

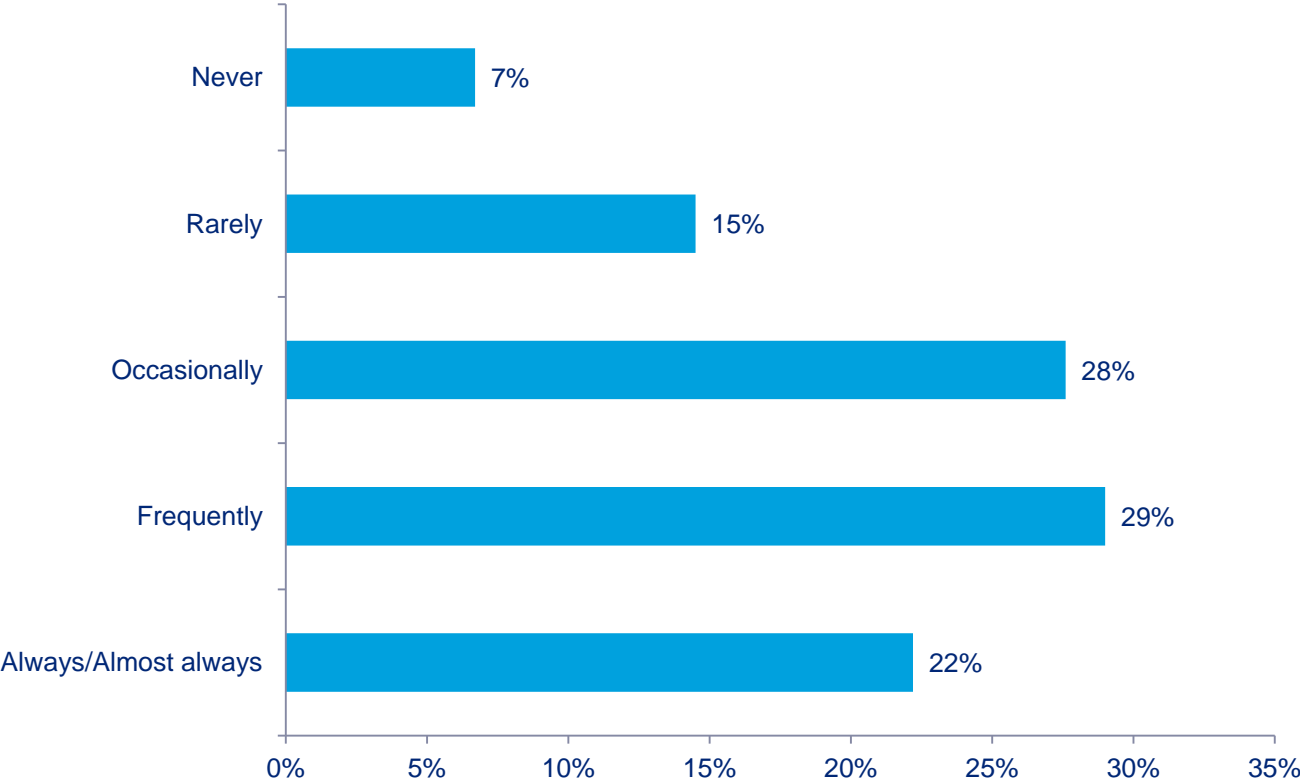
# 2011 Consumer Food and Product Insight Survey Part Two

**July 2011**

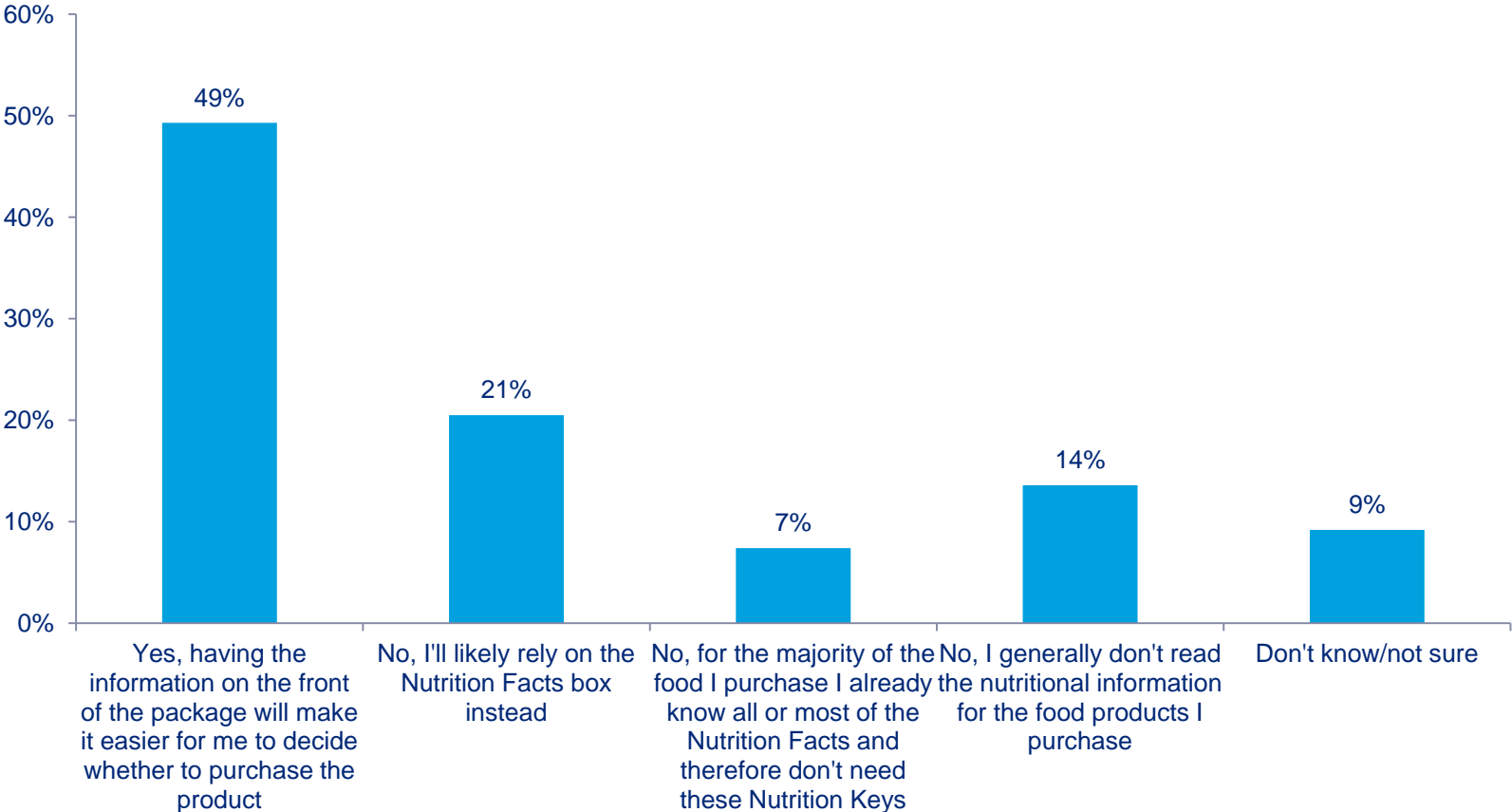


# Nutrition and product labeling

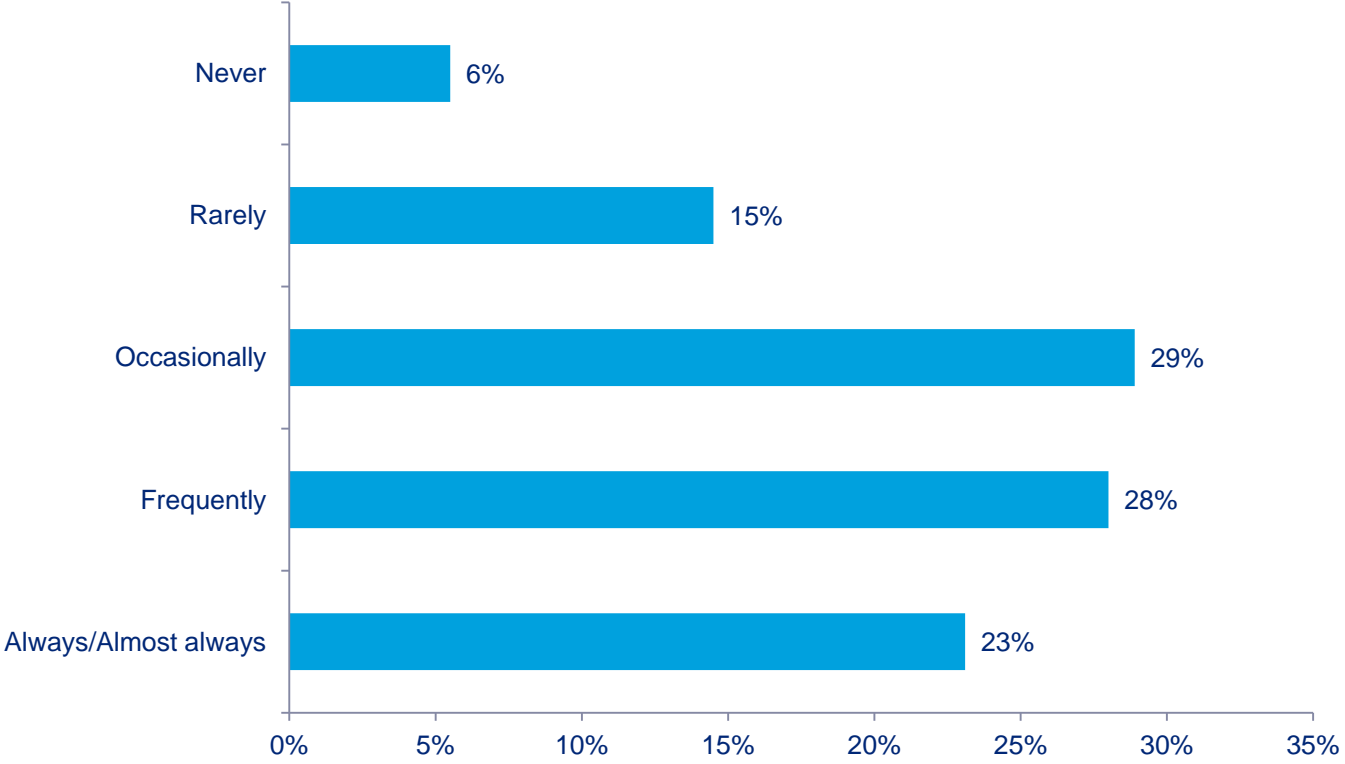
# How frequently do you read any part of the "Nutrition Facts" box (which shows calories, fat, etc.) on an unfamiliar packaged or bottled food item?



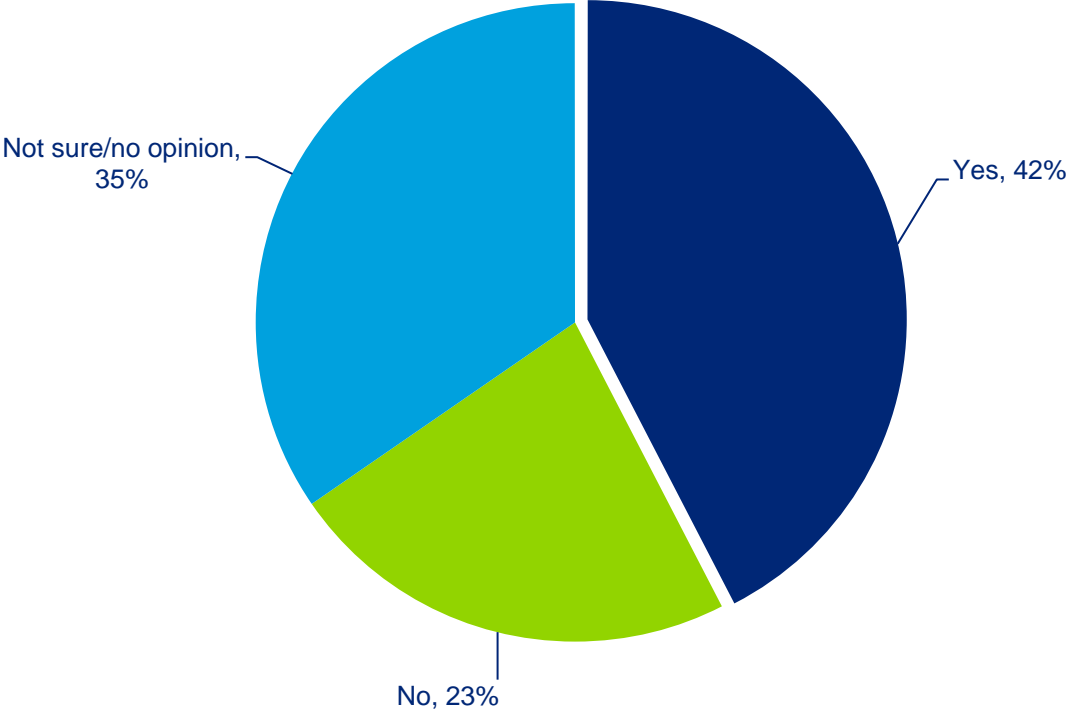
# Do you think these front-of-package Nutrition Keys will help you make more informed food purchase decisions?



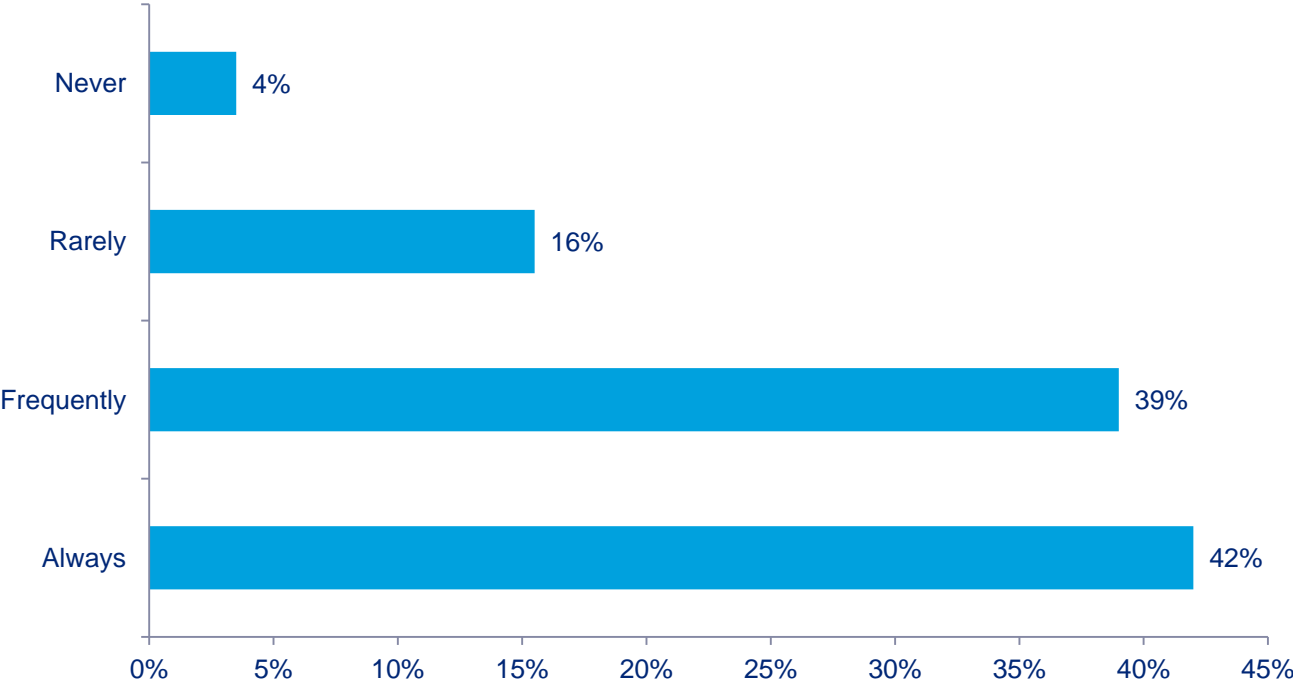
# How frequently do you read the list of "Ingredients" on an unfamiliar packaged or bottled food item?



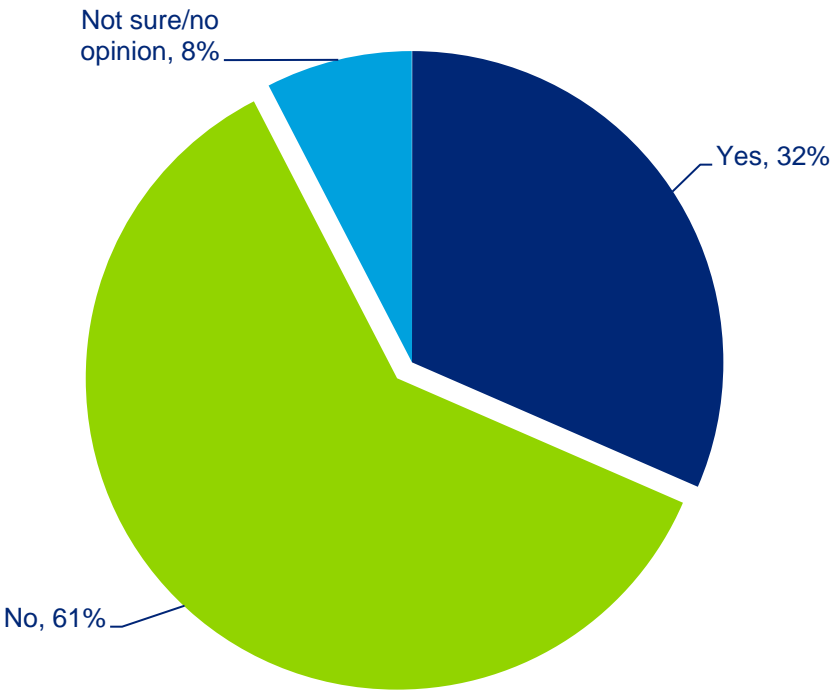
# Would you like to be able to go to a Website to find out the country of origin for all ingredients in a packaged/bottled food product?



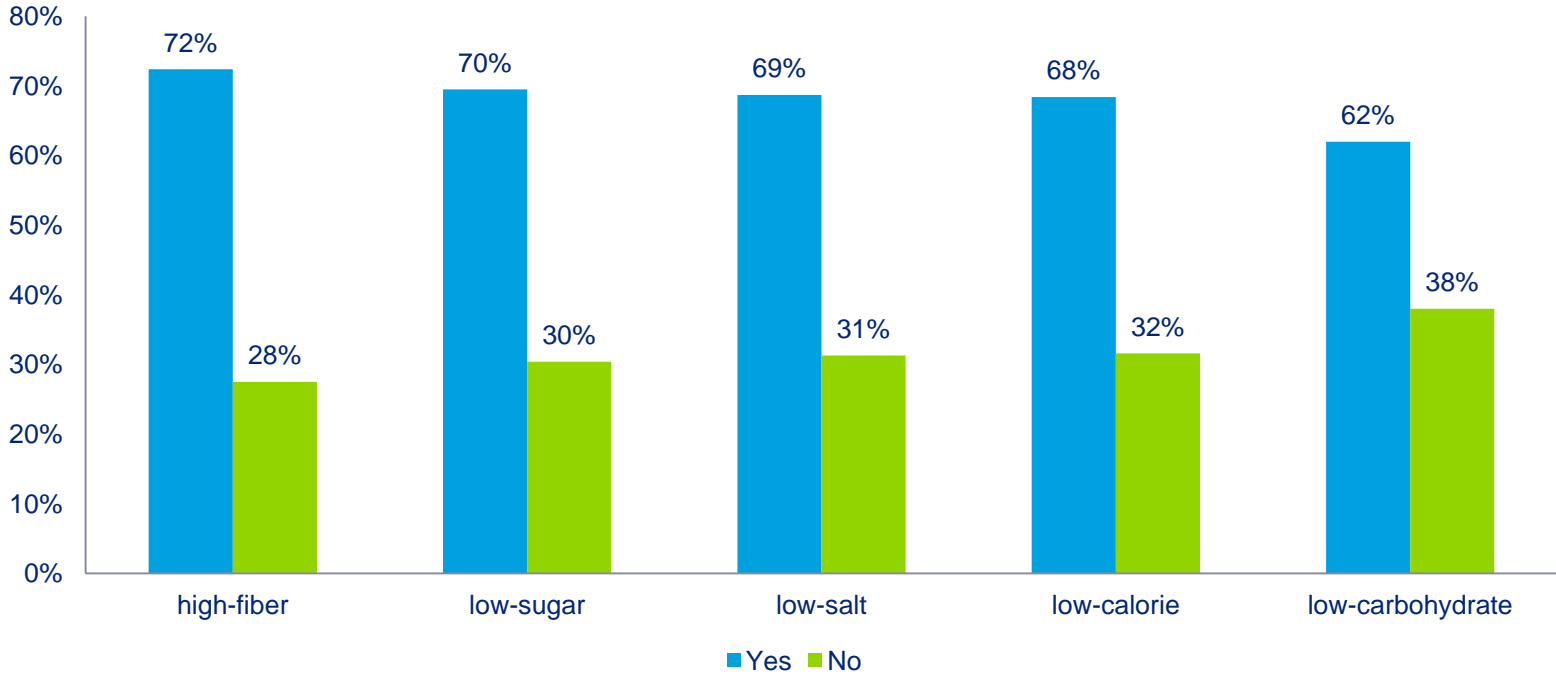
# How often do you check the expiration dates on packaged/bottled foods before you purchase them in the store?



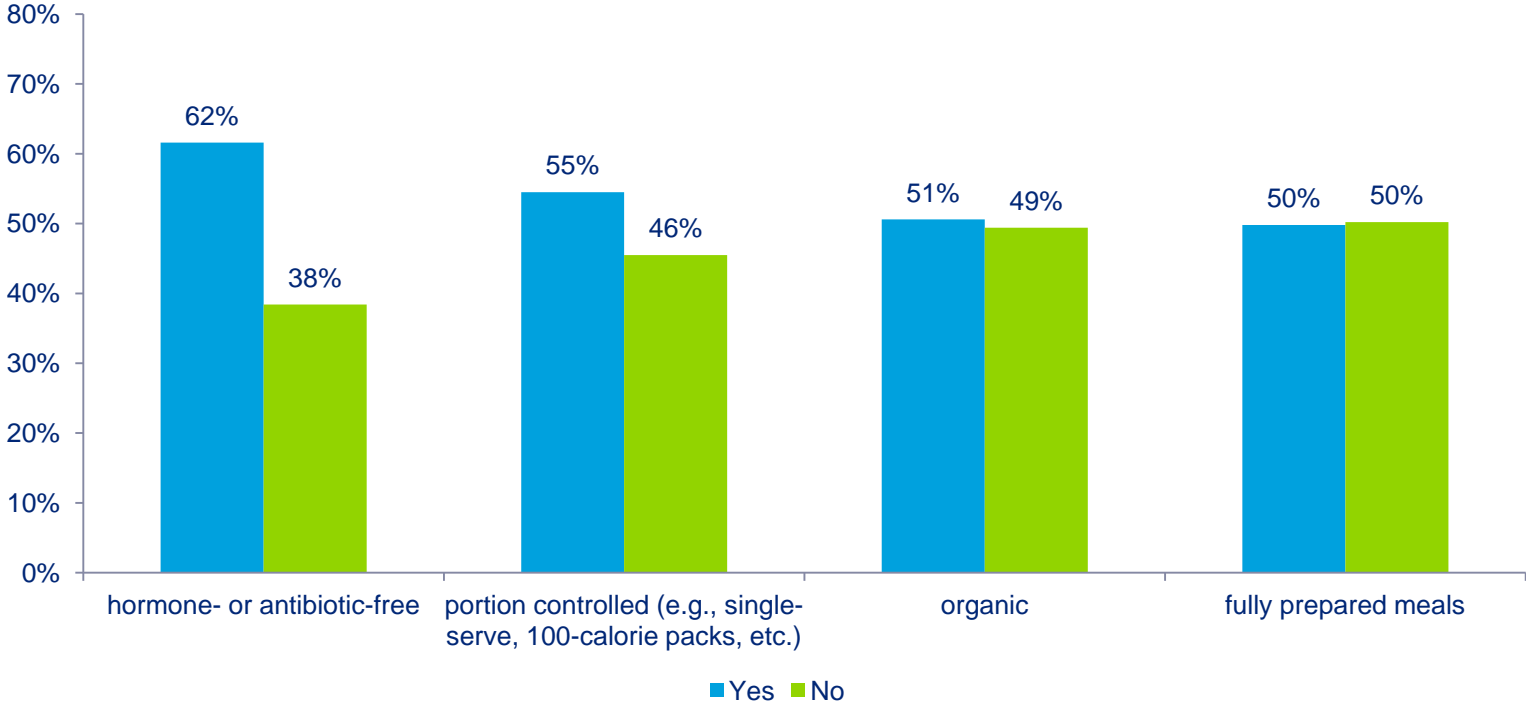
# Do you find the different product freshness indicators such as "use by" or "sell by" on packaged/bottled food products to be confusing?



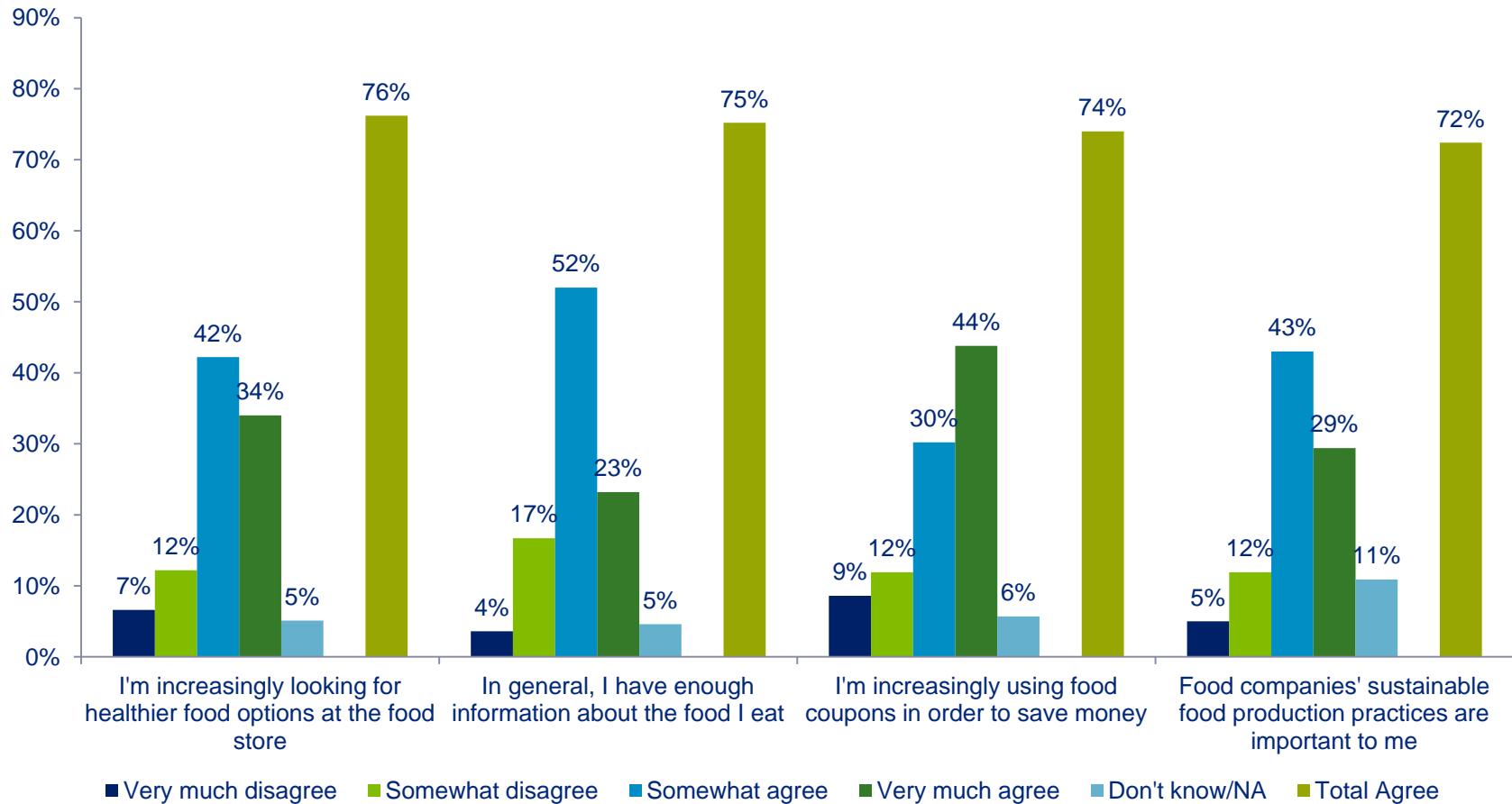
# Would you like to see more food products available for sale that are



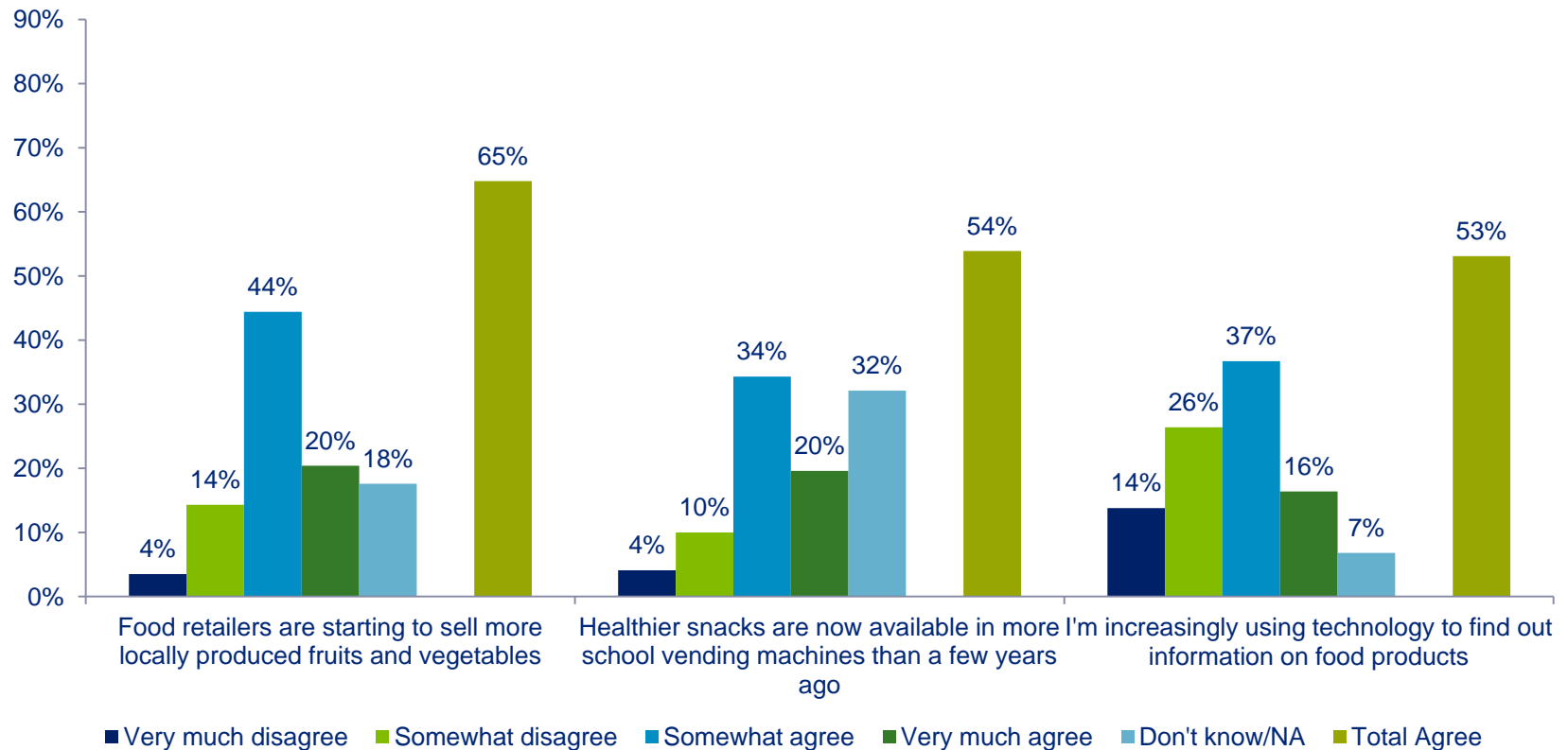
# Would you like to see more food products available for sale that are (continued)



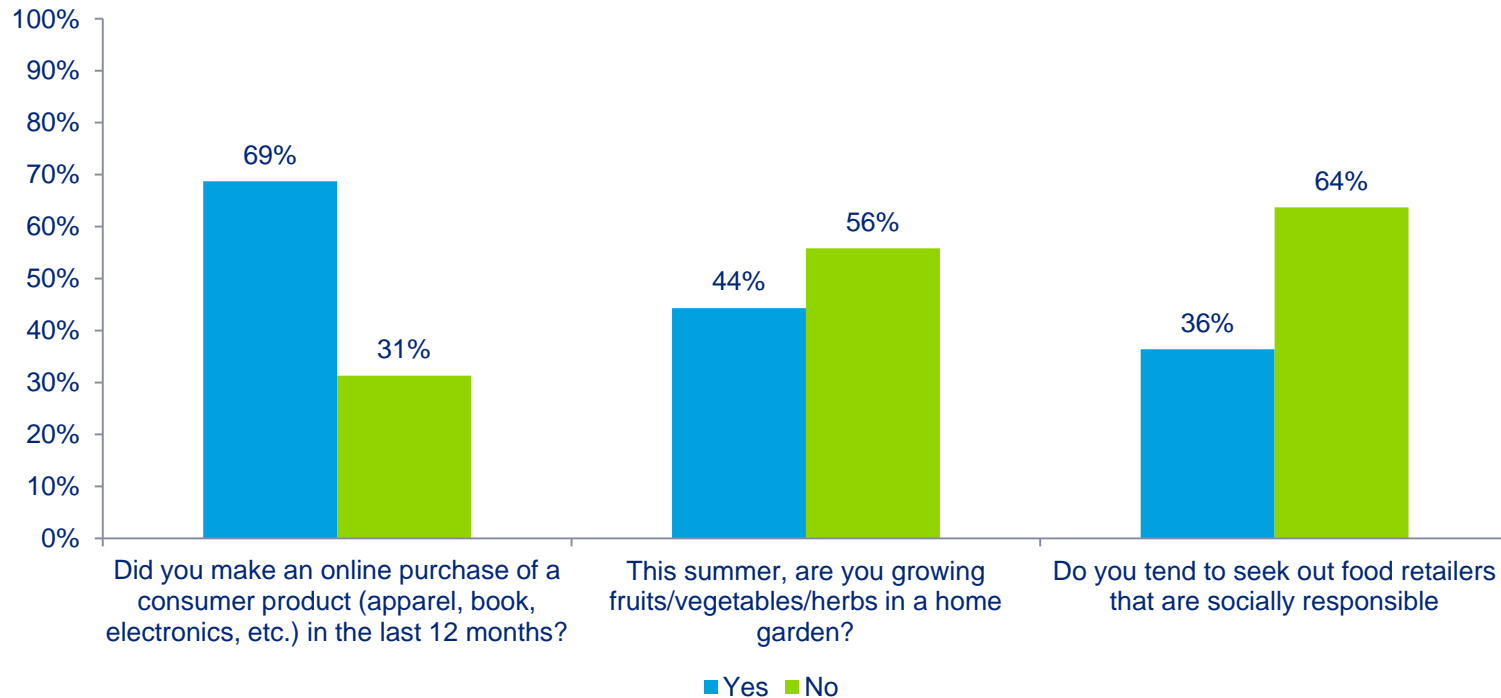
## How much do you agree or disagree with each of the following statements? (check one for each)



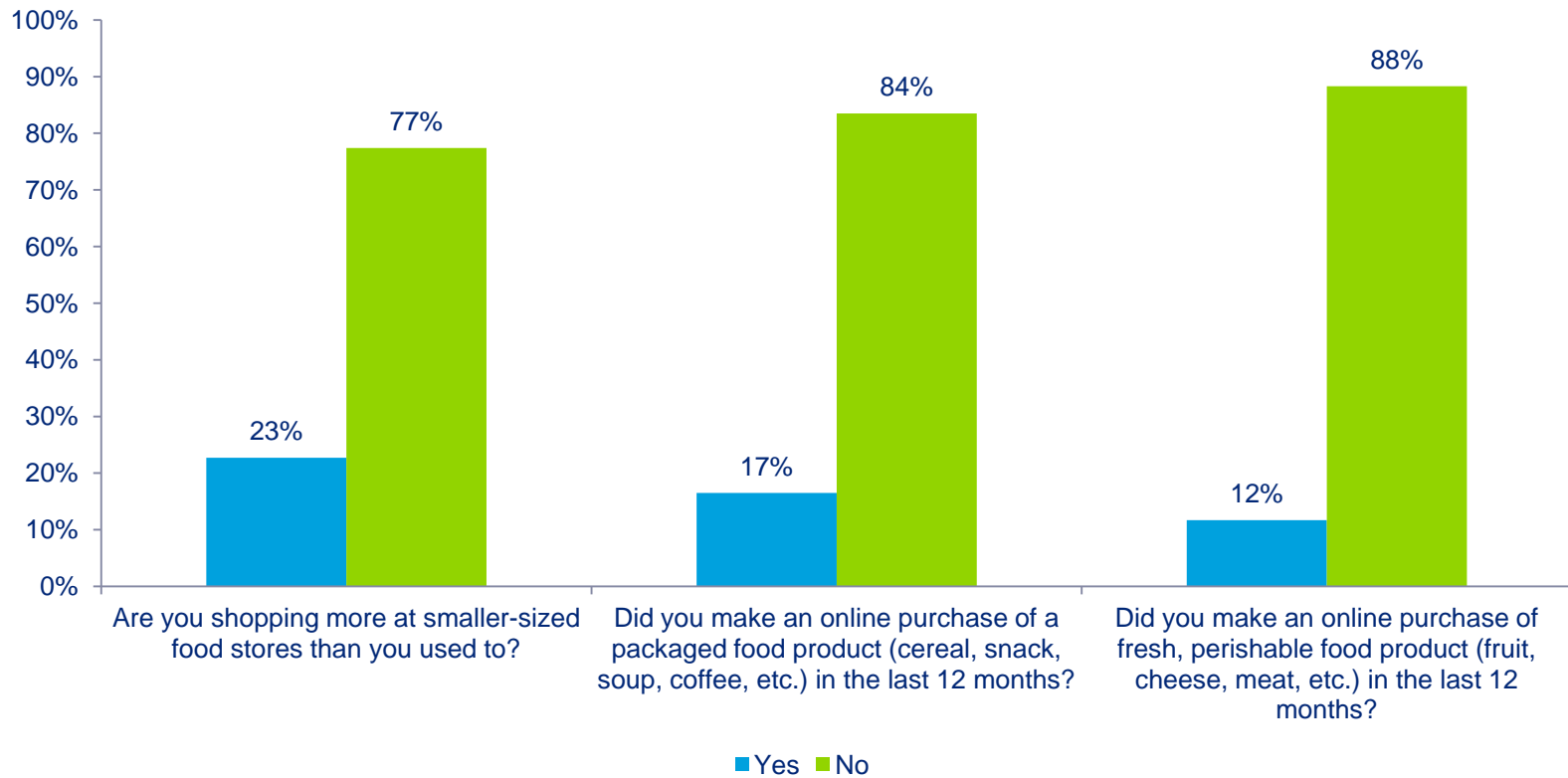
## How much do you agree or disagree with each of the following statements? (check one for each, continued)



Please answer yes or no to each of the following questions. (check one for each)

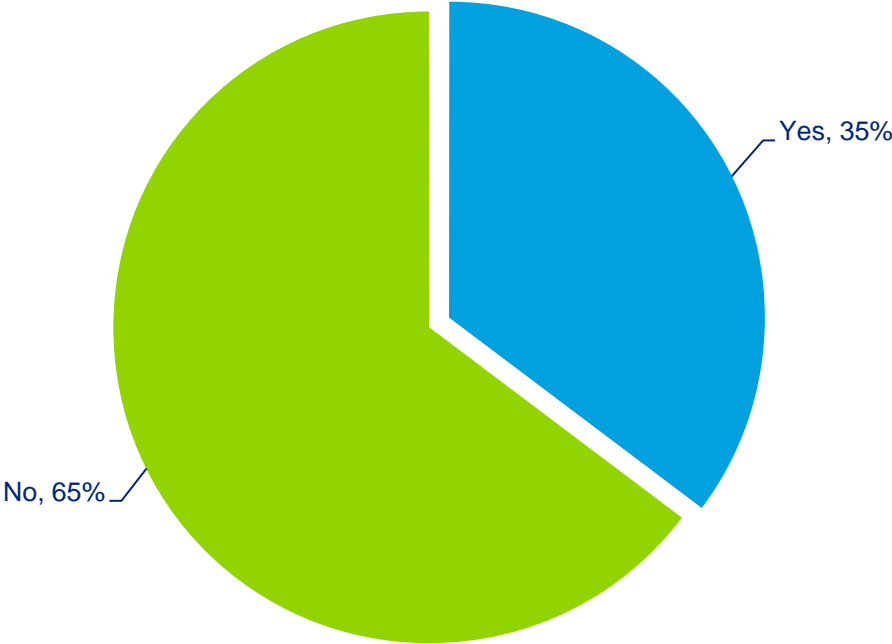


Please answer yes or no to each of the following questions. (check one for each, continued)

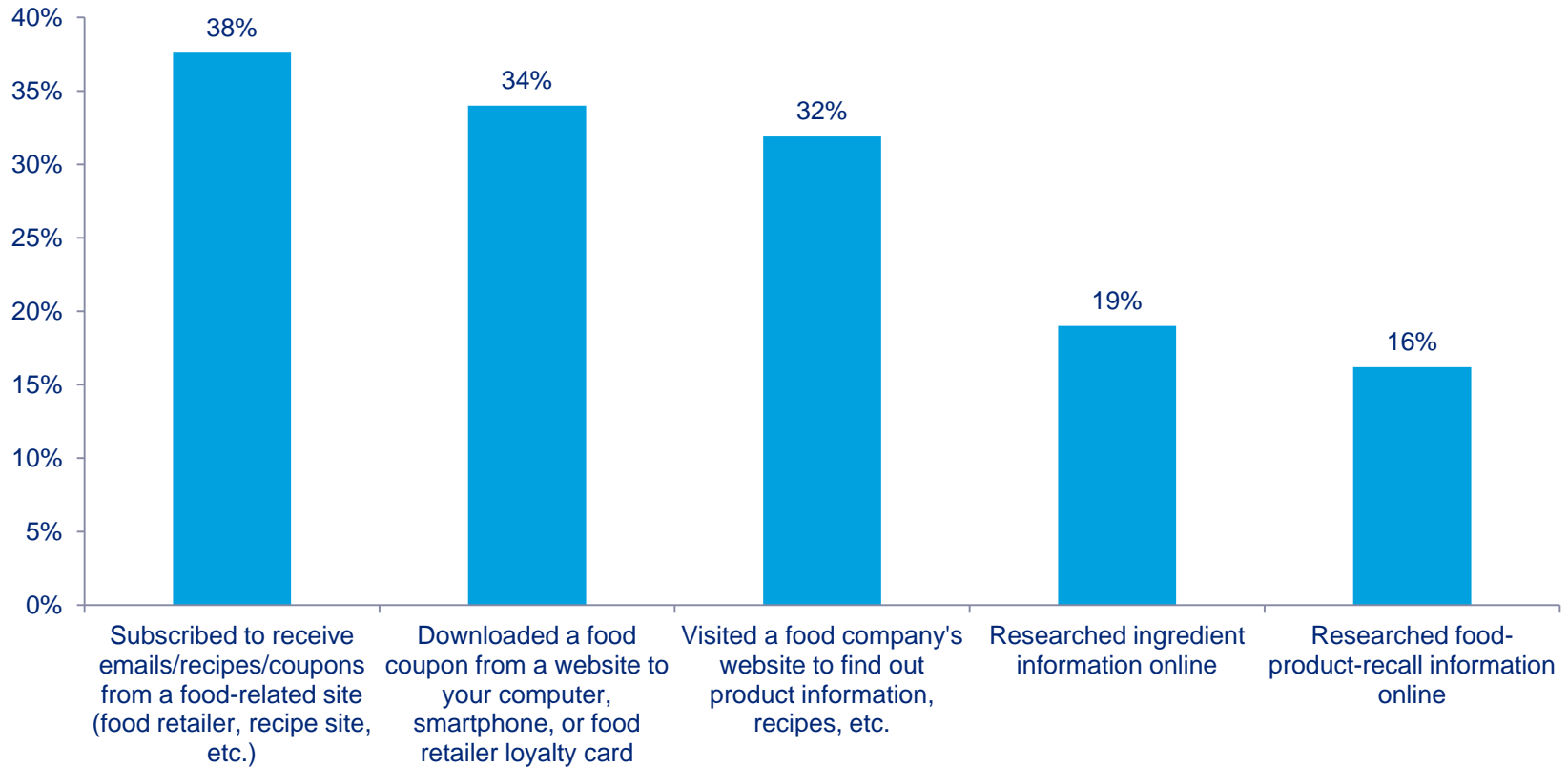


# The mobile shopper

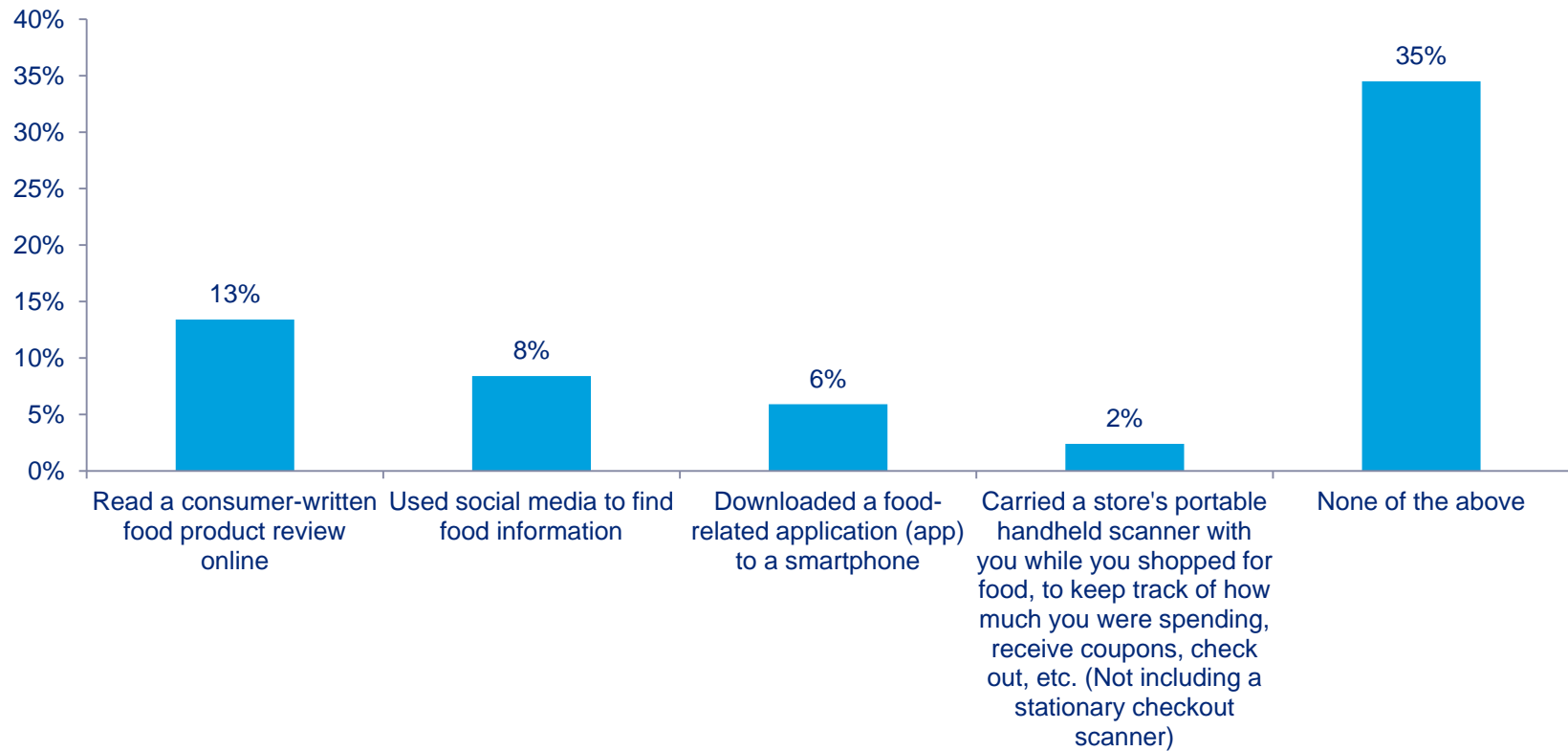
# Do you own a Smartphone or other web-enabled mobile device?



## Which of the following have you done? (check all that apply)



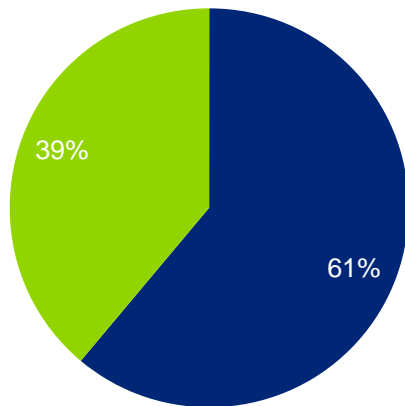
## Which of the following have you done? (check all that apply, continued)



# A majority of phone users are concerned about how their location information is used

## Security and Privacy of location information

Survey Question: Are you concerned about the security and privacy of your location information?

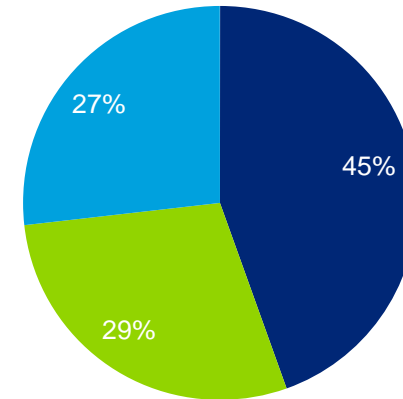


■ Yes ■ No

A majority (61%) of those who use smart phones or web-enabled mobile devices are concerned about the security and privacy of location information that is available for others to see and use.

## Default setting for location data in shopping apps

Survey Question: What is your default setting for location data in shopping apps?



■ Do not allow applications to use my location information  
■ Always allow applications to use my location information  
■ Don't know

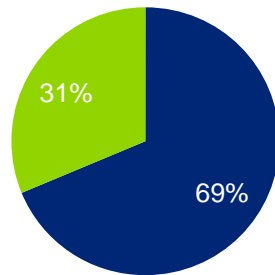
45% of those who use smart phones do not allow shopping apps to access location information. However, a significant number of (27%) consumers are not aware of the default setting on these apps.

Source: Deloitte 2011 Consumer Food and Product Insights Survey n=2000

# Consumers buy consumer products online more often than they buy packaged food, fresh and perishable products

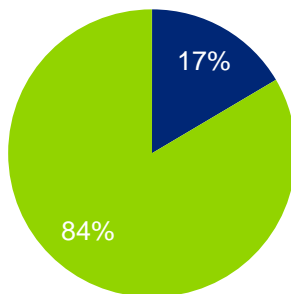
## Online purchase frequency

Survey Question: Did you make an online purchase of a consumer product in the last 12 months?



■ Yes ■ No

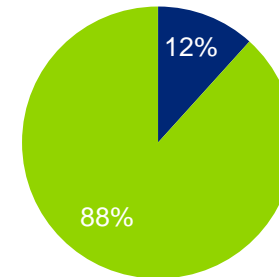
Survey Question: Did you make an online purchase of a packaged food product in the last 12 months?



■ Yes ■ No

## Online purchase frequency

Survey Question: Did you make an online purchase of a fresh, perishable food product in the last 12 months?



■ Yes ■ No

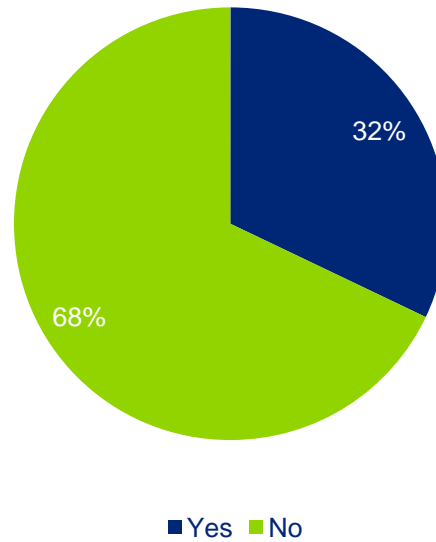
- 69% of the survey respondents have purchased a consumer product online in the last 12 months
- 17% of the survey respondents have purchased a packaged food product online in the last 12 months
- 12% of the survey respondents have purchased a fresh, perishable food product online in the last 12 months

Source: Deloitte 2011 Consumer Food and Product Insights Survey n=2000

# One in three consumers use their mobile phones to access coupons

## Use of mobile phones to access coupons and deals

Survey Question: Have you used your mobile phone to access /view social coupons or limited-time deals?



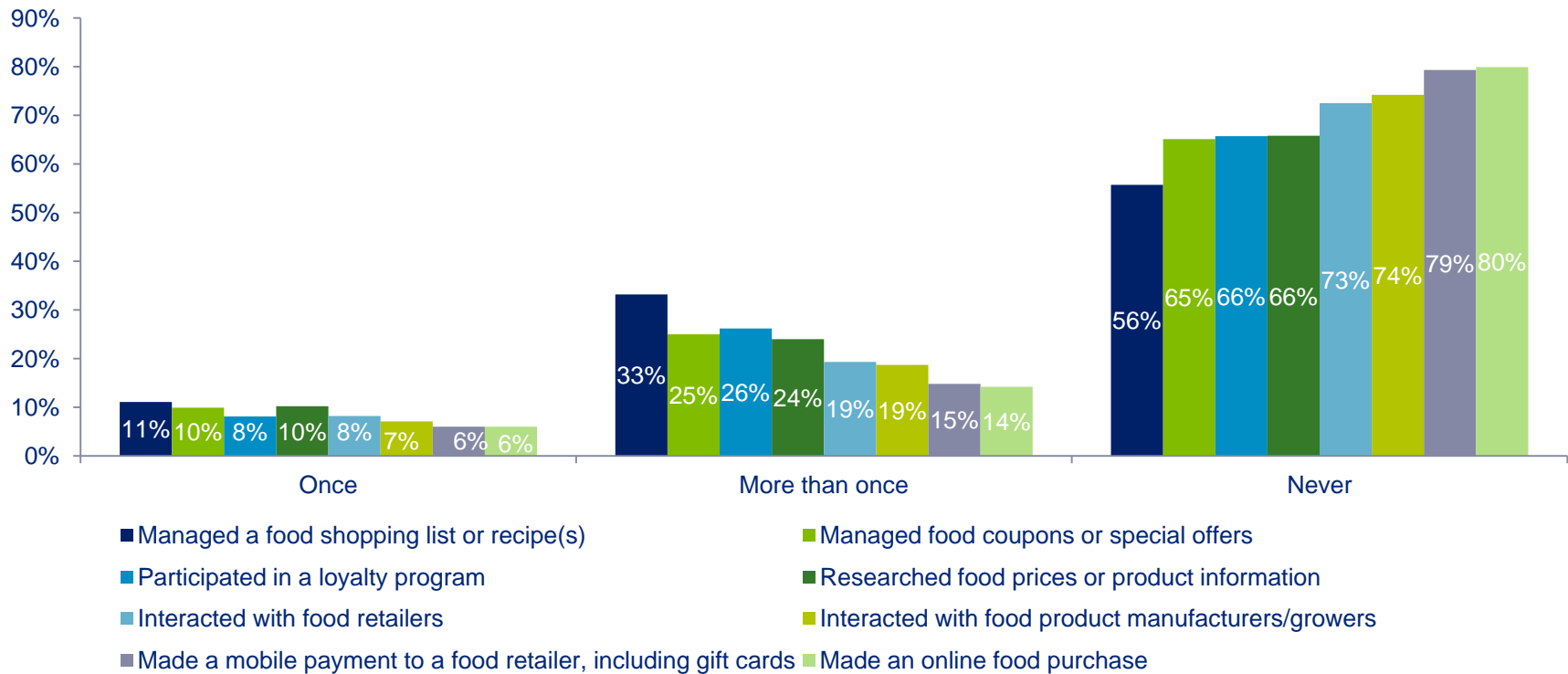
- 32% of the respondents used their mobile phones to access/view social coupons and limited-time deals

Source: Deloitte 2011 Consumer Food and Product Insights Survey n=2000

# One in three consumers have used their mobile phones at least once for grocery shopping related activities while in store

## Use of smartphones and web-enabled phones for grocery shopping related activities

Survey Question: While you were in store, how often have you used your smartphone or web-enabled mobile device for the following grocery shopping related activities?



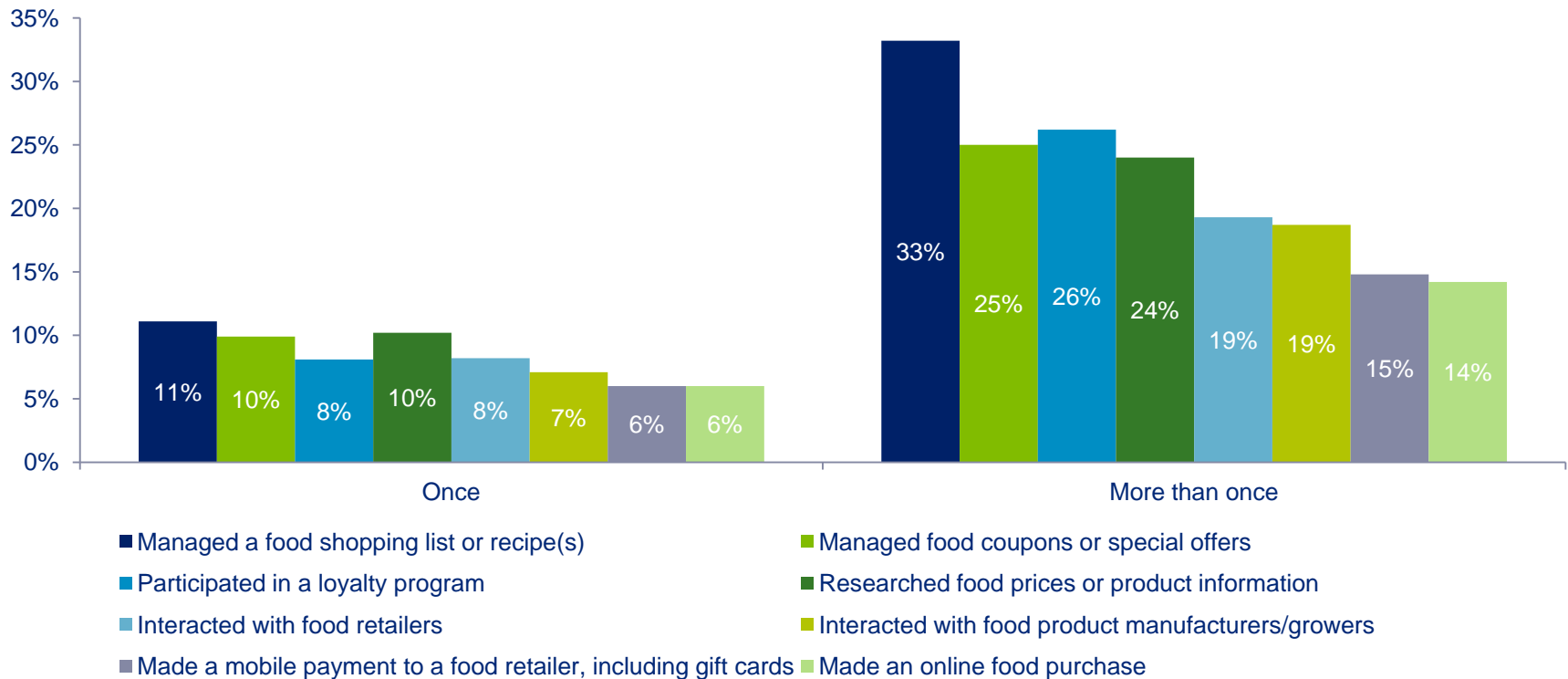
- Two in five shoppers used shopping lists and recipe management tools on their mobile phones while in store.
- Only one in five shoppers made an online purchase while in store

Source: Deloitte 2011 Consumer Food and Product Insights Survey , May 2011, n=705 (Respondents who own smartphones or web-enabled mobile devices)

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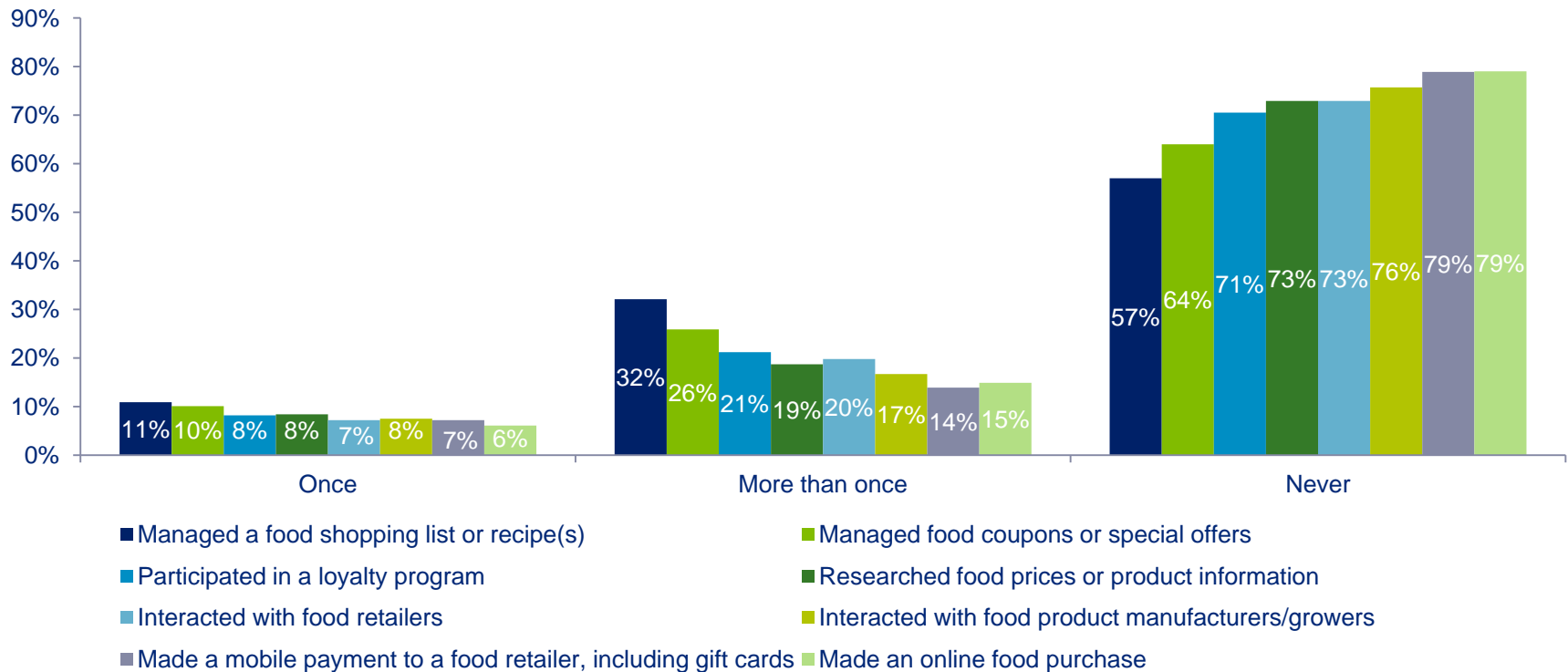
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# One in three consumers have used their mobile phones at least once for grocery shopping related activities while NOT in store

## Use of smartphones and web-enabled phones for grocery shopping related activities

Survey Question: While you were NOT in store, how often have you used your smartphone or web-enabled mobile device for the following grocery shopping related activities?



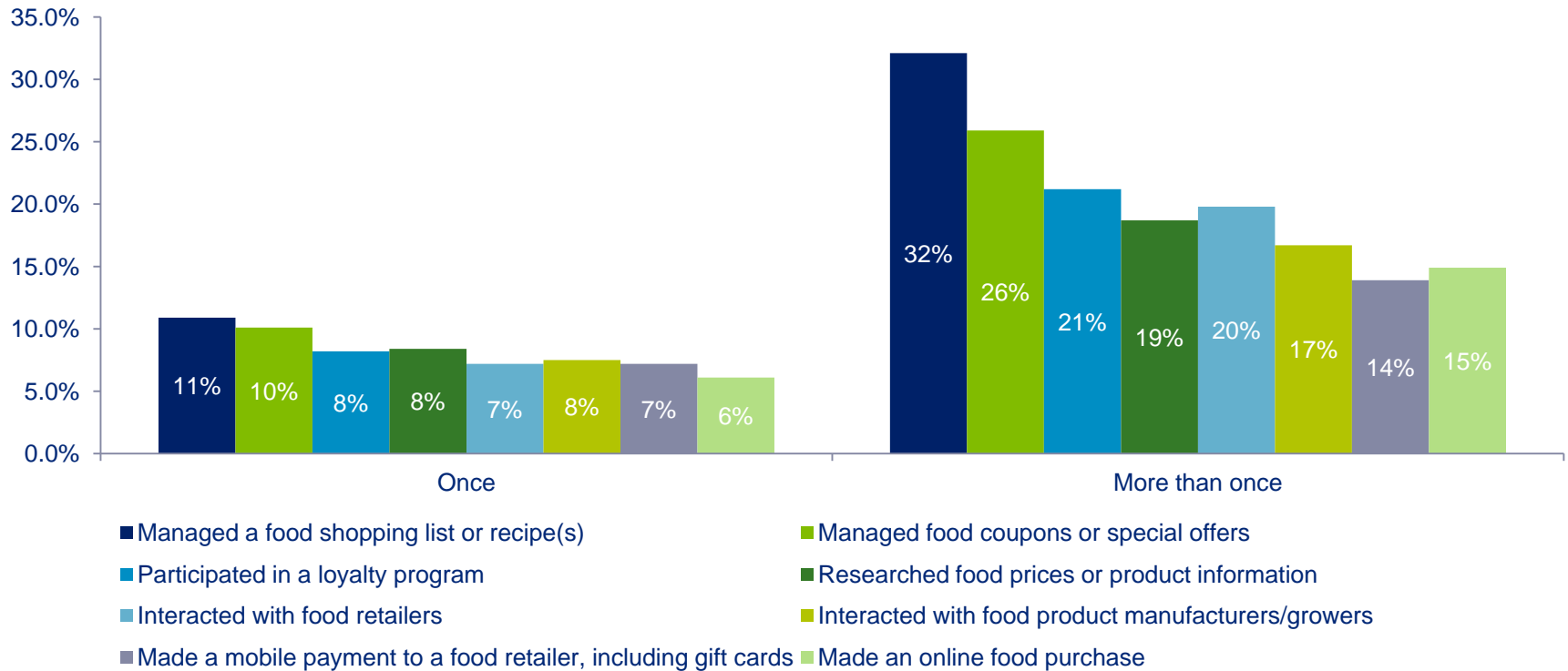
- Two in five shoppers used shopping lists and recipe management tools on their mobile phones while NOT in store.
- Only one in five shoppers made an online purchase while NOT in store

Source: Deloitte 2011 Consumer Food and Product Insights Survey , May 2011, n=705 (Respondents who own smartphones or web-enabled mobile devices)

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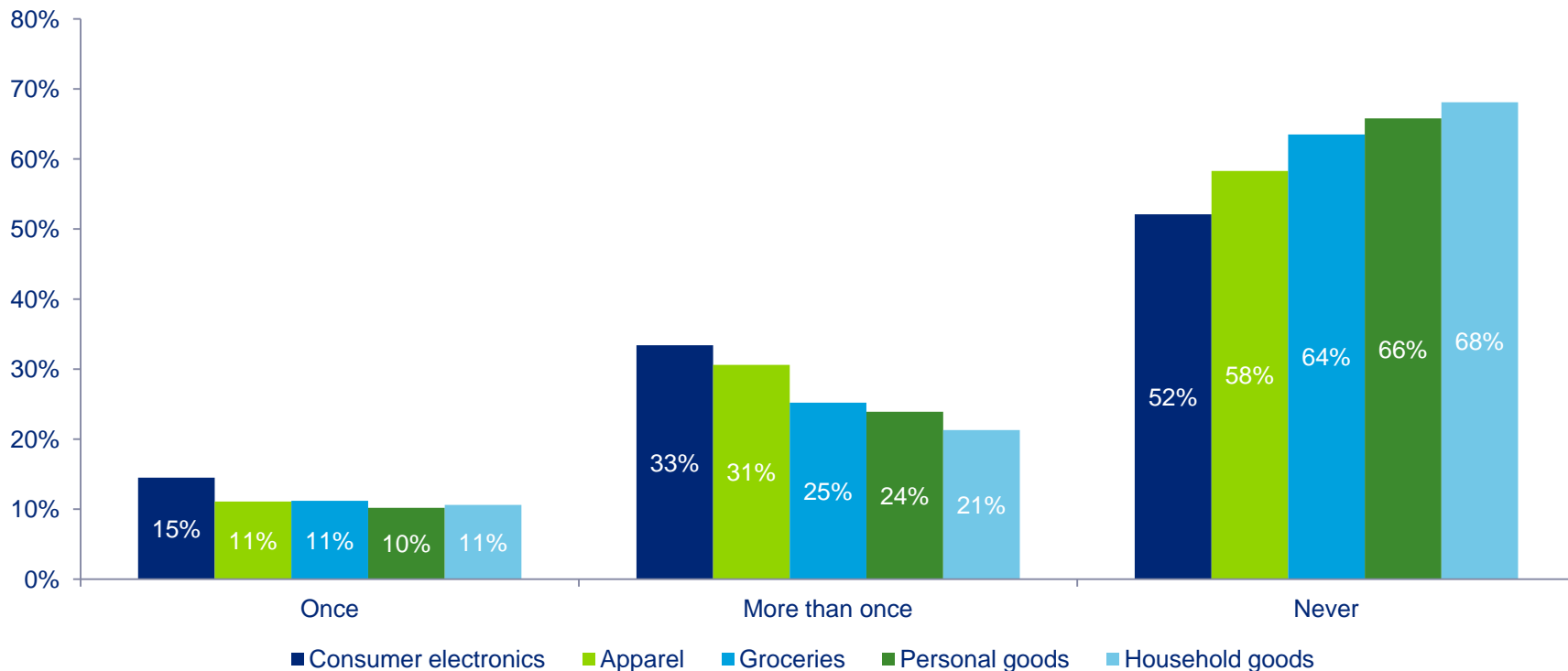
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# One in five respondents had used mobile devices to buy consumer products at least once

## Use of smartphones and web-enabled phones for shopping

Survey Question: In the past year, how often did you use your smartphone or web-enabled mobile device for any shopping-related activity for the following products?



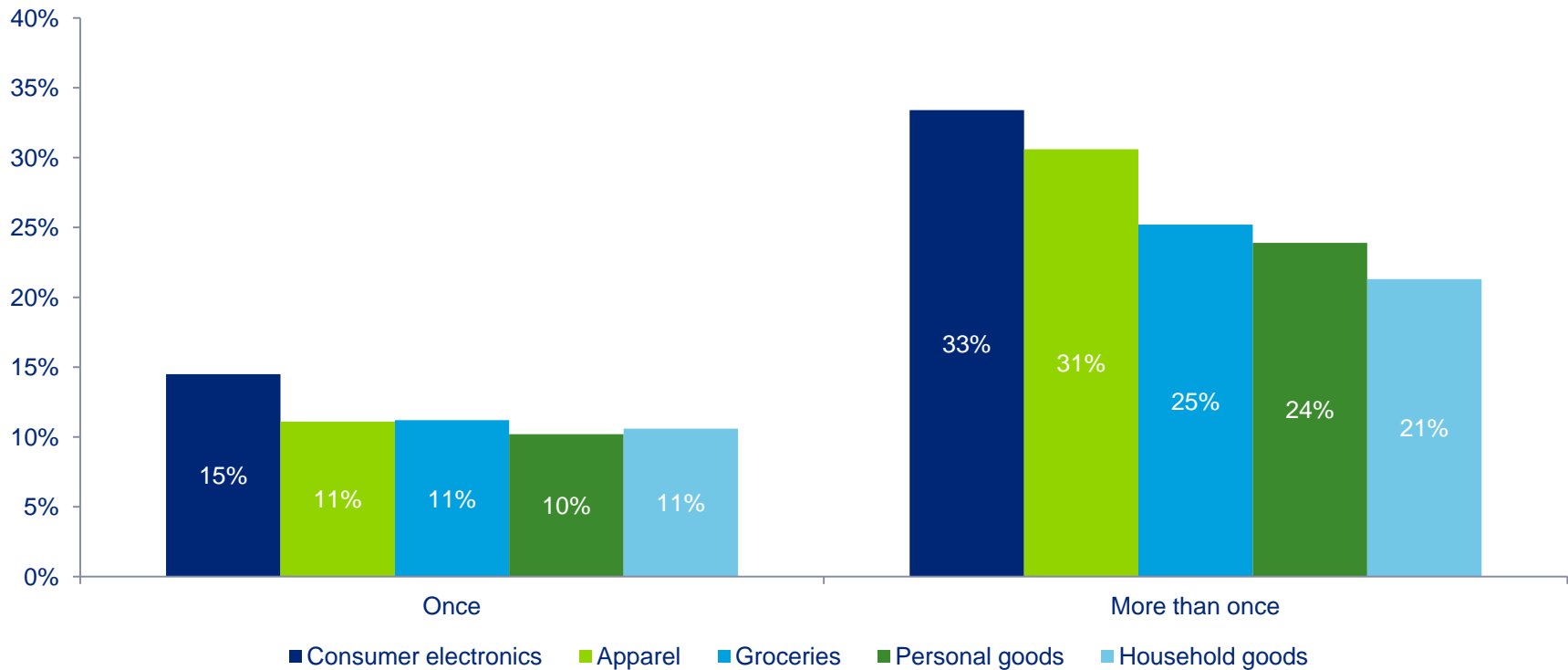
- Consumer electronics are the most bought category of consumer goods by consumers using their mobile devices. About 48% of respondents have bought consumer electronics at least once in the last 12 months. Respondents bought household goods the least often.

Source: Deloitte 2011 Consumer Food and Product Insights Survey , May 2011, n=705 (Respondents who own smartphones or web-enabled mobile devices)

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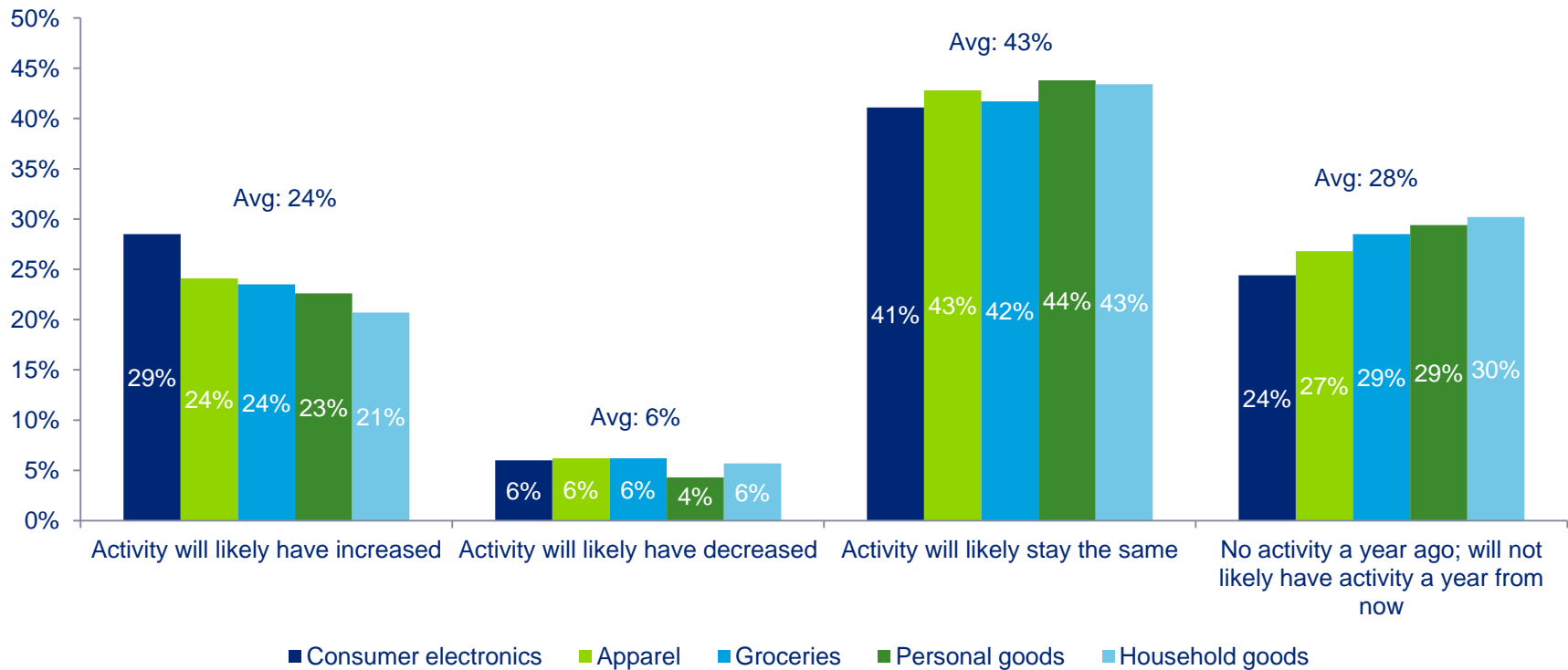
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# One in four shoppers believe that the use of mobile phones for shopping related activities will increase in the next 12 months

## Future of mobile phones and shopping related activities

Survey Question: A year from now, how do you expect your shopping-related activities on a smartphone or other web-enabled mobile device will have changed for the following products?



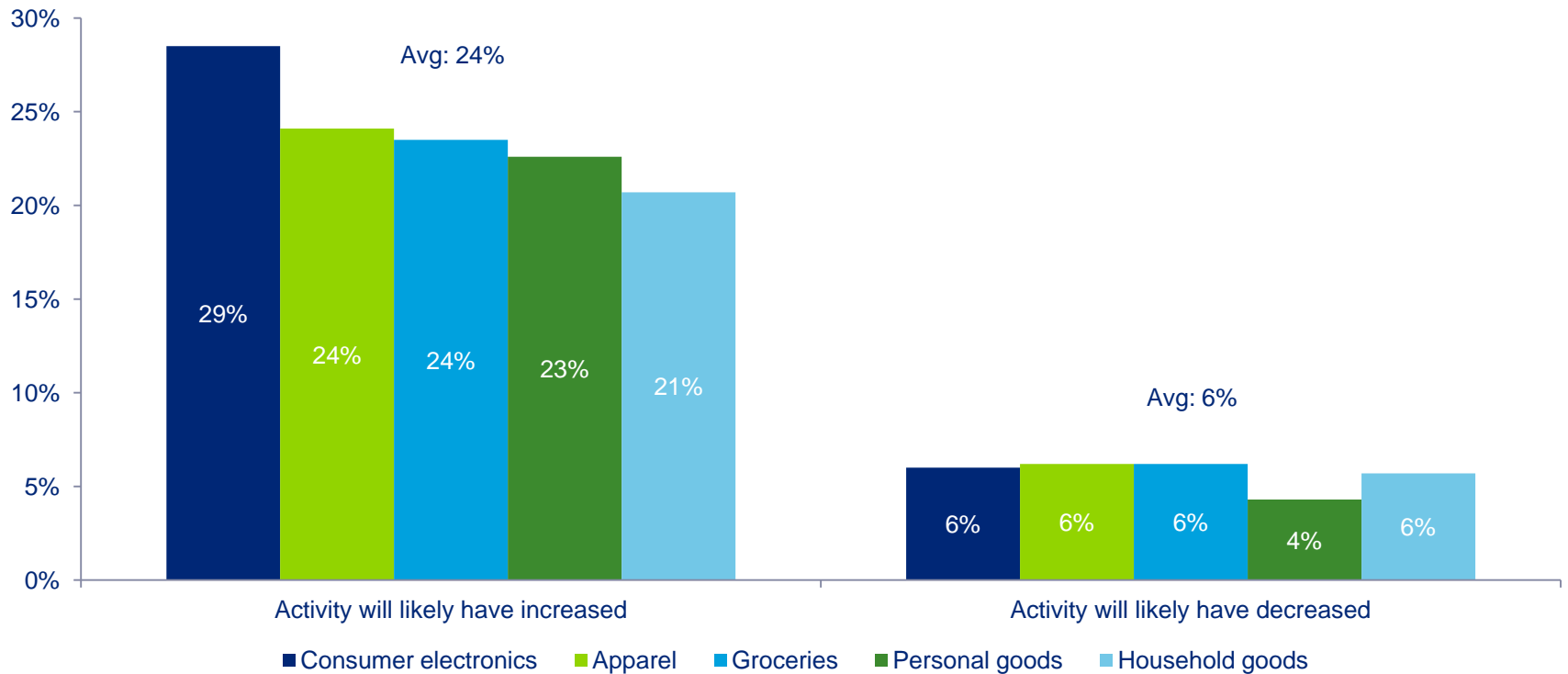
- On an average, 24% of respondents felt that the use of mobile phones for shopping related activities will increase in the next 12 months

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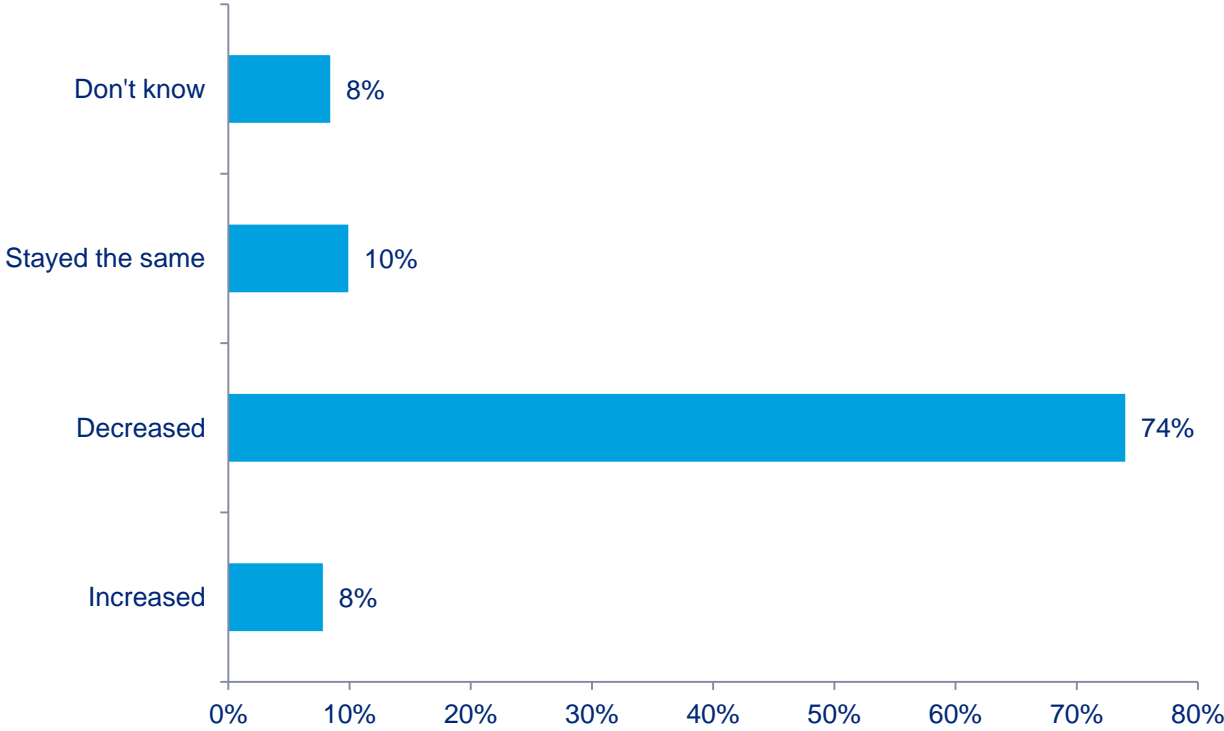


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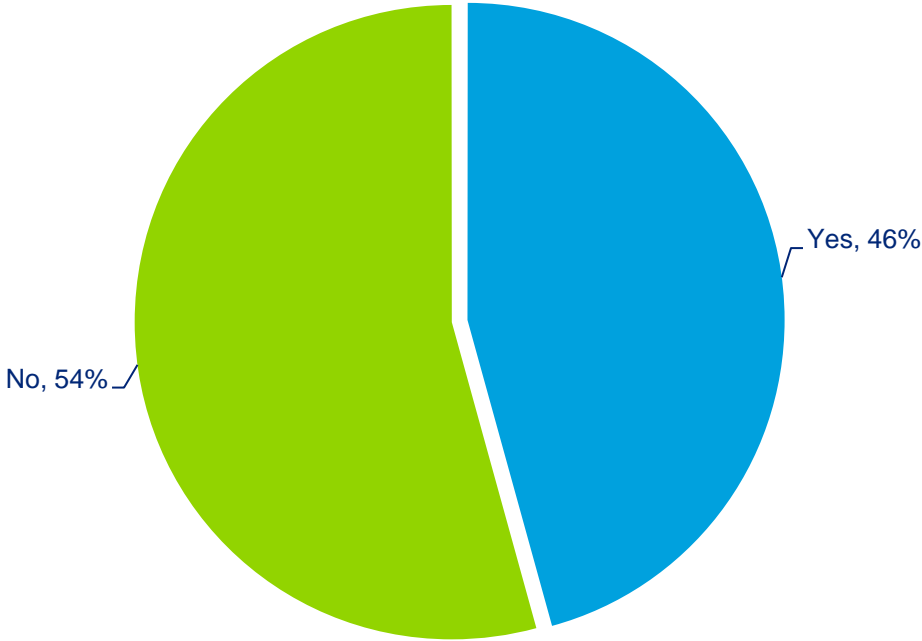
Source: Deloitte 2011 Consumer Food and Product Insights Survey , May 2011, n=705 (Respondents who own smartphones or web-enabled mobile devices)

Rising prices

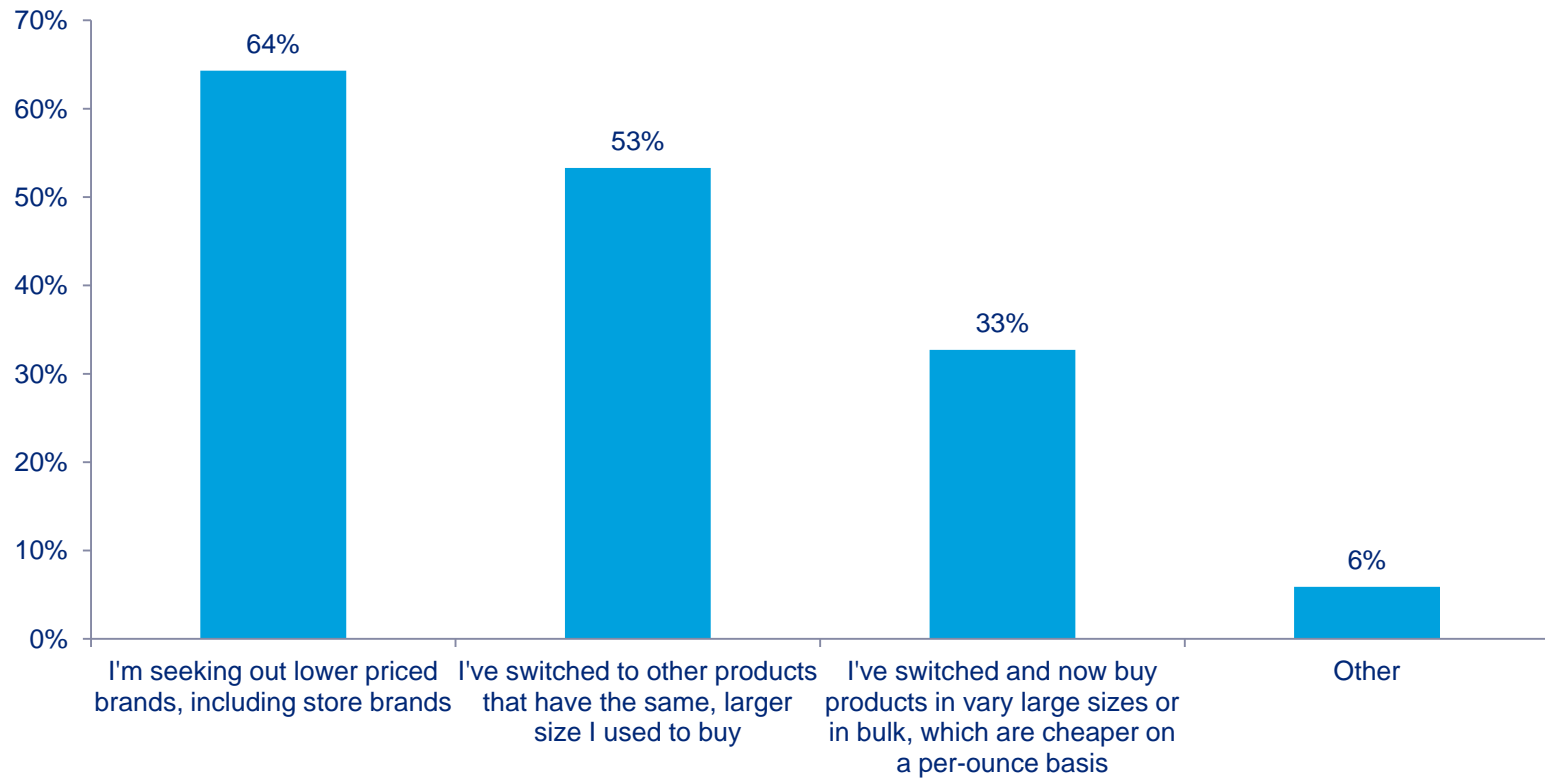
# Do you think that the sizes (in ounces) of some packaged foods have recently increased or decreased?



# Have you changed your food buying behavior for those products that have smaller package sizes?

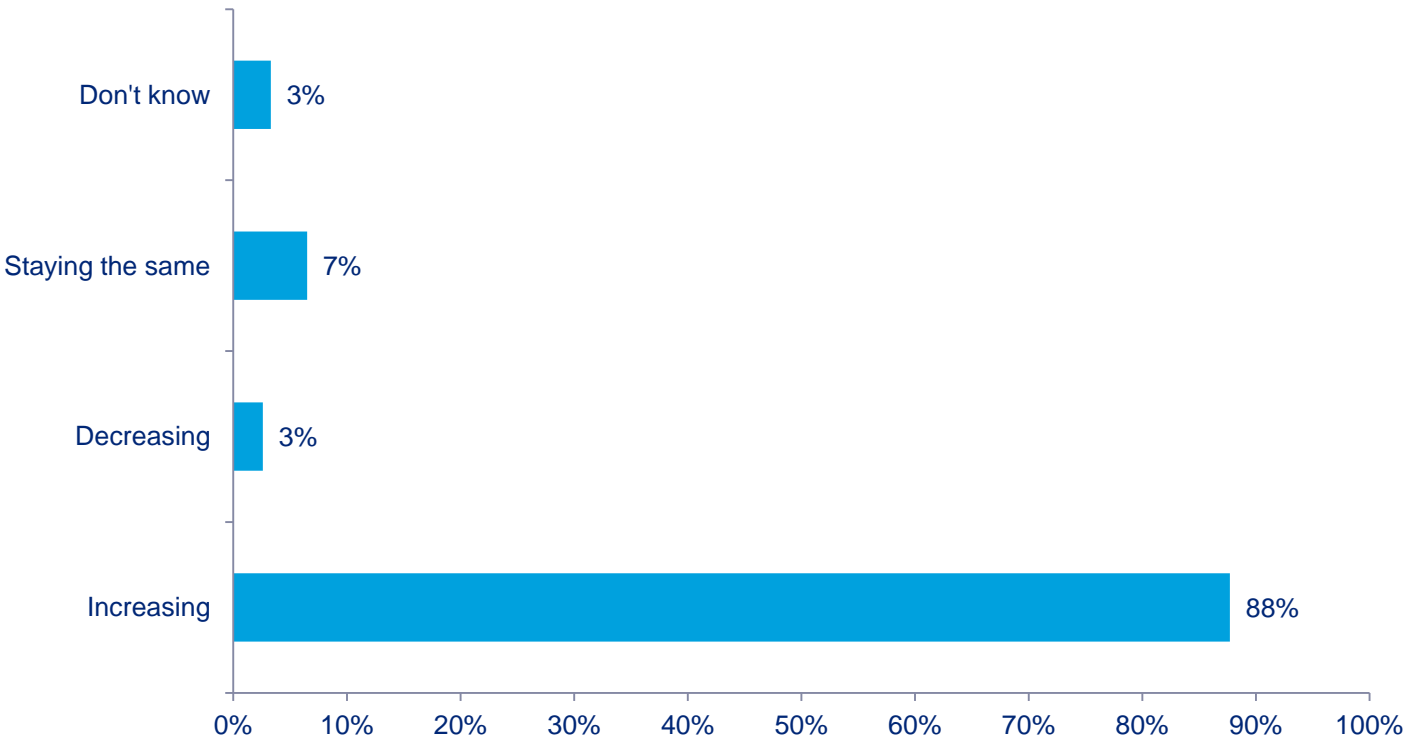


## In what ways have you changed your purchase behavior for those products that have smaller packages sizes? (check all that apply)

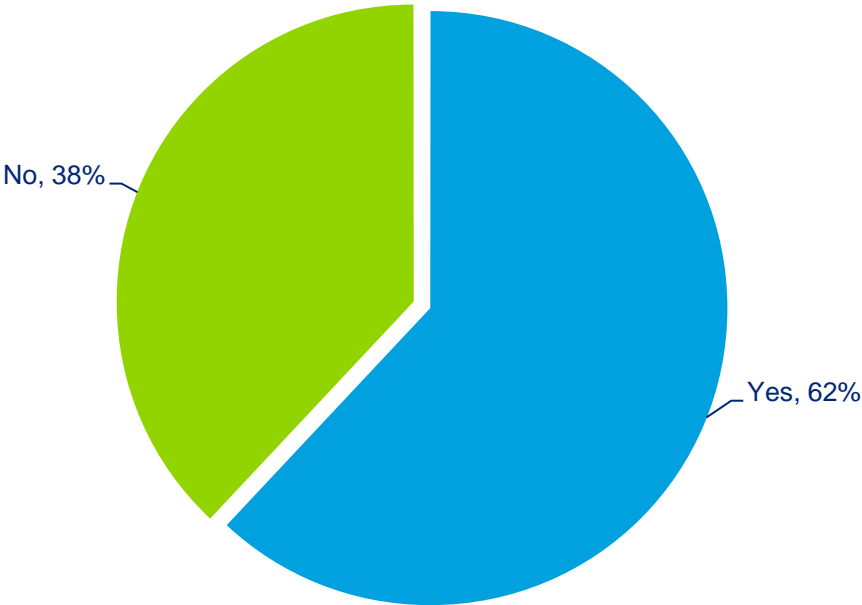


Source: Deloitte 2011 Consumer Food and Product Insights Survey n=676, consumers who have changed their behavior

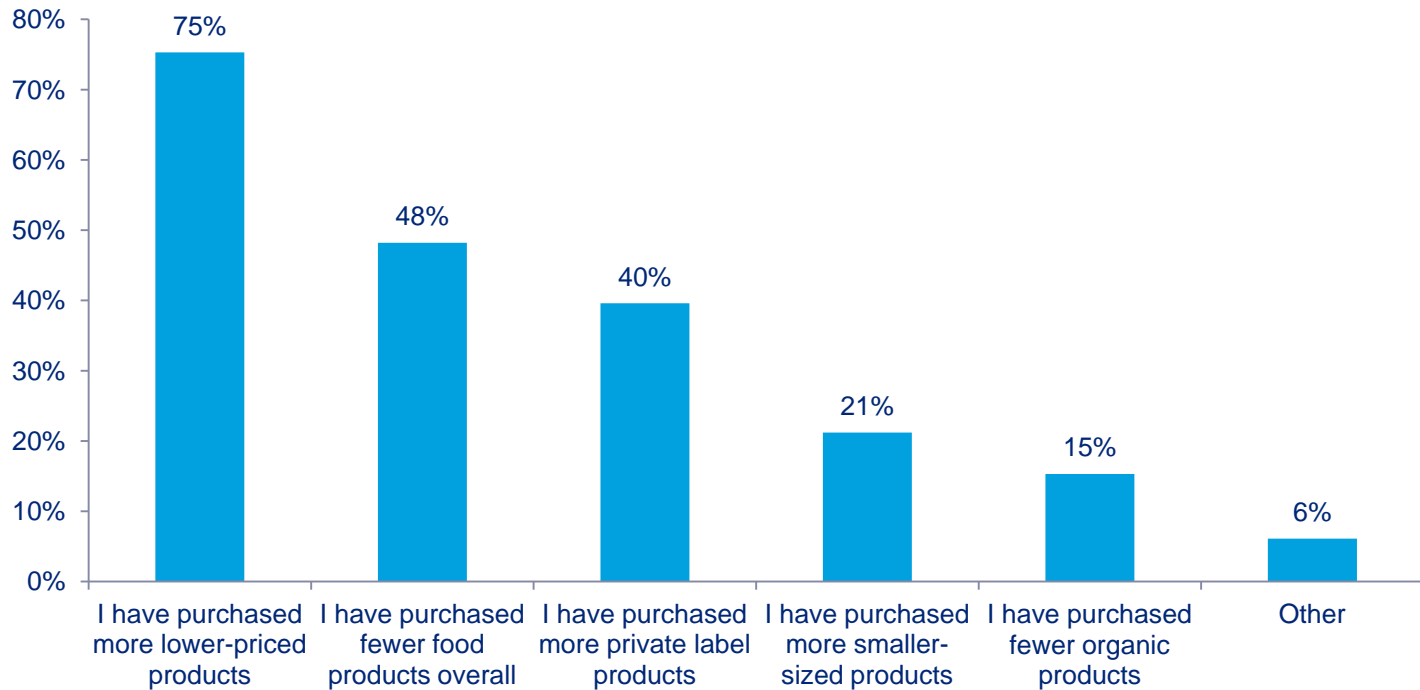
# Do you believe that food prices in food stores have recently been increasing or decreasing?



**As a result of higher food prices, have you changed your food buying behavior (e.g., purchased smaller sizes, etc.)?**

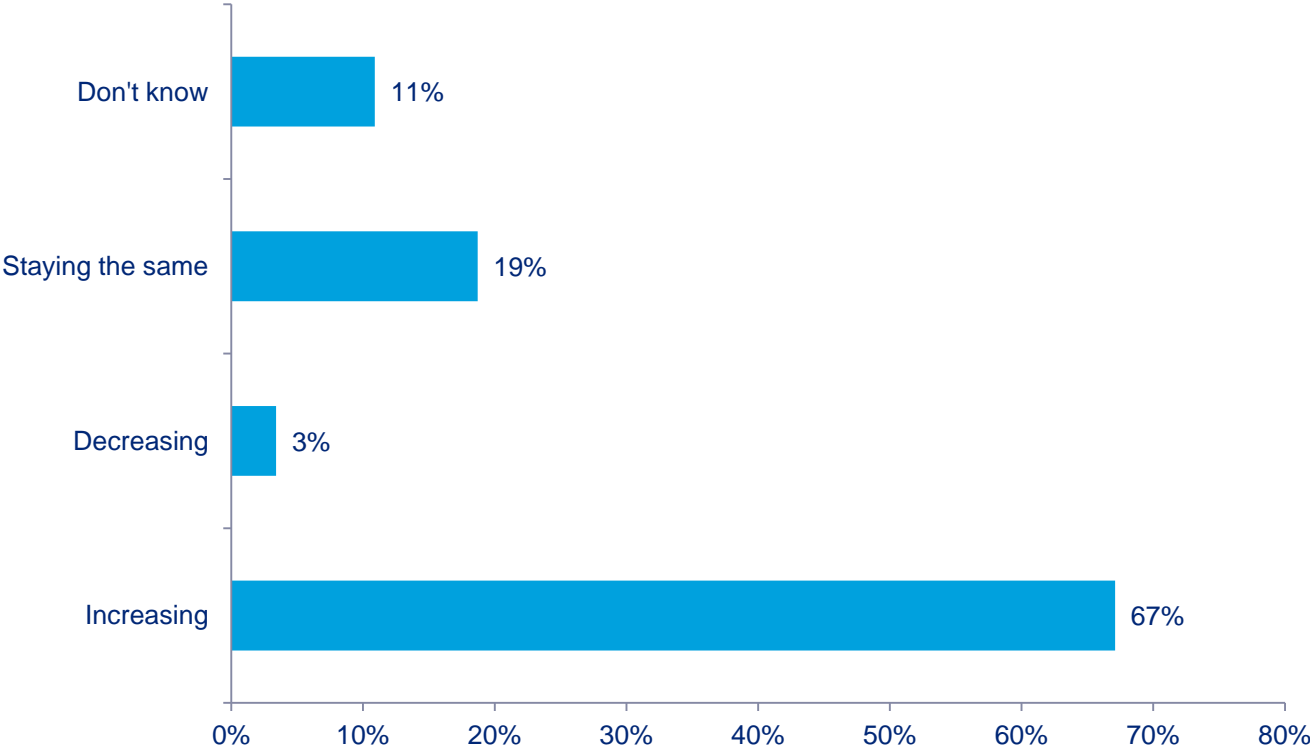


## As a result of food price increases, how have you changed your food buying behavior? (check all that apply)

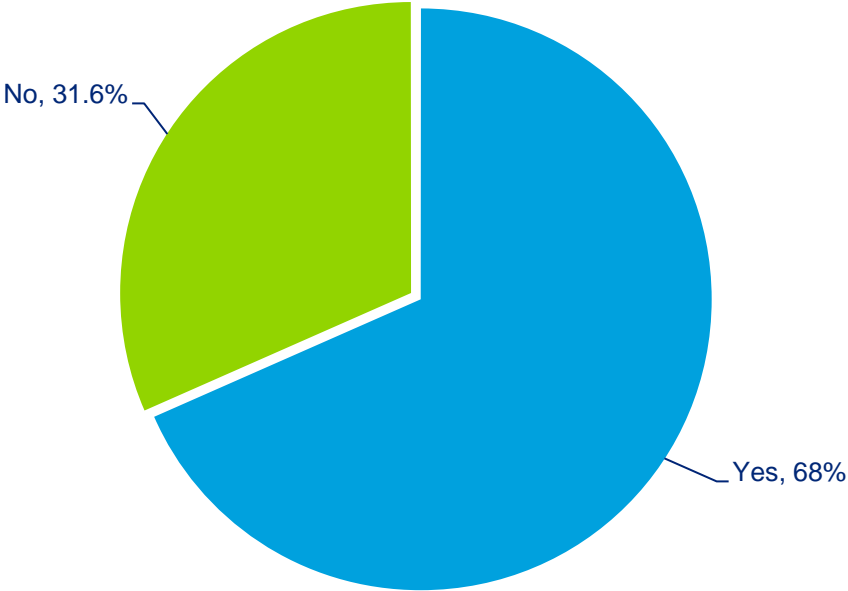


Source: Deloitte 2011 Consumer Food and Product Insights Survey n=1087 consumers who have changed their behavior

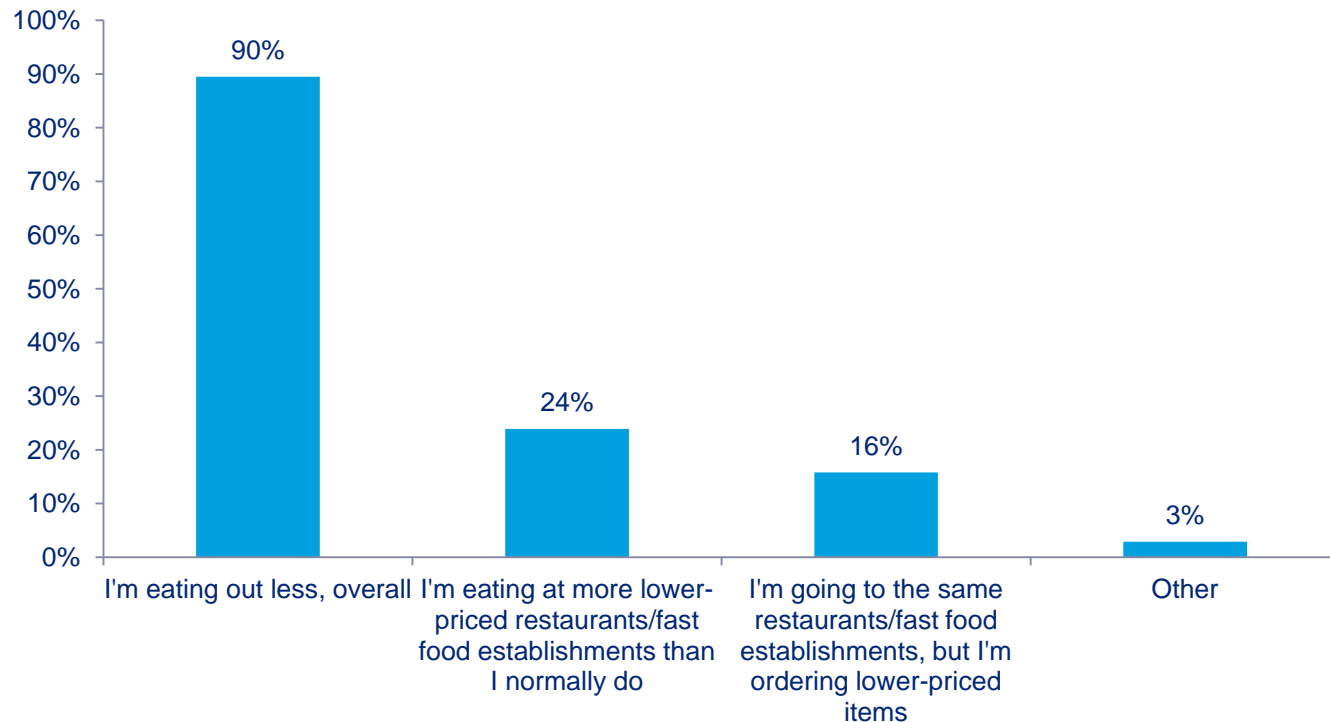
# Do you believe that food prices in restaurants and/or fast food establishments have recently been increasing or decreasing?



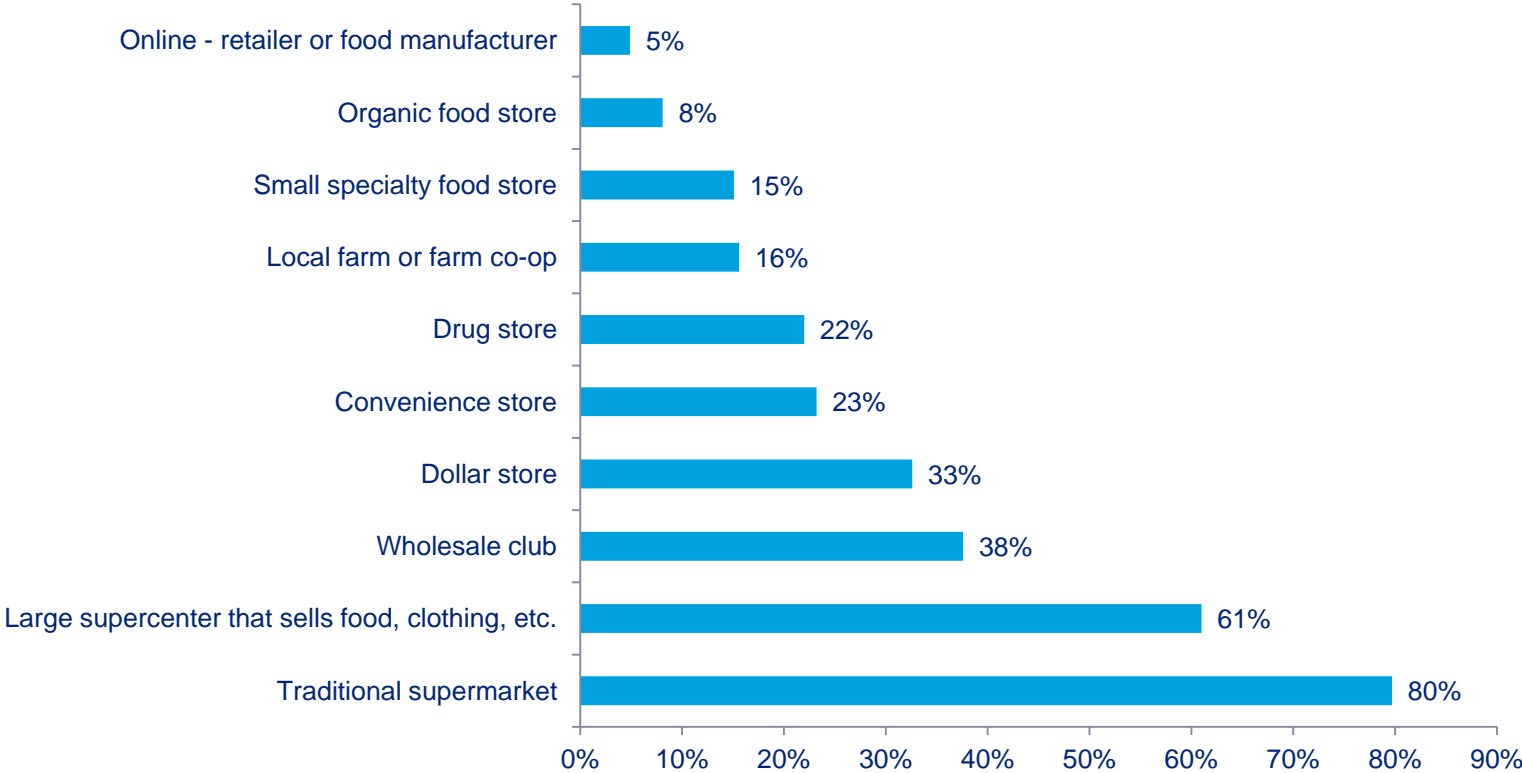
# As a result of food price increases in restaurants and/or fast food establishments, have you changed your eating-out behavior?



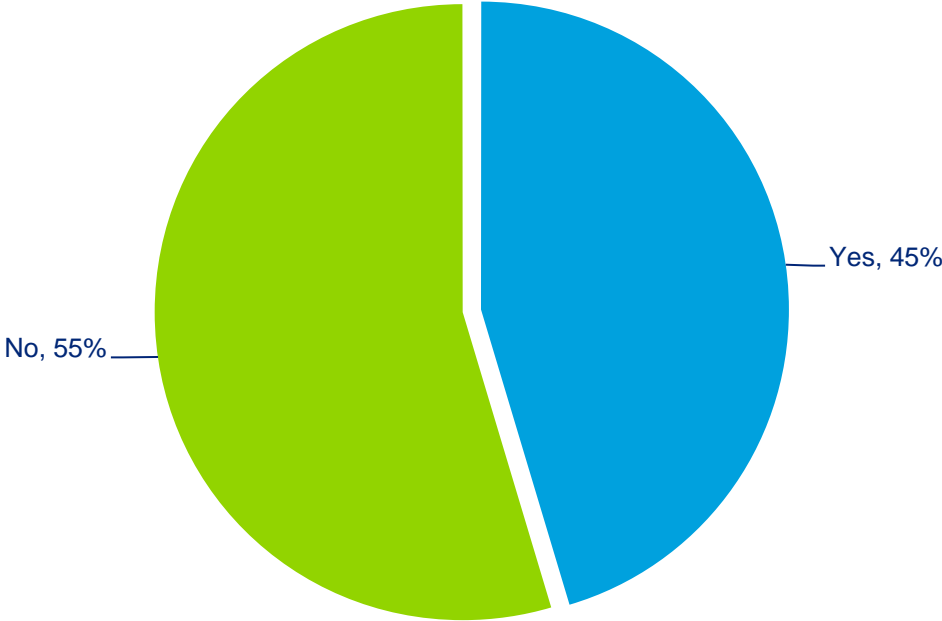
## How have you changed your eating-out behavior as a result of higher prices at restaurants or fast food establishments? (check all that apply)



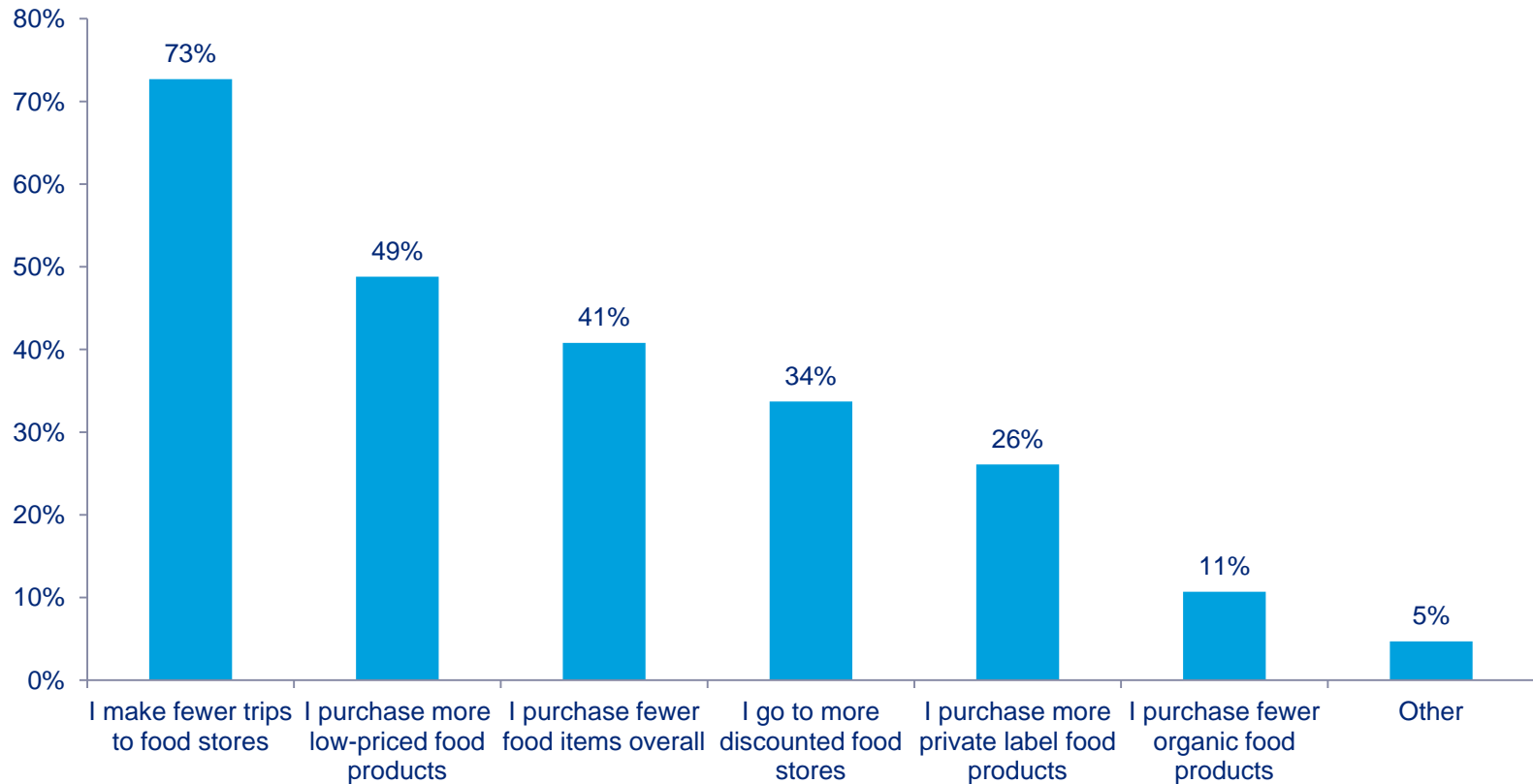
**Over the past year, did you purchase food (to be consumed at home) at a: (check all that apply)**



# As a result of higher gas prices, have you changed your food buying behavior?



## As a result of higher gas prices, how have you changed your food buying behavior? (check all that apply)

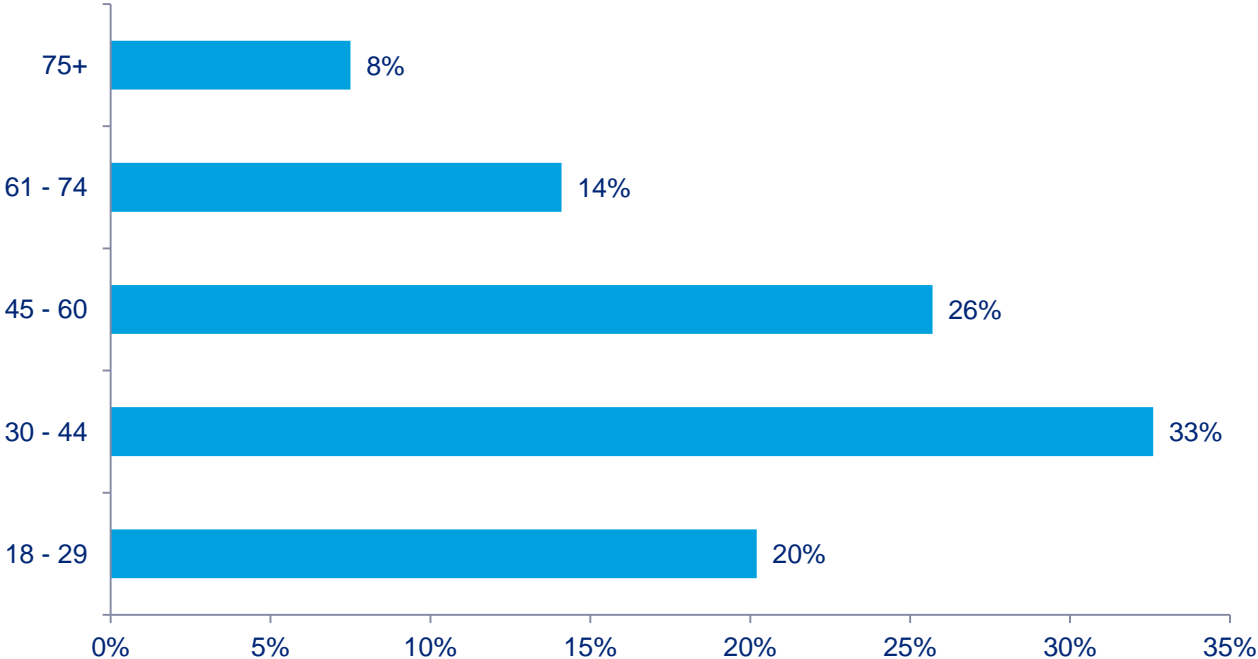


# Demographics

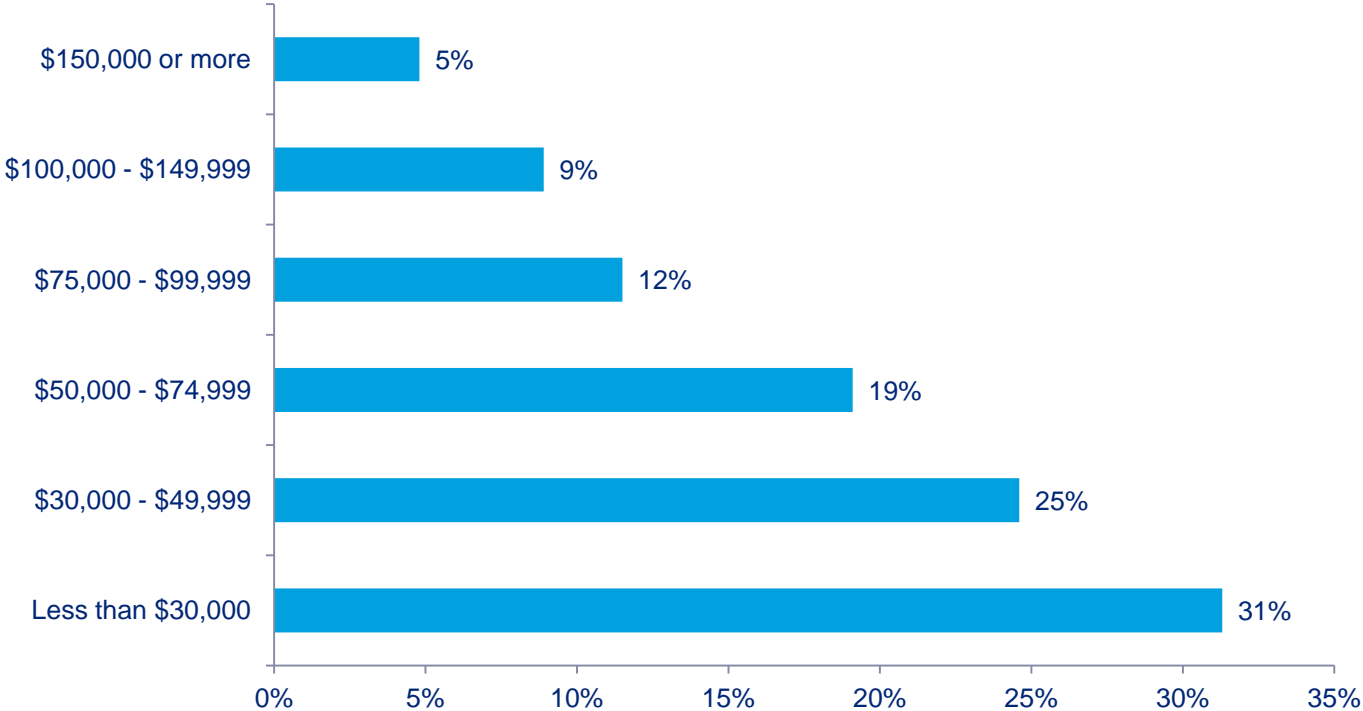
# What is your gender ?



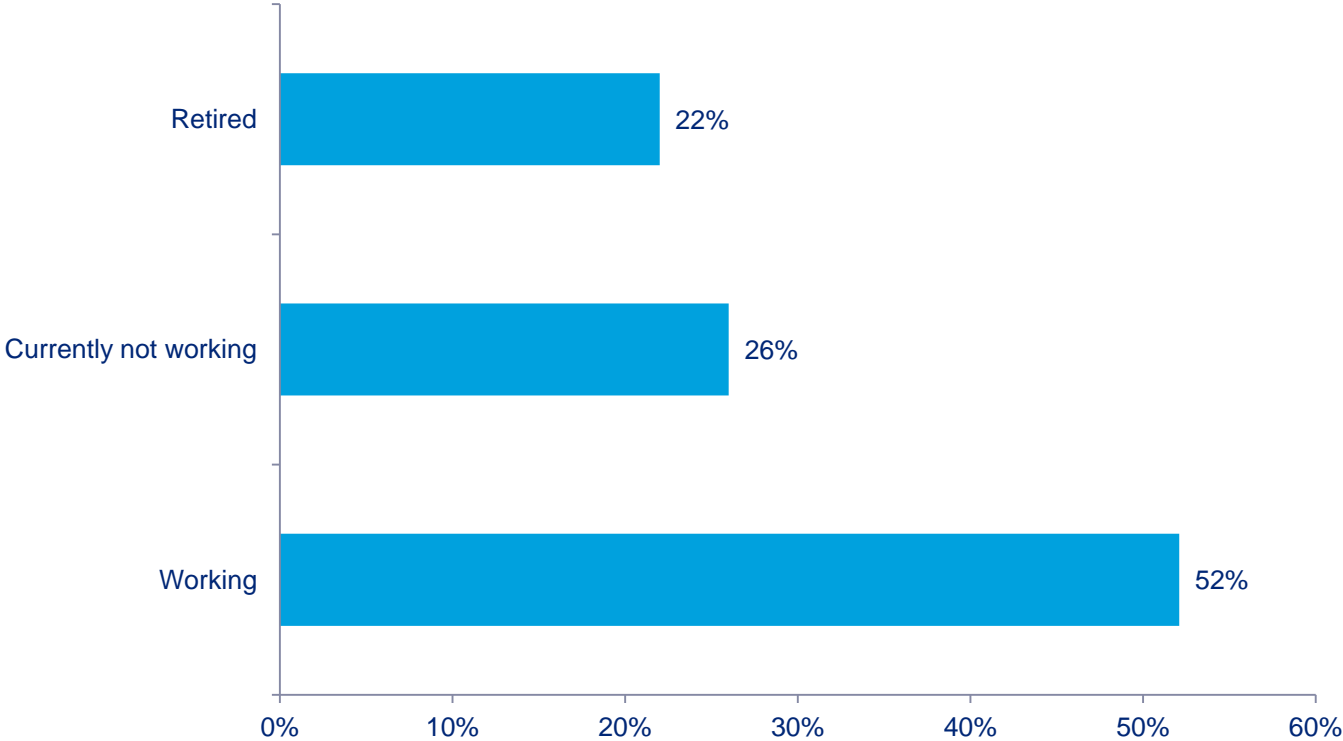
# Which age group are you in?



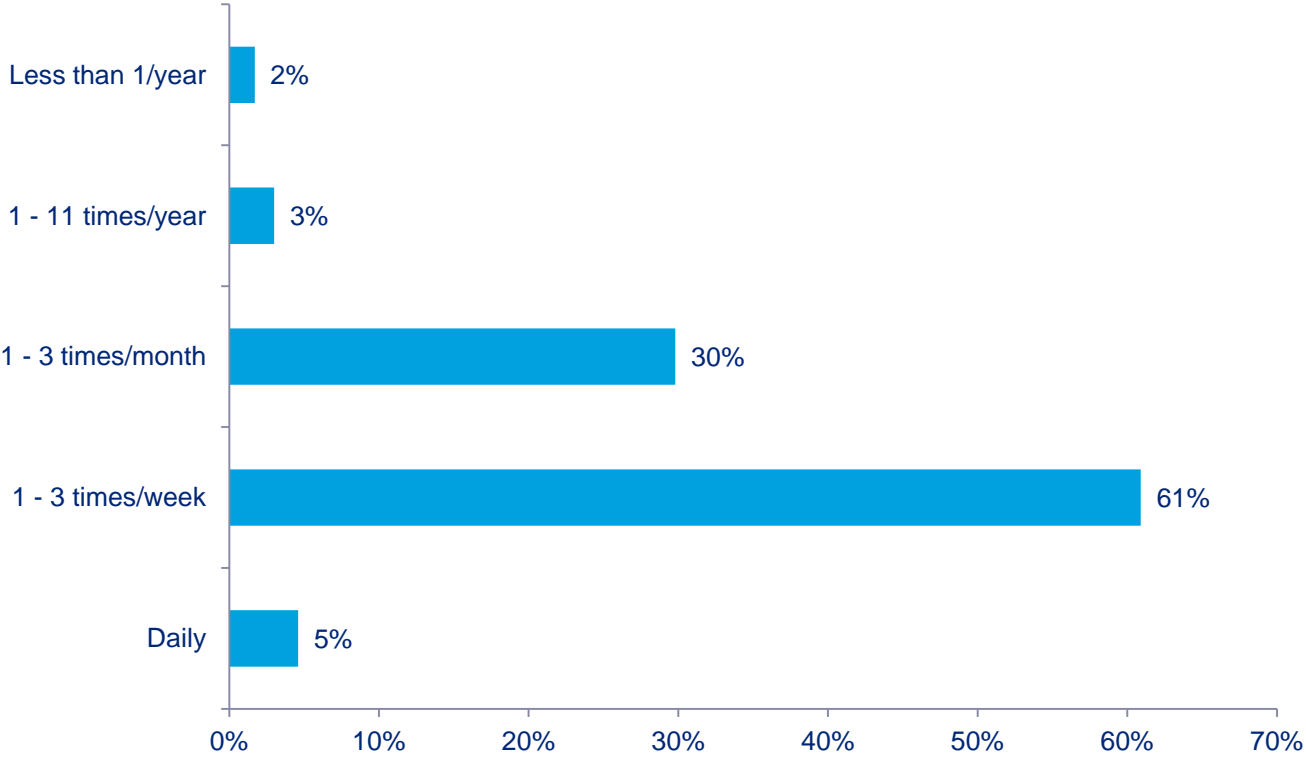
# Which of the following categories includes your household's total annual income before taxes?



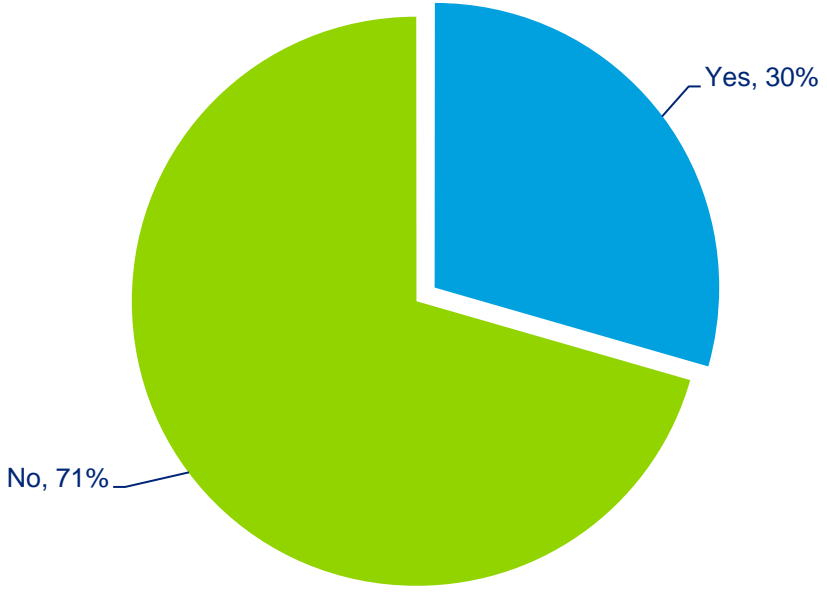
# What is your current employment status?



# How often do you shop for food items ?



# Do you have children living at home who are under the age of 18?



# About the Deloitte survey

- The survey was commissioned by Deloitte and conducted online by an independent research company between May 16 - 18, 2011.
- The survey polled a nationally representative sample of 2,000 consumers.
- The survey has a margin of error of +/- five percentage points.



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