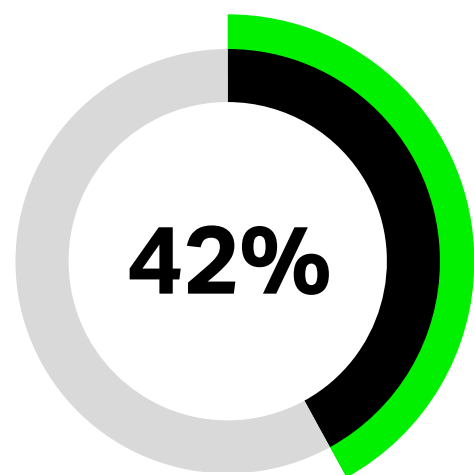


# Agnostic Buyers

Need-based considerations ahead of purchasing



**I just purchase what I need without thinking deeply about the brand it comes from.**

## **Opportunity**

Largest segment of global consumers, huge opportunity for brands of all sizes to nurture and convert. Most open to persuasion.

## **Key findings**

### **Purchase indifference**

36% find it hard to differentiate between various brand options available to them

### **Price sensitive**

In Latin America, 23% are Strugglers (have and continue to suffer financially), and 18% will buy whatever brand is on promotion. To them, affordability is highly associated with small brands

## **Market highlights of Agnostic Buyers in Latin America**

Brazil

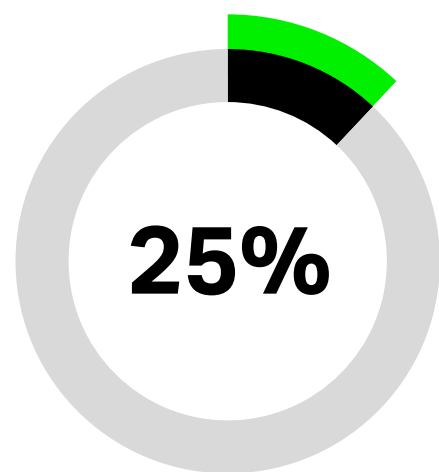
**37%**

Mexico

**46%**

# Unintentional small buyers

Slight small brand preference, only when it's convenient



**I don't go out of my way to buy specific brands, but all things being equal, I'd prefer to buy small brands.**

## Opportunity

A cohort for small and medium businesses to nurture and remind. They have potential to develop deeper loyalties if smaller brands can resonate with them.

## Key findings

### Cautious majority

In Latin America, 38% are Cautious (not impacted financially, but cautious with spending), need help justifying value of their purchase choices

### Resonance matters

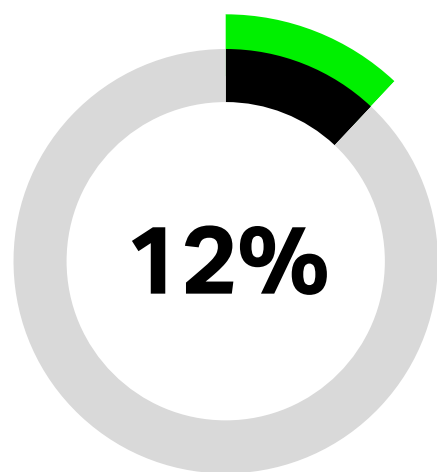
To them, brands that have environmental or social benefits that resonate personally are important and highly associated to that typically offered by smaller brands.

## Market Highlights of Unintentional Small Buyers in Latin America

Brazil	27%
Mexico	24%

# Exclusive Small Brand Buyers

Most likely to directly seek out small/ medium brands for purchase



**I prefer to buy small brands over purchasing from large manufacturers or retail brands.**

## Opportunity

The "sweet spot" of consumer preferences for small and medium businesses to protect and defend their share of.

## Key findings

### Sustainable interests

Top attributes regular sought by exclusive small brand buyers are Environmentally friendly, natural / healthy, sustainably produced, clean label.

### Local Supporters

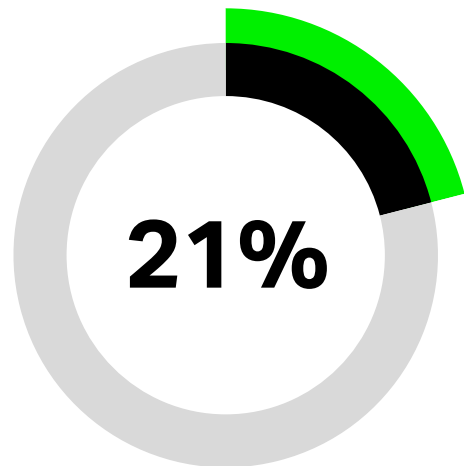
In Latin America, 29% are say it's important that brands support local communities, and highly associate this to what they know and expect of smaller brands.

## Market Highlights of Exclusive Small Brand Buyers in Latin America

Brazil	12%
Mexico	11%

# Exclusive Large Brand Buyers

Most likely to directly seek out large brands for purchase



**I prefer to buy well known large brands whenever I can.**

## **Opportunity**

The “sweet spot” of consumer preferences larger businesses to protect and defend their share of.

## **Key findings**

### Expect Top Quality

In Latin America, 91% of respondents say it’s important that brands have superior quality compared to competitive brands they could have bought. Notoriety and brands are the most well-known is also highly important.

### Direct Communication

61% of the respondents like when brands contact them directly in an informal or personal way. 63% like knowing a brand’s story, origin or reason for being.

## **Market Highlights of Exclusive Large Brand Buyers in Latin America**

Brazil	24%
Mexico	19%