A country’s food culture – from health standards to trendy foodies to social sharing – can be seen as a litmus test for the diversity of that nation. Certainly it is food culture that has largely shaped civilisations and will no doubt continue to be a measurement of both living standards and social trends for generations to come.

As a global public relations agency, Weber Shandwick considers it our mission to be at the forefront of trends that engage others, not only in the communications sector but in each industry that we work. And food trends are no different.

Our Food Forward Trends Report draws on insights from food experts and from a survey of more than 3200 consumers to predict the biggest trends for the coming year in Australia, China, Korea and Singapore. Based on these trends, we have identified key areas that serve to compare the food industries of these markets in Asia Pacific.

All surveys were conducted by Weber Shandwick and survey companies Qualtrics (in China, Korea and Singapore) and Pure Profile (in Australia). We have included country-by-country comparative data throughout the report whenever possible, although not all questions were asked in every country to allow the survey to address topics most relevant to each local market.

“We are delighted to launch the Food Forward Trends Report, allowing our teams across Asia Pacific to offer a close look of the current state of the food industry,” said Baxter Jolly, Vice Chairman, Asia Pacific. “Our research outlines the most relevant trends in the sector today, and we see it as a valuable resource for food industry marketers and retailers.”

From gauging international influence to predicting online purchasing power, both expert insights and consumer trends suggest that the way we choose, prepare, purchase and share food experiences is being reshaped in 2014. The goal for our research is to provide insights that can be shared among brands, retailers and consumers and to engage our everyday thinking about food culture in Asia Pacific.
As globalisation and online media have exposed people to new ideas, perspectives and cultures, the international food scene in many countries has become dramatically more accessible, diverse and in-demand. Across the four markets in our Food Forward Trends Report – Australia, Singapore, Korea and China – there is an acceptance that international flavours have become or are becoming part of the local culture. How much consumers are embracing this trend differs greatly.

Chinese consumers are largely inclined to stick to what they know, with 86% choosing to eat locally produced food most of the time or always. However, 42% say that they do in fact shop at specialty supermarkets for foreigners, suggesting that consumers are quite receptive to trying new foreign flavours, no doubt an example of the rising popularity of blending international trends with local culture in China.

Similarly, when asked how often they choose to eat foreign produced food, more than one third of Koreans (38%) said rarely or never, and 55% responded with sometimes. Only 7% said always or some of the time. It seems that Koreans are not the only ones to prefer their cuisine. The rising global interest in Korean culture has had its influence on food, as well. In her article about popular flavours around the world, Priyanka Bagde, Survey Analyst for Euromonitor, noted that, “Asia Pacific and North American analysts report a huge boom in the popularity of Korean food.”

Responses from our own Food Forward survey also support this cultural preference, with Korean topping the list of foods purchased at foreign specialty stores in China, appearing as the most prominent emerging style of restaurant or cuisine in Singapore (according to nearly two thirds, or 61%, of Singaporean consumers), and appealing to Australians among other food trends such as the latest dessert craze, American diner food and Scandinavian cuisine.

Although Korean cuisine was not considered the most enticing new trend in Australia (with 11% saying it appeals to them the most), consumers certainly favour the plethora of international flavours Down Under. When asked which likely trend was most appealing to them (among those flavours identified by experts as big in 2014), 18% of Australian consumers selected South American cuisine, but the standout trend of 2014 is the gourmet burger, according to one in three respondents (28%). This is no surprise to food blogger Thang Ngo, who predicts that, “a casualisation of dining will continue into 2014”, while Grant Jones, National Food Writer for News Corp Australia, predicts that taste and preference for certain foreign foods will become more sophisticated in the nation.
With Singapore's population of multi-ethnic locals and expatriate residents, it comes as no surprise that foreign and exotic ingredients have made their way onto the shelves of the nation's supermarkets, convenience stores and specialty grocers. The majority of Singaporean consumers (87%) expect that foreign foods will continue to be part of the country's food scene, but they are divided on what impact this will have, with 44% saying that food from foreign countries will not impact local food, contrasting with 43% that think it will become infused into local culture.

Singaporeans not only agreed that foreign flavours – in one form or another – are here to stay. They also united in their love of local hawker food (traditional street food), which is what eight in ten respondents (81%) most commonly choose to eat when not at home.

Our experts agree that traditional hawker food will remain part of Singapore’s culture, but this is one area where foreign flavours may start to have a greater influence on local foods.

Margaret Cunico, President, Consumer Practice, Weber Shandwick Singapore, explained, “Hawker food is essentially the melting pot of food cultures represented in Singapore: Malay, Thai, Chinese, Indian and Middle Eastern, among others, so my prediction is that we will see more country names added to the list in the future.”

Celine Asril, Food Editor for HungryGoWhere supported this notion, too, “Hawker centres are here to stay, although they will continue to evolve in terms of authenticity.”

The below food trends are predicted to be big in Australia in 2014. Which appeals to you most?

Among Australian consumers

- Gourmet burgers: 28%
- South American cuisine: 18%
- Fine dining: 14%
- Cantonese fare: 11%
- Korean cuisine: 10%
- The latest dessert craze: 10%
- American diner food: 9%
- Scandinavian cuisine

Are exotic ingredients from foreign countries a fad in Singapore, or will they become ingrained into local culture?

Among Singaporean consumers

- Here to stay but won’t impact local food: 44%
- Here to stay and will eventually be infused into local culture: 87%
- A fad: 13%
- A fad: 43%

Where do you most commonly eat food when you’re not at home?

Among Singaporean consumers

- Street vendors, hawker food: 81%
- Restaurants/cafes: 67%
- Fast food outlets: 65%
- Friends’ houses: 6%
- Other: 2%
That the proclivity of online social sharing has had an impact on our offline food experiences is not entirely surprising. What is notable is how the interplay between the two varies significantly across the four markets surveyed.

People in China are super-sharers: far more likely than those in any other country to post online about their food experiences, and about seven times more likely than Australians in particular to post on a frequent basis. Nearly half (46%) of Chinese respondents post once a week or more, compared to one in three Koreans (29%), one in four Singaporeans (25%) and less than one in fourteen Australians (7%).

Influencers also play a role on food decisions and there is considerable regional variance, according to consumers. When asked whether they were more likely to buy a food product or visit a restaurant endorsed by a celebrity chef or ambassador, Koreans and Singaporeans were both somewhat evenly divided, while Chinese and Australian respondents again stand in contrast.

How frequently do you post about your food experience on social media?

- **Once a week or more**:
  - China: 46%
  - Korea: 29%
  - Singapore: 25%
  - Australia: 7%

- **About once a month**:
  - China: 36%
  - Korea: 18%
  - Singapore: 19%
  - Australia: 10%

- **Rarely or never**:
  - China: 52%
  - Korea: 62%
  - Singapore: 62%
  - Australia: 83%
Chinese consumers are about eight times more likely than Australians to say they are influenced by celebrity endorsements (71% vs 9%). Nearly half (49%) of Australians – far more than those in any other market – go so far as to say they are less likely to buy a product or visit a restaurant based on a celebrity endorsement, compared to just 5% of their Chinese counterparts.

The contrast between these regional results could suggest that with the prominence of food-based television programmes and celebrity chefs in Australia, a significant number of consumers are suffering from “foodie fatigue”. As Ben Bale, Vice President, Digital at Weber Shandwick Australia pointed out, “Traditional food writers and celebrities must now compete with our friends in social feeds and review sites when attempting to influence our decisions”.

In contrast, consumers in China still largely aspire to not only follow the advice of influencers they admire, but to prove their own social status online by showing that they too are buying the same products and visiting the same restaurants as their favourite celebrities. David Liu, Chairman, Weber Shandwick China, said, “We are witnessing a huge rise of celebrity culture in China, and their influence on consumer choices is extensive. Food choices are no exception, and the popularity of foods or restaurants can be hugely increased by celebrity or influencer endorsement, as Chinese consumers seek to emulate their idols”.

Are you more or less likely to buy a product or visit a restaurant based on a celebrity endorsement?

<table>
<thead>
<tr>
<th></th>
<th>China</th>
<th>Korea</th>
<th>Singapore</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely</td>
<td>71%</td>
<td>37%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Neither more or less likely</td>
<td>24%</td>
<td>37%</td>
<td>46%</td>
<td>42%</td>
</tr>
<tr>
<td>Less likely</td>
<td>5%</td>
<td>26%</td>
<td>31%</td>
<td>49%</td>
</tr>
</tbody>
</table>
No matter what country you live in, safety and ethical sourcing of food is an important topic. With increasing regulation of food and recent global food safety scares, it will continue to be top of mind as people make purchasing choices in the coming year.

In China, possibly due to the number of high profile food safety scares and the spotlight on environmental issues, it is of particular significance to consumers to know about the origin of their food. Eight in ten (84%) Chinese consumers said it was extremely or very important to know where their food has come from, compared to 45% in Korea and 43% in Singapore.

Concerns over hidden ingredients and additives in food will likely increase among consumers as food processing procedures evolve and new technologies emerge. Consumers in China and Singapore support this prediction, with over half (56%) of Chinese, and more than one third (37%) of Singaporean consumers, stating that the ingredients and additives mentioned on the labels very often, or always, influence their purchases.

Perhaps unsurprisingly, the notion of organic food seems to be making an impact in China. Nearly all respondents (96%) said that they choose to buy organic food at least occasionally if not always, with only 4% responding with never.
There is some debate as to what constitutes an organic product in China, when compared to the more formal certification processes required in other countries. Regardless, the strong interest in organic suggests that Chinese consumers are indeed concerned with pesticides and chemicals in food and the environment in which produce is grown, and they welcome the push for organic products.

When buying household food, do the ingredients and additives mentioned on the labels influence your purchases?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>China</th>
<th>Korea</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Often to Always</td>
<td>56%</td>
<td>37%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Never</td>
<td>2%</td>
<td>5%</td>
</tr>
</tbody>
</table>

How often do you choose to buy organic when shopping?

Among Chinese consumers

- Very often to always: 54%
- Occasionally: 42%
- Never: 4%
Predicting Online Purchasing Power

With the convenience of online shopping, rising confidence among online consumers and the growing number of smartphone users across the region, the potential for food producers and retail stores to take their products online is enormous – especially in China, where predictions are that online sales could reach $650 billion by 2020.²

Despite its potential for the future, online shopping today suggests the food industry has significant room to grow before purchasing weekly groceries on the web goes mainstream. When asked where they most commonly shop for food, 21% of Chinese consumers chose online, compared to 71% who chose supermarkets. The preference for online food shopping is similar in Korea, with 19% selecting online shopping, though Singapore showed much more conservative figures at only 4%.

Looking more closely at Chinese consumers, our study found that this small but active group of digital shoppers are not only buying online, but they are regularly buying online. Among those surveyed, the majority (71%) bought food or drink online at least once a month.

As Darren Burns, Managing Director of Weber Shandwick China predicts, “This activity has become nearly ubiquitous as Chinese consumers grow more enamoured with the convenience of online shopping. The food and beverage market is no different than other sectors and this too will become a regular online purchase for many – especially in the major cities.”

² McKinsey “China’s e-tail revolution,” March 2013

“This activity has become nearly ubiquitous as Chinese consumers grow more enamoured with the convenience of online shopping. The food and beverage market is no different than other sectors and this too will become a regular online purchase for many – especially in the major cities.”

Darren Burns, Managing Director Weber Shandwick China
Where do you most commonly shop for your food?

<table>
<thead>
<tr>
<th></th>
<th>China</th>
<th>Korea</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>71%</td>
<td>88%</td>
<td>95%</td>
</tr>
<tr>
<td>Wet market/farmers market</td>
<td>84%</td>
<td>36%</td>
<td>56%</td>
</tr>
<tr>
<td>Wholesale supermarket</td>
<td>62%</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Department store/Premium food groceries</td>
<td>11%</td>
<td>20%</td>
<td>32%</td>
</tr>
<tr>
<td>Convenience store</td>
<td>25%</td>
<td>35%</td>
<td>24%</td>
</tr>
<tr>
<td>Online</td>
<td>22%</td>
<td>19%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>4%</td>
<td>0%</td>
</tr>
</tbody>
</table>

How often do you purchase food or drinks online?

Among Chinese consumers

- 15% Daily or several times a week
- 43% 2-5 times a month
- 13% Once a month
- 21% Less than once a month
- 8% Never
Whether shopping online or in person, price is still the greatest influencer when it comes to making food purchasing decisions, more so in Singapore (82%) than Australia (70%), Korea (63%) or China (60%). One in three (37%) Singaporean consumers also selected brand name as a top factor when making grocery choices, compared to 16% of Chinese, 16% of Korean and 12% of Australian consumers. Although premium food markets with brand name products do have an audience in Asia, it appears that food brands themselves still have a way to go in order to increase the value of name recognition. For Chinese, Korean and Australian consumers, brand names have less of an impact on purchases than nearly all other factors (price, ingredients, seasonal and local produce) except convenience.

It is worth calling out that despite the influence of celebrity endorsements in Chinese consumers’ preferences for foods, when it comes to day-to-day grocery shopping, price still prevails and brand names fall lower on the decision-making list.

Which of the following most affects your grocery choices?

- **Price/special offer**
  - Australia: 70%
  - China: 60%
  - Korea: 63%
  - Singapore: 82%

- **I buy the ingredients I need**
  - Australia: 42%
  - China: 60%
  - Korea: 53%
  - Singapore: 66%

- **Brand name**
  - Australia: 12%
  - China: 16%
  - Korea: 16%
  - Singapore: 37%

- **Local produce**
  - Australia: 25%
  - China: 55%
  - Korea: 49%
  - Singapore: 32%

- **What’s in season**
  - Australia: 45%
  - China: 64%
  - Korea: 53%
  - Singapore: 30%

- **I don’t care about cost, as long as it’s convenient**
  - Australia: 4%
  - China: 6%
  - Korea: 6%
  - Singapore: 8%
One factor that varied greatly between markets was the culture around home cooking and dining, and how this serves as a reflection to larger shifts in societal trends in some of Asia’s key markets.

The single question of “how often do you cook for family or friends” presented stark contrasts between the survey respondents in each country, with 75% of those surveyed in China responding “fairly often” – twice a week or more – compared to 61% of Australians, and just 42% in Singapore and 40% in Korea.

The first point that this highlights is the fact that the average household in Korea and Singapore is dramatically different than in Australia and China, as people are choosing to marry later, have fewer children, and are getting about on their own more frequently than ever before. It is Australia and China that may be the outliers in this case, as demographic trends in urban centres such as Hong Kong, Taipei and Tokyo are also seeing the rise of single living – and perhaps with that, single dining.

Experts in both Korea and Singapore cite the ongoing pressures of the modern urban environment as playing a major role in mealtime for the average adult consumer. In our Singapore Food Forward Trends Report 2014, Gladys Wong, Chief Dietician, Khoo Teck Puat Hospital, noted the effect this is having on dietary habits. “Work life in Singapore is hectic, and it is not about to slow down in the coming year.

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3. Asian demography: The flight from marriage
http://www.economist.com/node/21526329

4. Asian demography: The flight from marriage
http://www.economist.com/node/21526329
During the long working hours, Singaporeans prefer to eat on-the-go to save time and not lose concentration. This means that there is a strong market for fast foods, ready-to-eat meals, takeaways, and even liquid meal replacements."

This is also the case in Korea, though as Ho-sun Lee, former Editor-in-Chief of Lemon Tree, points out, this does not mean a demise in traditional food altogether. "It is true that small families and those living alone often eat out or buy single portion packaged foods and ready-made meals," she says. "However, they still have a penchant for Jip-bap (traditional home cooked dishes). As a result, we're seeing more people buying into the concept of cooking that feels like home, even when it comes to the preferred flavours of sambun yori (three-minute microwave dishes) and ready-made packaged meals."

Food also plays an important role in the social lives of Singaporeans and Koreans, slightly moreso than for their Australian counterparts – 55% in Singapore and 43% in Korea, compared to 33% in Australia – but less important than Chinese consumers, where 68% of people say that food is extremely or very important to their social lives. Chinese respondents were also the more likely to respond that they cook frequently for their friends and family, compared to their peers in Australia, China and Korea. This is not particularly surprising, considering the fact that the traditional family unit remains very common in China, and there has not been the same decline in marriage rates as has been noted in many other markets in Asia.

"...we’re seeing more people buying into the concept of cooking that feels like home, even when it comes to the preferred flavours of sambun yori and ready-made packaged meals."

Ho-sun Lee, former Editor-in-Chief of Lemon Tree

How important is food to your social life in terms of cooking and/or eating out?

<table>
<thead>
<tr>
<th>Importance</th>
<th>Australia</th>
<th>China</th>
<th>Korea</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely or very important</td>
<td>68%</td>
<td>55%</td>
<td>43%</td>
<td>33%</td>
</tr>
<tr>
<td>Moderately important</td>
<td>40%</td>
<td>43%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Neutral or unimportant</td>
<td>27%</td>
<td>14%</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Weber Shandwick’s Food Forward Trends Report 2014 identifies and compares the latest food trends that are predicted to shape the food culture in China, Korea, Singapore and Australia, during the year. A polling of 3250 adult consumers was conducted online via research companies’ Qualtrics and Pure Profile. Leading food experts, including food editors, chefs, bloggers and nutritionists, were also interviewed by Weber Shandwick in December 2013. For more information about the regional study visit: www.webershandwick.asia/foodforward

Weber Shandwick is a leading global public relations firm with offices in 81 countries. The firm’s diverse team of thinkers, strategists, analysts, producers, designers, developers and campaign activators has won the most prestigious awards in the world for innovative, creative approaches and impactful work, including being honored as a 2014 Ad Age A-List Agency, Mumbrella’s 2014 Asia Pacific PR Network of the Year and winning four 2013 Cannes Lions. Weber Shandwick was also named PRWeek’s International Consultancy of the Year and The Holmes Report’s Best Healthcare Consultancy in the World and Asia Pacific Digital Consultancy of the Year in 2013, in addition to earning numerous best place to work accolades. The firm deploys deep expertise across sectors and specialty areas, including consumer marketing, corporate reputation, healthcare, technology, public affairs, financial services, corporate social responsibility, financial communications and crisis management, using proprietary social, digital and analytics methodologies. Weber Shandwick is part of the Interpublic Group (NYSE: IPG). For more information, visit http://www.webershandwick.com or http://www.webershandwick.asia.

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