Changing Consumer Dynamics & Demographics

Presented by Kate Weigle
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Overview

What you’ll see this morning:

- Household demographics are shifting
- Stereotypical roles within the household may not apply
- Values continue to play a prominent role
- Values are shared
- Consumers are engaging in a variety of ways
- There are clear expectations of industry
- All of this is reflected in purchasing behaviors
Household Demographics Are Evolving

Fact
Minorities make up one-half of the children born in the U.S.

Fact

Fact
35% of children in the U.S. today are raised in single-parent households; more prominent among minorities.

Fact
There are more than half a million same-sex couple households in the U.S.

Sources: US Census Bureau, National KIDS COUNT Program, Centers for Disease Control and Prevention
33% of dads say they take on the role of a “traditional mom”

The majority of dads indicate they have some responsibility for a number of areas that used to traditionally be mom’s domain:
- 83% take care of children
- 70% clean the house
- 64% do laundry

82% of new dads (oldest child under 2 years old) believe there is an “anti-dad” societal bias

# Values Within The Household Are Shared

## Food Values

<table>
<thead>
<tr>
<th>Statement</th>
<th>Somewhat agree</th>
<th>Strongly agree</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>The foods I eat make a statement about my personal values</td>
<td>42%</td>
<td>23%</td>
<td>65%</td>
</tr>
<tr>
<td>I try to purchase foods that are raised or grown locally</td>
<td>46%</td>
<td>24%</td>
<td>70%</td>
</tr>
<tr>
<td>It is important that I know the meat I buy has been humanely raised</td>
<td>34%</td>
<td>30%</td>
<td>64%</td>
</tr>
<tr>
<td>When buying brand name products, that company’s values and community initiatives are important to me</td>
<td>46%</td>
<td>17%</td>
<td>63%</td>
</tr>
</tbody>
</table>

**Food Purchasing Habits**

When purchasing foods, I think about the nutrients my meals provide my family

- Somewhat agree: 38%, Strongly agree: 57%
  - Total: 95%

I usually cook meals with fresh ingredients

- Somewhat agree: 48%, Strongly agree: 42%
  - Total: 90%

I try to limit the amount of processed foods my family eats

- Somewhat agree: 44%, Strongly agree: 42%
  - Total: 86%

It is important that I know where the food I buy comes from

- Somewhat agree: 47%, Strongly agree: 30%
  - Total: 77%

- Somewhat agree: 48%, Strongly agree: 31%
  - Total: 79%

## Moms and Dads Are Both Food Engaged

<table>
<thead>
<tr>
<th>Activity</th>
<th>Moms</th>
<th>Dads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watch cooking channels</td>
<td>67%</td>
<td>62%</td>
</tr>
<tr>
<td>Visit farmer’s markets</td>
<td>75%</td>
<td>71%</td>
</tr>
<tr>
<td>Host dinner partiers</td>
<td>52%</td>
<td>46%</td>
</tr>
<tr>
<td>Tend a vegetable garden</td>
<td>43%</td>
<td>40%</td>
</tr>
</tbody>
</table>

While Mom Is More Active, Dad’s There As Well

- Read food magazines: 59%
- Find recipes on Pinterest: 45%
- Use cooking apps: 37%
- Read food blogs: 35%
- Follow food brands on social media: 25%
- Post meal pictures on social media: 21%
- Follow food personalities on social media: 17%
- 27% of Dad's involvement.

What Do Consumers Expect From Industry?

83% say it’s important that food and beverage companies provide healthy foods that taste great

82% say it’s important that companies offer “healthy choices that fit my budget”

75% say it’s important for food and beverage companies to change products to make them healthier

68% believe healthy foods are too expensive

67% say it’s important for food and beverage companies to help solve community nutrition problems such as obesity and hunger

Source: Edelman Field to Fork Study, 2012
Taste, Cost and Convenience Are Important – But Other Factors Are At Play

Thinking about your purchase decision when buying food and beverages, which of the following factors are most likely to impact your decision to purchase certain products?

- 79% say their budget determines many of their food purchasing decisions.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>taste</td>
<td>56%</td>
</tr>
<tr>
<td>freshness/expiration date</td>
<td>41%</td>
</tr>
<tr>
<td>health and wellness</td>
<td>34%</td>
</tr>
<tr>
<td>nutrition facts panel</td>
<td>22%</td>
</tr>
<tr>
<td>front-of-pack label</td>
<td>19%</td>
</tr>
<tr>
<td>convenience</td>
<td>18%</td>
</tr>
<tr>
<td>package size</td>
<td>16%</td>
</tr>
<tr>
<td>brand name</td>
<td>15%</td>
</tr>
<tr>
<td>food safety testing</td>
<td>14%</td>
</tr>
<tr>
<td>organic</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: Edelman Field to Fork Study, 2012
There is a New Purchase Decision Equation

My Purchasing Decision

Taste + Convenience + Affordability × My Values

Health
Sustainable Practices
Social Good
Information
Implications

- **Changing demographics** will force customization; no “one size fits all”
- Dad’s increased household responsibility means he is a **key player**
- Moms and dads aren’t as different as we once thought; they **share values** when it comes to food
- Perceptions and behaviors are more **value-driven** than ever, and those values are a part of the purchasing decision
- **Engagement** needs to happen almost everywhere
- **Expectations** are clear, and actions either need to align with or address them
For more information, or for the complete studies contained herein, please contact:

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