CHICKEN 2035: Anticipating TRENDS, Adapting STRATEGIES

CHICKEN MARKETING SUMMIT

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Renaissance Birmingham Ross Bridge Golf Resort & Spa

2024 Chicken Consumer Perspective: Drivers, trends & predictions for 2035

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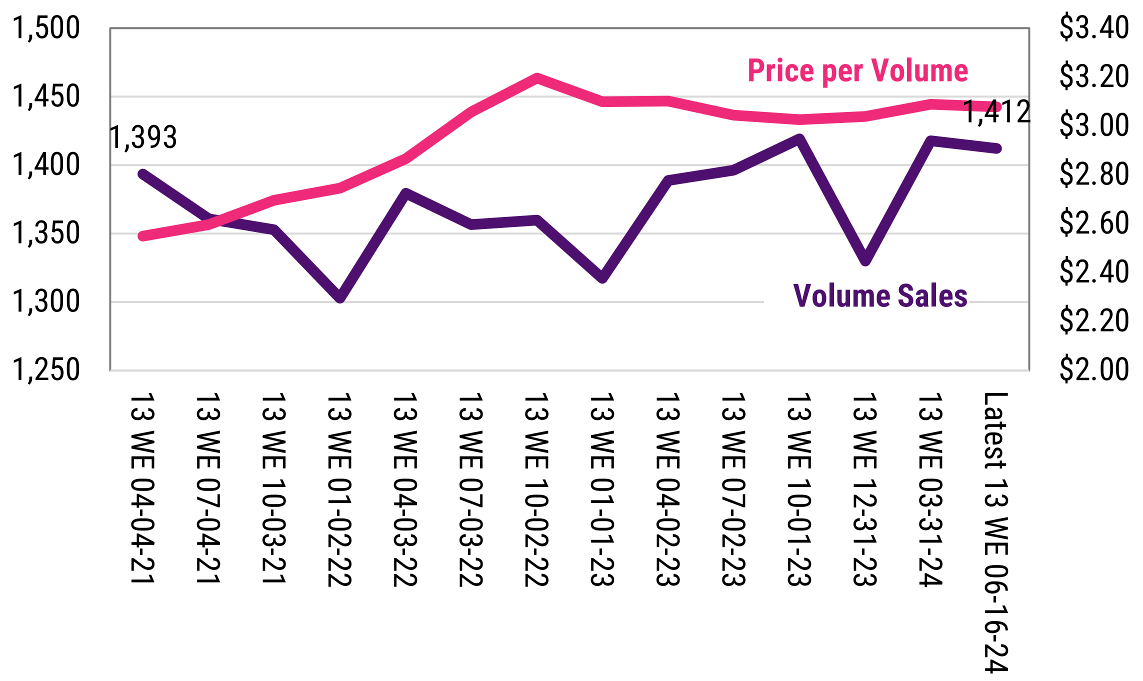
Agenda

- Macro: Chicken remains dominant in today’s marketplace
- Back to the Future & Innovation Adoption
- 2024 Consumer Research Results
- Foodservice Trends to Watch
- Takeaways & The Next Big Thing(s)

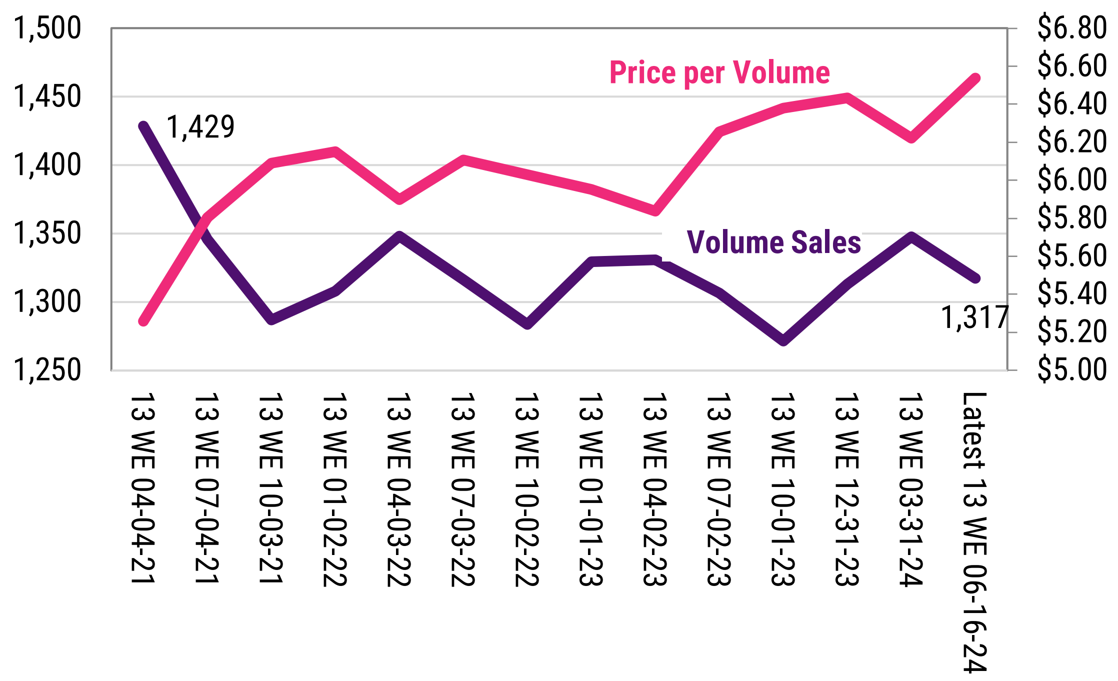
Macro Snapshot

Chicken prices stabilized slightly above $3; beef continues to climb.

Chicken
Volume (in MM pounds) vs. Price Per Volume



Beef
Volume (in MM pounds) vs. Price Per Volume

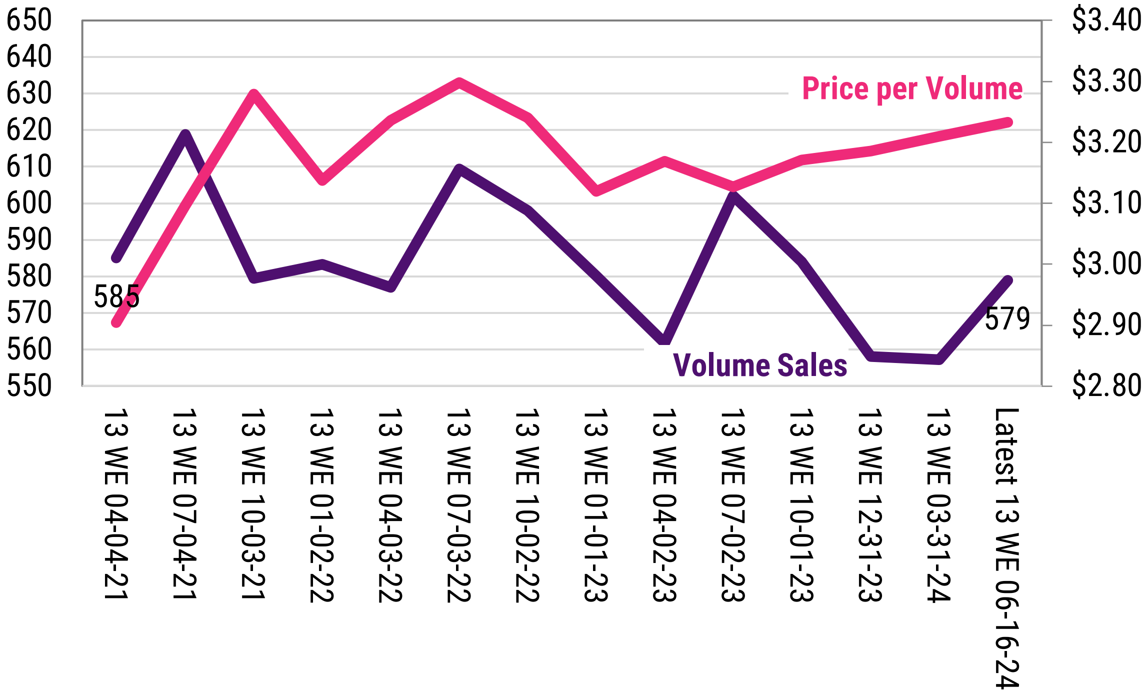


Circana Integrated Fresh MA Database – 1/1/2020 – 6/16/2024

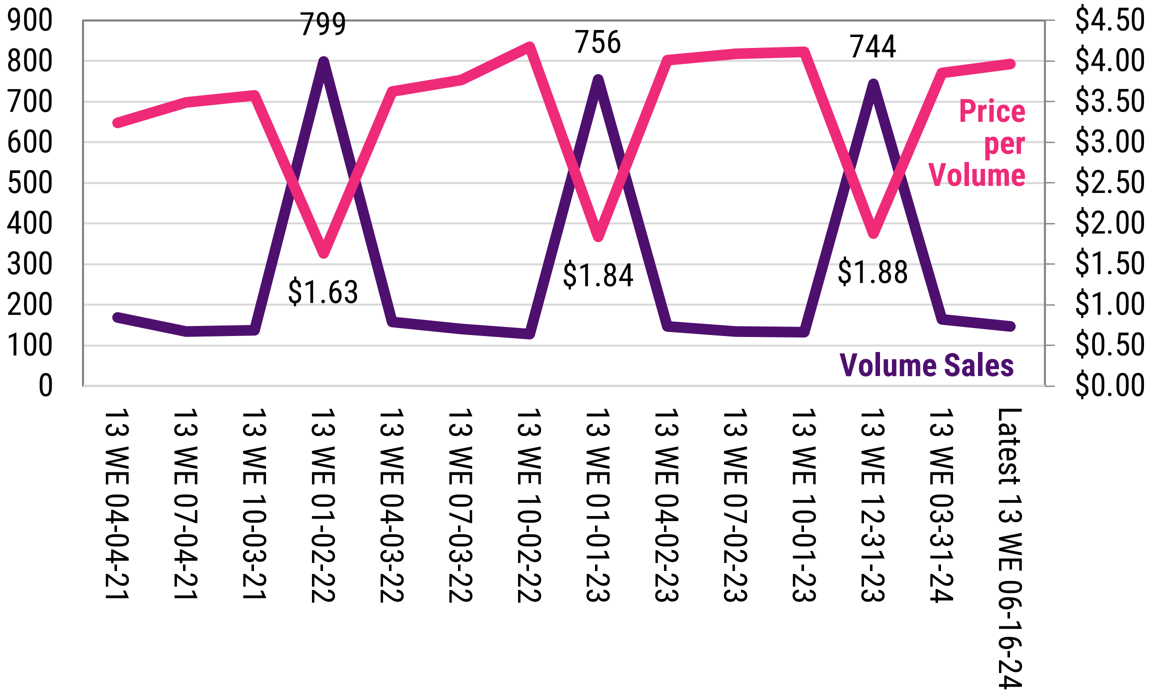
Pork sales continue to decline

While Turkey's each seasonal peak for Turkey is below the previous one

Pork
Volume (in MM pounds) vs. Price Per Volume



Turkey
Volume (in MM pounds) vs. Price Per Volume



Circana Integrated Fresh MA Database – 1/1/2020 – 6/16/2024

Fresh chicken lead dollar sales growth across generations vs. 2 years ago

LEADS ALL FRESH PROTEINS





	All HH Generation		Gen Z & Younger Millennials (1988-1997)		Millennials-Older (Born 1981-1989)		Generation X (Born 1965-1980)		Boomers (Born 1946-1964)		Seniors and Retirees (Born 1925-1945)	
	% CHANGE											
	vs. YA	vs. 2 YA	vs. YA	vs. 2 YA	vs. YA	vs. 2 YA	vs. YA	vs. 2 YA	vs. YA	vs. 2 YA	vs. YA	vs. 2 YA
Beef	5.5	7.3	38.4	42.2	4.9	7.2	5.4	6.8	-0.2	1.7	-11.1	-12.5
Chicken	3.6	16.6	27.2	42.8	1.1	13.3	1.7	15.3	-1.0	11.7	-8.7	-1.9
Pork	-2.5	-1.9	27.7	26.5	-7.5	-7.2	-1.7	0.4	-5.7	-4.6	-16.6	-20.6
Turkey	2.7	10.9	20.6	35.3	-3.1	2.7	3.7	12.7	1.2	9.0	-10.2	-7.7

Circana Integrated Panel Database – 52 Weeks Ending 6-2-24

The year 2030 marks a turning point for the U.S. population

HALF of
All Americans
will be Millennials,
Gen Z & Younger

These shoppers have lived in a world with the **internet, online shopping, smart phones and Mass / Supercenters and Club stores selling fresh groceries** –

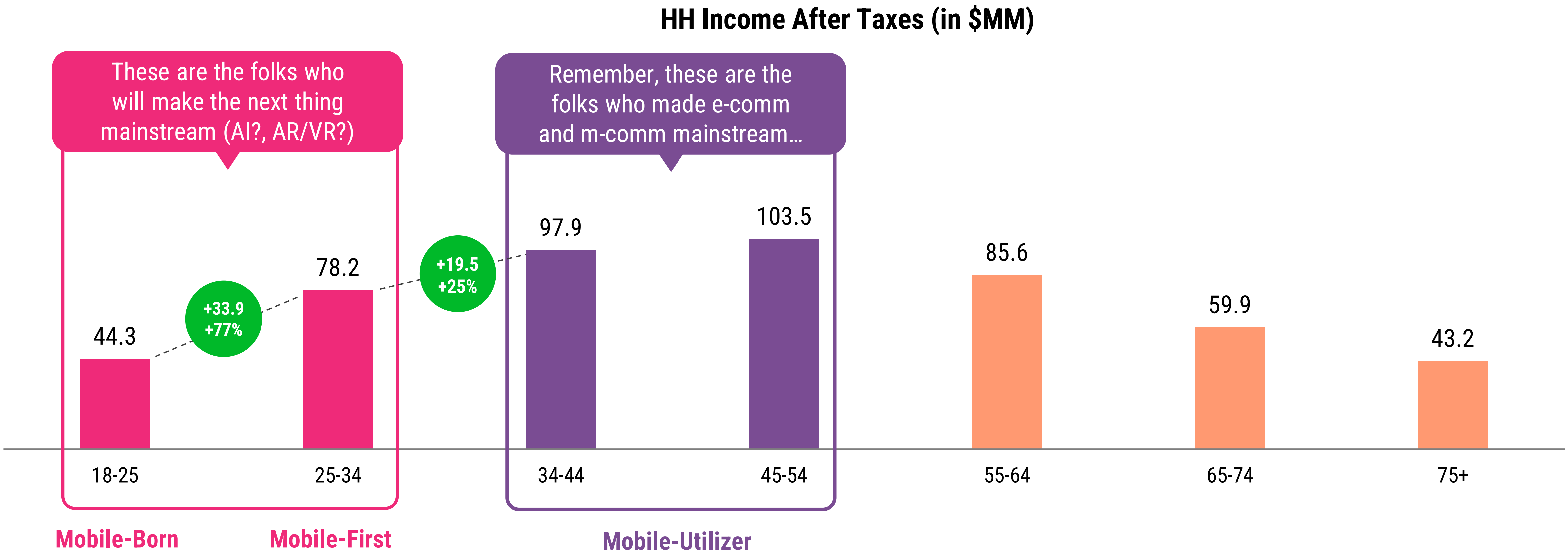
They are multi-cultural, diverse and much more open to new solutions.

Future-proof your fresh.

Source: 2030 population projection from www.census.gov

The two youngest groups are set to increase their income the most in the next 10 years

They are the folks who will make the next thing mainstream.

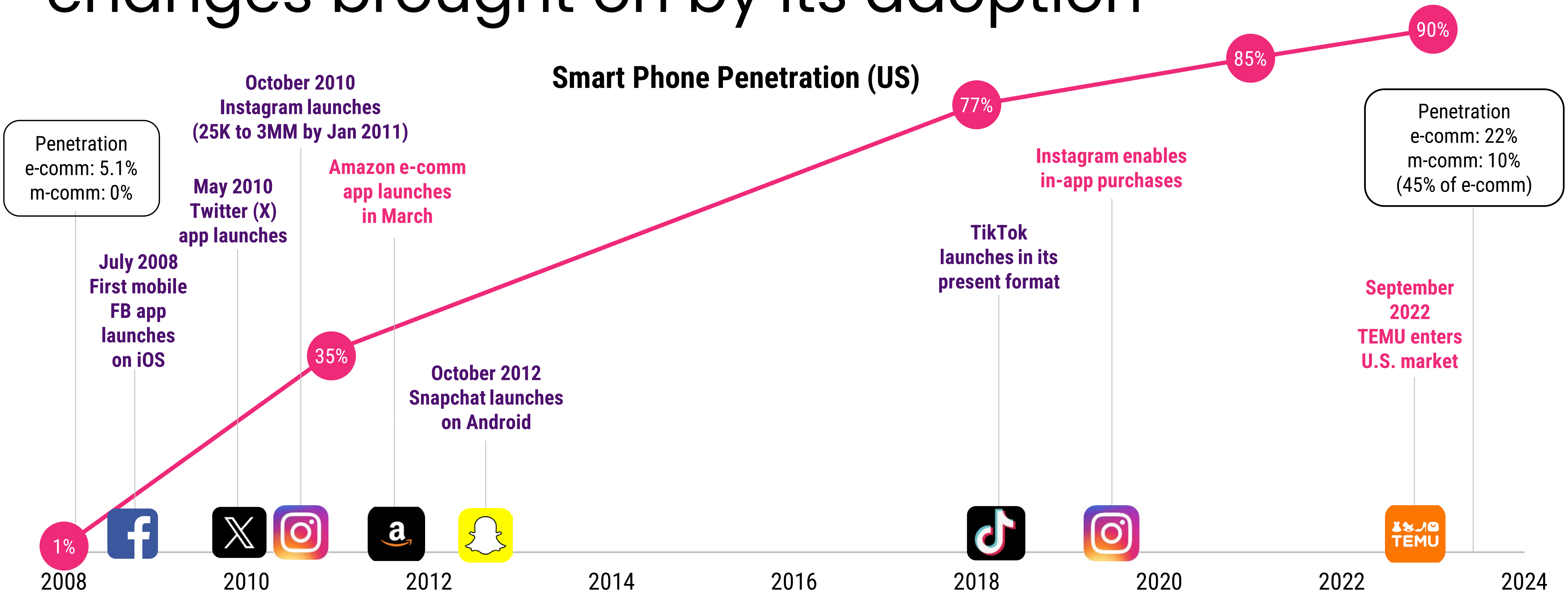


Consumer Expenditure Surveys, U.S. Bureau of Labor Statistics, September 2022

Back to the Future

Innovation Adoption

U.S. smart phone ownership and key changes brought on by its adoption



Adoption is accelerating, even in the kitchen

Air fryers climbed up to 67% ownership in 14 years; microwaves were still at 25% after 19 years

Air Fryers

2010: First consumer air fryer oven sold

2024: 67% of U.S. households own an air fryer

Proliferation was much faster than microwaves

Microwaves

1967: First consumer microwave oven sold

1986: 25% of U.S. households own a microwave

1997: 90% of U.S. households own a microwave

A few recent paradigm shifts in consumer's life:

replaced LOCAL GROCERY STORES

replaced LOCAL BOOKSTORES

replaced BLOCKBUSTER


replaced CASSETTE TAPES


replaced CDs

replaced MP3 PLAYERS


replaced


The Consumer Speaks

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Research
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Survey Methodology

Survey Sample

N= 620 Fresh Chicken Buyers

Gen Z to Younger Boomers

ages 18-67

Custom Survey

- Online survey fielded June 28-July 6, 2024
- A custom online survey was fielded to better understand the consumer of 2035 with regards to protein consumption.
- The overarching goal is to compare and contrast generational cohorts, to isolate how the consumer of 2035 will be choosing, buying, and preparing proteins.

Gen Z	Under 27	n=99
Younger Millennial	Ages 27-33	n=105
Older Millennial	Ages 34-42	n=101
Gen X	Ages 43-58	n=165
Younger Boomers	Ages 59-67	n=150

What makes Gen Z unique?

Largest Generation Ever

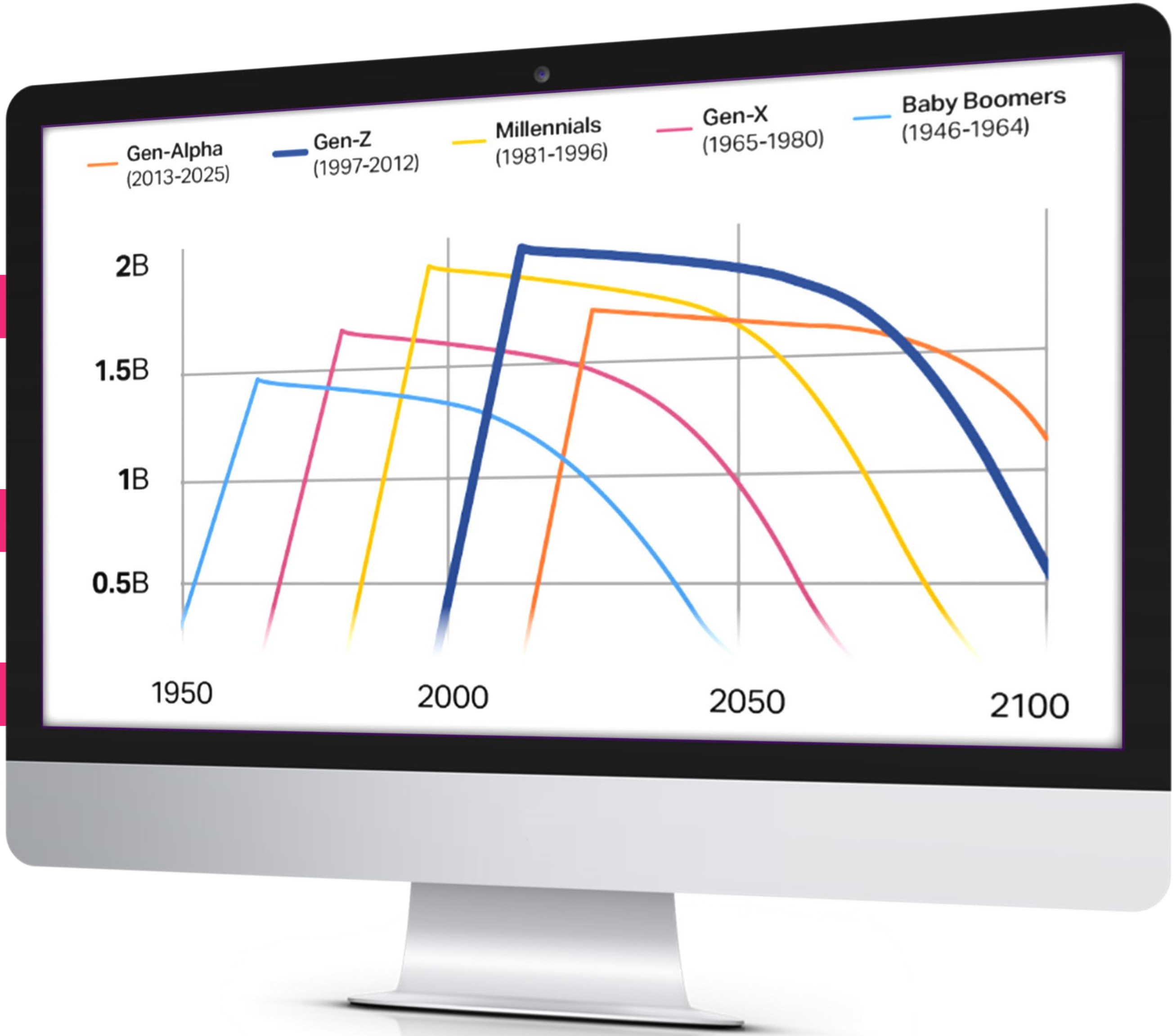
Currently at 25% of the global population (2 billion), Gen Z will be the largest in history.

Fastest-Growing Spend

Gen Z spend will overtake Boomer spend by 2029.

First Truly Digital Natives

"Glued to their devices," Gen Z has never known a life without immediate, open access to technology. Unprecedented access to global communications platforms to influence and be influenced by thoughts from around the world.



World Data Lab, Generations Forecasts

Five Core Values Drive Gen Z Behavior

01 | SIMPLICITY

Authenticity, Convenience, transparency, straightforward value propositions (‘what’s in it for me?”), seeking work-life balance

02 | STABILITY

Consistent quality, trusted brands. Nostalgic.
Economic pessimism drives need for value, affordability

03 | SOCIALITY

Spending time with family & friends. In-person interactions and social experiences

04 | SUSTAINABILITY

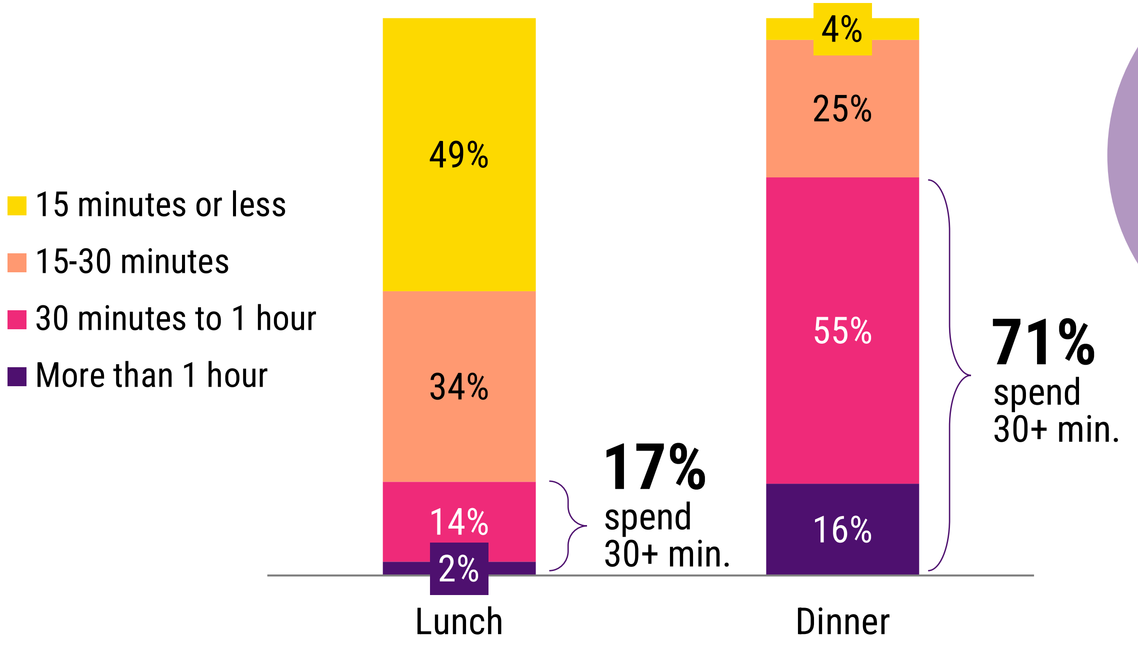
70% of Gen Z consider sustainability when making a purchase and say they are willing to pay a premium for sustainable products

05 | HEALTH & WELLNESS

Drives preferences for natural and organic foods. Extends to mental health, “treat myself” to comfort foods, indulgences, self-care

Quick prep time is a critical unmet need for many fresh chicken consumers

Despite prioritization on fast prep time (30 min or less), majority spend 30+ minutes preparing dinner



60%
"Fast prep time (30 minutes or less) is a priority right now"

National Chicken Council Conference Survey 2024
Q1: Excluding special occasions, how much time do you typically spend preparing lunch and dinner? Include time spent on food prep and cooking. Your best guess is fine.
Q2: When it comes to food preparation, which of these are a priority for you and your household?

Younger cohorts prioritize quick preparation.

Fast prep time is a priority for younger cohorts, now and likely in the future.

Gen Z
Under 27

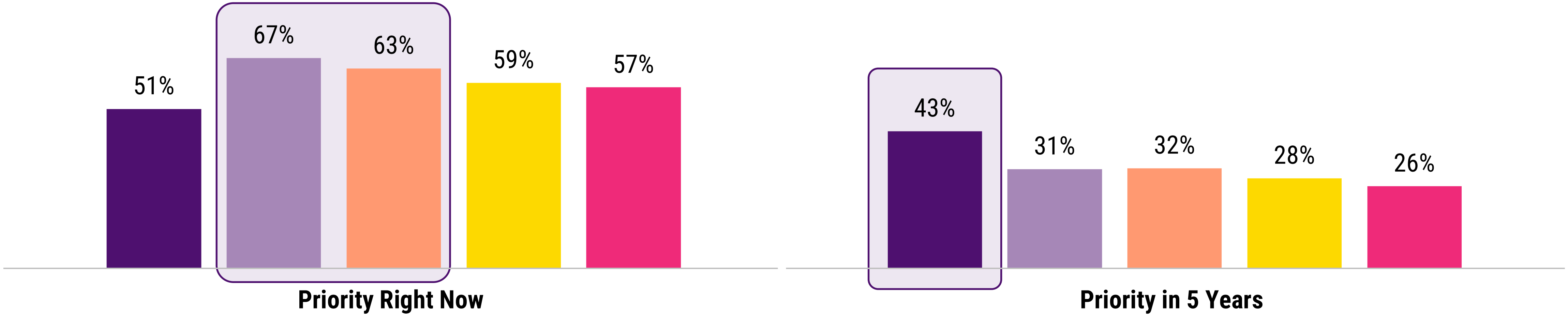
Younger Millennial
Ages 27-33

Older Millennial
Ages 34-42

Gen X
Ages43-58

Younger Boomers
Ages 59-67

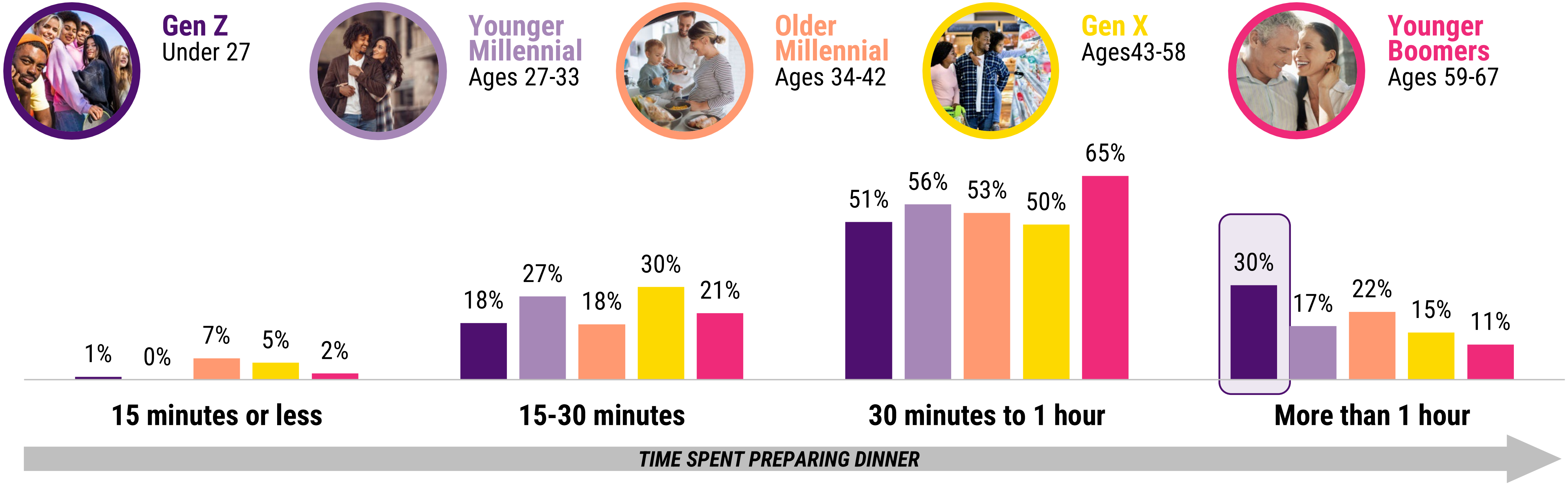
Fast Prep Time (30 Minutes or Less)



National Chicken Council Conference Survey 2024
Q2: When it comes to food preparation, which of these are a priority for you and your household?

There’s opportunity to appeal to Gen Z with time-saving solutions

Gen Z spend the most time preparing dinner; almost a third spend an hour or more on a typical evening meal



National Chicken Council Conference Survey 2024

Q1: Excluding special occasions, how much time do you typically spend preparing dinner? Include time spent on food prep and cooking. Your best guess is fine.

Beyond speed, Gen Z indicate a growing need for meal prep, global flavors, minimal clean-up

Meal prep, speed, kits and optimized packaging are especially appealing to GenZ





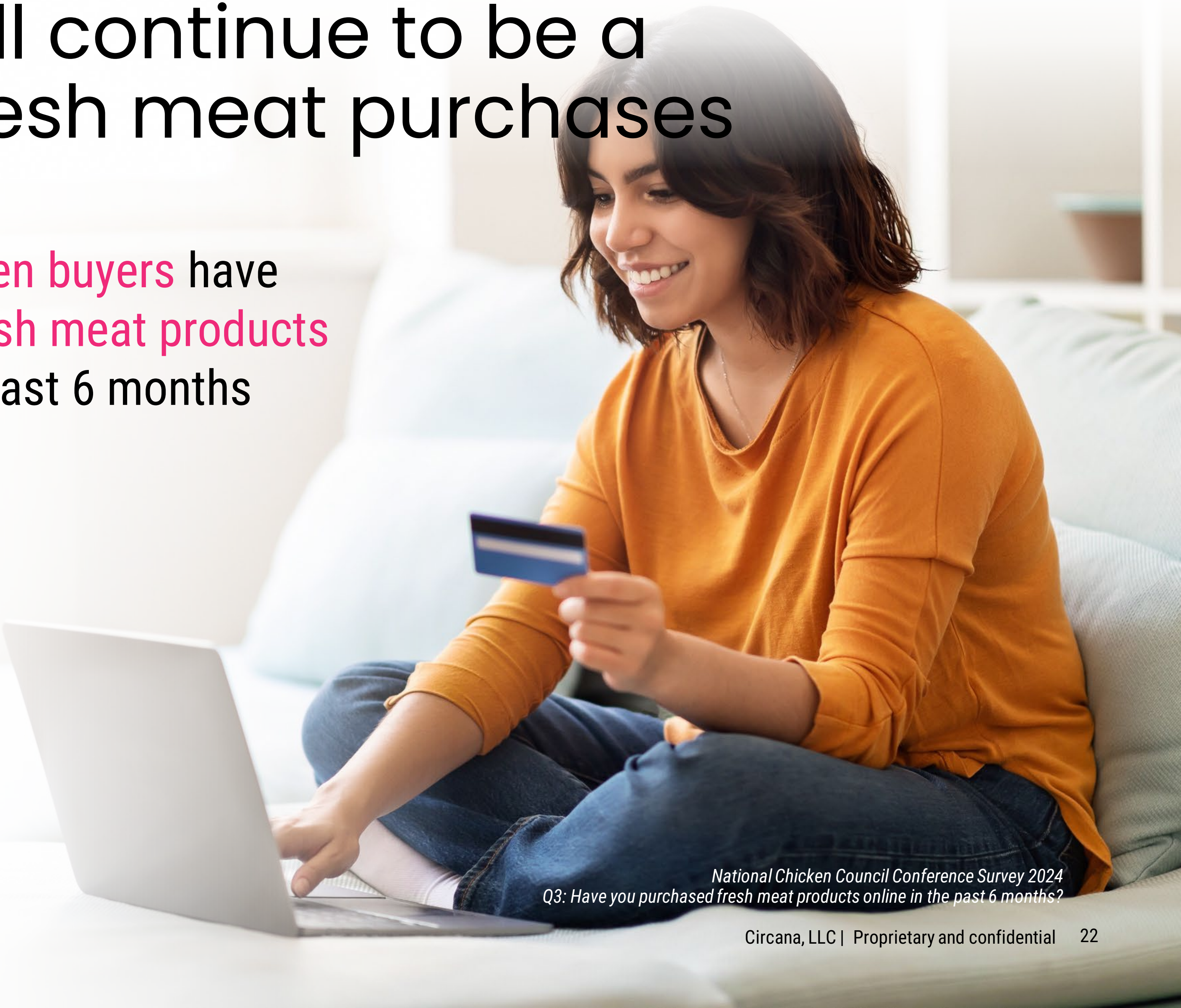
Food Prep Priorities in the Next 5 Years	**Gen Z** *Under 27*	**Younger Millennial** *Ages 27-33*	**Older Millennial** *Ages 34-42*	**Gen X** *Ages 43-58*	**Younger Boomers** *Ages 59-67*
Meal prep (making pre-portioned meals for the week)	**45%**	**38%**	35%	28%	30%
Fast prep time (30 minutes or less)	**43%**	31%	32%	28%	26%
Meal kits with everything you need to make the meal	38%	37%	30%	29%	29%
Meal kits with ingredients and **flavors from around the world**	**37%**	29%	**45%**	28%	22%
Packaging that offers **no mess** or clean-up	**37%**	32%	32%	27%	25%
Packaging with a **QR code** to get more info on preparation, recipes, nutrition, etc.	**33%**	22%	**32%**	27%	20%
Individual-sized portions	31%	32%	23%	31%	25%
Pre-cut fresh meat, vegetables, etc. (no slicing needed)	31%	27%	26%	26%	24%

National Chicken Council Conference Survey 2024
Q2: When it comes to food preparation, which of these are a priority for you and your household?

Online channels will continue to be a growth driver for fresh meat purchases

45% of **fresh chicken buyers** have purchased **fresh meat products online** in the past 6 months

- **58%** **Gen Z** | Under 27
- **55%** **Younger Millennial** | Ages 27-33
- **56%** **Older Millennial** | Ages 34-42
- **44%** **Gen X** | Ages 43-58
- **25%** **Younger Boomers** | Ages 59-67



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National Chicken Council Conference Survey 2024
Q3: Have you purchased fresh meat products online in the past 6 months?

Reassure product safety to encourage online purchasing among non-buyers

Safe, affordable transport and delivery are key concerns to alleviate

Online Fresh Meat Purchase Motivators (among those who have not purchased online in P6M N=343)

National Chicken Council Conference Survey 2024
Q3A: Which of the following, if any, would motivate you to buy fresh meat products online?

AI plays a growing role in grocery purchases.

A third of fresh chicken consumers use AI tools. Unsurprisingly, adoption is highest among Gen Z.

33%* **use AI tools to aid purchase decisions**

52% **Gen Z** | Under 27

41% **Younger Millennial** | Ages 27-33

45% **Older Millennial** | Ages 34-42

35% **Gen X** | Ages 43-58

12% **Younger Boomers** | Ages 59-67

19% | Voice-activated assistant (e.g., Siri, Alexa, etc.)

14% | ChatGPT

12% | AI recipe generator (e.g., ChefGPT, Dishgen, etc.)

10% | Google Gemini

1% | Other AI-enabled smart phone app

National Chicken Council Conference Survey 2024

** Net score includes those who mentioned at least one tool.*

Q4: Which of the following, if any, do you currently use to make purchase decisions for food prepared at home?

There’s strong openness to plant-based options among fresh chicken consumers

34% of fresh chicken consumers have purchased plant-based meat alternatives in the past 6 months

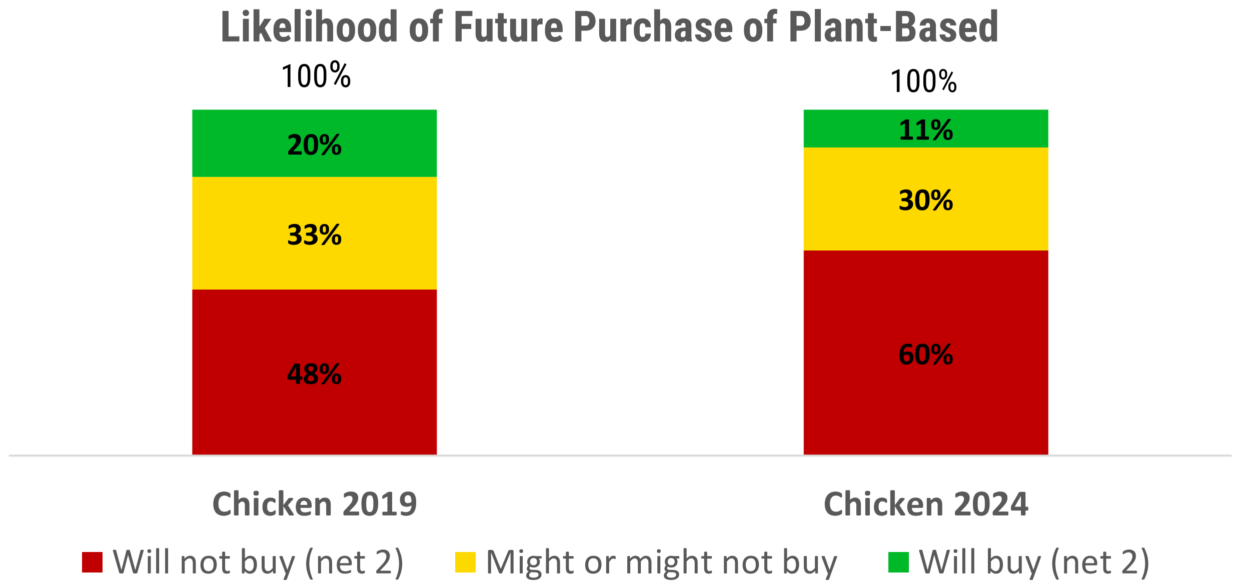
In 2019, just 10% of all fresh chicken buyers had purchased plant-based alternatives

- **42%** **Gen Z** | Under 27
- **34%** **Younger Millennial** | Ages 27-33
- **38%** **Older Millennial** | Ages 34-42
- **41%** **Gen X** | Ages 43-58
- **16%** **Younger Boomers** | Ages 59-67

National Chicken Council Conference Survey 2024
Q5: Have you purchased plant-based meat/plant-meat blend alternatives in the past 6 months?

Chicken buyers' intent to buy plant-based protein has declined from 20% to 11%

This is true among those who do not currently consume plant-based protein. Among those who have not purchased PB, intent to buy in the future has decreased for all proteins



S2. Which of the following types of meat/protein types have you purchased in the last 6 months?
Q6. You mentioned that you haven't bought plant-based meat/plant-meat alternatives in the past 6 months. How likely are you to purchase this type of protein in next 6 months?

Skepticism around taste, findability, and cost are top barriers to plant-based options

Key levers to increase or activate plant-based purchases

Top 3 Motivators

#1	If it **tasted better** or just as good as conventional fresh meat products	40%
#2	If it was **more widely available** in stores	38%
#3	If it was **priced lower** than conventional fresh meat products	37%

	NET
Price	60%
Health	58%
Taste & Texture	50%
Availability	46%
Variety	42%
Sustainability	41%

National Chicken Council Conference Survey 2024, Q7: Which of the following, if any, would increase your likelihood to buy/buy more plant-based meat/plant-meat blend alternatives?

Younger cohorts are the most discerning when considering plant-based options

Gen Z will need the most assurance to increase openness toward plant-based alternatives.

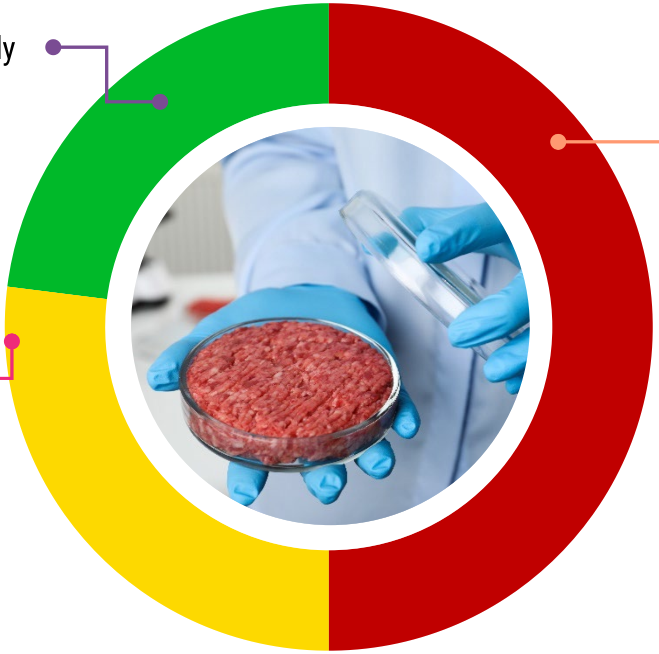
Key Levers to Activate Plant-based Purchases	Total Fresh Chicken Buyers	GEN Z: Under 27	Younger Millennial: Ages 27-33	Older Millennial: Ages 34-42	GEN X: Ages 43-58	Younger Boomers: Ages 59-67
Price (Net)	60%	129	114	105	97	86
Health (Net)	58%	132	122	102	101	75
Authentic Taste & Flavor (Net)	50%	132	111	84	100	101
Availability (Net)	46%	155	119	109	97	75
Variety (Net)	42%	124	126	100	101	75
Sustainability (Net)	41%	155	125	101	100	71

Green = Over-indexing vs. Total Raw Chicken Buyers/Red = Under-indexing vs. Total Raw Chicken Buyers

National Chicken Council Conference Survey 2024, Q7: Which of the following, if any, would increase your likelihood to buy/buy more plant-based meat/plant-meat blend alternatives?

Openness to lab-grown meat trails plant-based options, with 4 in 10 being highly resistant

Likelihood to purchase lab-grown / cell-cultured meat



Nothing would increase likelihood of buying…

LAB-GROWN MEAT

38%

PLANT-BASED MEAT

23%

National Chicken Council Conference Survey 2024,
Q8: Lab-grown meat, also known as cell-cultured meat, is meat that is grown in a laboratory from actual animal cells. Based on this description, how likely are you to purchase and eat meat that was made in a laboratory?
Q9: Which of the following, if any, would increase your likelihood of buying lab-grown/cell-cultured meat?

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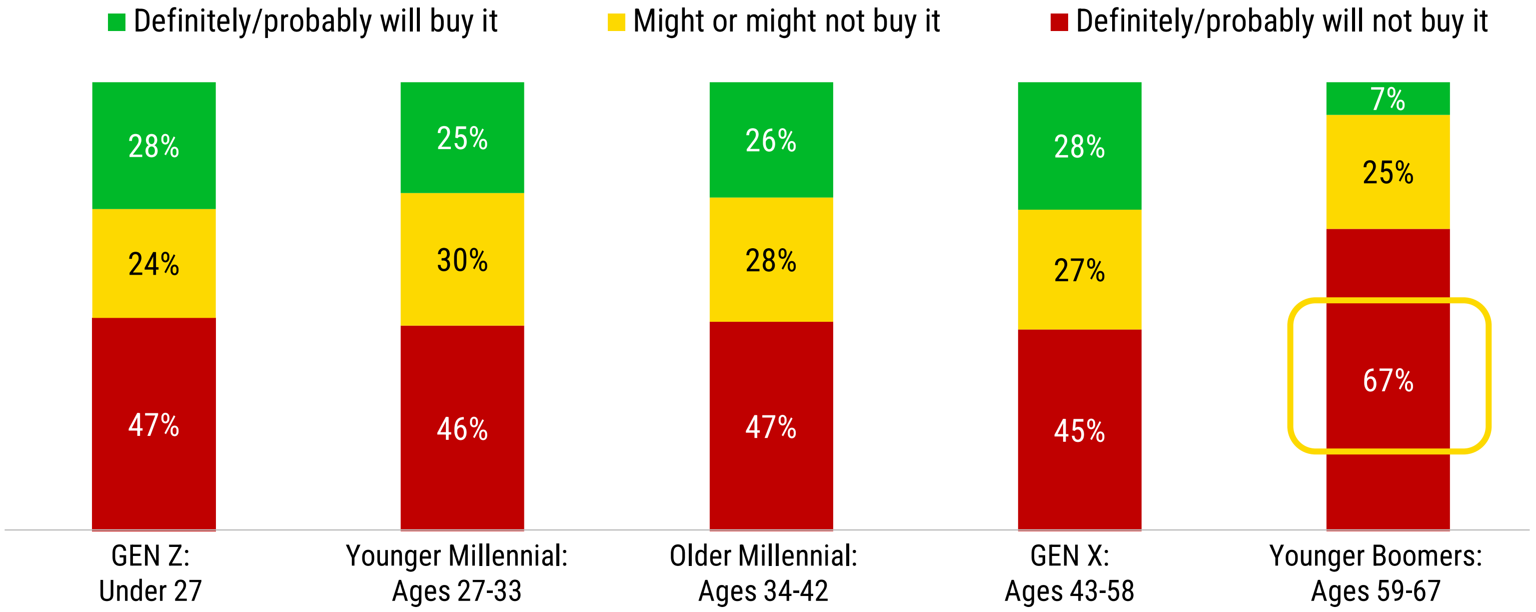
Younger Boomers are most resistant, though all cohorts show hesitance; education will be key

Likelihood to purchase lab-grown/cell-cultured meat



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National Chicken Council Conference Survey 2024, Q8: Lab-grown meat, also known as cell-cultured meat, is meat that is grown in a laboratory from actual animal cells. Based on this description, how likely are you to purchase and eat meat that was made in a laboratory?

Barriers to lab-grown meat resemble plant-based, though skepticism is higher

Key levers to activate lab-grown/cell-cultured meat purchases

Top 3 Motivators

#1	If it was **priced lower** than conventional fresh meat products	30%
#2	If it **tasted better** or just as good as conventional fresh meat products	29%
#3	If it was **more widely available** in stores	27%

	NET	Plant-based Meat	Potential impact of levers vs. Plant-based Meat
Health	47%	58%	-11%
Price	46%	60%	-14%
Sustainability	38%	41%	-3%
Taste & Texture	38%	50%	-12%
Availability	35%	46%	-11%
Variety	34%	42%	-8%

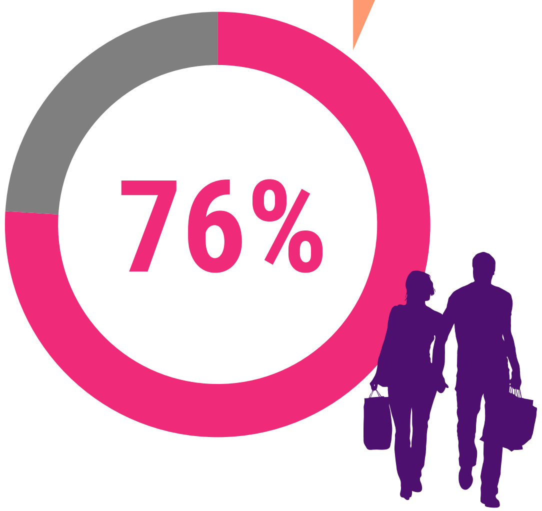
National Chicken Council Conference Survey 2024, Q9: Which of the following, if any, would increase your likelihood of buying lab-grown/cell-cultured meat?

Increased awareness of corporate responsibility has potential to impact purchases

Younger consumers are particularly favorable toward practices related to social causes and transparency.

IMPACT OF CORPORATE RESPONSIBILITY ON FOOD PURCHASES

Corporate responsibility matters to my purchase decisions for food*



Which practices matter most?

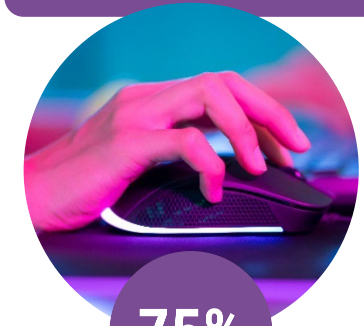
	Total	Gen Z	Younger Millennials
Support local communities	41%	48%	40%
Demonstrate commitment to animal welfare	39%	38%	31%
Use packaging that can be recycled after use	38%	39%	43%
Take measures for employee welfare (e.g., fair wages, safety, etc.)	38%	41%	43%
Use minimal or recycled packaging	34%	37%	37%
Demonstrate commitment to environmental sustainability	34%	39%	36%
Support social causes	23%	33%	23%
Report on their sustainability initiatives	22%	25%	28%

- *Net score includes those who mentioned at least one option shown; National Chicken Council Conference Survey 2024, Q10: Lastly, we'd like to ask you about companies that follow certain practices with regards to the environment or social causes. When shopping for food items, which of these company practices, if any, do you consider when making a purchase?*

Opportunity to leverage digital and packaging to build awareness of corporate practices

Top ways to learn about companies with corporate responsibility programs (all responses net)

ONLINE



75%

#1 online way to learn

Search engine results (e.g., Google): **40%**

PRODUCT PACKAGING OR DISPLAY

66%

#1 packaging/display way to learn

Product label on packaging: **45%**

OTHER MEDIA + WORD OF MOUTH

66%

#1 other media/word of mouth way to learn

Friends and family: **44%**

SOCIAL MEDIA

55%

#1 social media way to learn

Posts from friends, family, professional network, etc.: **29%**

National Chicken Council Conference Survey 2024Sources of Information (Among those whose purchases are impacted by corporate responsibility)
Q11: How do you typically learn about companies that practice this?

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Carryout and delivery: beyond convenience, a glimpse into the future

ROBOTS, DRONES AND SELF-DRIVING CARS:
Faster service and potentially lower costs.

AI PROVIDES DATA INSIGHTS:
Using data on customer behavior and spending, offer dynamic pricing, incentivizing orders of specific menu items can be a win-win for customers and operators.

SUSTAINABLE PACKAGING:
Concerns about environmental impact will drive consumer demand for sustainable and functional packaging. Offer recyclable, compostable and reusable packaging options.

UNDERSTANDING CUSTOMERS – AGE MATTERS:

Tech-savvy Millennials and Gen Z: Convenience is key. Heavy users of online and app-based ordering and delivery services.

Gen X and Baby Boomers: More likely to use carryout options. Familiarity, affordability, convenience of picking up orders while already out.

Seniors: Promising market with potential. Pre-made meals and delivery offer solutions for those with limited mobility or difficulty cooking.

https://www.freedoniagroup.com/blog/the-future-of-food-takeout-and-delivery-convenience,-technology,-and-sustainability-trends, April, 2024

Restaurants exploring new revenue streams

Multihyphenate retail differentiates their business, deepens customer relationships

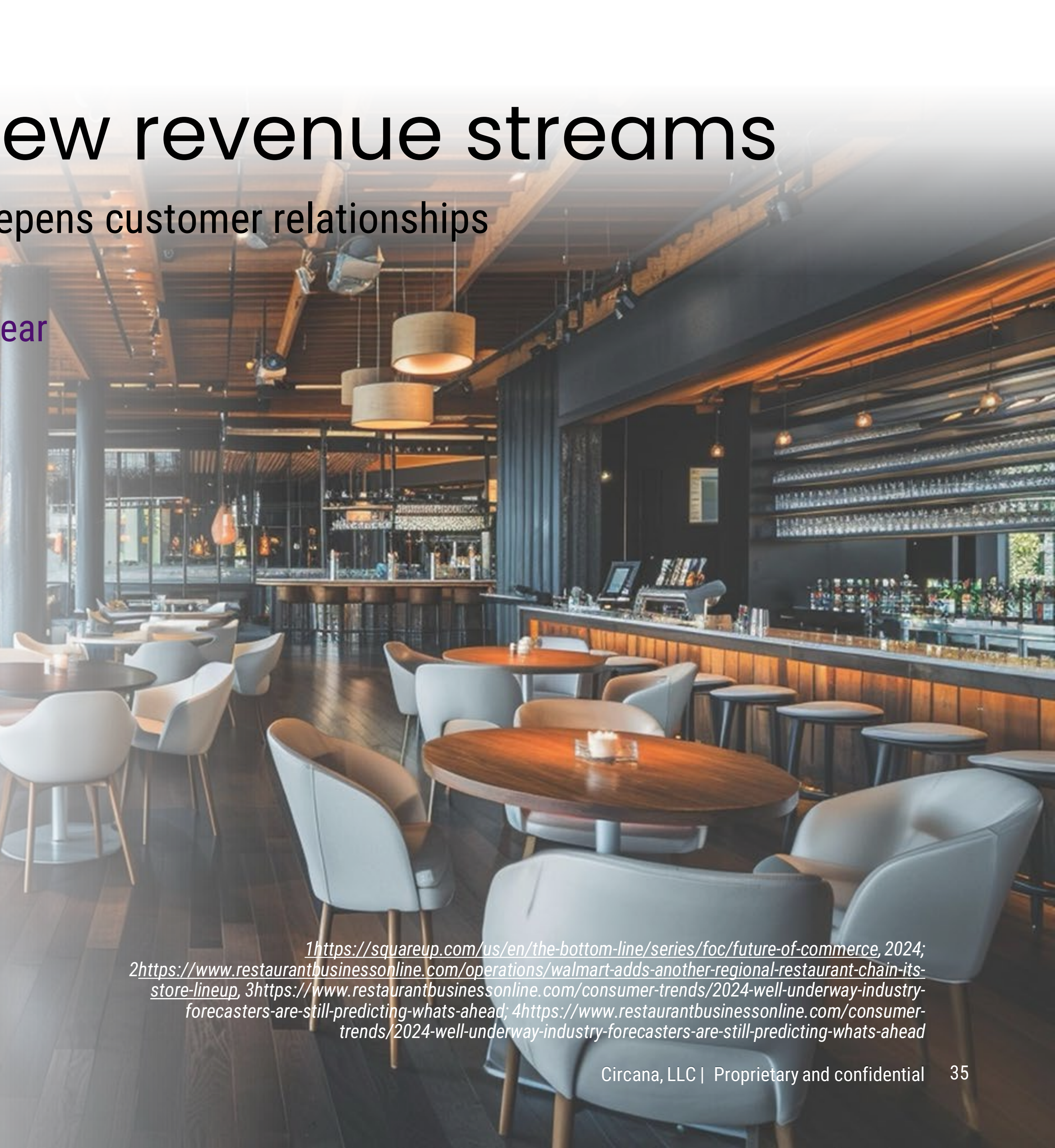
77% of restaurants plan to expand in the coming year by adding non-core offerings like meal kits, subscriptions, events, or merchandise.

Consumers who regularly dine out are looking to create those same restaurant flavors at home.

71% of consumers were in favor of a professional chef curating a box of groceries

Restaurant / Retail Partnerships:

- Whole Foods in NYC with café concept Juice & Java inside
- Walmart opening QSR in stores, leveraging draw of regional chains rather than national restaurant names
  - Houston-based Uncle Sharkii Poke Bar
  - Food hall concept Wonder in Quakerstown, PA
  - Mr Gatti's Pizza in North Texas and Southern OK



1https://squareup.com/us/en/the-bottom-line/series/foc/future-of-commerce, 2024; 2https://www.restaurantbusinessonline.com/operations/walmart-adds-another-regional-restaurant-chain-its-store-lineup, 3https://www.restaurantbusinessonline.com/consumer-trends/2024-well-underway-industry-forecasters-are-still-predicting-whats-ahead; 4https://www.restaurantbusinessonline.com/consumer-trends/2024-well-underway-industry-forecasters-are-still-predicting-whats-ahead

Winning the consumer in 2035

Tell Your Sustainability Story | Make your products the right choice, offer transparency, back up claims with meaningful, measurable actions

Make Meal Prep Easy for One or Many | Packaging is your billboard. Offer single portions. Provide recipes, menu plans with QR codes, social media influencers.

Leverage Established Benefits: Taste, Healthy Protein, Versatility | Comfort food, traditional favorites appeal to nostalgia, indulgence and self-care.

Food Brings Us Together | Metaphorically with global flavors, physically with social eating, sharable experiences.

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What’s Next

The Next Big Thing

AI-Enabled Shopping / Cooking

- **Shopping Help:** Order ingredients via pictures from the fridge or images from a phone screen

- **Cooking Help:** Step by step, interactive, cooking instructions – as if mom / dad is in the kitchen

- **Discovery Help:** Individually tailored new recipe / restaurant recommendations via analyzing past interactions

In-Stream Product Interaction

- Video streaming becomes interactable and “clickable”

- Consumers can order what an actor is wearing; they can order the recipe or ingredients of a dish they see on their screens

- This emerging technology is the analog of in-app purchases of social media apps and can proliferate similarly

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The Next Big Thing (cont'd)

AR Enhanced Shopping (In-Store)

- **Convenience:** Real time product information while browsing
- **Personalization:** Hyper-customized promotions projected directly on the item/shelf
- **Discovery / Experimentation:** Hyper-customized product recommendations while browsing (cadence is key)

VR Shopping (At Home)

- **Convenience:** Consumers can shop replicas of their local stores or a "mega-store" that carries more items at home
- **Convenience:** 3D shopping without leaving home, removes barriers of 2D (specifically grocery) shopping on PC or phone
- **Discovery / Experimentation:** Built-in algorithms make product recommendations that resonate

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Thank you

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Appendix

Winning the consumer in 2035 – and now!

Offer Transparency for Sustainable Practices

- Satisfy “Say-Do” for Gen Z
- Millennials more likely to hold brands accountable

Make it Easy – Choosing, Buying, Prep

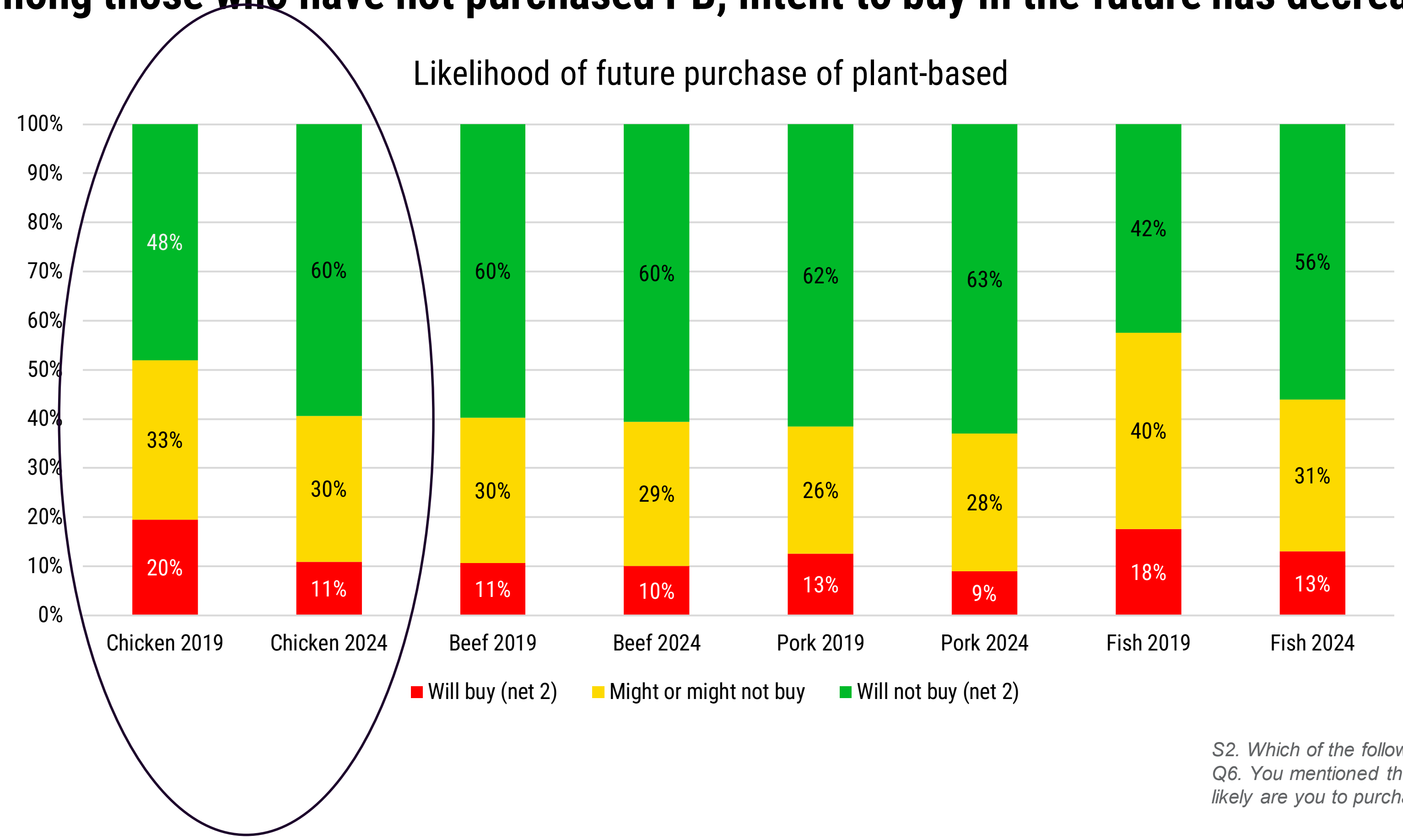
- ALL are seeking convenience
- Product label is your billboard!
- Friends and family are trusted sources, using a variety of sources

Reinforce the Established Benefits of Chicken

- Value
- high quality protein
- versatility for preparation and flavors

Compared to 2019: Among those who do not currently consume plant-based protein, chicken buyers intent to buy PB has declined from 20% to 11%.

Among those who have not purchased PB, intent to buy in the future has decreased for all proteins



S2. Which of the following types of meat/protein types have you purchased in the last 6 months?
Q6. You mentioned that you haven't bought plant-based meat/plant-meat alternatives in the past 6 months. How likely are you to purchase this type of protein in next 6 months?

In addition to price, reinforcing health benefits and authentic taste + texture are critical.

PRICE (NET) 60%	HEALTH (NET) 58%	TASTE & TEXTURE (NET) 50%	AVAILABILITY (NET) 46%	VARIETY (NET) 42%	SUSTAINABILITY (NET) 41%
If it was priced lower than conventional fresh meat products 37% #3	If it had higher protein content than conventional fresh meat products 28%	If it tasted better or just as good as conventional fresh meat products 40% #1	If it was more widely available in stores 38% #2	If it was available in a wider variety of meat forms (e.g., ground meat, burger patties, sausage, etc.) 22%	If it was more sustainable to produce than conventional fresh meat products 29%
If it was priced similarly to conventional fresh meat products 30%	If it had a clean label (no artificial ingredients) 27%	If it had better or similar texture as conventional fresh meat products 28%	If it was more widely available online 16%	If it was available in a wider variety of flavors or seasonings (e.g., BBQ, teriyaki, Cajun, etc.) 22%	If buying it made a big impact on animal welfare 20%
	If it had clear health claims on the package 25%			If it was available in a wider variety of protein types (e.g., alternatives to beef, pork, chicken, etc.) 22%	
	If it had lower fat content than conventional fresh meat products 20%				

National Chicken Council Conference Survey 2024

Q7: Which of the following, if any, would increase your likelihood to buy/buy more plant-based meat/plant-meat blend alternatives?

Meal kit innovation shows potential among younger chicken consumers.

Meal kits resonate well with a fourth of chicken consumers, especially GenZ and Millennials.

"Priority right now"

	Total Raw Chicken Buyers	GEN Z: Under 27	Younger Millennial: Ages 27-33	Older Millennial: Ages 34-42	GEN X: Ages 43-58	Younger Boomers: Ages 59-67
Fast prep time (30 minutes or less)	60%	84	110	105	97	95
Packaging that offers no mess or clean-up	47%	84	118	104	105	77
Pre-cut fresh meat, vegetables, etc. (no slicing needed)	45%	109	118	116	98	75
Individual-sized portions	44%	106	96	125	97	85
Meal prep (making pre-portioned meals for the week)	41%	92	110	129	102	64
Meal kits with everything you need to make the meal	28%	134	109	139	109	38
Meal kits with ingredients and flavors from around the world	25%	118	142	104	112	40
Packaging with a QR code for more info on preparation, recipes, nutrition, etc.	23%	103	130	123	102	53

Green = Over-indexing vs. Total Raw Chicken Buyers
Red = Under-indexing vs. Total Raw Chicken Buyers

National Chicken Council Conference Survey 2024

Q2: When it comes to food preparation, which of these are a priority for you and your household?

Pre-portioned meals are higher priority among Older Millennials.

Overall, 4 out of 10 prioritize pre-portioned meals.

"Priority right now"

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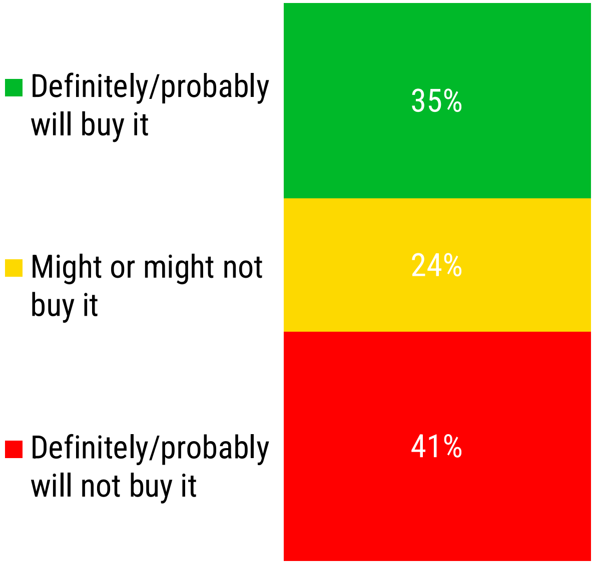
Green = Over-indexing vs. Total Raw Chicken Buyers
Red = Under-indexing vs. Total Raw Chicken Buyers

Q2: When it comes to food preparation, which of these are a priority for you and your household?

Chicken buyers less likely to buy plant based

Likelihood to purchase plant-based meat in next 6 mos

Slight decline in intent to buy: In 2019, 44% said they definitely/probably will buy



Key levers to increase or activate plant-based purchases

#1	If it **tasted better** or just as good as conventional fresh meat products	40%
#2	If it was **more widely available** in stores	38%
#3	If it was **priced lower** than conventional fresh meat products	37%

National Chicken Council Conference Survey 2024

Q6: How likely are you to purchase plant-based meat/plant-meat blend alternatives in the next 6 months?
Q7: Which of the following, if any, would increase your likelihood to buy/buy more plant-based meat/plant-meat blend alternatives?

Opportunity to leverage digital and packaging to build awareness of corporate practices.

Sources of Information
(Among those whose purchases are impacted by corporate responsibility)

ONLINE (NET)	75%
Search engine results (e.g., Google search)	40%
Videos on YouTube or other website	28%
Brand/company website	27%
Websites related to environmental topics, causes, etc.	25%
Online forums	18%
Online newsletter or weekly email	11%
Blogs	11%
Podcasts	10%

PRODUCT PACKAGING OR DISPLAY (NET)	66%
Product label on packaging	45%
Information at store displays	33%
Scan QR code on product packaging for more information	17%

OTHER MEDIA + WORD OF MOUTH (NET)	66%
Friends and family	44%
Mainstream media reports (e.g., TV news, newspaper article, etc.)	41%

SOCIAL MEDIA (NET)	55%
Social media posts from friends, family, professional network, etc.	29%
Brand/company's social media page/channel	22%
Social media posts from influencers, celebrities, etc.	21%
Ads on my social media feed	18%

Q11: How do you typically learn about companies that practice this?