

AGENCY FOR INTERNATIONAL DEVELOPMENT WASHINGTON, D. C. 20523 BIBLIOGRAPHIC INPUT SHEET		FOR AID USE ONLY Batch 58
1. SUBJECT CLASSI- FICATION	A. PRIMARY Food production and nutrition B. SECONDARY Human nutrition--Korea	AS00-0000-G704
2. TITLE AND SUBTITLE Survey of bread consumption pattern in Seoul		
3. AUTHOR(S) (101) ASI Market Research Inc., Seoul, Korea		
4. DOCUMENT DATE 1976	5. NUMBER OF PAGES 65p.	6. ARC NUMBER ARC
7. REFERENCE ORGANIZATION NAME AND ADDRESS AID/ASIA/USAID/Korea		
8. SUPPLEMENTARY NOTES (<i>Sponsoring Organization, Publishers, Availability</i>)		
9. ABSTRACT		
10. CONTROL NUMBER PN-AAD-719		11. PRICE OF DOCUMENT
12. DESCRIPTORS Acceptability Bread Food consumption Food habits		13. PROJECT NUMBER 14. CONTRACT NUMBER AID/ASIA/USAID/Korea 15. TYPE OF DOCUMENT

**SURVEY OF
BREAD CONSUMPTION PATTERN
IN SEOUL**

**ASI Market Research Inc. (Korea)
August 30, 1976**

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Submitted to:

United States Mission - Korea

by

ASI Market Research Inc. (Korea)

August 30, 1976



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BACKGROUND AND OBJECTIVES

Sam Lip Food Industrial Co., Ltd. launched this summer a special program to introduce a soy-fortified bread, with the financial assistance of USAID, who originally conceived the idea of high-protein food program in the developing nations.

The major objective of this survey was to gather basic market information regarding the current bread consumption pattern in the test market area, which could serve as a basis for evaluating the results of the soy-bread test market program of Sam Lip.

Specifically, the study was intended to gather the following types of information.

1. Bread consumption pattern
2. Bread purchase pattern
3. Attitudes toward bread and other alternative foods
4. Demographic profile of bread users and non-users.



METHODOLOGY

In order to accomplish the objectives, a sample survey was conducted in Seoul, the test market area for the soy-bread.

Sample Design

A total of 750 households were selected at random, using the method of multi-stage probability sampling.

At the first stage, 30 Dongs were selected with probability proportional to the size of each Dong, from the geographical list of all 343 Dongs in Seoul.

At the second stage, 150 Tong-bans were also selected at random from the list of all 3,923 Tong-bans of 30 Dongs.

At the third stage, 5 households were selected systematically using an equal interval from the list of all households in each Tong-ban. Thus a total of 750 households were selected to represent the entire 1,400,000 households in Seoul. The respondent in the household was the housewife in all cases.



Of the 750 attack sample, the effective interviews were 600, with 4 households per Tong-ban.

Fieldwork

A total of 20 female interviewers were selected from the list of ASI's interviewers. All interviewers are university students, and have some experiences in social surveys.

Interviewers were given an orientation session covering:
(1) survey objectives, (2) interview technique, (3) respondent selection method, (4) questionnaire contents, and (5) practice interviews.

The interviewers reported to office at least every other day with completed questionnaires, which were daily edited by a field supervisor. In addition, an independent team of validators verified the accuracy and reliability of 10% of each interviewer's work.

The fieldwork was conducted between June 29th and July 5th, 1976.



Data Processing

All completed questionnaire were carefully coded and edited by ASI staff before being sent to a data processing center.

CDC CYBER 73-18 was used with SPSS Program in tabulating the results.



EXECUTIVE SUMMARY

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EXECUTIVE SUMMARY

I. BREAD CONSUMPTION PATTERN

1. About 1 out of 10 households in Seoul eat bread as a staple food at least several times a week, and about 1 out of 4 households do so at least once a week. The bread users are found more among the 30-39 years-old (housewife), upper-class families.
2. The main bread-users in the family are 5 to 14 years-old children.
3. The majority of present bread-users started eating bread within the past 4 years, upon the request of children.
4. On the basis of "most favorite brand", SAMLIP has 51% share, SEOUL has 23% share, INDIVIDUAL BAKERIES have 19% share, and CONTI has 7%. Also far more people prefer "milk bread" over "regular bread".
5. On the average, a bread-using family consume $3\frac{1}{2}$ bags of 15 slices in a week.



6. Most bread-users reported that they spread jam or butter on bread and eat it with eggs and milk.
7. For most of the heavy-users, there is no particular season when they eat bread more; however people tend to eat more bread during summer.
8. In about 3-out-of-10 cases, the children of the bread-users take bread to school for lunch instead of rice, at least once a week.
9. About 50% of all respondents said that they give "Pan" or pastries to their children as a snack at least several times a week.

II. BREAD PURCHASE PATTERN

10. In most cases, the housewife usually purchases bread at a neighborhood food store.
11. She usually buys one bag of 30 slices (450g) at one time.



III. ATTITUDES TOWARDS BREAD AND OTHER STAPLE FOODS

12. "Expensive" was the foremost reason people do not eat bread.

13. Women perceive rice as more "nutritious", "tasty", and "filling stomach" than bread or noodle. Bread is perceived as most "convenient", and noodle is regarded as most "economical".

It is important to note that even heavy users of bread consider rice to be more "tasty" and "filling stomach" than bread (but less nutritious and convenient).

14. About 40% of users thought that the taste of current bread has become poorer, compared to a year ago.

IV. CONSUMPTION OF OTHER STAPLE FOODS

15. On the average, the heavy users of bread consume about 17 bottles (180cc) of milk in a week, compared to 11 bottles for non-users.



16. The average family in Seoul consume about 20 eggs
in a week.

17. The typical Seoul family consume about 45 Kg of
rice in a month.



MAJOR FINDINGS



1. Bread Consumption Pattern

1-1. Profile of Bread Users (Table 1-1 thru 1-3)

About 1 out of 10 households are eating bread as a staple food at least several times a week, and about one-fourth of the sample families are doing so at least once a week.

People eat bread more at breakfast than at lunch or supper.

The bread users are more likely to be: college-educated, upper-class families, housewives' age 30 to 39, with western-style kitchen, an electric oven and a toaster. However, it should be noted that over 50% of upper-class families with western-style kitchen are still not using bread as a staple food.

1-2. Main Bread Users in the Family (Table 1-4)

Of those families who eat bread, less than half replied that all family members eat bread, and about 60% said that only some members in the family are bread-eaters. The main bread-users are 5 to 14 years-



old children, followed by 20 to 29, 30 to 39, and 15 to 19 years-old. Few of the 40 plus and under 5 years-old are bread-eaters.

1-3. Length of Time Bread Eaten (Table 1-5 & 1-6).

The majority of bread-users have started eating bread relatively recently. About 60% of the heavy-users said that they have been eating bread for about 4 years or less, and two-thirds of the light-users said the same.

When asked as to whose idea it was in deciding to eat bread as a staple food, nearly half of the bread users mentioned "children", and about one-third mentioned "housewife"(herself), and only 13% said that it was her "husband's" request.

The children's influence increases as the age of housewife goes up, and the wife's role becomes more important as her age becomes younger, in deciding to eat bread.



1-4. Favorite Type and Brands of Bread (Table 1-7 & 1-8)

Practically every bread-user said that they use regular loaf of bread, and do not usually eat other type of bread.

Their most favorite brands are:

SAMLIP MILK.....	34%
SEOUL MILK.....	20%
SAMLIP REGULAR.....	17%
NEIGHBORHOOD BAKERY.....	10%
WELL-KNOWN BAKERY.....	9%

Combining "milk" and "regular", SAMLIP is preferred by 51% of the bread users, SEOUL is by 23%, and CONTI is favored by 7%. The remaining 19% prefer to buy bread at either well-known or neighborhood bakery stores.

In terms of "milk" and "regular", far more people (58%) prefer milk bread over regular bread (23%).

Although heavy users tend to prefer well-known bakery brand, there is no significant difference in brand preference according to usage. However, in terms of SES, the upper-class distinctly favor individual bakery



bread, whereas the middle and lower-class prefer mass-produced breads like SAMLIP and SEOUL.

Surprisingly the more expensive "milk" breads are used by lower-class families just as much as by the upper-class.

1-5. Bread Consumption Volume (Table 1-9)

The typical bread-eating family consume $3\frac{1}{2}$ bags (15 slices) of bread in a week. This consumption volume varies greatly depending on usage and family size: heavy users eat on average about $4\frac{1}{2}$ bags, compared to 2.7 bags by light users; and the larger family (7 and more people) consume on average 4.3 bags, compared to 2.1 bags by the smaller family (4 or less people).

1-6. Manner of Eating Bread (Table 1-10 thru 1-12)

Most bread users said that they usually spread jam or butter on bread, and eat it with eggs and milk. Few people said that they eat bread without any spread, and without any fitting food/beverages.



1-7. Seasonality in Eating Bread (Table 1-13)

About half of the bread users said that they eat bread more during a certain season and another half said that they eat it throughout the four seasons. The heavy users tend to eat bread more irrespective of season than the light users.

1-8. Away-home Bread Consumption (Table 1-14)

As to the question of whether any member of the family take bread for luncheon box instead of rice, about 3-in-10 users said that there is a family member who take bread for lunch at least once a week. Most of these people are known to be school children, younger than 15 years old.

1-9. Eating Pastries (Table 1-15)

In 5-in-10 families including non-users of bread, "pan" or pastries are eaten as a snack at least several times a week. The family members who eat "pan" are mostly children age below 15 years.



2. Bread Purchase Pattern

2-1. Main Purchaser of Bread (Table 2-1)

In most case, housewife is the one who usually purchases bread. However, the older housewives tend to rely on children more than the younger wives. It should be noted that in about 1 out of 10 cases, husbands are the main purchaser of bread, and negligible proportion reported housemaid as the main shopper.

2-2. Purchase Place (Table 2-2)

People buy bread mostly (44%) at neighborhood stores, followed by supermarket (29%) and individual bakeries (18%). It is interesting to note that heavy users and low-class people patronize supermarket more than light users and upper-class families.

2-3. Single Purchase Volume (Table 2-3)

Most people (61%) usually buy 1 bag of 30 slices bread (450g) at one time. However, the light users and lower-class families tend to buy a smaller bag (15 slices) more than the upper-class and heavy users.



3. Attitudes Towards Bread and Other Staple Foods

3-1. Reasons for Not Eating Bread (Table 3-1 & 3-2)

When asked as to what are the major reasons for not eating bread as a staple food, the 452 non-users gave the following reasons:

"Expensive".....53%
"No particular reason;
not accustomed to".....35%
"Not filling stomach".....17%
"Don't like the taste".....10%
"Digest poorly".....4%
Others.....14%

(Multiple Answers)

The family members who dislike eating bread are mostly wives and husbands, and few of children.

3-2. Perceptions of Bread, Rice and Noodle (Table 3-3 thru 3-6)

All respondents (including non-users) were asked to give a rating on a 5-point scale of RICE, NOODLE and BREAD with respect to the following 5 attributes:



NUTRITION
TASTE
CONVENIENCE
ECONOMY
FILLING STOMACH.

As a whole, RICE is perceived as most "nutritious", "tasty", and "filling stomach"; NOODLE is perceived as most "economical"; and BREAD is regarded as most "convenient".

The heavy bread users consider bread being more "nutritious", and "convenient"; but less "tasty" and "filling stomach" than rice. They also regard noodle being more "economical", but less "nutritious", "tasty", "convenient", and "filling stomach" than bread.

It is not surprising that rice is perceived by the majority as the most tasty, nutritious and filling among the three (noodle, bread, rice) staple foods.



3-3. Taste of Current Bread (Table 3-7)

When asked of what they think of the taste of the current bread, compared to a year ago, about 40% of the users said that it "has deteriorated", and 14% said that it "became better". The remaining 47% said that either "it stayed the same" or "don't know".

4. Consumption of Other Staple Foods

4-1. Milk Consumption (Table 4-1)

Nearly half of the respondents^{stated} that they regularly drink milk in their homes. Milk-drinking is clearly related to bread-eating and SES: 73% of heavy-users of bread and 77% of upper-class families are drinking milk, whereas only 35% of non-users and 30% of lower-class families are doing so.

On the average, the non-user of bread consume about 11 bottles of 180cc in a week, whereas the heavy-users consume about 17 bottles in a week.



4-2. Egg Consumption (Table 4-2)

About two thirds of the sample stated that they eat eggs regularly. As stated in the foregoing Section 1, egg consumption is also related to bread-eating. The average heavy user of bread eat about twice as more egg in a week than the average non-user (30 vs 17). Also, the upper-class families consume far more eggs than the lower-class (35 vs 15).

4-3. Rice Consumption (Table 4-3)

On the average, the Seoul family eat about 45 Kg of rice in a month. As would be expected, the bread-users consume less rice than the non-users (39 Kg vs 43 Kg). It is interesting to note that both upper-class and lower-class consume more rice than the middle-class. This seems to be due to the family size.



DETAILED TABLES



Table 1-1

Proportions of Brand Users by Meal

<u>Frequency of Use</u>	<u>Breakfast</u> (N=600)	<u>Lunch</u> (N=600)	<u>Dinner</u> (N=600)
Everyday	4%	2%	1%
Several times a week	3	4	-
Once a week	4	7	1
Less often	2	1	1
Do not eat	87	86	97
Total	100%	100%	100%

Table 1-2

Proportions of Eating Bread at Any Meal

<u>Frequency of use</u>	<u>N</u>	<u>%</u>
Everyday	41	7
Several times a week	26	4
Once a week	75	13
Less often	6	1
Do not eat	452	75
Total	600	100%



Table 1-3
Characteristics of Bread Users

<u>Housewife Age</u>		<u>Heavy user*</u>	<u>Light user*</u>	<u>Non-user</u>	<u>Total</u>
20 - 29	(N=115)	3%	10%	87%	100%
30 - 39	(N=230)	15	15	70	100
40 +	(N=255)	11	15	74	100
<u>Education</u>					
None & primary	(N=253)	5	8	87	100
Middle & high	(N=286)	14	18	68	100
College & over	(N= 61)	23	15	62	100
<u>SES</u>					
Upper	(N= 78)	31	17	52	100
Middle	(N=152)	14	22	64	100
Lower	(N=370)	6	9	85	100
<u>Occupation of Household Head</u>					
Prof. & Mngr.	(N= 23)	17	13	70	100
Self-employed	(N= 33)	15	12	73	100
Cler. & skilled	(N=233)	15	13	72	100
Sales workers	(N=164)	9	19	72	100
Unskilled workers	(N= 88)	2	4	94	100
Unemployed	(N= 59)	8	14	78	100
Total	(N=600)	11%	14%	75%	100%

* Note: Heavy user: At least several times week
Light user: Once a week or less often



Table 1-3
Characteristics of Bread Users - (Continued)

<u>Kitchen Structure</u>		<u>Heavy user</u>	<u>Light user</u>	<u>Non-user</u>	<u>Total</u>	
Western style	(N=179)	21%	14%	65%	100%	
Traditional style	(N=421)	7	13	80	100	
<u>Electric Oven</u>						
Have	(N= 78)	26	21	53	100	
Do not have	(N=522)	9	12	79	100	
<u>Toaster</u>						
Have	(N= 98)	31	23	46	100	
Do not have	(N=502)	7	12	81	100	
<u>Total</u>		<u>(N=600)</u>	<u>11%</u>	<u>14%</u>	<u>75%</u>	<u>100%</u>



Table 1-4

Main Bread Users in the Family

<u>Persons</u>	<u>N</u>	<u>%</u>
All family	62	42
Some members	86	58
 Total	 148*	 100%
Under 5 years old	35	8
5 - 9 yrs. old	98	23
10 - 14 yrs. old	63	14
15 - 19 yrs. old	53	12
20 - 29 yrs. old	68	16
30 - 39 yrs. old	66	15
40 - 49 yrs. old	27	6
50 yrs. old & over	28	6
 Total	 438**	 100%

* Number of total households who use bread at any frequency.

** Number of those who were indicated as the main bread users when only "some members within the family" are eating bread.



Table 1-5
Length of Time Bread Eaten

<u>Length</u>	<u>Heavy user</u> (N=67)	<u>Light user</u> (N=81)	<u>Total</u> (N=148)
About 10 or more yrs.	16%	6%	11%
About 5 - 9 yrs.	25	20	22
About 2 - 4 yrs.	34	42	39
About 1 year	16	15	16
About 6 months	9	17	12
Total	100%	100%	100%

Table 1-6
Persons with Most Influence
in Deciding to Eat Brand

<u>Persons</u>	<u>Age of Housewife</u>			<u>Total</u> (N=148)
	<u>20-29</u> (N=16)	<u>30-39</u> (N=71)	<u>40+</u> (N=61)	
Parents	-%	-%	-%	1%
Husband	13	18	7	13
Housewife	44	31	20	28
Both housewife & husband	19	3	7	6
Children	-	42	59	45
Others	13	3	7	6
Don't know	11	2	-	2
Total	100%	100%	100%	100%



Table 1-7

Preferred Type of Bread

<u>Type of Bread</u>	<u>Heavy user</u> (N=67)	<u>Light user</u> (N=81)	<u>Total</u> (N=148)
French loaf	-%	3%	1%
Regular loaf	100	96	98
Others	-	1	1
<u>Total</u>	<u>100%</u>	<u>100%</u>	<u>100%</u>



Table 1-8

Most Favorite Brand of Bread

<u>Brand</u>	<u>Usage</u>		<u>SES</u>			<u>Total</u>
	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	<u>Upper</u> (N=37)	<u>Middle</u> (N=54)	<u>Lower</u> (N=57)	
SAMLIP						
Regular bread	14%	20%	6%	17%	25%	17%
Milk bread	36	32	28	39	33	34
SEOUL						
Regular bread	2	4	3	2	4	3
Milk bread	20	21	14	20	25	20
CONTI						
Regular bread	3	3	-	6	2	3
Milk bread	3	5	3	6	4	4
Well-known bakeries*	14	5	25	4	4	9
Unknown bakeries	8	10	21	6	3	10
Total	100%	100%	100%	100%	100%	100%

* Note: "Well-known bakeries" include Taedukdang,
Koryodang, New York, German Bakery, and
"unknown bakeries" are neighborhood stores
less-known bakeries in down-town.



Table 1-9
Weekly Bread Consumption Volume

Consumption Volume	Usage		SES			Total
	Heavy (N=67)	Light (N=81)	-5 (N=45)	5-6 (N=67)	7+ (N=36)	
Less than 1 bag*	2%	9%	18%	-%	3%	5%
1 bag	3	18	22	9	-	11
2 bags	18	34	27	22	33	27
3 bags	15	9	16	10	8	12
4 bags	21	21	9	27	25	21
5 bags	3	3	4	3	-	3
6 bags	22	1	4	16	8	11
7 bags	3	1	-	2	6	2
More than 7 bags	13	4	-	11	17	8
Total	100%	100%	100%	100%	100%	100%
Average	4.39	2.67	2.14	3.95	4.07	3.45

* Note: 1 bag = 15 slices



Table 1-10

Spreads for Bread

<u>Foods</u>	<u>N</u>	<u>%</u>
Jam	81	55
Butter	69	47
Magarine	37	25
Sugar	13	9
Mayonnaise	9	6
None	14	9

(Multiple Answers, Base = 148)

Table 1-11

Fitting Foods with Bread

<u>Foods</u>	<u>N</u>	<u>%</u>
Eggs	113	76
Ham	14	9
Vegetables	13	9
Others	7	5
None	26	18

(Multiple Answers, Base = 148)



Table 1-12

Beverages with Bread

<u>Beverages</u>	<u>N</u>	<u>%</u>
Milk	106	72
Barley tea	47	32
Coffee	17	11
Juices	7	5
Soft drinks	6	4
Soup	6	4
Others	8	5

(Multiple Answers, Base = 148)



Table 1-13
Seasonality in Eating Bread

<u>Seasons</u>	<u>Usage</u>		<u>Total</u>
	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	
Spring (March-May)	6%	3%	4%
Summer (June-August)	15	17	16
Fall (Sept.-Nov.)	2	3	2
Winter (Dec. -Feb.)	6	24	15
Spring and Summer	5	1	3
Spring and Fall	2	7	5
Summer and Fall	2	3	2
Summer and Winter	-	1	1
Irrespective of season	62	41	52
Total	100%	100%	100%



Table 1-14

Taking Bread for Lunch More than Once a Week

<u>Taking Bread for Lunch</u>	<u>N</u>	<u>%</u>
Yes	41	28
No	107	72
<u>Total</u>	<u>148</u>	<u>100%</u>

<u>Who</u>		
Under 10 years old	22	34
10 - 14 yrs. old	32	48
15 - 19 yrs. old	8	12
20 - 29 yrs. old	3	5
30 - 39 yrs. old	1	1
40 - 49 yrs. old	1	1
<u>Total</u>	<u>67*</u>	<u>100%</u>

* Number of those family members who take bread for lunch at least once a week.



Table 1-15

Eating Pastries At Least Several Times a Week

<u>Eating Pastries</u>	<u>N</u>	<u>%</u>
Yes	307	51
No	293	49
Total	600	100%

<u>Who</u>		
Under 5 years old	3	13
5 - 9 yrs. old	216	30
10 - 14 yrs. old	142	20
15 - 19 yrs. old	98	14
20 - 29 yrs. old	98	14
30 - 39 yrs. old	28	4
40 - 49 yrs. old	14	2
50 years old and over	21	3
Total	710*	100%

* Total number of those family members who eat pastries.



Table 2-1

Main Bread Purchaser

<u>Purchaser</u>	<u>Age</u>			<u>Usage</u>		<u>Total</u>
	<u>20-29</u> (N=16)	<u>30-39</u> (N=71)	<u>40+</u> (N=61)	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	
Parents	6%	1%	2%	2%	3%	2%
Husband	6	14	10	12	11	12
Housewife	81	61	43	55	56	55
Children	-	10	28	13	19	16
Housemaid	-	1	3	3	1	2
No single	7	11	12	13	9	11
Others	-	2	2	2	1	2
Total	100%	100%	100%	100%	100%	100%



Table 2-2

Purchase Place

<u>Purchase Place</u>	<u>Usage</u>		<u>SES</u>			<u>Total</u>
	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	<u>Upper</u> (N=37)	<u>Middle</u> (N=54)	<u>Lower</u> (N=57)	
Neighbourhood stores	27%	58%	27%	50%	48%	44%
Supermarket	39	20	24	28	32	29
Market place	8	4	3	6	7	5
Well-known bakery	12	5	22	4	4	8
Unknown bakery	8	11	22	7	4	10
No single	6	2	2	5	5	4
Total	100%	100%	100%	100%	100%	100%



Table 2-3
Single Purchase Volume

<u>Volume</u>	<u>Usage</u>		<u>SES</u>			<u>Total</u> (N=148)
	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	<u>Upper</u> (N=37)	<u>Middle</u> (N=54)	<u>Lower</u> (N=57)	
$\frac{1}{2}$ bag	22%	32%	11%	31%	35%	28%
1 bag	63	60	62	61	61	61
$1\frac{1}{2}$ bags	1	1	5	-	-	1
2 bags	10	5	16	6	4	8
More than 2 bags	4	2	6	2	-	2
Total	100%	100%	100%	100%	100%	100%
Average	1.06	0.89	1.22	0.93	0.86	0.97

Note: 1 bag = 30 slices (450g)



Table 3-1

Reasons for Not Eating Bread

<u>Reasons</u>	<u>N</u>	<u>%</u>
Expensive	239	53
No particular reasons; not accustomed	156	35
Not filling stomach	76	17
Do not like taste	46	10
Digest poorly	16	4
Elder's disliking	12	3
Others	50	11

Multiple Answers, Base = 452 households who do
not eat bread



Table 3-2
Persons Disliking Bread

<u>Persons</u>	<u>Age</u>			<u>SES</u>			<u>Total</u>
	<u>20-29</u> (N=99)	<u>30-39</u> (N=159)	<u>40+</u> (N=194)	<u>Upper</u> (N=41)	<u>Middle</u> (N=98)	<u>Lower</u> (N=313)	
Parents	7%	3%	4%	16%	2%	3%	4%
Husband	30	24	9	9	11	23	19
Housewife	28	31	37	28	35	33	33
Children	1	4	5	9	8	2	4
All family members	30	34	41	35	38	35	36
Others	4	4	4	3	6	4	4
Total	100%	100%	100%	100%	100%	100%	100%



Table 3-3
Perceptions of Bread, Rice, and Noodle

<u>Attributes</u>	<u>Bread</u> (N=600)	<u>Rice</u> (N=600)	<u>Noodle</u> (N=600)
Nutrition	3.58	4.04	3.21
Taste	3.54	4.15	3.42
Convenience	4.20	3.39	3.76
Economy	2.81	3.47	4.08
Filling stomach	2.96	4.84	3.29

Note: The following 5-point scale was used

- 5: Very good
- 4: Good
- 3: Fair
- 2: Poor
- 1: Very poor

Table 3-4
Perception of Bread by Bread Usage

<u>Attributes</u>	<u>Heavy user</u> (N=67)	<u>Light user</u> (N=81)	<u>Non-user</u> (N=452)
Nutrition	3.96	3.68	3.10
Taste	3.99	3.73	2.90
Convenience	4.81	4.44	3.35
Economy	3.22	3.06	2.15
Filling stomach	3.52	3.21	3.15



Table 3-5
Perception of Rice by Bread Usage

<u>Attributes</u>	<u>Heavy user</u> (N=67)	<u>Light user</u> (N=81)	<u>Non-user</u> (N=452)
Nutrition	3.91	3.95	4.26
Taste	4.13	4.11	4.21
Convenience	3.10	3.38	3.69
Economy	3.19	3.33	3.89
Filling stomach	4.76	4.84	4.92

Table 3-6
Perception of Noodle by Bread Usage

<u>Attributes</u>	<u>Heavy user</u> (N=67)	<u>Light user</u> (N=81)	<u>Non-user</u> (N=452)
Nutrition	3.01	3.04	3.58
Taste	3.09	3.44	3.73
Convenience	3.51	3.59	4.18
Economy	4.09	3.98	4.17
Filling stomach	3.22	3.25	3.42



Table 3-7

Taste of Current Bread Compared to a Year Ago

<u>Taste</u>	<u>Age</u>			<u>Usage</u>		<u>Total</u>
	<u>20-29</u> (N=16)	<u>30-39</u> (N=71)	<u>40+</u> (N=61)	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	
Improved	19%	16%	10%	13%	14%	14%
Same	6	17	25	19	15	17
Deteriorated	31	44	34	39	39	39
Don't know	44	23	31	29	32	30
Total	100%	100%	100%	100%	100%	100%

<u>Taste</u>	<u>Period of Time Bread Eaten</u>					<u>Total</u>
	<u>10 yrs.</u> <u>or more</u> (N=16)	<u>5-9</u> <u>years</u> (N=33)	<u>2-4</u> <u>years</u> (N=57)	<u>1</u> <u>year</u> (N=23)	<u>6</u> <u>months</u> (N=19)	
Improved	6%	3%	18%	30%	5%	14%
Same	38	9	19	4	21	17
Deteriorated	31	53	40	26	32	39
Don't know	25	35	23	40	42	30
Total	100%	100%	100%	100%	100%	100%



Table 4-1
Weekly Milk Consumption Volume

<u>Volume</u>	<u>Usage</u>			<u>SES</u>			<u>Total</u>
	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	<u>Non-user</u> (N=452)	<u>Upper</u> (N=78)	<u>Middle</u> (N=152)	<u>Lower</u> (N=370)	
Under 7 bottles	3%	7%	7%	9%	8%	5%	7%
7-10 bottles	13	12	14	17	16	12	14
11-20 bottles	32	22	8	23	28	8	13
21-30 bottles	19	9	5	22	8	4	7
31-40 bottles	-	2	1	1	1	1	1
Over 40 bottles	6	2	-	5	1	-	1
Do not drink milk	27	46	65	23	40	70	57
Total	100%	100%	100%	100%	100%	100%	100%
Average	16.94	15.38	10.85	16.28	12.68	11.18	12.89

Note: 1 bottle = 180cc



Table 4-2

Weekly Volume of Egg Consumption

<u>Volume</u>	<u>Usage</u>			<u>SES</u>			<u>Total</u>
	<u>Heavy</u>	<u>Light</u>	<u>Non-user</u>	<u>Upper</u>	<u>Middle</u>	<u>Lower</u>	
	(N=67)	(N=81)	(N=452)	(N=78)	(N=152)	(N=370)	(N=600)
Under 7 eggs	5%	6%	11%	1%	4%	14%	10%
7-10 eggs	6	12	17	5	17	17	15
11-20 eggs	13	20	14	7	20	15	15
21-30 eggs	34	32	16	33	28	13	20
31-40 eggs	23	16	5	17	16	3	8
Over 40 eggs	19	10	3	31	6	1	6
Do not eat egg	-	4	34	6	9	37	26
Total	100%	100%	100%	100%	100%	100%	100%
Average	30.16	23.38	17.51	34.84	21.60	14.72	20.58



Table 4-3
Monthly Volume of Rice Consumption

<u>Volume</u>	<u>Usage</u>			<u>SES</u>		
	<u>Heavy</u> (N=67)	<u>Light</u> (N=81)	<u>Non-user</u> (N=452)	<u>Upper</u> (N=78)	<u>Middle</u> (N=152)	<u>Lower</u> (N=370)
Under 5 Mals	69%	64%	63%	50%	67%	65%
6-10 Mals	31	36	31	47	31	28
11-15 Mals	-	-	5	3	1	4
16 Mals & over	-	-	1	-	1	1
Total	100%	100%	100%	100%	100%	100%
Average	4.88	5.02	5.34	6.10	5.27	5.68

<u>Volume</u>	<u>Family Size</u>			<u>Total</u> (N=600)
	<u>-4</u> (N=196)	<u>5-6</u> (N=257)	<u>7+</u> (N=147)	
Under 5 Mals	90%	61%	33%	63%
6-10 Mals	10	37	52	32
11-15 Mals	-	2	12	4
16 Mals & over	-	-	3	1
Total	100%	100%	100%	100%
Average	3.26	5.83	8.52	5.63

Note: 1 Mal = 8 Kg



APPENDICES

1. Sample Characteristics
2. Questionnaire



APPENDIX 1

Sample Characteristics

<u>Housewife Age</u>	<u>N</u>	<u>%</u>
20 - 29	115	19.2
30 - 39	230	38.3
40 +	255	42.5
<u>Educational Attainment</u>		
No schooling	31	5.2
Primary school	222	37.0
Middle school	133	22.2
High school	153	25.4
College & over	61	10.2
<u>Occupation of Household Head</u>		
Prof. & mngr.	23	3.8
Self-employed	33	5.5
Clerical & skilled	233	38.9
Sales workers	164	27.3
Unskilled workers	88	14.7
Unemployed	59	9.8
<u>Housewife Employed Status</u>		
Employed	57	9.5
Not employed	543	90.5
<u>Total Household Monthly Income</u>		
Less than W70,000	269	44.8
W70,000 - W99,999	149	24.8
W100,000 - W149,999	106	17.7
W150,000 - W249,999	51	8.5
W250,000 & over	25	4.2
Average: W97,350		



Sample Characteristics - (Continued)

<u>Family Size</u> (Including non-relatives)	<u>N</u>	<u>%</u>
1 - 2	26	4.3
3 - 4	170	28.4
5 - 6	257	42.8
7 & over	147	24.5
Average: 5.4		
<u>Pattern of Family Composition</u>		
Nuclear family*	394	65.7
Large family	206	34.3
<u>Kitchen Structure</u>		
Western style	179	29.8
Traditional style	421	70.2
<u>Type of House</u>		
Western style	158	26.3
Apartment	33	5.5
Korean style	156	26.0
Eclectic style	253	42.2
<u>Floor Space</u>		
Under 15 Pyong	250	41.6
15 - 20 Pyong	157	26.2
21 - 30 Pyong	117	19.5
31 - 45 Pyong	41	6.9
45 Pyong & over	35	5.8
Total	600	100.0%

* Note: Nuclear family is composed of two generations. Large family is composed of three generations; grandparents, parents and children.



Sample Characteristics - (Continued)

<u>Possession of Durable Goods</u>	<u>N</u>	<u>%</u>
Radio	543	91
Sewing machine	370	62
Electric fan	449	75
Television	445	74
Electric rice cooker	306	51
Electric cooked rice container	226	38
Stereo	190	32
Refrigerator	178	30
Telephone	157	26
Mixer	139	23
Tape recorder	118	20
Toaster	98	16
Electric oven	78	13
Central heating	49	8
Air conditioner	12	2
Automobile	14	2

Base = 600



Job #30512

Card #: _____
Quest. #: _____

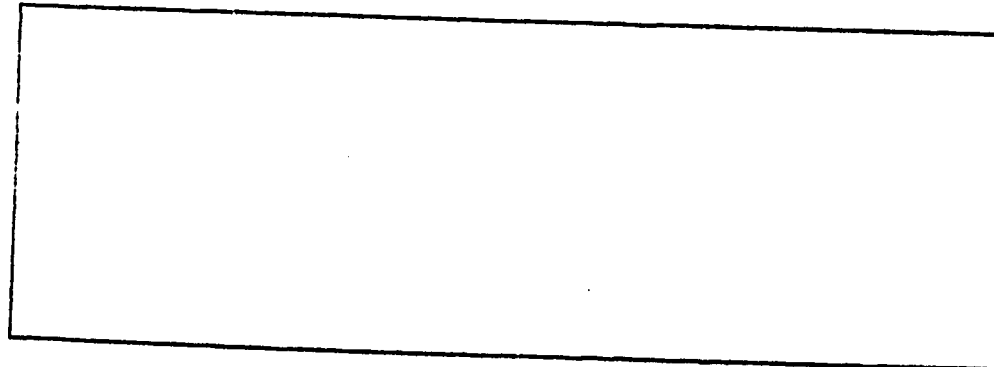
APPENDIX 2: Questionnaire

Bread Consumption Pattern Survey

Hello! I am _____ from ASI Market Research Company
in Seoul. (SHOW I.D. CARD) We are conducting a survey on
consumers bread eating habits. I would like to ask you a
few questions, and would appreciate very much your coopera-
tion.

Age of Respondent : _____
Name of Respondent : _____ Name of Household head: _____
Address of Respondent: _____
Name of Interviewer : _____
Time of Interview : From _____ To _____
Time Spent : _____ Minutes
Editor : _____ Date of Editing: _____
Validator: _____ Date of Validation: _____

Map of Respondent's House:



- Q1. a) Do you ever eat bread for breakfast in your family?
 b) How often do your family have bread for breakfast?
 (SHOW CARD 1)

- Q2. a) Do you ever eat bread for lunch in your family?
 b) How often do your family have bread for lunch?
 (SHOW CARD 1)

- Q3. a) Do you ever eat bread for dinner in your family?
 b) How often do your family have bread for dinner?
 (SHOW CARD 1)

	<u>Do not</u>	<u>Nearly</u>	<u>3-4 times</u>	<u>1-2 times</u>	<u>Less often</u>
	<u>Eat</u>	<u>eat</u>	<u>everyday</u>	<u>a week</u>	<u>a week</u>
					<u>(specify)</u>
Breakfast.....1.....2 (ASK Q2)			1.....	2.....	3.....4
Lunch.....1.....2 (GO TO Q3)			1.....	2.....	3.....4
Dinner.....1.....2 (GO TO Q17)			1.....	2.....	3.....4

- Q4. (ASK ALL RESPONDENTS WHO EAT BREAD FOR BREAKFAST OR LUNCH OR DINNER.)

- a) Who in your family eat bread at meals?

All family members.....1 (GO TO Q5)
 Some members.....2 (ASK Q4b)

- b) Please tell me the age and sex of those who eat bread at meals.

<u>Age</u>	<u>Sex</u>
_____ yrs. old	M . F
_____ yrs. old	M . F
_____ yrs. old	M . F
_____ yrs. old	M . F



Q5. How long have you been eating bread as staple food in your family?

Since 10 yrs. ago.....1
 Since 5-9 "2
 Since 2-4 "3
 Since 1 year ago.....4
 Since 6 months ago.....5

Q6. Do you remember whose idea it was to eat bread at meals?

Parents.....1
 Husband.....2
 Self.....3
 Self & husband.....4
 Children.....5
 Others().....6
 specify
 DK.....7

Q7. What kind of bread do you usually eat? (SHOW CARD 2)

Roll.....1
 French loaf.....2
 Regular sliced loaf.....3
 Others().....4
 specify

Q8. What brand of bread have you used most this year? (SHOW CARD 3)

Seoul.....Regular bread.....1
 Milk bread.....2
 Sam Lip....Regular bread.....3
 Milk bread.....4
 Conti.....Regular bread.....5
 Milk bread.....6
 Well-known bakery prod.
 (Taekukdang, New York Bakery,
 Koryodang, German Bakery).....7
 Unknown bakery prod.
 (neighbourhood bakery, &
 others).....8



- Q9. Package size and price of bread differ by each manufacturing company. But usually the largest bag contains 30 sliced breads.

How many bags of 30-slices do your family eat on the average in a week?

Less than 1 bag.....1
 1 bag.....2
 2 bags.....3
 3 bags.....4
 4 bags.....5
 5 bags.....6
 6 bags & more.....7

- Q10. When your family eat bread,

- a) What do you usually spread on the bread? (M.A.)

Magarine.....1
 Jam.....2
 Butter.....3
 Honey.....4
 Mayonnaise.....5
 Ketchup.....6
 Others().....7
 specify
 Nothing.....8

- b) What sorts of food are often eaten with bread?(M.A.)

Cheese.....1
 Egg.....2
 Bacon.....3
 Ham.....4
 Others().....5
 specify

- c) What beverages do you usually drink when eating bread? (M.A.)

Milk.....1	Tea.....5
Coffee.....2	Barley tea.....6
Soft drinks....3	Others()....7
Juices.....4	specify



Q11. What time of the year do your family eat bread more often? (M.A.)

Spring.....1
 Summer.....2
 Fall.....3
 Winter.....4
 Irrespective of season.....5

Q12. Comparing the taste of present bread with the ones of a year ago, would you say that the taste has been improved, has deteriorated, or the same?

Improved.....1
 Same.....2
 Deteriorated.....3
 DK.....4

Q13. a) Are there anyone in your family who takes bread for lunch instead of rice at least once a week?

No.....1 (GO TO Q14)
 Yes.....2 (ASK Q13b)

b) Please tell me their age and sex.

Age	Sex
_____ yrs. old	M . F
_____ yrs. old	M . F
_____ yrs. old	M . F
_____ yrs. old	M . F

Q14. Who in your family usually buys bread? (S.A.)

Parents.....1
 Husband.....2
 Self.....3
 Children.....4
 Housemaid.....5
 Irregular.....6
 Others(_____).....7
 specify



Q15. Where do (does) you (she/he) usually buy (s) bread?

Neighborhood store.....1
Supermarket.....2
Market-place.....3
Well-known bakeries
(Taekukdang, New York Bakery,
Koryodang, German Bakery).....4
Unknown bakeries
(Neighborhood bakery & others).....5
No one place in particular.....6

Q16. How many bags of bread do you usually buy at a time?
(GO ON TO Q19)

	<u>No. of bags</u>
30 slices bag.....1	_____
15 slices bag.....2	_____
4 slices bag.....3	_____
Others(_____).....4	_____
specify	

(ASK THOSE WHO NEVER EAT BREAD)

Q17. What are the reasons that your family do not eat
bread but rice? Anything else? (RECORD IN ORDER)

Q18. Who in your family especially dislike eating bread
instead of rice?

Parents.....1
Husband.....2
Self.....3
Children.....4
Others(_____).....5
specify



(ASK ALL RESPONDENTS)

- Q19. a) Are there anyone in your family who eat "Pan" as a snack 3-4 times a week or more often?

Yes.....1 (GO TO Q20)

No.....2 (ASK Q19b)

- b) Please tell me their age and sex.

<u>Age</u>	<u>Sex</u>
_____ yrs. old	M . F
_____ yrs. old	M . F
_____ yrs. old	M . F
_____ yrs. old	M . F

- Q20. Now I would like to ask you a few questions on how you evaluate bread, rice and noodle as staple food in terms of various attributes. (SHOW CARD 4 AND RECORD BELOW)

- a) What do you think about rice in terms of nutrition?
What about noodle? What about bread?
- b) What do you think about rice in terms of taste?
What about noodle? What about bread?
- c) What do you think about rice in terms of convenience? What about noodle? What about bread?
- d) What do you think about rice in terms of economy?
What about noodle? What about bread?
- e) What do you think about rice in terms of filling stomach? What about noodle? What about bread?



		<u>Very Good</u>	<u>Very Poor</u>
a) Nutrition	Rice.....	5.....4.....3.....2.....1	
	Noodle.....	5.....4.....3.....2.....1	
	Bread.....	5.....4.....3.....2.....1	
b) Taste	Rice.....	5.....4.....3.....2.....1	
	Noodle.....	5.....4.....3.....2.....1	
	Bread.....	5.....4.....3.....2.....1	
c) Convenience	Rice.....	5.....4.....3.....2.....1	
	Noodle.....	5.....4.....3.....2.....1	
	Bread.....	5.....4.....3.....2.....1	
d) Economy	Rice.....	5.....4.....3.....2.....1	
	Noodle.....	5.....4.....3.....2.....1	
	Bread.....	5.....4.....3.....2.....1	
e) Filling stomach	Rice.....	5.....4.....3.....2.....1	
	Noodle.....	5.....4.....3.....2.....1	
	Bread.....	5.....4.....3.....2.....1	

Q21. a) Would you consider eating bread instead of rice in the future?

Yes.....1
No.....2

b) If so, how much are you interested in eating bread as staple food? (SHOW CARD 5)

Very much.....1

2

3

4

Never.....5

DK.....6

What are the reasons?
Anything else?



c) And what about your husband? What would he think?
(SHOW CARD 5)

Very much.....1

2

3

4

What are the reasons?

Never.....5

Anything else?

DK.....6

Q22. How much rice do your family eat in a month?
(10 Doi = 1 Mal)

_____ Mal

Q23. How many eggs do your family eat in a day?

Q24. Now I would like to ask you about milk. Here are
two different sizes of milk bottles and packs. (SHOW
BOTTLES & PACKS) The larger bottle and pack contain
360cc of milk and the smaller one, 180cc, that is
half of the larger size. How many small bottles of
milk do your family consume on average in a day?



Classification Data

1. How many are there in your family? (Including housemaid, relatives & tutor)

Please tell me their age from the oldest down to the youngest.

<u>Relationship</u>	<u>Age</u>	<u>Sex</u>
_____	_____ yrs. old	M . F
_____	_____ yrs. old	M . F
_____	_____ yrs. old	M . F
_____	_____ yrs. old	M . F
_____	_____ yrs. old	M . F
_____	_____ yrs. old	M . F

2. What is your age? _____ yrs. old

3. a) Where have you been living most of your life?

- b) What about your husband?

4. How much schooling have you completed?

Primary school.....1
 Middle school.....2
 High school.....3
 College.....4

5. What is your husband's occupation?



6. Do you have a regular job?

Yes.....1
No.....2

7. What is the total monthly income of your household?

Less than W70,000.....1
W70,000 - W99,999.....2
W100,000 - W149,999.....3
W150,000 - W249,999.....4
W250,000 - W299,999.....5
W300,000 & more.....6

8. Do you own any of the following household durables?

Radio.....1
Sewing machine.....2
Electric fan.....3
Television.....4
Electric rice cooker.....5
Electric cooked rice container..6
Electric oven.....7
Toaster.....8
Mixer.....9
Stereo.....10
Tape recorder.....11
Refrigerator.....12
Telephone.....13
Central heating.....14
Air-conditioner.....15
Automobile.....16

9. Type of house:

Western style.....1
Apartment.....2
Korean style.....3
Eclectic style.....4



10. Is your kitchen western style or traditional style?

Western style.....1
Traditional style.....2

11. Floor space of your house:

Less than 15 pyong.....1
15 - 20 pyong.....2
21 - 30 pyong.....3
31 - 45 pyong.....4
46 pyong & over.....5

12. SES:

		By <u>Respondents</u>	By <u>Interviewer</u>
Upper	(A).....	1.....	1
Upper-middle	(B).....	2.....	2
Middle	(C).....	3.....	3
Lower-middle	(D).....	4.....	4
Lower	(E).....	5.....	5

13. Do you keep household accounts?

Yes.....1
No.....2

THANK YOU!

