

"CLAIMING BACK OUR CHICKENS"

**CHICKEN CRISIS SHOULD NOT DAMPEN
THE SPIRITS OF OUR SOUTH AFRICAN
HERITAGE BRANDS.**

Research Report
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Declaration

I Ashleigh Paige Stone declare that this dissertation is of my own original work. Secondary research material of any kind that has been used throughout this dissertation is peer reviewed and has either been a print source or from the Internet. I am well aware that plagiarism is the use of another person's words, ideas and work without appropriate and specific acknowledgement. All sources are appropriate and referenced using the required Harvard way of referencing and can be found at the end of this document.

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Abstract

This small-scale qualitative study looked at the current issue of chicken imports and how they have, with great ease, been able to flood the South African markets and take over from brands that have built trusted relationships and heritage over the many years. This research study particularly focuses on the brand Farmer Brown, which is a chicken production company in South Africa and is considered to be premium and rich with heritage as they had a trusted story and relationship with their target market. The research for this study focused on identifying what strategy Farmer Brown could potentially implement in order to take back their top spot in the South African market. This research study employed a qualitative approach and assessed the views and opinions of two different population groups to find out what exactly Farmer Brown was doing right when they had their top spot in the market to now where hardly anybody knows or sees them. From the research conducted on these two groups, specific themes such as; brand image and identity, and brand equity were identified and explored in relation to the consumers' perceptions of Farmer Brown. Consumer behaviour and marketing strategies were also considered. The findings were captured from 15 generation X consumers who were familiar with the Farmer Brown brand, 25 general Millennial parents, 5 random shoppers, and 1 professional that is in this industry. Insights from the findings lead to meaningful recommendations to help Farmer Brown take back their place in the South African market. The findings revealed that Farmer Brown needs to target a new audience which the researcher has suggested to be the Millennial generation. Farmer Brown will need to actively and effectively communicate with this audience and position themselves differently in order to claim back their spot. Findings have also revealed that the Millennial generation want slightly different chicken product variations to what Farmer Brown is currently offering and therefore has been recommended that Farmer Brown take note of this generation's wants and needs.

CONTENTS

Chapter One:	8
Overview of Research	8
1. Introduction	8
1.1. Problem Statement	8
1.2. Purpose Statement	8
1.3. Justification	9
1.4. Research Question	9
1.4.1. Sub-Questions	10
1.5. Research Objectives	10
Chapter Two:	10
Literature Review & Theoretical Framework	10
2. Introduction	10
2.1. Situational Analysis	11
2.1.1. Macro Analysis	11
2.1.2. Micro Analysis	12
2.1.3. SWOT Analysis	14
2.2. Brand Equity	15
2.2.1. Brand Awareness	16
2.2.2. Perceived Quality	17
2.2.3. Brand Association	17
2.2.4. Brand Loyalty & Customer Loyalty	18
2.3. Impact of Brand Image	19
2.3.1. Brand Perception	19
2.4. Brand Identity	20
2.5. Customer Decision Making	22
2.6. Resistance to Brand Switching	23
2.7. Brand Revitalisation	24
2.8. Internal Brand Building	26
2.9. Summary of Literature	27
Chapter Three:	28
Research Methodology & Design	28
3. Introduction	28
3.1. Research Design	28
3.2. Quantitative Research	28

3.3. Qualitative Research	29
3.4. Mixed Methodology Research	29
3.5. Adapted Research Methodology	29
3.6. Research Plan	30
3.7. Target Population	31
3.7.1. Concentrated Generation X	31
3.7.2. General Millennial Parents	32
3.8. Sampling & Sample Size	32
3.8.1. Sample Method	32
3.8.2. Sample Size	33
3.9. Data Collection Method	33
3.9.1. Questionnaires	34
3.9.2. Focus Groups	34
3.9.3. Structured & Unstructured Interviews	35
3.10. Data Analysis Method	36
3.11. Validity, Reliability & Trustworthiness	37
3.11.1. Validity	37
3.11.2. Reliability & Trustworthiness	37
3.12. Questionnaire Construction	38
3.13. Pilot Study	38
3.14. Anticipated Contribution	39
3.15. Ethical Considerations & Limitations	39
3.16. Summary	40
Chapter Four:	41
Presentation of Discussion and Findings	41
4. Introduction	41
4.1. Presentation and Discussion of Findings	41
4.1.1. Demographics of Respondents	41
4.1.1.1. Age Demographics	42
4.1.1.2. Discussion & Results	42
4.1.1.2.1. Concentrated Generation X Findings	43
4.1.1.2.2. General Millennial Parents Findings	43
4.1.1.2.3. Random Shopper Findings	46
4.1.1.2.4. Industry Member Findings	47
4.2. Insights	48
Chapter Five:	49

Conclusions and Recommendations	49
5. Introduction	49
5.1. Objective One	49
5.1.1. Findings from Literature	49
5.1.2. Findings from Research	50
5.1.3. Conclusion	51
5.1.4. Recommendations	51
5.2. Objective Two	52
5.2.1. Findings from Literature	52
5.2.2. Findings from Research	53
5.2.3. Conclusion	53
5.2.4. Recommendations	53
5.3. Objective Three	54
5.3.1. Findings from Literature	54
5.3.2. Findings from Research	55
5.3.3. Conclusion	55
5.3.4. Recommendations	55
5.4. Suggestions for Further Research	57
5.5. Closing Comment	57
Bibliography	59
Appendices	69
Appendix A	69
Annexure A	72
Annexure B	75
Annexure C	76
Annexure D	77

TABLES & FIGURES

Figure 2.1: Demographics of South Africa	11
Figure 2.2: Economic Factors of South Africa	12
Figure 2.3: Micro Analysis Factors	12
Figure 2.4: SWOT Analysis	14
Figure 2.5: David Aaker's Brand Equity Model	16
Figure 2.6: Keller's Equity Model	16
Figure 2.7: Aaker's Brand Identity Model	20
Figure 2.8: Extended Brand Identity	21
Figure 2.9: Value Proposition	21
Figure 2.10: Customer Decision Making Model	23
Figure 2.11: Brown's survey results on consumers' concerns	69
Figure 2.11.1: Brown's survey results on characteristics	69
Figure 2.12: Resistance to Brand Switching	70
Figure 2.13: Reasons for Brand Revitalisation	24
Figure 2.14: How Brand Revitalisation Can Be Done	25
Figure 2.15: Brand Revitalisation Strategies	25
Figure 2.16: Enterprise IG Buy-in Matrix	27
Figure 3.1: Constructivist Approach to Research Paradigm	70
Figure 3.2: Anti-positivism Approach to Research Design	71
Figure 4.1: Age Groups from Data Collected	42
Figure 4.2: Concentrated Generation X Farmer Brown Associations	43
Figure 4.3: What Attracts Millennials to Brands	44
Figure 4.4: Where Millennials Prefer to Grocery Shop	44
Figure 4.5: What Brands Need to do to Gain Millennials Trust	45
Figure 4.6: How Often Millennials Purchase Poultry	46
Figure 4.7: What Poultry Products Millennials Purchase	46
Figure 4.8: Shoppers Characteristics and Their Product Wants	47
Figure 4.9: Social Media that Millennials use Actively	56

Chapter One:

Overview of Research

1. Introduction

Today, South Africa faces a huge problem with regards to the 'cheap' imported chicken that is being pumped into our markets, leaving little room for our local brands to appeal to the South African consumer. One can question as to why these foreign chicken products are appealing to the consumer, some say that it is because of their convenient prices, but whatever the factor is, South African chicken producers need to understand it and need to develop strategies to rebuild their brands to regain strength in the marketplace, fighting back against the imports.

1.1. Problem Statement

This study aims to understand the problem of why and how the chicken crisis has affected South Africa, and why the term 'imports' has become feared within the local chicken production industry.

The study will focus on Farmer Brown, which is considered a heritage brand in South Africa, to understand how this 'heritage' brand went from being at a superior position in the market to one that fears tomorrow.

One needs to consider why South Africa has chosen to import chickens into their country and how these imports are 'taking over' our local chicken production industry in South Africa. The consequences of these imports need to be considered as well as what toll they have on our country.

1.2. Purpose Statement

According to Yellowwood (2014), the majority of South African consumers (75% - 94%) claim to prefer local brands", however, this contradicts how consumers are responding to the foreign chicken products. One needs to question why South African consumers are choosing these imports over locally produced chicken.

The purpose of this study is to understand how chicken imports are detrimental to South Africa's economy as well as understand how they affect local brands competing for the same spot in the market. Gaining insight into how the chicken imports are winning over South Africa's consumers will help one understand how local brands can 'fight back' and regain strength in the market.

1.3. Justification

As mentioned previously, this study will focus on a South African brand, Farmer Brown. Farmer Brown is considered to be a 'heritage brand' as they have existed physically and in the minds of consumers for a long time and have ultimately 'grown' with the South African market. Farmer Brown built a story that is relatable to consumers; "Our chickens taste so good because they eat so good". They have been the only poultry production brand that has been able to develop a personality for their brand. This study considers how this 'heritage brand' has been removed from its superior spot in the market as well as how it has been forgotten in the minds of consumers.

South Africa is rapidly importing chickens, one can question how these imports are taking over our industry here in South Africa. Farmer Brown has operated at a loss for the past five years according to Ray Mahlaka (2017). Imports are appealing to the South African market and the local chicken producers simply cannot keep up. Local brands are losing large amounts of money because consumers are not choosing to purchase local products anymore. These local brands may need to consider closing down their factories if they cannot change the consumer's mindset about their brand and change their buying behaviour.

1.4. Research Question

South Africa has their own chicken producers, which are considered to be branded 'rich with heritage', and they have been able to build trusted relationships with their consumers. How have these 'cheaply produced' imported chicken products been able to flood our markets with such ease?

1.4.1.Sub-Questions

- What is one's perception of Farmer Brown?
- What can Farmer Brown do as a brand to regain their strength in the marketplace?

1.5. Research Objectives

- To understand Millennial consumers mindsets in context, as this is the generation Farmer Brown should be currently targeting.
- Understand why Farmer Brown has become a 'forgotten' brand and build strategies that could potentially help them regain their strength in the market.
- Change the consumer's mindset about local vs. imports and eliminate imports being the 'go-to option' when purchasing chicken products.

Chapter Two:

Literature Review & Theoretical Framework

2. Introduction

The purpose of a literature review is to establish a theoretical framework for a particular study. It helps the researcher define key terms and identify models and studies that support the specified topic. According to Dr. Sally (2013), it enables readers to gain an overview of ideas and theories currently available on the topic.

This literature review will look at how chicken imports have 'won over' the South African market and how heritage brands of South Africa, such as Farmer Brown, can regain their strength within the market.

There are a variety of different models and literature that have been identified that link to the research problem of this study. Each source will help guide and identify what is known about the research problem, as well as identify what is not known. The researcher can then perform additional research to gain insight into what is unknown.

2.1. Situational Analysis

Situational Analysis is used to understand a brand's current situation. Lake (2016) suggests that brands need to perform a situational analysis before developing a marketing strategy because it is such an essential aspect of any marketing / business plan.

2.1.1. Macro Analysis

This analysis falls within Situational Analysis and is applied to an organisation to determine the external factors that are affecting them. This analysis is also known as DPESTLE and focuses on demographical, political, economic, social, technological, legal, and environmental external factors. For this study, only demographic, and economic factors will be discussed.

Below, it can be seen that South Africa has a large population in which 51% is female. It can be perceived that females are the ones who purchase the groceries (e.g. Farmer Brown products) regularly.

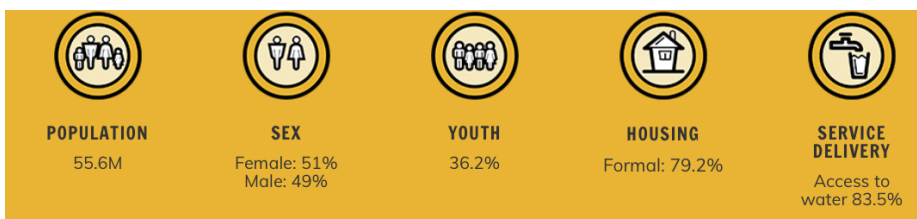


Figure 2.1: Demographics of South Africa
(Source: StatsSA 2016)

According to Oxford Business Group (2017), South Africa's economy has barely grown in recent years and the GDP per capita has not risen since to the global financial crisis in 2008/2009. South Africa is suffering as commodity prices are falling and the threat of increasing interest rates is taking their toll.

Unemployment is a major issue that South Africa faces.



Figure 2.2: Economic Factors of South Africa
(Source: Trading Economics, 2017)

Unemployment rates have risen again since the global financial crisis. Critics fear the future direction of South Africa as the country is moving from a liberal society to a nationalistic one.

2.1.2. Micro Analysis

The micro environment focuses on internal factors that have a direct effect on an organisation.



Figure 2.3: Micro Analysis Factors
(Source: LearnMarketing)

For the purpose of this study, only the following internal factors will be discussed: employees, customers, and competitors.

Employees

It is not yet known if Farmer Brown employees have belief in the message that Farmer Brown aims to send out as a brand. It is also unknown if these employees are employed with relevant skills and experience. RCL Foods needs to ensure that their brand Farmer Brown has ongoing training programs. According to LearnMarketing ([s.a]), if a brand employs people without motivation, skills or experience, it will affect the customer service and the sales.

Customers

Farmer Brown are not customer-orientated as they fail to market to their customers. They have not advertised in years, however, are still under the impression that people remember the brand and it will be the first choice. Farmer Brown need to design a marketing plan that aims to attract and keep customers through products that meet their customer's needs/ wants.

According to Afri Africa (2017), the consumption of chicken has grown rapidly, while imports grew from 8% of total consumption to more than 20% from 2010 to 2013. These imports attract consumers because of their low convenient price, nothing else. However, consumers are unaware of the poor quality that they are receiving by purchasing these imported products. While Europeans consume mainly white meat, they export their 'brown meat 'waste products' to South Africa.

The Millennial Generation

According to Margaret Rouse. ([s.a.]), the Millennial generation grew up in a socially-networked world. They grew up with electronics in their hands and they are said to be the generation that has received the most marketing attention (Margaret Rouse. [s.a.]). It is said that Millennials are tolerant of different and are often more optimistic about the future than other generations. Margaret Rouse. ([s.a.]), further explains that Millennials have the highest number of Facebook friends, which reiterates their place in the socially-networked world.

According to Fridman (2016), the Millennial generation are driven by profit and seek purpose, both in their personal lives and in the types of businesses they are starting.

According to J Public Health Res. (2013), Millennials grew up in an environment where health-related information was widely available to them through the internet, television, and other electronic media. Livio ([s.a.]), explains that Millennials pay great attention to food that is beneficial to their health as they are said to live by the term, “You are what you eat”, (Livio, [s.a.]). The Millennial generation is also perceived to be one of the more active generations. Currently, there is a fitness trend which most Millennials are trying to be part of and this just shows that Millennials are conscious about their health and want to lead a healthier lifestyle.

Competitors

Differentiation is key in marketing and when compared to chicken imports, Farmer Brown definitely has a unique selling point (USP). Their USP is that they offer fresh, ethically produced chicken in South Africa. Competitors produce ‘brown meat’ according to Brinkhus, Pitman, and Masemola (2017). These surplus off-cuts that are classified as waste and then sold to the South African market. It can be perceived that the quality of the competitor’s chicken products (imports) are not freshly produced the way Farmer Brown chicken is.

2.1.3. SWOT Analysis

Below is a SWOT analysis of Farmer Brown.

STRENGTHS	WEAKNESSES
• USP - ethical ways of treating chickens. • Brand tells unique story of friendly farmer brown and his ‘pet’ chickens. • Premium brand selling fresh quality products.	• Failure to market/advertise - SA market has forgotten about the brand. • Farmer Brown is a premium brand (more expensive) - consumers don't know why they are paying more.
OPPORTUNITIES	THREATS
• Choose alternative places to sell products. • Advertise and appeal to a new market in SA - reclaim their premium spot.	• Cheap chicken imports winning over SA consumers as they are a ‘cheap’ alternative. • Insufficient funds to continue with production.

Figure 2.4: SWOT Analysis

(Source: Authors own classification.)

2.2. Brand Equity

David Aaker ([s.a]), defines brand equity as a brand's set of assets linked to the brand name and its symbol, which add or take away from the value provided by the products/services.

Brand equity aims to build strong brands and this has shown to create a significant financial reward. Brands need to ensure that their equity is built with a strong foundation as this makes a brand less vulnerable during a marketing crisis, helps increase customer loyalty, and ensures a more favourable customer response to price increases.

Brands need to keep in mind that there are also factors that can affect brand equity and they are as follows:

- New products.
- Problems with products.
- Management change.
- Competitor actions.
- Legal actions.

Considering the points mentioned above, it can be seen that some of these factors have affected Farmer Brown's brand equity and could possibly be the reason why they are not doing as well as they should be. The major new product would be the 'competitor' imported chicken products that have flooded the South African markets.

Aaker ([s.a]), created a brand equity model which considers four sections. Each section provides value to a brand in certain ways.

Figure 2: Brand Equity Dimensions

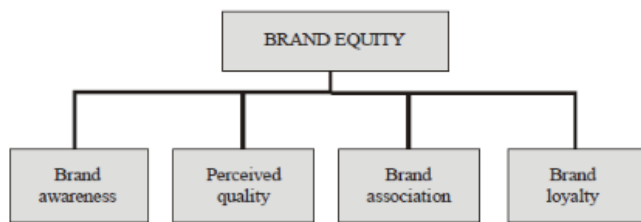


Figure 2.5: David Aaker's Brand Equity Model

(Source: Aaker and Joachimsthaler (2000))

Kevin Keller also has a brand equity model which differs slightly from Aaker's. Keller's brand equity model is also known as the Customer-Based Brand Equity model has four steps that represent core questions that consumers will subconsciously ask.

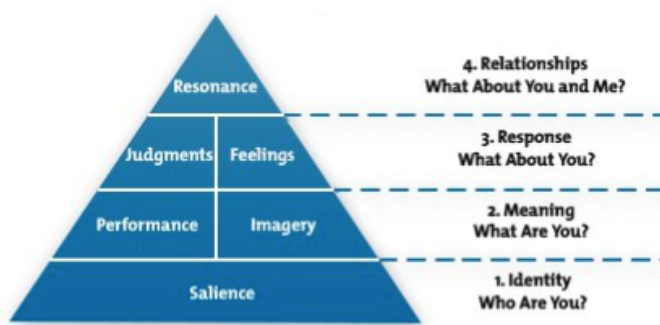


Figure 2.6: Keller's Equity Model

(Source: Strategic Brand Management: Building, Measuring, and Managing Brand Equity. Image by Kevin Keller.)

In consideration of the above two models mentioned, Aaker's model will be applied to the topic of Brand Equity and all the sections that fall into it - this will be discussed below.

Keller's model, however, will be applied and discussed at a later stage under brand perception.

2.2.1. Brand Awareness

Farmer Brown has little to no brand awareness. The brand has grown silent over the years and some customers even question its existence. The brand exists on RCL Foods'

website, however, there is very little information about the brand on the website. Farmer Brown has no social media pages, no official website, and no official advertisements anywhere in the market and this can be seen as a potential threat and reason as to why the brand is taking extreme strain during the chicken crisis.

According to Farmer Brown ([s.a]), they still believe that even though the television commercials have not broadcast in years, their branding has stayed with their customers. However, it can be perceived that Farmer Brown, a brand with a rich heritage in South Africa, grew old with its consumers. The brand once had a fair share of brand awareness as seen from the success of their television commercials, however, they have failed to re-advertise or re-appeal to the new South African market.

2.2.2. Perceived Quality

Farmer Brown was once perceived to be a premium brand in the South African market as they took care in ensuring their chickens were always fed with the best food (vegetarian) and lived in a cage-free environment. Farmer Brown showed consumers the friendly and ethical manner in which they treat their chickens by a variety of different television commercials. These commercials prided themselves on the fact that Farmer Brown's chickens "taste so good because they eat so good".

When compared to competitors, Farmer Brown stands out due to their ethical, caring and friendly farming nature. This allows customers to build a relationship of trust with the brand. This trust-based relationship emphasises the equity of the brand as consumers know that they are receiving premium chicken products.

2.2.3. Brand Association

This is a thought situated in the customer's mind about a brand. Brands should be associated with positive attributes so that customers can relate to the brand as a positive one.

According to Management Study Guide Experts ([s.a]), positive brand associations are created if a product that the brand says is desirable, durable and marketable. Customers must be persuaded that the brand has features that satisfy their needs as this will ensure

that customers will have a good impression of the brand and its products. "Positive brand association obstructs a competitor's entry into a market", (Management Study Guide Experts [s.a]).

As mentioned above, Farmer Brown is a brand that is associated with quality and care as they treat their chickens as if they were pets of their own - seen in their commercials. These commercials portray the brand acting as a family where friendly Farmer Brown cares for his pet chickens and ensures that they are eating food full of nutrients and living an adventurous life outdoors.

It was perceived that consumers should still be convinced by this storytelling method that Farmer Brown once portrayed to consumers as it adds value and shows the purpose of the brand. However, the brand has very little advertising/branding presence (making it no different to imported chicken products) and this could be the reason as to why the brand has fallen victim to the chicken crisis.

2.2.4. Brand Loyalty & Customer Loyalty

Brand Loyalty is based on customer preference. It occurs when consumers have a certain level of trust for a particular brand and feel that they need to continue purchasing the brands products or using their services because they satisfy their wants/needs.

According to Ngan (2008), there are four keys to customer loyalty:

- Customer loyalty is earned through a series of defining moments.
- Customers judge each moment based on specific service expectations (seamless, trustworthy, and resourceful).
- Customers experience each defining moment in the three dimensions of service (business, human, and hidden dimensions).
- Creating positive defining moments in every interaction will build a culture of service.

Customers are overwhelmed with new products continuously entering the market fighting for their attention. The chicken industry is a mess at the moment and with this said customers can no longer be loyal to Farmer Brown's brand as they have forgotten who they are. Farmer Brown (mentioned previously) fails to advertise/appeal to their selected target market and have grown silent over the years of being in business.

2.3. Impact of Brand Image

According to Zhang (2015), brand image is a driver for brand equity as it is the brand's current associations. For users, brand image is based on practical experience, and for non-users, it is based on uninformed beliefs, impressions or attitudes. The goal is to have your brand image align with your brand identity.

Keller's customer-based brand equity model suggests that brand awareness and image are the foundation for brand equity. Keller (1993) states that a positive brand image could be created by joining strong unique brand associations with consumers' memories about the brand through marketing campaigns. "Brand equity derives from a customer's confidence in a particular brand", (Lassar. 1995). Lassar. (1995) further explains that if customers have built a relationship with the brand and trust them, the more likely they will be willing to pay a higher price for its products/services.

Markets are flooded with brands and consumers often choose brands based on brand image rather than the actual product. When brand image aligns with the customer's values, the consumer is more likely to choose it. Adapting the self-concept theory to the impact of the brand image on customer purchase behaviour, it is perceived that consumers would take preference to a brand as long as the brand image aligns with their values.

2.3.1. Brand Perception

Brand perception is influenced by reviews, recommendations, and word of mouth. Brands may think that their product is the best and customers may think differently about this because they are from different ends of the spectrum. Brands need to ensure that they align with customer perception. According to Anastasia (2015), brand perception is a result of:

- Advertising/marketing.
- Previous experience of the customer with the brand.
- Reviews from trusted sources.

Farmer Brown need to consider how the public perceives their brand (realistic) and how do they want their brand to be perceived by the public (ideal) because right now these are two

different perceptions. Farmer Brown will need to conduct an internal check to ensure the brand is creating belief in its message and delivering its promise to consumers. They also need to make their brand available on social platforms and monitor how customers experience their products. They need to ensure that they manage complaints in the correct manner and that they have a reasonable pricing range, etc.

2.4. Brand Identity

A brand's identity includes elements such as its name and visual appearance. The identity is the way in which consumers recognise the brand and differentiate it from competitors in the market. Strong brands have clear identities.

Although there are a variety of different models that one can apply to assess a brand identity, this study will look particularly into Aaker's Identity Model. Although the entire model will be considered, for the purpose of this study, only relevant sections within the model will be discussed.

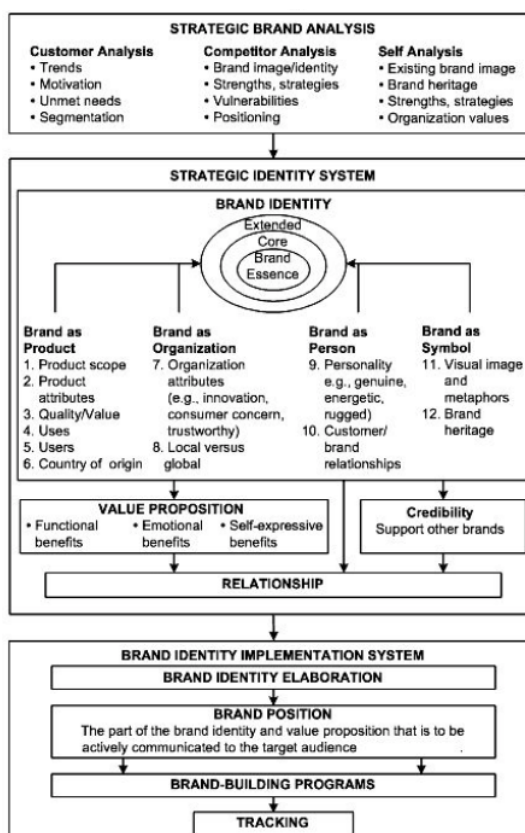


Figure 2.7: Aaker's Brand Identity Model

(Source: Brand Leadership. Image by David Aaker & Joachimsthaler, 2000)

Farmer Browns' identity was once clear in the minds of their customers, however, it has faded out over the years as they have failed to make themselves visible to their markets. Applying Aaker's' Brand Identity Model to Farmer Brown's brand, the following can be seen:

BRAND AS A PRODUCT	BRAND AS AN ORGANISATION	BRAND AS A PERSON	BRAND AS A SYMBOL
Farmer Brown is a premium product that ensures that the products (chickens) are treating in an ethical manner and are not pumped full of harsh chemicals that can be damaging to the consumer.	Farmer Brown are based in SA and are a trustworthy brand that consumers can confide in. Their products as mentioned before are only of the best quality to ensure customer satisfaction.	Farmer Brown are genuine and care for the lives of their chickens. They make sure that their chickens live a cage-free life and only eat the best quality foods. Farmer Brown treats their chickens as if they were pets - this can be seen by their television commercials.	Farmer Brown is rich with heritage as it is an 'old' brand that has grown up with South African markets. They make use of dark blue colours in their visual identity and these colours can be associated with forms of trust. They also use a symbol of an elderly man who represents Farmer Brown - this is something that consumers can associate with and it makes them build a further relationship with the brand.

Figure 2.8: Extended Brand Identity
(Source: Authors own classification)

When looking specifically at the Value Proposition section in Aaker's Brand Identity Model and assessing the different types of benefits that Farmer Brown gives, the following was noted:

FUNCTIONAL BENEFITS	EMOTIONAL BENEFITS	SELF-EXPRESSIVE BENEFITS
Farmer Brown has a functional benefit of being a chicken producer in South Africa.	At Farmer Brown, they prioritise the idea of producing chicken in an ethical manner. They are a brand who aims to form a bond with the consumer where they can trust that their chickens were treated ethically and are of superior quality.	People purchase Farmer Brown products because they want the quality.

Figure 2.9: Value Proposition
(Source: Authors own classification)

The position of Farmer Brown is something that needs to be actively communicated to the target market. Farmer Brown offers a range of chicken products that come in different forms (whole chicken, crumbed chicken, etc.) Due to the variants of each product, the costs will differ so that there is a product which everybody can afford. Farmer brown needs to consider re-positioning as this may leverage them back into a market or potentially into a new market space.

2.5. Customer Decision Making

Certain factors can affect the way in which a customer makes a decision whilst choosing a product or service. Narayan and Chandra (2015), performed a study in the Indian retail industry and understood that the growth in retail has accelerated rapidly, but despite this growth, some food retailers still face challenges.

Narayan and Chandra (2015) suggest that retail stores display products in the correct manner to make it convenient for customers to choose a product. Through an observation done at a Checkers Centre in Durban, it was understood that Farmer Brown products were not displayed in fridges that were convenient for customers. The products were often placed in corners of the fridges next to wide varieties of competitor products making it very difficult for the customer to even notice the Farmer Brown brand. When observing the imported chicken products placement in the store, it was noted that these products had their own row in the fridge.

An online article by Harpham ([s.a]), shows different factors that influence how consumers choose a brand. Harpham ([s.a]), suggests the following:

- What the brand says and how they behave.
- What external people say about the brand.
- Leaders or brand icons have a strong influence on shaping customers minds.
- Word of mouth/peer influence.
- Customer's brand perceptions.
- Customer's values and how they tie in with the brand.

A model by Schiffman and Kanuk. (2007) was adapted with the above article by Harpham ([s.a]). Harpham's article can be adjusted to fit the South African customer-decision making process. Majority of South Africans consider price before purchasing a product and often the cheaper alternative will do. Understanding that Farmer Brown is a premium brand and

targets a higher LSM in South Africa, the factor of price still plays a role in the purchase decision, along with how the brand acts and how they say that they act.

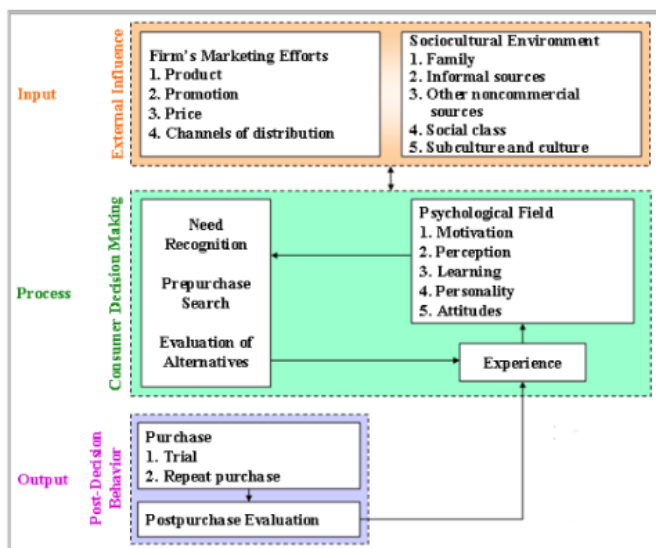


Figure 2.10: Customer Decision Making Model
(Image by Schiffman and Kanuk.)

Brown (2003), performed a study on customers preferences for locally produced food, this study was conducted in Missouri, however, is still relevant for South Africa. Brown's study suggests that quality and freshness was the consumer's main concern, and price came in at second. 73% of Brown's survey respondents believed that the quality of products was higher at farmer's markets (Appendix A, Figure 2.11). This is interesting when you look at Farmer Brown products which are sold in retail stores. Brown then asked household food buyers they would choose products who placed emphasis on being locally grown and identified that 79% of the respondents said that they would (Appendix A, Figure 2.11.1).

Brown's study shows that consumers want freshness and quality when they choose a particular product. South African consumers, for some reason, forget that imported chicken products are not as fresh as chicken products produced locally as they are considered to be 'brown meat' waste products as mentioned previously.

2.6. Resistance to Brand Switching

Lam, Ahearne, Hu, and Schillewaert (2010) studied the resistance to brand switching when a new brand comes into the market (Appendix A, Figure 2.12). Markets are competitive

and customers are able to choose from a variety of brands, as a result, they may develop more than one identification with multiple brands.

Marketing researchers state that brand switching is based on product attributes and the marketing mix. It can be perceived that today choice matters. This study suggests that there is a need to revive softer, non-product related attributes such as customers perceptions and beliefs into models of brand switching. These 'softer' qualities are important in predicting the choice of a brand.

2.7. Brand Revitalisation

This is a strategy that can be adopted when a brand/product reaches a stage where profits have drastically decreased. It's an attempt to bring the brand/product back in the market to secure equity.

According to Smirnova ([s.a]), there are three strategies that can be used for brand revitalisation. They are as follows:

- Adding new value.
- Repositioning.
- Extending the customer base.

Adding these three strategies, Business Jargon ([s.a]), has a diagram which suggests that a brand needs to be revitalised for a number of external reasons.



Figure 2.13: Reasons for Brand Revitalisation

(Source: Business Jargons. Image by Unknown)

Looking at the model from Business Jargon ([s.a]), one can see that Farmer Brown has increased competition now that imports have flooded South Africa's markets. However, Farmer Brown is still relevant as they are locally produced and ensure quality and freshness.

Business Jargon ([s.a]), also suggest ways to overcome the issues mentioned above:



Figure 2.14: How Brand Revitalisation Can Be Done
(Source: Business Jargon. Image by Unknown)

These correlate to the three strategies of Smirnova's ([s.a]) also mentioned above. Kevin Keller (1999), provides a detailed diagram suggesting steps a brand needs to take in order to revitalise their brand.

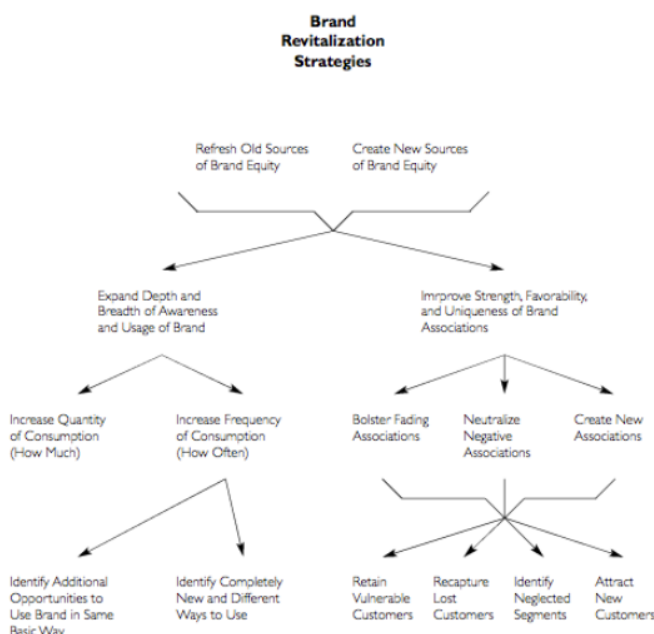


Figure 2.15: Brand Revitalisation Strategies
(Source: Managing Brands for the Long Run. Image by Kevin Keller, 1999)

Both figures have been combined and used to help Farmer Brown identify what strategies they need to put into practice.

Farmer Brown need to consider entering a new market and find new users that have a need for their high quality and ethically produced product. They need to reposition their brand in the South African market to make it relevant to a specific market. They can do this by having a voice that speaks directly to their customers and makes them feel involved in taking action against unethical low-quality imports.

Old Spice refreshed their 'old' brand by creating a campaign that was strategically and creatively sound. Unlike competitors, the integration between online social media, and television in this campaign breaks through the clutter. This campaign was approached holistically and was used on platforms such as television, and primarily YouTube in ways that were best suited for their selected target market.

Rohit (2010), summarises three marketing lessons that Farmer Brown can take away from the Old Spice Campaign all of which are relevant to the selected target market. They are as follows:

- Smart Strategy.
- Creative Execution.
- Cross-media integration.

2.8. Internal Brand Building

This is an essential element of any strategy. It is a holistic view of a brand and aids in building the brand from the inside out. It focuses on internal communications, internal marketing, and internal branding. It is understood that successful brands often have a foundation of 'good people' policies.

The Enterprise IG Buy-In Matrix helps one see that organisations are often made up of 'loose cannons'. Brands need to aim to grow and nurture more 'brand champions' and they will perform better.



Figure 2.16: Enterprise IG Buy-in Matrix
(Source: Michell 2005)

Internal Brand Building is a suggestion strategy that Farmer Brown needs to adopt and implement throughout their business first and foremost. They need to provide a compelling and true reason for employees to believe in their vision.

The Enterprise IG Buy-in Matrix drives emotional commitment. It helps one understand what will happen when employees are motivated to do their job. Engagement occurs when employees of an organisation hear and believe the brand's message, and for Farmer Brown employees to hear the brand's message Farmer Brown needs to communicate clearly what their brand believes in, why they believe in it, and what they aim to achieve by this belief system. Furthermore, Farmer Brown employees need to build an emotional connection with the brand as the brand's message needs to reach both the head and heart of every employee.

2.9. Summary of Literature

The above-reviewed literature is relevant to the research topic and the objectives of this study. The literature built a framework for this study and has expanded the researcher's knowledge on the theoretical elements related to the research problem.

Concluding this literature review, one is able to understand why Farmer Brown's brand has taken particularly bad to the chicken crisis in South Africa. As a brand that has failed to advertise for years stands little to no chance in the competitive market space. It can be perceived that consumers have favoured chicken imports because they are cheap and their poor quality products are not confronted by other local chicken producers who actually sell quality poultry products. From the literature revised above, it can be seen that

Farmer Brown needs to accept where they are in the market and work through these strategies mentioned above to help them regain their strength in the South African markets.

Chapter Three:

Research Methodology & Design

3. Introduction

The research proposal provides an in-depth breakdown of the research methodology which will be used by the researcher to conduct this study. This chapter will also consider the chosen research design, research approach, target population, selected sample size, sampling method, data collection method, data analysis method, construction of an interview & questionnaire schedule, a pilot study, validity and reliability testing and ethical considerations.

3.1. Research Design

There was a choice of three research designs that could be implemented for this study. They included: quantitative or qualitative research as well as the mixed methodology approach. Each of which will be discussed below.

3.2. Quantitative Research

Quantitative research helps determine the relationship between one thing (independent variable) and another (dependant / outcome variable) within a population. According to Susan E Wyse (2011), quantitative research is used to generate numerical data that can be transformed into usable statistics. This type of research generalises results from a larger population sample and formulates facts and uncovers patterns.

This research design is usually gathered by structured research instruments and can be replicated or repeated as it gives high reliability. According to Susan E Wyse (2011), quantitative research can be collected from the following methods: surveys, as well as face-to-face interviews, online polls, and observations. According to Babbie, Earl R (2010),

data collected from quantitative research is often arranged in charts, figures, tables or other non-textual forms.

3.3. Qualitative Research

Qualitative research is considered exploratory research as it is used to gain an understanding of opinions, beliefs, perceptions, and motivations. It provides deep insights into a problem.

Qualitative research can be collected in the following ways: unstructured or semi-structured techniques such as focus groups, observations, and interviews. The sample size in qualitative research is generally small.

3.4. Mixed Methodology Research

Johnson, R. B., Onwuegbuzie, A. J., & Turner, L. A (2007), state that mixed methodology research is where a researcher combines elements of both quantitative and qualitative research approaches to provide a deeper understanding and corroboration.

According to FoodRisc Resource Centre ([s.a.]), there are different mixed methodology approaches that a researcher can adapt to their study. These mixed methodology approaches have advantages as they provide strengths that offset the weaknesses of both quantitative and qualitative research, they also provide an approach for developing better and more specific instruments and explain findings and how causal processes work.

3.5. Adapted Research Methodology

Qualitative research is an approach that was utilised for this study. The qualitative approach is the preferred approach as it helped gain and interpret consumer insights and thus guided the study in a certain way, depicting the final outcome of what Farmer Brown would need to act upon. The following two research paradigms were adapted and joined as they both benefit the understanding of this study.

Constructivist's (Appendix A, Figure 3.1) believe that there is no single truth and thus reality needs to be explained. This approach is suitable for this study because reality needs to be interpreted and insights need to be found to aid the researcher in understanding reasons leading to the problem.

Constructivists make use of qualitative methods. Qualitative methods will guide the purpose of this study as the study needed to understand the opinions and behaviours of the selected sample population. However, the study may also include basic quantitative research methods.

(Appendix A, Figure 3.2) concluded that the Anti-Positivism paradigm was also used through this study as it stresses on the subjective approach to studying social phenomena and understands that qualitative research techniques such as interviews and observations are of great importance. This approach focuses on Ethnographic, Biographical, Phenomenological, and Case Study research methods.

3.6. Research Plan

According to Bradford, A (2015), inductive reasoning makes many observations, identifies a pattern, makes a generalisation and infers an explanation / theory. There is a constant interplay between deductive (based on theory) and inductive reasoning (based on observations).

The chosen research plan followed an inductive line of reasoning because inductive reasoning makes broad generalisations from specific observations. The theory used for this study addressed the problem of chicken imports flooding the South African markets, not giving our local South African brands a chance.

The inductive line of reasoning focused on an epistemological methodology approach, which according to Guba (1990), is categorised by "How do you know something and how do you go about finding it out". This approach ensured a holistic view of how knowledge was interpreted and was used in order to research and understand consumer perceptions on why they chose cheaply produced chicken imports over their once loved South African brand Farmer Brown. The research developed a conceptual framework as it focused on an analysis of Farmer Brown and the South African consumer's perception and behaviour.

A cross-sectional study design was utilised for this study as it aided the researcher in making comparisons at a single point in time.

3.7. Target Population

Target population refers to the people, event, brands, and products that are included in this study. Farmer Brown consumers who fell into the Western Cultural definition of 'Generation X', falling within LSM 8-10 are considered as participants of this study because it is perceived that this generation was most likely advertised to by Farmer Brown. Lower LSM groups will not be considered because Farmer Brown was considered to be a prestige, premium / quality brand.

Parents within Millennial Generation are also considered as they fall within upper LSM groups and make up a large population that one could perceive Farmer Brown is or should be targeting their products towards. It is perceived that this generation is most likely unaware of Farmer Brown as a brand, however, may have come across their products in certain stores.

The target population considers those who reside in the areas of Durban, as well as the surrounding suburbs. It is difficult to identity the population size as the researcher has no access to records in terms of how many people once did purchase Farmer Brown products to how many still purchase their products today. This study will be a small-qualitative study. Participants were split up into the following two groups:

3.7.1. Concentrated Generation X

Generation X included individuals born between 1965 - 1979. Within this variety of different individuals, the target population only focused on Generation X individuals who fell into LSM groups 8-10, specifically those who know Farmer Brown as a brand and purchased their products.

The researcher aimed to select 15 of these individuals to perform qualitative primary research on - to understand their perception and opinions of what Farmer Brown once was, to their perception of the brand today.

3.7.2. General Millennial Parents

A general selection of parents in the Millennial generation will be selected as this generation falls within the upper LSM groups. Millennials parents grew up in an electronic - filled and increasingly online, socially-networked world, (Margaret Rouse. [s.a.]). Their generation is seen as slightly more optimistic. Millennials parents are health conscious and have very active lifestyles.

The researcher aimed to select 17 of these individuals to perform qualitative primary research on - to understand their attitudes, opinions, and beliefs in everyday life as well as about brands. Their perceptions and purchase behaviour was also studied.

3.8. Sampling & Sample Size

Sampling is a process whereby a researcher selects factors (organisations, people, etc.) from a population of interest, (StatPac [s.a.]). Studying a selected sample may fairly generalise results back to the population from which they were chosen.

Sampling, according to StatPac ([s.a.]), relies on quantitative models, and the application of probability and non-probability sampling methods.

3.8.1. Sample Method

The variety of sampling methods fall into two different categories: probability and non-profitability.

Among the variety of sampling methods, a non-probability sampling method was obtained and focused specifically on convenience sampling.

Convenience sampling was used for the interviews, allowing the researcher to gain insights from the target population groups mentioned above with ease of access. Homogenous sampling was used for focus groups, as this type of sampling enables the researcher to choose individuals who share the same / similar characteristics, in this study, it would include either the Concentrated Generation X target population or the General Millennial Parents, which were both defined above. The homogeneous sampling aimed to give personal opinions and perceptions of Farmer Brown's brand, as well as their opinions

on their own preferences on everyday life / brands (what appeals to them and what does not), thus helping the researcher answer questions relating to the main objectives of this study.

All participants received a consent form to ensure that the study was conducted in an ethical manner (Annexure A).

3.8.2. Sample Size

According to Baker, S, Edwards, R ([s.a.]), it is suggested that graduates partake in qualitative studies with a sample around 30.

32 individuals were selected to participate in this study. According to Baker, S, Edwards, R ([s.a.]), this number is a manageable number and with the consideration that this study takes a qualitative approach, the number was sufficient. With 32 participants, the researcher was able to gain insights into opinions and perceptions of Farmer Brown as a brand in the minds of these individuals. Further identifying how Farmer Brown, a 'heritage brand' in South Africa, has been overtaken by imported chicken products and what they can do as a brand to act against the rising concern of the chicken crisis and make their brand a chosen brand in the 'consideration sets' of their intended target market.

3.9. Data Collection Method

Data collection approaches for qualitative studies, according to Hancock, B (2002), involve direct interaction with individuals either in a group setting or a one on one basis. Qualitative data collection methods can be time consuming and expensive, however, the benefits include that the information collected is richer and has deep insight.

The researcher, in all data collection methods, presented the consent form (Annexure A) to participants to ensure that the researcher had permission to use the information acquired from the participants.

One may notice that similar questions are asked to participants in multiple data collection methods and this is to cross-verify and ensure that the information that is gathered is

legitimate and insightful because what people say they do, what they think they do and what they actually do are all completely different things.

The chosen data methods for this study include the following:

3.9.1. Questionnaires

McLeod (2014), suggests that questionnaires provide a quick and easy way of collecting information from a large sample of people. The information from questionnaires is obtained quickly. However, McLeod (2014), states that the problem with questionnaires is that participants often lie due to social desirability. As humans, we want to present positive images of ourselves and may lie to look good or to manipulate and bend the truth. McLeod (2014), also suggests that the researcher constructs the questionnaire so that it is easy to read, understand and interpret regardless of all different education levels and literacy rates.

According to McLeod (2014), questionnaires are able to measure opinions, attitudes, perceptions, and behaviours of large amounts of participants quickly and cheaply. There are two types of questionnaires: open-ended, and closed questions.

According to McLeod (2014), open-ended questions allow individuals to express themselves and the way they think in their own words and are suitable to gather in-depth answers from participants. The researcher has chosen to make use of open-ended questionnaires to fully understand the chosen participants attitudes, and opinions on their perception of Farmer Brown's brand.

15 individuals from both target population groups (Concentrated Generation X and General Millennial Parents) were selected to fill out the two different open-ended questionnaires (Annexure B). These questionnaires were based online and were sent to participants via email.

3.9.2. Focus Groups

Focus groups, according to Gigi DeVault (2017), are a gathering of selected individuals who partake in a planned discussion intended to understand consumer perceptions about

a specific topic of interest. "Focus groups allow members to interact as well as influence each other during the discussion" (DeVault. 2017).

During a focus group, the researcher is able to observe the participant's behaviour and their body language and this can help generate great insight.

Focus groups were conducted for this study, enabling the researcher to gain rich information in a manageable and suitable time frame in a manageable situation. The researcher understood both advantages and disadvantages as well as the limitations of a focus group before conducting it.

Broadly designed questions helped to guide the discussion in the focus group. These broad questions allowed for a free exchange of the participants experiences, opinions, perceptions, and attitudes in consideration of the study, (Nieuwenhuis, 2016). Participants were chosen to express their opinions, perceptions, and attitudes on the study with no judgement.

The previously mentioned target population groups, General Millennial Parents, participated in a focus groups (Annexure C). This focus group consisted of 6 General Millennial Parents. All participants were allocated to a date, time and venue. Both focus groups took place in suitable facilities.

The researcher chose to conduct focus groups to allow for a casual discussion among a group of individuals sharing similar interests, to gain their opinions and attitudes towards Farmer Brown as a brand as well as their opinions pertaining other regular brands - what aspects appeal to them and what does not.

3.9.3. Structured & Unstructured Interviews

According to The Working Centre ([s.a.]), structured interviews are where participants are asked questions in a predetermined style. An unstructured interview, however, is unrehearsed and more casually conducted. Unstructured interviews, according to The Working Centre ([s.a.]), allow the conversation to be free-flowing and may even be conducted in the spontaneity of a particular event.

Both structured and unstructured interviews were conducted for the purpose of this study (Annexure D). One structured Interview was planned with somebody in the Farmer Brown marketing department to understand how imports have been able to take over local South African brands and flood our markets. However, this structured interview could not take place as nobody replied back when they were contacted.

The second structured interview aimed to target the head of somebody in this industry, gaining insight into consumers perceptions regarding the industry and the difficulties of competing with imports.

The unstructured interviews included 5 individuals to understand their decision making processes around purchasing chicken products (what appeals to them and what does not, etc.)

3.10. Data Analysis Method

Content analysis was a method used to analyse the data collected. According to Latha (2016), content analysis is a combination of quantitative and qualitative research. According to Ratcliff ([s.a.]), content analysis looks at documents, or speech and interprets what themes / patterns emerge. It is theory driven and looks at what participants talk about most and sees how themes / patterns relate to each other.

There are two types of content analysis: conceptual and relational analysis, according to Palmquist (1980). Although relational analysis applies more to the intent of this study, both types have been applied because relational analysis builds on conceptual analysis by identifying relationships among concepts, however, relational analysis has been focused on.

According to Human Factors Methods ([s.a.]), there are certain steps that a relational analysis needs to follow and these steps will be used to analyse the data in a content analysis format. The steps include:

- Reduce the text to categories to code for words or patterns.
- Explore the relationship between concepts.
- Code the relationships.
- Perform statistical analyses.

- Map out the representations graphically.

3.11. Validity, Reliability & Trustworthiness

Validity and reliability are important factors in a qualitative study and will be considered in this particular qualitative study to ensure that information is valid and that it is reliable in terms of accuracy. This means that the researcher has to ensure that qualitative studies are carefully analysed and interpreted.

3.11.1. Validity

According to Phelan and Wren (2006), validity is the assessment to how well a study measures what it claims to measure. Alone, reliability is not sufficient because for a study to be reliable it needs to be valid.

There are many different types of validity testing, according to Phelan and Wren (2006), however, for this qualitative study, sampling validity was applied, as according to Phelan and Wren (2006), this type of validity ensures that the study covers a broad range of factors within the concept of the study. Using sampling validity, the researcher understands that not every aspect can be covered and therefore items need to be sampled from all areas.

3.11.2. Reliability & Trustworthiness

According to Phelan and Wren (2006), the term reliability is the standard to which an assessment tool produces a stable and consistent set of results. The study was conducted professionally and the researcher believes that if a similar study had to be done, similar findings will be found.

Internal consistency reliability was the type of reliability adopted by the researcher for this particular study. According to Phelan and Wren (2006), this type of reliability testing is used to determine the degree to which different test items that investigate the same construct produce similar results. Furthermore, an average inter-item correlation, the subtype of the above-chosen reliability type, was obtained by the researcher. According to Phelan and

Wren (2006), this subtype takes all items on a test that investigate the same construct and determines the correlation for each pair of items.

3.12. Questionnaire Construction

Two questionnaire schedules were designed and tailored accordingly to each of the population groups; one targeted the Concentrated Generation X (Annexure A) and the other targeted the General Millennial Parents (Annexure A). The questions asked were linked to the objectives of this study to ensure that the correct data was obtained and collected. Each participant was provided with a consent form (Annexure A) to prove that their permission was given for the researcher to use their information for this study, anonymously.

3.13. Pilot Study

A pilot study, according to McLeod (2014), is a small-scale practice test before the main study is conducted. A pilot study allows the researcher to test the study with a selected few individuals so that if problems arise they can then be altered before the main study. It is beneficial because it saves time and money, (McLeod, 2014).

The questionnaires, unstructured and structured interviews, and the focus groups were tested on a group of 5 individuals in order to determine if the questions asked could be clearly understood and answered with ease. Questions were examined to make sure that they kept to the objectives of this study. The researcher also made use of the pilot study to identify how long the overall process of filling out the questionnaires would take to ensure that the timeframe was suitable for all participants.

A further pilot study was conducted with the structured interview aimed for the individual providing their opinion of why Farmer Brown has lost its top place in the market space and how imported chicken has been able to take over local South African brands and flood our markets. This pilot study was performed to ensure that all questions were asked in an ethical manner, able to gain thorough insight into understanding what has happened to Farmer Brown as a brand.

3.14. Anticipated Contribution

The researcher believes that the most important contribution of this study will include gaining a deeper understanding of consumer perceptions and preferences with regards to brands in their retail stores - what appeals to them, etc. Another important aspect of this study is looking at Farmer Brown as a local brand and understanding how they were 'taken over' by cheaply produced chicken imports, and what this diminishing position means to them as well as for South Africa.

3.15. Ethical Considerations & Limitations

According to McLeod (2014), it must be ensured that the information given by the participants is kept confidential. The researcher must be aware of this and keep everything confidential to reduce the likelihood of any psychological harm such as embarrassment for their honesty, (McLeod 2014). Before any information is collected, informed consent forms must be completed prior to any questionnaire or interview to make sure that the participants have the right to withdraw at any time.

The researcher has made use of the clearance forms provided by their campus and the IIE, as the topic of the study may be sensitive to the brands involved. Informed consent forms were also designed by the researcher (Annexure A) and given to every participant to ensure that the study was conducted in an ethical manner and that each participant understood that their information will be used (anonymously) to benefit the findings of this particular study.

Furthermore, the researcher ensured that this particular study remained ethical by instilling the following practices throughout the data collection methods and in the overall study:

- All participants remained anonymous and were able to withdraw from the study at any point if they felt uncomfortable.
- The researcher remained professional and transparent with all participants and made sure to inform them on the study before asking any questions.
- The researcher made sure to interpret findings and thereafter communicate with participants if confusion arose to ensure that their responses were not misinterpreted.
- Ethical clearance forms, as mentioned previously, were obtained from the IIE.

Limitations to this study included time constraints. Therefore questionnaires were filled out via online platforms, also ensuring participants had ease of access and were able to fill out the questionnaire privately in their own space and in their own time. Interviews were conducted via emails.

3.16. Summary

The research methodology aided the researcher in adopting the correct research design and approach to carry out this study. As mentioned previously, the researcher chose to use a qualitative and basic quantitative approach for this study to understand core insights on opinions and perceptions of the participants who took part in this study. The researcher believes that a sufficient and target population and the manageable sample size were identified and therefore data collection methods as well as data analysis methods, could be clearly selected and placed per target population group. The researcher thereafter made sure that a pilot study was conducted with an adequate number of participants to ensure that the data collection methods were fully understandable and the researcher was able to gain knowledge of how they will be conducted prior to final testing. Validity, reliability and trustworthiness testing were practiced by the researcher to ensure the credibility of the study in consideration of if it had to be duplicated by another researcher. In the following chapter, the findings and insights from the data collection methods and analysis will be presented.

Chapter Four:

Presentation of Discussion and Findings

4. Introduction

This chapter discusses and presents the data collected through the interview schedule and the focus group. The data is presented in a figures / charts format for the ease of interpretation. The data was analysed as per the research methodology which was discussed in Chapter 3. It is of importance to note that this was a small-scale qualitative study and therefore is not statistically sound as the results are not generalised. Given that is a qualitative study, valuable insights were gained from participants.

No conclusions will be made in this chapter, however, the conclusions will be clearly stated in Chapter 5.

4.1. Presentation and Discussion of Findings

Figures / charts have been presented based on research findings and highlight particularly the important factors. The findings are presented as to how questions and objectives are related. Although charts and figures are often used in quantitative studies, they have a qualitative approach and they are utilised to shorten the length of the interview by pointing out key themes and patterns that have occurred. The qualitative issues have been analysed in themes, and where necessary, word clouds have been designed.

As discussed in the previous chapter, data collection methods were reliable and trustworthy because the study was conducted in an ethical manner.

4.1.1. Demographics of Respondents

Basic demographic information has been provided from all data collection methods so it is clear that certain ages were targeted over others.

4.1.1.1. Age Demographics

Age demographics have been split up into the two population main groups: Concentrated Generation X and General Millennial Parents for the ease of interpretation.

● Between 38-52 ● Between 21-35
● Age Not Specified

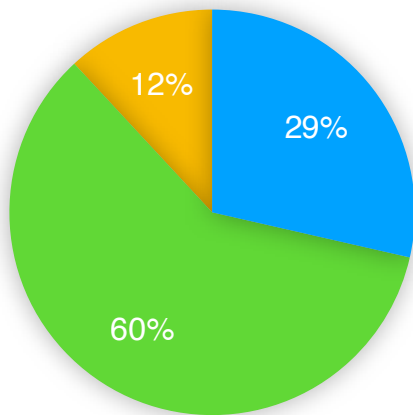


Figure 4.1: Age Groups from Data Collected
(Source: Authors Own Classification)

General Millennial Parents aged between 21-35 were focused on as they form the basis of the target population that one can presume Farmer Brown should be targeting. The Concentrated Generation X group aged between 38-52 was also an important group because their responses helped the researcher understand what Farmer Brown was doing right back in the day.

4.1.1.2. Discussion & Results

Presented below are the results captured from the respondents who participated in this study. The results have been shown in a table format and are discussed beneath each of the tables. One can identify that this format is presented similarly to quantitative formats, however, the results have been discussed from a qualitative approach and themes and patterns have been identified and discussed.

4.1.1.2.1. Concentrated Generation X Findings

The findings presented below conclude the results captured from the questionnaire. The findings are as follows:

- Concentrated Generation X respondents said that the old Farmer Brown advertisements that used to push the message, “They taste so good because they eat so good” and said that this is one of their greatest memories of the Farmer Brown brand.
- A common statement from the respondents was that they felt as if they had a trusted relationship with the Farmer Brown brand because their advertisements were relatable and resonated well.
- Respondents said that Farmer Brown put their needs as consumers first.
- A common response is that respondents in this generation still purchase Farmer Brown products as they are their favourite brand, while others said that they have not seen the brand in years.

Below is a word cloud that sums up the responses from the Concentrated Generation X population that filled out the questionnaire provided.



Figure 4.2: Concentrated Generation X Farmer Brown Associations
(Source: Authors Own Classification)

4.1.1.2.2. General Millennial Parents Findings

The findings presented below conclude the results captured from the questionnaire and focus group. The findings are as follows:

- Respondents said that a brand is something they trust as it is something that adds to or becomes part of their personality, and they trust it will deliver quality.
- Respondents said a brand is a personality that you buy into.
- Woolworths was a favoured brand and appeared often in the respondent's list of their 5 top brands.
- It was commonly noted that quality attracts people to a brand, while others said that price attracts them. The other responses can be seen below:

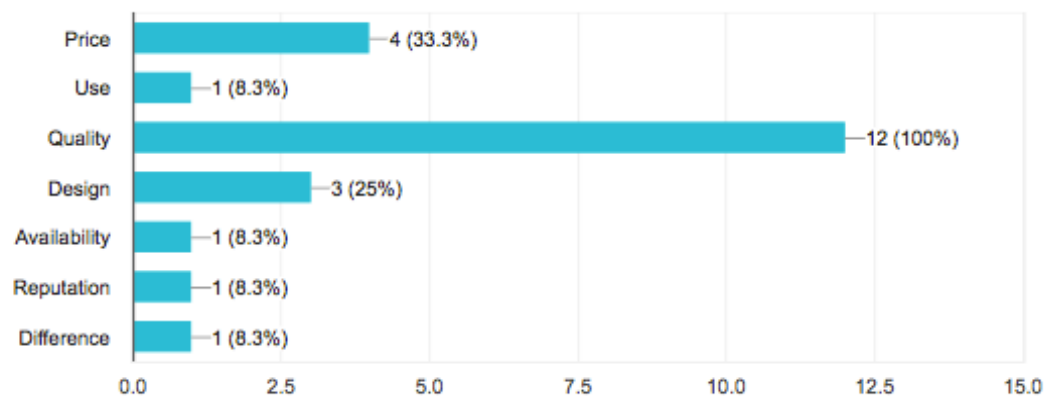


Figure 4.3: What Attracts Millennials to Brands
(Source: Authors Own Classification)

- Respondents said that they preferred to do their grocery shopping at Spar, while others preferred Woolworths. The other responses can be seen below:

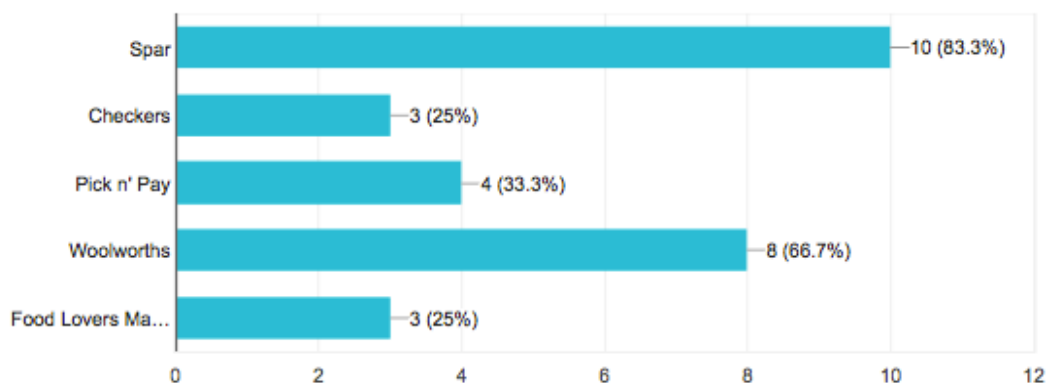


Figure 4.4: Where Millennials Prefer to Grocery Shop
(Source: Authors Own Classifications)

- Spar & Woolworths were preferred because it was clean and offered quality products. Respondents also mentioned that these particular stores offered less of a variety than others, and therefore did not overwhelm or distract them with so many product / brand choices.
- Respondents stated that if they see the terms 'locally produced', 'organic', or 'ethically produced' on packaging, these products grab their attention and appeal to them on a more personal level.
- Respondents stated that brands need to embody the following characteristic in order to gain their trust:



Figure 4.5: What Brands Need to do to Gain Millennials Trust
(Source: Authors Own Classification)

- Respondents said that their preferred poultry brand is Rainbow Chicken as this brand offered a wide variety and could be found at nearly every store with ease. The respondents also stated that Rainbow Chicken products were of good quality at a good price that they could afford.
- Millennial respondents were not really familiar with the Farmer Brown brand.
- Respondents stated that they were unsure as to which poultry products were produced locally over those that are imported.
- Respondents said that their perception of imported chicken was negative as the products are usually very cheap but bad quality, pumped with chemicals and not fresh.
- It was commonly seen that respondents prefer to purchase locally produced products over imported ones if they were made clearly aware of which products were locally produced.
- Respondents said that they purchase products regularly - 4-6 times a month. The other responses can be seen below:

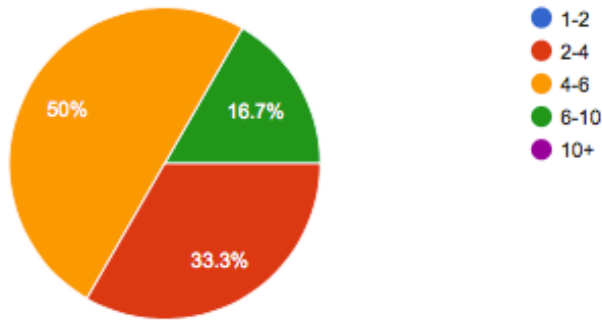


Figure 4.6: How Often Millennials Purchase Poultry
(Source: Authors Own Classification)

- Crumbed chicken and chicken fillets were popular product choices among the respondents. The other responses can be seen below:

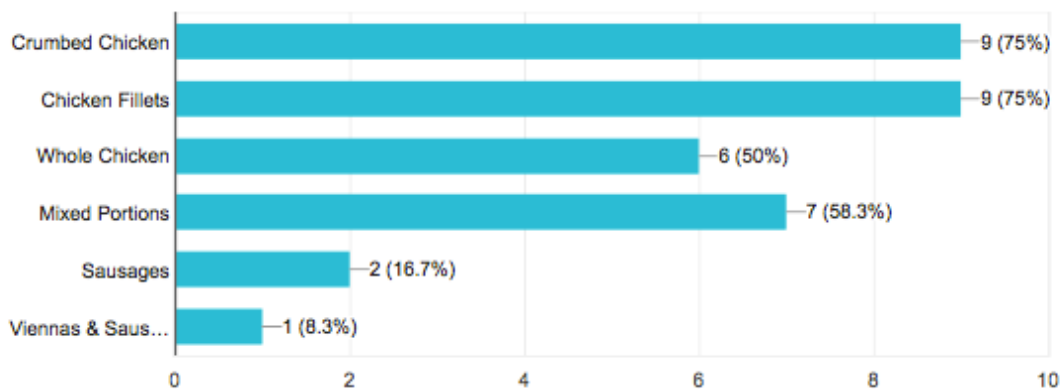


Figure 4.7: What Poultry Products Millennials Purchase
(Source: Authors Own Classification)

- Respondents said that they like Food Lovers Market and Woolworths over stores like Checkers because they offer fresher products and more quality. The only issue that the respondents mentioned was that Food Lovers Market and Woolworths had very steep prices for their products.

4.1.1.2.3. Random Shopper Findings

The findings presented below conclude the results captured from random shoppers who participated in the unstructured interview held at a local store in Durban. The findings are as follows:

- All respondents stated that they prefer to purchase local brands because they are fresher and are of better quality.
- Respondents said that they like to support local brands because it makes them feel good that they are supporting their own country and helping to grow the economy.
- Most of the respondents stated that lower prices attract them to brands, however, they consider the lower price as well as the quality of the product. They stated that they would rather purchase a product at a slightly higher price if it is better quality.
- Majority of the respondents said that they don't have a particular brand that they choose on a regular basis, they just see what looks good and then purchase it.
- Respondents said that they were fairly familiar with the brand Farmer Brown as they have seen it in stores.
- The respondents were not initially aware of the quality of imported products until the researcher explained to them, they did not consider it previously.

Below is a word cloud that sums up the responses from the local shoppers.



Figure 4.8: Shoppers Characteristics and Their Product Wants
(Source: Authors Own Classification)

4.1.1.2.4. Industry Member Findings

The findings presented below conclude the results captured from industry members who participated in the structured interview. The findings are as follows:

- Imports are a major threat that the South African industry is currently facing.
- The respondent stated that lowest price normally always wins.

- South Africa local brands could have avoided being taken over by imports if the government would have intervened more avoiding the dumping of chicken products. poultry companies could have done a better PR job, by informing the population and could have informed the government of the effects of long term.
- The respondent stated that if local products were sold at cheaper rates then they would appeal more to South African consumers as lowest price will attract most demand.
- The respondent agreed that South African brands have failed to communicate their messages across to their audiences effectively. The local poultry brands have not been very vocal in selling themselves.

4.2. Insights

- Brands need to communicate a message that is different and that resonates with their target markets.
- Brands need to consistently and effectively communicate their message across to their intended target markets in order to create an indelible impression in their mind space and become the chosen brand in their purchasing decisions.
- Farmer Brown has failed to communicate at all with the new emerging generation of Millennials and therefore have faded out the market due to their lack of awareness.
- South African consumers are often un-loyal to brands because brands lack difference and have failed to position themselves correctly.
- Local poultry brands often do not have a voice and rely on the idea that consumers purchase their products because it is a food commonly consumed.

Chapter Five:

Conclusions and Recommendations

5. Introduction

In this chapter findings are presented and are accompanied by conclusions and recommendations. The conclusions and recommendations will be made in relation to each objective of this study. Suggestions for further research have also been stated.

5.1. Objective One

To understand Millennial consumers mindsets in context, as this is the generation Farmer Brown should be currently targeting.

5.1.1. Findings from Literature

According to Margaret Rouse. ([s.a.]), Millennials grew up with electronics in their hands and have been part of the socially-networked world since young. Margaret Rouse. ([s.a.]), explains that the Millennial generation appreciate difference and are optimistic about the future, unlike other generations. Due to Millennials growing up in a socially-networked world, their need to feel part of a community is high. Millennials have the highest number of Facebook friends and this just reiterates their global and local connectivity, (Margaret Rouse. [s.a.]),

According to J Public Health Res. (2013), Millennials grew up in an environment where health-related information has been widely available to them through the internet, television, and other electronic media. Livio. ([s.a.]), explains that Millennials pay great attention to food that is beneficial to their health as they are said to live by the term, “You are what you eat”, (Livio. [s.a.]). The Millennial generation is also perceived to be one of the more active generations. Currently, there is a fitness trend which most Millennials are trying to be part of and this just shows that Millennials are conscious about their health and want to lead a healthier lifestyle.

5.1.2. Findings from Research

From the primary research conducted, it was found that the Millennial respondents preferred locally produced products because they were fresh and were usually of a high standard. The research proved that Millennials want ethically produced products as they are a generation that cares about the environment and they want to invest in brands where they know their will get added value. According to Fridman, A. (2016), Millennials want there to be a purpose behind everything brands do. They are not just looking at the profit or the money involved, they asking questions like “how does it affect the planet, society, and the bottom line?”, (Fridman, A. 2016). Millennials are looking for the tipple bottom line.

The research conducted proved that Millennials want products that are ethically produced and are 'organic' as they want these products to benefit their health as well as not harm the environment or the planet. As discussed previously, Millennials are triple bottom line driven and research has proved that they need reassurance that the products they are purchasing are proudly South African. Millennials want to support local brands but are often unaware as to which ones are local.

From the research conducted, it was noted that Millennials prefer shopping local as when they shop local they feel as if they are giving back to their community and country. Millennials stated that they prefer shopping at quality stores such as Spar, Woolworths, and Food Lovers market because they are not overwhelmed with such wide varieties of different brands. However, it was also noted that Millennials were slightly hesitant to shop at stores such as Woolworths or Food Lovers Market because their prices were high. Further research concluded that Millennials are considerate of price, however, are willing to pay extra for brands / products that are of a better quality. Quality is something that gains the Millennial consumer's trust, and it is something that Farmer Brown needs to flaunt.

Research proved that the more 'prestige' poultry products such as crumbed chicken and chicken fillets appeal to the Millennial consumer more. It is perceived that these products have been favoured because they are convenient and easy to cook, as this generation want quick and easy.

5.1.3. Conclusion

Although Stein (2013) states that the Millennials are a 'me me me' generation, it can be seen that Millennials do care about more than just themselves. They are a considerate generation that cares for the triple bottom line and wants to invest their time and money into brands that they know will give them quality, added value, and not harm the environment or the planet. Millennials are also very conscious beings, they want to invest not in a healthy lifestyle but a healthy mind, body and, soul.

5.1.4. Recommendations

From the research findings previously discussed, it is recommended that Farmer Brown focus on the following aspects to directly target and appeal to the Millennial generation:

Farmer Brown need to place their focus on changing the stores in which their products are sold at. Currently, it has been found that Farmer Brown products are sold in Checkers / Shoprite stores, and it is perceived that these stores offer a wide variety of the same category products at cheaper rates. Since Farmer Brown is considered to be a prestige poultry brand, it is suggested that they sell their products in Shops like Spar, Woolworths, or even Food Lovers Market. Research has proved that the Millennial favours these stores and shops at them on a regular basis. With this said, Farmer Brown will be in the Millennials sight when they are shopping for their poultry products and the brand will have a better chance of being chosen by the Millennial consumer.

As discussed previously, Millennials prefer the prestige poultry products such as crumbed chicken pieces and chicken fillets. Farmer Brown is not doing particularly very well in the South African market and it is perceived that they are running at a loss because nobody is purchasing their products. Farmer Brown can invest in only producing these 'prestige' poultry products as they are what the consumer wants. By doing this, Farmer Brown can eliminate the loss of funds from selling chicken products that consumers are not wanting. It was also noted that imported poultry products were often in the forms of whole chickens or mixed portions and this appealed to the lower and middle class consumers, however, if Farmer Brown decide to only invest their money in 'prestige' poultry products targeting middle and upper class consumers, then they will not be competing directly with the imports.

Farmer Brown need to ensure that all their communication on their packaging as well as on any other medium, communicate that the brand is locally produced in South African, is ethically produced, and is of high quality (not pumped with harmful chemicals) in order to grab the Millennial consumers attention. If their communication carries through those messages, consumers will start to trust the Farmer Brown brand and recognise that they are a brand that is trying to make a difference by adding value - selling more than just a mere chicken product.

Linking to the literature which explains how Millennials are very health conscious, it is recommended that Farmer Brown state clearly on their packaging as well as through their communication channels that their products are ethically produced and do not contain harmful chemicals. Their products are 'organic' and therefore will benefit ones health rather than be detrimental in anyway.

5.2. Objective Two

Understand why Farmer Brown has become a 'forgotten' brand and build strategies that could potentially help them regain their strength in the market.

5.2.1. Findings from Literature

Consumers make decisions while choosing brands. Harpham. ([s.a.]), points out different factors that have influence over how consumers choose brands:

- What the brand says and how they behave.
- What people say about the brand.
- Word of mouth / peer influence.
- Customer's brand perceptions.
- Customer's values and how they tie in with the brand.

Harpham ([s.a.]), discussion fits in the South African context. Majority of South Africans consider price before purchasing a product and often the cheaper alternative will do. Understanding that Farmer Brown is a premium brand and targets a higher LSM in South Africa, the factor of price still plays a role in the purchase decision, along with the quality of the products, how the brand acts and how they say that they act.

Brand revitalisation is a strategy that needs to be considered when profits decrease. This is something currently happening to Farmer Brown and it is therefore an opportunity to attempt to bring the brand 'back to life' and secure equity. Smirnova ([s.a]), explains that brands can revitalise by repositioning, adding new value or extending the customer base.

5.2.2. Findings from Research

The primary research identified that concentrated generation X respondents said that Farmer Brown was once very good with their advertisements because of their unique appeal. A common thread between the respondents was that they felt that they had a trusted relationship with the Farmer Brown brand. However, over the years that have passed without having Farmer Brown's brand presence impact their lives, consumers have lost touch with the brand and have forgotten about them because there have been so many new brands in the same category fighting for their attention.

When further research was conducted with general Millennial parents, it was found that very few respondents knew the Farmer Brown brand. This just shows how the brand has vanished out the South African market within a few years.

5.2.3. Conclusion

Farmer Brown can be considered non-existent in the South African market. Consumers have forgotten about the brand as they have not advertised in years. Consumers went further to say that they do not purchase Farmer Brown brands and barely see them in store, and when they do, they are tucked away in a corner - hidden. It is perceived that the reason Farmer Brown has become a forgotten brand in the South African market is because they have failed to advertise or communicate to the population. Therefore they have very little presence and impact on South African consumer's lives. From the research conducted, it can be noted that Farmer Brown has grown old with their target market, which is perceived to be generation X individuals.

5.2.4. Recommendations

From the research conducted it has been understood that Farmer Brown has aged with its consumers, leaving the new generations clueless about the brand. Saying this, it is recommended that Farmer Brown enter a new market and find new users that have a

need for their high quality and ethically produced products. They need to reposition their brand in the South African market to make it relevant to a specific market. They can do this by creating a voice that speaks directly to their customers and makes them feel involved in taking action against unethical low-quality imports.

It is recommended that Farmer Brown target middle to upper class Millennial parents. As seen from the literature, Millennials are health conscious beings that want to invest in brands and products that are beneficial to their health and are not harmful to the environment. Millennial parents want the best for their children and care just as deeply for them as they do themselves. Farmer Brown would be a perfect match for Millennial parents because of these factors.

5.3. Objective Three

Change the consumer's mindset about local vs. imports and eliminate imports being the 'go to option' when purchasing chicken products.

5.3.1. Findings from Literature

Consumers trust brands that satisfy their needs and wants. As previously discussed in Chapter 2, Ngan (2008), explains that consumers are overwhelmed with new products continuously entering the market. Through secondary research previously conducted, consumers can no longer be loyal to Farmer Brown because they have forgotten who they are. Farmer Brown fails to advertise or appeal to the new Millennial generation and has grown silent.

Changing a consumer's mindset is fairly difficult. Markets are competitive and consumers can choose from a variety of brands and this may cause them to develop more than one identification with multiple brands. As previously discussed in Chapter 2, consumers want non-product added value.

Brown (2003), suggests that quality and freshness was the consumer's main concern, and price came in at second. Through secondary research it was noted that South African consumers forget that imported chicken products are not as fresh as chicken products

produced locally as they are considered to be 'brown meat' waste products as mentioned previously.

5.3.2. Findings from Research

From the research conducted it was understood that majority of respondents within the population group of general Millennial parents as well as random shoppers preferred purchasing locally produced brands because they perceived the quality of local products to be of a fresher and higher quality. As discussed previously, Millennials felt that supporting local brands made them feel good because they were supporting their own country and helping to grow the South African economy. Although respondents were very adamant about supporting local brands, most of them stated that they were unsure as to which brands were locally produced and which were not. The research concluded that the respondents were not initially aware of the poor quality of imported poultry products, and only after it was brought into consideration, they changed their views and agreed to it being poor quality.

With consideration of the South African economy, it is perceived that lower prices are something that majority of South Africans taken into account when purchasing products. Research proved that although lower prices attract people to brands, however, the middle-upper class Millennial respondents would consider the price along with the quality and evaluate if their purchasing decision was worth it. Respondents stated that they would rather pay extra for a product that is offering more quality.

5.3.3. Conclusion

South African consumers generally want to support locally produced products because they feel that doing so helps give back to their community. However, most consumers are unaware of which brands are locally produced over those that have been imported into the market.

5.3.4. Recommendations

From the research findings previously discussed, it is recommended that Farmer Brown focus choosing the correct communication channels to effectively communicate to their target market who has been suggested to be general Millennial parents. Even though

Farmer Brown is taking strain, they fall under the parent brand RCL Foods and therefore it is perceived that they have potential funds to develop and support brand growth.

Farmer Brown will need to 'get with the times' and become part of the South African consumers lives again. To do this, they need to immerse themselves into communication channels that are favoured and will effectively relate to the Millennial generation. As discussed previously, the Millennial generation need to know that they are receiving quality and that there is added value to the products that they are purchasing. Farmer Brown will need to ensure that all communication reinforces the brands quality and added value - how they not only produce poultry products but they do so in an authentic way, caring for their chickens and offering products that are not harmful to consume or detrimental to the environment.

To target the Millennial generation, Farmer Brown can start off by creating a social media account on Facebook. It is suggested that Farmer Brown create a Facebook page to engage with their audience.

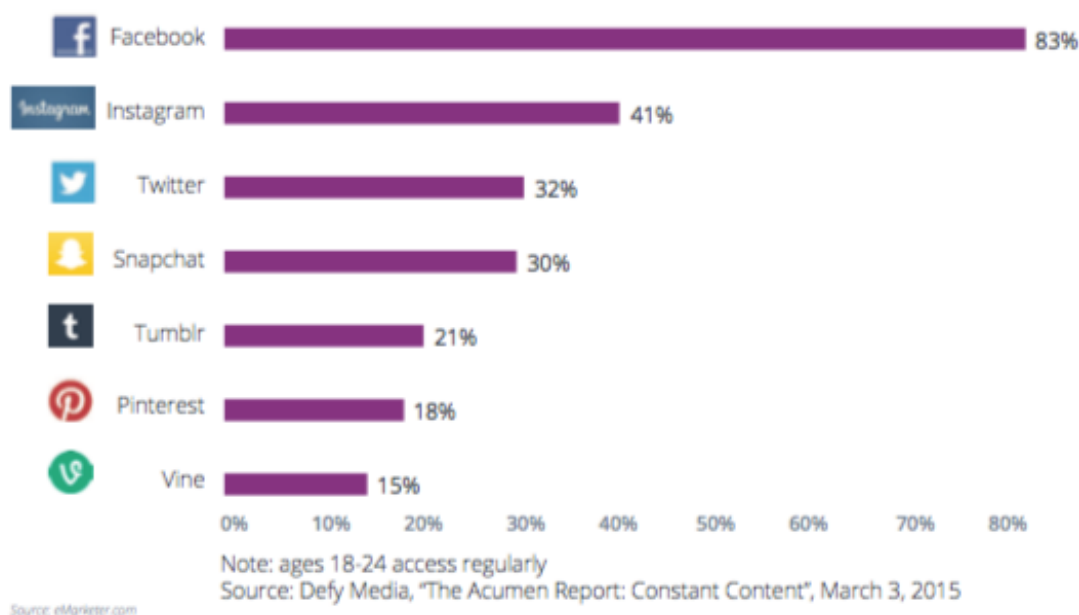


Figure 4.9: Social Media that Millennials use Actively
(Source: Quad Graphics. [s.a.])

The content from the Facebook page will be of an authentic, honest, and caring nature. This type of content will resonate well with the Millennial mothers as they would be able to trust the brand and its offerings knowing it is a good quality product for them to purchase

for their families to enjoy. It is also suggested that Farmer Brown eventually develop their own branded website that stands alone from the RCL website. This will allow consumers to look up information on the brand and its offerings.

According to Long (2016), a powerhouse brand name does not seem to be enough to capture Millennials interest or loyalty. Long (2016) states that the Millennial generation are receptive to high-end private labeled branding with products that are affordable but high quality and are packaged like they are exclusive or private brands. With this said, Farmer Brown needs to ensure that their packaging portrays that they are a brand that is locally produced and are therefore fresh and of premium quality.

5.4. Suggestions for Further Research

It is suggested that a statistical study is conducted to test whether increasing the brand awareness of Farmer Brown will impact the Millennial generation and persuade them into purchasing the brand on a regular basis.

A larger scale study should also be conducted on Millennial consumers to assess their opinions and perceptions as well as what could be done in order for Farmer Brown to improve their market share in South Africa. It is also suggested that a larger scale study is conducted with members of the industry to understand their opinions and find out clearer facts regarding the issues that the chicken production industry in South Africa is currently facing.

5.5. Closing Comment

This qualitative study helped understand how Farmer Brown, a brand with rich heritage, has almost faded out the South African market. This study examined Farmer Brown's past brand image and identity to the one it has today. The researcher set out to determine what Farmer Brown could do as a brand to regain their strength in the market and successfully target the Millennial generation. Research proved that the Millennial generation were largely unaware of the Farmer Brown brand and therefore recommendations have been given to help guide Farmer Brown into effectively targeting this generation. Research consisted of multiple data collection methods and was conducted with industry members, general Millennial parents, and concentrated generation X consumers. The results and

findings from this research proved that general Millennial parents and concentrated generation X consumers had different views and opinions about the Farmer Brown brand and the imports which have flooded the South African markets.

The South African chicken production industry, as stated previously, has lost its voice and therefore they are losing a battle against imports. In order to take back their place in the market they will need to set money aside into creating content that can communicate effectively through to their target audiences. The findings discussed in chapter 4 help to understand the general Millennial, their opinions, preferences, etc. From the recommendations stated above, it is suggested that Farmer Brown reposition their brand and start to target a different audience which the researcher has recommended to be the Millennial generation.

Recommendations have been suggested for further research, and if implemented by Farmer Brown, should contribute to a vastly improved brand image, increase their market share and overall brand perception within South Africa.

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Appendices

Appendix A

Concern	Percentage
Most important concern when buying fresh fruits and vegetables	(N = 523)
Quality/freshness	82
Price	8
How the produce was grown	4
Nutritional value	3
Convenience	2
Where the produce was grown	1
How does produce quality at farmers' market compare to supermarket?	(N = 534)
Quality is higher	73
Quality is the same	10
Quality is lower	1
Don't know	16
How do produce prices at farmers' market compare to supermarket?	(N = 532)
Price is higher	12
Price is the same	20
Price is lower	43
Don't know	25
Reasons purchase produce at farmers' market	(N = 478)
Produce quality and selection	45
Locally grown	18
Price	6
Direct contact with the grower	5
Buying for canning or freezing	3
Atmosphere of the market	2
Never shopped at a farmers' market	21

Figure 2.11: Brown's survey results on consumers' concerns when shopping for fresh fruits foods, comparison of farmers' market produce to supermarket, and reasons consumers shop at farmers' markets.

(Source: Cheryl Brown's' Study. Table by Cheryl Brown.)

Table 2. Characteristics of survey respondents compared to area residents.

Characteristic	Respondents (%)	Census Five county average (%)
Total household income (1999) (US\$)	(N = 484)	(N = 66,285)
<10,000	7	13
10,000-24,999	21	25
25,000-49,999	37	33
50,000-74,999	22	17
>75,000	13	12
Education level ¹	(N = 529)	(N = 109,131)
Some high school	7	25 ²
High school degree or equivalent	36	39
Some college	21	17
Technical college degree	6	3
College degree	16	11
Graduate or professional degree	13	5
Location of housing	(N = 535)	(N = 72,943)
Town >5000	48	53 ³
Subdivision outside town	5	
Town <5000	16	
Rural	31	47 ³
Households	(N = 533)	(N = 66,150)
With child aged < 18	36	35
With individuals aged 65 and over	26	26
Average household size	2.6	2.5

Figure 2.11.1: Brown's survey results on characteristics related to responses to the question: Do you, or would you, seek out products with the AgriMissouri label or with a 'Southeast Grown' label over those without such a label?

(Source: Cheryl Brown's' Study. Table by Cheryl Brown.)

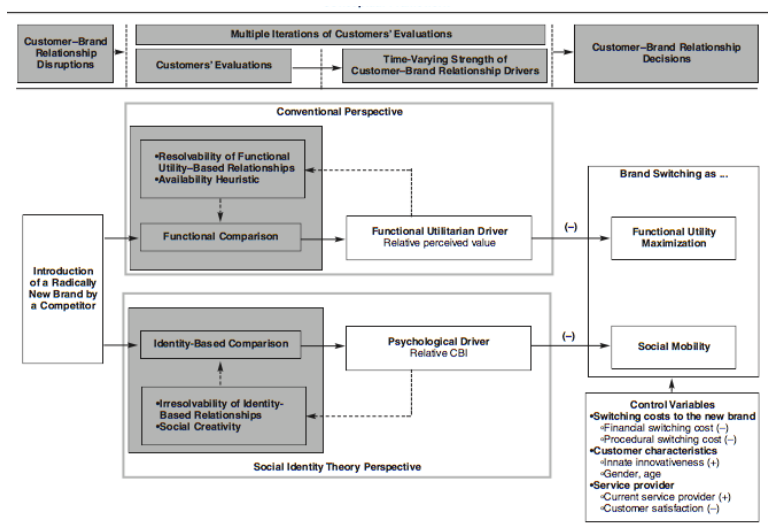


Figure 2.12: Resistance to Brand Switching

(Source: Diagram by Son K. Lam, Michael Ahearne, Ye Hu, and Niels Schillewaert.(2010))

Paradigm	Ontology <i>What is reality?</i>	Epistemology <i>How can I know reality?</i>	Theoretical Perspective <i>Which approach do you use to know something?</i>	Methodology <i>How do you go about finding out?</i>	Method <i>What techniques do you use to find out?</i>
Positivism	There is a single reality or truth (more realist).	Reality can be measured and hence the focus is on reliable and valid tools to obtain that.	Positivism Post-positivism	Experimental research Survey research	Usually quantitative, could include: Sampling Measurement and scaling Statistical analysis Questionnaire Focus group Interview
Constructivist / Interpretive	There is no single reality or truth. Reality is created by individuals in groups (less realist).	Therefore, reality needs to be interpreted. It is used to discover the underlying meaning of events and activities.	Interpretivism (reality needs to be interpreted) • Phenomenology • Symbolic interactionism • Hermeneutics Critical Inquiry Feminism	Ethnography Grounded Theory Phenomenological research Heuristic inquiry Action Research Discourse Analysis Feminist Standpoint research etc	Usually qualitative, could include: Qualitative interview Observation Participant Non participant Case study Life history Narrative Theme identification etc
Pragmatism	Reality is constantly renegotiated, debated, interpreted in light of its usefulness in new unpredictable situations.	The best method is one that solves problems. Finding out is the means, change is the underlying aim.	Deweyan pragmatism Research through design	Mixed methods Design-based research Action research	Combination of any of the above and more, such as data mining expert review, usability testing, physical prototype
Subjectivism	Reality is what we perceive to be real	All knowledge is purely a matter of perspective.	Postmodernism Structuralism Post-structuralism	Discourse theory Archaeology Genealogy Deconstruction etc.	Autoethnography Semiotics Literary analysis Pastiche Intertextuality etc.
Critical	Realities are socially constructed entities that are under constant internal influence.	Reality and knowledge is both socially constructed and influenced by power relations from within society	Marxism Queer theory feminism	critical discourse analysis, critical ethnography action research ideology critique	Ideological review Civil actions open-ended interviews, focus groups, open-ended questionnaires, open-ended observations, and journals.

Figure 3.1: Constructivist Approach to Research Paradigm

(Source: Salma Patel. Table adapted from various sources, including Crotty (1998))

Research paradigms	Research approach	Research methods	Examples
Positivism	Quantitative	Surveys: longitudinal, cross-sectional, correlational; experimental, and quasi-experimental and ex-post facto research	- Attitude of distance learners towards online based education - Relationship between students' motivation and their academic achievement. - Effect of intelligence on the academic performances of primary school learners
Anti-positivism	Qualitative	Biographical; Phenomenological; Ethnographical; case study	- A study of autobiography of a great statesman. - A study of dropout among the female students - A case study of a open distance learning Institution in a country.
Critical theory	Critical and action-oriented	Ideology critique; action research	- A study of development of education during the British rule in India - Absenteeism among standard five students of a primary school

Figure 3.2: Anti-positivism Approach to Research Design
(Source: Online Research Methods.)

Annexure A



27/09/2017

Dear

ETHICAL CLEARANCE LETTER

Your research proposal and ethical considerations were reviewed by your supervisor and moderated by the campus research panel.

☒ Your research proposal posed no significant ethical concerns. We hereby provide you with ethical clearance to proceed with your research methodology.

OR

☐ Your research proposal posed the following minor concern:
Please mention how your research design will address this issue:

N/A

In the event of you deciding to change your research methodology in any way, kindly consult your supervisor to ensure all ethical considerations are adhered to and pose no risk to any participant or party involved. A revised ethical clearance letter will be issued.

We wish you all the best with your research!

Supervisor Name: Gareth

Supervisor Signature: [Signature]

Campus Anchor Name: A R BOZAS

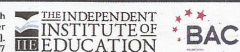
Campus Anchor Signature: [Signature]

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Informed Consent

VEGA School of Brand Leadership

Honours: Strategic Brand Communication Research Dissertation

Researcher: Ashleigh Paige Stone (076 220 0733)

Supervisor: Mr. Gareth Gray (072 304 4328)

Dear Respondent,

I, Ashleigh Paige Stone, am an Honours student at the Vega School of Brand Leadership and in order to complete my qualification, it is essential that I conduct appropriate research. I invite you to participate in my research project entitled; “ Claiming Back Our Chickens” Chicken Crisis Should Not Dampen The Spirits Of Our Local South African Heritage Brands.

South Africa has their own chicken producers, which are considered to be branded ‘rich with heritage’, and they have been able to build trusted relationships with their consumers throughout the years. The aim of this study is to gain insight into how ‘cheaply produced’ imported chicken products have been able to flood our South African markets with such ease. The study also aims to understand one’s perception of Farmer Brown as a brand as well as to interpret what Farmer Brown can do as a brand to help regain their strength in the marketplace.

Through your participation I hope to understand your perceptions of Farmer Brown as a brand, as well as your attitudes, opinions, preferences to brands and their products. Your participation in this research is voluntary. You may refuse to participate or withdraw from the project at any time with no negative consequence.

There will be no monetary gain from participating in this questionnaire / focus group. Confidentiality and anonymity of records identifying you as a respondent is assured. If you have any questions or concerns about completing the questionnaire or about participating in this study, you may contact myself or my supervisor at the numbers listed above. My supervisor will ensure that I comply with your terms of consent and with all ethical requirements. The questionnaire should take you about 20 minutes to complete. Your participation will be greatly appreciated.

Yours Sincerely

Investigator’s signature : _____ Date : 22/06/2017_____

VEGA School of Brand Leadership

Honours: Strategic Brand Communication Research Dissertation

Researcher: Ashleigh Paige Stone (076 220 0733)

Supervisor: Gareth Gray (072 304 4328)

CONSENT

I.....(full names of participant) hereby
confirm that I understand the contents of this document and the nature of the research project, and
I consent to participating in the research project.

I understand that I am at liberty to withdraw from the project at any time, should I so desire.

SIGNATURE OF PARTICIPANT

DATE

.....

.....

This page is to be retained by researcher

Annexure B

Concentrated Generation X Questionnaire Questions

- What is your greatest memory of Farmer Brown?
- Do you feel as if you had a trusted relationship with the brand Farmer Brown? If so, why?
- Do you feel that Farmer Brown put your needs, as a consumer, first?
- What is your perception of Farmer Brown today?
- Do you see Farmer Brown products in your retail stores? If so, which ones?
- Do you purchase imported chicken products over locally produced product? If so, why?
- Are you familiar with which products are locally produced and which are not?

(Above is a variety of questions that the researcher designed, targeting the Concentrated Generation X sample group.)

General Millennial Parents Questionnaire Questions

- What does a brand mean to you?
- What are your top five South African brands?
- What attracts you to a brand? (price, use, quality, design, etc.)
- Which store do you prefer to do your grocery shopping at? And why?
- If you see the terms 'locally produced', 'organic', or 'ethically produced' on packaging, would the product grab your attention and appeal to you more?
- In your opinion, how are brands able to gain your trust?
- Which is your preferred brand to purchase poultry products from? And Why?
- Are you familiar with the brand Farmer Brown?
- Are you aware of which poultry products are locally produced over those which are imported into South Africa?
- What does the term 'imports' mean to you?
- What is your perception of the quality of the poultry products that are imported into South Africa?
- Would you prefer to purchase locally produced products over imported ones if you were made aware that they are locally produced?
- In one month, how many times do you purchase poultry products? And what poultry products do you purchase (crumbed chicken, whole chicken, fillets, etc.)?
- Which is your preferred store to purchase groceries at - Spar, Pick n Pay, Woolworths, Checkers, or Food lovers Market)? And what stores do you avoid?
- How do you feel about Food Lovers Market and Woolworths compared to Checkers?

(Above is a variety of questions that the researcher designed, targeting the General Millennial Parents sample group.)

Annexure C

General Millennial Parents Focus Group Questions

- What is your preferred poultry brand, and why?
- Are you familiar with the brand Farmer Brown?
- What attracts you most to a brand / product? (price, design, use, local, etc.)
- Do you prefer to shop for food items in a regular store such as Spar, Checkers or Pick n' Pay, or would you prefer to purchase such items from a Farmers Market? And why?
- Within two weeks, how many times do you find yourself purchasing chicken products for dinners or lunches? What brand do you choose and why?
- Are you aware of which poultry products are produced locally and which are imported?
- What is your perception of these imported chicken products? Do you believe the quality is as good as our locally produced products?
- Is products that are 'chemical free' and 'organically and ethically produced' important to you and your family?

(Above is a variety of questions that the researcher designed, targeting the Concentrated Generation X sample group in the form of a focus group.)

Annexure D

Structured Interview Questions

- What is the most important quality that Farmer Brown believes their chicken products have?
- Who is your intended target market? And why have you chosen this particular group?
- Do you believe that Farmer Brown has effectively been able to advertise and appeal to this intended target market over the past few years?
- Do you believe that imported chicken products pose as a threat to the South African chicken production industry, specifically as a threat to Farmer Brown? If so, how?

(Above is a variety of questions that the researcher designed, targeting an employee of Farmer Brown in the form of an interview.)

Structured Interview

- Currently, what is the biggest challenge your industry is facing?
- Do you believe that imported chicken products pose as a threat to the South African chicken production industry? If so, why?
- In your opinion, how could have South Africa brands avoided being taken over by imported chicken products?
- What are the differences between imported chicken products and locally produced products?
- Do you think if locally produced products were sold at a lower price they would attract many more South African consumers?
- South African brands have failed to communicate their messages across to their audiences in an effective manner. Therefore have failed to attract South African's because their brands do not resonate enough in the consumers mindsets. Local chicken products are priced higher than imports. Do you think if local brands could effectively communicate with the South African market, creating an indelible impression in their mind space, they would be able to capture the markets attention again and become the preferred brand?

(Above is a variety of questions designed, targeted a manager in the chicken production industry)

Unstructured Interview Questions

- Do you prefer to purchase local brands over imported ones? If so, why?
- What attracts you to a particular brand? (price, design, use, etc.)
- When wanting to purchase poultry products, what brand do you choose and why?
- Are you familiar with the brand Farmer Brown?
- Are you aware of the quality of imported chicken products?

(Above is a variety of questions that the researcher designed, targeting 5 randomly selected customers at a local retail store in the form of an unstructured / casual interview.)