Facts vs. Fear:

How Consumers Are Navigating the Era of Avian Influenza

Insights and Implications for the Poultry Industry

July 2025

marriner marketing
let clarity define you.

When it comes to avian influenza (HPAI), consumers are confused. Despite industry-wide safeguards and science-based assurances, misinformation is making its way into purchase decisions. This is especially true among younger, digitally connected shoppers who are also among the most engaged and influential.

To see where consumer confidence stands today and how marketing and communications can clear the path forward, Marriner Marketing surveyed 1,000 grocery shoppers who regularly purchase chicken.

This report highlights what consumers know, what they don't and what they're ultimately seeking. More importantly, it outlines how the industry can respond—clearly, confidently and credibly—to protect trust and maintain demand.

Unsure of the Landscape

74% of consumers say they're "familiar" with HPAI. But that familiarity is surface-level, with only 31% saying they're "very familiar."

So who says they're "very familiar"?

Millennials are most likely to say they're "very familiar" at...

41%

Baby boomers are least likely to say they're "very familiar" at...

19%

Worth Noting

Among all income groups, high-income households are more likely to say they're "very familiar" at...

47%

Despite general awareness of the virus, consumers are confused about which foods can be affected.

71% say chicken	**70%** say eggs	**38%** say turkey
26% say dairy	**16%** say beef	**13%** say pork

⛔ 19% of Gen Z and 15% of millennials wrongly assume fruits and vegetables can be affected.

The worry is real.

50%
of consumers believe it's easy for them to catch HPAI

41%
are at least somewhat concerned that they will catch it

Key takeaway:

Familiarity ≠ understanding.
Concern about personal transmission highlights a need for consistent, accessible education.

Misinformed and Misguided

FACT

You can’t catch HPAI from eating properly cooked chicken.

- But **41%** of consumers think you can
  Including 19% of millennials who are positive and 39% who are unsure but think it’s possible
- Only **22%** are confident you can’t

FACT

You can’t catch HPAI from eating properly cooked eggs.

- But **50%** of consumers think you can

FACT

You can’t catch HPAI from consuming pasteurized milk.

- But **30%** of consumers think you can

Key takeaway:

Many consumers are misinformed about HPAI and safe cooking. We need to clearly and repeatedly explain that proper cooking eliminates the risk.

Pivoting in the Aisle

With 67% of consumers stating they've heard about HPAI in the news over the past year, it's no surprise that 37% say they've changed their chicken purchasing behavior.

What has changed?

38% purchased chicken less often in the past year

Why?

33% say price increases

32% say health concerns related to HPAI

Have they switched to other proteins?

Yes, **30%** have

Of this group,

50% are buying more ground beef

46% are buying more seafood

What are high-income households saying?

43% now buy only certain brands of chicken

36% have switched to other proteins

Taking a closer look.

Interestingly, these purchasing behavior shifts vary widely by generation.

Gen Z

55% have made some changes, with **26%** reporting significant changes

42% purchased chicken less often

37% bought only from certain stores

35% bought only certain brands of chicken

Millennials

54% have made some changes, with **31%** reporting significant changes

35% purchased chicken less often

35% started buying based on certain production claims (organic, pasture-raised, etc.)

35% bought only certain brands of chicken

Gen X

30% have made some changes

Baby Boomers

15% have made some changes

Key takeaway:

Behavior change is happening most among younger consumers and high-income households. This makes them a priority audience for clear, proactive reassurance.

A Little Direction Goes a Long Way

The good news? There is a big opportunity to clear the air because consumers are actively looking for answers.

46%

seek out food safety info frequently or always

74%

seek out food safety info at least sometimes

Younger generations are seeking out this information at even higher rates.

Gen Z	Millennials
60% frequently or always **83%** at least sometimes	**59%** frequently or always **85%** at least sometimes

Generally, consumers say they want evidence-based content when learning about food safety issues.

53% want scientific research and data

38% want expert interviews (43% for millennials)

36% want industry reports (40% for millennials and Gen Z)

The Baby Boomer Exception
19% of baby boomers say they don't wish to receive any content related to food safety issues

19%

Preferred content formats vary by generation.

Gen Z

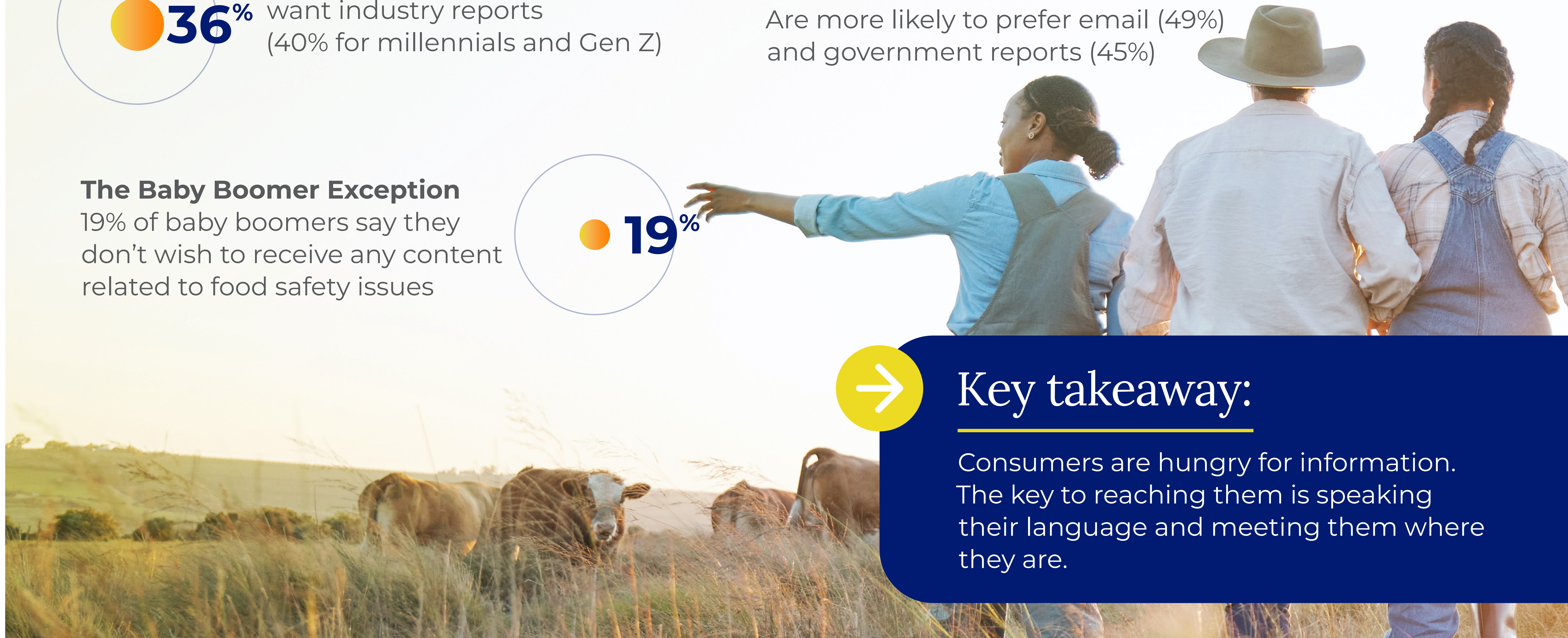
Leans into social media posts (48%), articles (46%), videos (40%) and infographics (28%)

Millennials

Turn to social media posts (41%) and videos (41%)

Baby Boomers

Are more likely to prefer email (49%) and government reports (45%)



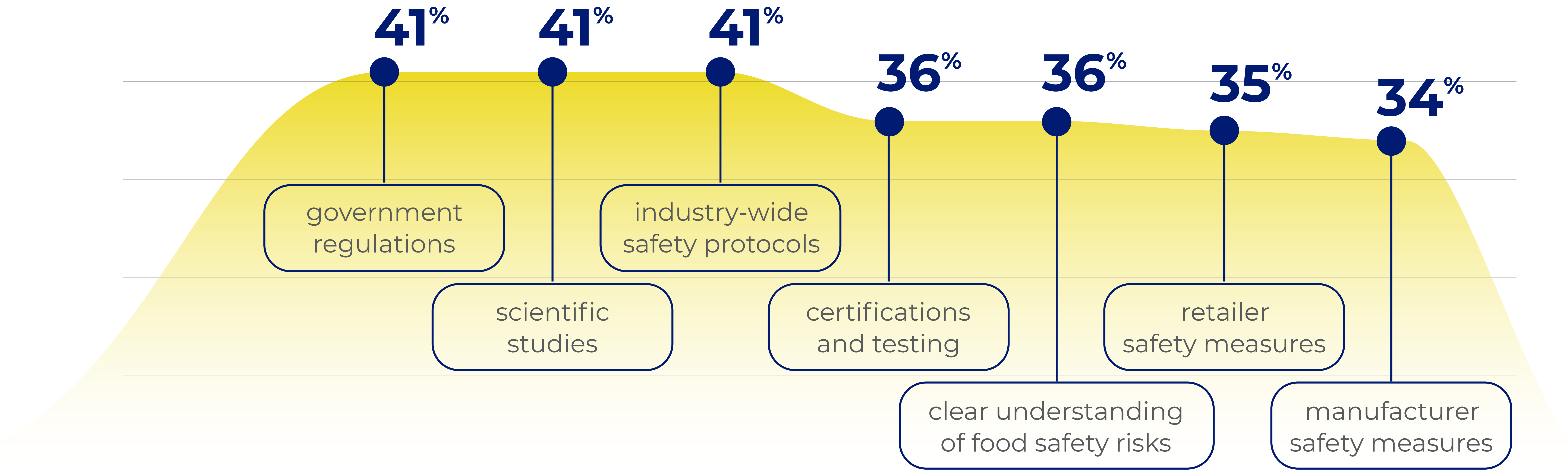
Key takeaway:

Consumers are hungry for information. The key to reaching them is speaking their language and meeting them where they are.

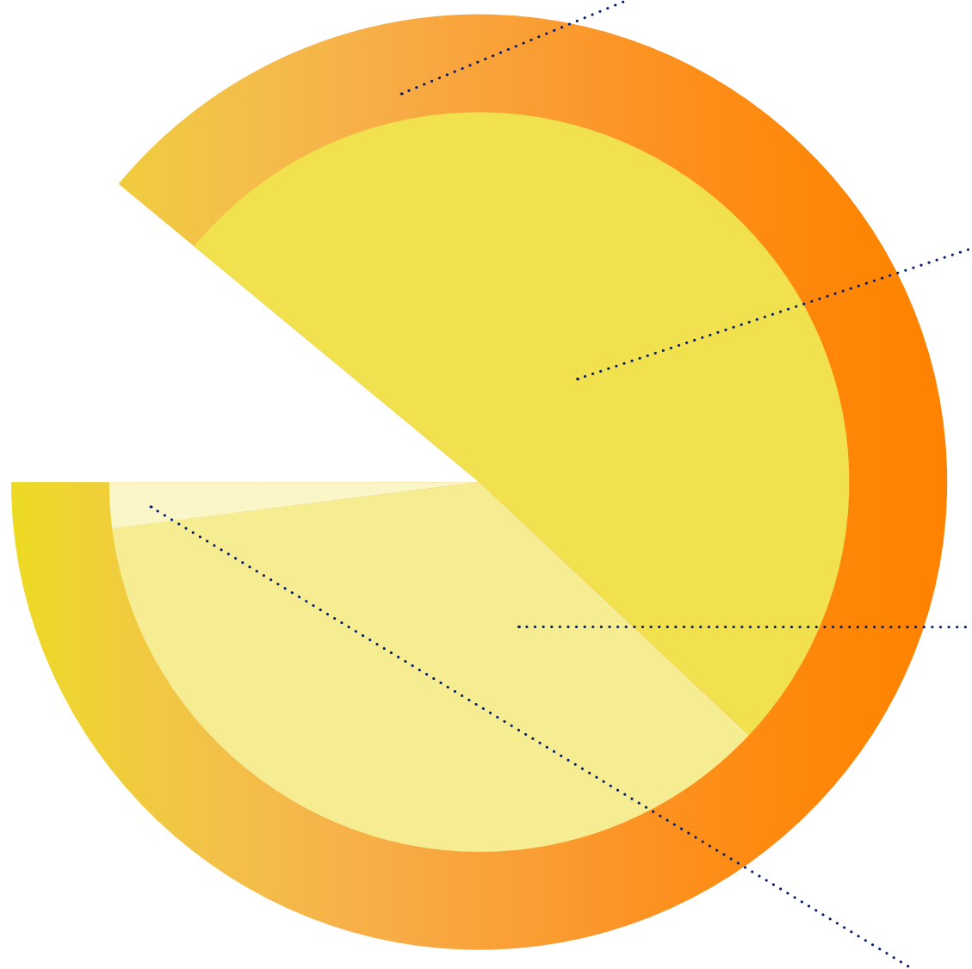
Seeking the Truth

When it comes to food safety, over-promissory marketing and unclear messaging are the last things consumers want.

So what do consumers say would make them more confident about the safety of chicken during an outbreak?



There's no doubt consumers also want more communication and specifics from brands.



89% want more transparency from poultry and egg brands

51% want "a lot of detail" from brands and the industry

36% want "some detail"

2% say they want none

Key takeaway:

Transparency is vital and getting consumers' buy-in will take a coordinated, industry-wide effort.

The Source Matters

Though consumers turn to a wide variety of news sources, there are clear winners and losers when considering trust.

✓ Most trusted:
credible institutions

55% somewhat or completely trust government health agencies (USDA, CDC, etc.)

48% somewhat or completely trust the poultry industry

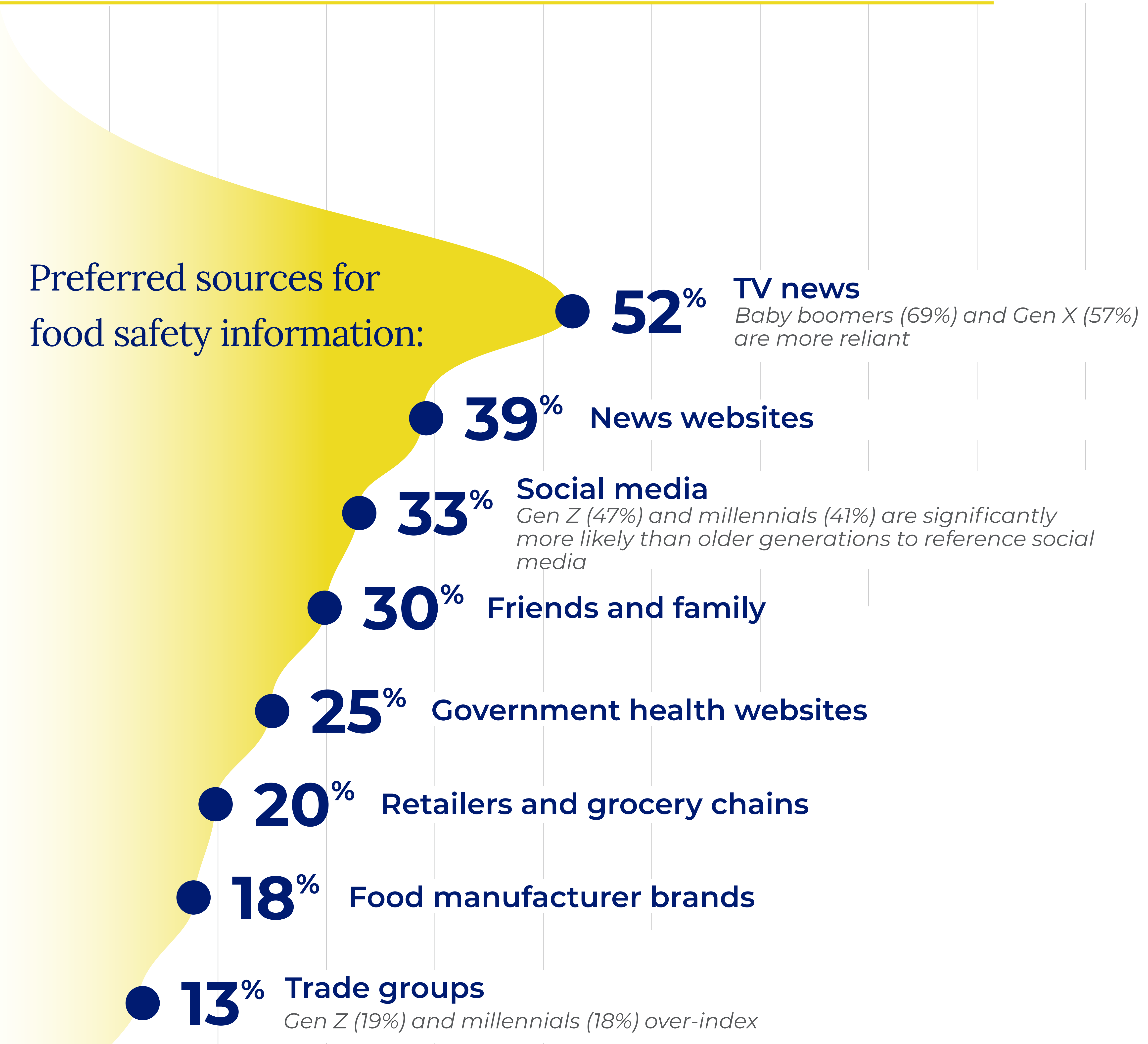
⊖ Least trusted:
social media

44% distrust it as a source of accurate HPAI information

Baby boomers (**67%**) are the most distrustful, but are also the least likely to use social media

Millennials (**41%**) and Gen Z (**34%**) trust it more, but still less than government health agencies, the poultry industry, news media and grocery stores

Preferred sources for food safety information:



52% **TV news**
Baby boomers (69%) and Gen X (57%) are more reliant

39% **News websites**

33% **Social media**
Gen Z (47%) and millennials (41%) are significantly more likely than older generations to reference social media

30% **Friends and family**

25% **Government health websites**

20% **Retailers and grocery chains**

18% **Food manufacturer brands**

13% **Trade groups**
Gen Z (19%) and millennials (18%) over-index

Key takeaway:

Although distrust is high, social media remains a common source of information among younger generations. Rather than hope they look somewhere else, we need to deliver more credible content where they're already going.

Where We Go from Here

Trust in poultry is still strong, but it's fragile. An effective communication strategy is the key to helping consumers press forward with confidence.

STEP 1 Collaborate Across the Industry

This is a time for alignment.

- Trade organizations (e.g., NCC) can co-create educational materials with manufacturers
- Retailers can support with in-store communication efforts
- Media partners can be enlisted to amplify vetted information

STEP 2 Use Trusted Voices Across the Right Channels

In uncertain times, credibility carries weight.

- Leverage USDA and third-party scientists as validators
- Ensure brands and trade organizations provide consistent messaging via:
  - i. Websites
  - ii. Digital and social platforms
  - iii. Grocery signage
- Embrace short-form content and FAQ formats to counteract misinformation in real time

STEP 3 Reinforce the Basics and Speak Humanly

Use these examples as inspiration:

Our chickens are safe to eat—and here's why.
Infected birds are never allowed into the food supply. Period.

Cooking kills bird flu.
Avian Influenza cannot survive cooking temperatures. A meat thermometer is your best friend.

We're not just watching for outbreaks—we're preventing them.
Behind every chicken in the case is a network of science, surveillance, and strict safety protocols.

Know more. Worry less.
Get facts from trusted sources like the USDA, not rumors in your feed.

In Summary

If there’s one big takeaway from these findings, it’s that this challenge also presents an opportunity. The key to forward progress will come from the perspectives of industry players and the actions that follow. We need to acknowledge that consumer trust is earned by truth and transparency. We need to embrace marketing as a tool for honest communication. In a time when fear spreads faster than facts, using the right message, tone and channel isn’t just helpful—it’s essential.

Looking for more?

Let’s continue the conversation and create a strategic, tailored plan for your marketing approach.

Schedule Meeting with David

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With special thanks to Anne-Marie Roerink of 210 Analytics for her industry expertise and perspective.

210analytics

Marriner Marketing. “Facts vs. Fear: How Consumers Are Navigating the Era of Avian Influenza.” 2025. 1,000 chicken shoppers surveyed.

Appendix: Respondent Profile

Shopper group	Share of respondents
Gender	
Men	49%
Women	50%
Non-binary	1%
Age	
18-28	20%
29-44	27%
45-60	26%
61-79	25%
80+	2%
Area	
Urban	28%
Suburban	49%
Small town	9%
Rural	14%

Shopper group	Share of respondents
Census region	
Northeast	19%
Midwest	23%
South	36%
West	22%
Cultural heritage	
Caucasian	63%
African American	12%
Asian American	7%
Hispanic/Latino	17%
Other/decline to answer	1%
Household composition	
No kids living at home	63%
Kids ages 0 through 18 living at home	37%

Shopper group	Share of respondents
Education	
Less than high school diploma	2%
High school degree or equivalent	27%
Some college, no degree	18%
Associate degree	12%
Bachelor's degree	23%
Advanced degree (master's, professional or doctorate)	18%
Household income	
Less than $45,000	32%
$45,001 – $100,000	35%
>$100,000	33%