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Chicken Meat Usage and Attitude Survey

by Colmar Brunton

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Foreword

This report provides a comprehensive knowledge of current consumer usage and attitudes toward chicken within its comparative set to understand consumer requirements and trends, and to inform industry's decision making and marketing activities.

It is an addition to RIRDC's diverse range of over 1800 research publications and forms part of our Chicken Meat R&D program which aims to support increased sustainability and profitability in the chicken meat industry through focused research and development.

Most of RIRDC's publications are available for viewing, downloading or purchasing online at www.rirdc.gov.au. Purchases can also be made by phoning 1300 634 313.

Peter O'Brien
Managing Director
Rural Industries Research and Development Corporation

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Executive Summary

What the report is about

RIRDC is interested in understanding consumer usage and attitudes towards chicken meat and competing food products. This is important for the industry and will allow for greater management and refinement of its products, practices and especially research and development to better meet consumer expectations. This report contains the findings of a chicken meat usage and attitude study.

Who is the report targeted at?

The report is targeted toward RIRDC and all relevant chicken meat industry partners.

Background

In its Five-Year R&D Plan the RIRDC Chicken Meat Program has identified undertaking regular assessment of consumer perceptions of industry practices and products as a key strategy for meeting the RIRDC Chicken Meat Program goals and as a measurement tool of the industry's marketing, promotional and research programs.

Aims/objectives

The broad aim of the research was to provide RIRDC with a comprehensive knowledge of current consumer usage and attitude of chicken within its competitive set.

Methods used

Colmar Brunton was commissioned to conduct a four stage study of Australian grocery buyers. This involved an online consumer blog, a CATI Scoping of Incidence Survey, Online Usage and Attitudes Survey and an Online Consumer Consumption Diary.

Results/key findings

Chicken and beef continue to dominate consumption in the protein category – however consumption for the category is increasing across the board.

94% of the population are currently open to the consumption of chicken – highest in the category. Chicken and beef each comprise approximately one quarter of main meal proportions eaten within the past month in home, with Lamb and Fish at significantly lower levels.

Chicken consumption frequency as a main meal has *not* significantly changed since 1998 with more than 8 out of 10 main grocery buyers having eaten chicken as a main meal within the past week in home.

Consumption within the past week of Lamb, Fish and Seafood other than fish has increased significantly since 1998 while meals without meat on the other hand have decreased significantly at a national level.

Chicken is primarily purchased as an automatic choice because of its popularity in the household, especially amongst children. It is considered to be a food that can be consumed often, and of value for money. Unlike other players in the market, chicken is not currently strongly associated with any health platforms in the market.

Chicken concerns are prevalent in the market however are not motivating enough for a radical change in purchase behaviour. These issues include antibiotics, the (incorrectly) perceived use of steroids and hormones, animal welfare and safe food handling. At least one quarter of respondents stated that these concerns did not influence they way they shop and buy chicken.

Recommendations

- Chicken requires a central communication/positioning platform.
- It is important to maintain the relevance and visibility of the current motivators for chicken purchase: versatility, liked by children, quick and easy to prepare, and price.
- Communication will be required to overcome the myths associated with chicken such as animal welfare issues, perceived use of hormones and steroids, and an understanding of free-range and organic.
- Australian produced was found to be motivating for chicken purchase.
- Chicken needs to be seen and heard using the most commonly referred to sources that influence meat choices: cookbooks, TV chefs and friends, family and colleagues.
- The most credible sources were considered to be government agencies, nutritionists and dieticians.

1. Introduction

The RIRDC Chicken Meat Program funds research and development relevant to the chicken meat industry nationally. The objective of the Program is, through carefully focused R&D, to support increased sustainability and profitability in the chicken meat industry.

Key goals of the Chicken Meat Program are to:

- understand consumer requirements and trends, and
- inform industry decision making and marketing activities.

In its Five-Year R&D Plan the RIRDC Chicken Meat Program has identified undertaking regular assessment of consumer perceptions of industry practices and products as a key strategy for:

- meeting RIRDC Chicken Meat Program twin goals as above, and
- a measurement tool of the industry's marketing, promotional and research programs.

Understanding consumer usage and attitudes towards chicken meat and competing food products is important for the industry to be able to manage and refine its products and practices to better meet consumer expectations, and therefore to better target its research activities. The last industry wide assessment of consumer usage and attitudes to chicken meat was conducted in 1998. That study was funded by RIRDC. Individual chicken meat producing companies have also undertaken market surveys of chicken meat usage and attitude however, and the most recent of these was in 2006.

The RIRDC Chicken Meat Program therefore commissioned a project to survey the current consumer usage of and attitudes towards chicken meat and of its competitors. Colmar Brunton undertook this project.

The aims of the project were to:

- Gain a comprehensive knowledge of current consumer usage and attitudes of chicken within its competitive set.
- Provide information and benchmarks for RIRDC to:
  - measure the industries marketing, promotional and research programs, and
  - identify any changes in attitudes and usage patterns that have occurred over the past 10 years.
- Empower RIRDC with consumer insights towards increasing share of chicken in the market, in order to drive category growth, by:
  - increasing consumption amongst current users, and
  - targeting lapsed users.

2. Methods

Colmar Brunton was commissioned to conduct a four stage study of Australian grocery buyers:

- Stage 1 was an online consumer blog based on 53 respondents conducted nationally and was used to ensure themes captured in subsequent instruments were contemporary.
- Stage 2 was a CATI Scoping of Incidence Survey based on 801 telephone interviews conducted Australia wide among main grocery buyers aged 18 years and over and nationally representative.
- Stage 3 was an Online Usage & Attitudes Survey based on 1,204 respondents conducted in Sydney and Melbourne among main grocery buyers aged 18 years and over. Data was post weighted to reflect population incidence figures obtained in Stage 2. Quotas were enforced for representation across heavy, medium, light and lapsed chicken users.
- Stage 4 was an Online Consumer Consumption Diary based on 707 respondents who were a subset of respondents from Stage 3, with representation across heavy, medium and light consumers.

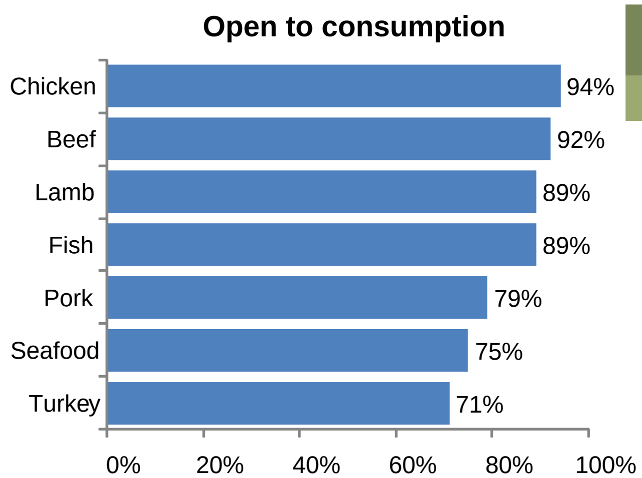
All fieldwork was carried out between May–July 2008

3. Results

3.1 Chicken Consumption

Key Findings

- Chicken and beef continue to dominate category consumption.
- Chicken (94%) and beef (92%) are well penetrated in market with the large majority of the population open to consumption. One fifth or more were not open to eating pork, seafood or turkey.
- Within past week, chicken (81%) and beef (80%) consumption were highest in home as a main meal. Lamb (54% c.f. 46%), pork (34% c.f. 29%) and seafood (31% c.f. 27%) have all displayed significant increase since 1998.
- Chicken is most frequently consumed in home as a main meal (2.4 times per week). Heavy chicken users are consuming chicken more than 5 times per week as a main meal in home.

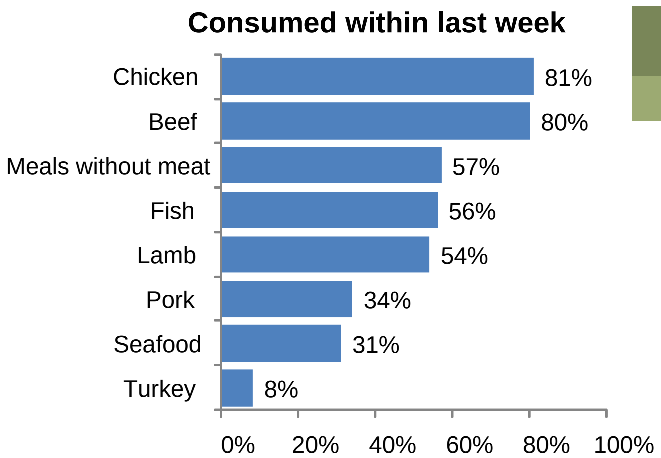


Heavy n=273	Medium n=418	Light n=446	Lapsed n=67
100%	98%	98%	11%

Base: Total Respondents N=1204

Q: Which of the following are you currently open to eating?

Figure 1. Food types open to eating

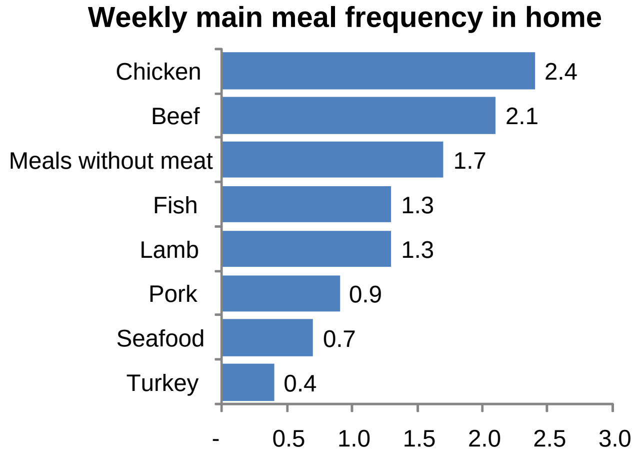


Heavy n=273	Medium n=418	Light n=446	Lapsed n=67
95%	93%	74%	8%

Base Total Respondents N=1204

Q: When was the last time you yourself ate each of the following foods as port of a main meal?

Figure 2. Food types consumed within the last week



Heavy n=273	Medium n=418	Light n=446	Lapsed n=67
5.3	2.5	0.9	0.3

Base: Total Respondents N=1204 Q: How often would each of the following foods be served as part of a main meal in your household?

Figure 3. Frequency of consumption as a main meal

3.2 Drivers for Consumption

A driver analysis was conducted to understand key drivers across the category for consumption.

The driver analysis correlated key statements within the category against how often the food is served as part of a main meal in the respondents' household.

Key Findings

- Routine purchase, popularity and value for money are key drivers for chicken consumption, however a health platform is not apparent.
- Key consumption drivers for chicken centre around habitual purchase, popularity – both in household and amongst children – and value for money. Chicken was not primarily consumed for any health benefits as these were owned primarily by other players in the market. When compared with 1998, a consistency is evident in that chicken is still primarily consumed due to its convenience rather than for dietary concerns.
- Beef, lamb and pork were largely considered good sources of iron, a mans meal, sources of protein, offered a variety of cuts, more likely to be Australian produced and offered a lower risk in getting ill from eating it.
- Fish and seafood were considered a good source of omega 3, lower in cholesterol and to have less 'bad' fats. They were not necessarily considered good value for money or cheap.

NB: Interpreting profiles – the width of the profile is a key indication of how strongly a product is associated with a statement when compared with the competitive set. The chicken consumption profile is split by heavier consumers (more than once a week) and lighter consumers (less than once a week).

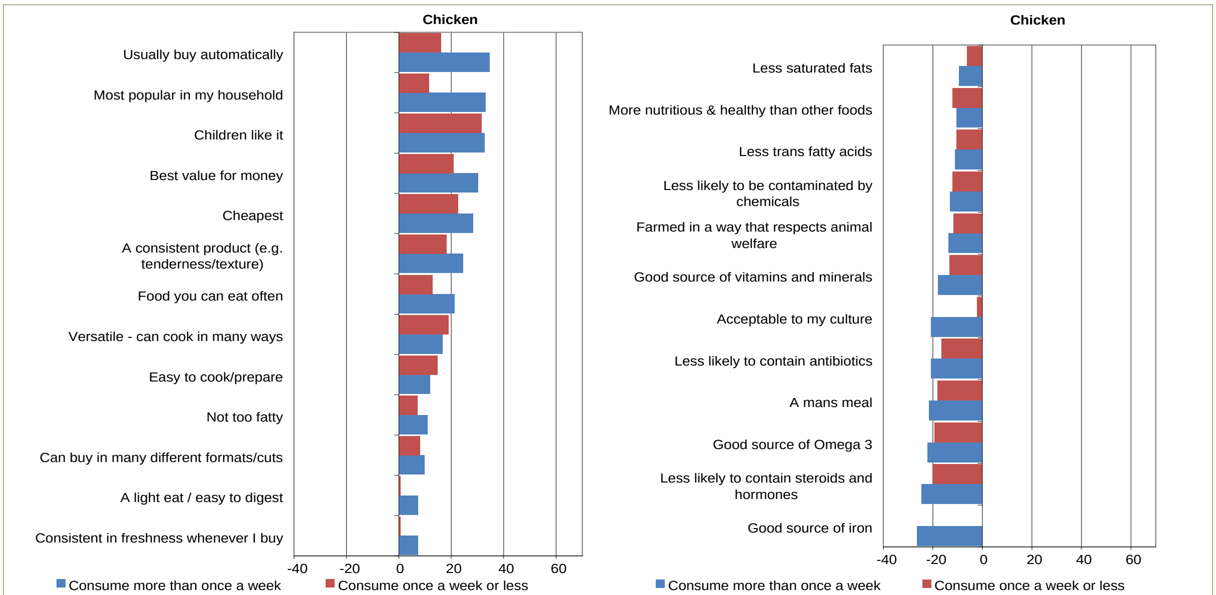


Figure 4. Key drivers for chicken consumption

NB: Interpreting correspondence maps – When interpreting the map, a key consideration is the percentage explained by each axis. This details how much each axis accounts for the differences in the products. In our example the horizontal x-axis accounts for 61.24% of the difference between the brands, and the y-axis explains a further 17.66%. Therefore, the map explains 77.9% of the overall differences between the products. Statements falling on the outer edges of the map indicate a high degree of differentiating power, while those lying closer to the middle have less.

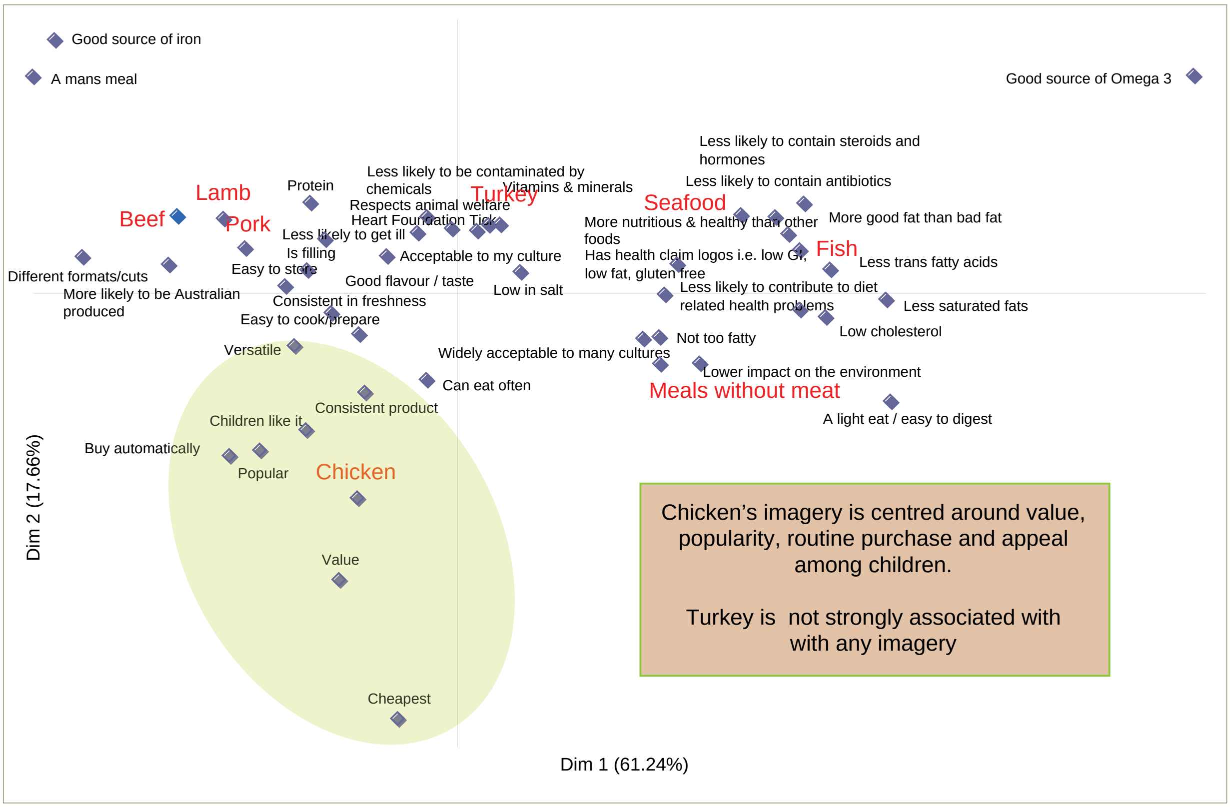
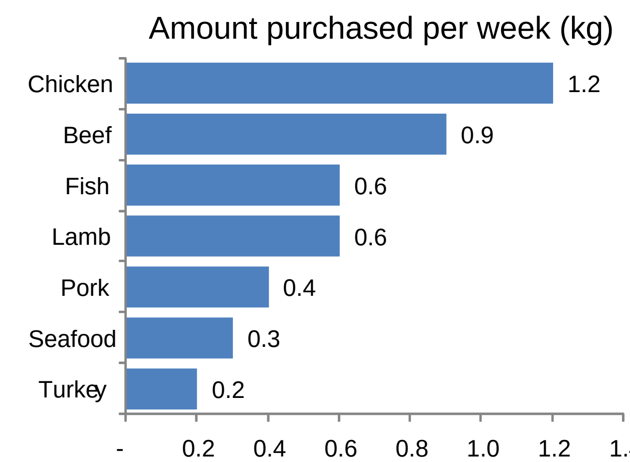


Figure 5. Chicken and turkey in the competitive set

3.3 Purchasers of meat types

Key Findings

- Heavy chicken users also purchased significantly more fish, pork, seafood and turkey per week.
- Heavy chicken users also spent significantly more on seafood, pork and turkey – in addition to chicken.
- Fresh chicken on average was purchased once a week, while other types of meat were purchased once a fortnight.
- Chicken breasts were the most frequently purchased cut of fresh chicken.



Heavy n=273	Medium n=418	Light n=446	Lapsed n=67
1.7	1.3	0.9	0

Base: Total Respondents N=1204 Q: During an average week, how much would typically be purchased of each of the following for your household?

Figure 6. Amount purchased per week (kg)

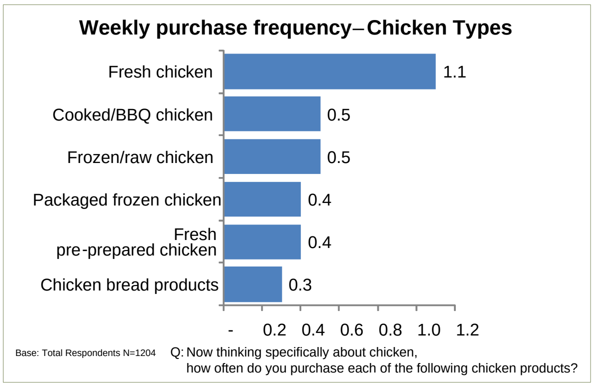


Figure 7. Weekly purchase frequency of chicken types

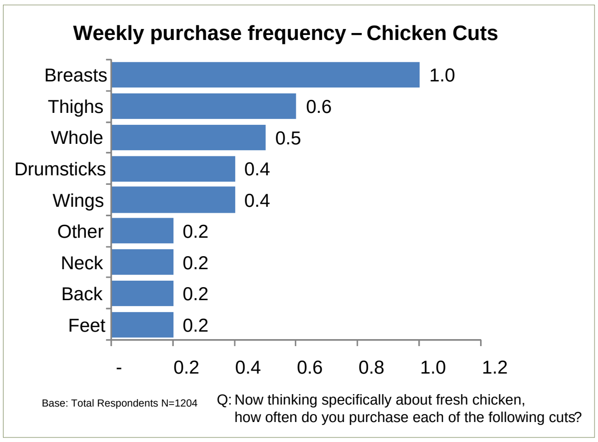


Figure 8. Weekly purchase frequency of chicken cuts

3.4 Specialised chicken products

Key Findings

- Australian produced was most motivating for chicken purchase as an on pack claim with 74% more likely to buy – however all significantly lower amongst lapsed users.

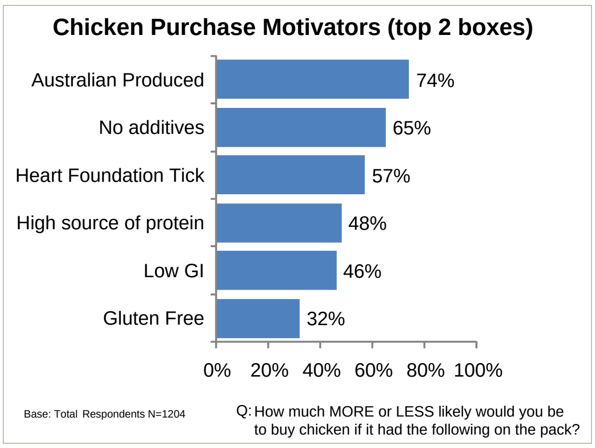


Figure 9. Chicken purchase motivators

4. Recommendations

Chicken requires a central communication/positioning platform just as beef is considered high in protein, lamb as high in iron and being Australian or fish as being high in Omega 3 and low in fat and cholesterol. Chicken has the opportunity based on its health claims to compete on a similar platform.

It is important to maintain the relevance and visibility of the current motivators for chicken purchase. The development of new chicken recipes and modern meal ideas can help reinforce the versatility of chicken. Chicken is quick and easy to prepare, and in a time poor society, this will remain a key purchase driver. With price being a reason chicken is purchased over other meats, ensure value offers are available and that the value for money that chicken offers can be communicated to consumers.

Chicken is currently known to be versatile, quick and easy to prepare and cook. The industry needs to communicate this in a consistent and relevant way.

Concerns over animal welfare and the perceived use of steroids and antibiotics when producing chickens are alleviated through the purchase of specialised chicken products. Purchase interest of specialised chicken increases with self-perceived knowledge of the different types. Interest is high amongst heavy, medium and light consumers. Free-range and organic chicken platforms will need to be communicated carefully as to not increase negative perceptions of regular chicken. In addition, communication programs are required to address regular chicken myths.

Australian produced was found to be motivating for chicken purchase amongst heavy, medium and light consumers. Appealing to Australians emotions by communicating that the purchase of the product 'supports Australian farmers', has potential to impact consumers purchase decision.

Chicken needs to be seen and heard. The most commonly referred to sources that influence meat choices are Cookbooks, TV chefs and friends, family and colleagues. The chicken industry needs to ensure that it possesses a strong presence in these areas. The most credible sources were considered to be government agencies, nutritionists and dieticians. These sources would be useful during times of concern.

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