US Chicken Consumption

Final Report

Prepared For:

CRM# US3001474
July 2015
Introduction

The primary objective of this research is to analyze chicken usage and attitudes among US consumers. Specifically:

- Gauge past two week purchase frequency (from a supermarket/grocery store and food service establishments) and identify shifts in future purchase behavior
- Understand consumers’ purchase decision hierarchy
- Identify and understand consumer concerns regarding purchasing chicken
- Understand the impact of various potential product packaging claims on purchase interest
- Identify potential new product opportunities for fast food and casual dining restaurants.

A total of 1,019 interviews were conducted using ONLINE CARAVAN®, an online omnibus study conducted twice a week among a demographically representative US sample, 18+ years of age.

Statistical testing throughout this report was conducted at the 95% confidence level. Completed interviews are weighted by five variables: Age, Sex, Geographic Region, Race and Education to ensure reliable and accurate representation of the total U.S. population.

Responses gathered June 22-24, 2015

ISO 20252 Certification
ORC International is ISO 20252 certified. To achieve certification, ORC International passed a comprehensive, on-site audit. The certification establishes globally recognized terms, definitions, and service requirements for project management in research organizations. Processes outlined in ISO 20252 are designed to produce transparent, consistent, well documented and error-free methods of conducting and managing research projects. Adherence and certification to such standards provides a basis of confidence for clients and other constituencies that the work produced is being executed with quality processes and controls in place. The internationally recognized standard also provides a basis for subcontractor evaluation.
Presentation addresses high-level findings

- Identify chicken consumption frequency and assess future behavior
- Understand consumers’ purchase decision hierarchy
- Identify and understand consumer concerns regarding purchasing chicken
- Understand the impact of various potential product packaging claims on purchase interest
- Identify potential new product opportunities for fast food and casual dining restaurants.
Chicken consumption has remained consistent year-over-year.

### Chicken Consumption Frequency

**Supermarket**
- **Eaten A Chicken Meal/Snack From A Supermarket In Past 2 Weeks**
  - 2015: 85%
  - 2014: 83%
- **Average Number Of Times Eaten A Chicken Meal/Snack From A Supermarket In Past 2 Weeks**
  - 2015: 3.3
  - 2014: 3.6

**Food Service Establishment**
- **Eaten A Chicken Meal/Snack From A Food Service Establishment In Past 2 Weeks**
  - 2015: 67%
  - 2014: 70%
- **Average Number Of Times Eaten A Chicken Meal/Snack From A Food Service Establishment In Past 2 Weeks**
  - 2015: 1.8
  - 2014: 2.4

Chicken consumption has remained consistent year-over-year.
92% of consumers purchase chicken regularly.

Frequency Purchase Chicken
Base: Total (1019)

Who Purchases The Most Chicken?
- Households With 3+ People
- Females
- Consumers In The Northeast, Mid West, & South
- African Americans
85% of consumers have eaten a chicken meal or snack from a supermarket in the past two weeks.

In the past two weeks, consumers have eaten a chicken meal or snack from a supermarket 3.3 times.

23% of consumers anticipate eating MORE chicken from the supermarket in the next 12 months.

67% of consumers have eaten a chicken meal or snack from a food service establishment in the past two weeks.

In the past two weeks, consumers have eaten a chicken meal or snack from a food service establishment 1.8 times.

14% of consumers anticipate eating MORE chicken from a food service establishment in the next 12 months.

**Base:** Total (1019)

C1/2. Thinking about the meals and snacks you’ve eaten in the past two weeks, how many times did you eat chicken that was purchased from a supermarket or other retail grocery store/restaurant, fast food store, carryout shop or employee cafeteria? This includes fresh, frozen, or prepared chicken/prepared meals of chicken, chicken products/sandwiches, and similar foodservice chicken items.

C3/4. During the next 12 months, would you say that you are likely to eat more chicken, less chicken, or about the same amount of chicken that was purchased from a supermarket or other retail grocery store/restaurant, fast food store, carryout shop, or employee cafeteria?
Demographic Profile Across Key Segments

**TOTAL CHICKEN CONSUMERS (908)**

- **Gender**
  - 51% Female
  - 49% Male

- **Age** (Mean: 45.9)
  - Millennials (18-34): 31%
  - Gen X (35-49): 24%
  - Boomers+ (50+): 45%

- **Household Size** (Mean 2.8)
  - 19% One
  - 35% Two
  - 20% Three
  - 16% Four
  - 10% Five or More

- **Household Income** (Mean: $59.1K)
  - Less Than $35K: 36%
  - $35K - $50K: 16%
  - $50K - $75K: 21%
  - $75K - $100K: 13%
  - $100K Or More: 14%

- **Ethnicity (Less Diverse)**
  - 16% Hispanic
  - 13% African American

**SUPERMARKET HEAVY USERS (377)**

- **Gender (Skew Female)**
  - 54% Female
  - 46% Male

- **Age (More Millennials)** (Mean: 43.2)
  - Millennials (18-34): 35%
  - Gen X (35-49): 30%
  - Boomers+ (50+): 35%

- **Household Size (Larger Households)** (Mean 3.1)
  - 11% One
  - 33% Two
  - 22% Three
  - 22% Four
  - 13% Five or More

- **Household Income (Higher Income)** (Mean: $63.9K)
  - Less Than $35K: 34%
  - $35K - $50K: 14%
  - $50K - $75K: 22%
  - $75K - $100K: 12%
  - $100K Or More: 17%

- **Ethnicity (More Diverse)**
  - 19% Hispanic
  - 17% African American

**FOOD SERVICE ESTABLISHMENT HEAVY USERS (239)**

- **Gender (Skew Male)**
  - 44% Male
  - 56% Female

- **Age (More Millennials)** (Mean: 39.5)
  - Millennials (18-34): 44%
  - Gen X (35-49): 29%
  - Boomers+ (50+): 28%

- **Household Size (Larger Households)** (Mean 3.1)
  - 13% One
  - 29% Two
  - 21% Three
  - 24% Four
  - 12% Five or More

- **Household Income (Higher Income)** (Mean: $64.5K)
  - Less Than $35K: 36%
  - $35K - $50K: 13%
  - $50K - $75K: 22%
  - $75K - $100K: 13%
  - $100K Or More: 17%

- **Ethnicity (More Diverse)**
  - 20% Hispanic
  - 19% African American

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**TOTAL CHICKEN CONSUMERS** - Have Eaten Chicken From Supermarket Or Food Service Establishments In Past 2 Weeks

**SUPERMARKET HEAVY USERS** - Have Eaten Chicken From Supermarket 4+ Times In Past Two Weeks

**FOOD SERVICE ESTABLISHMENT HEAVY USERS** - Have Eaten Chicken From Food Service Establishments 3+ Times In Past Two Weeks

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Freshness, Price, and Taste are the most important decision factors for consumers when deciding what chicken to purchase.

### Attribute Importance For Most Recent Chicken Purchase

*Base: Purchase Chicken (982)*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Ranked #1</th>
<th>Ranked #2</th>
<th>Ranked #3</th>
<th>Ranked #4</th>
<th>Ranked #5</th>
<th>Ranked #6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshness</td>
<td>34%</td>
<td>27%</td>
<td>17%</td>
<td>11%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Price</td>
<td>27%</td>
<td>20%</td>
<td>20%</td>
<td>13%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>How Chickens Are Raised</td>
<td>13%</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Taste</td>
<td>13%</td>
<td>20%</td>
<td>20%</td>
<td>14%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Brand</td>
<td>6%</td>
<td>9%</td>
<td>10%</td>
<td>15%</td>
<td>19%</td>
<td>26%</td>
</tr>
<tr>
<td>Quantity</td>
<td>4%</td>
<td>14%</td>
<td>18%</td>
<td>22%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Packaging</td>
<td>3%</td>
<td>4%</td>
<td>8%</td>
<td>10%</td>
<td>20%</td>
<td>28%</td>
</tr>
</tbody>
</table>

C6. Thinking about your most recent chicken purchase, please rank the following factors in order of importance. Enter a 1 next to the most important factor, a 2 next to the second most important factor, a 3 next to the third most important factor, and so on.

Circles are for highlighting purposes only.
Though all tested claims pique purchase interest, consumers are most interested in eco-friendly benefits.

- Of note, *Animal-Only Antibiotics Used* is polarizing.

**Attribute Influence On Likelihood to Purchase Chicken**

*Base: Purchase Chicken (982)*

<table>
<thead>
<tr>
<th>Attribute</th>
<th>More</th>
<th>About The Same</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locally Raised</td>
<td>55%</td>
<td>40%</td>
<td>5%</td>
</tr>
<tr>
<td>Production Method Used Has Greater Sustainability For The Environment</td>
<td>39%</td>
<td>52%</td>
<td>9%</td>
</tr>
<tr>
<td>More Environmentally-Friendly Packaging</td>
<td>38%</td>
<td>56%</td>
<td>6%</td>
</tr>
<tr>
<td>Reduced Carbon Footprint For Production Method</td>
<td>30%</td>
<td>60%</td>
<td>10%</td>
</tr>
<tr>
<td>Animal-Only Antibiotics Used</td>
<td>26%</td>
<td>50%</td>
<td>24%</td>
</tr>
</tbody>
</table>

**C12.** To what degree would each of the following influence your likelihood to purchase your favorite chicken products? Would you purchase more, less, or about the same amount?
Consumers are most likely to select more flavorful, less expensive chicken over other menu items evaluated.

*Likelihood To Purchase Chicken Products Instead Of Other Menu Items*

*Base: Purchase Chicken (982)*

- **Only White Meat**: 25% Extremely Likely, 27% Very Likely, 31% Somewhat Likely, 10% Not Very Likely, 7% Not At All Likely
- **A Salad**: 19% Extremely Likely, 30% Very Likely, 31% Somewhat Likely, 11% Not Very Likely, 10% Not At All Likely
- **More Robust In Flavor**: 17% Extremely Likely, 36% Very Likely, 35% Somewhat Likely, 6% Not Very Likely, 6% Not At All Likely
- **More Economical**: 16% Extremely Likely, 33% Very Likely, 39% Somewhat Likely, 7% Not Very Likely, 5% Not At All Likely
- **A Sandwich**: 15% Extremely Likely, 31% Very Likely, 40% Somewhat Likely, 8% Not Very Likely, 6% Not At All Likely
- **A Finger Food, Like Nuggets Or Strips**: 15% Extremely Likely, 23% Very Likely, 36% Somewhat Likely, 16% Not Very Likely, 9% Not At All Likely
- **Only Dark Meat**: 8% Extremely Likely, 13% Very Likely, 30% Somewhat Likely, 26% Not Very Likely, 23% Not At All Likely
- **Breakfast Sausage**: 7% Extremely Likely, 14% Very Likely, 28% Somewhat Likely, 27% Not Very Likely, 23% Not At All Likely

C13. Thinking about new chicken products you would like to see offered at your favorite fast food or casual dining restaurants, how likely would you be to purchase each of the following chicken products rather than other items on the menu if the new chicken product was…?

Circles are for highlighting purposes only.
Chicken Purchase Concerns
While three in ten (29%) consumers have no concerns about purchasing chicken, others are most likely to be concerned about product freshness and health/safety.

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product</strong></td>
<td>40%</td>
</tr>
<tr>
<td>Freshness/expiration date/if it is old</td>
<td>27%</td>
</tr>
<tr>
<td>Organic/natural/non-GMO</td>
<td>3%</td>
</tr>
<tr>
<td>Taste</td>
<td>3%</td>
</tr>
<tr>
<td>Quality</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Health/Safety</strong></td>
<td>26%</td>
</tr>
<tr>
<td>Drugs/Chemicals (Subnet)</td>
<td>9%</td>
</tr>
<tr>
<td>Hormones/steroids</td>
<td>5%</td>
</tr>
<tr>
<td>Antibiotics</td>
<td>3%</td>
</tr>
<tr>
<td>Bacteria (Subnet)</td>
<td>6%</td>
</tr>
<tr>
<td>Salmonella</td>
<td>4%</td>
</tr>
<tr>
<td>Disease (Subnet)</td>
<td>3%</td>
</tr>
<tr>
<td>Treatment of Chicken</td>
<td>9%</td>
</tr>
<tr>
<td>How they were raised/treated/raised humanely</td>
<td>5%</td>
</tr>
<tr>
<td>Price</td>
<td>5%</td>
</tr>
<tr>
<td>None</td>
<td>29%</td>
</tr>
</tbody>
</table>

71% of consumers have concerns

C7. What concerns, if any, do you have when purchasing chicken? Please be as specific as possible. Only comments mentioned by 3% or more are shown.
When prompted, the majority of consumers have concerns about the chicken they purchase, especially regarding **Food Safety**.

### Chicken Purchase Concerns

*Base: Purchase Chicken (982)*

<table>
<thead>
<tr>
<th>Category</th>
<th>Extremely Concerned</th>
<th>Very Concerned</th>
<th>Somewhat Concerned</th>
<th>Not Very Concerned</th>
<th>Not At All Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Safety</td>
<td>41%</td>
<td>30%</td>
<td>19%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Disease</td>
<td>39%</td>
<td>22%</td>
<td>21%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>Hormone And Steroid Use</td>
<td>30%</td>
<td>25%</td>
<td>24%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Antibiotic Use In Chickens</td>
<td>28%</td>
<td>22%</td>
<td>29%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Confusing/Misleading Packaging/Label Claims</td>
<td>22%</td>
<td>27%</td>
<td>28%</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>How Chickens Are Raised</td>
<td>21%</td>
<td>22%</td>
<td>28%</td>
<td>18%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Responses to the open ended follow-up questions can be found in the report appendix and are best utilized as an opportunity to understand the verbiage respondents associate with these categories.
Eight in ten (80%) of consumers state that they would seek information to assuage their chicken concerns. Websites are the most popular information sources.

**Likelihood To Seek Information**

**Base: Purchase Chicken (982)**

- Extremely Likely: 20%
- Very Likely: 30%
- Somewhat Likely: 30%
- Not Very Likely: 11%
- Not At All Likely: 3%
- No Concerns: 6%

**Chicken Information Sources**

**Base: Purchase Chicken & Likely To Seek More Info About The Chicken They Buy (780)**

- USDA/Other Government Website: 60%
- Brand/Company Website: 38%
- Grocer/Butcher At Store: 34%
- Grocery Store/Retail Website: 24%
- Blogs: 15%
- Physician/Healthcare Provider: 9%
- Celebrity Health Expert: 4%
- Celebrity Chef: 3%
- Other: 5%

C10. If you have concerns, how likely would you be to seek more information about the chicken you buy?
C11. Where would you go for this information about the chicken you buy?

Circles are for highlighting purposes only.
Insights & Implications
Insights & Implications

<table>
<thead>
<tr>
<th>Insight</th>
<th>Implication</th>
</tr>
</thead>
</table>
| Chicken consumption is ubiquitous and has remained flat year-over-year.| With consumption at this high level, focus marketing efforts on:  
  • increasing individual chicken consumption.  
  • encouraging diversity of chicken products in the market  
  • promoting additional usage occasions. |
| Basic, functional benefits including *Freshness, Price,* and *Taste* rank highest on consumers’ purchase decision hierarchy. *Freshness* is also most often cited as a consumer concern. | Packaging labeling and claims focused on communicating and insuring product freshness will likely be most impactful. |
| Eco-friendly benefits appear to significantly increase purchase interest. Consumers are most interested in understanding where their chicken comes from. | Consider adding *Locally Raised* (when appropriate) |
| Concerns regarding product freshness and health/safety are top of mind for approximately one in four consumers. Consumers are most likely to use the *USDA website* or a *Brand/Company Website* to find more information about the chicken they buy. | Consider encouraging chicken product manufacturers to add more information regarding safe product handling and health/safety tips to their websites. |
| Supermarket Heavy Users and Food Service Establishment Heavy Users skew younger and more diverse with larger households. | Consider targeted marketing efforts towards Millennials, consumers with larger households, as well as Hispanics and African Americans. |
US Chicken Consumption


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### Demographics

#### Gender
| Male    | 48% |
| Female  | 52% |

#### Age
| 18-24   | 13% |
| 25-34   | 18% |
| 35-44   | 17% |
| 45-54   | 18% |
| 55-64   | 17% |
| 65 or older | 19% |
| Mean    | 46.3 |

#### Education
- High School Graduate Or Less: 42%
- Some College/Technical School: 28%
- College Graduate: 30%

#### Employment Status
- Employed: 55%
- Student: 5%
- Homemaker: 7%
- Retired: 21%
- Not Employed Currently/Unable To Work: 12%

#### Region
- North East: 18%
- Midwest: 21%
- South: 37%
- West: 23%

#### Marital Status
- Married: 46%
- Living With A Partner: 10%
- Single/Never Been Married: 28%
- Separated/Divorced/Widowed: 15%

#### Household Income
- Less than $35,000: 37%
- $35,000 - less than $50,000: 17%
- $50,000 - less than $75,000: 21%
- $75,000-$99,999: 12%
- $100,000 or more: 14%
| Mean (in Thousands) | 59 |

#### Ethnicity
- White: 76%
- Hispanic: 15%
- Black Or African-American: 13%
- Native American Or Alaska Native: 2%
- Asian: 5%
- Other: 5%

#### Home Ownership
| Own    | 62% |
| Rent   | 38% |

#### Household Size
| One    | 24% |
| Two    | 50% |
| Three  | 17% |
| Four   | 6%  |
| Five or more | 2%  |
| Mean   | 2.1 |