CONSUMER SURVEY OF ATTITUDES AND PURCHASE BEHAVIOR REGARDING FRESH VERSUS FROZEN CHICKEN

John P. Nichols and Robert E. Branson

Texas Agricultural Market Research and Development Center

Texas A&M University

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This research project was designed to examine the attitudes of consumers toward the purchase and usage of frozen chicken products. An initial series of group and personal in-depth interviews were conducted in the Ft. Worth market to provide information to use as a basis for design of the interview schedule. Ft. Worth was selected because of its exposure in recent years to a variety of frozen chicken products. A total of 206 telephone individual interviews were completed in the consumer survey to provide information for this analysis. The sample was selected on a probability basis from the most recent criss-cross directory. Two alternates were selected for each original sample number to control sample substitutions. Interviewing was by a professional interviewing service in Ft. Worth.

Review of Results

Usage of Chicken

Of the total sample interviewed 96 percent are chicken users. Of the chicken users 34 percent have purchased some frozen chicken products. These frozen chicken users tend to be a slightly greater percentage among the higher income groups, Table 1. The housewives also are more in the middle age groups. While the youngest (under 26) and oldest (over 60) tended toward not purchasing frozen chicken. Larger family sizes are

TABLE 1. Frozen Chicken Users By Income Level

Income Thousands $	% of Households
0- 3	27
3- 5	32
5- 8	33
8-10	38
10-15	43
15 and over	27

also associated with an increase in the usage of frozen chicken. One exception is single person households which also show more incidence of frozen chicken purchases.

Whole chicken is still by far the most popular product in general. Of all chicken users only 32 percent infrequently or never purchased whole fresh chicken while 67 percent fell in the same category with regard to fresh parts. This relationship does not hold up for frozen chicken, however, as 70 percent of the frozen chicken users infrequently or never bought whole frozen chicken while 67 percent fell into this category for frozen parts, Table 2.

Users of fresh parts tended to be associated with the higher income groups while age of the housewife has little relationship. Users of frozen parts seem to be more definitely related to the higher income groups while their age tends to fall more in the middle age groups.

Over 70 percent of the respondents listed "fried chicken" as their most frequent method of preparing chicken. There was no great difference in this between fresh and frozen users. Income level made little difference except that the highest income groups also listed barbequing as a frequent method of preparation. Those over 60 years old showed a marked decrease in preparation of fried chicken and an increase in baked chicken. Other than this, age shows no relationship, Table 3.

Frozen versus Fresh concepts

More than 90 percent of the respondents freeze beef at home after having purchased it fresh in the store. About 61 percent do this "all of the time." A smaller proportion do this with chicken. Eighty-five percent do freeze chicken at home while 51 percent do it "all of the time."

TABLE 2. Fresh Versus Frozen
Chicken Purchases By Form Bought

Frequency	Whole Fresh	Whole Frozen	Whole Cut-up Fresh	Whole Cut-up Frozen	Parts Fresh	Parts Frozen
	Percent Buying[1/]					
Weekly	37	9	13	3	12	7
2-3 monthly	19	4	8	7	11	10
1 per month	7	9	5	6	6	6
1-2 each 3 month	5	7	3	6	5	9
Infrequent or never	32	70	71	78	67	67

1/ a.) Percent in fresh column is based on those using chicken (n=197).

b.) Percent in frozen column is based only on those using frozen chicken (n=67).

TABLE 3. Method of Preparing Frozen Chicken

Method	Percent Using
Fried	71
Baked	12
Barbequed	2
Casserole	2
Roasted	1
"shake and bake"	1
Other	12

Age and income do not appear to affect this behavior. However, it does appear that those with larger households tend to freeze chicken at home more frequently.

The frequent method of thawing chicken is allowing it to defrost at room temperature. The higher income groups tend to use water for defrosting of chicken as well. About 50 percent of the respondents have cooked meat directly from the frozen state but only 2 percent have done this with chicken. About 60 percent of the respondents felt that they would like to have directions for direct cooking frozen chicken. Seventy percent said they would find directions for quick-thawing procedures helpful, Table 4.

Whether the consumer preferred fresh or frozen chicken, if the chicken is quick frozen immediately after processing, elicited an almost even split in replies.

Prefer fresh chicken	54
Prefer frozen chicken	46

Reason for choosing was, in both cases, belief that the form selected would be the fresher of the two. The fact that the frozen chicken was put in the store 10 days later, rather than 2 days later, strengthened the selection of frozen somewhat. We believe, however, that there was a "read-off" into thinking the fresh chicken was also older in this case.

About half of those interviewed felt that frozen chicken parts were not as good as fresh parts. Thirty to thirty-five percent according to income or age said the two were equal. Ten to twenty percent, varying by age and income, said the frozen was better in quality.

There is presently a stronger belief of superior convenience in frozen chicken parts--some 30 percent agreeing--than in superior quality of frozen parts, which was 10-20 percent depending upon age and income.

TABLE 4. Percent of Respondents Desiring Reliable Directions for Direct-Cooking or Thawing of Frozen Chicken.

Response	Directions for Direct-Cooking	Directions for Quick-Thawing
	- - - - - - - - -percent	- - - - -
Yes	60	70
No	32	36
Don't know	6	3
Not applicable	2	1

Package Preference

There was a reported major preference for frozen chicken parts in a plastic bag. Some 70 percent selected this package. Another 23 percent wanted a box with a window for product visibility. Only 5 percent choose a closed box.

Pricing

Wide variations of opinions were expressed as to the retail price of frozen or fresh chicken parts. The spread was the result, apparently, of guesses by the nearly 50 percent who seldom or never buy the product. In view of this, the average price seems to be more meaningful. The averages reveal that a somewhat higher price is expected for frozen chicken.

Fresh drumsticks were estimated to be 49 cents per pound and frozen ones 52 cents. The average price estimates for fresh breasts was 64 cents per pound while the estimate for frozen breasts was 70 cents per pound. In the Fort Worth market, selling frozen at matched prices with fresh chicken would add a great deal to market demand, according to other known facts about market performance there.

Brand Attitudes

Over 75 percent of the respondents felt that a brand name product in general is worth a few cents more. Only about 32 percent, however, felt there was any need, or advantage, in having a national brand of fresh chicken. About 37 percent felt this way about frozen chicken. Belief in national brands was greater among the younger age groups (under 30), Table 5.

With regard to the Pillsbury brand on fresh chicken, 78 percent of the responses were positive with 72 percent of the respondents saying they would buy it at least on a trial basis. A Pillsbury brand of frozen chicken drew positive responses from 65 percent of the respondents with 59 percent

TABLE 5. Do you see any need for Having a National Brand of Chicken

Age	"Yes" answers for Fresh Chicken	Frozen Chicken
	- - - Percent of Households - - -	
Under 20	50	50
21-25	50	58
26-30	50	50
31-45	28	38
46-60	29	31
61 and over	26	26

saying they would at least try the product. The positive responses to the other brands were in general 5 to 10 percent less than for the Pillsbury brand, Table 6.

In examining the responses to the Pillsbury brand for fresh chicken it is evident that there are proportionally more negative comments in the lower income levels and the older age groups. This relationship is not as evident in the responses to a Pillsbury brand of frozen chicken.

Conclusions

The conclusions which may be drawn from this brief preliminary report can be important in the development of a sound marketing strategy for the product market test. There are several and these may be enumerated as follows:

1. The key concern of the consumer in choosing between fresh and frozen chicken is belief in the relative "freshness" of the two. There was a considerable amount of disagreement among the respondents as to whether frozen or non-frozen chicken would actually be "fresher." This provides an opportunity to stress the concept of "quick frozen freshness."
2. Providing a basis for this kind of an approach is the 85 percent of the respondents who freeze chicken at home, by a less suitable method, after purchasing it fresh in the store. This approach may also build on the 70 percent of the respondents who use frozen vegetables and the 73 percent who regularly use frozen fruit juices. A believable marketing program could tie into these respondents.

TABLE 6. Attitudes Toward Pillsbury and Other National Brands of Chicken

	All Positive Responses	All Negative Responses	Would buy	Would Not buy
	Percent			
Pillsbury				
Fresh	78	5	72	5
Frozen	65	20	59	20
Other Brands 1/				
Fresh	2/	2/	66	10
Frozen	2/	2/	53	22

1/ Betty Crocker and Duncan Hines.

2/ Not available.

3. It appears that frozen parts are considered as more of a convenience product than a quality product. This indicates that convenience would provide a stronger believability base from which to launch a test marketing program. On the other hand, it also indicates that the "quality" image of the product should be reinforced. One opportunity to consider might be a "fully guaranteed product" approach at least in test marketing the product. If this were stressed in the program it may allay the fears of purchaser with doubts regarding quality.
4. The use of reliable and well tested directions and recipes for thawing and preparing the frozen product will provide additional support in gaining the confidence of the consumers. No authoritative information appears to have been available to them.
5. There is a great deal of importance attached to the visibility of the product from the consumer's point of view. The most appropriate package definitely would be a plastic bag which is resealable.
6. The expectations of the consumers with regard to relative prices of fresh and frozen parts indicates that there is some room for "premium" pricing. This is true also from the point of view of using a brand name. A difference in price of five to ten cents per pound may be acceptable for branded, frozen chicken parts relative to a non-brand fresh product. On the other hand, "equal to" pricing provides a further purchase incentive.

7. The Pillsbury brand appears to have a strong positive image with the consumer. It definitely should provide a "plus" to marketing a frozen chicken product.