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Prepared for



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Quick Bites

Eating, Shopping, and Consumer Behavior Around the Globe

Roper Reports Worldwide
Global Market Intelligence Service

Lance Pierce
Manager,
Global Business Development



- **Roper Reports Worldwide: the Global Consumer Database**
- **Global Snapshots of:**
 - **Grocery Shopping**
 - **Brands**
 - **Demand for New Products**
 - **Who Makes the Best Products?**
 - **Food Preferences and Eating**
- **Putting it All Together**



Roper Reports Worldwide

The Global Consumer
Database

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Turning data
into intelligenceSM

About Roper Reports Worldwide

- Many consumers – 30,000 aged 13 to 65
- Many markets – 30 countries on all continents
- Many questions – 1 hour interview, 1,000+ answer categories
- Four waves of global study since 1995
 - latest wave data available in April 2000
 - 5th wave currently signing sponsors for Summer 2000
- Global consumer trends/lifestyles/behaviors database consulting service
 - proprietary segmentations by personal values, lifestage, cultural affinity + global brand values battery

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Geographic Coverage – 30 Countries

Americas

- United States
- Canada
- Argentina
- Brazil
- Mexico
- Venezuela

Europe

- Czech Republic
- France
- Germany
- Hungary
- Italy
- Netherlands
- Poland
- Spain
- United Kingdom

Asia

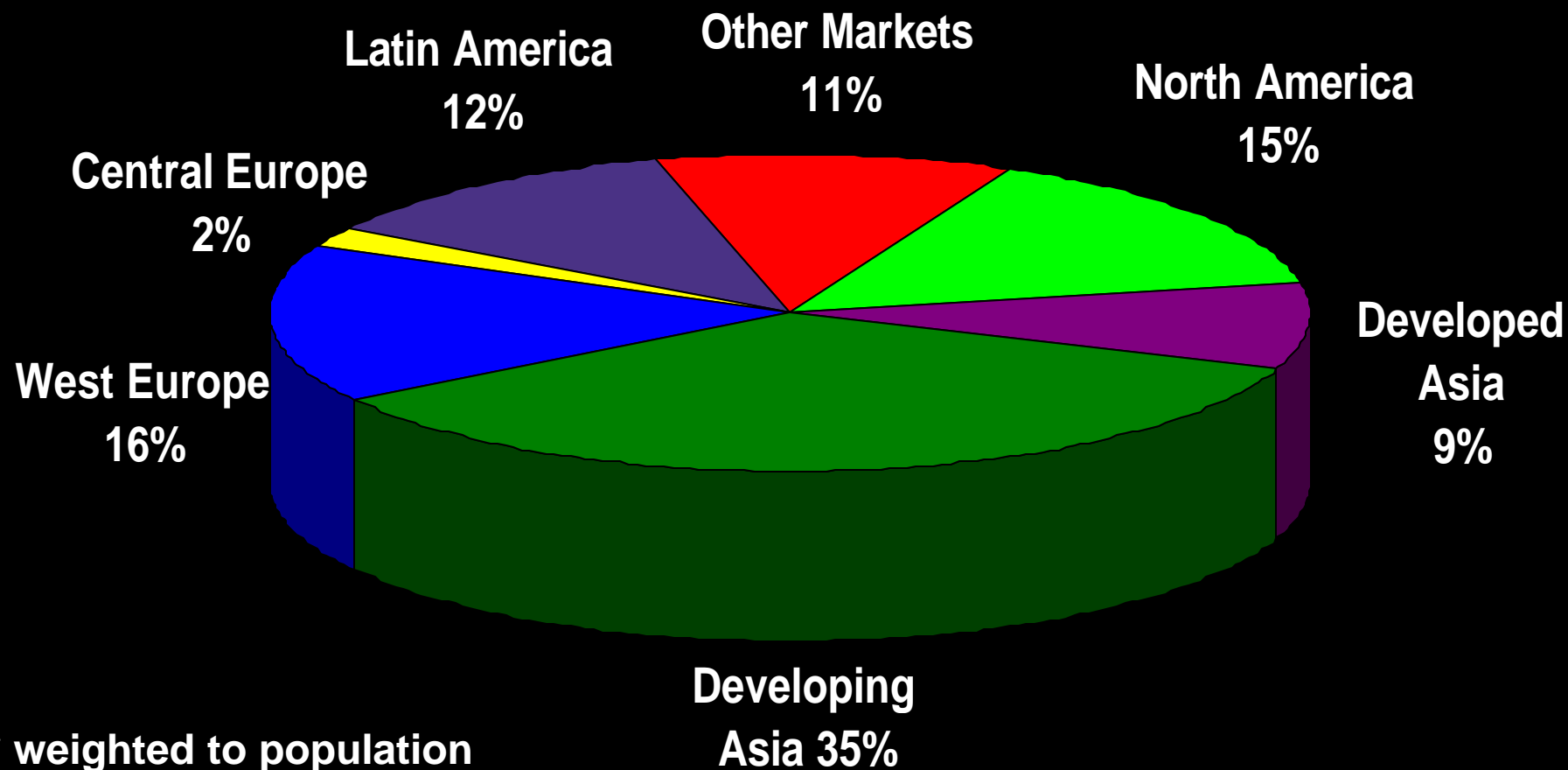
- Australia
- China
- Hong Kong
- India
- Indonesia
- Japan
- Korea
- Malaysia
- Philippines
- Taiwan
- Thailand

Other Markets

- Russia
- Saudi Arabia
- South Africa
- Turkey

Regional Distribution of Total Roper Reports Worldwide Sample*

Projected to 1.39 Billion Consumers





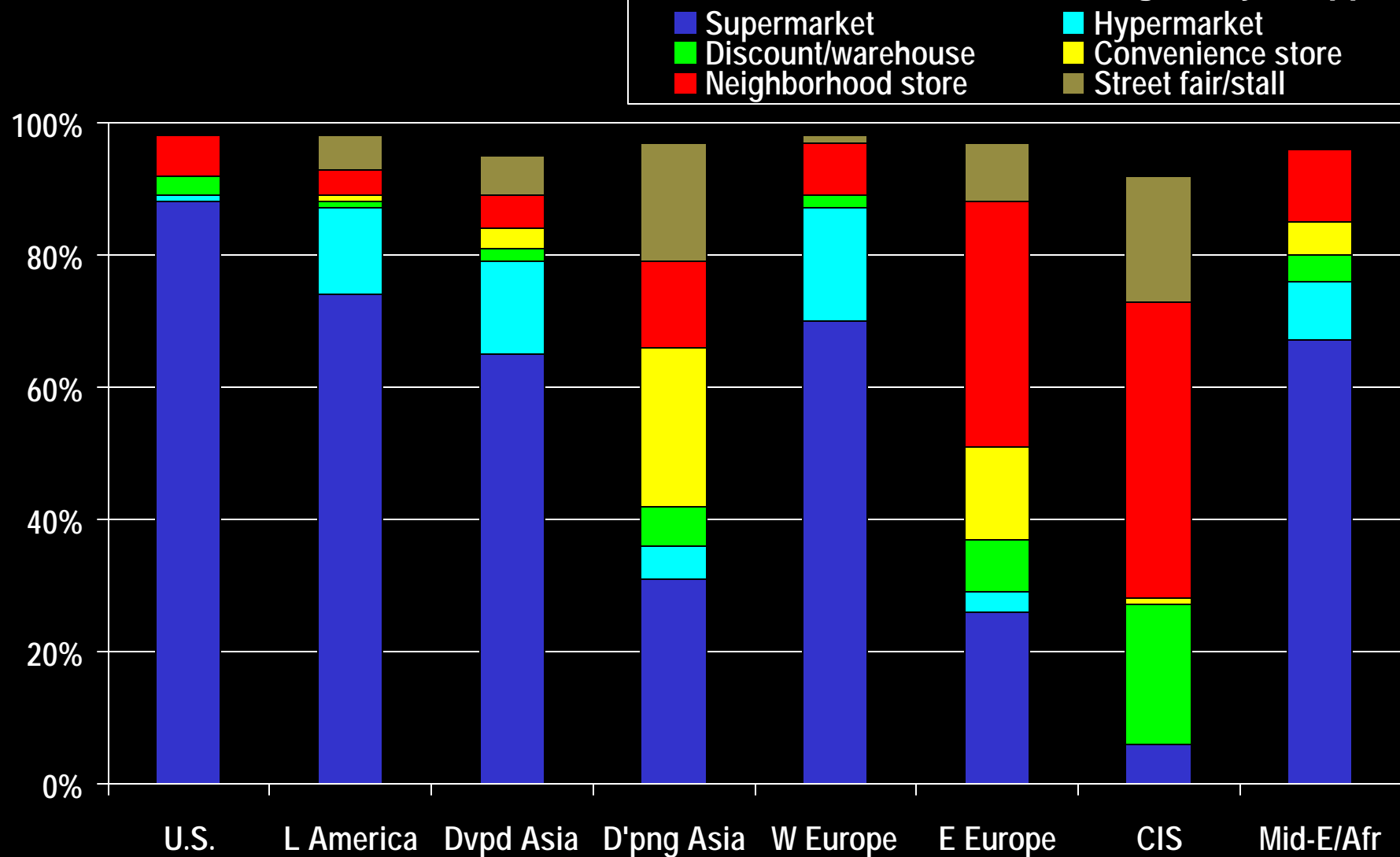
Grocery Shopping

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Food Distribution Channels: Supermarkets Mostly

where households do most of their grocery shopping

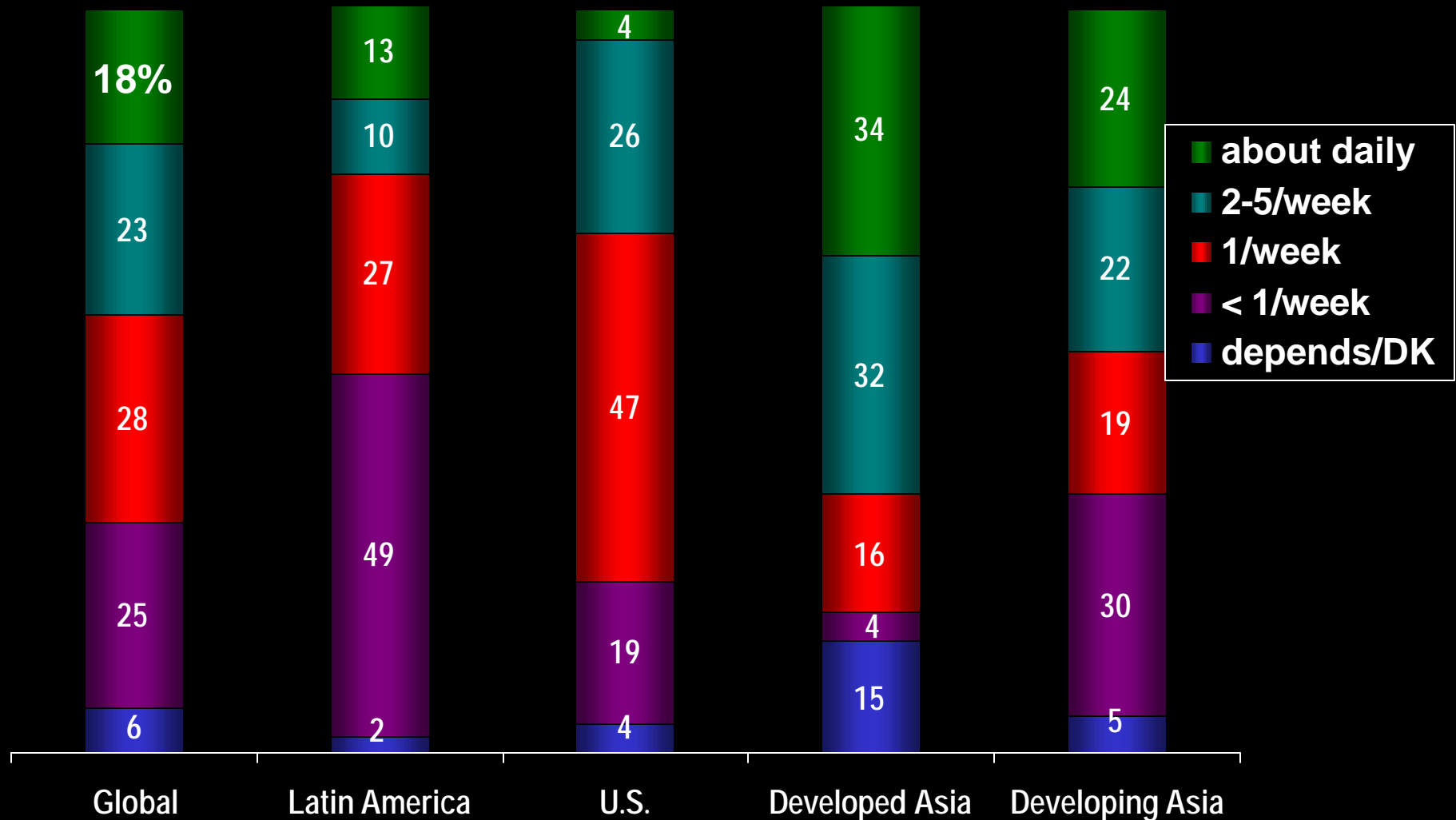


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Regional Shopping Frequency

similar pattern to US in: Western/Eastern Europe

grocery shopping frequency



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National Differences: When Do They Shop?

- **“Shopping-est” countries:** Indonesia (61% of households grocery shop almost daily), Uruguay (59%), Hungary (52%) and Japan (47%)
- **“Middle-of-the-roaders:”** Australia (61% shop 1/week), Great Britain (56%), France (53%) and U.S. (47%)
- **“Stocker-uppers:”** South Africa (70% shop 1-2x/month), India (69%), Brazil (60%) and Colombia (60%)

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Who Does The Grocery Shopping?

- Almost everyone (3 in 4 respondents) does at least some of the regular food shopping for their household; women do more than men do
 - and mothers do most of the household shopping
- The job is more equably divided in regions dominated by Socialist or former Socialist societies because men are more likely to help
- Latin Americans distribute the task even more broadly by getting everyone in their larger households involved
- Saudi Arabia is the greatest exception because of Muslim restrictions on women
 - men are twice as likely as women to do most of the shopping (42% Vs. 22%) and 47% of kids < 12 participate

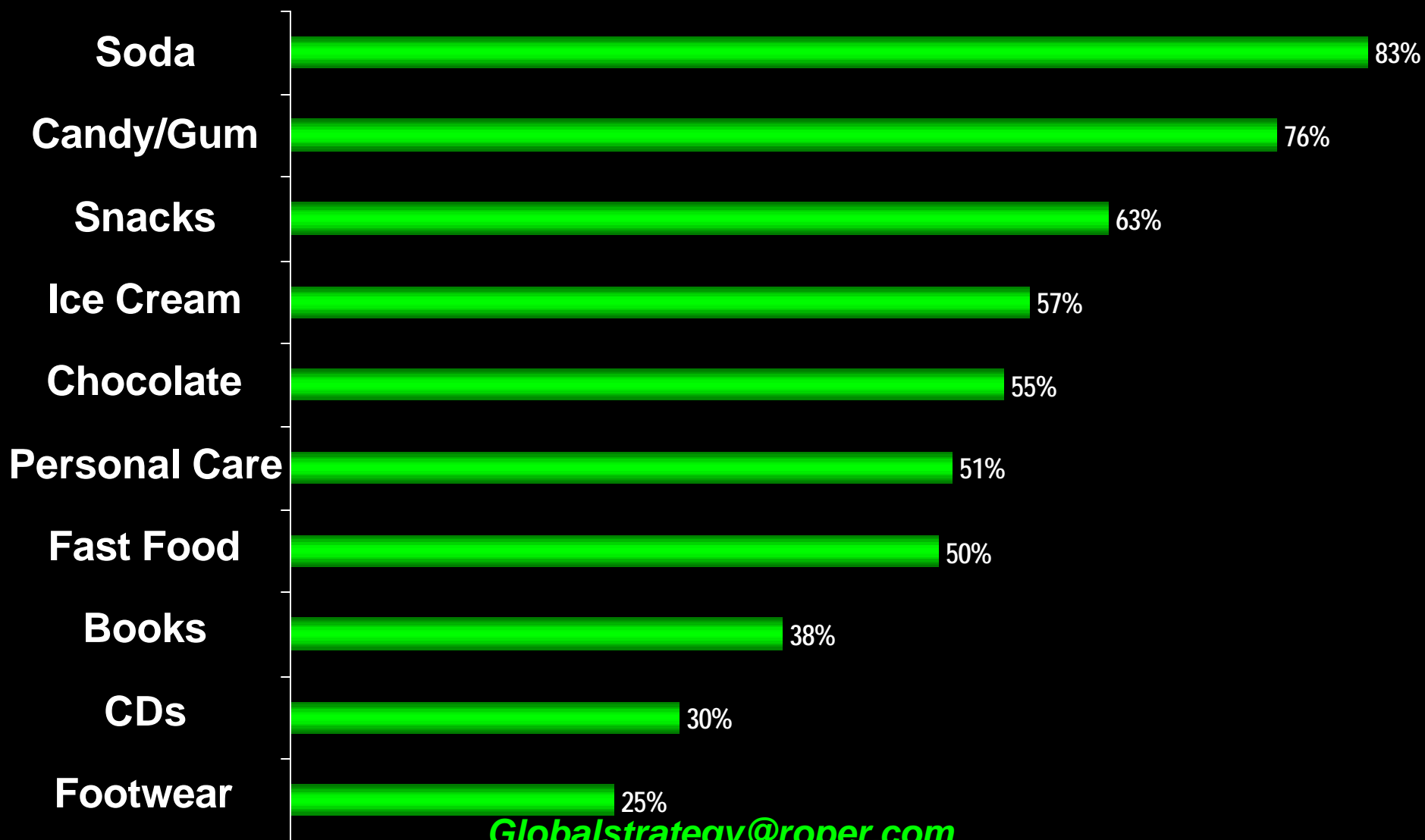
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Another Factor Determining Who Does and Doesn't Shop: Who Else Is There?

- **Latin American men and women do less shopping than those in other regions--why? Because they have bigger households**
 - **Average household size in Latin American sample is 4.3 people versus 3.7 global average**
- **Worldwide, the share of respondents who do most of their household's grocery shopping drops from 81% for those who live alone to 24% for those who live with at least 8 other people**

Teens Buy Few Groceries, But Lots of Personal Items

percent of the world's teens who bought items in past 30 days



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And a Child Shall Lead Them

- Kids under the age of 12 have a great deal of influence globally on foods purchases--clear, and in most cases, large majorities in all regions say this
- This is particularly true of “impulse buy” categories such as CSDs and snacks
- Marketing to kids, a tried and true formula in the United States, also shows signs of working as a strategy for global food retailers



Brands and Demand for New Products

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Favorite Brand Highlights

- Across personal-care, household, and food/beverages categories, an average of nearly half of respondents who have bought products in the past 30 days say they nearly always buy one favorite brand
- Food/beverage categories generally garner less brand loyalty than other domestic product categories, e.g. personal-care and household products
- Consumers in Developed Asia reveal weakest brand bonds--less likely to have favorites, to have kids involved w/shopping and to be looking for new ones

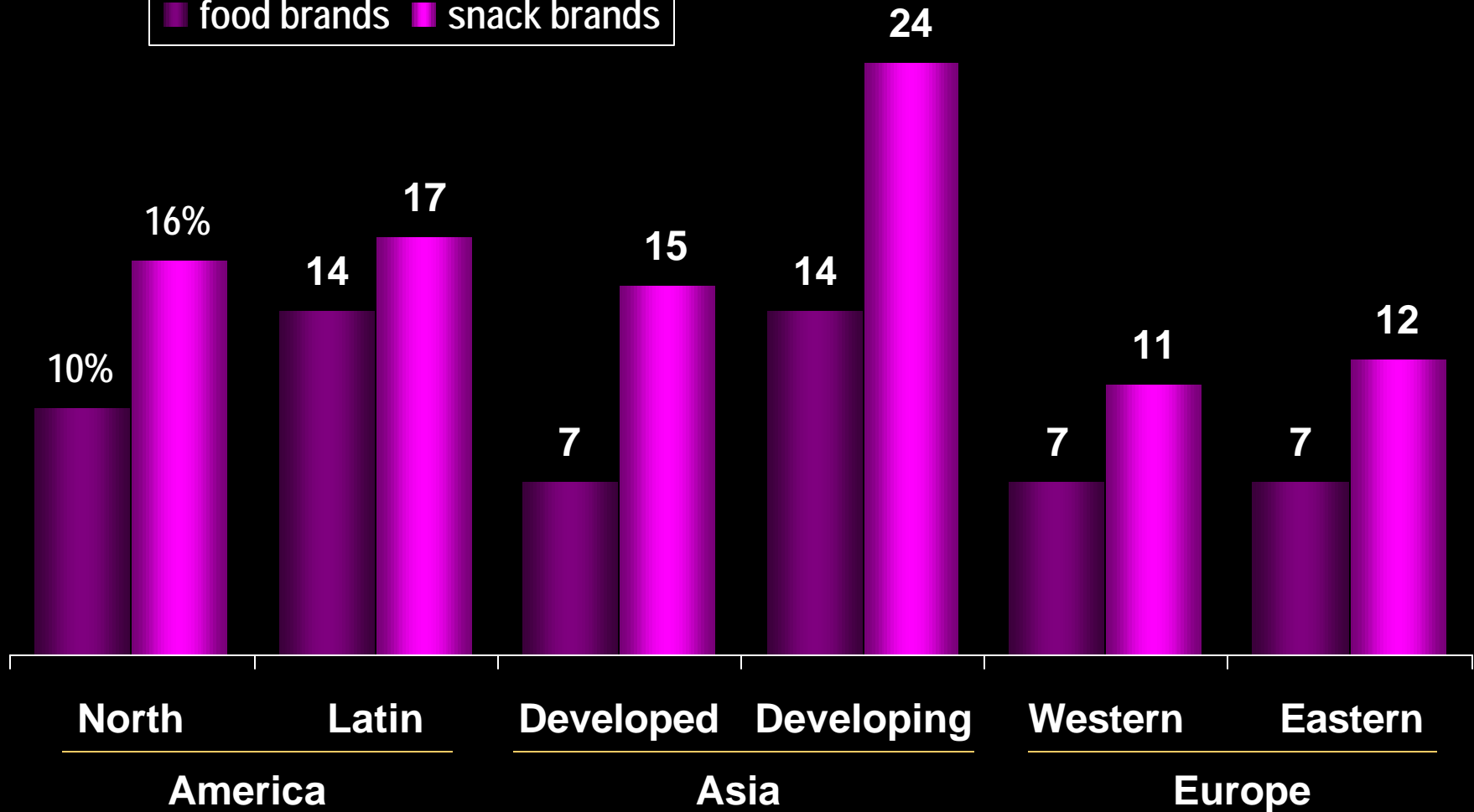
Consumers in Developing Asia Lead in Having Favorite Brands

- Over half of consumers in Developing Asia say they nearly always buy one favorite brand of foods and beverages
 - Contrasted with only 28% of consumers in Developed Asia who say this
- Latin Americans also strong in this regard, with nearly half saying they nearly always buy one favorite food/beverage brand
- Only around a third of consumers in other regions say this about brands of food and beverages
- Brand loyalty also tends to increase with age across regions

Developing Asia Also Looking Most for New Food and Snack Brands

% who are always looking for something new

■ food brands ■ snack brands



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Looking for New Products: Regional Overview

- **North Americans' propensity to always be looking for something new is lower than average in all categories**
- **Latin Americans higher than average in all (except snacks and beer, where they are average)**
- **Consumers in Developed Asia and Western Europe low in all categories except alcohol**

Looking for New Products: Regional Overview

- **Consumers in Developing Asia have high demand for new products all categories except alcohol**
 - Taiwan more closely resembles Developing Asia, while the Philippines resembles Developed Asia
- **Eastern Europeans about average in looking for something new for most food/beverage categories**



Which Countries Make the Best Products?

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Product Preferences: Overview

- For everyday items, consumers around the world most often think their country or region makes the best products, including food categories, although there are exceptions across the board
- Teens and younger consumers are more likely to feel imported products, particularly in areas such as carbonated soft drinks or television programs, are better than local makes

Product Preferences: Overview

- For aspirational items, imports are more likely to have a better image than local products
- Some countries/products are inextricably linked with the category “best” in the minds of consumers globally -- e.g. the United States with blue jeans and athletic shoes, France with wine and perfume, Japan with consumer electronics

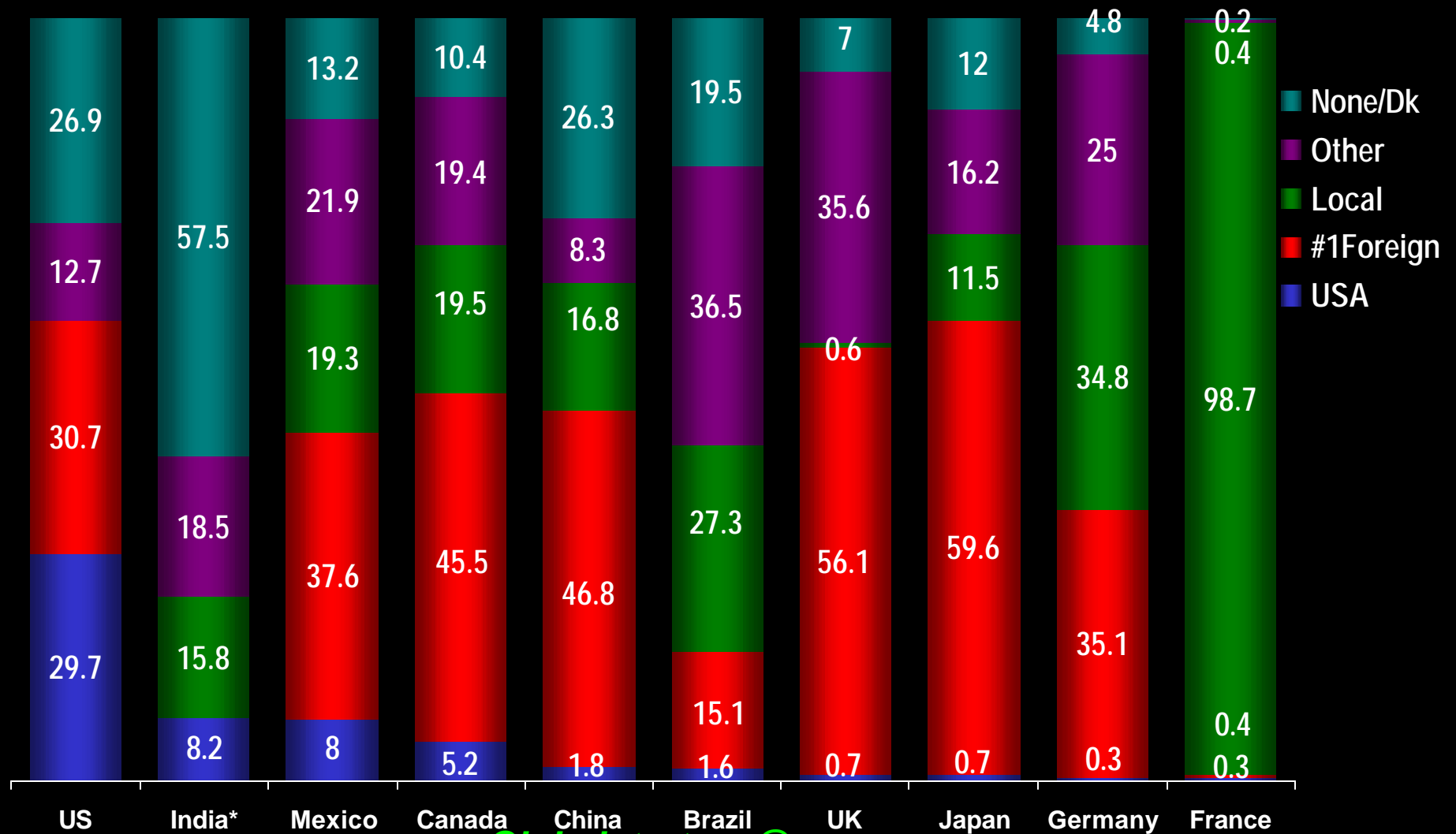
Who Makes the Best Beer?

* = Countries with USA as #1 Foreign Choice



Who Makes the Best Wine?

* = Countries with USA as #1 Foreign Choice

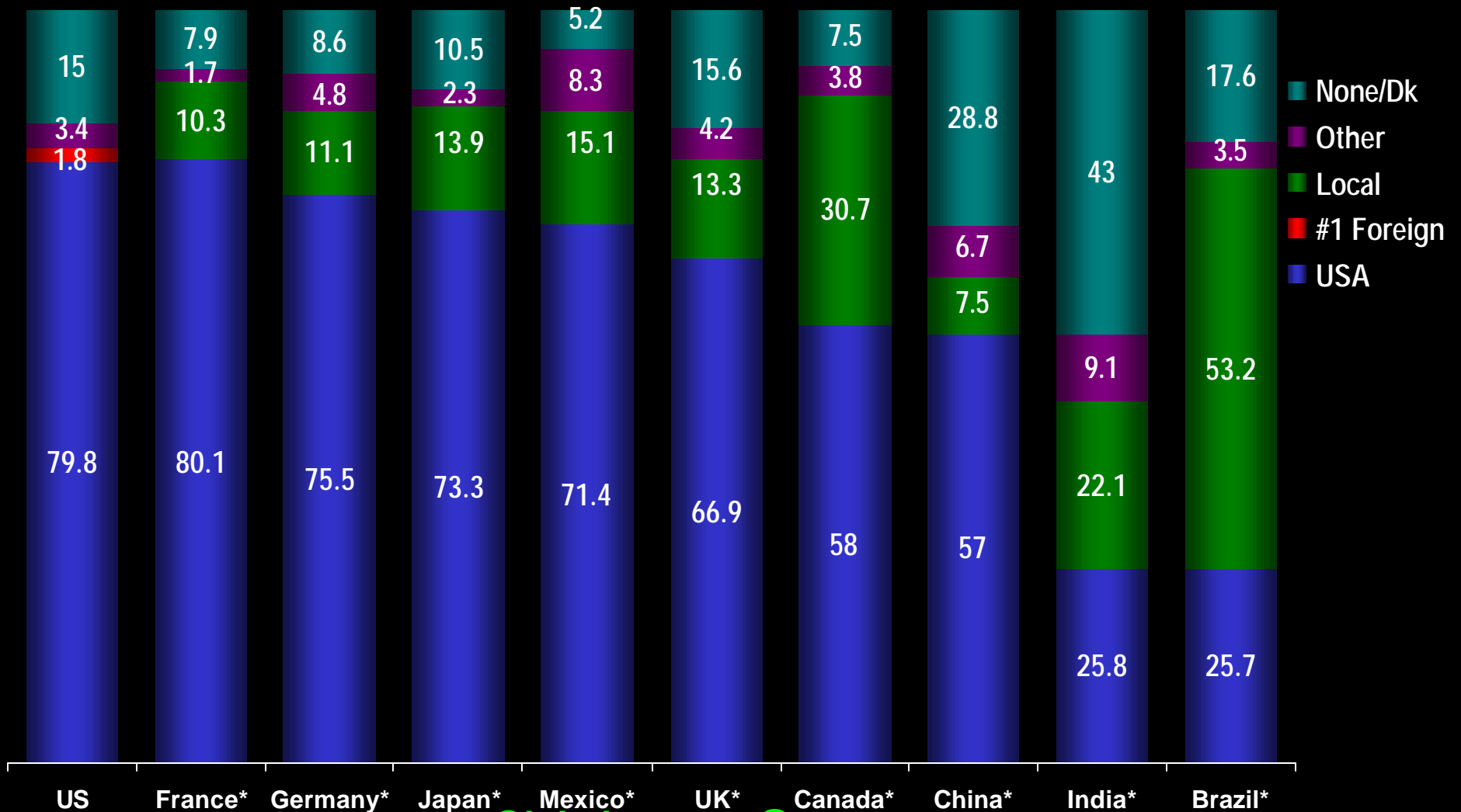


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Who Makes the Best Blue Jeans?

USA is #1 Foreign Choice for all Countries (excl. USA)



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Food Preferences and Eating

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- Food preferences globally are mainly driven by culture, nationality, and tradition
- Fresh fruits are the most uniformly consumed food across nationalities and cultures
- Choice of starch--potatoes versus rice--the most important delineator between US and European menus versus Asian and Latin American menus
- Most balanced diets in Western Europe, with equal division among major main course items (poultry, beef, pork, fish)

Daily Menu in the US

Foods Eaten in Past 24 Hours

Most Popular Main Courses

- Chicken or turkey (42%)
- Hamburger/ground beef (34%)
- Beef Steaks/roasts (18%)

Most Popular Sweets/Desserts

- Fruits (43%)
- Chewing gum (20%)
- Candy (18%)

Most Popular Side Dishes

- Fresh vegetables (44%)
- Potatoes (42%)
- Green salad (38%)

Other Popular Foods

- Bread (64%)
- Cold Cereal (40%)
- Cheese (30%)

Most Popular Main Courses

- Vegetarian main Dish (54%)
- Fish (50%)
- Pork (39%)

Most Popular Sweets/Desserts

- Fruits (64%)
- Ice Cream (16%)
- Chocolate (16%)

Most Popular Side Dishes

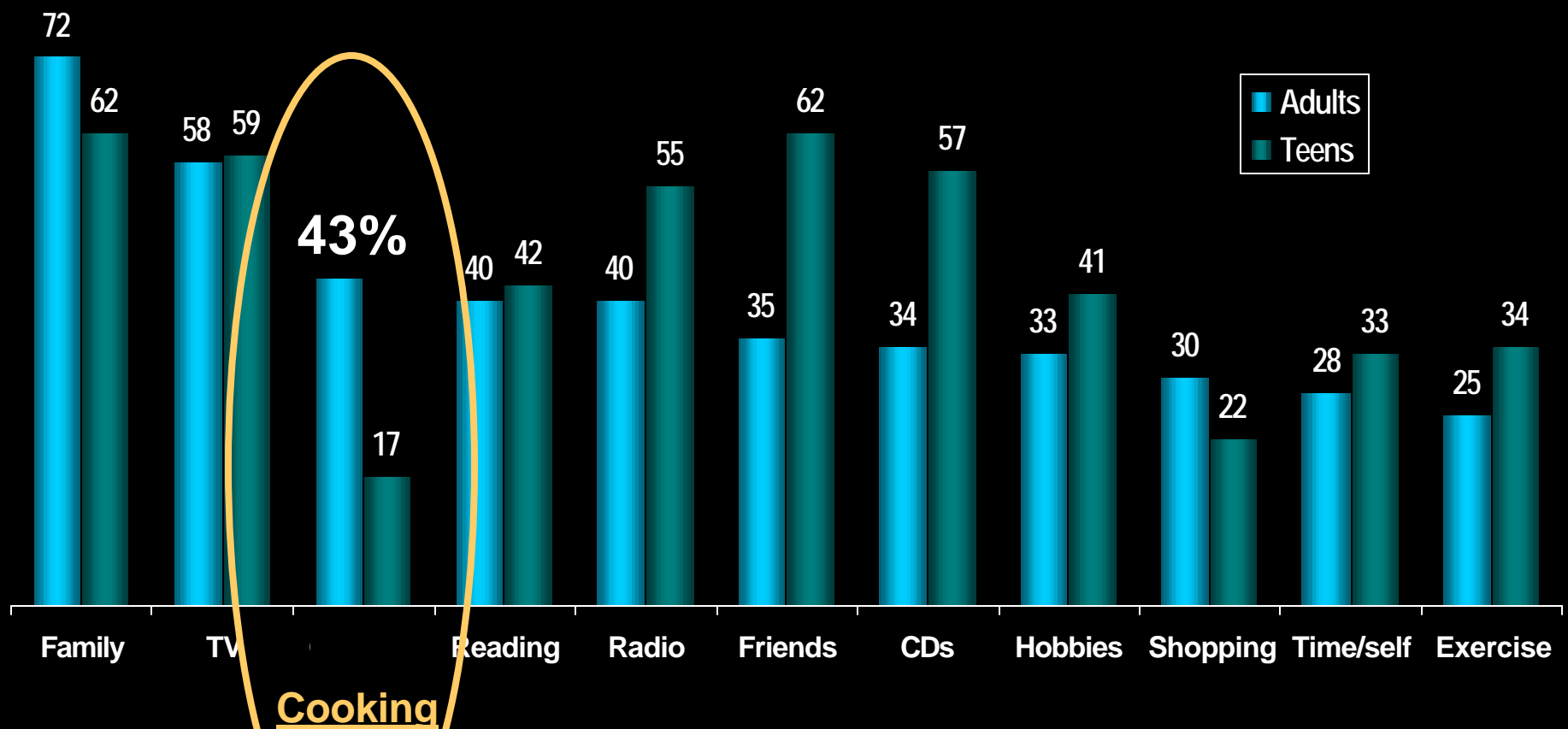
- Rice (89%)
- Fresh vegetables (78%)
- Potatoes (38%)

Other Popular Foods

- Eggs (54%)
- Bread (40%)
- Homemade Soup (36%)

Lots of Leisure Time Cooks Around The World

Percentage globally who often do in leisure time



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Roper Reports Worldwide 1997-1998 Wave

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Top-ranked countries where:

- I eat and drink what I want
 - Korea, India, Thailand
- I enjoy experimenting with new foods
 - Brazil, Saudi Arabia
- I'm not willing to give up taste to save on calories
 - Japan, Germany, Korea

- **3 in 4 Latin Americans, Developed Asians, and residents of the Russia/Eastern Europe wish they had healthier diets**
 - This desire may present a “hook” for marketers of processed foods, and other kinds of food/agricultural products in these regions
- **Over half of respondents in *ALL* markets indicate they try to eat balanced diets**
 - As food choices have increased, so has the awareness that choice in diet impacts health and well being
 - Positioning your product as “part of a balanced diet” may be an important point of differentiation, depending upon your category, and the target market

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Putting It All Together

What Drives the Global Consumer?

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What Drives Global Consumers Overall?

- **Sometimes it's innermost beliefs:**
 - Food and eating have lots of values-driven attitudes attached to them and the food choices people make--e.g. alcohol, beef in India, pork in Muslim countries, vegetarian diets
- **Sometimes it's the roles people play:**
 - Women make most of the food purchases, and their role in the family is in turn shaped by cultural norms
- **Sometimes it's national/cultural traits:**
 - Thais who eat what they want without thinking, vs. Russians who are concerned about the amount of fat in their diet
- **But usually, it's a combination**

**And you still have to persuade
the primary shopper
(in most parts of the world, that's still Mom)
if you are marketing new grocery purchases**

In Sum: Branding and Marketing to The Complex Consumer

- **People play different roles in life**
 - **The same consumer can be a woman (who buys cosmetics), a mother (who buys food for the family), an athlete (who works out and is concerned about healthy eating), and a Brazilian (who watches soap operas)**
- **The key is to understand what makes someone tick in any given situation on a particular issue, and talk to the person they are at that moment in time**

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