

Consumer Preferences For New Foodservice Chicken Products Survey Results 2011

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WATT Poultry USA and
Givaudan Flavors

Chicken Marketing Seminar 2011

Tuesday, July 19, 2011
Resort at Squaw Creek
Lake Tahoe, California

Givaudan[®]

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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.**
- **Consumer preferences for new foodservice chicken products.**
- **Consumer frequency of on-line inquiries about chicken.**

Survey Basics

- **Survey was conducted by PKS Research Partners**
- **1,050 household from pre-screened panel contacted on-line June 2, 3, 4, and 5.**
- **Respondents 18 years of age and older**
- **51.5 % females, weighted**
- **48.5 % males, weighted**

Survey Basics

Regional Distribution of Respondents (weighted):

<u>Region</u>	<u>Percent</u>
<u>New England</u>	<u>4.1</u>
<u>Mid Atlantic</u>	<u>14.3</u>
<u>East North Central</u>	<u>15.1</u>
<u>West North Central</u>	<u>6.9</u>
<u>South Atlantic</u>	<u>21.6</u>
<u>East South Central</u>	<u>4.8</u>
<u>West South Central</u>	<u>10.5</u>
<u>Mountain</u>	<u>7.9</u>
<u>Pacific</u>	<u>14.8</u>
<u>Total</u>	<u>100</u>

Survey Basics

Race of Respondents (weighted)

Race	Percent
White (non-Hispanic)	67
Hispanic	14
Black (non-Hispanic)	12
Other	7
Total	100

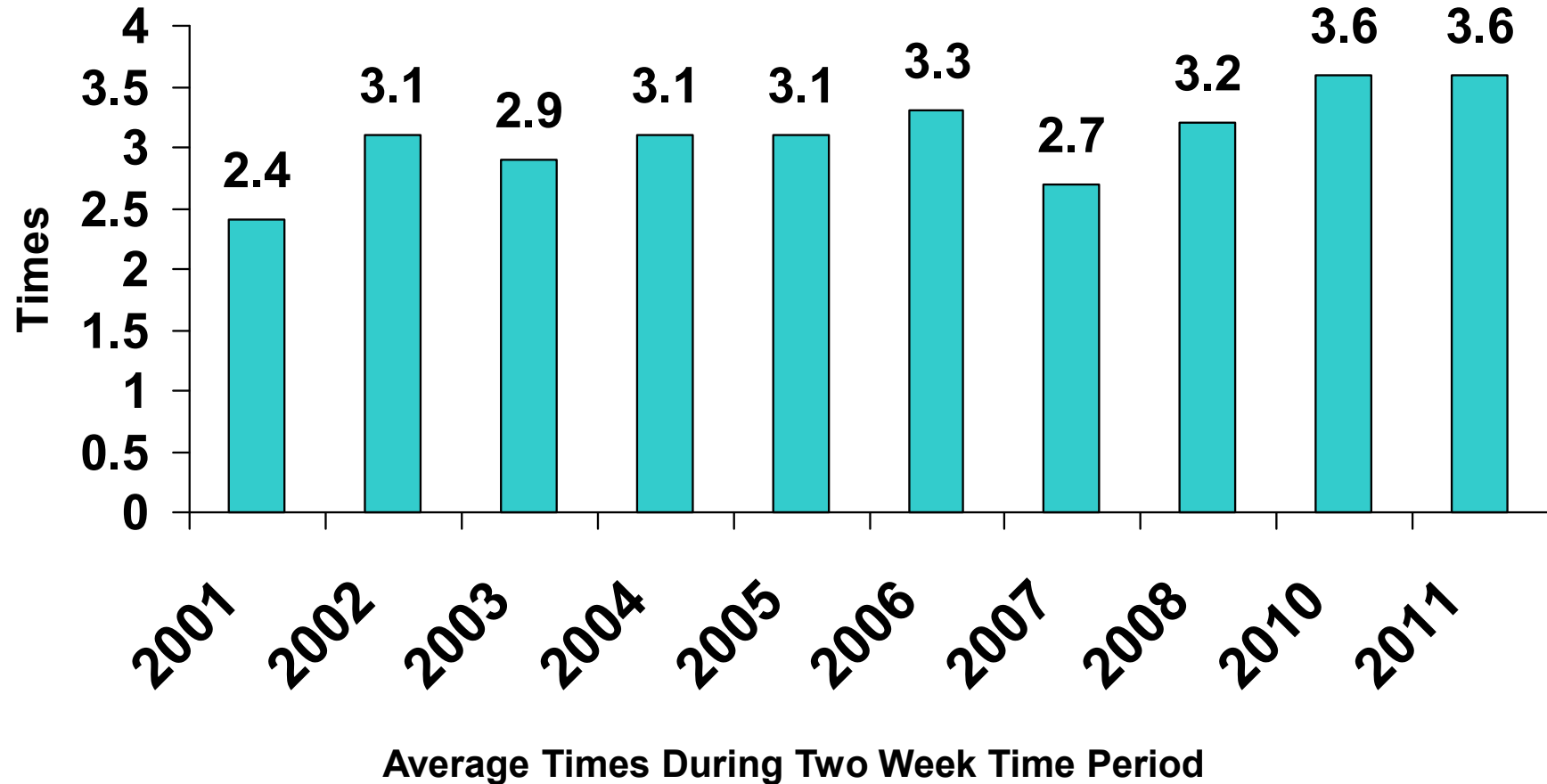
Question 1

- **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

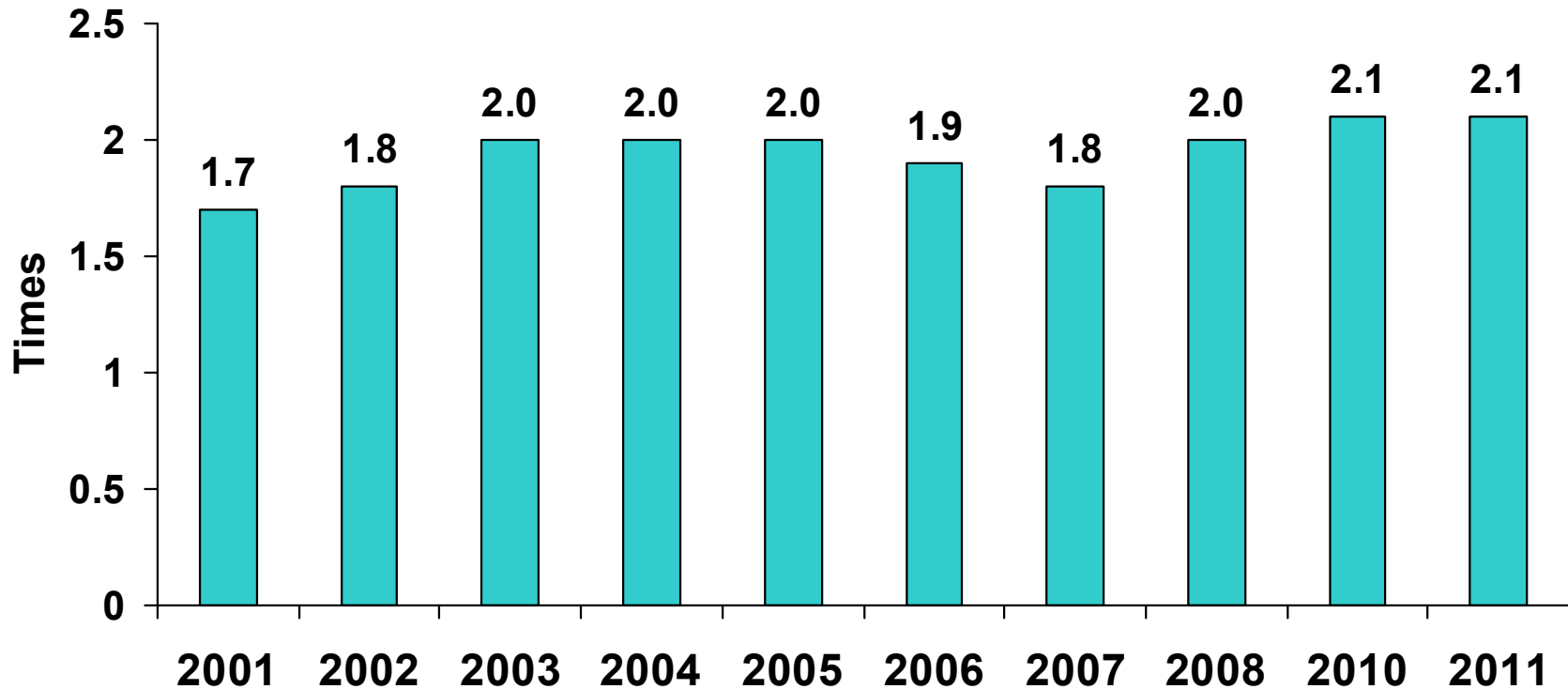
- **Thinking about the meals and snacks you've eaten in the past two weeks, how many times did you eat chicken that was purchased at a restaurant, fast food store, carryout shop or employee cafeteria? (Prepared meals of chicken, chicken products/sandwiches, and similar foodservice chicken items are included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



Average Times During Two Week Time Period

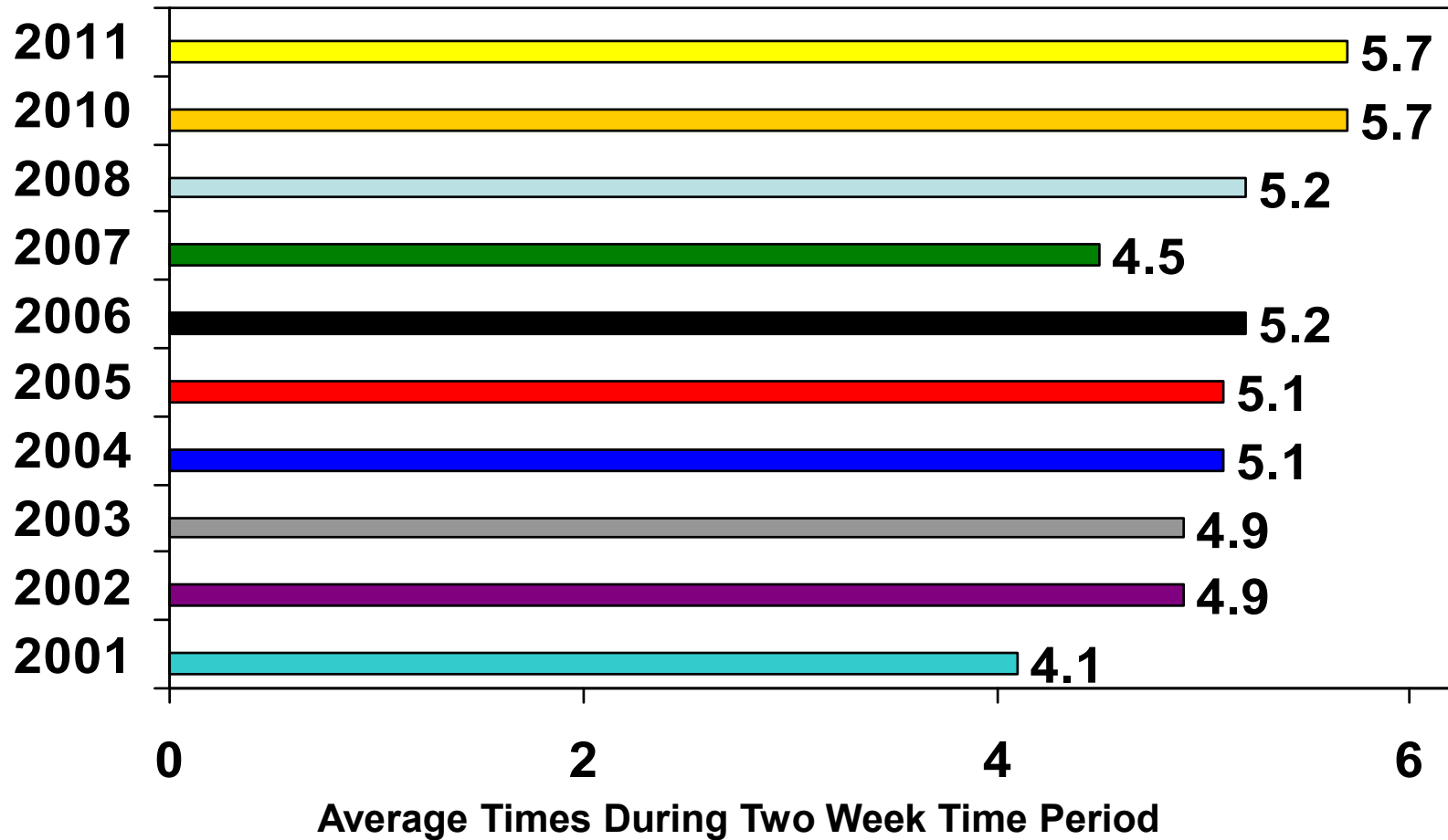
Note: Frequency includes all respondents whether they ate chicken or not during the two week time period.

Combined Frequency of Eating Chicken

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

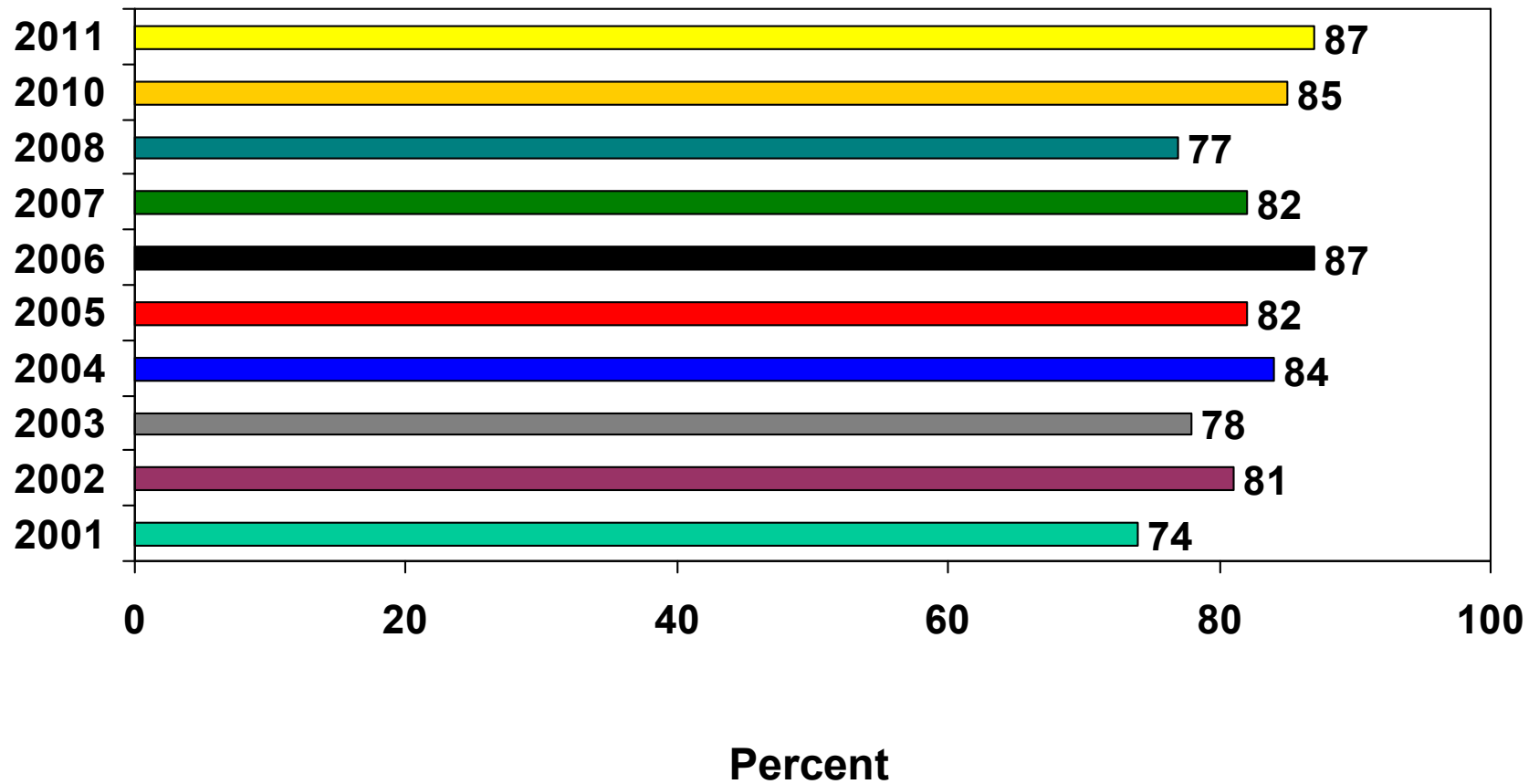
Note: Frequency includes all respondents whether they ate chicken or not during the two week time period.

Combined Frequency of Eating Chicken Purchased From Retail Grocery and Foodservice

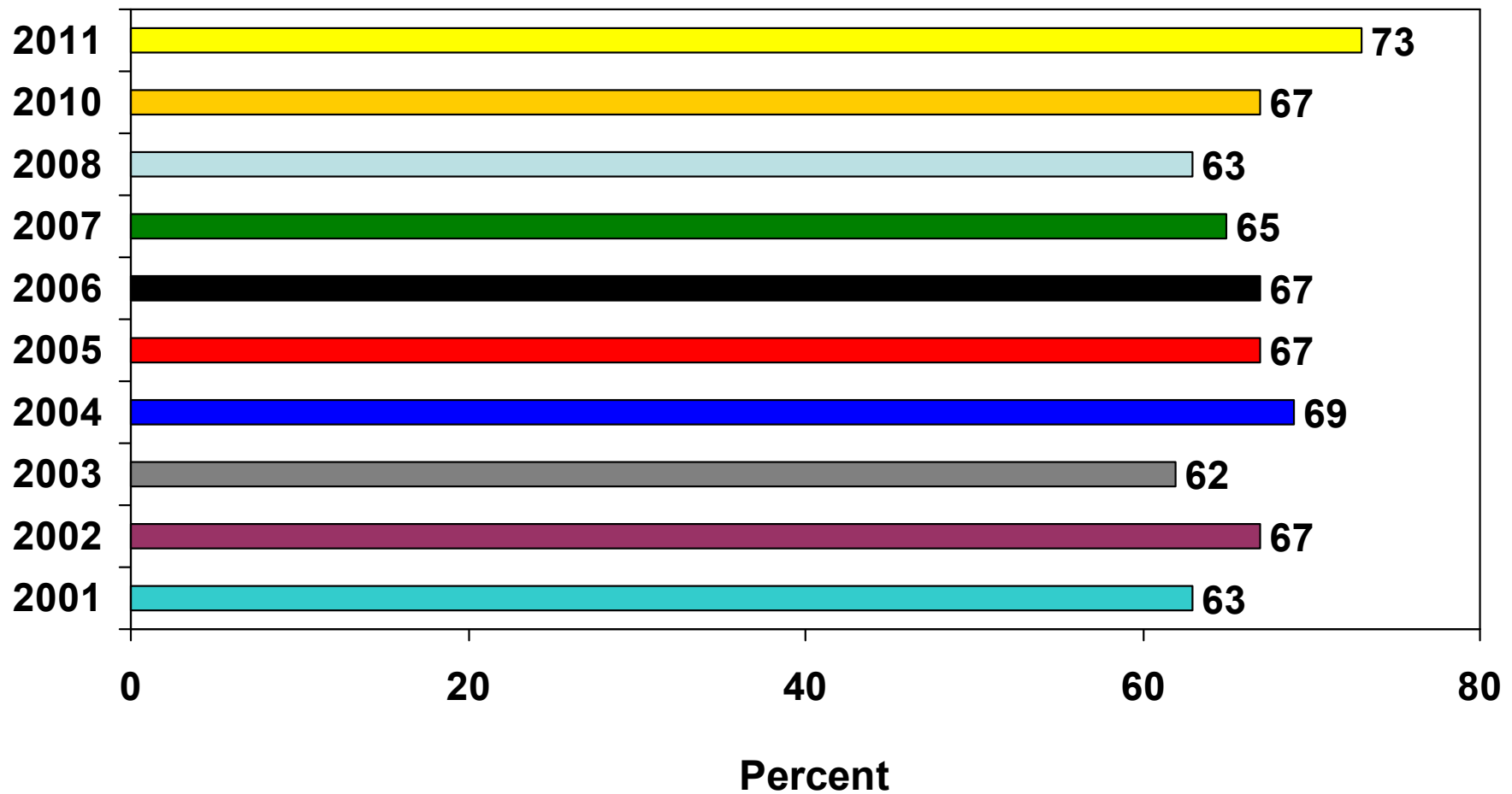


Note: Combined frequency includes all respondents whether they ate chicken or not during two week time period.

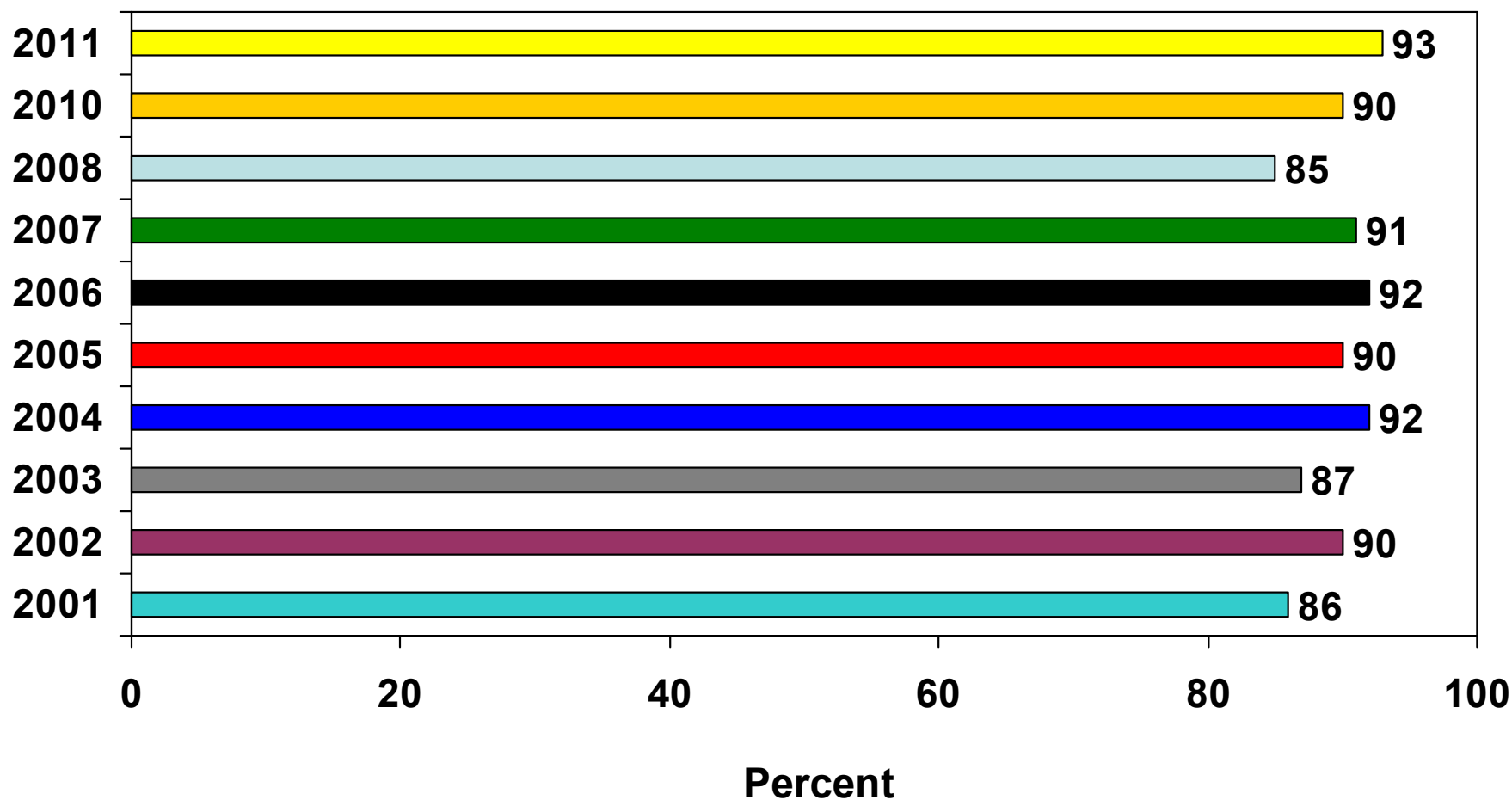
Share of Consumers Eating Chicken Purchased From Retail Grocery During Two Week Time Period



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
Year		-----Times-----				
(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
(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
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

Share of Generational Group Eating Chicken During Two Week Time Period, 2011

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

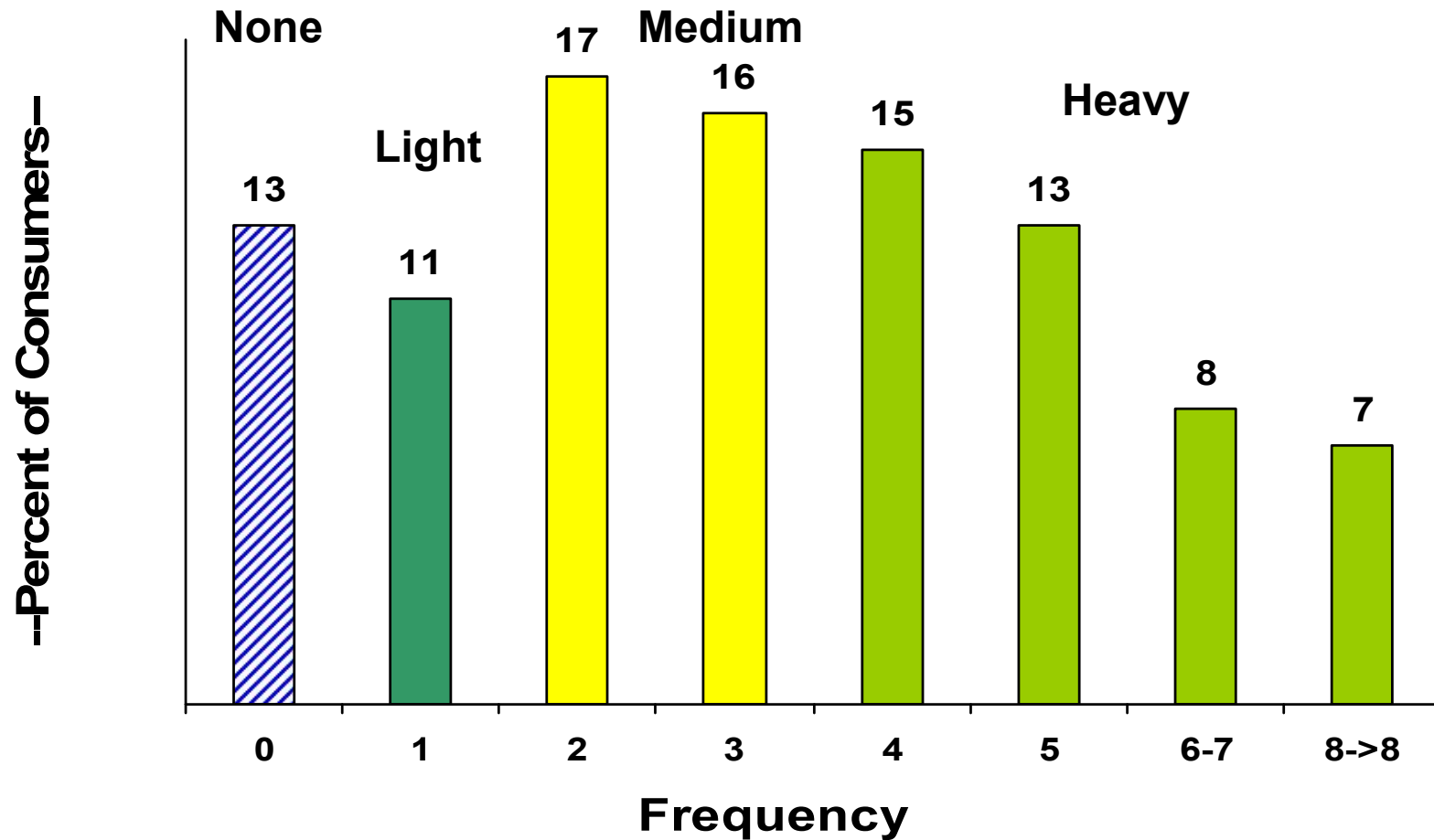
Frequency of Eating Chicken by Demographic Group During Two Week Time Period, 2011

		Demographic Group				
		Any Hispanic	Black Only (Non- Hispanic)	White Only (Non- Hispanic)	All Others	All Respondents
Year	-----Times-----					
(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
(B) Chicken Purchased at Foodservice	2010	2.9	2.2	1.8	3.1	2.1
	2011	3.2	2.5	1.8	3.2	2.1
Combined A & B	2010	6.9	6.3	5.2	6.9	5.7
	2011	7.3	7.1	5.1	6.8	5.7

Share of Demographic Group Eating Chicken During Two Week Time Period, 2011

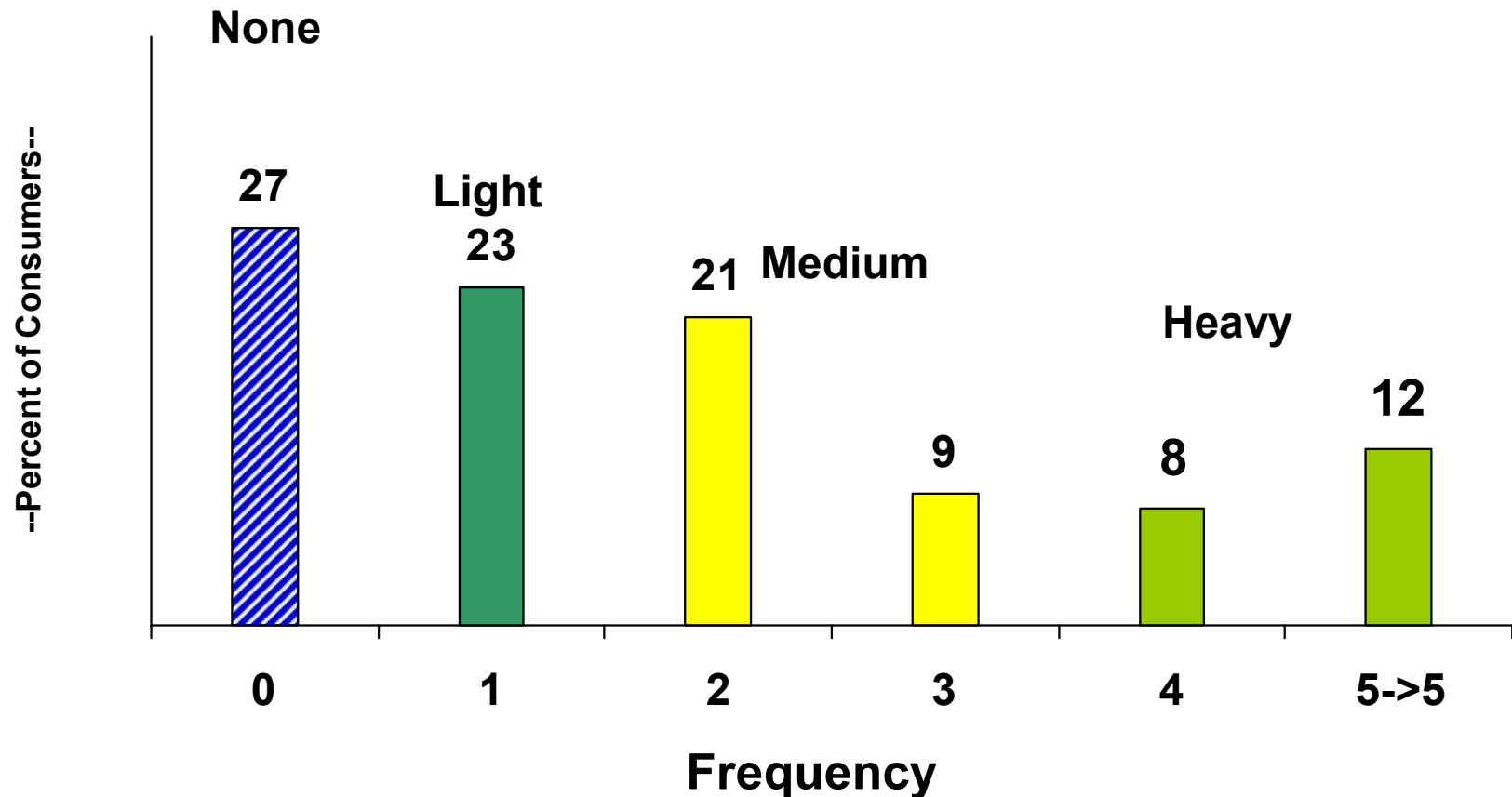
		Demographic Group				
		Any Hispanic	Black Only (Non- Hispanic)	White Only (Non- Hispanic)	All Others	All Respondents
		-----Percent-----				
	Year					
(A) Chicken Purchased at Retail Grocery	2010	90	89	83	91	85
	2011	95	89	86	85	87
(B) Chicken Purchased at Food- service	2010	79	76	62	80	67
	2011	83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

Frequency of Eating Chicken Purchased at Supermarket/Retail Grocery (Times During Past Two Weeks/2011)



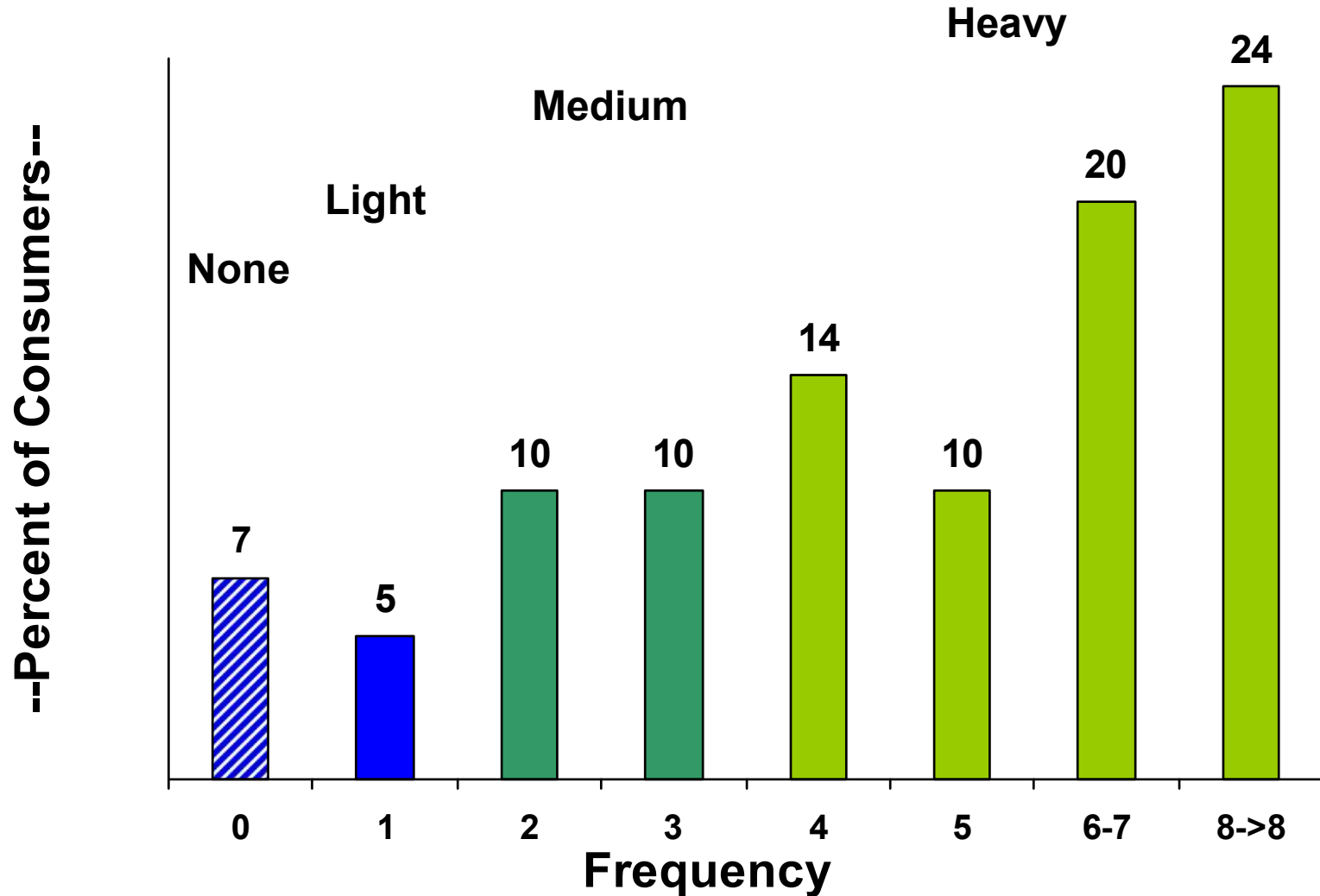
Average times including none: 3.6
Average times excluding none: 4.1

Frequency of Eating Chicken Purchased from Foodservice (Times During Two Weeks/2011)



Average times including none: 2.1
Average times excluding none: 2.9

Responses for Eating Chicken from Retail Grocery and Foodservice Combined (Times During Two Weeks/2011)



Average times including none: 5.7

Average times excluding none: 6.2

Question 3. Thinking about new chicken products you would like to see offered at your favorite fastfood or casual dining restaurants, how likely would you be to purchase the following chicken products rather than other items on the menu?

If the new Chicken <u>Product Was:</u>	Extremely Likely	Very Likely	Somewhat Likely	Not Very Likely	Not at all Likely
More economical					
More robust in flavor					
Only white meat					
Only dark meat					
A sandwich					
A salad					
A finger food, like nuggets or strips					
Breakfast sausage					

Likelihood Consumers Would Purchase New Chicken Product Rather than Other Menu Item at Their Favorite Fast Food or Casual Dining Restaurant, 2011

<u>New Product</u>	Respondents Indicating Extremely Likely/Very Likely (Combined)	Not Very Likely/Not At All Likely (Combined)
	----- Percent -----	
Salad	56	19
Only White Meat	55	18
More Robust In Flavor	52	16
A Sandwich	51	17
More economical	49	18
A Finger Food, Like Nuggets/Strips	40	29
Only Dark Meat	22	55
Breakfast Sausage	19	56

Likelihood Consumers Would Purchase New Chicken Product Rather than Other Menu at their Favorite Fastfood or Casual Restaurant by Age, 2011

Respondents Indicating Extremely Likely/Very Likely
(Combined)
Years of Age

New Product	18-24	25-34	35-44	45-64	65+	Total
	<i>Percent</i>					
A salad	53	54	64	52	60	56
Only white meat	52	58	64	49	56	55
More robust flavor	55	55	60	49	46	52
A sandwich	63	56	60	44	43	51
More economical	48	46	62	44	48	49
A finger food, like nuggets or strips	47	52	49	30	32	40
Only dark meat	29	21	26	18	19	22
Breakfast sausage	31	25	25	11	15	19

Likelihood Consumers Would Purchase New Chicken Product Rather than Other Menu at their Favorite Fastfood or Casual Restaurant by Region, 2011

Respondents Indicating Extremely Likely/Very Likely (Combined) by Region

New Product	Northeast	Midwest	South	West	Total
	----- <i>Percent</i> -----				
A salad	55	51	57	60	56
Only white meat	57	51	60	49	55
More robust flavor	54	50	56	46	52
A sandwich	46	51	56	47	51
More economical	51	48	48	48	49
A finger food, like nuggets or strips	42	33	43	39	40
Only dark meat	25	17	22	24	22

Question 4. Approximately how many times during the past four weeks have you used any websites, social networking sites, blogs, other internet sources, or have searched on-line to get information about chicken or to obtain coupons to purchase chicken?

Please include going on-line to websites, searching for information about purchasing, handling, preparing, cooking, serving instructions, other information about chicken, recipes, special offers, coupons or other incentives to purchase chicken. This would include but not be limited to: Facebook, Twitter, Four Square, Yelp, food companies websites, chicken restaurant websites, etc.

Frequency During the Past Four Prior to Weeks June 2011 Respondents Used Websites, Social Networking Sites, Blogs, Other Internet, and On-line Sources for Information about Chicken, Obtain Coupons, and Similar Activities for Chicken

Frequency During Past Four Weeks	Share of Respondents %
1	7
2	7
3	3
4	3
5	2
6	1
7	-
8	-
9	-
10	2
11 or more	5
0	70
Mean including zero	2.6
Mean excluding zero	8.5

Frequency During the Past Four Weeks Prior to June 2011, Respondents Used Websites, Social Networking, Blogs, Other Internet, and On-line Sources for Information about Chicken, Obtain Coupons, and Similar Activities for Chicken as Related to Usage of Chicken

Chicken Usage in two weeks	Usage of Chicken at- Home	Usage of Chicken Away-from-Home	Total Chicken Usage
<i>----- Average times during four weeks -----</i>			
Heavy (4 +)	3.8	5.0	3.5
Medium (2-3)	2.5	2.8	0.8
Light (1)	0.6	2.1	1.0
None (0)	0.4	0.9	0.1

Mean Including Zero: 2.6 / Mean Excluding Zero: 8.5

Frequency During the Past Four Weeks Prior to June 2011, Respondents Used Websites, Social Networking, Blogs, Other Internet, and On-line Sources for Information about Chicken, Obtain Coupons, and Similar Activities for Chicken as Related to Generation

	Millennials (18-34 Years of Age)	Generation X (35-44 years of age)	Boomers (45-64 years of age)	Greatest Generation (65+ years of age)
<i>----- Average times during four weeks -----</i>				
Mean Including Zero	5.7	2.5	0.9	0.6
Mean Excluding Zero	12.8	6.4	4.5	3.6
<i>----- Percent -----</i>				
Did use at least once	44	38	20	17

Frequency average including zero: 2.6
 Frequency average excluding zero: 8.5
 Respondents using on-line for chicken at least once: 30 percent

The Following Summary Was

Prepared by Paul Prekopa

President of PKS Research Partners

June, 2011

For more information about the 2011 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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