



Rice Eating Occasions

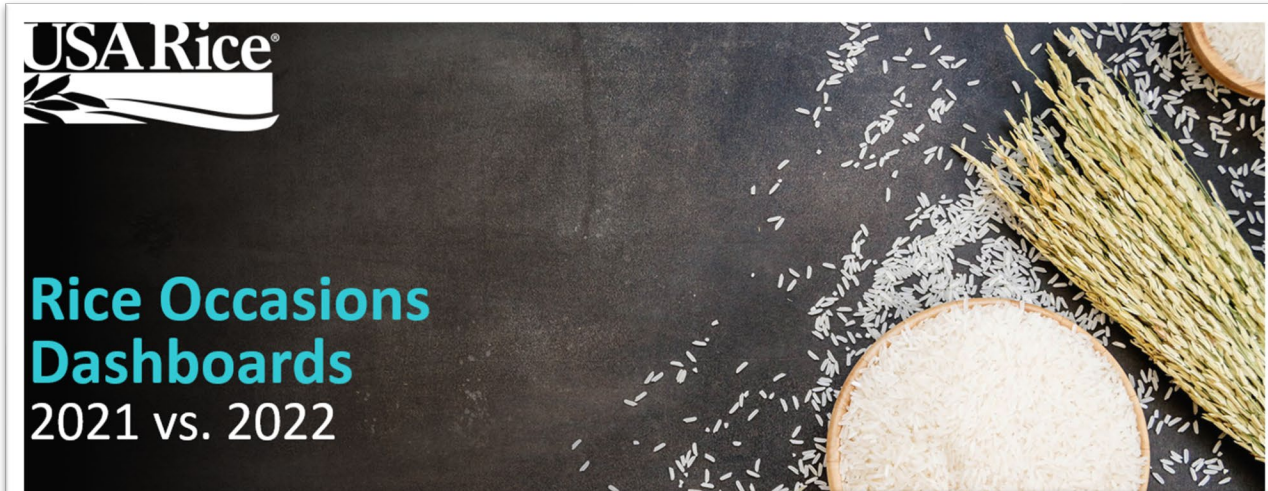


Agenda

- Research Methodology
- Rice Eater Demographics
- Key Attitudes and Motivators
- Emotions and Need States
- Kid and Teen Rice Occasions



Parameters of Research



..... Profile of Rice Eaters

..... Who, What, Where, When, Why

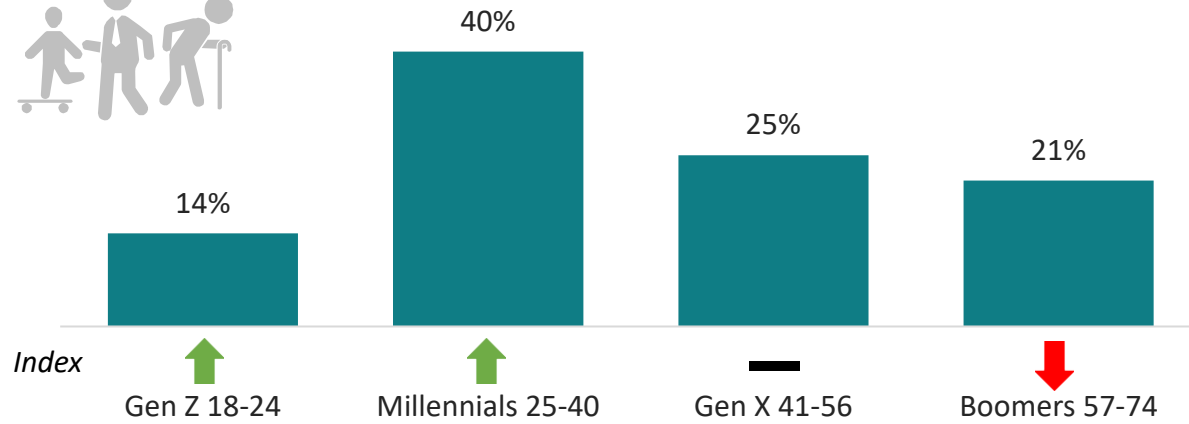


..... 190,000+ Data Points

RICE OCCASIONS: DEMOGRAPHICS



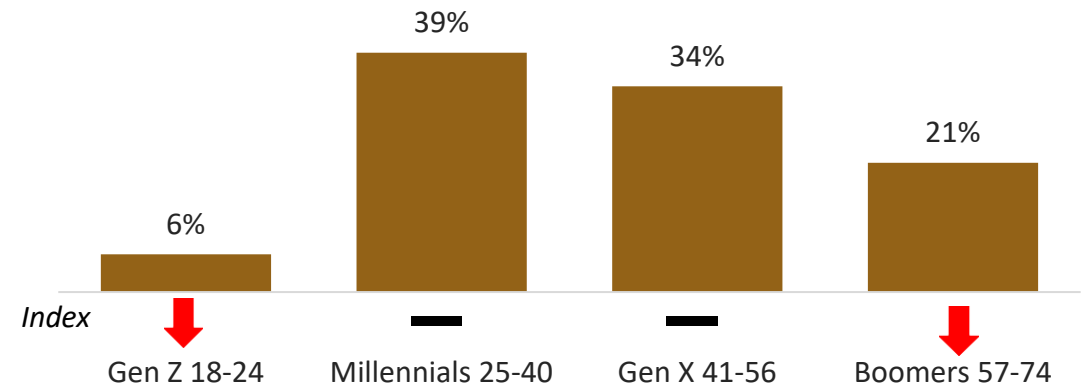
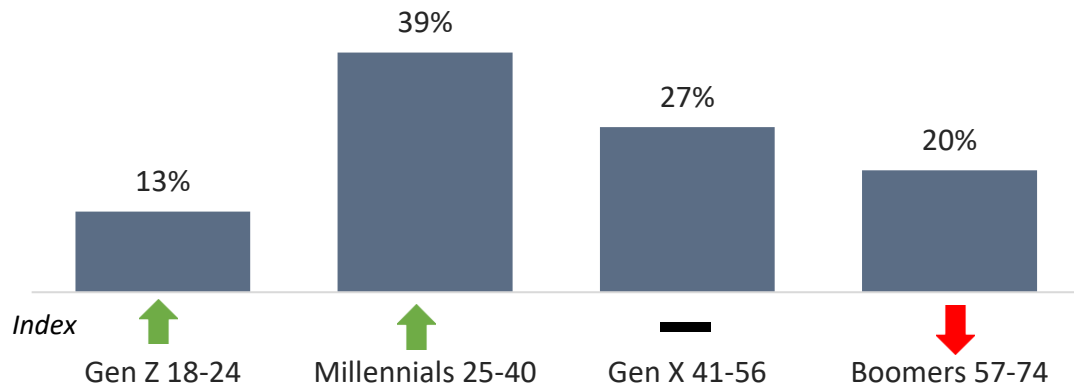
GENERATION



EDUCATION

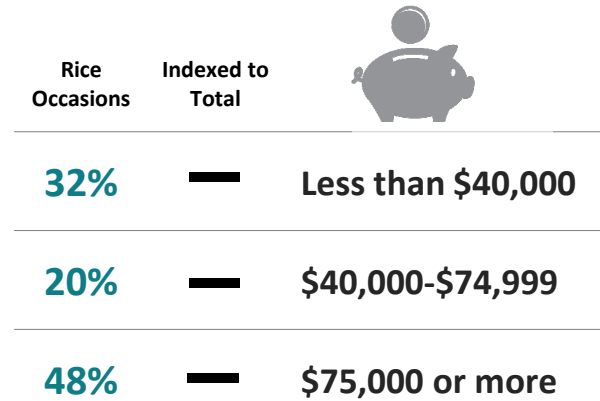


Rice Occasions	Indexed to Total
31%	High school or less
7%	Some college
62%	College grad

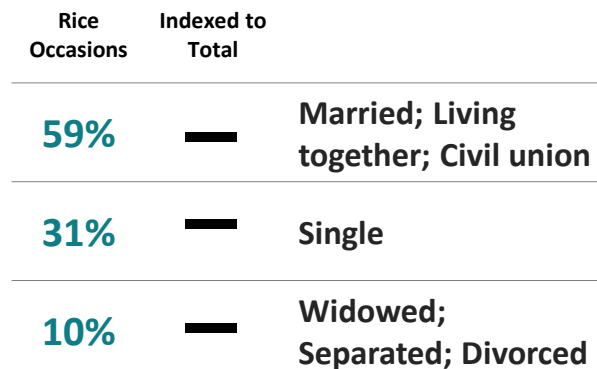


KID RICE OCCASIONS: DEMOGRAPHICS

INCOME

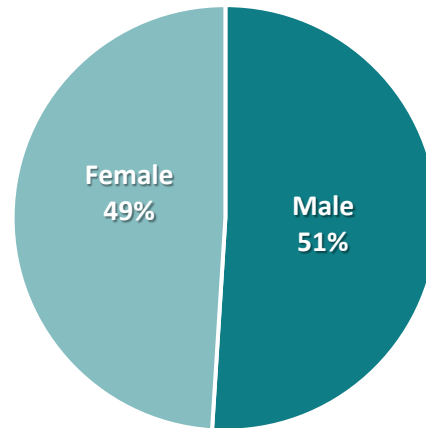


MARITAL STATUS



GENDER

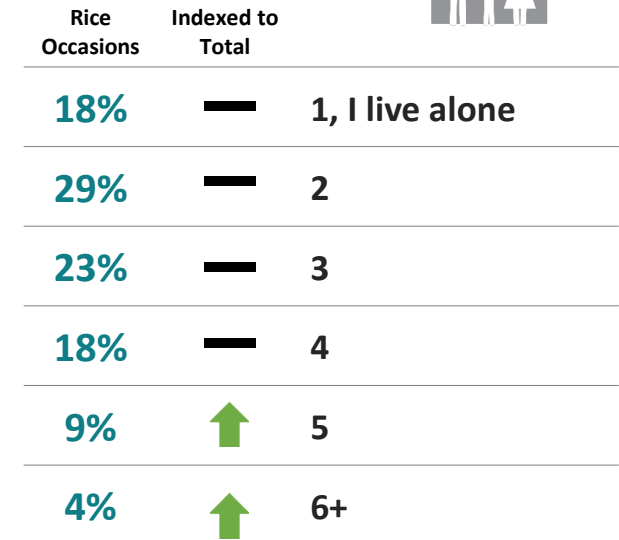
Indexed to Total F&B Occasions



HOUSEHOLDS WITH CHILDREN

36%

HOUSEHOLD SIZE

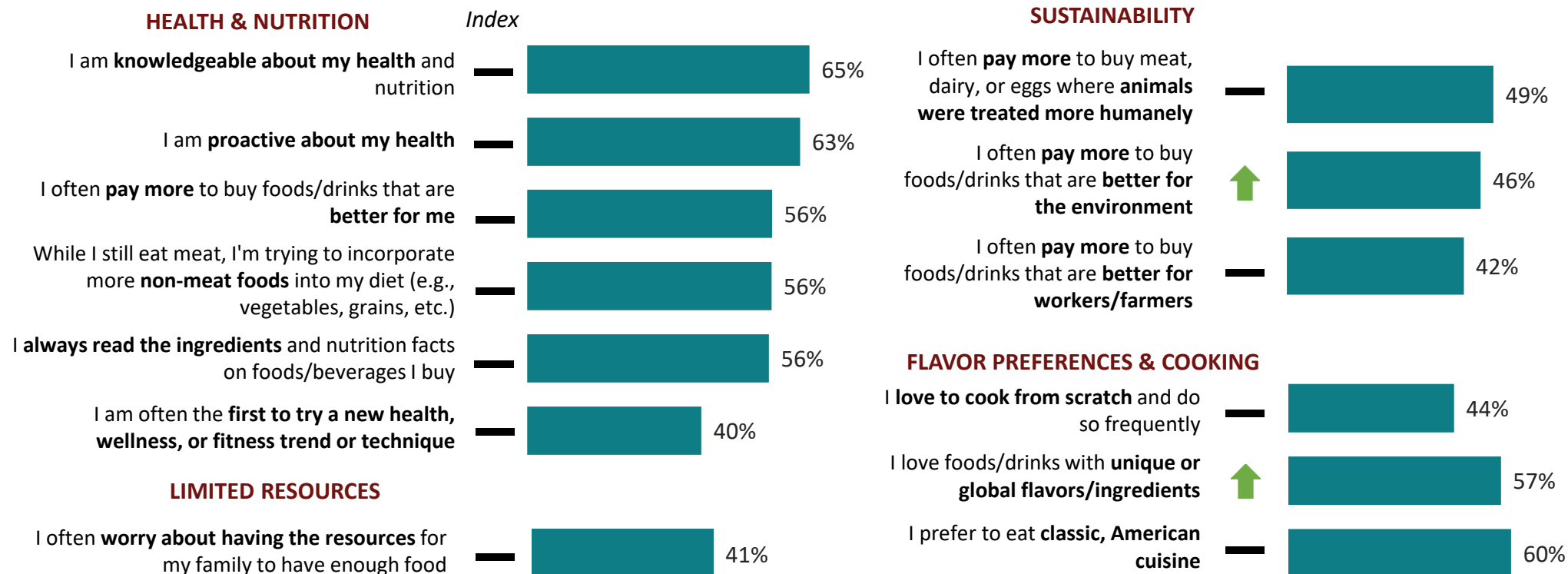


Rice occasions are also more likely to be among larger (5-6) person households when compared to total occasions.

RICE OCCASIONS: ATTITUDES, BELIEFS & BEHAVIORS

KEY ATTITUDES, BELIEFS & BEHAVIORS OF CONSUMERS WHO PARTICIPATE IN RICE OCCASIONS

Top 2 Box – Agree Strongly/Somewhat, Indexed to Total Occasions



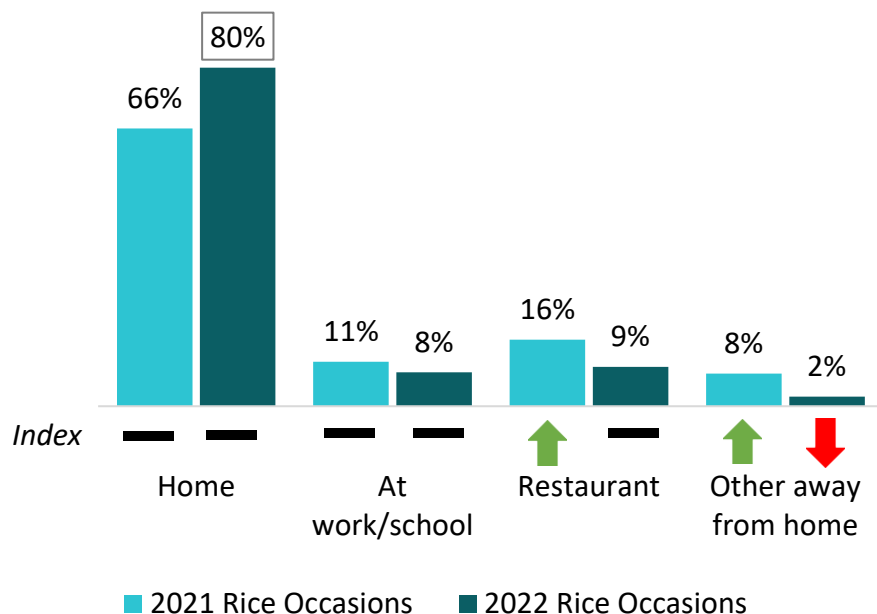
Over 4 in 10 rice consumers are willing to pay more to support some type of sustainability effort or to support their personal health. However, a similar amount are concerned about having enough resources/food for their family. This underscores the importance of ensuring accessible healthy and sustainable food for all.



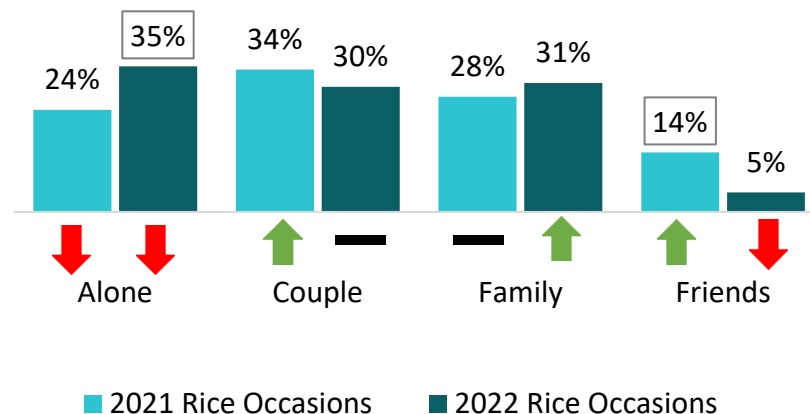
Rice Occasions 2021 vs 2022

RICE OCCASIONS: WHO, WHERE, AND WHEN

WHERE OCCASION TOOK PLACE



WHO WAS PRESENT

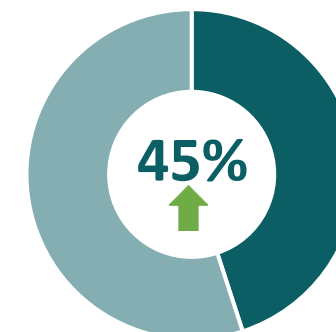


2022 RICE OCCASIONS

67%

TAKE PLACE DURING THE WEEK

2022 LEFTOVERS

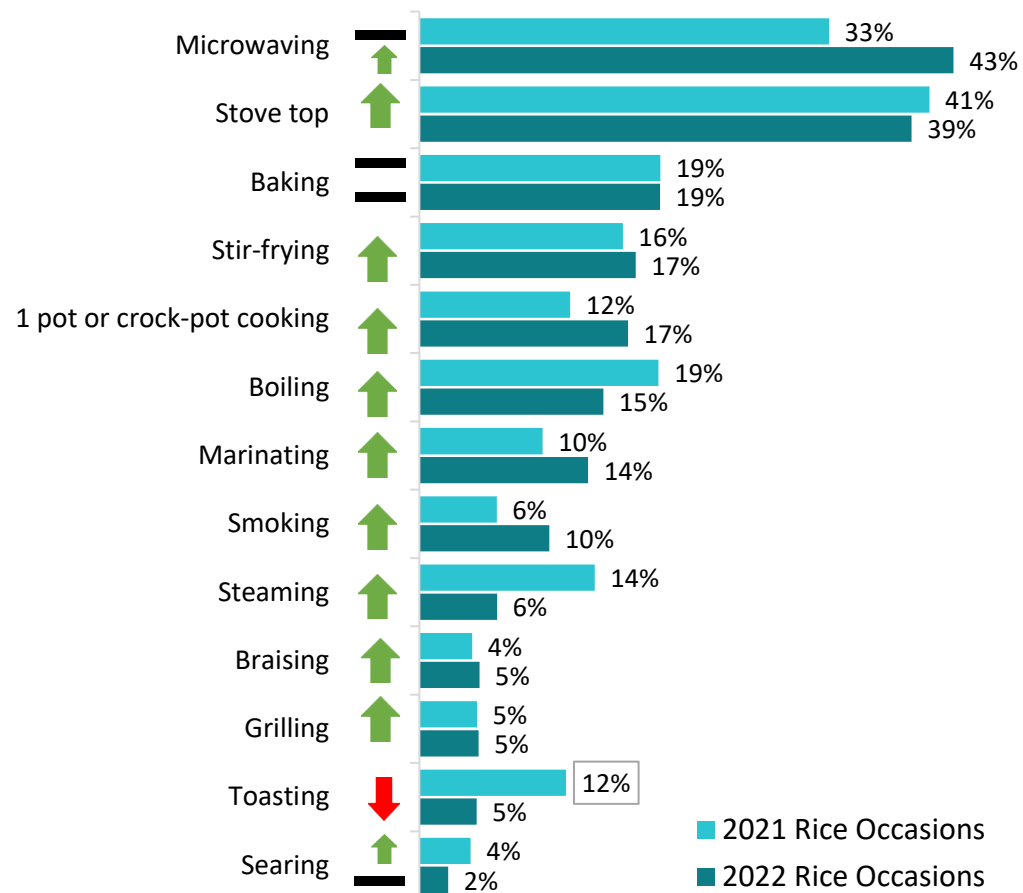


As many consumers have resumed pre-pandemic routines and activities the share of rice occasions that took place alone in 2022 has increased and closely resembles pre-pandemic levels (34% in 2019). The increase in alone eating, along with a drop in eating with friends, has also contributed to an increase in rice occasions that take place at home.

RICE OCCASIONS: PREPARATIONS METHOD, RICE TYPE

TOP PREPARATION METHODS

Among rice occasions that involve heating/cooking



TYPES OF RICE CONSUMED

2021 Rice Occasions	2022 Rice Occasions	Rice Type
55%	54%	White rice
24%	30%	Brown rice
19%	19%	Flavored rice
27%	17%	Rice & beans

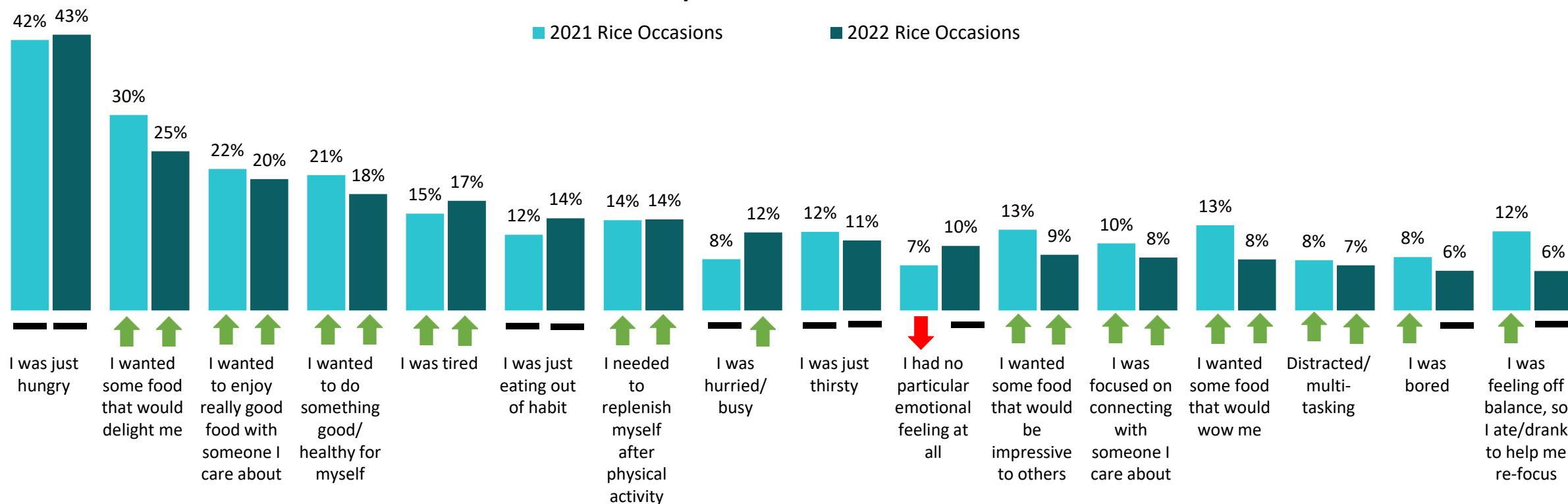
Rice occasions are more likely to involve a range of cooking methods relative to total occasions, including microwaving, stove top, stir-frying, 1 pot cooking, boiling and steaming – all common preparations for rice and rice-based dishes.

Closely linked to the greater levels of cooking and restaurant sourcing involved in rice occasions, leftovers are also more likely to be used when compared to total occasions. Oftentimes, consumers will intentionally order more from foodservice or prepare more when cooking to have leftovers.

RICE OCCASIONS: EMOTIONAL CONTEXT

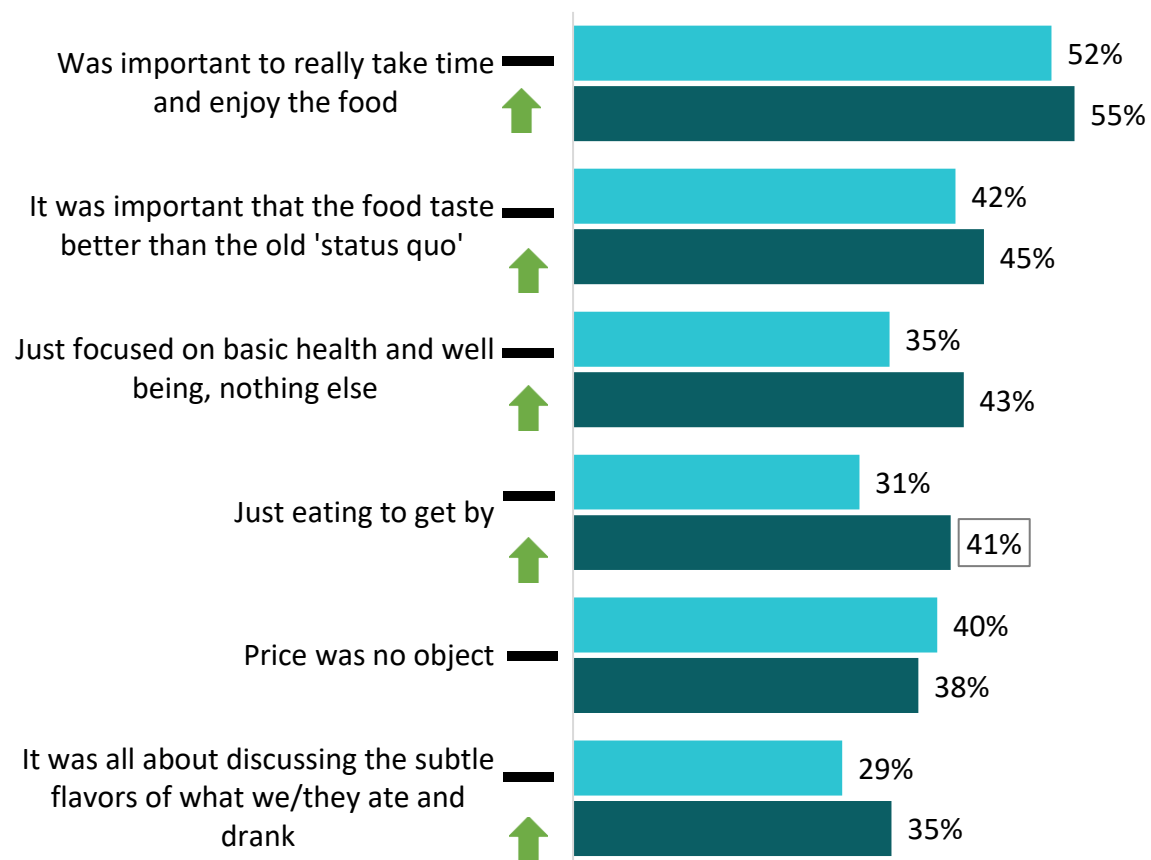
Hunger continues to be the top emotion on rice occasions in 2022, yet there are also a variety of other emotions present, ranging from the enjoyment of food and being with others, to more functional desires such as replenishment and focus. In addition, other more mundane feelings such as being tired and busy are also more likely to be present on rice occasions when compared to total occasions.

TOP EMOTIONS/FEELINGS ON RICE OCCASIONS

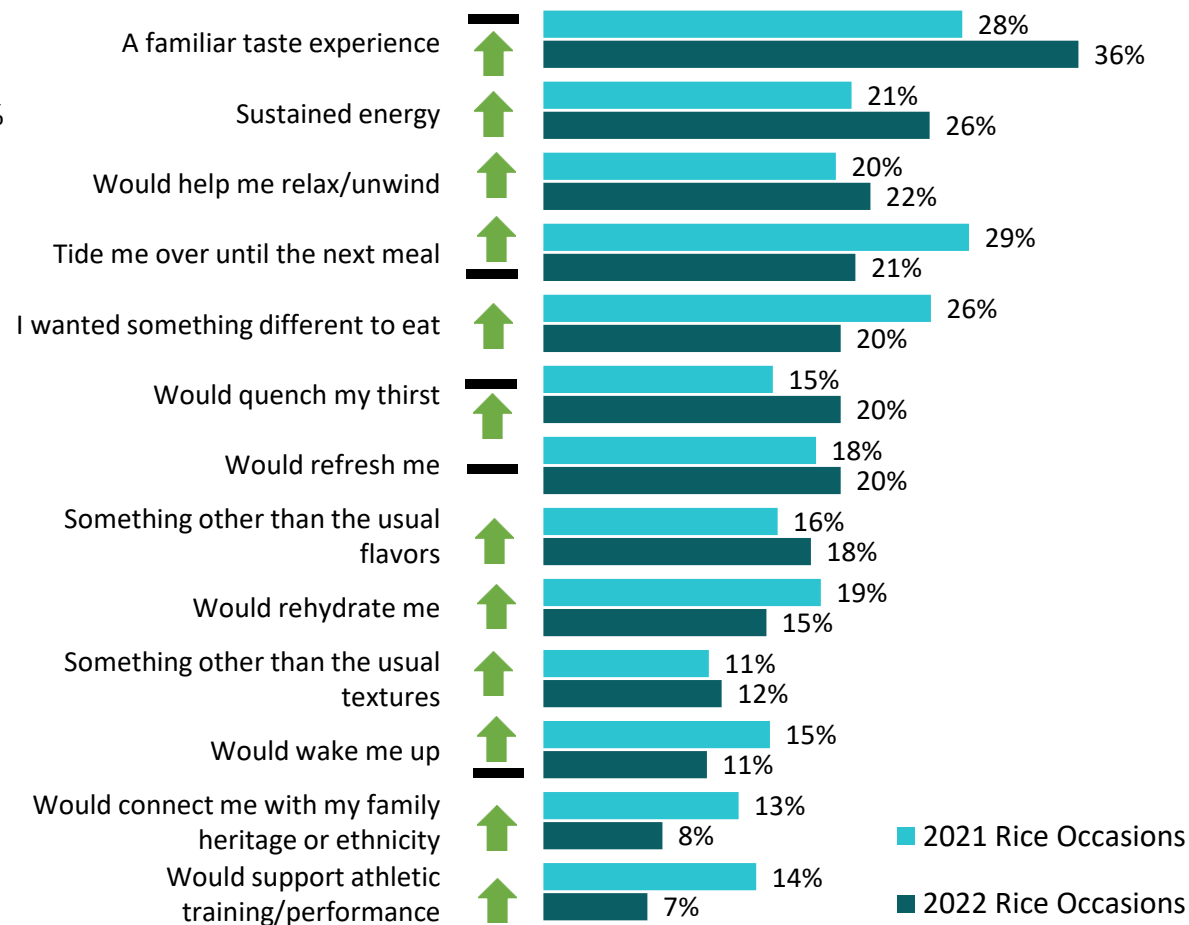


RICE OCCASIONS: CHARACTERISTICS & ATTRIBUTES

CHARACTERISTICS OF RICE OCCASIONS



IMPORTANT FOOD & BEVERAGE ATTRIBUTES

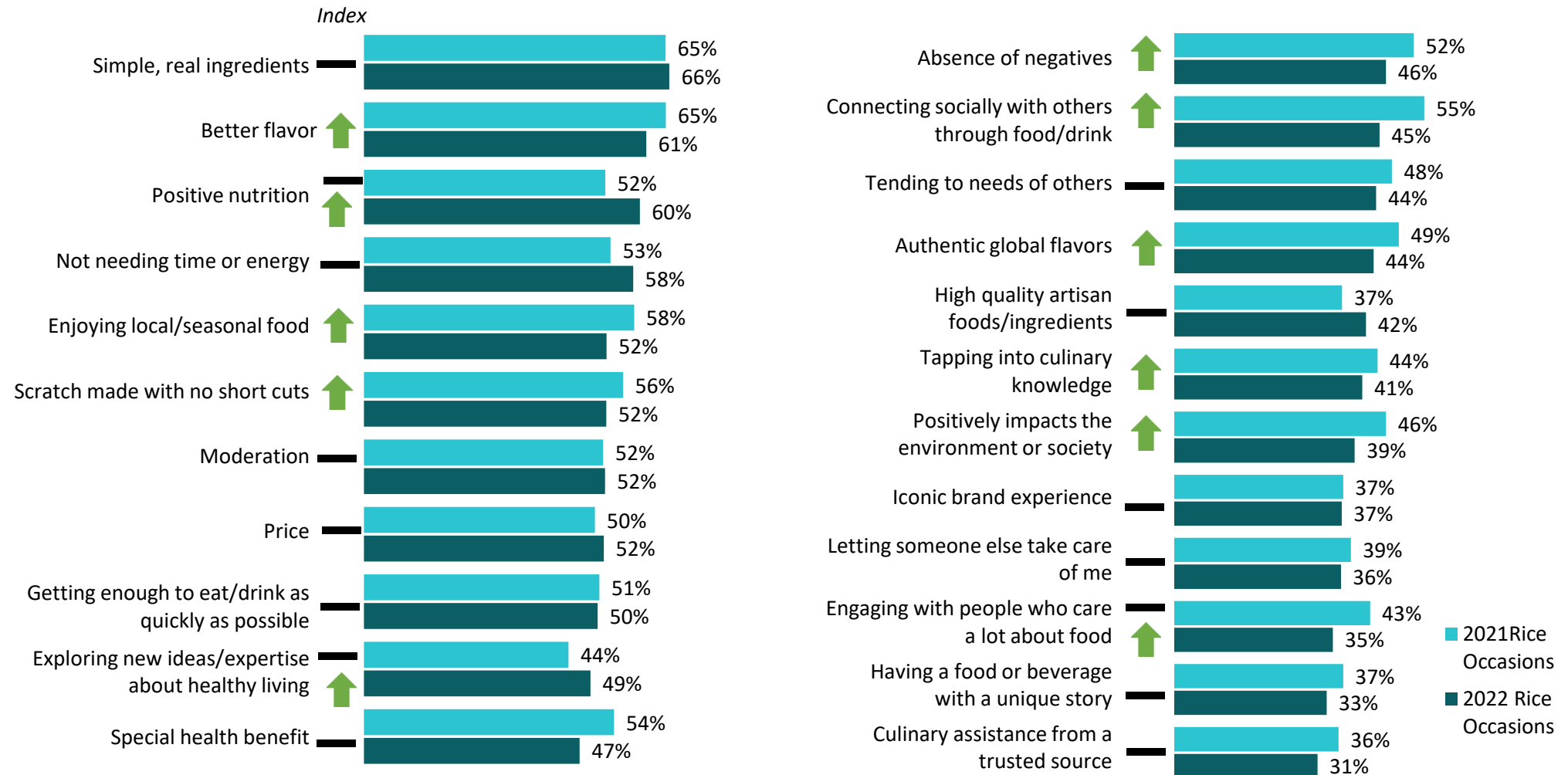


■ 2021 Rice Occasions
■ 2022 Rice Occasions

RICE OCCASIONS: NEED STATES

NEED STATES ON RICE OCCASIONS

Top 2 Box, Important Considerations



RICE SUBCATEGORY OCCASIONS: NEED STATES

TOP 10 NEED STATES ON RICE OCCASIONS

*Top 2 Box, Important Considerations
Indexed to Total Food & Beverage Occasions*

WHITE RICE	%	Index
Simple, real ingredients	66%	—
Better flavor	62%	↑
Scratch made with no short cuts	59%	↑
Price	54%	—
Not needing time or energy	53%	—
Positive nutrition	52%	—
Enjoying local/seasonal food	51%	↑
Special health benefit	51%	—
Moderation	50%	—
Connecting socially with others through food/drink	49%	↑

BROWN RICE	%	Index
Simple, real ingredients	76%	↑
Moderation	67%	↑
Not needing time or energy	65%	—
Positive nutrition	65%	↑
Enjoying local/seasonal food	64%	↑
Better flavor	64%	↑
Price	63%	↑
Special health benefit	62%	↑
Absence of negatives	60%	↑
Exploring new ideas/expertise about healthy living	59%	↑

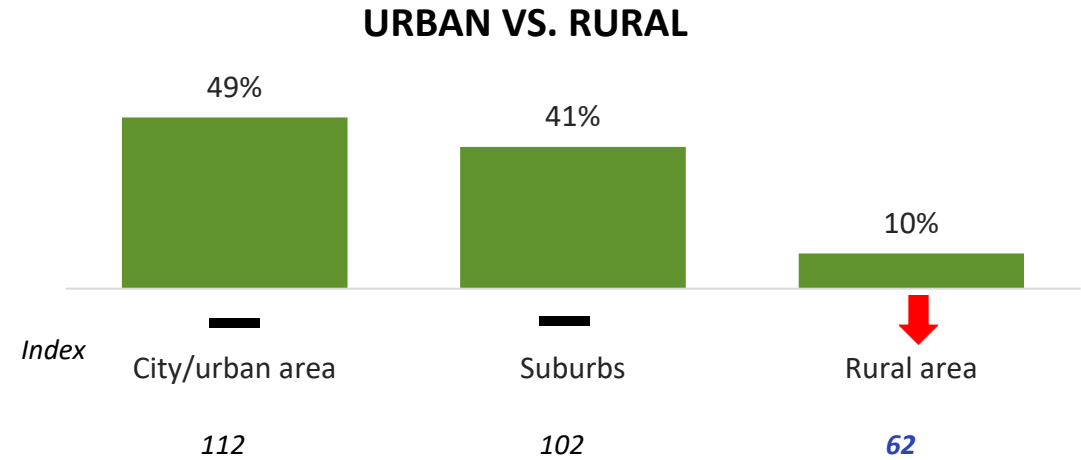
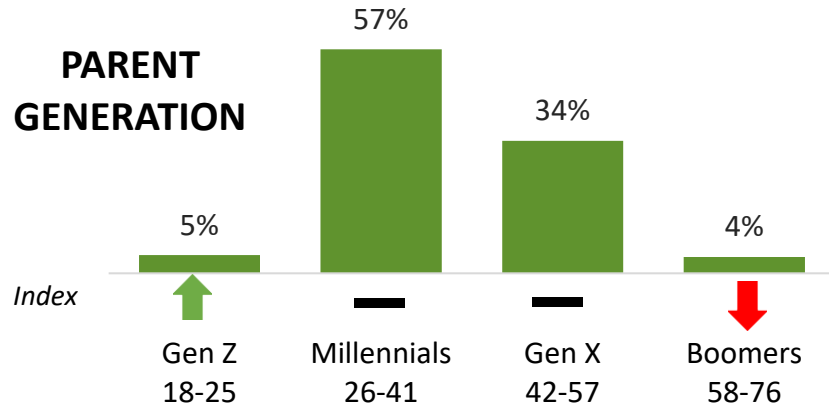
FLAVORED RICE	%	Index
Better flavor	68%	↑
Simple, real ingredients	67%	—
Getting enough to eat/drink as quickly as possible	63%	↑
Not needing time or energy	63%	—
Scratch made with no short cuts	62%	↑
Positive nutrition	62%	↑
Connecting socially with others through food/drink	61%	↑
Price	59%	↑
Enjoying local/seasonal food	58%	↑
Authentic global flavors	57%	↑

For all three rice sub-categories having **real, simple ingredients** is among the top 2 most important needs. However, beyond this, there are key differences depending on the type of rice consumed.

Kid & Teen Rice Occasions



KID RICE OCCASIONS: DEMOGRAPHICS



PARENT INCOME



Kid Rice Occasions	Index	Income Level
30%	—	Less than \$40,000
25%	—	\$40,000 to \$74,999
46%	—	\$75,000 or more

KID AGE

6.7 years

Average age of child participating in rice occasions (99 index)

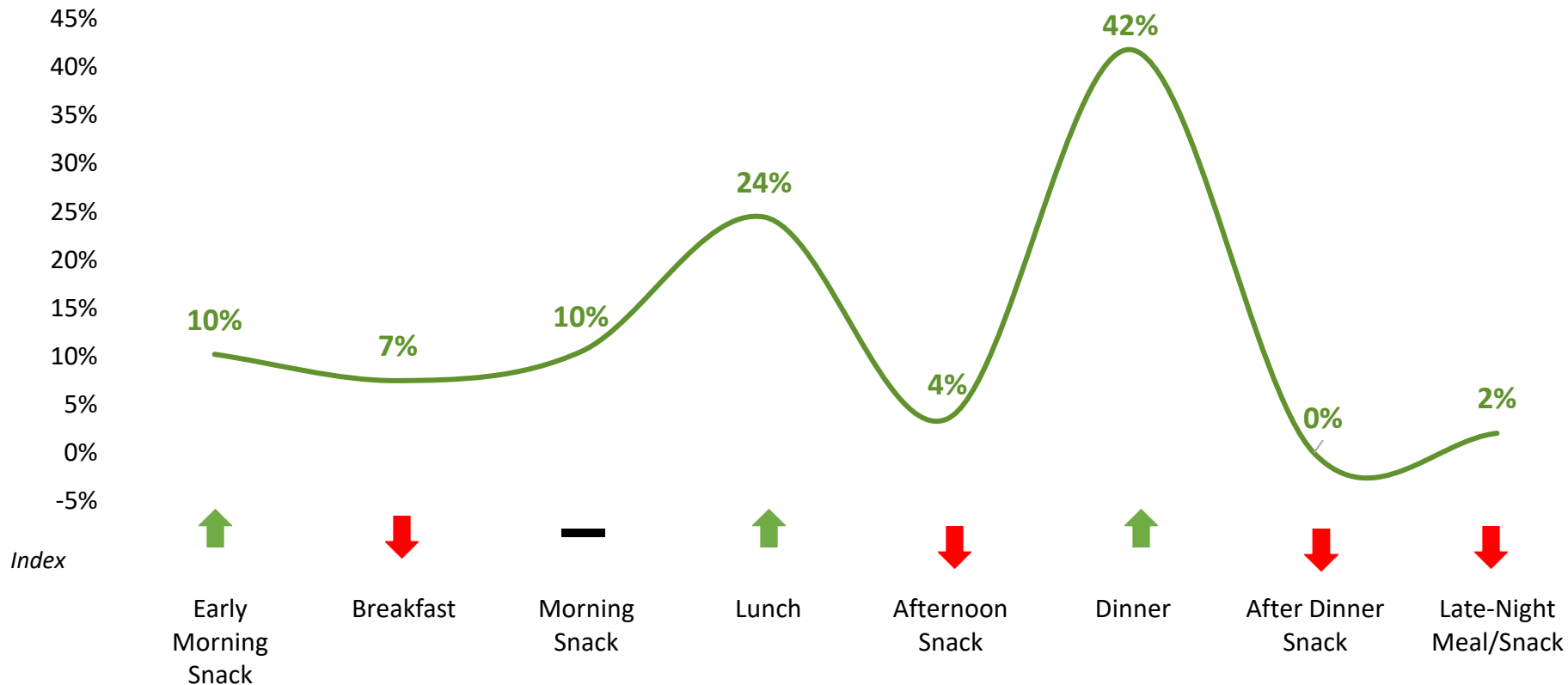
VARIETIES OF RICE CONSUMED ON KID RICE OCCASIONS

Kid Rice Occasions	Percentage	Variety
56%	56%	White rice
31%	31%	Brown rice
25%	25%	Rice & beans
25%	25%	Flavored rice

KID RICE OCCASIONS: DAYPART

Almost three-quarters of all kid rice occasions take place during meals, with most of these taking place during dinnertime. Kid rice occasions are less likely to take place during breakfast, afternoon snack and after dinner snack times, but are more likely to take place as an early morning snack when compared to total kid occasions.

KID RICE OCCASIONS THROUGHOUT THE DAY



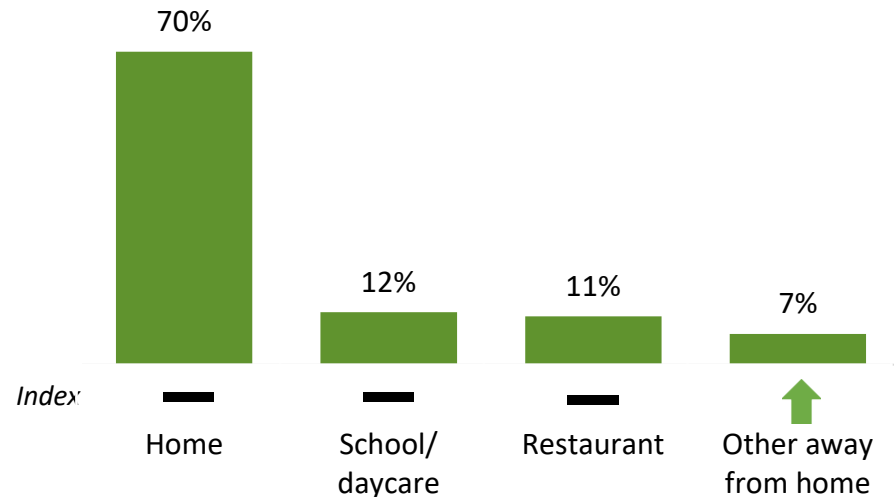
74%
of kid rice occasions take place during **MEALS**

26%
take place during **SNACKS**

KID RICE OCCASIONS: WHERE, WHEN, AND LEFTOVERS

Majority of kid occasions take place at home, but almost one-third of kid rice occasions take place away from home, which includes school/daycare, restaurant, and other away-from-home locations, with the latter being more common when compared to total kid occasions.

WHERE OCCASION TOOK PLACE

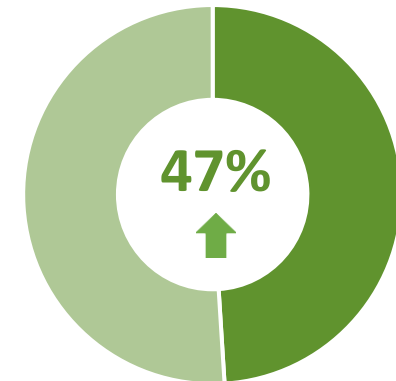


66%
of kid rice occasions take place during the WEEK

34%
take place during the WEEKEND*

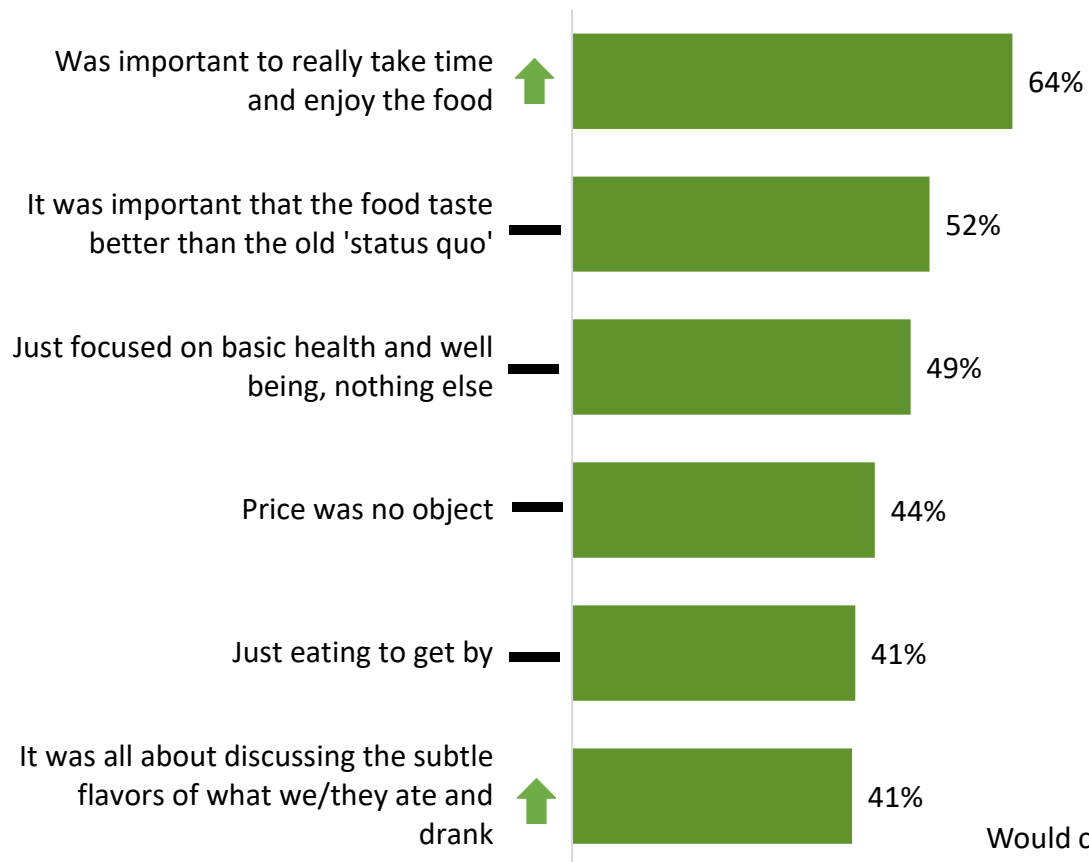
LEFTOVER CONSUMPTION

Share of all kid rice occasions that involved some/all leftovers



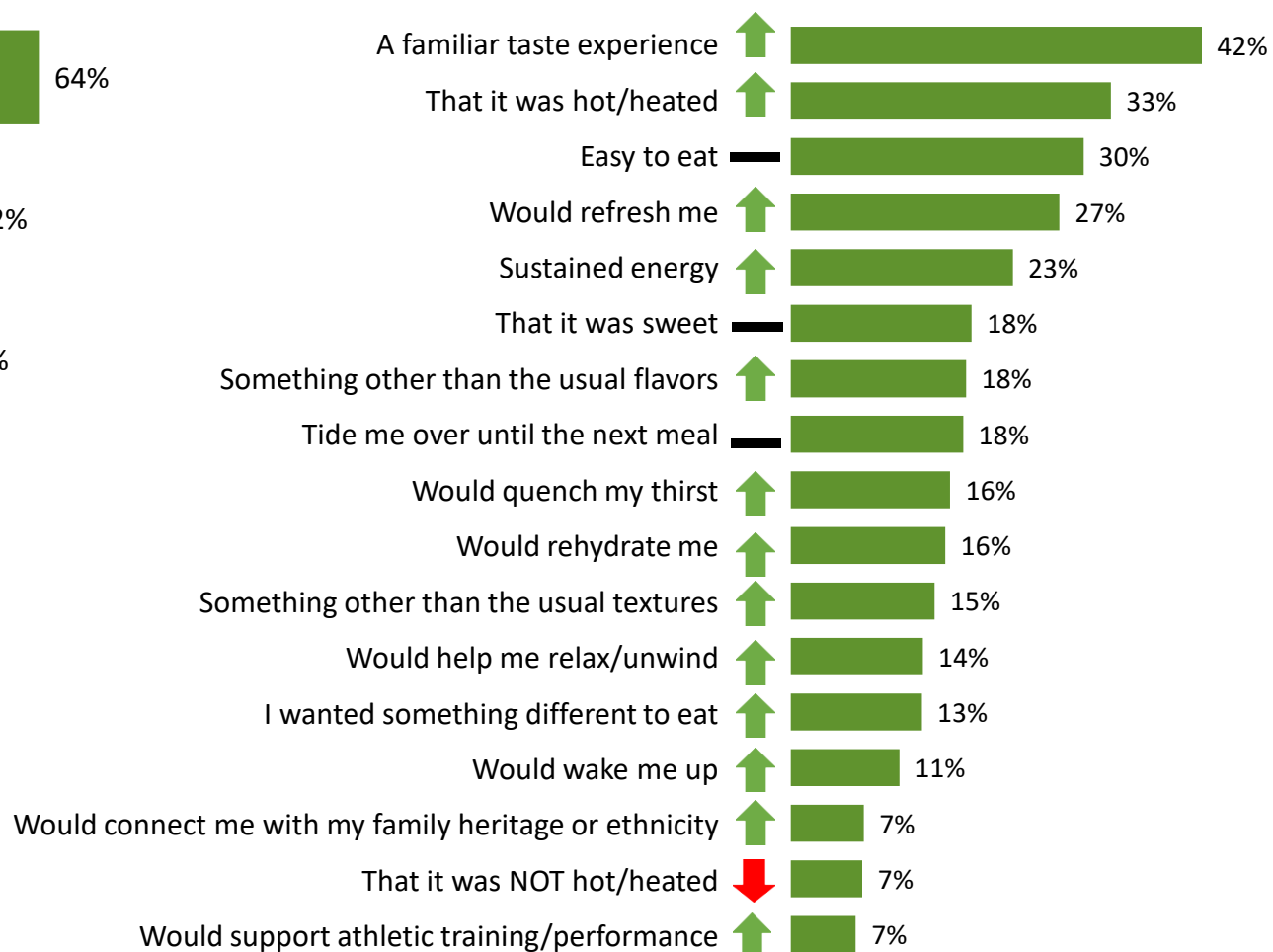
KID RICE OCCASIONS: CHARACTERISTICS & ATTRIBUTES

CHARACTERISTICS OF KID RICE OCCASIONS



IMPORTANT FOOD & BEVERAGE ATTRIBUTES

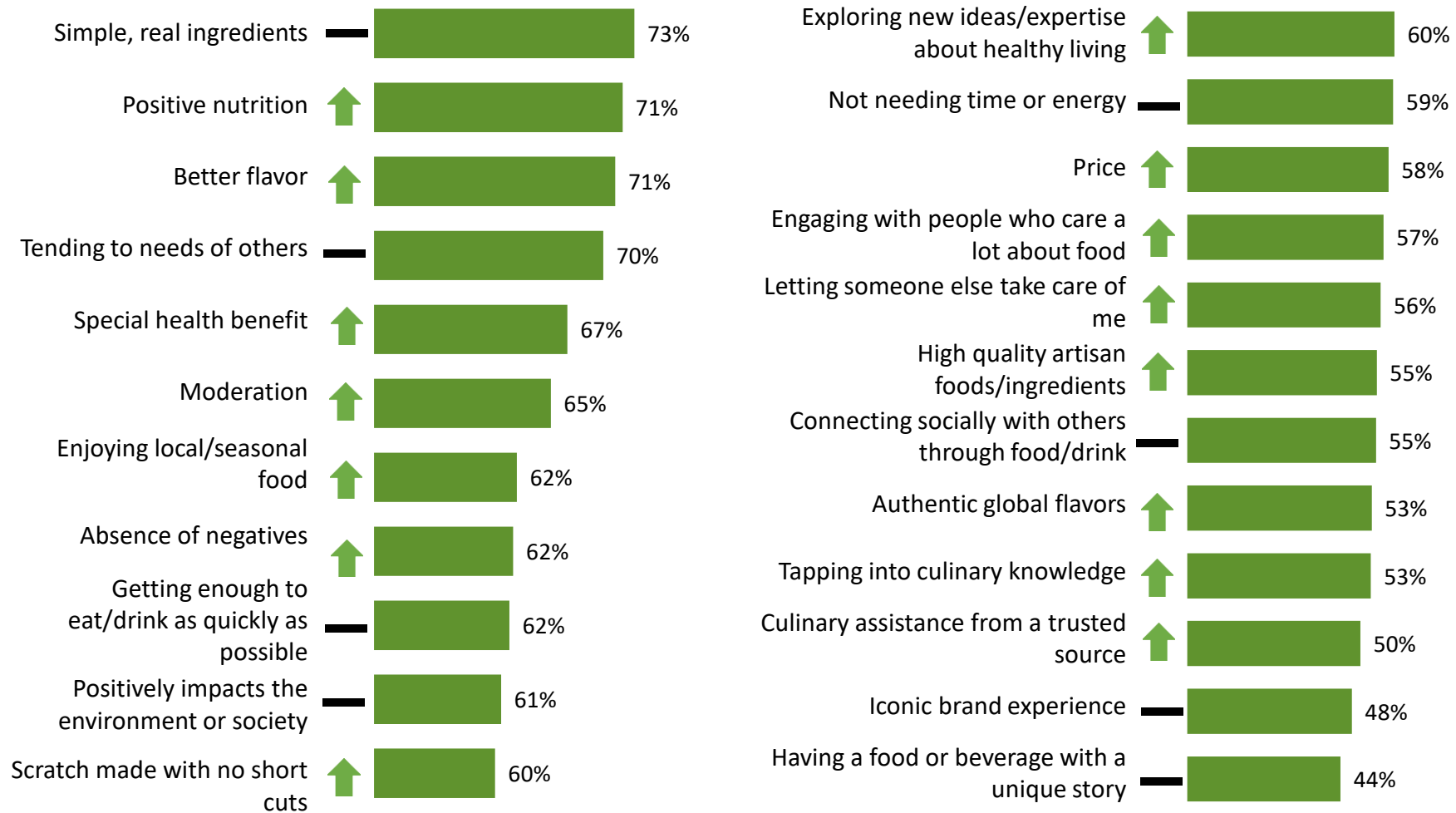
For parent or child on kid rice occasions



KID RICE OCCASIONS: NEED STATES

NEED STATES OF PARENTS ON KID RICE OCCASIONS

Top 2 Box, Important Considerations



Kid rice occasions are more likely than total kid occasions to involve a wide variety of needs, pointing towards the role of rice as an important ingredient in many “high stakes” meals.

Premium-oriented needs, such as having local/seasonal foods, artisan ingredients, authentic global flavors, and a unique brand narrative are also more likely to be present on these occasions,.

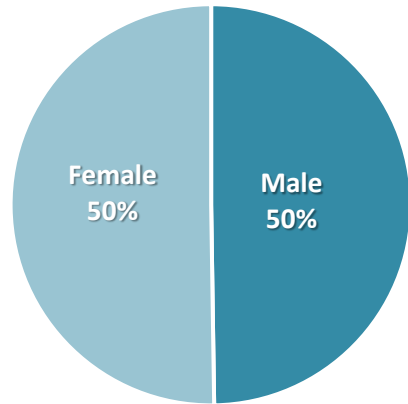


Teen (13-17) Rice Occasions

TEEN RICE OCCASIONS: DEMOGRAPHICS

GENDER

Indexed to Total F&B Occasions



AVERAGE AGE

14.9

Average age of teenager participating in rice occasions (100 Index)

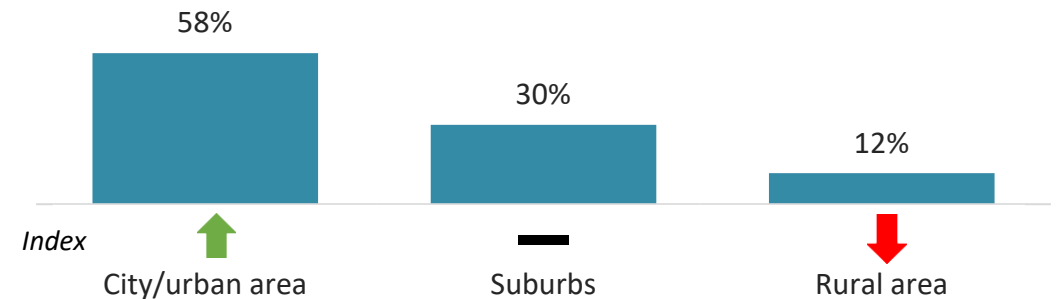
HOUSEHOLD INCOME

Teen Rice Occasions	Index	Income Category
23%	—	Less than \$40,000
16%	↓	\$40,000-\$74,999
61%	—	\$75,000 or more

VARIETIES OF RICE CONSUMED ON TEEN RICE OCCASIONS

Teen Rice Occasions	Percentage	Rice Variety
58%	58%	White rice
33%	33%	Flavored rice
31%	31%	Rice & beans
26%	26%	Brown rice

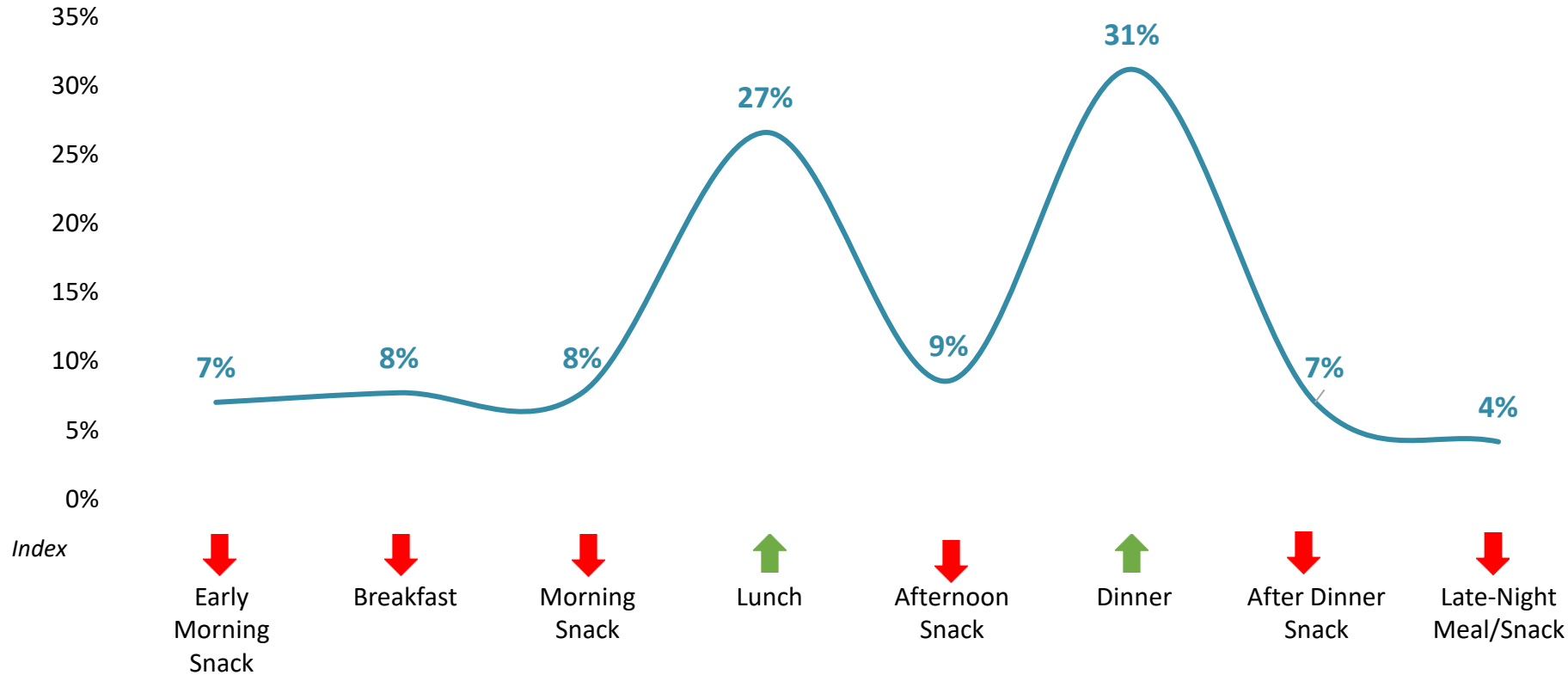
URBAN VS. RURAL



TEEN RICE OCCASIONS: DAYPARTS

Almost two-thirds of teen rice occasions take place during meals, over-indexing during lunch and dinner versus total teen occasions. Almost one-third taking place during dinner, yet, unlike kid (and adult) occasions the difference between lunch and dinner time consumption is very small (only 5pp). Rice is less likely to be consumed during breakfast or snacking times compared to total teen occasions.

TEEN RICE OCCASIONS THROUGHOUT THE DAY



65%
of teen rice occasions take place during **MEALS**

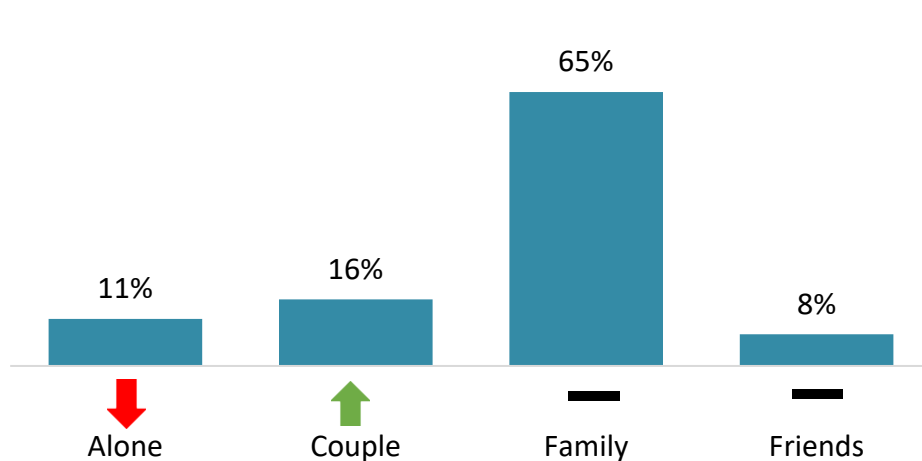
35%
take place during **SNACKS**

TEEN RICE OCCASIONS: WHO & WHERE

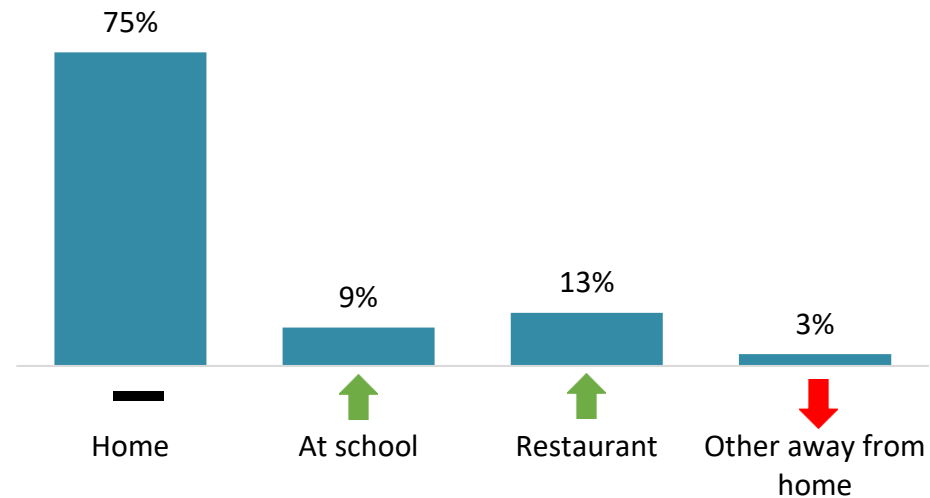
Compared to teen occasions overall, teen rice occasions are less likely to take place alone and at other away from home locations (e.g., while on the go, at a park, sporting event, church, etc.). These patterns align with rice's stronger presence on lunch and dinner occasions.

Similar to total occasions, just over two-thirds of teen rice occasions take place during the week.

WHO WAS PRESENT



WHERE OCCASION TOOK PLACE

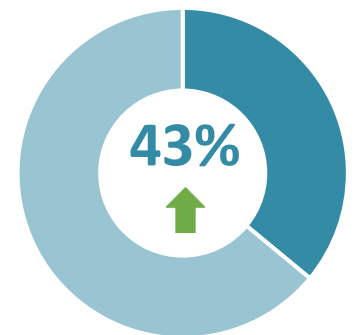


67%

of teen rice occasions take place during the WEEK

LEFTOVERS

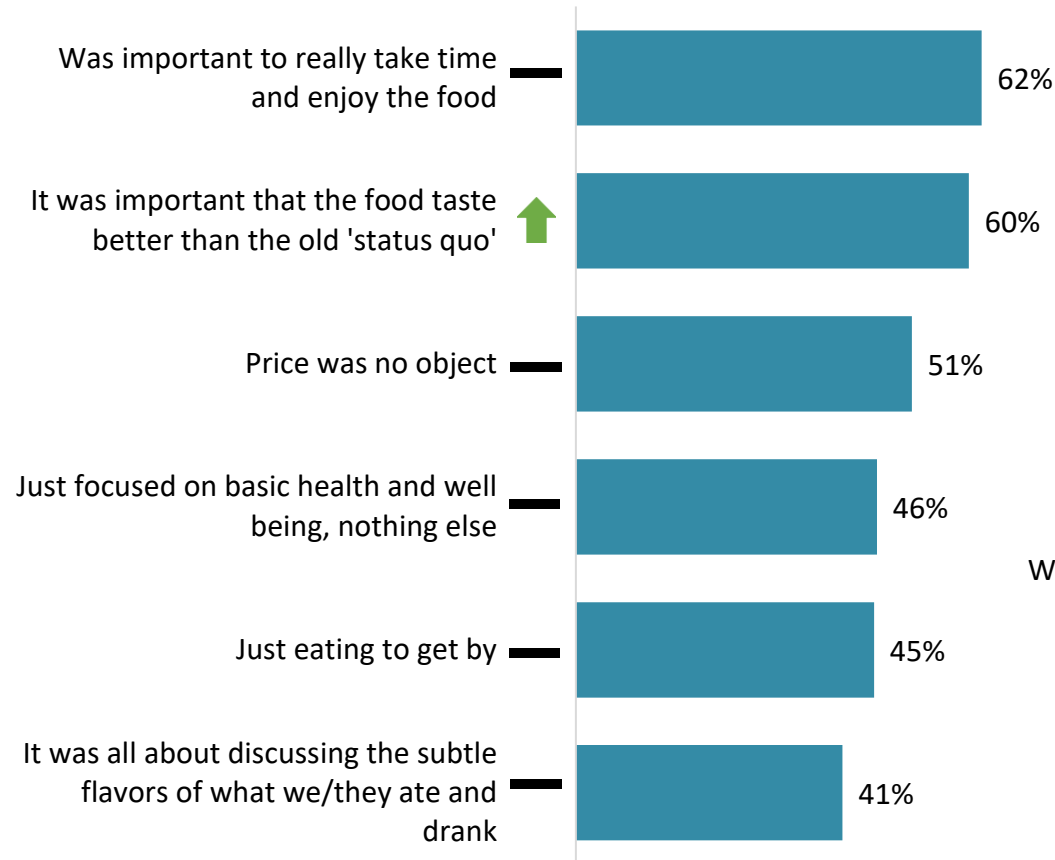
Share of total teen rice occasions that involve all/some leftovers



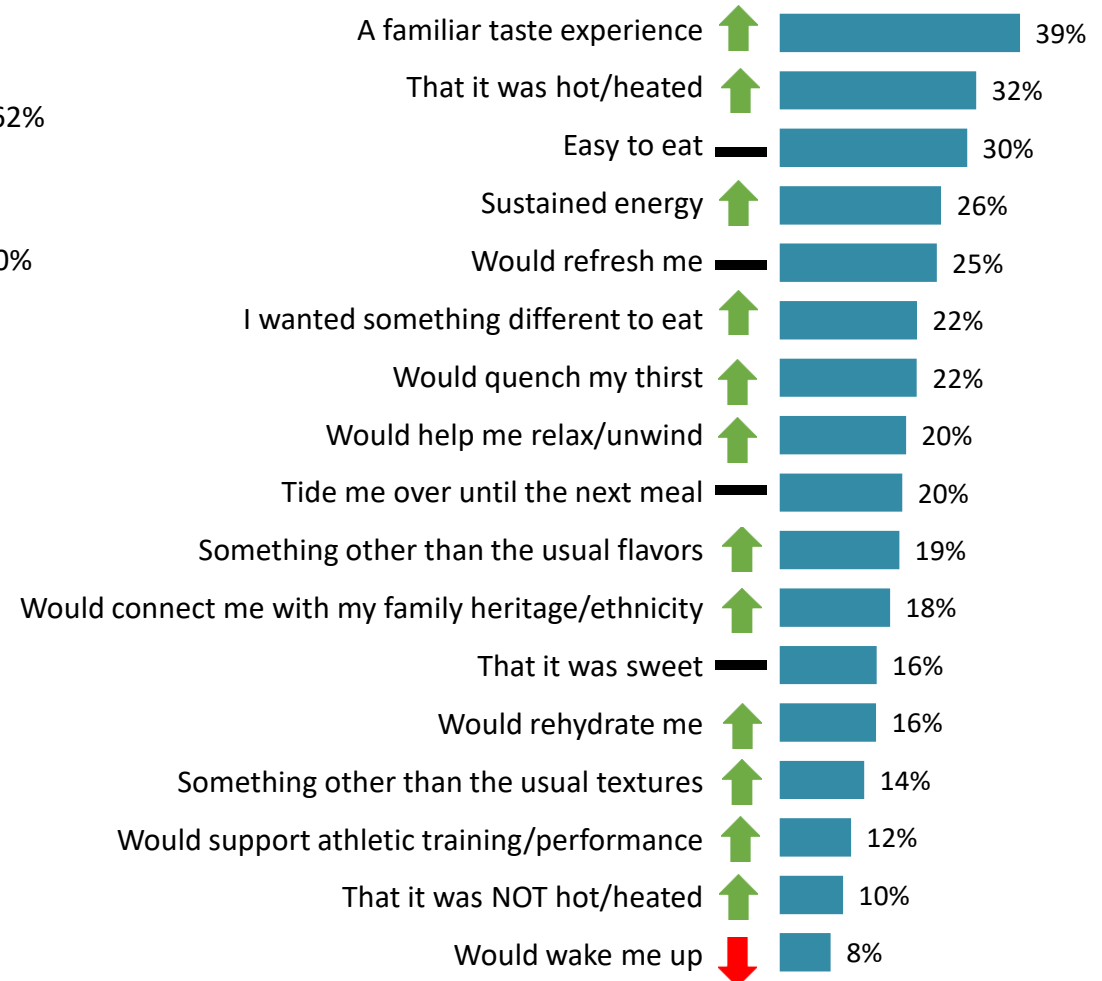
TEEN RICE OCCASIONS: CHARACTERISTICS & ATTRIBUTES

CHARACTERISTICS OF TEEN RICE OCCASION

Top 2 Box, Describes Well



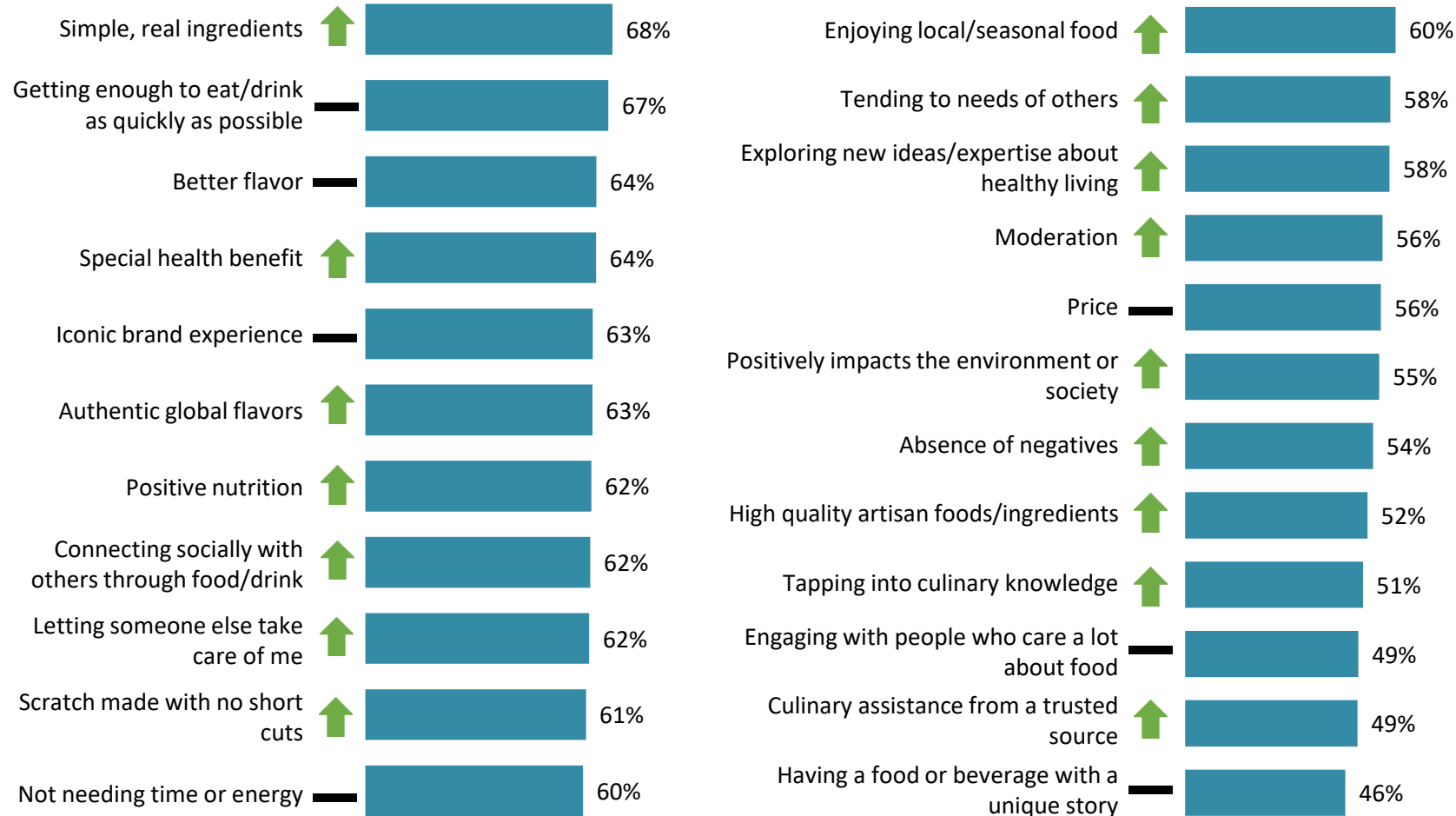
IMPORTANT FOOD & BEVERAGE ATTRIBUTES ON TEEN RICE OCCASIONS



TEEN RICE OCCASIONS: NEED STATES

NEED STATES ON TEEN RICE OCCASIONS

Top 2 Box, Important Considerations



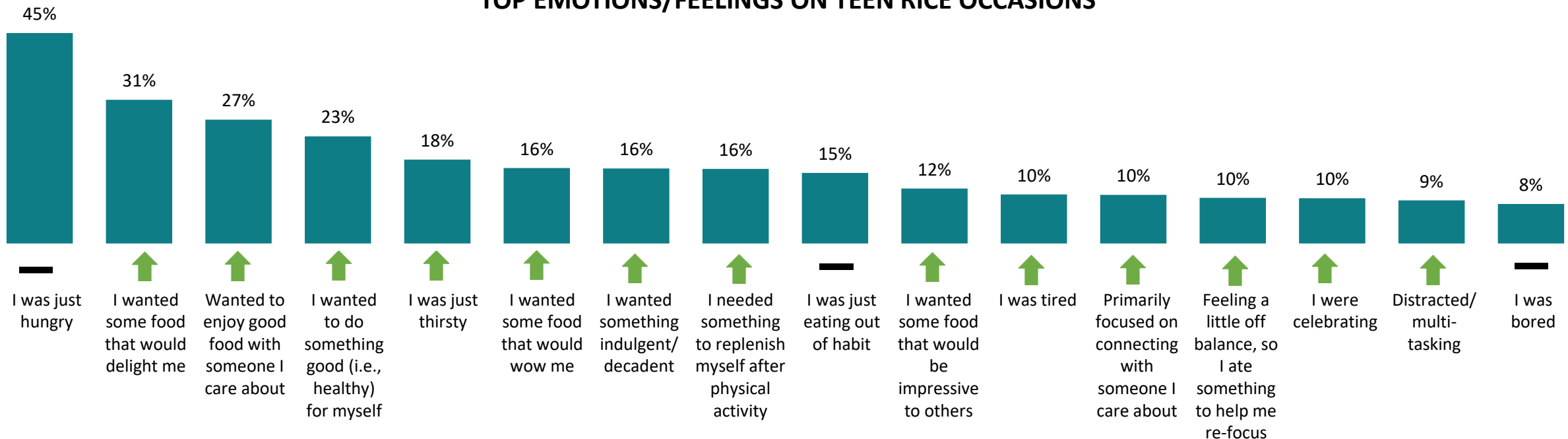
Teens tend to have higher expectations on rice occasions relative to total teen occasions, with a variety of needs over-indexing. Having simple ingredients, functional health benefits, authentic global flavors, nutrition, social connection, and scratch cooking are all more important needs, present on over 6 in 10 teen rice occasions.

In addition, other premium-oriented needs such as having local/seasonal food, sustainability and artisan ingredients also over-index on teen rice occasions relative to total teen occasions.

TEEN RICE OCCASIONS: EMOTIONS

Teen rice occasions over-index on emotions related to delight, the social sharing of food, and wanting to do something good for oneself, which highlight the role of rice as a social meal component that often involves a variety of cuisines. In addition, rice is also seen as a component of healthy meals, with these occasions also over-indexing when physical replenishment and mental focus are important.

TOP EMOTIONS/FEELINGS ON TEEN RICE OCCASIONS



Key Takeaways

- Return to Pre-Pandemic Habits
- Convenience Prioritized
- Appreciation of Rice's Adaptability
- Positive Consumer Emotions
- Component of a Healthy Diet



Thank You

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Rice Eating Occasions Reports
at usarice.com