Consumers Speak About Chicken Breast Meat/Breast Tenders Survey Results 2012

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WATT PoultryUSA

PoultryUSA

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NCC

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.**
- **Frequency eating fresh/frozen boneless/skinless chicken breast meat or breast tenders that was cooked at-home.**
- **Reasons why consumers might eat boneless/skinless chicken breast meat/breast tenders more often**

How often do consumers eat chicken and how many consumers eat chicken? What are the shares of consumers who are light, medium, and heavy eaters of chicken?

How often do consumers eat fresh/frozen boneless/skinless chicken breast meat/breast tenders that was cooked at home?

How do consumers rate the reasons why they might eat boneless/skinless chicken breast meat/breast tenders cooked at-home more often?

Survey Basics

- **Survey was conducted by PKS Research Partners**
- **1,015 household from pre-screened panel contacted on-line June 4 to 5, 2012; weighted to 1,000 respondents.**
- **Respondents 18 years of age and older**
- **51.5 % females, weighted**
- **48.5 % males, weighted**

Consumers were surveyed by PKS Research Partners in early June 2012. Over 1,000 respondents participated in the on-line survey from a prescreened panel of consumers 18 years of age and older. The sample was weighted to 1,000 respondents to reflect a demographic balance.

PKS Research Partners conducted the survey for the National Chicken Council and funds were provided by *Watt PoultryUSA* magazine.

Survey Basics

Regional Distribution of Respondents (weighted):

Region	Percent
New England	4.9
Mid Atlantic	14.0
East North Central	15.4
West North Central	6.5
South Atlantic	23.3
East South Central	5.1
West South Central	7.9
Mountain	7.9
Pacific	15.0
TOTAL	100

The nine U.S. census regions of the United States are represented in the survey, approximately in proportion to the distribution of the U.S. population in these nine regions.

Survey Basics

Race of Respondents (weighted)

Race	Percent
White (non-Hispanic)	70.7
Hispanic	12.4
Black (non-Hispanic)	9.7
Other	4.8

White participants accounted for over 70 percent of participants in the 2012 survey, while Hispanics were over 12 percent and black respondents almost 10 percent, all on a weighted basis.

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.)**

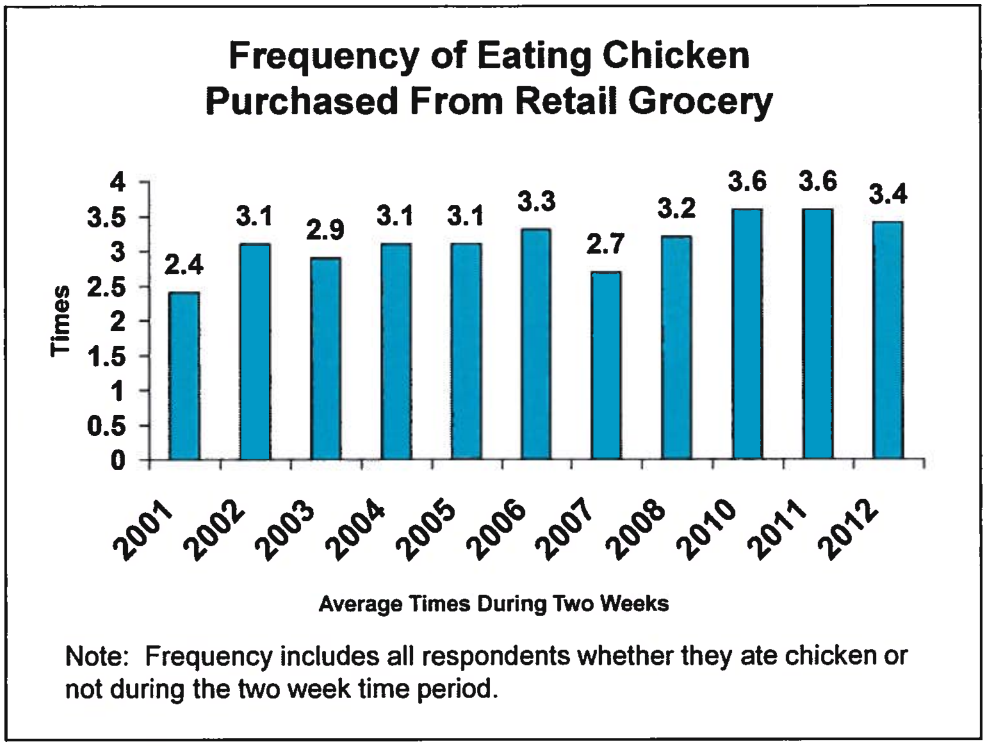
The first question was to determine the consumption rate and market penetration during the two weeks prior to the survey for chicken that was purchased at supermarkets and similar retail grocery stores. Products included fresh, frozen, or prepared chicken purchased at retail grocery stores and supermarkets. Rotisserie roasted chicken and canned chicken meat products were included.

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.)**

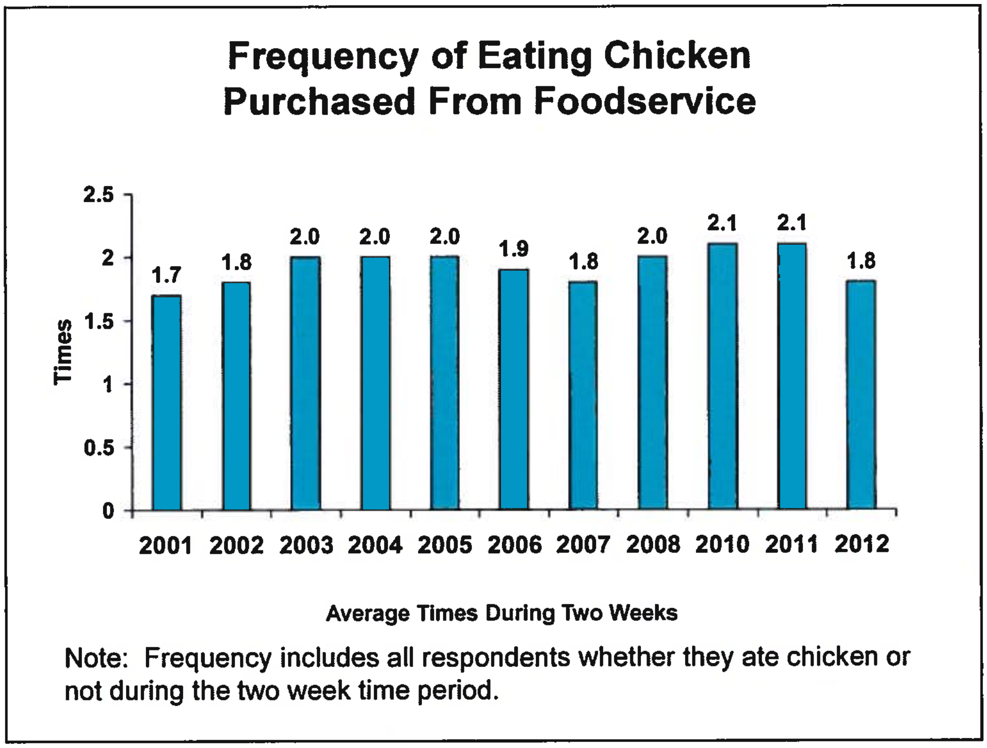
A parallel question to the supermarket/retail grocery store question was asked about chicken purchased from a foodservice establishment, such as a restaurant or cafeteria. Respondents were asked to consider chicken and chicken products purchased at away-from-home eating places, not necessarily where they actually ate chicken.

Using the two weeks prior to the survey as the time period, consumers were asked how many times they ate chicken purchased at a restaurant, fast food store, carry-out shop or employee cafeteria?



Survey results for 2012, compared with 2011 and 2010, indicate that at-home consumption of chicken slipped slightly. The 2012 rate of 3.4 times for eating chicken in the two week timeperiod purchased at a supermarket can, nonetheless, be considered a relatively high level when compared with most of the survey results since 2001.

No survey was conducted in 2009.



Away-from-home chicken purchase frequency in 2012 at 1.8 times during two weeks was not as high as seen in 2008, 2010, and 2011. The 2012 frequency rate compares with 2002 and 2007.

No survey was conducted in 2009.

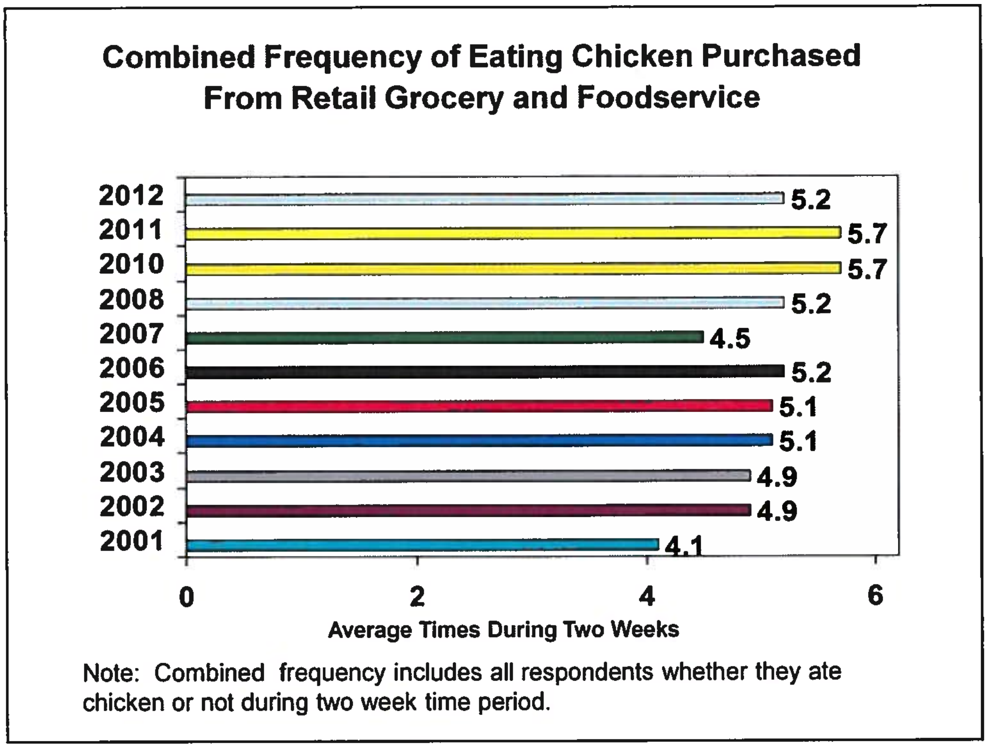
Combined Frequency of Eating Chicken

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Supermarket Grocery Store	2.4	3.1	2.9	3.1	3.1	3.3	2.7	3.2		3.6	3.6	3.4
Restaurant Foodservice	1.7	1.8	2.0	2.0	2.0	1.9	1.8	2.0		2.1	2.1	1.8
Total	4.1	4.9	4.9	5.1	5.1	5.2	4.5	5.2		5.7	5.7	5.2

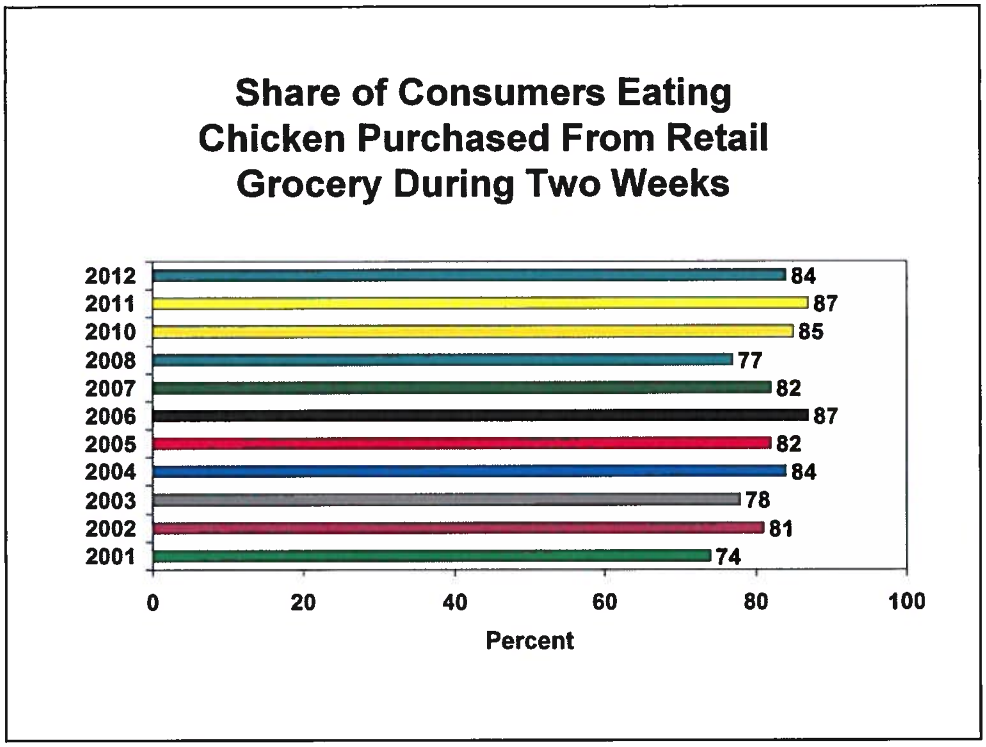
Times During Two Weeks

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

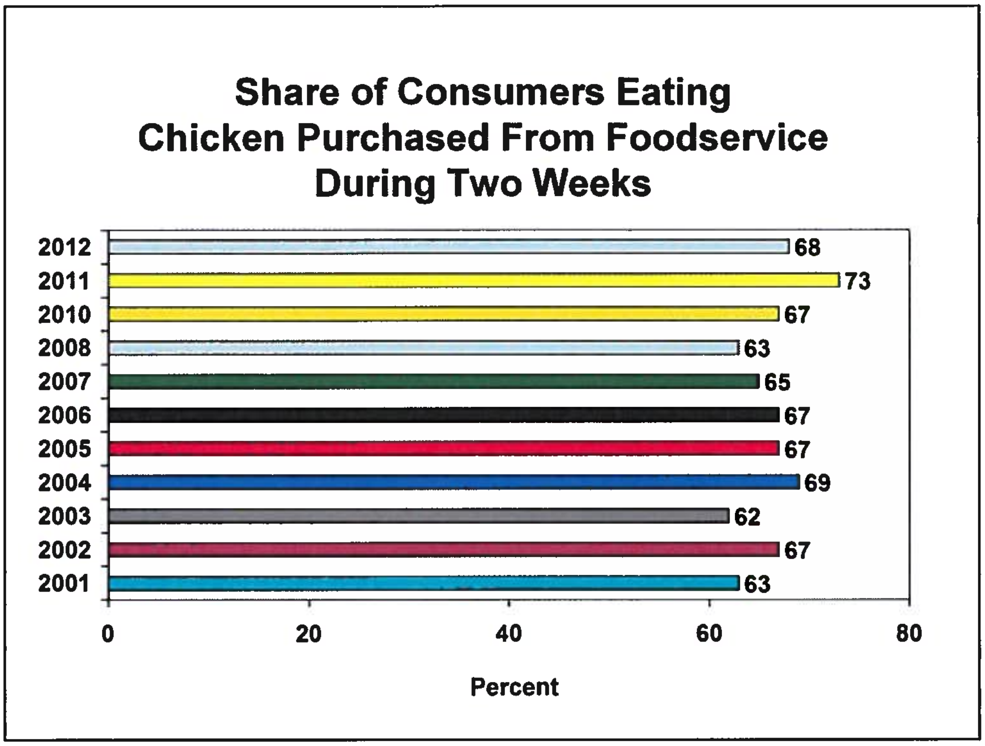
The combined frequency of eating chicken purchased at both supermarket/grocery and restaurant/foodservice is 5.2 times in two weeks for 2012, the same rate found in 2006 and 2008, but below the previous two years of 2010 and 2011. Both chicken from supermarkets and foodservice contributed to the lower frequency rate.



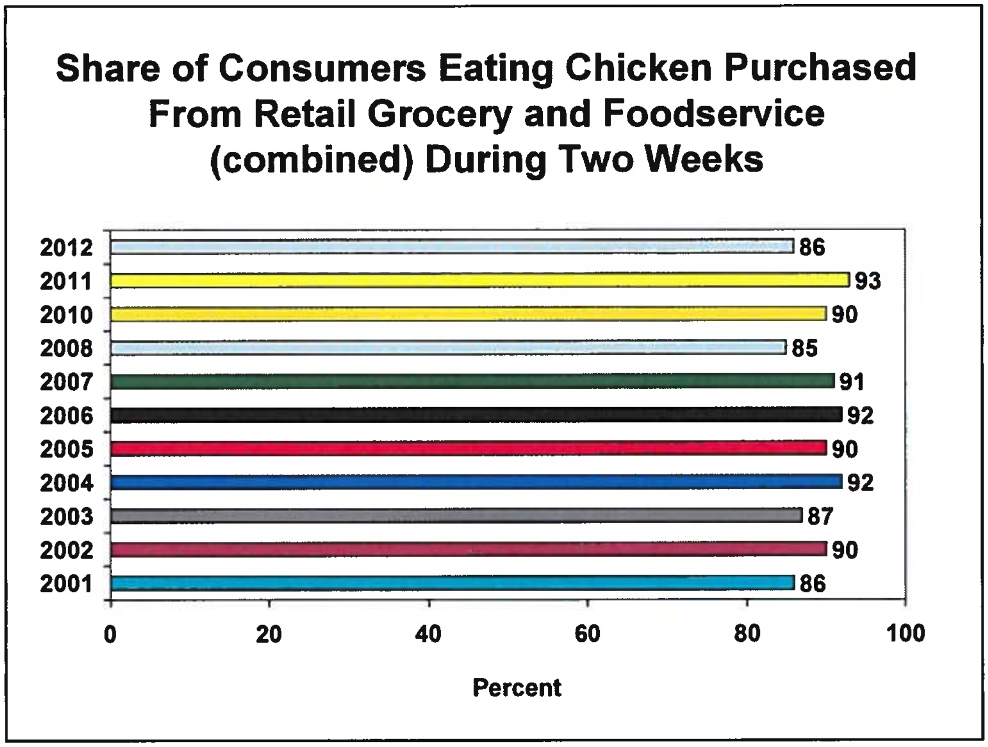
The combined frequency of eating chicken bought at retail grocery/supermarkets and foodservice/restaurants in 2012 (5.2 times during a two week time period) is measurably under the previous two years of 2010 and 2011. The 2012 frequency rate compares to the levels experienced in the mid 2000s.



The household penetration of eating chicken purchased at supermarket/retail grocery decreased in 2012 when compared with the 2010 and 2011 surveys. The 84 percent share of respondents reporting eating chicken from a supermarket during the two weeks time period prior to the survey was last seen in 2004.



A five-point decrease in household penetration for foodservice chicken was found in 2012 when compared with 2011. The share of consumers purchasing chicken from foodservices has declined to about the levels reported in 2002, 2004, 2005, 2006, and 2010.



A decrease in household penetration for supermarket and foodservice chicken combined is noted for 2012 with 86 percent of households eating chicken from retail grocery and foodservice during the two week period. This penetration rate is below the shares seen in 2010 and 2011, but a percentage point above 2008.

Frequency of Eating Chicken by Generational Group During Two Week Time Period, 2010-2012

		Generation				
		Millennial (18-34)	Generation X (35-44)	Boomers (45-64)	Greatest Generation (65+)	All Respondents
	Year	Times During Two Weeks				
(A) Chicken Purchased at Retail Grocery	2010	4.6	3.6	3.2	2.6	3.6
	2011	4.2	3.5	3.4	3.1	3.6
	2012	3.8	3.1	3.7	2.7	3.4
(B) Chicken Purchased at Foodservice	2010	3.1	2.2	1.6	1.1	2.1
	2011	2.8	2.3	1.7	1.6	2.1
	2012	2.3	1.8	1.5	1.3	1.8
Combined A & B	2010	7.7	5.8	4.8	3.7	5.7
	2011	6.9	5.8	5.1	4.8	5.7
	2012	6.1	4.9	5.2	3.9	5.2

During 2010 to 2012 millennial households (ages 18 to 34 years) are clearly the heaviest users of chicken when compared with the three other generational groups. This conclusion is the case for both at-home chicken and away-from-home chicken. Generation X (ages 35-44 years) consumers seem to be somewhat more typical chicken users when compared with all respondents.

Boomers (45-64 years of age) in 2012 stepped-up their frequency of chicken purchases at supermarkets, unlike the other generational groups. Away-from-home chicken purchase frequency declined across all generational groups, as did combined frequencies, except for boomers.

Share of Generational Group Eating Chicken During Two Week Time Period, 2010-2012

---------G e n e r a t i o n---------

		Millennial (18-34)	Generation X (35-44)	Boomers (45-64)	Greatest Generation (65+)	All Respondents
	Year	Percent				
(A) Chicken Purchased at Retail Grocery	2010	90	86	83	79	85
	2011	88	90	86	88	87
	2012	83	82	87	81	84
(B) Chicken Purchased at Foodservice	2010	80	71	61	50	67
	2011	80	74	69	65	73
	2012	73	71	66	59	68
Combined A & B	2010	92	91	88	88	90
	2011	93	92	94	92	93
	2012	82	86	89	88	86

In 2012 Boomers (45-64 years of age) report the highest households penetration rate of the four generational groups for chicken purchased at supermarkets while millennials (18-34 years of age) report the highest share for chicken purchased at foodservice. When the two sources of chicken purchases are combined, the penetration rate is somewhat comparable across the generational groups except for millennials (18-34 years of age) in 2012 when there was a marked decrease compared with the previous two years.

Frequency of Eating Chicken by Demographic Group During Two Week Time Period, 2010-2012

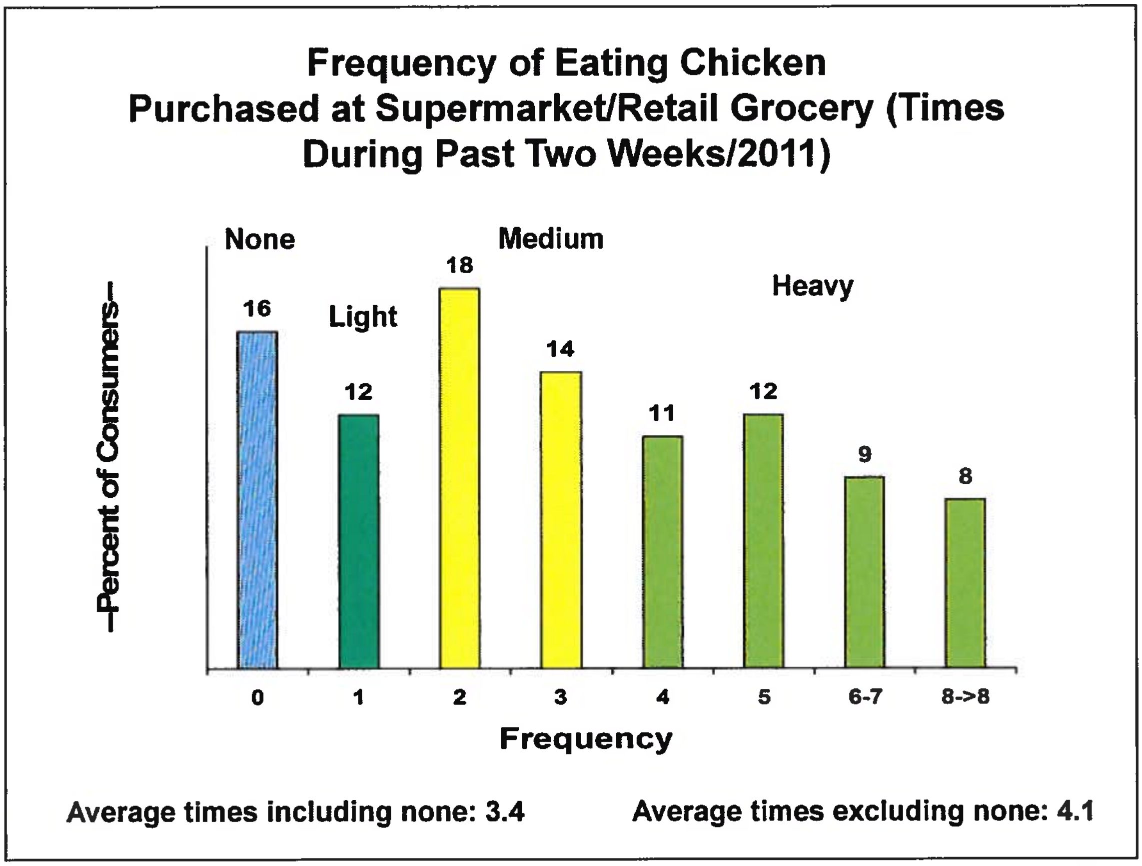
		Demographic Group				
		Any Hispanic	Black Only (Non-Hispanic)	White Only (Non-Hispanic)	All Others	All Respondents
	Year	Times During Two Weeks				
(A) Chicken Purchased at Retail Grocery	2010	4.0	4.1	3.4	3.8	3.6
	2011	4.2	4.5	3.3	3.7	3.6
	2012	4.5	3.7	3.3	1.9	3.4
(B) Chicken Purchased at Foodservice	2010	2.9	2.2	1.8	3.1	2.1
	2011	3.2	2.5	1.8	2.1	2.1
	2012	2.2	1.7	1.7	2.1	1.8
Combined A & B	2010	6.9	6.3	5.2	6.9	5.7
	2011	7.3	7.1	5.1	5.8	5.7
	2012	6.7	5.5	5.0	4.0	5.2

Hispanic and black consumers eat chicken significantly more often than white consumers. In 2012 the average consumer's frequency of 5.2 times during two weeks was slightly above the white consumer's rate of 5.0 times. Hispanic consumers frequency of purchase at retail grocery in 2012 gained when compared with the two prior years, in contrast to the other demographic groups. Chicken's challenge at foodservice appears to be across all demographic groups. "All others" particularly decreased in frequency for both retail grocery and foodservice. "All others" include Asian consumers and similar minority groups.

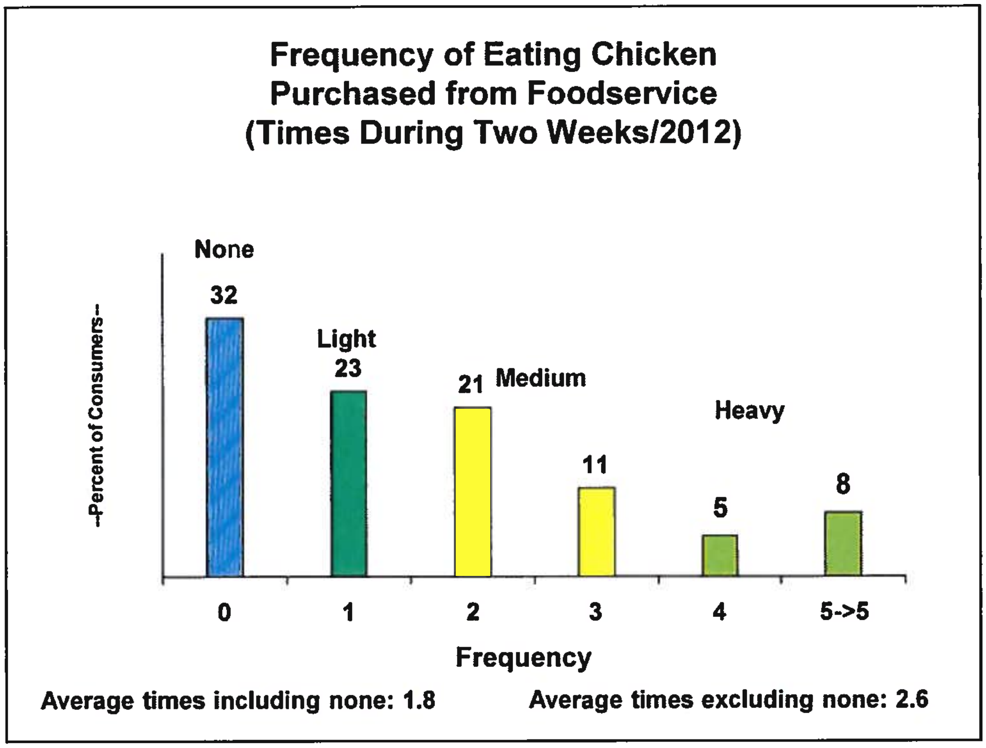
Share of Demographic Group Eating Chicken During Two Week Time Period, 2010-2012

		----------Demographic Group----------				
		Any Hispanic	Black Only (Non-Hispanic)	White Only (Non-Hispanic)	All Others	All Respondents
	Year	Percent				
(A) Chicken Purchased at Retail Grocery	2010	90	89	83	91	85
	2011	95	89	86	85	87
	2012	85	91	84	59	84
(B) Chicken Purchased at Foodservice	2010	79	76	62	80	67
	2011	83	84	68	83	73
	2012	70	79	67	64	68
Combined A & B	2010	92	92	89	91	90
	2011	96	91	92	95	93
	2012	89	89	87	61	86

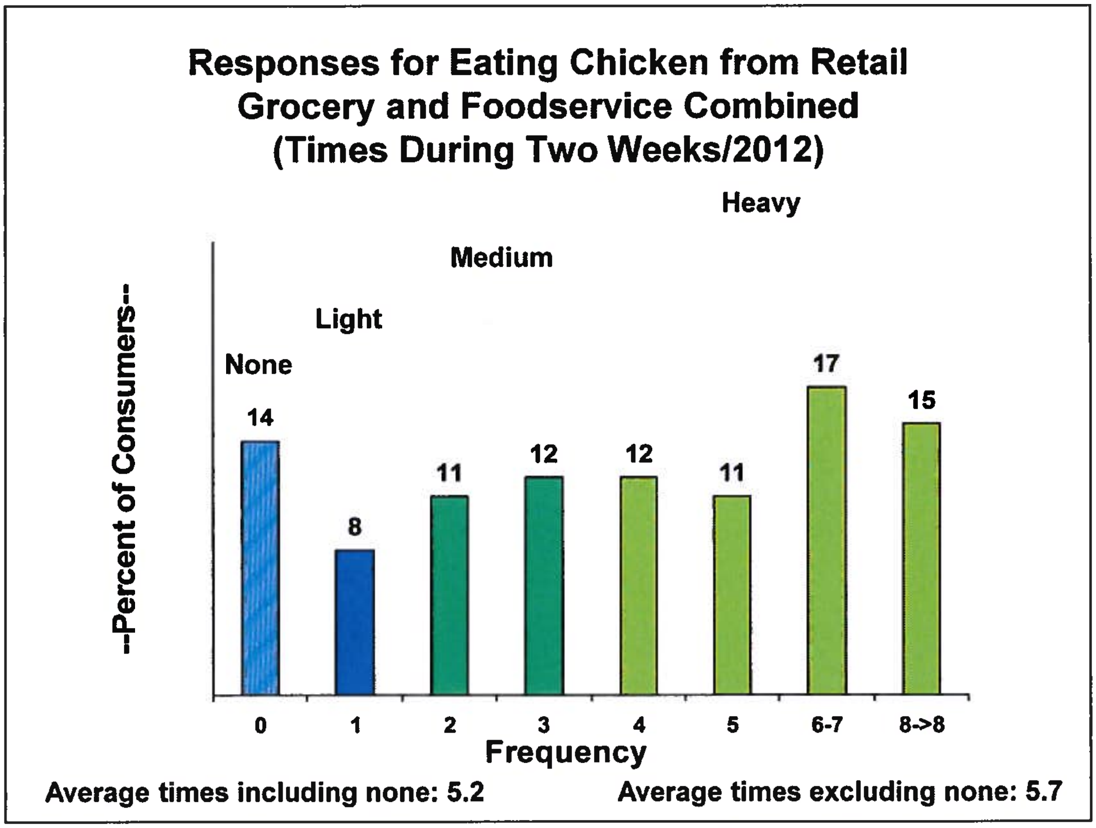
Hispanic consumers and black consumers in 2012 report a slightly higher share of eating chicken during two-week timeperiod when retail grocery chicken is combined with foodservice chicken. As is the situation for frequency of eating chicken, the penetration rates declined essentially across all demographic groups in 2012.



Chicken purchased from a supermarket/grocery food store was eaten on average 3.4 times in the past two weeks, including respondents who said they ate no supermarket-purchased chicken during this time, while the average increases to 4.1 times excluding non-chicken eaters. Respondents who indicate they did not eat chicken purchased from a supermarket/grocery store in the previous two weeks represent 16 percent, somewhat higher when compared with the share of non-eaters in 2011 (13 percent).



Respondents eat chicken purchased at restaurants, fast food stores, or employee cafeterias, and similar foodservice operations an average of 1.8 times during two weeks, including non-eaters of foodservice chicken. Excluding non-chicken eaters raises the average to 2.6 times during two weeks. By comparison, in 2011 the frequency for these two measures were 2.1 and 2.9, respectively. The share of consumers not eating foodservice chicken during the two weeks time period in 2012 is 32 percent compared with 27 percent in 2011.



Combining responses for eating chicken purchased from supermarket/ retail grocery food stores and restaurants/foodservice establishments presents a somewhat different picture than looking at each market channel individually. In 2012 consumers ate chicken 5.2 times during two weeks when all respondents are included and 5.7 times when non-chicken eaters are excluded. These rates are somewhat below the frequency found in 2011 when the survey found 5.7 times and 6.2 times, respectively. Fourteen percent of respondents eat no chicken when both at-home and away-from-home are combined, compared with 7 percent in 2011. Almost one-third of consumers eat chicken six or more times in two weeks in 2012.

Question 3

- **How many times during the past four weeks was fresh or frozen boneless/skinless chicken breast meat or breast tenders eaten that was cooked at-home?**

Note: Question 3 was asked of only respondents who indicated eating chicken at-home (Question 1). Therefore, the number of respondents to Question 3 was 839 (weighted) rather than the 1,000 (weighted) respondents who answered Questions 1, 2, and 5.

This question referenced a four week timeperiod or double the timeperiod for Questions 1 and 2. The results were analyzed for frequency and household penetration rates.

Question 3 was asked of only respondents who indicated eating chicken at-home (Question 1). Therefore, the number of respondents to Question 3 was 839 (weighted) rather than the 1,000 (weighted) respondents who answered Questions 1, 2, and 5.

Frequency of Eating Fresh/Frozen Boneless/Skinless Chicken Breast Meat/Breast Tenders That Was Cooked At-Home During Past Four Weeks, 2012, Usage Groups

Chicken Usage At Home

Heavy (4+ times)	Medium (2-3 times)	Light (once)	All* Respondents
------------ *times during four weeks* ------------			
5.5	2.6	1.2	3.8

* All respondents refer to only respondents who ate chicken at-home (Question 1).
** Grouped by chicken usage at-home during past two weeks, including non-users of chicken at-home.

For survey respondents who ate chicken at-home (Question 1), the average number of times during four weeks that they ate boneless/skinless chicken breast meat/breast tenders that were cooked at-home was 3.8.

As might be expected, heavy users of chicken at-home eat boneless/skinless chicken breast meat/breast tenders at a much higher rate (5.5 times in four weeks) than medium and light users.

Frequency of Eating Fresh/Frozen Boneless/Skinless Chicken Breast Meat/Breast Tenders That Was Cooked At-Home During Past Four Weeks, 2012, Generational Groups

Generational Groups

Millennials (18-34)	Generation X (35-44)	Boomers (45-64)	Greatest Generation (65+)	All* Respondents
------------------ *times during four weeks* --------------------				
4.0	4.0	3.7	3.3	3.8

* **All respondents refer to only respondents who ate chicken at-home (Question 1).**

Millennials and Generational X groups eat boneless/skinless chicken breast meat/breast tenders once a week or 4.0 times during four weeks. This rate slips to 3.7 times for Boomers and to 3.3 times for the Greatest Generation.

Share of Consumers Eating Fresh/Frozen Boneless/Skinless Chicken Breast Meat/Breast Tenders That Was Cooked At-Home During Past Four Weeks, 2012, Usage Groups

Chicken Usage At Home

Heavy (4+ times)	Medium (2-3 times)	Light (once)	All* Respondents
times during four weeks			
91	84	74	86

* All respondents refer to only respondents who ate chicken at-home (Question 1).
** Grouped by chicken usage at-home during past two weeks, including non-users of chicken at-home.

For all respondents who ate chicken at-home (Question 1), the share that ate fresh/frozen boneless/skinless chicken breast meat/breast tenders that was cooked at-home during the four weeks was 86 percent.

Heavy users of chicken at-home eat boneless/skinless chicken breast meat/breast tenders at a higher share (91 percent) than do medium users (84 percent) and light users (79 percent), as might be expected.

Share of Consumers Eating Fresh/Frozen Boneless/Skinless Chicken Breast Meat/Breast Tenders That Was Cooked At-Home During Past Four Weeks, 2012, Generational Groups

Generational Groups

Millennials (18-34)	Generation X (35-44)	Boomers (45-64)	Greatest Generation (65+)	All* Respondents
---------------- *share of respondents eating during four weeks %* -------------				
86	87	86	86	86

* All respondents refer to only respondents who ate chicken at-home (Question 1).

All four generational groups eat boneless/skinless chicken breast meat/breast tenders at a very consistent share, 86 or 87 percent.

Question 4

- **Thinking only about your purchases of boneless/skinless chicken breast or breast tenders at your favorite supermarket or similar retail grocery food store, please indicate which of the following best describes how you shop for either fresh or frozen boneless/skinless chicken breast meat or breast tenders.**

* **Question 4 was asked of only respondents who ate chicken at-home (Question 1). Therefore, the number of respondents to Question 4 was 839 (weighted) rather than the 1,000 (weighted) respondents who answered Questions 1, 2, and 5.**

The possible options can be selected by respondents were as follows:

- Buy only when boneless/skinless chicken breast meat or breast tenders are on sale at featured lower price and stock-up to put in home freezer
- Buy only when boneless/skinless chicken breast meat or breast tenders are on sale at a featured lower price, but do NOT stock-up to put extra in home freezer
- Buy boneless/skinless breast meat or breast tenders only for special occasions, such as gathering of extended family and friends, outdoor grilling, food for social gathering outside of home, and similar occasions
- Buy boneless/skinless chicken breast meat or breast tenders as needed without too much concern for price
- Rarely, if ever, buy boneless/skinless chicken breast meat or breast tenders at my favorite supermarket or retail grocery food store because preference is for other parts of the chicken, such as leg, leg quarter, thigh, drumstick, or whole chicken
- Buy boneless/skinless chicken thigh meat because it is preferred over boneless/skinless breast chicken meat or breast tenders

Consumers Best Describe How They Shop for Fresh/Frozen Boneless/ Skinless Chicken Breast Meat/Breast Tenders At Favorite Supermarket/ Retail Grocery Store, 2012

For Boneless/Skinless Chicken Breast Meat/Breast Tenders:	Share of Respondents ----- percent -----
Buy only when on sale at featured lower price and stock-up to put in home freezer	41
Buy as needed without too much concern for price	25
Buy only when on sale at a featured lower price, but do NOT stock-up to put in home freezer	19
Buy only for special occasions, such as gathering of extended family and friends, outdoor grilling, food for special gathering outside of home, and similar occasions	6
Rarely, if ever, buy because preference is for other parts of the chicken, such as leg, leg quarter, thigh, drumstick, or whole chicken	6
Buy boneless/skinless chicken thigh meat because it is preferred over boneless/skinless breast chicken meat or breast tenders	3
TOTAL	100

Buying boneless/skinless chicken breast meat/breast tenders on sale and stocking-up in the home freezer is the most frequent way of purchasing these products with over 4 out of 10 consumers so indicating.

Price was a secondary concern for one out of four consumers. Interestingly, nine percent (six percent and three percent) report a preference for dark meat over white meat.

Question 4 was asked of only respondents who ate chicken at-home (Question 1). Therefore, the number of respondents to Question 4 was 839 (weighted) rather than the 1,000 (weighted) respondents who answered Questions 1, 2, and 5.

Consumers Best Describe How They Shop for Fresh/Frozen Boneless/ Skinless Chicken Breast Meat/Breast Tenders At Favorite Supermarket/ Retail Grocery Store, 2012, Demographic Groups

For Boneless/Skinless Chicken Breast Meat/Breast Tenders:	Share of Respondents ----- *percent* -----			
	White	*Black*	*Hispanic*	*All Respondents*
Buy only when on sale at featured lower price and stock-up to put in home freezer	44	37	37	41
Buy as needed without too much concern for price	28	16	22	25
Buy only when on sale at a featured lower price, but do NOT stock-up to put in home freezer	17	14	21	19
Buy only for special occasions, such as gathering of extended family and friends, outdoor grilling, food for special gathering outside of home, and similar occasions	4	7	15	6
Rarely, if ever, buy because preference is for other parts of the chicken, such as leg, leg quarter, thigh, drumstick, or whole chicken	4	21	4	6
Buy boneless/skinless chicken thigh meat because it is preferred over boneless/skinless breast chicken meat or breast tenders	3	5	1	3
TOTAL	100	100	100	100

There are interesting variations when purchasing methods are viewed from a demographic perspective. White consumers buy on feature price and stock-up at a higher rate than Black and Hispanic consumers, but White consumers are also less concerned about price. The one out of five (21 percent) of Black consumers who report have a preference for non-white meat is in sharp contrast to the four percent reported by White and Hispanic consumers.

All respondents refer to only respondents who ate chicken at-home (Question 1).

Consumers Best Describe How They Shop for Fresh/Frozen Boneless/ Skinless Chicken Breast Meat/Breast Tenders At Favorite Supermarket/ Retail Grocery Store, 2012, Generational Groups

For Boneless/Skinless Chicken Breast Meat/Breast Tenders:	Share of Respondents ----- percent -----				
	Millennial	*Generation X*	*Boomers*	*Greatest Generation*	*All Respondent s*
Buy only when on sale at featured lower price and stock-up to put in home freezer	32	42	43	50	41
Buy as needed without too much concern for price	28	21	26	23	25
Buy only when on sale at a featured lower price, but do NOT stock-up to put in home freezer	20	22	17	16	19
Buy only for special occasions, such as gathering of extended family and friends, outdoor grilling, food for special gathering outside of home, and similar occasions	8	9	4	5	6
Rarely, if ever, buy because preference is for other parts of the chicken, such as leg, leg quarter, thigh, drumstick, or whole chicken	8	4	8	4	6
Buy boneless/skinless chicken thigh meat because it is preferred over boneless/skinless breast chicken meat or breast tenders	4	4	2	3	3
TOTAL	100	100	100	100	100

Boomers lead as a generational group that prefers to buy boneless/skinless chicken breast/breast tenders at a featured price and stock-up, with one in two Boomers so indicating. Millennials are the least sensitive to price.

All respondents refer to only respondents who ate chicken at-home (Question 1).

Question 5

- **Using a scale of one to five where five means "a very strong reason" and one means "not much of a reason", please indicate whether each of the following are reasons why you might eat boneless/skinless chicken breast or breast tenders more often?**

* **Question 5 was asked of all survey respondents (1,000 weighted).**

The possible options can be selected by respondents were as follows:

- If it tasted better
- Had a lower price
- Was more convenient to use/prepare
- Had more recipes and serving suggestions
- Were in smaller pieces in package
- Had more uniform pieces in package
- Had more nutritional information about the product

Reasons Why Consumers Would Eat Boneless/ Skinless Chicken Breast Meat/Breast Tenders More Often, 2012

Reason	Rating
Had a lower price	3.5
Was more convenient to use/prepare	3.1
If it tasted better	3.0
Had more recipes and serving suggestions	2.8
Had more uniform pieces in package	2.6
Were in smaller pieces in package	2.6
Had more nutritional information about the product	2.5

5 = a very strong reason   1 = not much of a reason

Price received the highest rating (3.5) as a reason consumers would eat boneless/skinless chicken breast meat/breast tenders more often. Convenience was the second highest rating at 3.1. Consumers apparently feel they have enough nutritional information about boneless/skinless chicken breast meat/breast tenders since this reason received the lowest rating at 2.5

* Question 5 was asked of all survey respondents (1,000 weighted).

Reasons Why Consumers Would Eat Boneless / Skinless Chicken Breast Meat / Breast Tenders More Often, 2012, Demographic Groups

Reason	White	Black	Hispanic	All Respondents
	----- Rating -----			
Had a lower price	3.5	3.5	3.5	3.5
More convenient to use / prepare	3.0	3.5	3.2	3.1
If it tasted better	3.0	3.4	3.2	3.0
Had more recipes and serving suggestions	2.7	3.1	3.0	2.8
Had more uniform pieces in package	2.5	2.9	2.9	2.6
Were in smaller pieces in package	2.5	2.8	2.8	2.6
Had more nutritional information about the product	2.4	3.0	2.7	2.5

1 = not much of a reason *5 = a very strong reason*

Responses were somewhat consistent across the demographic groups regarding the reasons that would prompt more often eating of boneless/skinless breast meat/ breast tenders. This conclusion was especially the valid regarding a lower price where a rating of 3.5 out of 5.0 was found across the groups. At the same time, however, Black and Hispanic consumers indicate slightly higher ratings than for white consumers for other reasons, such as convenience, taste, recipes, uniformity, smaller pieces, and more nutritional information.

All respondents refer to only respondents who ate chicken at-home (Question 1).

Reasons Why Consumers Would Eat Boneless / Skinless Chicken Breast Meat / Breast Tenders More Often, 2012, Generational Groups

Reason	Millennials (18-34)	Generation X (35-44)	Boomers (45-64)	Greatest Generation (65 +)	All Respondents
	---------- Rating ----------				
Had a lower price	3.5	3.6	3.6	3.2	3.5
More convenient to use / prepare	3.3	3.1	2.9	3.0	3.1
If it tasted better	3.1	3.0	3.0	2.9	3.0
Had more recipes and serving suggestions	2.9	2.8	2.6	2.7	2.8
Had more uniform pieces in package	2.7	2.7	2.5	2.6	2.6
Were in smaller pieces in package	2.8	2.7	2.5	2.6	2.6
Had more nutritional information about the product	2.7	2.6	2.5	2.3	2.5

1 = not much of a reason *5 = a very strong reason*

Generation groups expressed a somewhat consistent pattern of responses when asked about reasons that would prompt more often eating of boneless/skinless chicken breast meat/breast tenders. However, the Greatest Generation consumers tend to have lower ratings for most reasons than do the other generational groups.

All respondents refer to only respondents who ate chicken at-home (Question 1).

For more information about the 2012 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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FREQUENCY OF EATING MEALS AND SNACKS CONTAINING CHICKEN IN THE PAST TWO WEEKS – TOTAL CONSUMPTION

Among the total sample, nine out of ten (91%) respondents had eaten a meal or snack that contained chicken in the two weeks prior to the survey; this is in line with the 2011 survey.

Overall, the average number of meals or snacks that contained chicken eaten by respondents in the two weeks prior to the survey was 5.2. This is statistically in line with the 2011 findings. Millennial respondents (18 and 34) remain the most likely to eat chicken meals or snacks frequently (6.1). They are trailed by Boomers (45-64, 5.2) and Gen Xers (35–44, 4.9). The Greatest Generation (65 or older) tends to eat the fewest chicken meals and snacks (3.9).

Larger households are more likely to have eaten chicken meals or snacks more frequently over the two week period. One or two person households averaged 4.5 meals or snacks, three or four person households averaged 6.2 meals or snacks.

Respondents with household incomes of $25k<$40k tend to eat chicken less frequently (3.9 times in the two week period versus 5.2 times for the total sample).

Chicken consumption does not differ significantly by gender.

Northeasterners ate the highest number of meals or snacks that contained chicken in the two week period prior to the survey.

Region	**Average number of meals/snacks eaten that contained chicken**
Northeast	5.7
West	5.2
South	5.1
Midwest	4.8

The proportion eating chicken in the two weeks prior to the survey is fairly flat across the nine census regions. There are some minor variation in the rate of consumption with Mid-Atlantic respondents having the highest rate (5.8) and those in the West North Central and Mountain areas having the lowest rates (4.5 and 4.5).

One third (33%) of heavy users ate eight or more meals or snacks that contained chicken during the two weeks prior to the survey. Further, 61% had eaten chicken six or more times. This is consistent with the findings of the 2011 survey.

FREQUENCY OF EATING MEALS AND SNACKS CONTAINING CHICKEN IN THE PAST TWO WEEKS THAT WERE PURCHASED AT A GROCERY STORE

Respondents were asked the number of times in the two weeks prior to the survey they had eaten chicken that was purchased from a supermarket or other grocery store.

Most respondents (84%) ate one or more meals containing chicken that were purchased from a grocery store in the two weeks prior to the survey. This is a slight decline versus 2011 (87%). Consistent with 2011, nearly three out of ten (28%) respondents ate chicken frequently (five or more times in the two weeks prior to the survey) and all respondents ate chicken from grocery store an average of 3.4 times.

Heavy users (of chicken at home) ate chicken from grocery store an average of 6.4 times in the previous two weeks.

The Greatest Generation (2.7) and Gen X (3.1) had a somewhat lower average frequency of consuming chicken from a grocery store in the past two weeks (Millenial, 3.8 and Boomers, 3.7).

Larger household and households with $50k plus incomes consume chicken more frequently than counterparts. Gender and region do not seem to significantly impact how frequently respondents have eaten chicken from a grocery store in the two weeks prior to the survey.

Segment	**Average number of times eaten chicken in two week period**
Overall sample	3.4
Under 65	3.6
$50k and over	3.7
Three person household	4.4
Four person household	4.1
Heavy (at home) Users	6.4

Below is the average number of times chicken from a grocery was eaten in the two weeks prior to the survey by region.

Region	Average number of times eaten chicken in two week period
Northeast	3.8
West	3.5
South	3.3
Midwest	3.2

FREQUENCY OF EATING MEALS AND SNACKS CONTAINING CHICKEN IN THE PAST TWO WEEKS THAT WERE PURCHASED AT FOOD SERVICE

Respondents were also asked the number of times in the two weeks prior to the survey they had eaten chicken that was purchased at any type of restaurant, fast food store, carry-out shop or employee cafeteria.

Overall, nearly seven out of ten (68%) respondents had at least one meal/snack containing chicken from a restaurant, fast food store, carry-out shop or employee cafeteria. While a significant decrease from 2011 (73%), this does represent a return to the proportion found in the 2010 survey (67%). The average number of meals/snacks respondents had eaten that contained chicken outside of their home in the two weeks prior to the survey has declined somewhat to 1.8 from 2.1 in the last two surveys.

The proportion of respondents eating meals which contained chicken outside the home frequently (five or more times) has also declined (2012: 8% versus 2011: 12%).

Heavy users (outside the home) ate a meal containing chicken outside the home an average of 5.9 times in the two weeks preceding the survey.

The Greatest Generation and Boomers are less likely than Gen Xers and Millennials to consume chicken from a service location and as one would expect, the older groups consume chicken less frequently from food service locations.

	Past Two Weeks	
Age	Consumed at Least Once	Mean
Millennials	73%	2.3
Gen X	71%	1.8
Boomers	66%	1.5
Greatest Generation	59%	1.3

Additionally, respondents with an income under $50k are less likely than more upscale respondents to have eaten a chicken meal outside the home (65% versus 70%).

Interestingly, those in two person households are less likely than either those residing smaller or larger households to have eaten a chicken meal outside the household (64% versus 71%)

Respondents in the West are somewhat less likely than those in other parts of the country to have eaten chicken outside the home in the past two weeks.

Region	Eaten chicken in two week period
Overall sample	68%
West	62%
Midwest	67%
Northeast	70%
South	71%

Looking across the nine census divisions, respondents in East South Central (59%) and Mountain (57%) regions are less likely than those in the rest of the country to have eaten one or more chicken meals in the two weeks prior to the survey at a food service location.

FREQUENCY OF EATING HOME COOKED BONELESS/SKINLESS CHICKEN BREAST MEAT OR TENDERS IN PAST FOUR WEEKS

Among those who purchased chicken at a supermarket/grocery store, nearly nine out of ten (86%) have eaten boneless/skinless chicken breast/tenders that was prepared at home in the past four weeks. Nearly three out of ten (28%) have done so frequently (five or more times). While a large majority of all segments have eaten home cooked boneless/skinless chicken at home in the past four weeks, some variations are noted.

Respondents living in the Northeast seem to have a preference for boneless/skinless chicken breast/tenders prepared at home.

Region	Boneless/skinless chicken - four weeks
Overall sample	86%
Northeast	92%
Midwest	87%
South	85%
West	80%

Nine out of ten (91%) heavy (at home) chicken users have eaten home cooked boneless/skinless chicken breast/tenders in the past four weeks.

Women are significantly more likely than men to have eaten home cooked boneless/skinless chicken breast/tenders: 89% versus 83%.

Larger households (at least 3 people) were more likely than smaller households to have eaten home cooked boneless/skinless chicken breast/tenders in the past four weeks (91% versus 83%).

There were no significant variations by age.

PURCHASE BEHAVIOR OF BONELESS/SKINLESS CHICKEN BREAST MEAT OR TENDERS

Respondents who purchased chicken at a supermarket/grocery were asked which of several statements best described their purchasing behavior of boneless/skinless chicken breast meat or tenders.

Among the statements included in this research, "buy only when boneless/skinless chicken breast meat or breast tenders are on sale at featured lower price and stock-up to put in home freezer" was the leading response – 41%.

Behavior	**Purchase at Store**
Buy only on sale at featured lower prices and stock-up to put in home freezer	41%
Buy as needed without too much concern for price	25%
Buy only on sale at featured lower price, but do NOT stock-up to put extra in home freezer	19%
Buy only for special occasions, such as gathering of extended family and friends, outdoor grilling, food for social gathering outside of home, and similar occasions	6%
Rarely buy, preference is for other parts of the chicken such as leg, leg quarter, thigh, drumstick, or whole chicken	6%
Buy boneless/skinless chicken thigh meat because it is preferred	3%

A couple of demographic distinctions are noted:

- Older respondents (45 and older) are much more likely than younger respondents to stock-up on sale boneless/skinless chicken breast meat/tenders (46% versus 35%).
- And, as one would expect, respondents with an income of over $50k (30%) are more likely than those with an income of less than $50K (18%) to buy without too much concern for price.

MOTIVATING FACTORS TO EAT BONELESS/SKINLESS CHICKEN BREAST MEAT OR TENDERS MORE OFTEN

Lastly, respondents rated the strength of possible motivations for increasing their boneless/skinless breast meat or tenders consumption. A scale of one to five was utilized where "five" meant "a very strong reason" and "one" meant "not much of a reason".

Respondents are primarily concerned with three areas: lower price, packaging/convenience and taste. While nutritional information did not score highly, this *may* be due to general consumer awareness about the health value of chicken.

Motivator	**Rated Top Two Box**
Had a lower price	53%
Packaging/convenience (net)	51%
Was more convenient to use/prepare	39%
Had more uniform pieces	24%
Were in smaller pieces in the package	23%
Taste (net)	50%
If it tasted better	38%
Had more recipes/serving suggestions	30%
Had more nutritional information about the product	22%

Some demographic differences are noted:

- Females and lower income respondent are more likely than counterparts to rate all the motivators top two box
- Gen X and Boomers are most concerned about price
- Respondents in three person households are most concerned about convenience and taste
- Respondents in two person households are less concerned about "more convenient to use/prepare"
- Respondents residing in the West are somewhat less likely to give a top two box score to both "if it tasted better" and "more nutritional information"