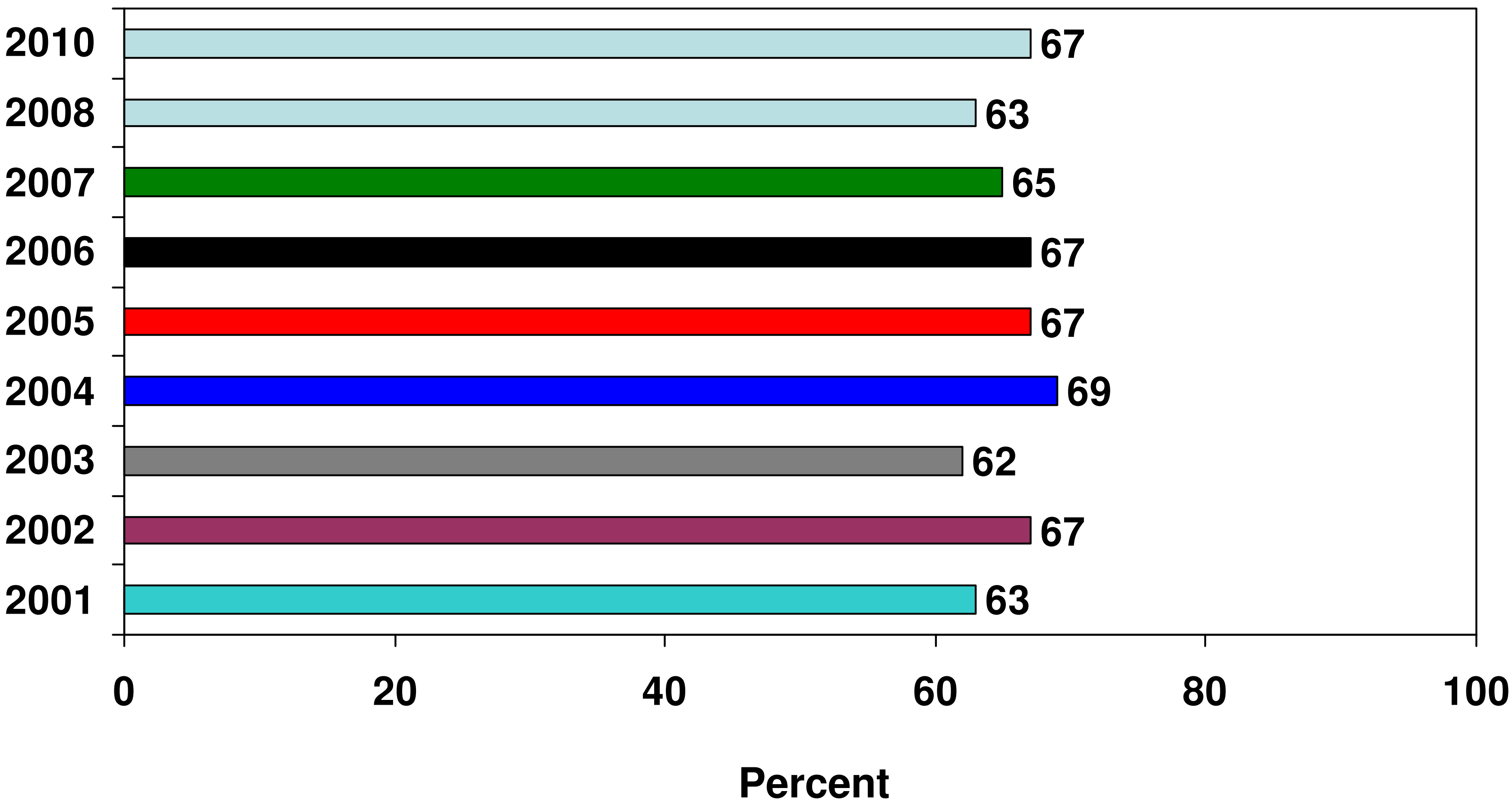


Note: Combined frequency includes all respondents whether they ate chicken or not during two week time period.

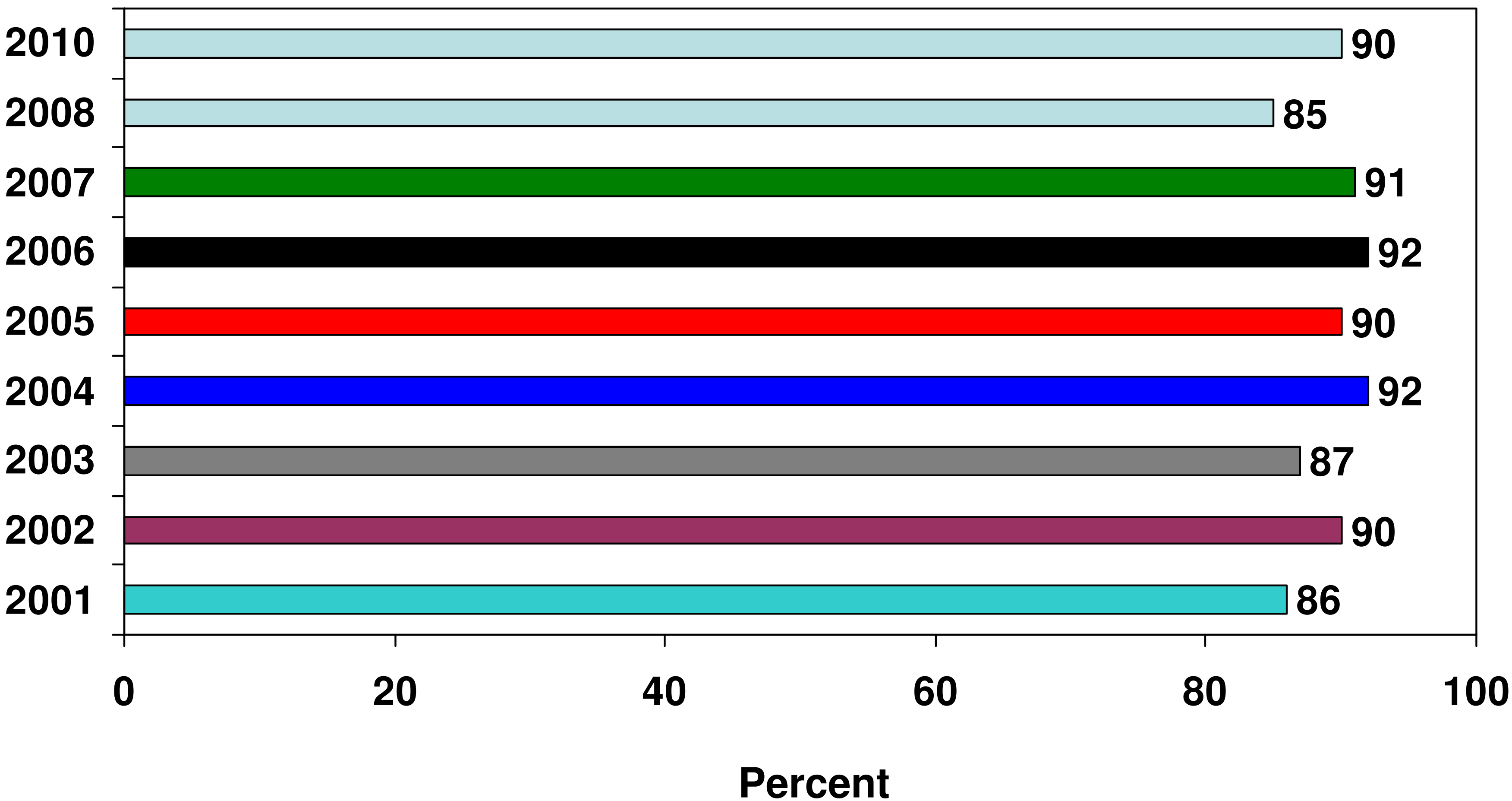
Share of Consumers Eating Chicken Purchased From Retail Grocery During Two Week Time Period



Share of Consumers Eating Chicken Purchased From Foodservice During Two Week Time Period



Share of Consumers Eating Chicken Purchased From Retail Grocery and Foodservice (combined) During Two Week Time Period



Frequency of Eating Chicken by Generational Group During Two Week Time Period, 2010

	Generation				
	Millennial 18-34	Generation X 35-44	Boomers 45-64	Greatest Generation 65+	All Respondents
	----------------------------------Times--				
(A) Chicken Purchased at Retail Grocery	4.6	3.6	3.2	2.6	3.6
(B) Chicken Purchased at Foodservice	3.1	2.2	1.6	1.1	2.1
Combined A & B	7.7	5.8	4.8	3.7	5.7

Share of Generational Group Eating Chicken During Two Week Time Period, 2010

	Generation				
	Millennial 18-34	Generation X 35-44	Boomers 45-64	Greatest Generation 65+	All Respondents
	-----------------------------------Percent-----------------------------------				
(A) Chicken Purchased at Retail Grocery	90	86	83	79	85
(B) Chicken Purchased at Foodservice	80	71	61	50	67
Combined A & B	92	91	88	88	90

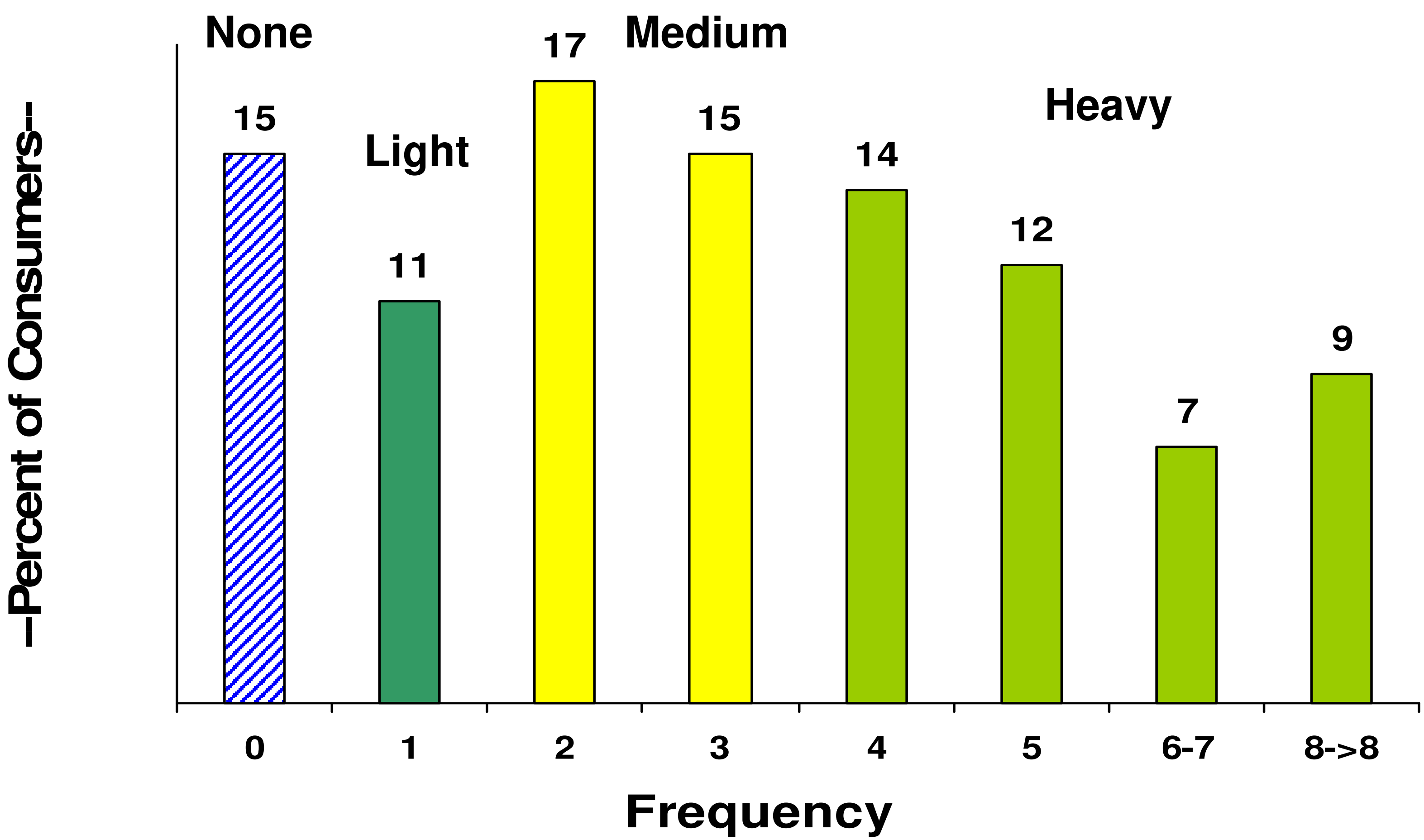
Frequency of Eating Chicken by Demographic Group During Two Week Time Period, 2010

	Demographic Group				
	Any Hispanic	Black Only (Non-Hispanic)	White Only (Non-Hispanic)	All Others	All Respondents
	------------------------------------Times------------------------------------				
(A) Chicken Purchased at Retail Grocery	4.0	4.1	3.4	3.8	3.6
(B) Chicken Purchased at Foodservice	2.9	2.2	1.8	3.1	2.1
Combined A & B	6.9	6.3	5.2	6.9	5.7

Share of Demographic Group Eating Chicken During Two Week Time Period, 2010

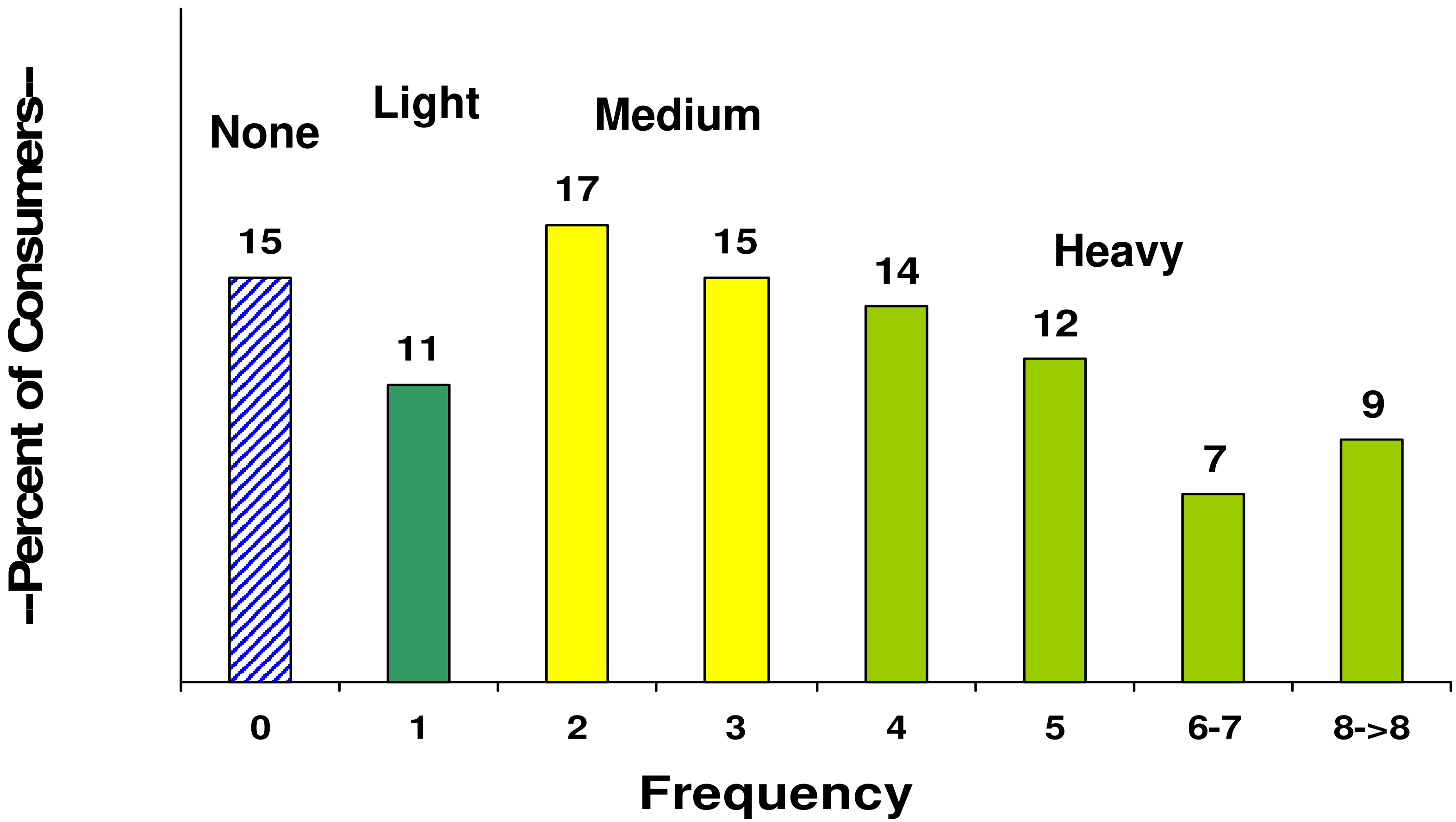
	Demographic Group				
	Any Hispanic	Black Only (Non-Hispanic)	White Only (Non-Hispanic)	All Others	All Respondents
	-----------------------------------	Percent	-----------------------------------		
(A) Chicken Purchased at Retail Grocery	90	89	83	91	85
(B) Chicken Purchased at Foodservice	79	76	62	80	67
Combined A & B	92	92	89	91	90

Frequency of Eating Chicken Purchased at Supermarket/Retail Grocery (Times During Past Two Weeks/2010)



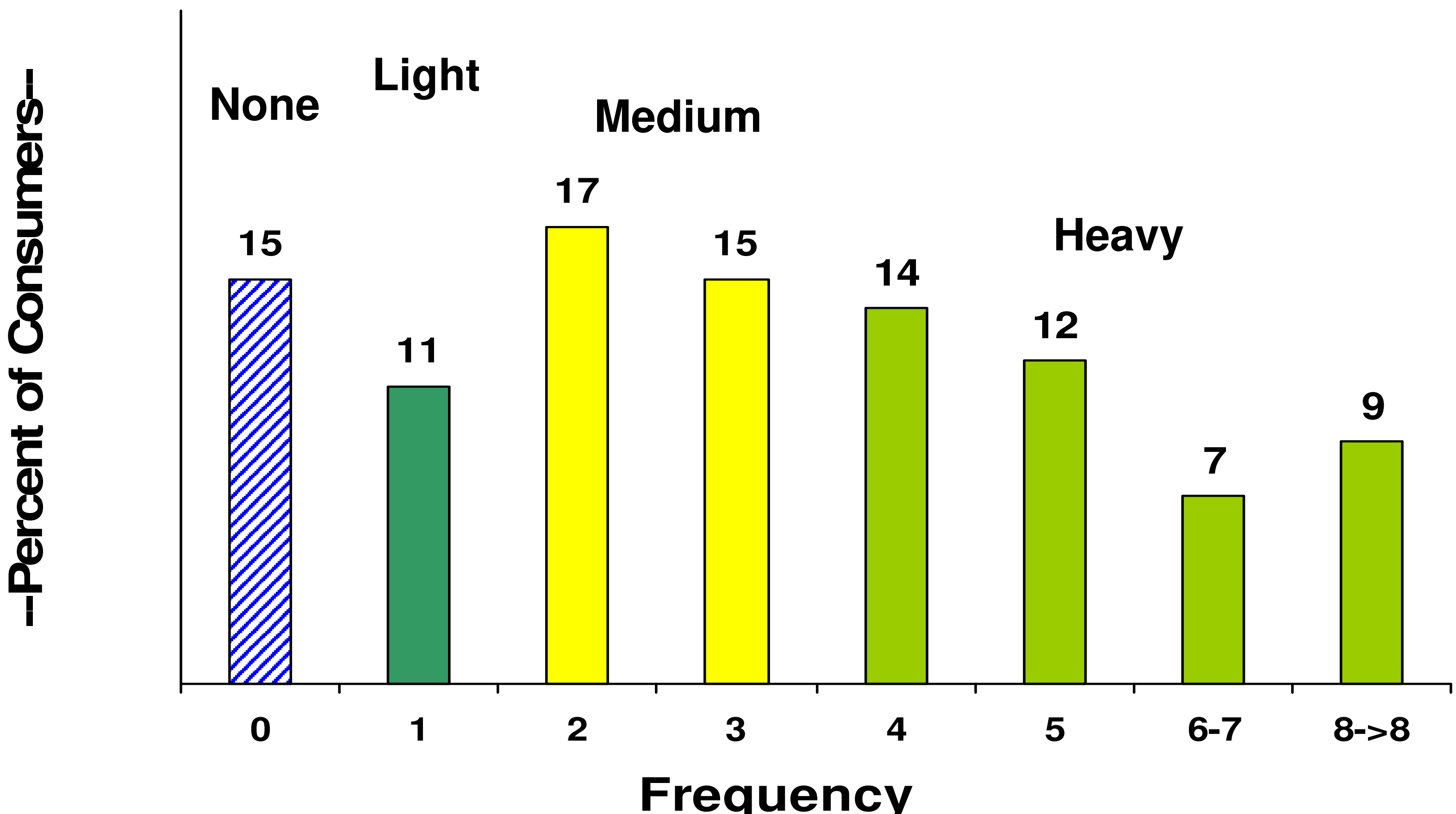
Average times including none: 3.6
Average times excluding none: 4.2

Frequency of Eating Chicken Purchased at Supermarket/Retail Grocery (Times During Past Two Weeks/2010)



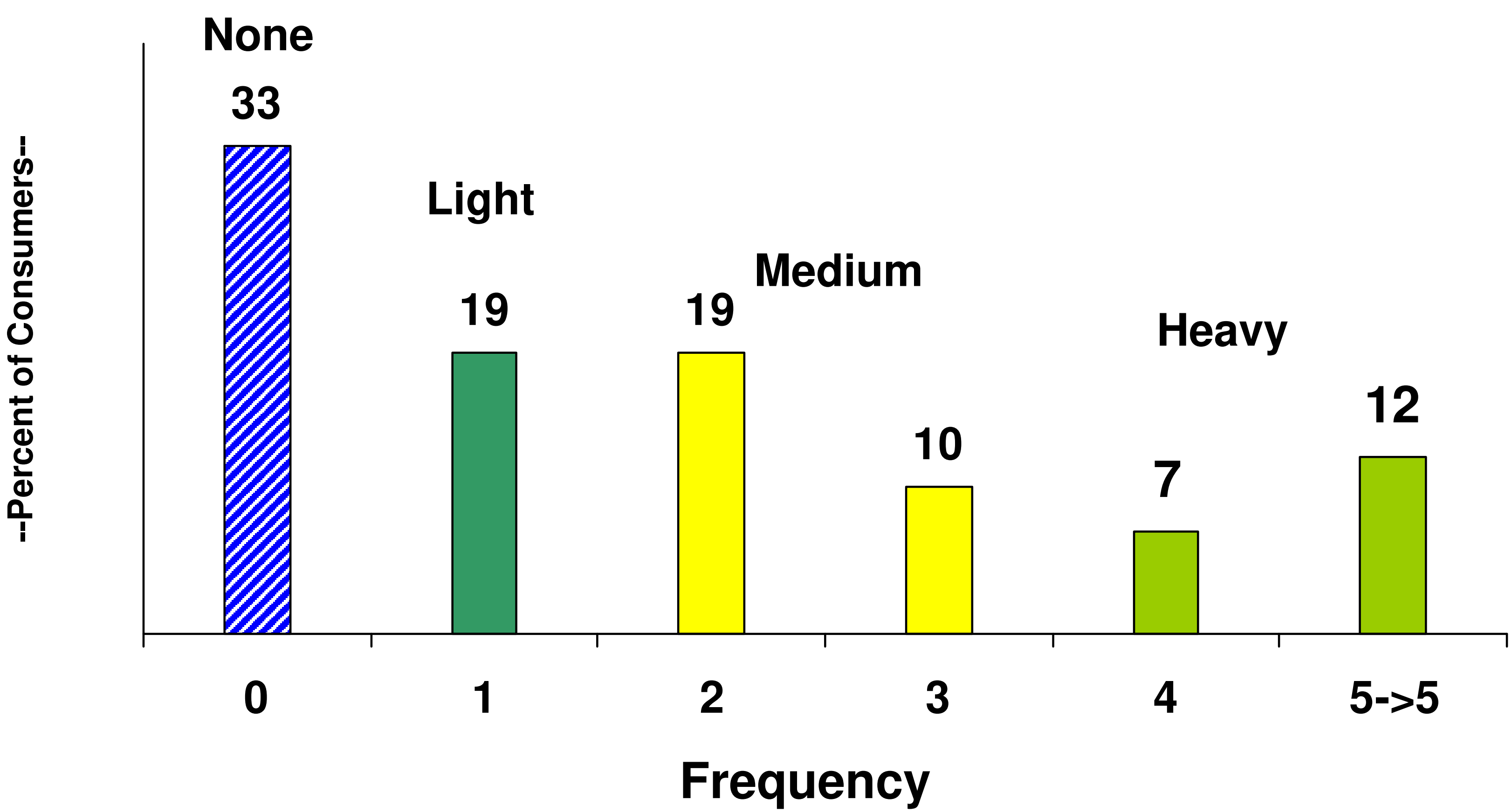
Average times including none: 3.6
Average times excluding none: 4.2

Frequency of Eating Chicken Purchased at Supermarket/Retail Grocery (Times During Past Two Weeks/2010)



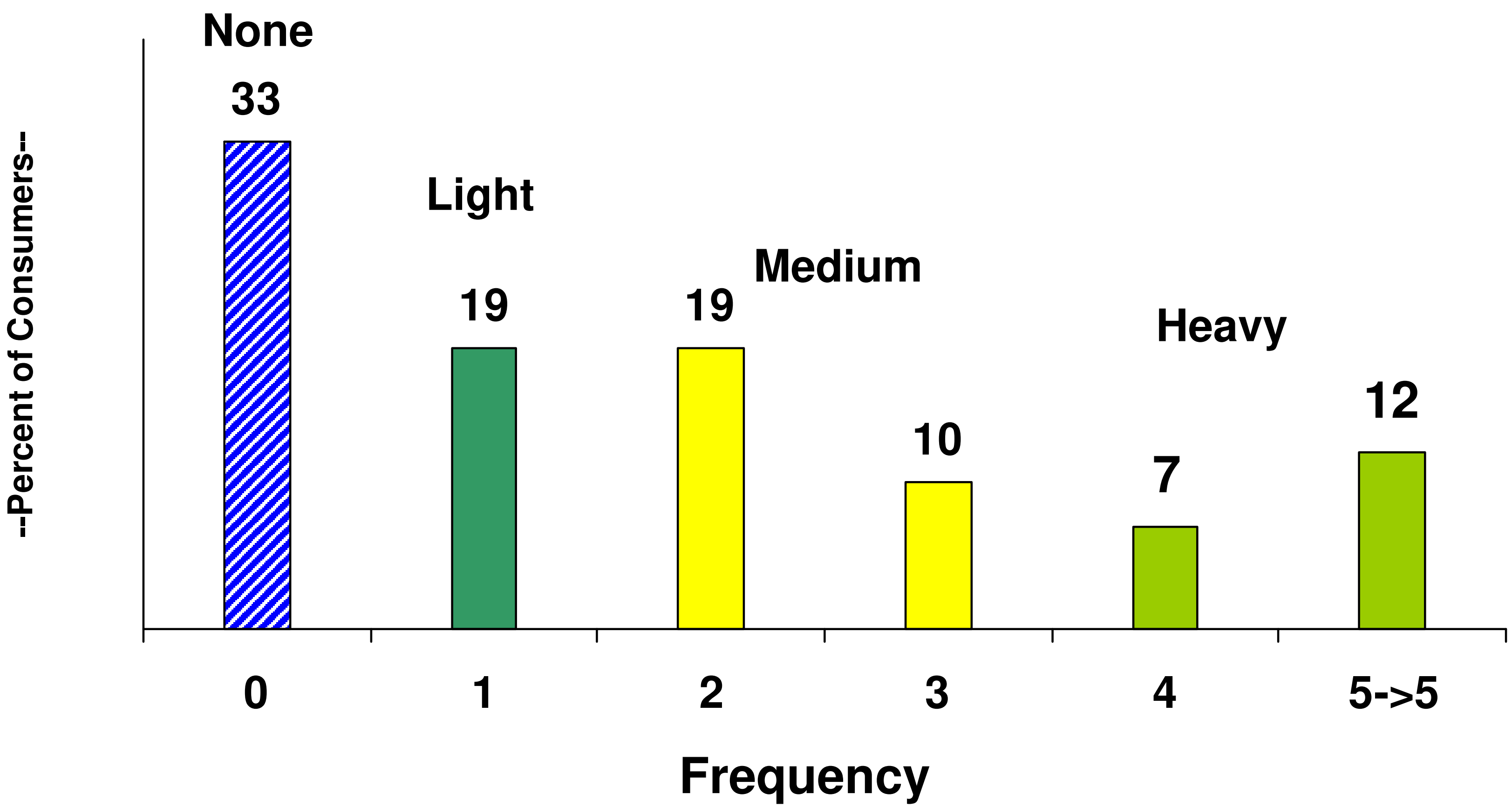
Average times including none: 3.6
Average times excluding none: 4.2

Frequency of Eating Chicken Purchased from Foodservice (Times During Two Weeks/2010)



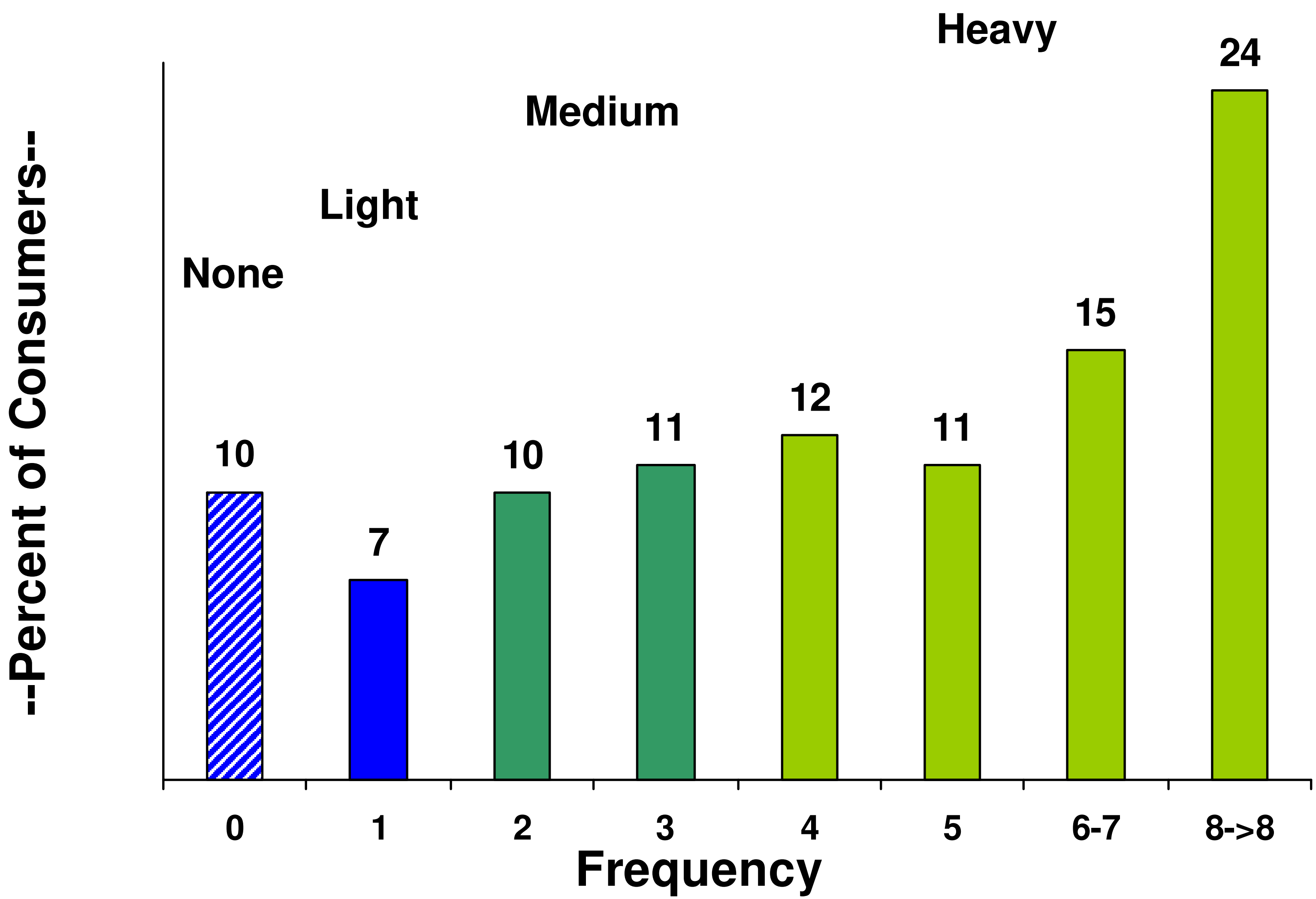
Average times including none: 2.1
Average times excluding none: 3.1

Frequency of Eating Chicken Purchased from Foodservice (Times During Two Weeks/2010)



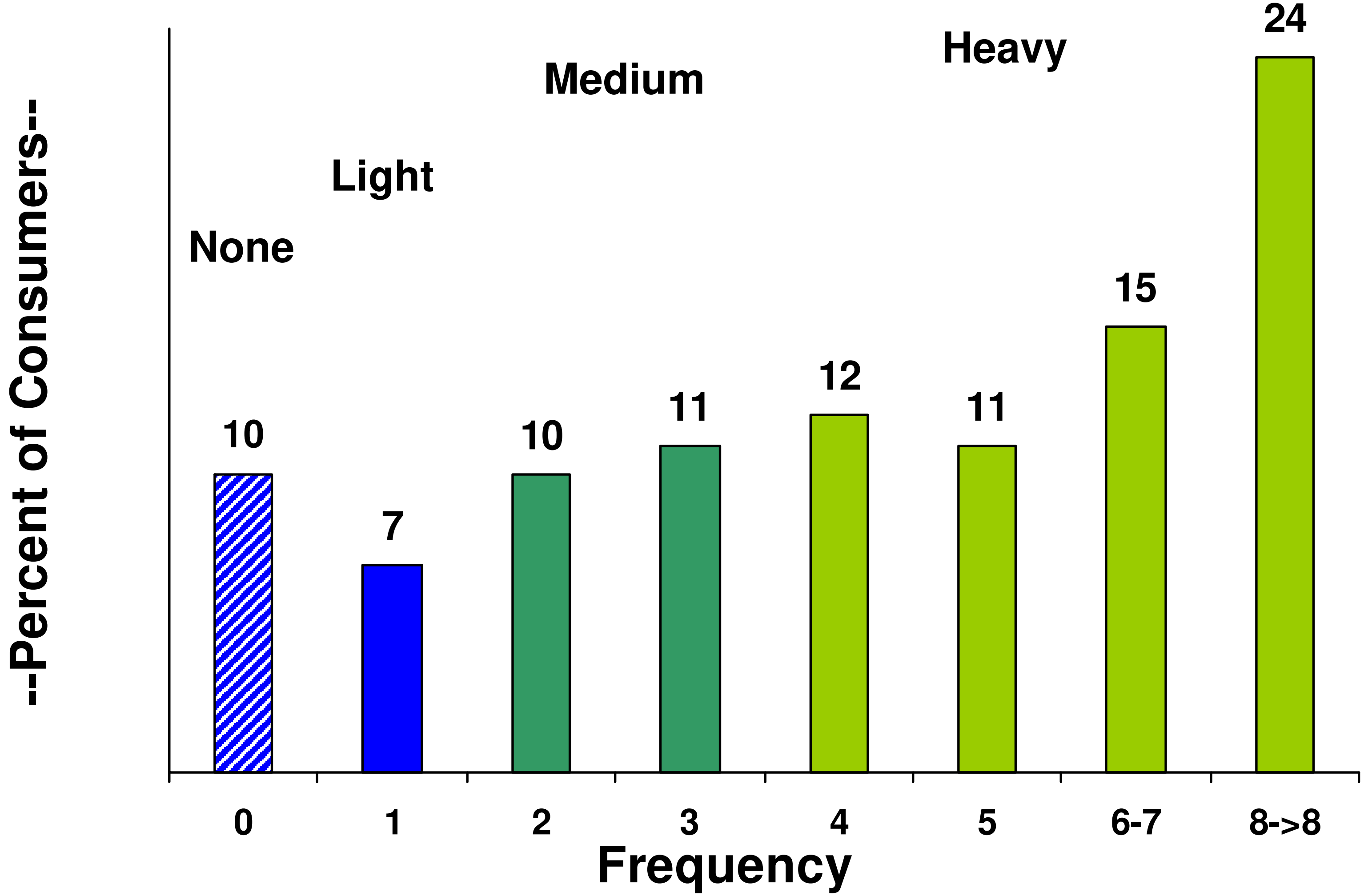
Average times including none: 2.1
Average times excluding none: 3.1

Responses for Eating Chicken from Retail Grocery and Foodservice Combined (Times During Two Weeks/2010)



Average times including none: 5.7 **Average times excluding none: 6.3**

Responses for Eating Chicken from Retail Grocery and Foodservice Combined (Times During Two Weeks/2010)



Average times including none: 5.7

Average times excluding none: 6.3

Reasons Why Chicken Purchased Rather Than Other Meat/Poultry, as Rated by Frequency of Use Groupings, 2010 (Agree Strongly / Agree Somewhat)

Reason	All Respondents[1/]	Usage of Chicken, Total		
		Heavy 4+	Medium 2-3	Light 1
	----------------------------%----------------------------			
Versatile, can be cooked many ways	93	94	91	84
Convenient, easy to prepare	89	91	85	81
More healthful	86	88	83	75
More economical	82	84	81	65
Low in fat	81	82	79	78
Tastes better	80	83	76	57
Tenderness better	79	82	77	59
Quality/wholesomeness are better	79	81	79	56

[1/] All respondents who consumed chicken at least once in the two time period prior to the survey.

Reasons Why Chicken Purchased Rather Than Other Meat/Poultry, as Rated by Generational Groups, 2010 (Agree Strongly/Agree Somewhat)

Reason	All Respondents[1/]	Generation: Millennial (18-34)	Gen X (35-44)	Boomers (45-64)	Greatest Generation (65+)
	---	---	%	---	---
Versatile, can be cooked many ways	93	89	93	95	98
Convenient, easy to prepare	89	87	91	90	88
More healthful	86	82	86	88	87
More economical	82	72	86	89	85
Low in fat	81	74	81	85	90
Tastes better	80	82	78	81	76
Tenderness better	79	76	80	83	79
Quality/wholesomeness are better	79	76	78	83	76

[1/] All respondents who consumed chicken at least once in the two time period prior to the survey.

Reasons Why Chicken Purchased Rather Than Other Meat/Poultry (Respondents[1/] Who Agree Strongly/Agree Somewhat), 2010 Compared with 2002

Reasons	Respondents[1/] 2010	Respondents[1/] 2002	Change
	----------%----------		--Points different--
Versatile, can be cooked many ways	93	96	-3
Convenient, easy to prepare	89	90	-1
More healthful	86	84	2
More economical	82	81	1
Low in fat	81	84	-3
Tastes better	80	74	6
Tenderness better	79	81	-2
Quality/wholesomeness are better	79	80	-1

[1/] All respondents who consumed chicken at least once in the two time period prior to the survey.

Brief Summary Notes

Chicken is more popular than ever with the average frequency rate of eating chicken at-home being 3.6 times during a two-week time period in 2010, the highest rate of any of the surveys since 2001; and 2.1 times for away-from-home eatings, also being the highest rating. Together, the at-home and away-from-home frequency of 5.7 times is a noticeable measure above previous findings.

Brief Summary Notes

The frequency rate of eating chicken was the highest ever, however, the market penetration or share of consumers eating chicken at-home during two weeks was not the highest share found since 2001. The at-home penetration share in 2010 is 85 percent, slightly under the 87 percent high in 2006. Similarly, for away-from-home eatings at 67 percent in 2010, compares favorably to previous high penetration rates but did not top the 69 percent in 2004, the highest share found in the previous surveys.

Brief Summary Notes

Combining at-home and away-from-home eatings in 2010 finds 9 of 10 respondents so doing during a two-week time period. The 90 percent was also found in 2002 and 2005, but falls slightly short of the 92 percent in 2004 and 2006.

Brief Summary Notes

Heavy chicken consumers defined as respondents who eat chicken 4 or more times in a two-week time period, combined at-home and away-from-home, totaled 62 percent in 2010 significantly higher than the 53 percent in 2008.

Brief Summary Notes

Consumers report they prefer to purchase chicken rather than some other meat/poultry for a number of reasons. Chicken's versatility in being able to be cooked in many ways was the top reason in 2010 with more than 9 of 10 respondents so indicated. This reason was followed by convenient, easy to prepare, 89 percent; more healthful, 86 percent; and more economical, 82 percent.

Brief Summary Notes

Compared with the 2002 survey which was the previous time purchase reasons or product attributes were asked, the most significant change in the eight years was the higher rating given to "tastes better." In 2002 "tastes better" ranked last in the list of ten reasons but climbed to sixth place in 2010.

The Following Summary Was

Prepared by Paul Prekopa

President of PKS Research Partners

For more information about the 2010 survey results, contact the National Chicken Council. A print out of the survey data is available via e-mail upon request.

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