










**Consumer Usage and Attitudes Toward
Chicken, Lamb, Pork and Veal Study –
Data for the Canadian Agri-food Industry**

**Final Combined Report
June, 2008**

Ipsos Forward Research  **Agriculture and
Agri-Food Canada** **Agriculture et
Agroalimentaire Canada**




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Background

With domestic markets for food maturing, the growth in volumes of generic food products is limited. Greater opportunities for growth will result from products that are differentiated to meet specific market segments and consumer demands.

In order to better understand this trend, the Canadian Pork Council, Chicken Farmers of Canada, Canadian Sheep Federation, Ontario Veal Association, have commissioned Ipsos Forward Research and the George Morris Centre to conduct research designed to explore marketing segments and opportunities with the goal of assisting producers and processors to better meet consumer needs, create higher value propositions and capture increased returns.

In order to do so, Ipsos Forward Research conducted a two-phase research project with consumers: an online usage and attitudes study; and, a purchase tracking study utilizing our consumer diary panel.

This report summarizes findings from the online usage and attitudes study.

The project was funded, in part, by Agriculture and Agri-Food Canada through their Advancing Canadian Agriculture and Agri-Food (ACAAF) program

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Research Objectives

The primary research objectives for this study were to:

- Provide insight into consumption patterns
- Understand degree to which chicken, lamb, pork and veal is purchased/consumed in-home versus food service along with drivers of choice
- Identify the attitudinal aspects of consumer behaviour in relation to purchasing and consumption patterns across retail and foodservice sectors
- Gather performance ratings for chicken, lamb, pork and veal on core performance measures
- Determine consumers' attitudes toward the meat categories included on key factors pertaining to food, health, lifestyle

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Research Methodology – Consumer Usage And Attitudes

- A total of 3200 online surveys were completed by meat consumers across Canada, with 800 completed surveys for each of the four types of meats.
- Consumers were recruited from Ipsos-Reid's I-Say Panel and were screened to ensure they consumed meat during the past 12 months.
- Results presented in this report are based on surveys completed between June 22 and July 9, 2007.
- The average survey took 22 minutes to complete.
- The breakdown of the completed surveys by region is as follows:

Completed Surveys	British Columbia	Alberta	Prairie Provinces (MB / SK)	Ontario	Quebec	Atlantic Provinces	Total Number of Completes
Chicken Consumers <i>(Margin of Error)</i>	115 9.1%	88 10.4%	64 12.3%	252 6.2%	235 6.4%	46 14.4%	800 3.64%
Pork Consumers <i>(Margin of Error)</i>	110 9.3%	93 10.2%	59 12.7%	302 5.64%	167 7.6%	69 11.8%	800 3.64%
Lamb Consumers <i>(Margin of Error)</i>	236 6.4%	81 10.9%	42 15.1%	311 5.6%	78 11.1%	52 13.6%	800 3.5%
Veal Consumers <i>(Margin of Error)</i>	117 9.1%	69 11.8%	39 15.7%	284 5.8%	268 6.0%	23 20.4%	800 3.64%

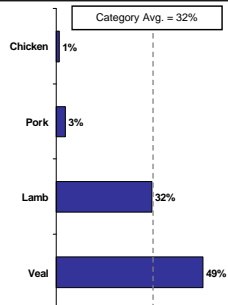
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Interpretation Of Results: Category Average Comparison

- We have inserted “category average” comparisons wherever applicable to allow the commodity groups to understand how their results compare with the overall meat category.
- The “category average” represents the Overall Meat Category Average calculated as a straight average of results for chicken, lamb, pork and veal.
- These comparisons are shown in two ways: a dotted line depicting the average rating for that measure (based on all for commodity groups) and a text box reading Category Avg. = X%.

% Consumers Who Did Not Eat These Types Of Meats During the Past 12 months



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Population Projections

- In order to better understand market penetration by region, age and gender, we have included population projections based on the 2006 Canadian Census. The tables below illustrate the assumed population of adults (18+) for each subgroup.

Canada – 24,719,610

British Columbia – 3,267,335

Alberta – 2,515,180

Manitoba/Saskatchewan – 1,605,195

Ontario – 9,439,970

Quebec – 5,996,935

Atlantic – 1,823,990

Male – 11,944,900

Female – 12,774,725

18-34 – 6,913,245

35-49 – 7,439,325

50-64 – 6,031,790

65+ – 4,335,250

Note: 2.3% of potential respondents did not qualify to the study as they did not consume any kind of meat during the past 12 months.

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Executive Summary



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Executive Summary (Cont'd)

Understanding Chicken, Lamb, Pork, and Veal Consumer Demographics

Chicken consumers* are:

- Concentrated in Ontario and Quebec;
- Male;
- Older (50 and older);
- 1-2 person households;
- Households without children;
- Higher income households (55K +);

Pork consumers tend to be:

- Less concentrated in British Columbia;
- Older (35 and older);

Lamb consumers tend to be:

- More highly concentrated in Ontario and British Columbia;
- Male;
- Older (65 and older);
- 1-2 person households;
- Households without children;
- Higher income households (100K +);

Veal consumers tend to be:

- More highly concentrated in Quebec;
- Male;
- Older (50+);
- Households without children;
- Higher income households (100K +);

*Note: Because the incidence of chicken consumption includes virtually all respondents, the base for the non-user group is too small to draw meaningful comparisons. Instead, we have included an analysis of chicken consumers only.

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Executive Summary (Cont'd)

Core Consumers versus Low-usage Consumers

In order to better understand how meat consumption differs by key demographic groups, we have included a comparison of core consumers and low-usage consumers.

For the purpose of this study we defined Core Consumers as the top 25% consumers with the highest chicken, pork, lamb or veal usage.

- For Core Chicken Consumers chicken represents 58% of their overall meat consumption in the past 12 months.
- For Core Pork Consumers pork represents 32% of their overall meat consumption in the past 12 months.
- For Core Lamb Consumers lamb represents 16% of their overall meat consumption in the past 12 months.
- For Core Veal Consumers veal represents 13% of their overall meat consumption in the past 12 months.

And we defined the Low-Usage Consumers as the low 25% consumers with the lowest chicken, pork, lamb or veal usage.

- For Low-Usage Chicken Consumers chicken represents 16% of their overall meat consumption.
- For Low-Usage Pork Consumers pork only represents 7% of their overall meat consumption.
- For Low-Usage Lamb Consumers lamb only represents 1% of their overall meat consumption.
- For Low-Usage Veal Consumers veal represents 1% of their overall meat consumption.

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Executive Summary (Cont'd)

Core Consumers versus Low-usage Consumers (Cont'd)

Core Chicken Consumers tend to be:

- More likely to indicate they are eating more chicken than two years ago (42%) versus low-usage consumers (13%).
- More highly concentrated in Ontario and British Columbia while low-usage chicken consumers are more highly concentrated in Quebec.
- Two-thirds female whereas low-usage chicken consumers have nearly equal representation of men and women.

Core Pork Consumers tend to be:

- More likely to indicate they are eating more pork than two years ago (26%) versus low-usage consumers (7%).
- Predominantly male (67%) and older (50+, 65%).

Core Lamb Consumers tend to be:

- More likely to indicate they are eating more lamb than two years ago (30%) versus low-usage consumers (11%).

Core Veal Consumers tend to be:

- More likely to indicate they are eating more veal than two years ago (19%) versus low-usage consumers (3%).
- Highly concentrated in Quebec

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Executive Summary (Cont'd)

In order to better understand what drives meat consumption overall we have utilized Penalty/Reward Analysis. Penalty/Reward analysis is a multivariate statistical technique designed to better understand how high and low performance on specific attributes impacts usage.

Drivers of High and Low Usage for Meat Overall (Prepared at Home)

- By far, the most significant driver of meat consumption is "*the whole family will eat it*". This attribute represents the most significant penalty of any attribute tested, in other words, if not performed well it is the most significant barrier to usage.
- Other important attributes include taste, healthiness, value for money and quick to prepare.

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Executive Summary (Cont'd)

Overall Satisfaction with Chicken Prepared at Home

- Overall, satisfaction with all the meats tested is very high. Three-quarters of pork, lamb and chicken consumers indicate they are “*completely satisfied*” (with no room for improvement) with the meat they purchased during the past twelve months.
- Although, overall satisfaction with veal prepared at home is extremely high among veal consumers, the percentage who are “completely satisfied” is lower than the category average.

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Executive Summary (Cont'd)

Key Findings from Performance Grid Analysis

Performance grid analysis is a technique used to understand and identify critical strengths and weaknesses using a combination of derived importance and stated performance.

Meat Consumption Overall

- For all critically important attributes chicken performs above average and no critical weaknesses were identified. For “*the whole family will eat it*”, “*quick to prepare*” and “*versatility*” chicken is the gold standard.
- The one area of potential concern is “*value for money*” where chicken still receives the highest rating of all meats, but the performance is on the boarder line of being considered a critical weakness.

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Executive Summary *(Cont'd)*

Preference for Chicken, Lamb, Pork, and Veal by Meal Occasion (Prepared at Home)

- Relative to other meats, chicken receives above average preference ratings for regular weekday meals and regular weekend meals, while lamb and veal are the meats of choice for entertaining guests or for special occasions.
- Pork receives below average “strongly prefer” ratings for all meal occasions.
- When asked which cut of meat is purchased most often, respondents indicate they consume a variety of cuts of meat depending on the meal occasion.
- A larger variety of cuts, including more expensive cuts, are consumed while entertaining guests or for special occasions at home.
- Unlike other meat categories tested, the most preferred cut of chicken does not vary significantly by occasion type. Preference for whole chicken does, however, increase significantly when the dining occasion is more “special” or allows for more preparation time.

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Executive Summary *(Cont'd)*

Attitudes Toward Country of Origin When Purchasing Meat by Meal Occasions

- Country of origin is very important to the majority (51%) of lamb consumers, who indicated they typically look for the country or region of origin when buying lamb for preparation at home.
- Regardless of the meal occasion, only 25% of pork and chicken consumers and 35% of veal consumers typically look for the country of origin when buying pork, chicken or veal for preparation at home.
- This factor increases slightly in importance for entertaining guests or special occasions, for all four meats tested.

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Executive Summary (Cont'd)

Use of Recipes among Meat Consumers

- Regardless of meal occasion type, approximately one half of all meat consumers indicate they often search for new recipes. The likelihood of searching for a new recipe increases as the dining occasion becomes more special or allows for more preparation time.
- The leading recipe sources are cookbooks (65%), the Internet (58%) and magazines (50%).
- At least 34% of respondents who personally prepared meals at home indicate they are influenced by in-store meat recipes and promotional activities at least “*some of the time*”.
 - Chicken and veal consumers are more likely to be influenced in purchasing chicken and veal based on in-store promotional activities.
 - Most of the lamb consumers are “rarely” or “never” influenced to purchase lamb based on recipes or in-store promotional information.

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Executive Summary (Cont'd)

Purchasing Channels

- By far, the leading channel for any of the chicken, lamb, pork and veal purchases is via large chain grocery stores (78%).
- However, a number of alternative channels attract considerable proportions of meat shoppers:
 - Butcher shops (28%)
 - Warehouse club stores (23%)
 - Independent grocery stores (18%)
 - Discount grocery stores (15%)
 - Farmers' markets or Farm gate (12%)
- When asked to select the characteristics most strongly associated with each retail channel, the following trends were evident and were consistent from meat to meat:
 - Large Grocery Chain – “One stop for all my grocery needs”
 - Independent Grocery Stores – “Convenient location”
 - Discount Grocery Stores – “Competitive prices and value for money”
 - Warehouse Club Stores – “Competitive prices and value for money”
 - Mass Merchandisers/Discount Department Stores – “Competitive prices”
 - Ethnic Grocery Stores – “Shopping experience”
 - Butcher Shops – “Chicken quality” and “Chicken freshness”
 - Farmers' Markets – “Chicken freshness”

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Executive Summary (Cont'd)

Organic Meat / Meat Raised without Antibiotics (Consumption at Home)

- The majority of chicken, lamb, pork and veal consumers are aware of organic meat, although only a small percentage (less than 20%) indicate they “*know a lot about it*”.
 - Awareness of organic chicken is significantly higher than for other meats tested (87%).
- Among those aware of these types of chicken, lamb, pork, and veal, up to one quarter indicate they have purchased them during the past 12 months.
- However, among those who have purchased organic chicken, pork, lamb, and veal these products represent a significant proportion (up to 56%) of their overall chicken, pork, lamb, and veal purchases.
- Interestingly, the preference for organic meat increases steadily as the dining occasion becomes more special.

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Executive Summary (Cont'd)

Chicken Consumption Away from Home

- Among chicken consumers, chicken is a staple restaurant food that is ordered at any location away from home: at fast food restaurants, as ready-to-eat meals from grocery or convenience stores, at family restaurants, and at fine dining restaurants.
- When compared against the other meats, lamb and veal are rarely ordered as fast-food or a ready-to-eat meal. Lamb and veal consumption is the highest at fine-dining restaurants.
- In terms of preference by restaurant type, chicken performs extremely well in fast food, ready to eat meals from grocery and family dining.
- Lamb and veal are, by far, the most preferred meats at fine dining restaurants.

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Detailed Findings



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Incidence Of Meat Consumption

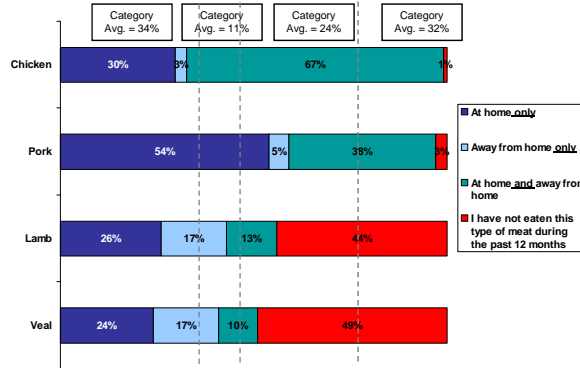
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Meat Consumption During The Past 12 Months

All Respondents

- Chicken and pork consumption is virtually universal among meat-consuming Canadian adults during the past 12 months.
 - While the majority of chicken consumers have eaten chicken **both** prepared at home and away from home, the majority of pork consumers have **only** consumed pork that was prepared at home.
- Slightly more than half of all respondents consumed lamb (57%) and veal (52%) prepared at home or away from home during the past 12 months.
 - Relative to the category average, lamb and veal consumers are less likely to have consumed "at home only" and more likely to have consumed "away from home only".



Base: All respondents: n=3200

Q3. Which of the following meats, prepared and/ or eaten at home or away from home have you personally consumed during the past 12 months?
 Note: "Category Average" represents the Overall Meat Category Average calculated as a straight average of results for chicken, lamb, pork and veal.

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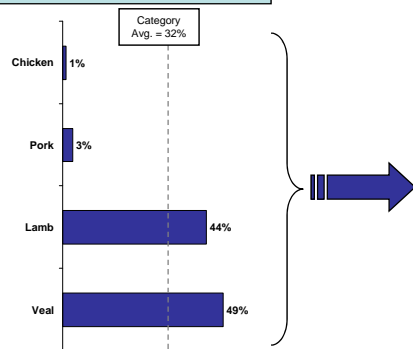


Reasons For Not Eating Meat

Did Not Eat Chicken, Lamb, Pork or Veal During The Past 12 Months

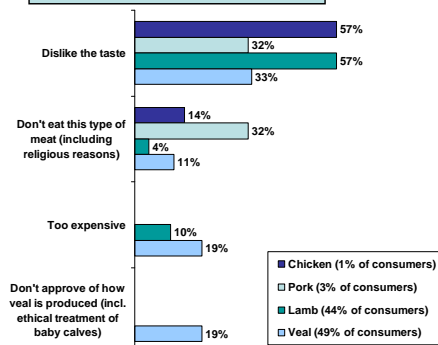
- Taste, is by far, the primary barrier among consumers who do not eat these types of meat.
- Among those who have not eaten pork during the past 12 months, religious reasons are also barriers to consumption.
- While for one-in-five of those who do not eat veal, a negative perception of veal farming is the primary reason.

% Consumers Who Did Not Eat These Types Of Meats During the Past 12 months



Base: All respondents: n=3200

Main Reasons For Not Eating Meat



Base: Did Not Eat These Types of Meats During The Past 12 Months

Q3. Which of the following meats, prepared and/ or eaten at home or away from home have you personally consumed during the past 12 months?
 Q3D. What are the main reasons you did not eat [chicken/lamb/pork/veal] during the past 12 months?

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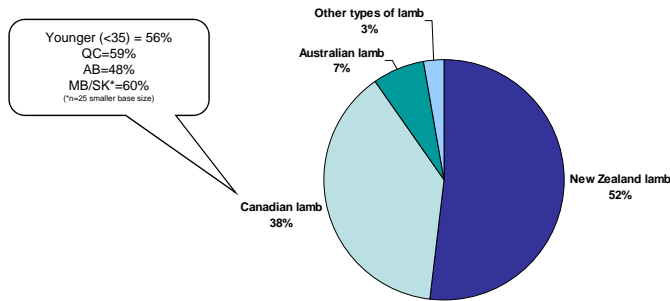


Country Of Origin For The Lamb Purchased During The Past 12 Months

Lamb Consumers Who Ate Lamb Prepared At Home



- The majority of the lamb prepared at home is New Zealand lamb, while Canadian lamb represents roughly one third of the lamb consumed in the past 12 months.
 - Younger consumers and those from Quebec, Alberta and the Prairies are more likely to purchase most of their lamb from Canada than other consumers.



Base: Lamb Consumers Who Ate Lamb Prepared At Home: n=550

Q7B. [SUMMARY - MEAN] And thinking only about the lamb you have prepared and/ or eaten at home during the past 12 months, what proportion was ...?

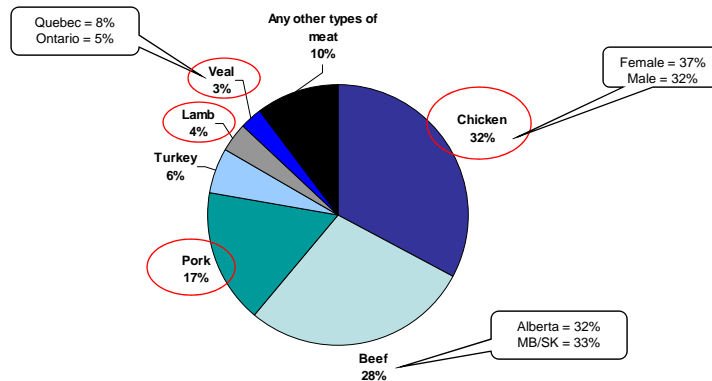
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Consumption Of Meats In The Past 12 Months

Respondents Who Consumed Meat Prepared At Home

- Respondents indicate that chicken was included in approximately one third of their total meals prepared at home, during the past 12 months. Beef ranks as a close second (28%).
- Pork is positioned as the third most-often consumed meat behind chicken and beef.
- Lamb and veal are included in less than 5% of total meals prepared at home.



Base: All Respondents Who Consumed These Types of Meats Prepared At Home: n=2588

Q7mean. [SUMMARY - MEAN] Thinking of all the meats you have prepared and/ or eaten at home during the past 12 months, what proportion was ...?

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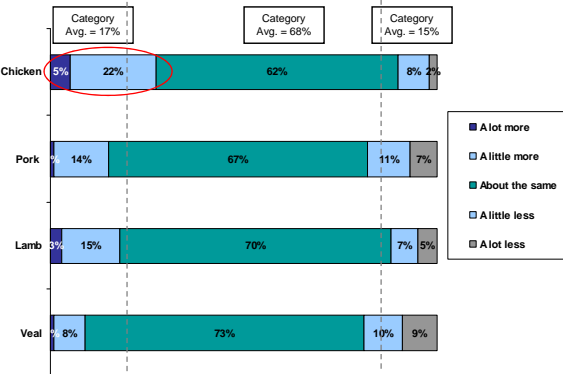


Consumption Of Chicken, Lamb, Pork and Veal Relative To 2 Years Ago

Chicken, Lamb, Pork and Veal Consumers

- Relative to 2 years ago, the vast majority of consumers eat about the same amount of chicken, lamb, pork and veal.
 - There are only slight differences by province of residence, age and gender of respondents.

27% of chicken consumers indicate they are eating more chicken now than they did two years ago. This level is significantly higher than the category average of 17%.



Base: Consumers of each Type of Meat: n=800 for each type of meat

Q5. Relative to two years ago, would you say that you currently consume [chicken/lamb/pork/veal] ...?

Note: "Category Average" represents the Overall Meat Category Average calculated as a straight average of results for chicken, lamb, pork and veal.

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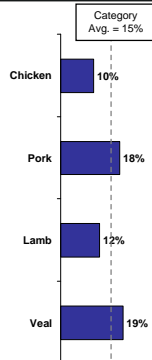


Reasons For Eating Less Chicken, Lamb, Pork and Veal Relative To 2 Years Ago

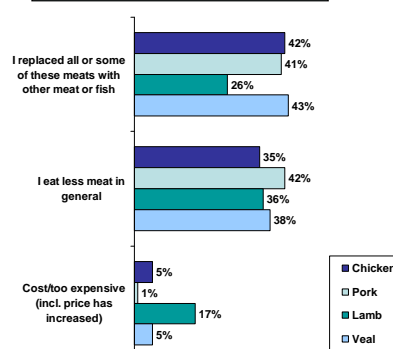
Consume Less Chicken, Lamb, Pork and Veal

- Among those eating less of chicken, lamb, pork or veal now, eating less meat in general and replacing these meats with other meats or fish stand out as the two main reasons.
 - There are only slight differences by demographics.

% Consumers Who Eat Less of This Meat Relative to 2 Years Ago



Main Reasons For Eating Less of This Meat Relative to 2 Years Ago



Base: Consumers of each Type of Meat: n=800 for each type of meat

Base: Consumers Who Eat Less of These Types of Meats Relative To 2 Years Ago

Q5. Relative to two years ago, would you say that you currently consume [chicken/lamb/pork/veal] ...?

Q6. Which of the following best describes why you, personally, are eating less of [chicken/lamb/pork/veal] relative to two years ago?

Note: "Category Average" represents the Overall Meat Category Average calculated as a straight average of results for chicken, lamb, pork and veal.

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Incidence Of Chicken, Lamb, Pork and Veal Consumption During The Past 12 Months

- The incidence of chicken and pork consumption is relatively consistent across region, gender age and income segments.
- The incidence of lamb consumption varies significantly:
 - By province, it is the highest in British Columbia (69%) and Ontario (60%) and the lowest in Manitoba and Saskatchewan.
 - By gender, while 60% of men have eaten lamb during the past twelve months only 53% of women have.
 - By age, the incidence of lamb consumption increases steadily with age from 53% among adults under 35 to 66% of seniors.
 - By income, the incidence of lamb consumption increases steadily with household income from 48% among those with less than \$30,000 per year to 66% among those with \$100,000 or more.
- The incidence of veal consumption varies significantly:
 - By province, it is the highest in Quebec (79%) and the lowest in British Columbia (52%) and Atlantic Canada (23%).
 - By gender, while 57% of men have eaten veal during the past twelve months only 45% of women have. Relative to other meats tested, veal has the most significant gap between genders for incidence of consumption.
 - By age, the incidence of veal consumption is slightly higher among older adults (50+).
 - By income, the incidence of veal consumption increases steadily with household income from 46% among those with less than \$30,000 per year to 57% among those with \$100,000 or more.

Note: 2.3% of potential respondents did not qualify to the study as they did not consume any kind of meat during the past 12 months.

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Consumers Demographics

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Chicken, Lamb, Pork and Veal Consumers Demographics During The Past 12 Months

Below there is a summary of a side-by-side comparison of users and non-users.

*Note: Because the incidence of chicken consumption includes virtually all respondents, the base for the non-user group is too small to draw meaningful comparisons. Instead, we have included an analysis of chicken consumers only.

Chicken consumers are:

- Concentrated in Ontario and Quebec;
- Male;
- Older (50 and older);
- 1-2 person households;
- Households without children;
- Higher income households (55K +);

Pork consumers tend to be:

- Less concentrated in British Columbia;
- Older (35 and older);

Lamb consumers tend to be:

- More highly concentrated in Ontario and British Columbia;
- Male;
- Older (65 and older);
- 1-2 person households;
- Households without children;
- Higher income households (100K +);

Veal consumers tend to be:

- More highly concentrated in Quebec;
- Male;
- Older (50+);
- Households without children;
- Higher income households (100K +);

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Core and Low-Usage Chicken Consumers Demographics

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Core and Low-Usage Chicken, Lamb, Pork and Veal Consumers Interpretation

In order to better understand how meat consumption differs by key demographic groups, we have included a comparison of core consumers and low-usage consumers.

For the purpose of this study we defined Core Consumers as the top 25% consumers with the highest chicken, pork, lamb or veal usage.

- For Core Chicken Consumers chicken represents 58% of their overall meat consumption in the past 12 months.
- For Core Pork Consumers pork represents 32% of their overall meat consumption in the past 12 months.
- For Core Lamb Consumers lamb represents 16% of their overall meat consumption in the past 12 months.
- For Core Veal Consumers veal represents 13% of their overall meat consumption in the past 12 months.

And we defined the Low-Usage Consumers as the low 25% consumers with the lowest chicken, pork, lamb or veal usage.

- For Low-Usage Chicken Consumers chicken represents 16% of their overall meat consumption.
- For Low-Usage Pork Consumers pork only represents 7% of their overall meat consumption.
- For Low-Usage Lamb Consumers lamb only represents 1% of their overall meat consumption.
- For Low-Usage Veal Consumers veal represents 1% of their overall meat consumption.

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Summary - Core and Low-Usage Consumers

Core Chicken Consumers tend to be:

- More likely to indicate they are eating more chicken than two years ago (42%) versus low-usage consumers (13%).
- More highly concentrated in Ontario and British Columbia while low-usage chicken consumers are more highly concentrated in Quebec.
- Two-thirds female whereas low-usage chicken consumers have nearly equal representation of men and women.

Core Pork Consumers tend to be:

- More likely to indicate they are eating more pork than two years ago (26%) versus low-usage consumers (7%).
- Predominantly male (67%) and older (50+, 65%).

Core Lamb Consumers tend to be:

- More likely to indicate they are eating more lamb than two years ago (30%) versus low-usage consumers (11%).

Core Veal Consumers tend to be:

- More likely to indicate they are eating more veal than two years ago (19%) versus low-usage consumers (3%).
- Highly concentrated in Quebec

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Penalty - Rewards Analysis Drivers of High Usage and Low Usage For The Whole Meat Category

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Developing Actionable Strategies – Defining The Drivers Of High Usage

Identifying Drivers Through Penalty/Reward Analysis

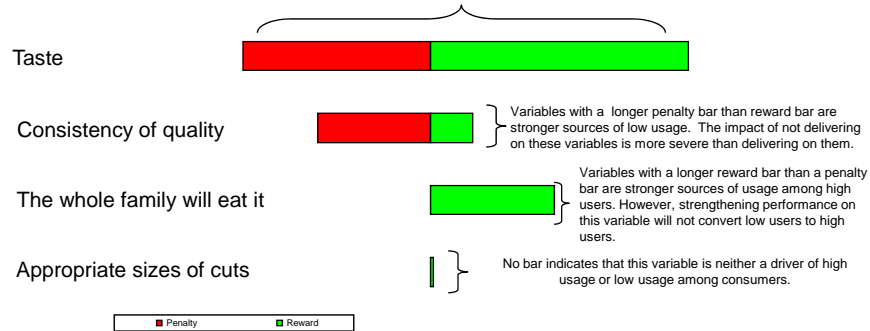
- We use “Penalty/Reward” (Shapley Value) analysis to determine the “low usage” and “high usage” drivers.
- Conventional driver analysis is based on a regression model. It looks at scalar data for overall usage and derives the likelihood that specific attributes are likely to move usage.
- However, in reality, some performance activities or attributes simply maintain usage – they are considered “cost of entry” or “table stakes”. Traditional, regression-based models tend to confirm the importance of these already-known cost of entry attributes.
- Hence, we used Penalty/Reward analysis (Shapley Value analysis is used to derive penalty/reward analysis), which looks at both drivers of high usage and drivers of low usage to identify those attributes that strongly indicate the causes of disappointment or delight, and are therefore likely to have the greatest impact on business results.
- The output is displayed as a bar chart indicating which areas are more likely to result in lower overall usage and which are more likely to result in higher overall usage.

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Interpreting Penalty And Reward Bars Analyzing Consumer Usage

- The red portion of the bar (penalty) indicates the strength of this variable as a driver of low usage. The green portion of the bar (reward) indicates the strength of this variable as a driver of high usage. Overall bar length indicates the overall importance of the variable in driving overall usage.
- Attributes are sorted in descending order of 'importance' – ie., magnitude, or the sum of the penalty and the reward. Items with both a large penalty and a large reward are considered more important than those with only a comparable sized penalty or reward.



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Penalty/Reward Analysis – Background

Interpretation:

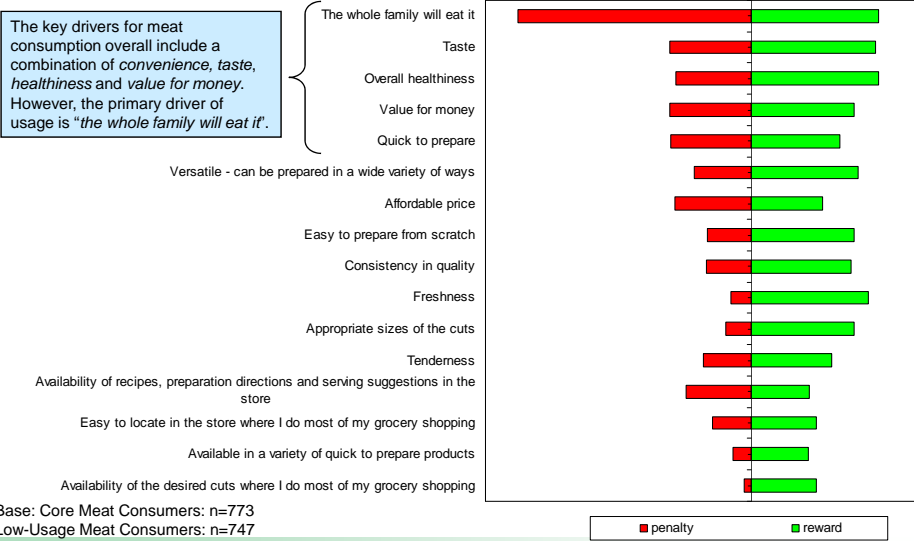
- Attributes that offer both a penalty and a reward provide insight in preventing low usage and increasing overall usage.
- Fix those attributes that offer only a significant penalty. These may be considered as a cost of entry. There is no reward for doing it right, but doing it wrong detracts from overall usage.
- Attributes that offer only a reward can be leveraged in the market to add value to the consumer.

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Drivers Of High Meat Usage And Low Meat Usage (1 to 10) Core and Low-Usage Meat Consumers

The key drivers for meat consumption overall include a combination of *convenience, taste, healthiness* and *value for money*. However, the primary driver of usage is *"the whole family will eat it"*.



Base: Core Meat Consumers: n=773
Low-Usage Meat Consumers: n=747

Q7. Thinking of all the meats you have prepared and/ or eaten at home during the past 12 months, what proportion was ...?
Q15. Thinking about the chicken you ate that was prepared at home in the past 12 months, please rate its performance on each of the following attributes. Please use a scale from 1 to 10, where 1 means "Very poor" and 10 means "Excellent".

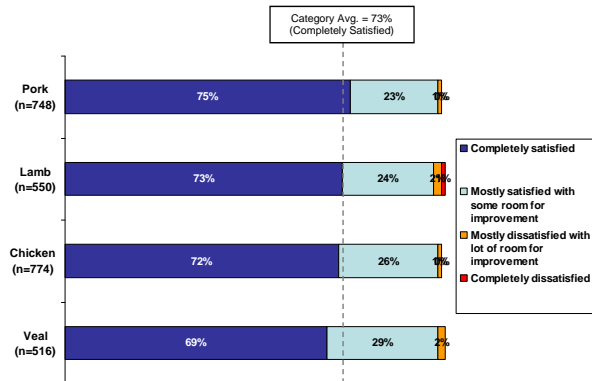


Performance Grid Analysis – Drivers Of Usage



Overall Satisfaction With Chicken, Lamb, Pork and Veal Prepared At Home Respondents Who Consumed Meat Prepared At Home

- Overall, satisfaction with all the meats tested is very high. Three-quarters of pork, lamb and chicken consumers indicate they are “completely satisfied” (with no room for improvement) with the meat they purchased during the past twelve months.
- Although, overall satisfaction with veal prepared at home is extremely high among veal consumers, the percentage who are “completely satisfied” is lower than the category average.



Base: Respondents Who Consumed Meat Prepared At Home: Chicken (n=774), Pork (n=748), Lamb (n=550), Veal (n=516)

Q14. Overall, how satisfied are you with the [chicken/lamb/pork/veal] that was prepared at home in the past 12 months?

Note: “Category Average” represents the Overall Meat Category Average calculated as a straight average of results for chicken, lamb, pork and veal.

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Overview of Performance Grid Analysis

- Penalty-reward analysis was used to determine which attributes had the greatest influence on overall meat usage.
- Four regions can be defined based on the derived importance ratings and the topbox performance scores for each of those attributes. The dotted vertical and horizontal lines represent the average performance and average importance values respectively.
- Attributes that require immediate attention are the ones located in the top left quadrant (critical weaknesses). These attributes have high importance ratings and are rated low on performance.
- Attributes located in the lower right quadrant have a high performance rating but are viewed as not very important. In some situations, these are simply trivial strengths. In other situations, the strengths can be promoted with the objective of raising its importance (this is particularly useful if it is a unique strength and one that would be difficult for others to emulate).

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Performance Grid Interpretation

Importance Penalty-Reward Analysis	Critical Weaknesses Attributes demanded by consumers but not delivered on by products <i>Average Importance Line</i>	Critical Strengths Attributes demanded by consumers and delivered on by products <i>Average Performance Line</i>
	Trivial Weaknesses Attributes that are not important and not delivered on by products	Strengths to Promote Attributes that products are delivering on but are not as important to consumers

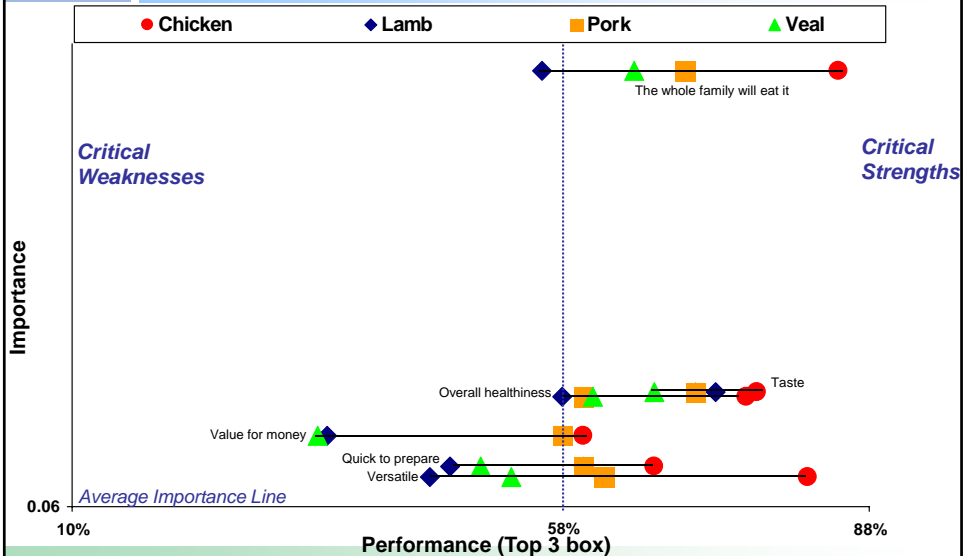
Performance
% of Producers rating performance "8", "9" or "10" where "10" means "excellent"

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Drivers Of Overall Meat Usage – Critical Weaknesses And Strengths

Respondents Who Consumed Meat Prepared At Home

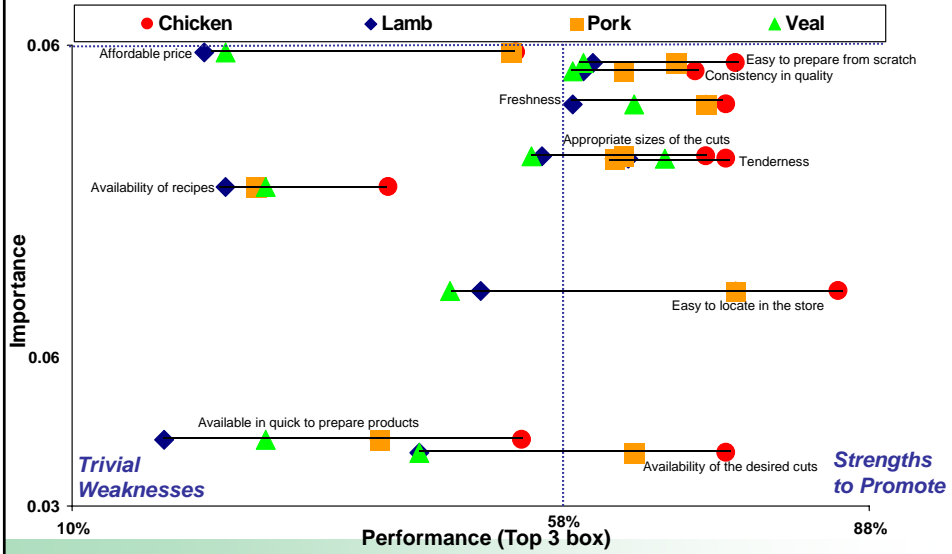


Q7. Thinking of all the meats you have prepared and/ or eaten at home during the past 12 months, what proportion was ...?
Q15. Thinking about the chicken you ate that was prepared at home in the past 12 months, please rate its performance on each of the following attributes. Please use a scale from 1 to 10, where 1 means 'Very poor' and 10 means 'Excellent'.

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Drivers Of Overall Meat Usage – Trivial Weaknesses And Strengths To Promote Respondents Who Consumed Meat Prepared At Home



Q7. Thinking of all the meats you have prepared and/ or eaten at home during the past 12 months, what proportion was ...?
Q15. Thinking about the chicken you ate that was prepared at home in the past 12 months, please rate its performance on each of the following attributes. Please use a scale from 1 to 10, where 1 means 'Very poor' and 10 means 'Excellent'.



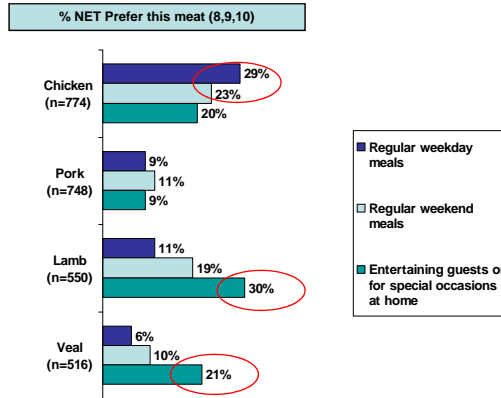
Detailed Findings – Consumption Of Meat Prepared At Home



Preference For Meat By Meal Occasions

Respondents Who Consumed Meat Prepared At Home

- Relative to other meats, chicken is the most preferred meat for regular weekday and regular weekend meals, while lamb and veal are the meats of choice for entertaining guests or for special occasions.
- Pork receives below average "strongly prefer" ratings for all meal occasions.



Base: Respondents Who Consumed Meat Prepared At Home: Chicken (n=774), Pork (n=748), Lamb (n=550), Veal (n=516)
 Q8. Please indicate how strongly you prefer to eat [chicken/pork/lamb/veal] prepared at home for each of the following occasions. Please use a scale from 1 to 10, where 1 means 'I strongly prefer other meats for this occasion' and 10 means 'I strongly prefer this meat for this occasion'.

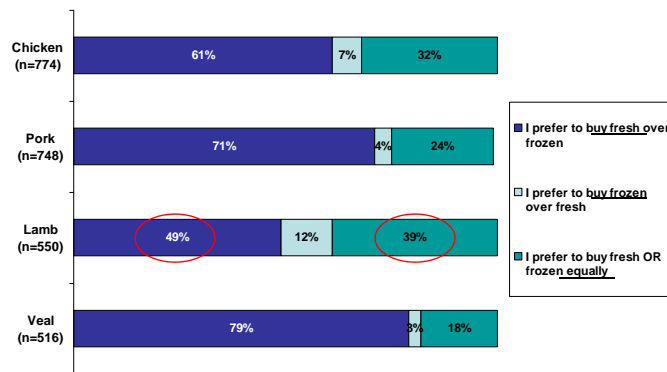
47



Preference For Fresh vs. Frozen Meat

Respondents Who Consumed Meat Prepared At Home

- Fresh meat is the preferred choice by a significant margin for the majority of any meat consumers, with the exception of lamb consumers. 39% of lamb consumers indicate they prefer fresh and frozen lamb equally.



Base: Respondents Who Consumed Meat Prepared At Home: Chicken (n=774), Pork (n=748), Lamb (n=550), Veal (n=516)
 Q12. Which of the following best describes your preference when buying fresh or frozen [chicken/pork/lamb/veal] to be prepared at home?

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Cuts Of Meat Consumed Most Often By Meal Occasion

Respondents Who Consumed Meat Prepared At Home

- Respondents consume a variety of cuts of meat depending on the meal occasion.

- A larger variety of cuts, including more expensive cuts, are consumed while entertaining guests or for special occasions at home.

- Unlike other meat categories tested, the most preferred cut of chicken does not vary significantly by occasion type. Preference for whole chicken does, however, increase significantly when the dining occasion is more "special" or allows for more preparation time.

Top 5 Cuts Consumed Most Often	Regular weekday meals	Regular weekend meals	Entertaining guests or for special occasions
Base: Chicken Consumers (n=774)	(n=774)	(n=774)	(n=774)
Boneless/Skinless breast	53%	44%	52%
Whole chicken	10%	21%	26%
Regular Breast	7%	6%	3%
Boneless/Skinless thighs	7%	5%	3%
Wings	3%	8%	9%
Base: Pork Consumers (n=748)	(n=748)	(n=748)	(n=748)
Chops	45%	15%	10%
Bacon	11%	21%	3%
Ham	12%	9%	19%
Tenderloin	9%	13%	28%
Roasts	5%	21%	21%
Base: Lamb Consumers (n=550)	(n=550)	(n=550)	(n=550)
Chops	49%	40%	22%
Ground Lamb	16%	5%	2%
Leg	12%	22%	38%
Rack	5%	14%	23%
Base: Veal Consumers (n=516)	(n=516)	(n=516)	(n=516)
Ground veal	32%	13%	7%
Cutlets	28%	32%	25%
Chops	16%	16%	9%
Scaloppini	10%	13%	19%
Roasts	6%	16%	24%

Q13. Thinking back over the past 12 months, which of the following cuts of [chicken/pork/lamb/veal] did you eat most often for each of the following occasions?

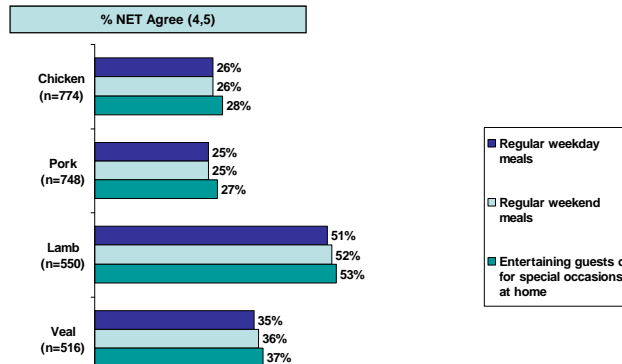
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Attitudes Toward Actively Looking for the Country of Origin When Purchasing Meat – By Meal Occasions

Respondents Who Consumed Meat Prepared At Home

- Country of origin is very important to the majority of lamb consumers, who indicate they typically look for the country or region of origin when buying lamb for preparation at home.
- Regardless of the meal occasion, only one quarter of pork and chicken consumers and one third of veal consumers typically look for the country of origin when buying pork, chicken or veal for preparation at home.
- This factor increases slightly in importance for entertaining guests or special occasions, for all four meats tested.



Base: Respondents Who Consumed Meat Prepared At Home: Chicken (n=774), Pork (n=748), Lamb (n=550), Veal (n=516)

Q19. [I typically look for the country, province or region of origin when buying chicken/pork/lamb/veal] - Thinking of each meal occasion listed below please indicate the extent to which you agree with each of the following statements about [chicken/pork/lamb/veal]. Please use a scale from 1 to 5, where 1 means 'I disagree completely' and 5 means 'I agree completely'.

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Detailed Findings – Recipe Availability and Influence

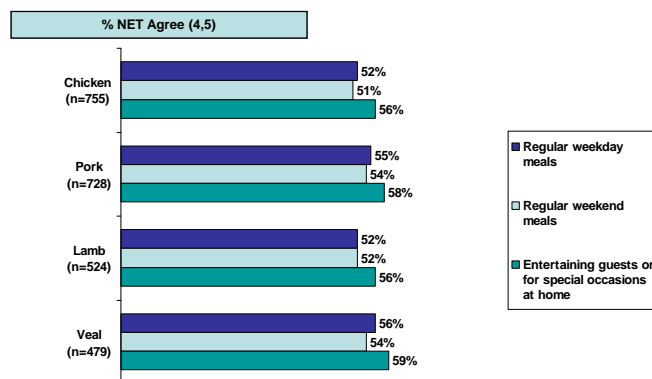
51



Attitudes About Only Purchasing Cuts that are Familiar and have Prepared Before – By Meal Occasions

Respondents Who Prepare Meals At Home

- When preparing chicken, pork, lamb or veal at home respondents typically purchase cuts of meat that they are familiar with and have prepared before.



Base: Respondents Who Prepare Meals at Home: Chicken (n=755), Pork (n=728), Lamb (n=524), Veal (n=479)

Q21. [I only purchase cuts of chicken/pork/lamb/veal that I am familiar with and have prepared before] Thinking of each meal occasion listed below, please indicate the extent to which you agree with each of the following statements about preparing [chicken/pork/lamb/veal]. Please use a scale from 1 to 5, where 1 means 'I disagree completely' and 5 means 'I agree completely'

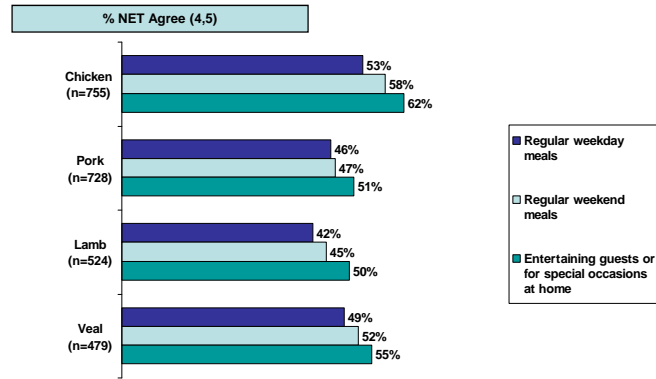
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Attitudes About Searching For New Recipes When Preparing Meat At Home – By Meal Occasions

Respondents Who Prepare Meals At Home

- Likelihood to search for new recipes increases as the dining occasion becomes more special or more preparation time is available.



Base: Respondents Who Prepare Meals at Home: Chicken (n=755), Pork (n=728), Lamb (n=524), Veal (n=479)

Q21. [I often search for new recipes] Thinking of each meal occasion listed below, please indicate the extent to which you agree with each of the following statements about preparing [chicken/pork/lamb/veal]. Please use a scale from 1 to 5, where 1 means 'I disagree completely' and 5 means 'I agree completely'

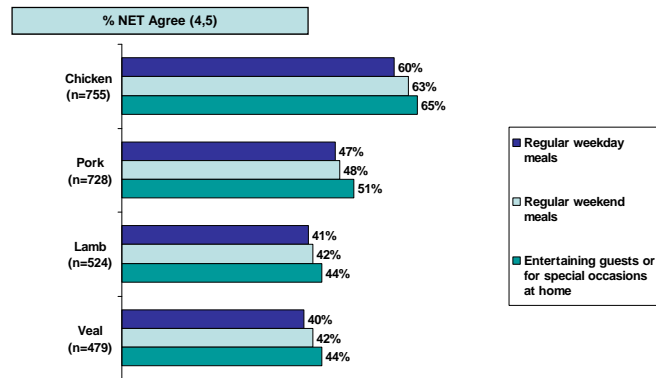
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Attitudes About Using Different Cooking Styles or Techniques When Preparing Meat At Home – By Meal Occasions

Respondents Who Prepare Meals At Home

- Chicken and pork consumers are more likely to enjoy preparing chicken and pork using different cooking styles and techniques.
- Likelihood to try different cooking styles or techniques increases as the dining occasion becomes more special or more preparation time is available



Base: Respondents Who Prepare Meals at Home: Chicken (n=755), Pork (n=728), Lamb (n=524), Veal (n=479)

Q21. [I often enjoy preparing chicken/pork/lamb/veal using different cooking styles or cooking techniques] Thinking of each meal occasion listed below, please indicate the extent to which you agree with each of the following statements about preparing [chicken/pork/lamb/veal]. Please use a scale from 1 to 5, where 1 means 'I disagree completely' and 5 means 'I agree completely'

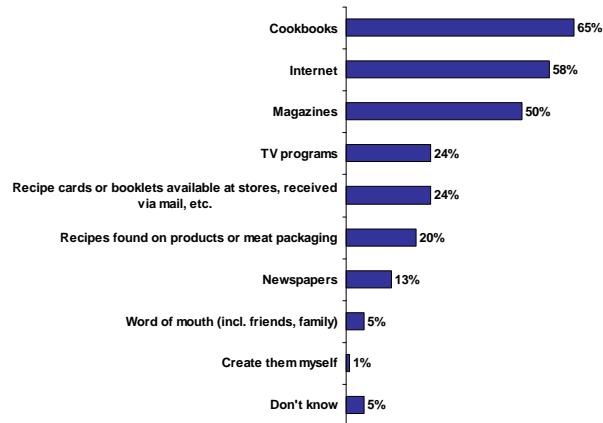
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Common Places To Find New Meat Recipes

Respondents Who Prepare Meals At Home

- Cookbooks, the Internet and magazines are the most commonly used sources for new meat recipes.



Base: Respondents Who Prepare Meals At Home: (n=2486)

Q22. Which of the following would you consider to be the three most common places where you find new meat recipes?

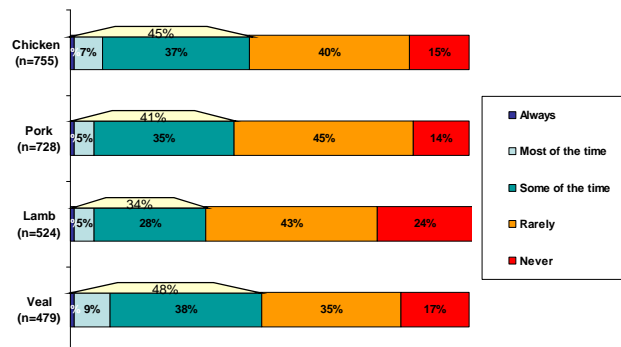
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Frequency Of Being Influenced In Purchasing Meat Based On Recipes

Respondents Who Prepare Meals At Home

- At least one third of respondents who personally prepare meals at home are influenced by in-store meat recipes and promotional activities at least "some of the time".
- Chicken and veal consumers are more likely to be influenced in purchasing chicken and veal based on in-store promotional activities.
- Most of the lamb consumers are "rarely" or "never" influenced to purchase lamb based on recipes or in-store promotional information.



Base: Respondents Who Prepare Meals at Home: Chicken (n=755), Pork (n=728), Lamb (n=524), Veal (n=479)

Q23. How often would you say you are influenced in purchasing [chicken/pork/lamb/veal] based on recipes or promotional information that you see or receive in the store or location where you purchase most of your [chicken/pork/lamb/veal]?

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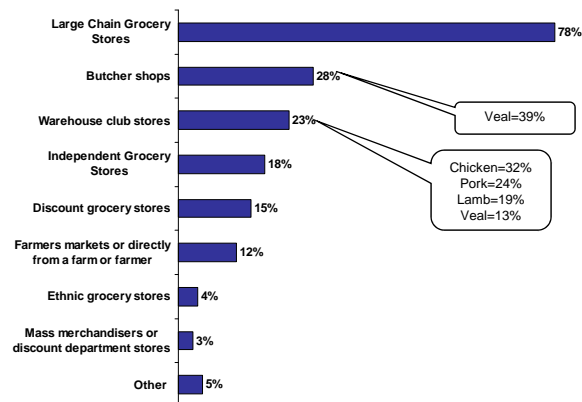
Detailed Findings – Purchasing Channels

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Purchasing Channels Respondents Who Consumed Meat Prepared At Home

- The majority of chicken, pork, lamb and veal is purchased via large chain grocery stores with butcher shops and warehouse or club stores being the second and third most-often used location.



Base: Respondents Who Consumed Meat Prepared At Home: (n=2588)

Q24. In the past 12 months, where did you buy [chicken/pork/lamb/veal] for preparation at home?

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Characteristics Most Strongly Associated With Buying Meat By Purchasing Channel Respondents Who Consumed Meat Prepared At Home

- Large chain grocery stores are strongly associated with “one stop for all my grocery needs” while ethnic grocery stores are mostly associated with the “shopping experience”.
- Respondents buy their chicken, pork, lamb and veal at farmers markets and butcher shop because of the “freshness” and “quality” they associate with these locations.
- There is no strong association for independent grocery stores, however nearly one quarter of consumers purchase there because of “convenient location”.

Base: Respondents Who Consumed Meat Prepared At Home	One stop for all my grocery needs	Convenient location	Competitive prices	Value for money	Shopping Experience	Meat Quality	Meat Freshness	Meat Selection	Service available when I need it
Large Chain Grocery Stores	35%	14%	12%	11%	3%	6%	5%	8%	5%
Independent Grocery Stores	13%	23%	10%	9%	9%	8%	7%	6%	15%
Discount grocery stores	10%	11%	32%	28%	5%	3%	3%	2%	7%
Warehouse club stores	11%	8%	30%	29%	6%	4%	3%	3%	6%
Mass merch.	14%	14%	28%	20%	7%	3%	3%	3%	8%
Ethnic grocery stores	3%	9%	5%	6%	33%	10%	7%	13%	13%
Butcher shops	2%	5%	3%	4%	4%	31%	27%	12%	11%
Farmers markets	3%	4%	5%	6%	9%	22%	39%	5%	6%

Base: Respondents Who Consumed Meat Prepared At Home: (n=2588)

Q26. Which one of the following characteristics do you most strongly associate with buying [chicken/pork/lamb/veal] at the locations listed below?

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Detailed Findings – Familiarity With Organic Meat and Meat Raised Without Antibiotics

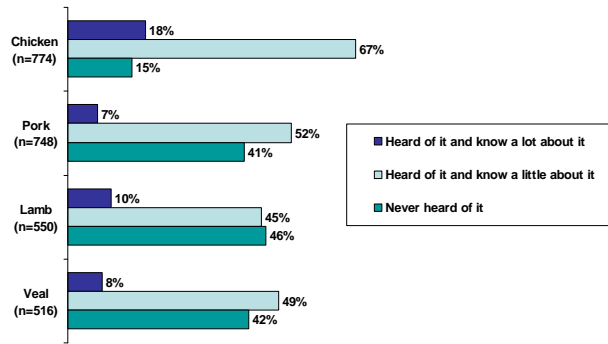
60



Familiarity With Organic Chicken, Lamb, Pork and Veal

Respondents Who Consumed Meat Prepared At Home

- The majority of chicken, lamb, pork and veal consumers are aware of organic meat, although only a small percentage indicate they “*know a lot about it*”.
- Awareness of organic chicken is significantly higher than for other meats tested.



Base: Respondents Who Consumed Meat Prepared At Home: Chicken (n=774), Pork (n=748), Lamb (n=550), Veal (n=516)

Q27. You may have heard about or seen [chicken/pork/lamb/veal] described as below. Please indicate how familiar you are with each of the following types.

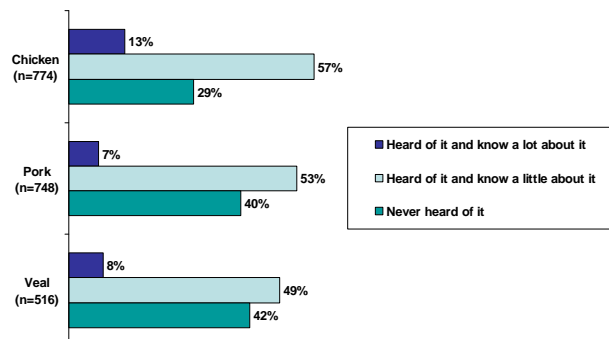
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Familiarity With Chicken, Pork and Veal Raised Without Antibiotics

Respondents Who Consumed Meat Prepared At Home

- The majority of chicken, lamb, pork and veal consumers are aware of chicken, pork and veal raised without antibiotics, although only a small percentage indicate they “*know a lot about it*”.



Base: Respondents Who Consumed Meat Prepared At Home: Chicken (n=774), Pork (n=748), Lamb (n=550), Veal (n=516)

Q27. You may have heard about or seen [chicken/pork/lamb/veal] described as below. Please indicate how familiar you are with each of the following types.

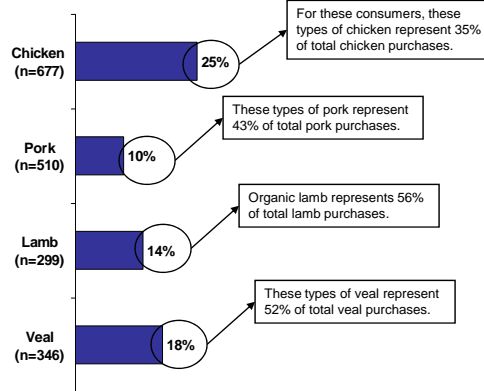
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Have Purchased Organic/Raised Without Antibiotics Meat

Respondents Who Heard About Organic/Raised Without Antibiotics Meat

- Among those aware of these types of chicken, lamb, pork, and veal, up to one quarter indicate they have purchased them during the past 12 months.
- However, among those who have purchased organic chicken, pork, lamb, and veal, these products represent a significant proportion of their overall chicken, pork, lamb, and veal purchases.



Base: Respondents Who Heard About Organic/Raised Without Antibiotics Meat

Q28. And in the past 12 months, have you purchased [chicken/pork/lamb/veal] of any of the types described earlier?
 Q29. What percentage of your personal consumption of [chicken/pork/lamb/veal] prepared at home, in the past 12 months, was any one of the types described earlier

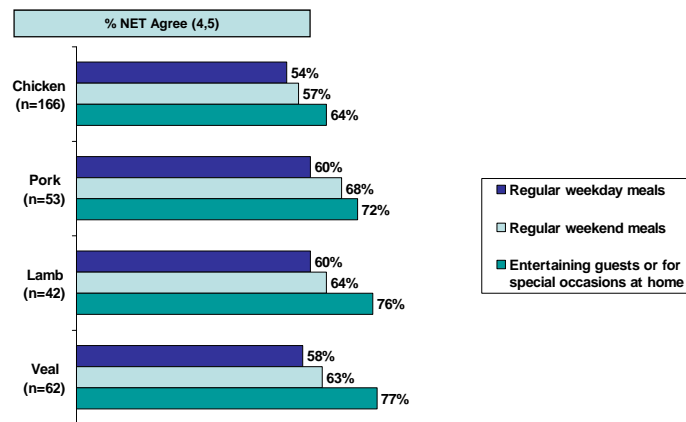
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Preference For Organic/Raised Without Antibiotics Meat By Meal Occasions

Respondents Who Purchased Organic/Raised Without Antibiotics Meat

- As with other meat categories, preference for organically raised or raised without antibiotics increases steadily as the dining occasion becomes more "special".



Base: Respondents Who Purchased Organic/Raised Without Antibiotics Meat

Q30. For each of the following occasions, please indicate how strongly you prefer to eat [chicken/pork/lamb/veal] that was prepared at home and was any one of the types described earlier. Please use a scale from 1 to 10, where 1 means 'I strongly dislike these types of meat' and 10 means 'I strongly prefer these types of meat'.

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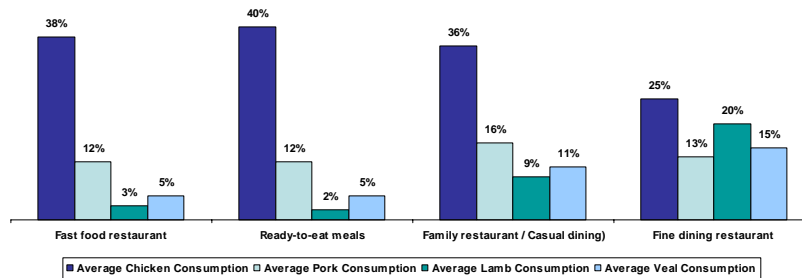
Detailed Findings – Consumption Of Meat Away From Home

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Proportion Of Chicken, Lamb, Pork and Veal Consumption Away From Home By Type Of Restaurant Respondents Who Eat Meat Away From Home

- Chicken consumption is significantly higher than any other meats at all these types of locations.
- When compared against the other meats, lamb and veal are rarely ordered as fast-food or a ready-to-eat meal. Lamb and veal consumption is the highest at fine-dining restaurants.



Base: Eat Away From Home At These Locations: Chicken (n=531), Pork (n=340), Lamb (n=409), Veal (n=438)

Q38/Q39/Q40/Q41. Thinking of all the times you ate at a fast food restaurant / Ready-to-Eat meal / Family restaurant / Fine dining restaurant in the past 12 months, what proportion of those occasions did you order [chicken/pork/lamb/veal]? Please think of all meals, including breakfast, lunch and dinner.

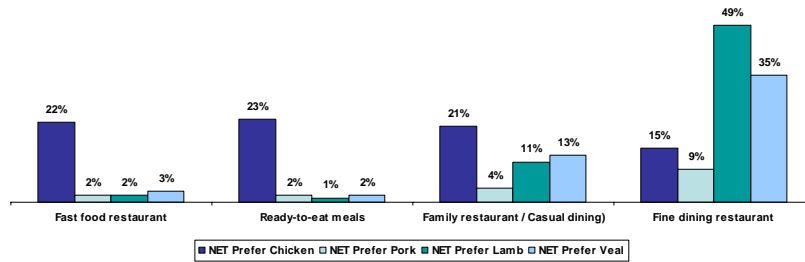
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Preference For Chicken, Lamb, Pork, and Veal By Location

Respondents Who Eat Meat Away From Home At These Locations

- In terms of preference by restaurant type, chicken performs extremely well in fast food, ready to eat meals from grocery and family dining.
- Lamb and veal are, by far, the most preferred meats at fine dining restaurants.



Base: Chicken Consumers Who Ate Chicken Away From Home At These Locations

Q37. Please indicate how strongly you prefer to eat [chicken/pork/lamb/veal] prepared away from home at each of the following locations. Please use a scale from 1 to 10, where 1 means 'I strongly prefer other meats at this location' and 10 means 'I strongly prefer chicken at this location'.

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- Thank you for the opportunity to work with you.
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