

**Minority markets in the U.S. currently have
\$3.9 trillion buying power**



Hispanic shoppers

\$1.5 T

+212% since 2000



Black shoppers

\$1.3 T

+114% since 2000



Asian shoppers

\$1.0 T

+267% since 2000

Source: newswise.com

**Traditional channels dominate the grocery shopping
landscape, but online has escalated this year**

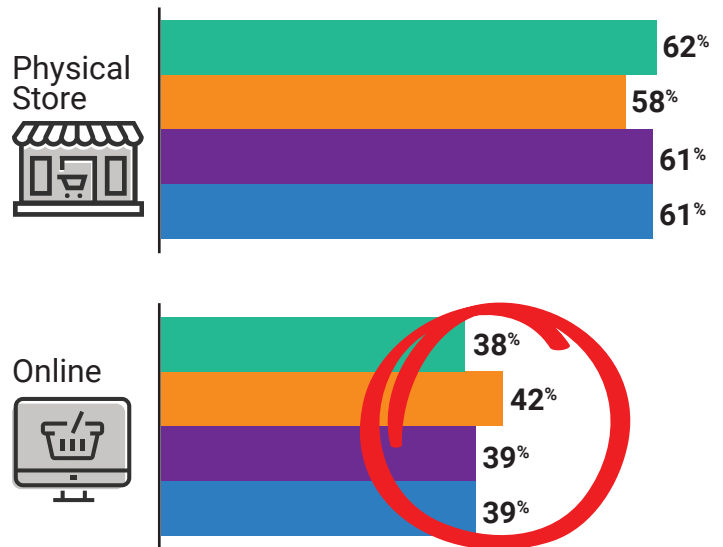
CHANNELS REGULARLY SHOPPED



All online shopper segments spend about 40% of their grocery dollars online

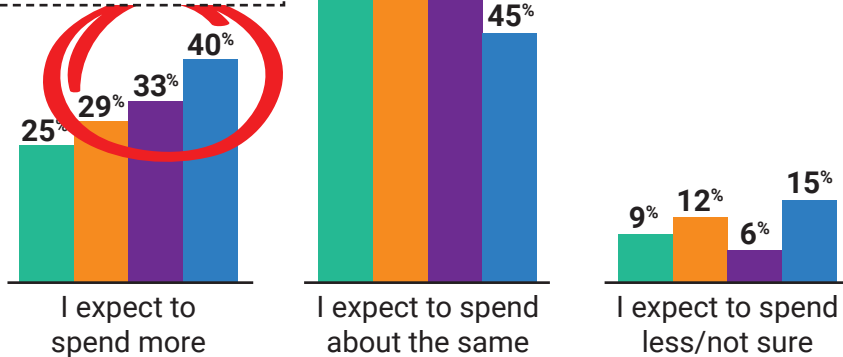


AVERAGE CURRENT MONTHLY GROCERY SPEND



FUTURE INTENT OF ONLINE GROCERY SPEND

Hispanic, Black and Asian shoppers all expect to spend even more online in the future



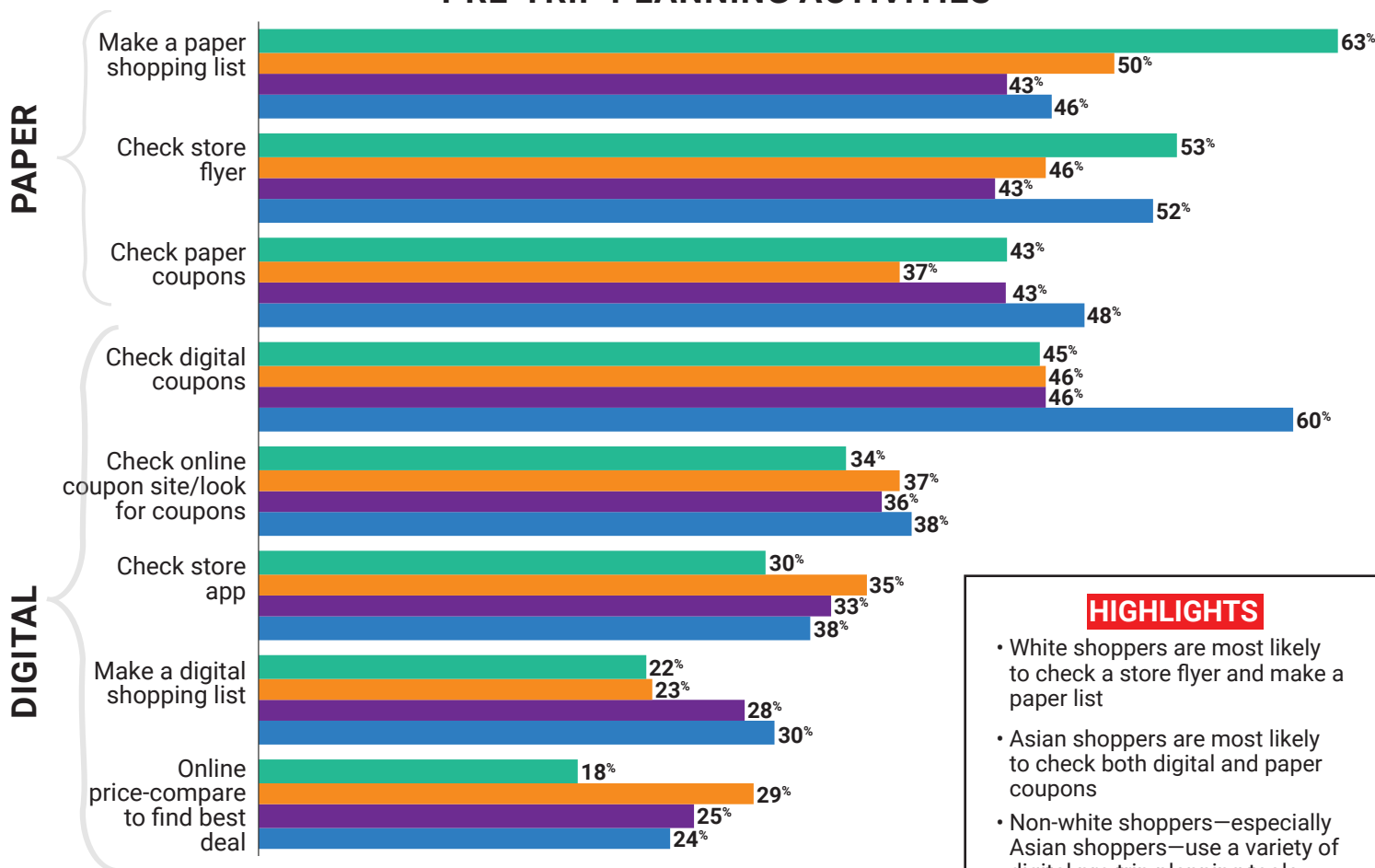
■ White shoppers ■ Black shoppers
■ Hispanic shoppers ■ Asian shoppers



Paper lists and store flyers are still used by at least half of shoppers

PRE-TRIP PLANNING ACTIVITIES

White shoppers
Hispanic shoppers
Black shoppers
Asian shoppers



Multicultural households are more likely to enjoy grocery shopping

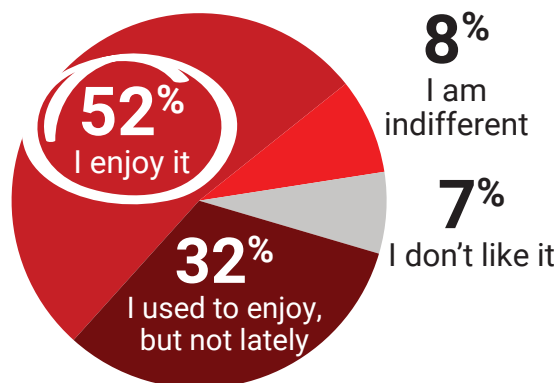
SHOPPING ENJOYMENT BY SEGMENT

Enjoy	98	133	129	108
Used to enjoy	103	78	75	75

White shoppers Black shoppers
Hispanic shoppers Asian shoppers

Multicultural households are more likely to enjoy grocery shopping

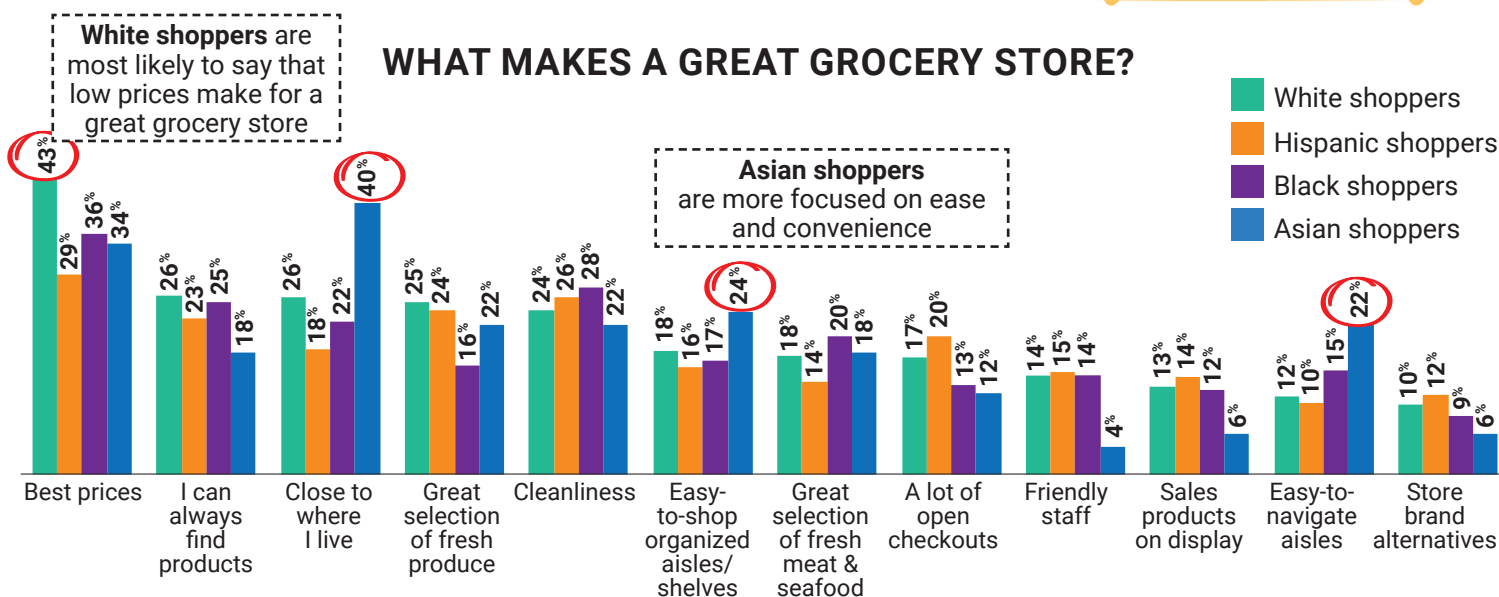
ENJOYMENT LEVEL OF ALL SHOPPERS



Low prices, ease and convenience top the list of what makes a great grocery store



WHAT MAKES A GREAT GROCERY STORE?



Quality trumps everything else when it comes to perceptions of a great food brand, particularly among white shoppers



WHAT MAKES A GREAT FOOD BRAND?

