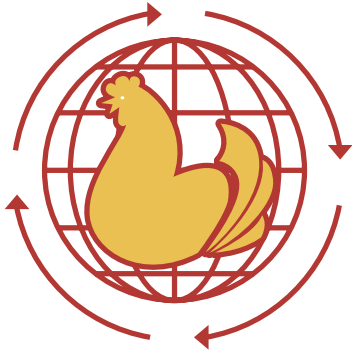




SUSTAINABILITY & CHICKEN PRODUCTION

RESULTS & LEARNINGS OF A PERCEPTION BENCHMARK SURVEY

OVERVIEW



Sustainability. It's now considered 'table stakes' for the food Americans buy and eat. But, how deeply do consumers understand sustainable food practices—and what do they expect from the chicken industry? In early 2019, The National Chicken Council (NCC) set out to help answer these questions through a nationwide survey of general consumers and food eVangelists, top influencers in shaping food conversations. Not surprisingly, knowledge of the environmental impact of the chicken industry is low. However, environmental impact is quickly "closing the gap" on factors people care about when it comes to driving purchase decisions. As an industry, we have important work ahead of us to help consumers learn more about what chicken producers are doing today to take care of the environment for the future.

OUR OBJECTIVES

- Better understand perceptions and attitudes related to chicken production and its impact on the environment.
- Inform message development to ensure Chicken Check In content related to sustainability resonates with consumers and food eVangelists.
- Listen to the voice of consumers/food eVangelists and what is driving their attitudes and perceptions of the chicken industry (and its impact on the environment).

WHO WE SURVEYED

- **n=1,000 Census-representative Americans** aged 18-64 who eat chicken (excluding those who feel extremely positively or negatively about food practices).
- **n=500 Food eVangelists**—Americans who are particularly influential about food-related topics. They share their opinions related to agriculture practices with others (regularly) and care more how their food is produced.

METHODOLOGY

- 15-minute online survey (fielded January 14-23, 2019).

TOP INSIGHTS

1. **Not surprisingly, knowledge of the environmental impact of the chicken industry is low.**
2. **Environmental impact of chicken is as important as animal welfare—when it comes to factors driving purchasing decisions.**
3. **Half (49%) of survey participants indicate a willingness to eat more chicken if they learned it is more sustainable than other meats or meat substitutes.**
4. **Chicken is viewed as having roughly the same environmental impact as other meats (beef and pork specifically).**
5. **Most important sustainability topics related to chicken production: Water (contamination and usage), greenhouse gas emissions and shipping.**
6. **Misinformation about hormones is extensive—even among those who think they are knowledgeable.**





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KEY FINDINGS

PERCEPTIONS & ATTITUDES RELATED TO CHICKEN PRODUCTION & ITS IMPACT ON THE ENVIRONMENT

Benchmarking perceptions and attitudes related to chicken production and its impact on the environment is key to building meaningful programming and communication strategies that can deliver accurate information to consumers and influencers in ways that will resonate and, ultimately, build trust.

Not surprisingly, knowledge of the environmental impact of the chicken industry is low.

- While most are familiar with topics related to animal welfare and processing—a nod to industry efforts to increase transparency around animal welfare topics—knowledge related to sustainability topics in the industry like **water usage (20%)**, **greenhouse gas emissions (21%)** and **clean water impact/water contamination (19%)** is limited.
- **Only half (51%)** of survey participants are moderately knowledgeable about chicken's impact on the environment, while **three-quarters (71%)** are moderately knowledgeable about how chicken is produced—indicating there is work to be done to tell chicken's sustainability story.



When it comes to factors driving purchase decisions today, **the environmental impact of chicken (34%) is as important as animal welfare (37%)**.

- Of note, **taste (82%)** and **price (65%)** continue to be the top two drivers of purchase decisions.
- **Food eVangelists** are more likely to rank sustainability as extremely or very important than the general population (52% vs 34%)—indicating that sustainability is likely to continue to be a top conversation driver and shape perceptions of the industry.

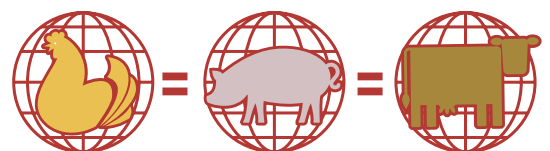


Roughly half of survey respondents (49%) would eat more chicken if they learned that it was more sustainable than other meats or meat substitutes.

- And **45%** say they would eat more chicken if they learned that chicken production has become more sustainable in response to consumer demand.

Chicken is viewed as having roughly the same environmental impact as beef and pork.

- Percentage who rate each protein as having **at least moderate environmental impact**: beef (71%), pork (68%) and chicken (66%).





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KEY FINDINGS

LISTEN TO THE VOICE OF CONSUMERS/FOOD EVANGELISTS & WHAT IS DRIVING THEIR PERCEPTIONS OF THE CHICKEN INDUSTRY

Gaining trust among consumers and influencers starts with the simple act of listening. Listening to how, when, where and from whom our key audiences are tuned in is the first step to understanding what drives their perceptions (and misperceptions) of the industry. Based on these insights, the industry can then better hone in on the points of activation and communication strategies that can get attention, help shape more accurate perceptions and gain trust.

- **71% feel positively towards family farms**, while only 35% feel the same towards corporate farms.
- Voices who are viewed as independent, like **medical doctors (67%), scientists at universities (60%) and government food safety regulators (50%), are more widely trusted** than food companies (31%) and scientists at for-profit companies (28%).
- High scores associated with TV news, TV ads, and YouTube all point to the importance of video content in reaching both consumers and food eVangelists.
- Facebook is a particularly strong source of information about broiler chickens, particularly among **food eVangelists** (21% rank the social platform as a top source of information about broiler chickens).



KEY FINDINGS

ENVIRONMENTAL TOPICS: SUSTAINABILITY MESSAGING

Misconceptions abound surrounding the effects of chicken production on key environmental issues like pollution, water quality and transportation. These are key topics to address via content and programming to help consumers better understand these issues in relation to sustainability practices in place on farms across the nation.

Water issues are seen as having high environmental impact, but consumers are less knowledgeable about them.

- **Clean water impact/water contamination (74%) and water usage (69%)** are seen as **high environmental costs**, but current knowledge on both is low at 34% and 36%, respectively.



Greenhouse gas emissions and shipping are seen as having moderate environmental impact, but also most consumers have significantly less knowledge than average about these practices for chicken production.