

nielsen

CONSUMER REACTION TO OMEGA-3 CHICKEN

CONSUMER SURVEY



Nielsen Perishables Group

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For questions about
this study, contact:

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OVERVIEW

SITUATION

- Research shows that Omega 3's can help lower triglycerides and blood pressure and may help with other conditions. Chickens fed a diet rich in flaxseed produce meat that is higher in Omega-3 fatty acids. O&T Farms believes Omega-3 chicken would provide consumers a way to increase their Omega-3 consumption.

QUESTIONS

- O&T Farms wants to better understand consumers' knowledge of Omega-3's and their desire for healthier foods in order to provide the industry with proof of the potential opportunity for Omega-3 chicken, and possibly other Omega-3 enriched proteins, including turkey and beef.
- Specific to consumers, O&T Farms wants to understand shoppers' current behavior regarding foods with specific health characteristics, gauge their level of interest in Omega-3 chicken, and determine their willingness to pay a premium.

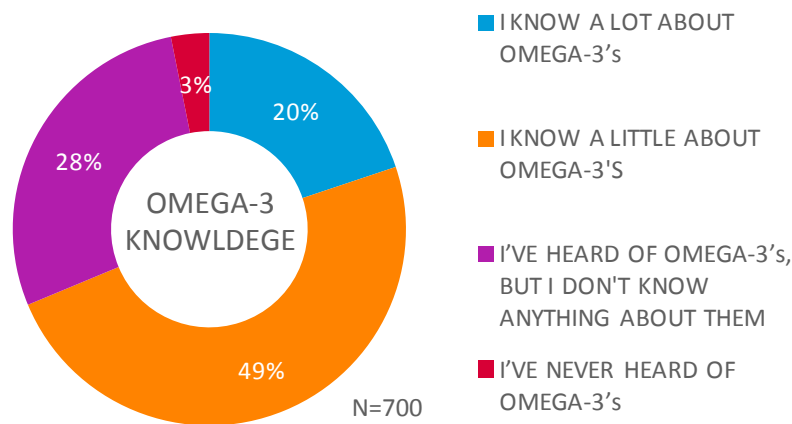
APPROACH

- Nielsen Perishables Group conducted a two-part study. The first step was a chicken category review to understand the category and opportunities. This document provides a foundation of knowledge of the chicken category, including an analysis of category performance trends and drivers along with consumer shopping behavior.
- In the second phase of the study, Nielsen Perishables Group conducted an internet survey of 700 chicken consumers across the U.S., including 200 who shop natural/special stores. This survey includes a nationally representative sample and provides insight into shopping behaviors, preferences, awareness and perceptions of an Omega-3 chicken. The results of the consumer survey phase of the study are included in this report.

KNOWLEDGE OF OMEGA-3'S

Nearly 80% of consumers claim to know about Omega-3's

How much would you say you know about Omega-3's?



97% of consumers have heard of Omega 3's

90% of **natural/specialty store** shoppers claim to know a lot or a little about Omega-3's compared to 60% of those who shop other stores

79% of consumers earning **more than \$75,000** claim to know a lot or a little about Omega-3's

78% of those living in a **large city** claim to know a lot or a little about Omega-3's compared to 57% of those in rural areas

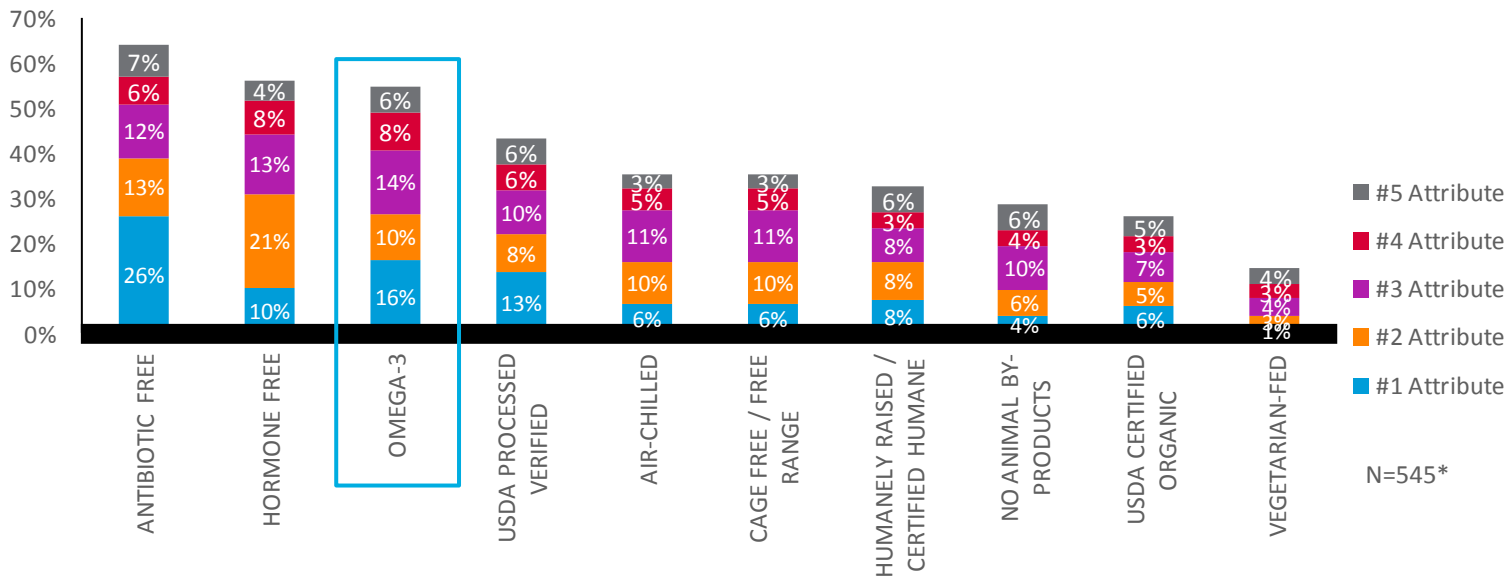
74% of consumers from the **West** and 73% of those from the **Northeast** claim to know a lot or a little about Omega-3's

A majority of consumers believe they are knowledgeable about Omega-3's

CHICKEN: ATTRIBUTE IMPORTANCE

After learning about Omega-3 chicken, consumers rated Omega-3's high on their list of production-oriented attributes

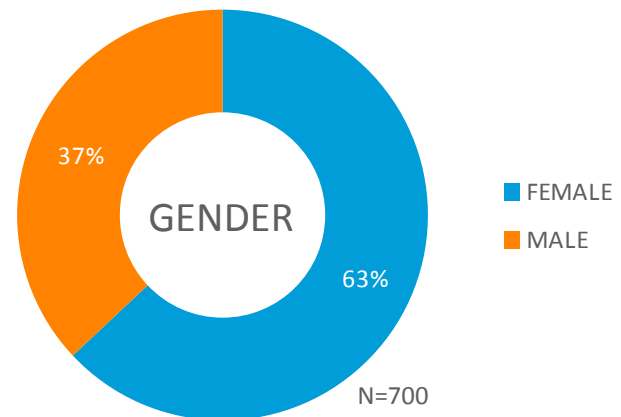
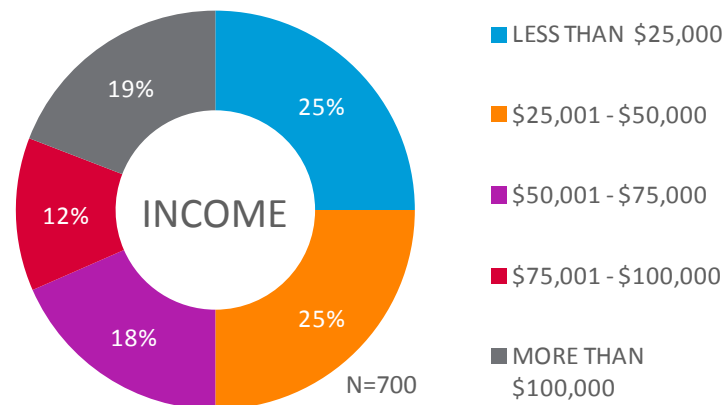
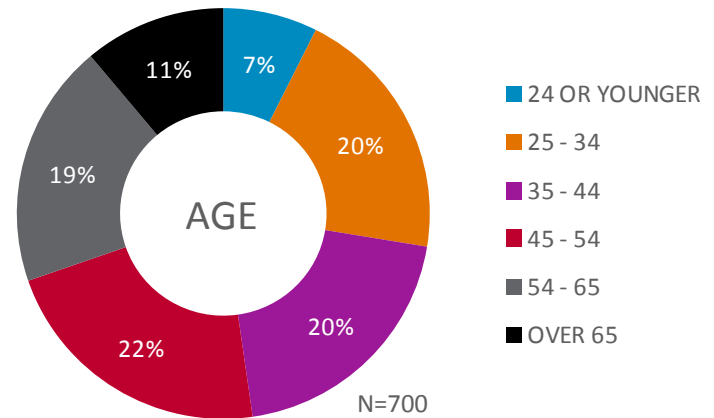
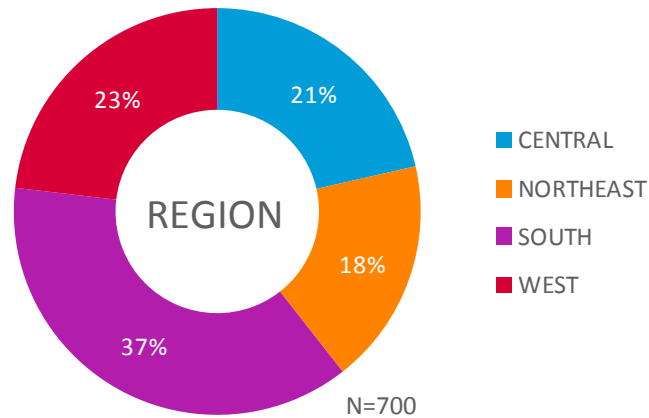
Now including Omega-3 chicken, what are the five most important production-oriented?



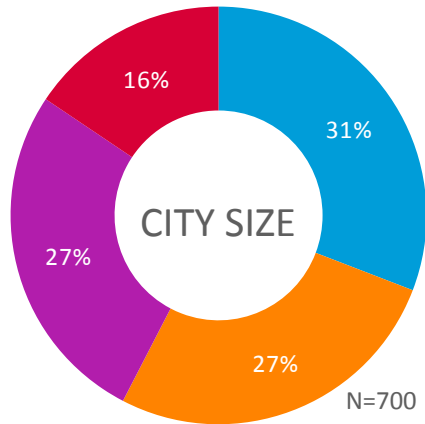
55% rated Omega-3 as one of the top five production-oriented attributes

DEMOGRAPHIC PROFILE

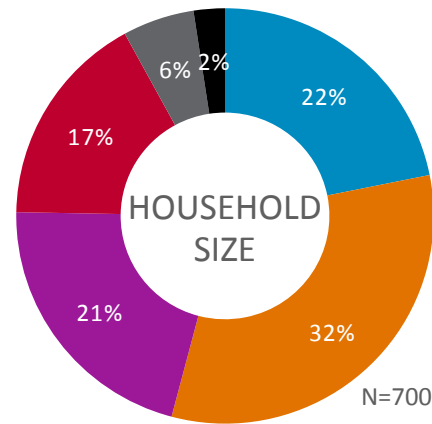
Approximately representative sample for region, age and income



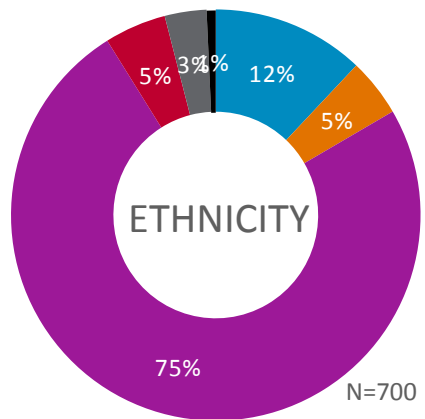
DEMOGRAPHIC PROFILE



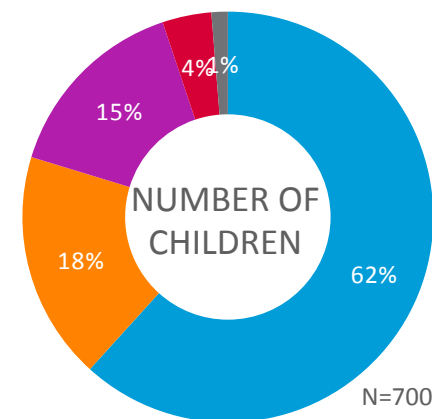
- LARGE CITY
- SMALLER CITY OR TOWN
- SUBURBS OF LARGE CITY
- RURAL AREA



- 1 PERSON
- 2 PEOPLE
- 3 PEOPLE
- 4 PEOPLE
- 5 PEOPLE
- 6 OR MORE



- AFRICAN AMERICAN
- ASIAN
- CAUCASIAN
- HISPANIC
- OTHER
- DECLINE TO STATE



- NO CHILDREN
- 1 CHILD
- 2 CHILDREN
- 3 CHILDREN
- 4 CHILDREN



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