Sweetener 360

Attitudes
Behaviors
Values

THE 2015 SWEETENER360: ARE YOU MARKETING TO BUZZ OR BEHAVIOR?

How Shifting Attitudes Toward Food Ingredients Are Driving Your Consumers' Purchase Decisions

MARCH 9, 2015 | CSIFT






The Sweetener360 is a custom research study commissioned by the Corn Refiners Association and completed in part by Nielsen and Mintel Consulting.

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MEET "MINDFUL" JULIA

EVIDENCE POINTS TO MORE CONSUMERS BECOMING JULIA – AND THAT HAS HUGE IMPLICATIONS FOR FOOD AND BEVERAGE BRANDS LIKE YOURS.

WHAT DOES "MINDFUL" MEAN?

Similar to the perspectives offered by University of California Berkeley, The Center for Mindful Eating, and others, "mindful" refers to awareness and thoughtfulness about eating habits and the sensations experienced when eating.

The "mindful" shopper focuses on balance, without fixating on any single ingredient or food product as the sole determinant for healthier eating.

“SAY VS. DO”
IS HUMAN NATURE

WHO WE ARE AND WHAT WE'VE DONE

SARA MARTENS
Vice President
The MSR Group

MARTIN CONCANNON
Founder and Managing Director
Lafayette Associates

METHODOLOGY

- 15,552 Nielsen Homescan HH primary grocery shoppers
- 15 high-volume product categories
- Attitudinal and behavioral data integrated through Nielsen Homescan panel
- Aided and unaided questions


TOTAL VS. TYPE
TASTE & PRICE
SAY VS. DO

WHAT’S NEW IN 2015?

CONSUMERS ARE MORE MINDFUL.

MILLENNIALS FOLLOW SUIT.

SOCIAL MEDIA AMPLIFIES BUT DOESN’T LEAD.

REPORTS OR CLAIMS OF WIDESPREAD CONSUMER AVOIDANCE OF SPECIFIC INGREDIENTS – HFCS IN PARTICULAR – LEAD F&B COMPANIES TO MAKE NEEDLESS AND COSTLY CHANGES TO THEIR PRODUCT FORMULATIONS AND MARKETING STRATEGIES.

WHY “NEEDLESS,” IF THAT’S WHAT CONSUMERS WANT?

ONE IN THREE CONSUMERS CONCERNED ABOUT SWEETENERS IN GENERAL

ONE IN THREE CONSUMERS

SIX IN ONE HUNDRED ARE CONCERNED ABOUT HFCS SPECIFICALLY

SIX IN ONE HUNDRED CONSUMERS

CONCERN ≠ AVOIDANCE

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Data based on unaided responses

YES, THERE IS A BUZZ

Los Angeles Times

"Sounding the alarms against sugar."

60 MINUTES

"Is Sugar Toxic?"

CNN

"Fructose changes brain to cause overeating, scientists say."

BUT . . .

1. UNBALANCED MEDIA COVERAGE
2. ANONYMOUS SOURCES
3. COVERAGE WITHOUT CONTEXT

LET’S LOOK AT CONSUMER SEGMENTS THEMSELVES

9% US HH

MEET WALTER:
NO HEALTH WORRIES

- Avg age: ***49***
- Avg HH income: ***$57,676***
- Avg HH size: ***2.5***
- Age range of kids in HH: ***No kids under 18***

16% US HH

MEET TERESA:
TOO MANY PRIORITIES

- Avg age: ***48.5***
- Avg HH income: ***$70,330***
- Avg HH size: ***2.9***
- Age range of kids in HH: ***<18***

13% US HH

MEET SANDRA:
TASTE OVER HEALTH

- Avg age: ***48.4***
- Avg HH income: ***$66,315***
- Avg HH size: ***2.7***
- Age range of kids in HH: ***6-17***

LET'S LOOK AT CONSUMER SEGMENTS THEMSELVES

18% US HH

MEET JOAN:
DIABETICS & DIETERS

- Avg age: ***51***
- Avg HH income: ***$68,300***
- Avg HH size: ***2.6***
- Age range of kids in HH: ***>18***

19% US HH

MEET JULIA:
HEALTHY BALANCE SEEKER

- Avg age: ***48.4***
- Avg HH income: ***$71,363***
- Avg HH size: ***2.8***
- Age range of kids in HH: ***<18***

15% US HH

MEET STACEY:
ALL NATURAL

- Avg age: ***49.6***
- Avg HH income: ***$69,200***
- Avg HH ***size: 2.9***
- Age range of kids in HH: ***6-17***

A CLOSER LOOK:
WALTER AND SANDRA

***Q4**: "Thinking about the past six months, what foods, beverages, or specific ingredients, if any, have you or other members of your household been trying to purposefully consume less of or avoid?"*

***Q18**: "Below is a list of foods, beverages, and specific ingredients some people may be trying to purposefully consume less of or avoid. Which foods, beverages, or specific ingredients, if any, have you or other household members been trying to avoid or purposefully consuming less of in the past 6 months?"*

WALTER: NO HEALTH WORRIES

	AIDED	UNAIDED
Sugars	24.1%	6.2%
HFCS	9.6%	0.5%
Sodium	27.5%	3.2%
Artificial ingredients	5.3%	2.7%
GMOs	6.1%	0.1%
Gluten	3.9%	1.1%

SANDRA: TASTE OVER HEALTH

	AIDED	UNAIDED
Sugars	22.8%	5.7%
HFCS	14.3%	0.3%
Sodium	39.8%	5.4%
Artificial ingredients	15.6%	3.4%
GMOs	14.7%	0.1%
Gluten	7.9%	1.3%

- Few concerns about their health
- Care more about taste and price
- Two smallest segments
- Generally not important to sweetener strategies

A CLOSER LOOK:
TERESA

***Q4**: "Thinking about the past six months, what foods, beverages, or specific ingredients, if any, have you or other members of your household been trying to purposefully consume less of or avoid?"*

***Q18**: "Below is a list of foods, beverages, and specific ingredients some people may be trying to purposefully consume less of or avoid. Which foods, beverages, or specific ingredients, if any, have you or other household members been trying to avoid or purposefully consuming less of in the past 6 months?"*

TERESA: TOO MANY PRIORITIES

	AIDED	UNAIDED
Sugars	**54.7%**	**29.9%**
HFCS	**27.6%**	**2.4%**
Sodium	**48.6%**	**12.5%**
Artificial ingredients	**28.2%**	**7.1%**
GMOs	**24.1%**	**0.6%**
Gluten	**10%**	**3.6%**

- May be called our "mainstream mom"
- Large segment
- Busy life with many demands
- Size of segment makes her important, but no strong point of view on ingredients

A CLOSER LOOK:
JOAN

***Q4**: "Thinking about the past six months, what foods, beverages, or specific ingredients, if any, have you or other members of your household been trying to purposefully consume less of or avoid?"*

***Q18**: "Below is a list of foods, beverages, and specific ingredients some people may be trying to purposefully consume less of or avoid. Which foods, beverages, or specific ingredients, if any, have you or other household members been trying to avoid or purposefully consuming less of in the past 6 months?"*

JOAN: DIABETICS & DIETERS

	AIDED	UNAIDED
Sugars	**74.2%**	**39.9%**
HFCS	**56.6%**	**3.5%**
Sodium	**55.5%**	**12.9%**
Artificial ingredients	**36.5%**	**6.9%**
GMOs	**31.2%**	**0.7%**
Gluten	**12.7%**	**4.3%**

- Diabetes and her interest in dieting affect her food choices and sometimes her purchase decisions.

A CLOSER LOOK:
JULIA AND STACEY

***Q4**: "Thinking about the past six months, what foods, beverages, or specific ingredients, if any, have you or other members of your household been trying to purposefully consume less of or avoid?"*

***Q18**: "Below is a list of foods, beverages, and specific ingredients some people may be trying to purposefully consume less of or avoid. Which foods, beverages, or specific ingredients, if any, have you or other household members been trying to avoid or purposefully consuming less of in the past 6 months?"*

JULIA: HEALTHY BALANCE SEEKER

	AIDED	UNAIDED
Sugars	**47.2%**	**24.5%**
HFCS	**86.2%**	**17.3%**
Sodium	**46.7%**	**15.6%**
Artificial ingredients	**53.5%**	**16.6%**
GMOs	**47.7%**	**3.4%**
Gluten	**13.6%**	**5.4%**

STACEY: ALL NATURAL

	AIDED	UNAIDED
Sugars	**72.8%**	**43.4%**
HFCS	**77.8%**	**9.2%**
Sodium	**62%**	**17.7%**
Artificial ingredients	**69.9%**	**19.9%**
GMOs	**65.2%**	**5.8%**
Gluten	**23.2%**	**9.8%**

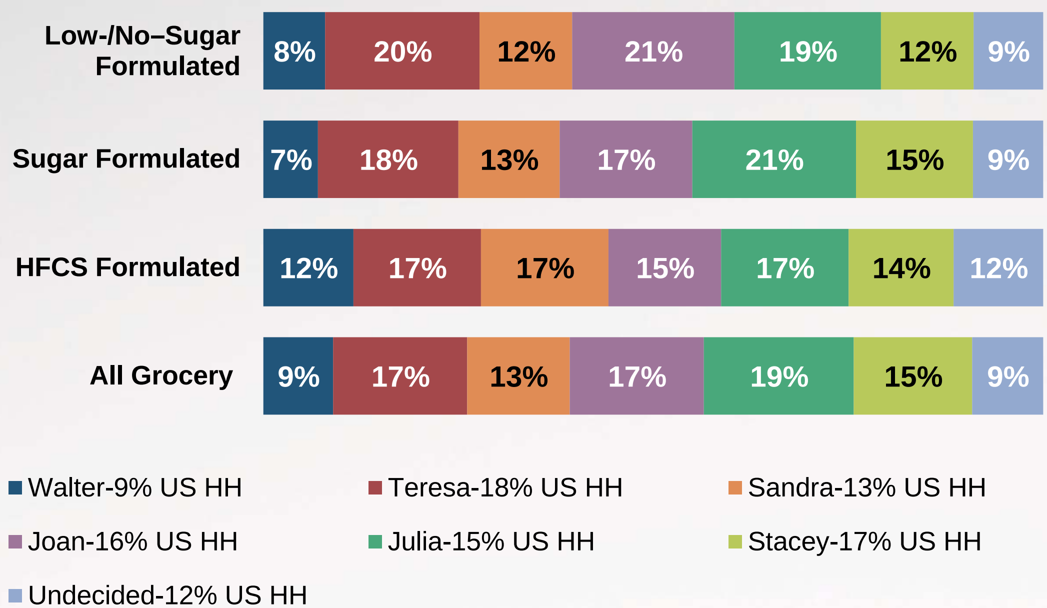
Q18 (aided): Which foods, beverages or specific ingredients, if any, have you or other household members been trying to avoid or purposefully consuming less of in the past 6 months?

	WALTER No Health Worries	TERESA Too Many Priorities	SANDRA Taste over Health	JOAN Diabetics & Dieters	JULIA Healthy Balance Seeker	STACEY All Natural
Number of items out of the 20 listed:	**5**	**15**	**6**	**17**	**17**	**18**
Item 1	**Soda 28%**	**Sugar 54.7%**	**Salt 39.8%**	**Sugar 74.2%**	**HFCS 86.2%**	**HFCS 77.8%**
Item 2	**Salt/Sodium 27.5%**	**Salt 48.6%**	**Soda 35.7%**	**Soda 56.3%**	**Soda 55.9%**	**Sugar 72.8%**
Item 3	**Sugar 24.1%**	**Soda 45.3%**	**Fats 24.5%**	**Salt 55.5%**	**Additives, Artificial Ingredients 53.5%**	**Processed Foods 72.4%**
Item 4	**Desserts 19.9%**	**Fats 41.7%**	**Desserts 24.3%**	**Desserts 54%**	**Processed Food 51.6%**	**Additives, Artificial Ingredients 69.9%**
Item 5	**Cholesterol 18.5%**	**Processed Foods 37.5%**	**Cholesterol 23.3%**	**Processed Foods 46.6%**	**Fats 50.2%**	**Soda 68%**

**Cited by at least 25% of segment*

THE NET ON SALES BY CONSUMER SEGMENT

Every segment buys its fair share of HFCS-formulated products ($ value).



Sales are nationally projected totals, based on Nielsen Homescan panel projections from the purchases of 15,219 panelists in 15 high-volume product categories during Sept. 22, 2013, through Sept. 20, 2014.

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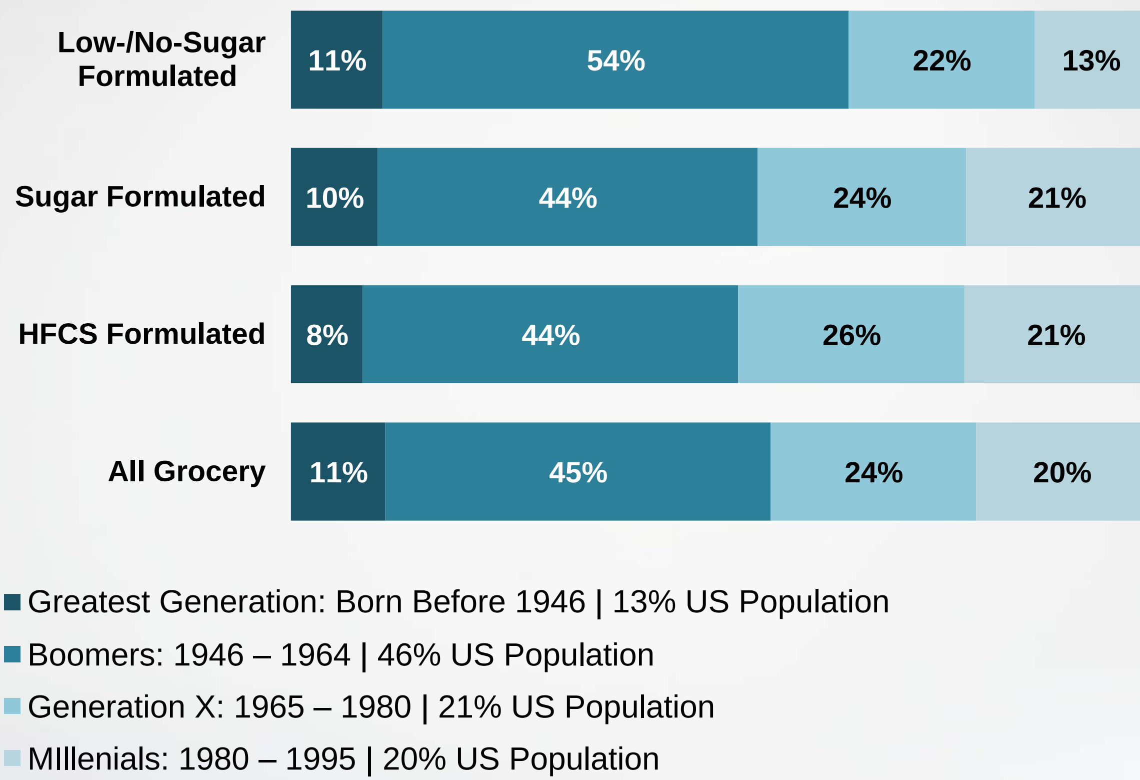
THE NET ON SALES BY GENERATION



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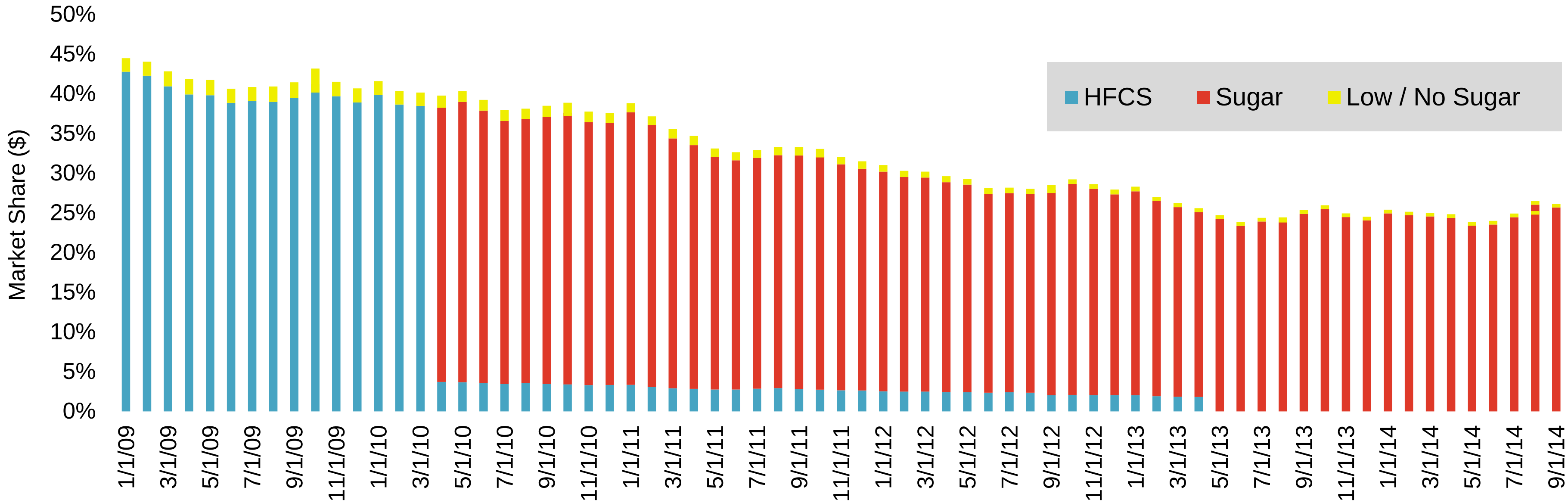
HOW IS THE MARKET CHANGING?


LET'S LOOK AT SOME CASE STUDIES …


Yoplait®

SWEETENER TYPE HAD NO EFFECT ON SALES

Yoplait made “HFCS-Free” its point of differentiation from other yogurt brands.



THAT SWEETENER STRATEGY DID NOT IMPROVE BRAND SHARE SIGNIFICANTLY.

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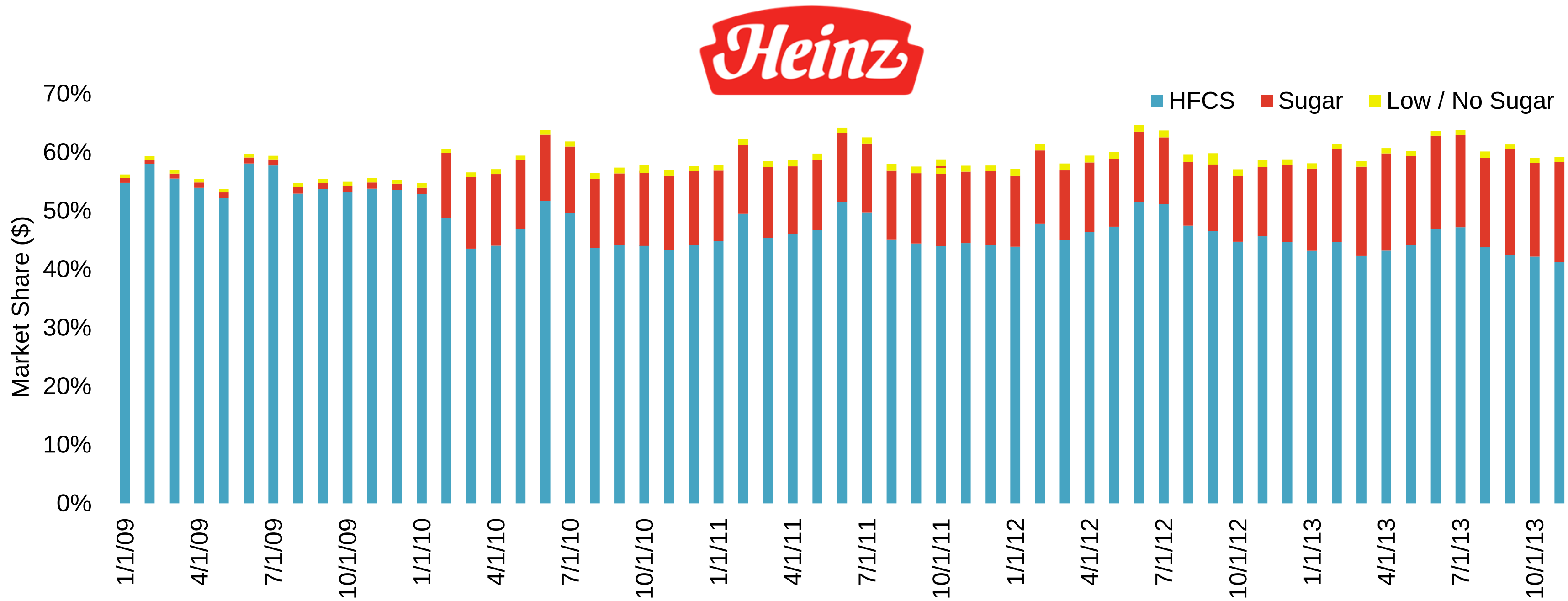
Source: Nielsen US Retail Sales All Outlets Combined (including Walmart). September 2014.

Heinz VS. 100% NATURAL Hunt's® TOMATOES

HUNT'S KETCHUP WENT COMPLETELY "HFCS-FREE"; AND WHEN THAT PRODUCED NO MEANINGFUL GAIN IN SALES OR SHARE, IT ENDED UP SWITCHING BACK TO HFCS.

Source: *Nielsen US Retail Sales All Outlets Combined (including Walmart). July 2013.*



Source: Nielsen US Retail Sales All Outlets Combined (including Walmart). July 2013.

Sara Lee

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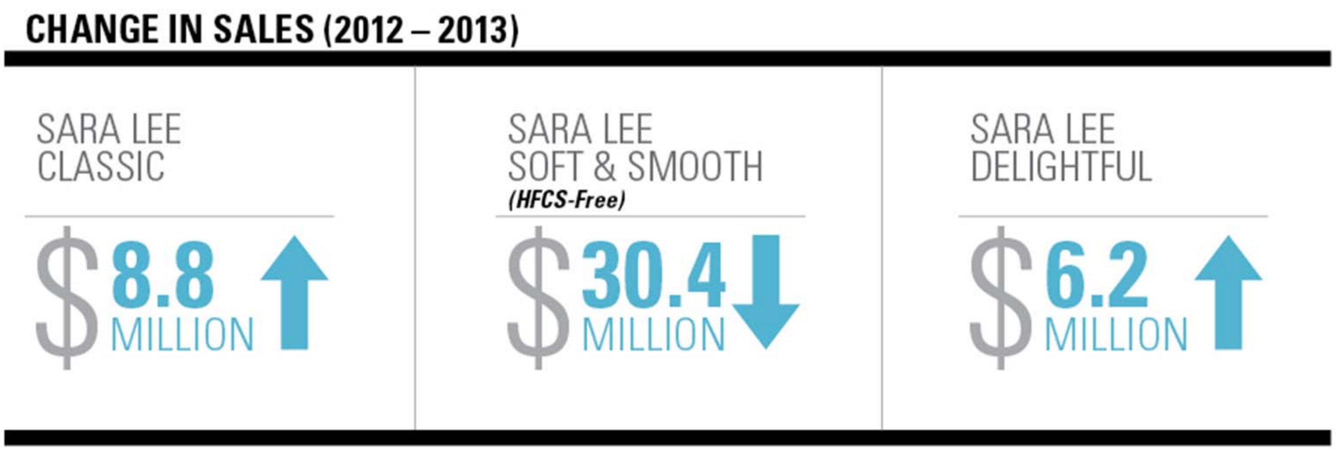
SARA LEE SOFT & SMOOTH

Sara Lee made “HFCS-Free” its point of differentiation in its Soft & Smooth brand of breads, but that did not increase sales.



Nielsen Sara Lee Category Data extract, April 2014

STACEY MAY DRIVE THE CONVERSATION, BUT JULIA DRIVES SALES

JULIA:

- Less vocal
- The “mindful” shopper
- Buys her share of HFCS-sweetened products

STACEY:

- Activ(ist) interest in food products
- See herself as adviser to friends
- Buys nearly her HH’s full share of HFCS-sweetened products


WOULD JULIA BUY MORE IF YOUR BRAND SWITCHES SWEETENERS?
WHAT DO YOU THINK?

NOW LET'S LOOK AT SOME EXAMPLES…

OUR ANALYSIS COMES FROM TWO KEY SALES DRIVERS

WHO BUYS THE BRAND (AT ALL)?

Household (HH) Penetration: *The percentage of the population (or segment) that buys the brand at least once during the year.*

HH Penetration Index: *The ratio of a segment's HH Penetration to the total US population's HH Penetration.*

Example: *35.7% of total HHs bought "Brand X" last year, including 32.9% of Joan HHs. Joan's HH Penetration Index = (32.9%/35.7%) =* ***0.92****.*

WHO BUYS THE BRAND HEAVILY?

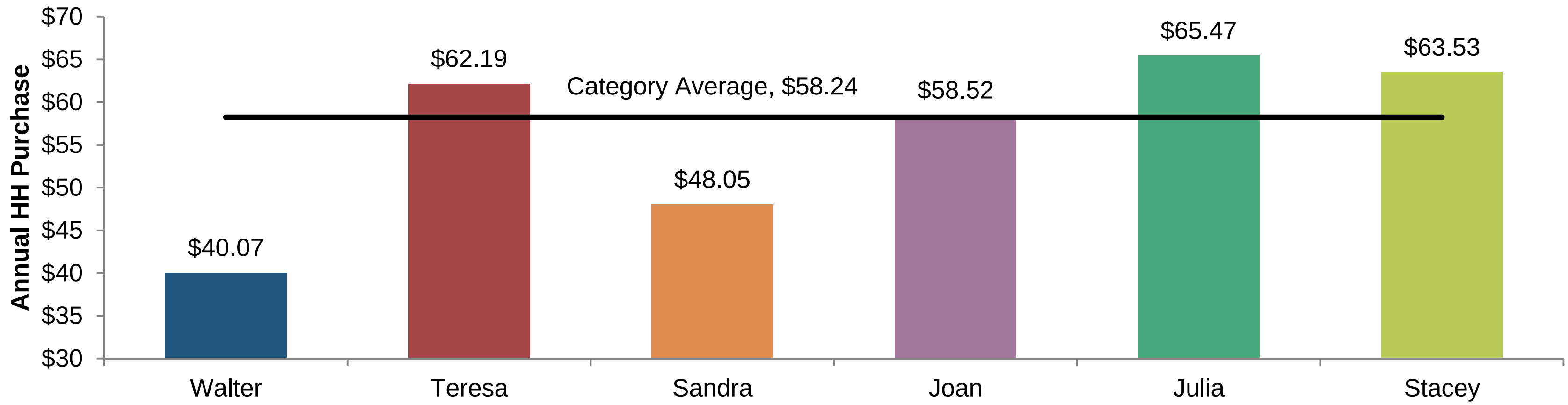
Heavy Buyer: *A consumer who buys the brand enough to put him/her in the top tier (usually top 20%), measured by purchases in dollars.*

Heavy Buyer Share: *What percentage of the population (or segment) are Heavy Buyers as defined above.*

Heavy Buyer Index (HBI): *The ratio of the segment Heavy Buyer Share to the total US population's Heavy Buyer Share.*

JULIA HAS HIGHEST HH PURCHASE IN YOGURT CATEGORY

As a product category, yogurt is associated with “Better for You,” which is why segments **Julia** and **Stacey** lead all others in annual *household* purchases of the product.



Category annual HH purchase calculation based on data reported by Nielsen through its Homescan Service for the 52-week period ending Sep 20, 2014 for the US market. Copyright © 2014, Nielsen.

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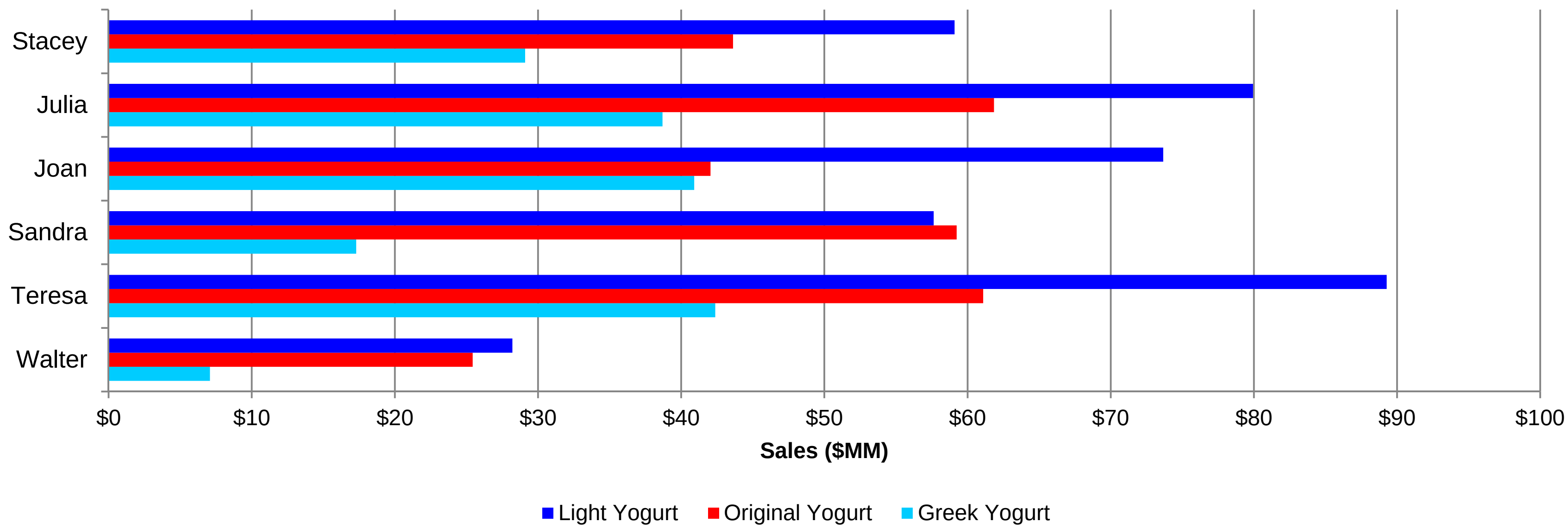
LIGHT YOGURT HAS BROAD APPEAL

Light Yogurt has a strong appeal even to consumers who profess concerns about artificial sweeteners, like **Julia** and **Stacey** who both buy much more Light Yogurt than the other two Yogurt brands we've looked at.



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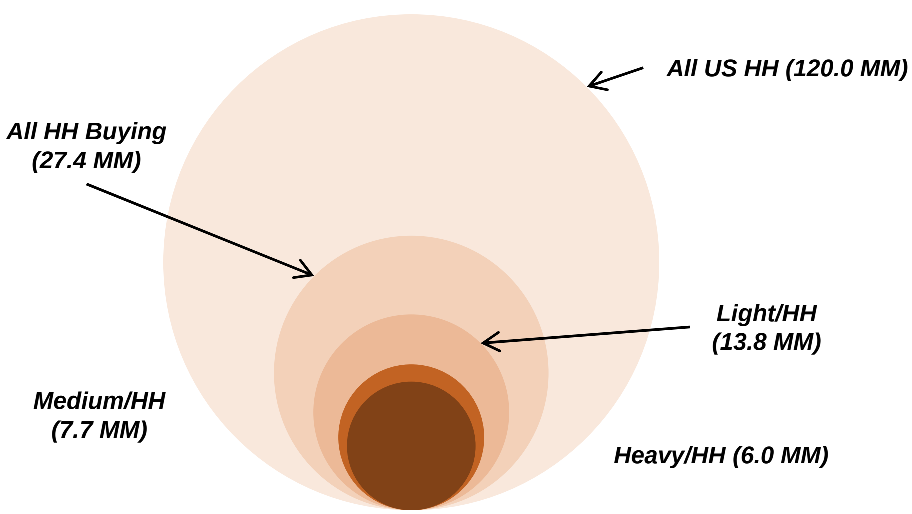
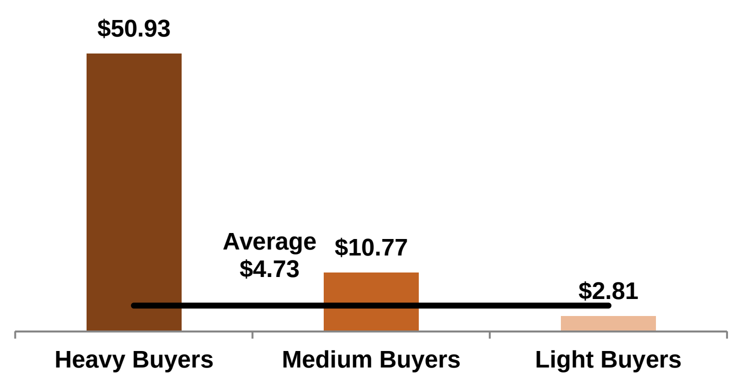
27 MILLION HOUSEHOLDS BOUGHT LIGHT YOGURT IN 2014

Light Yogurt's 6.0 Million Heavy Buyers Are Key to the Brand



Heavy Buyers Spent 4x More Than Medium Buyers in 2014



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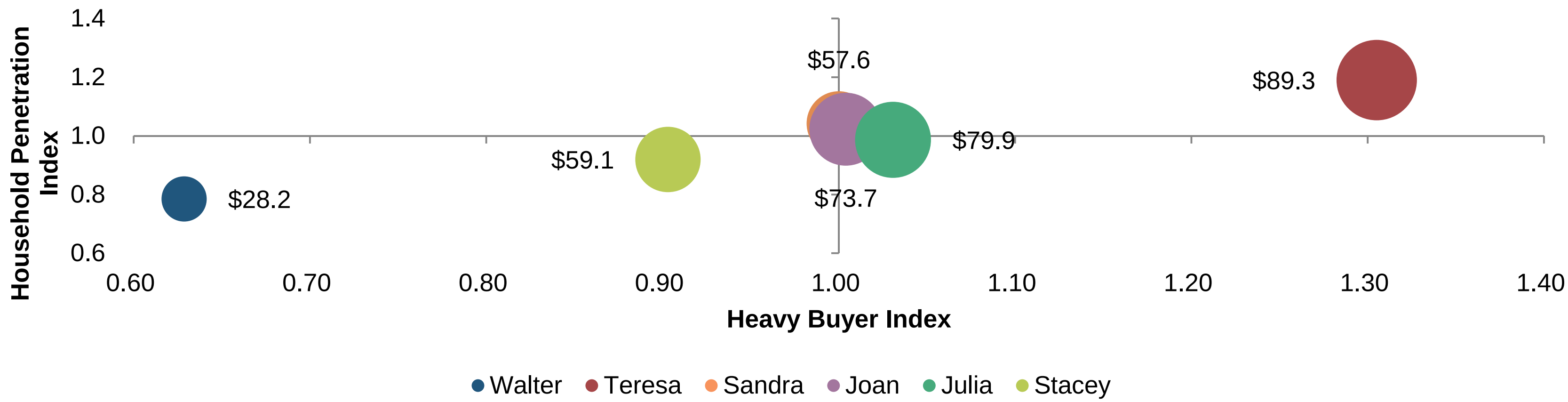
EVEN MINDFUL MOMS SKEW TOWARD HEAVY BUYING OF LIGHT YOGURT

Teresa is much more likely to be a Light Yogurt heavy buyer (which links to her dieting); but she is followed closely by **Julia** – who is mindful of calories, despite her expressed concern about sweeteners and artificial ingredients.



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SO WHAT'S THE NET?

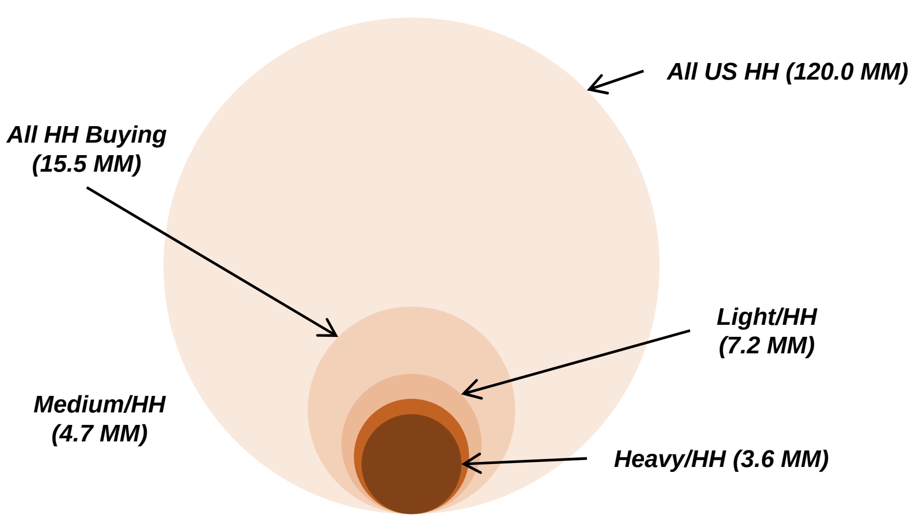
Light Yogurt has a broad appeal that produces heavy buying from five out of six segments. The reduced calorie issue is important in yogurt and drives heaviest buyer **Teresa** who diets to lose weight. Both mindful **Julia** and diabetic **Joan** buy Yogurt heavily, too.

Stacey produces about 8% fewer heavy buyers for Light Yogurt than the average, probably driven by her expressed concerns about sweeteners and artificial ingredients, and her preference for premium and niche brands.

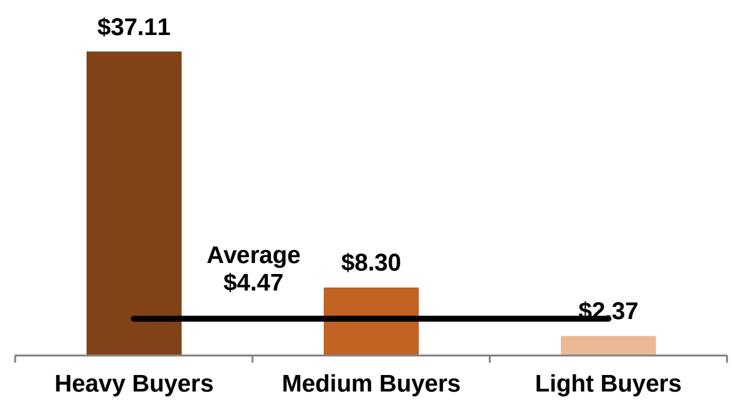
This is a mainstream brand that "works" overall for BFY segments.

15 MILLION HOUSEHOLDS BOUGHT LIGHT GREEK IN 2014

Light Greek's 3.6 Million Heavy Buyers Are Key

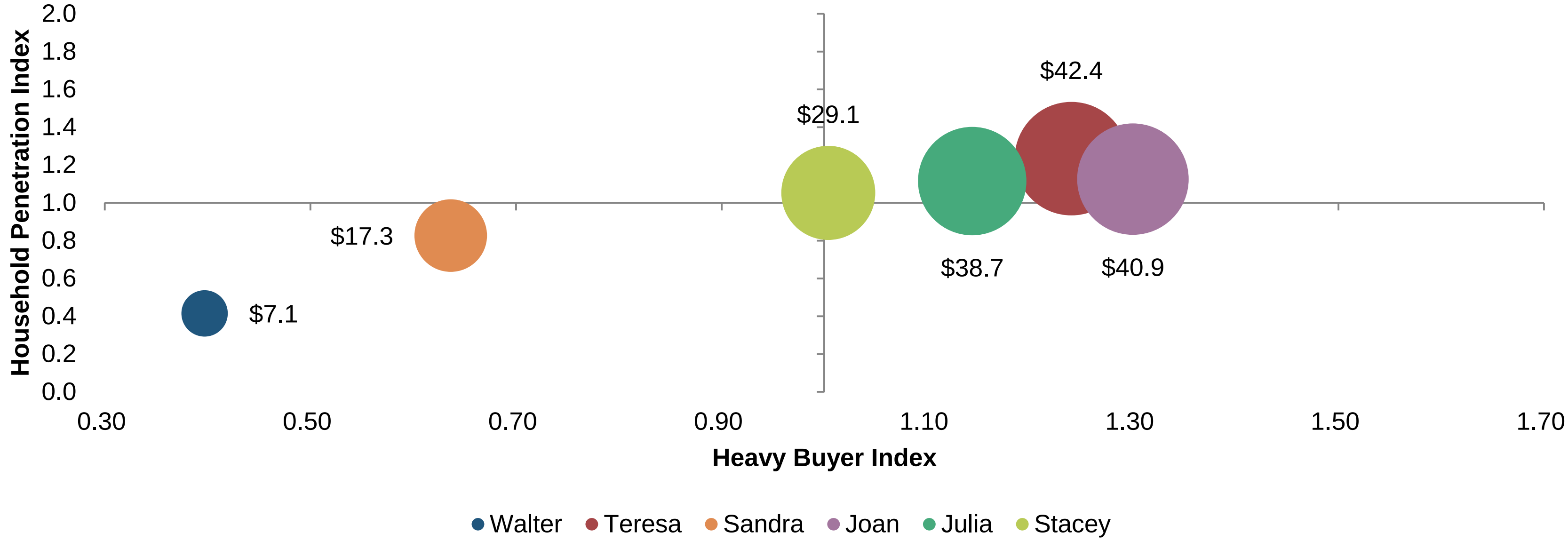


Heavy Buyers Spent 3x More Than Medium Buyers in 2014



LIGHT GREEK DOES WELL WITH DIETERS

The volume buyers of Light Greek all have diet or ingredient concerns; but the two heaviest buyers, **Joan** and **Teresa**, are concerned about managing diabetes and diet.



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SO WHAT'S THE NET?

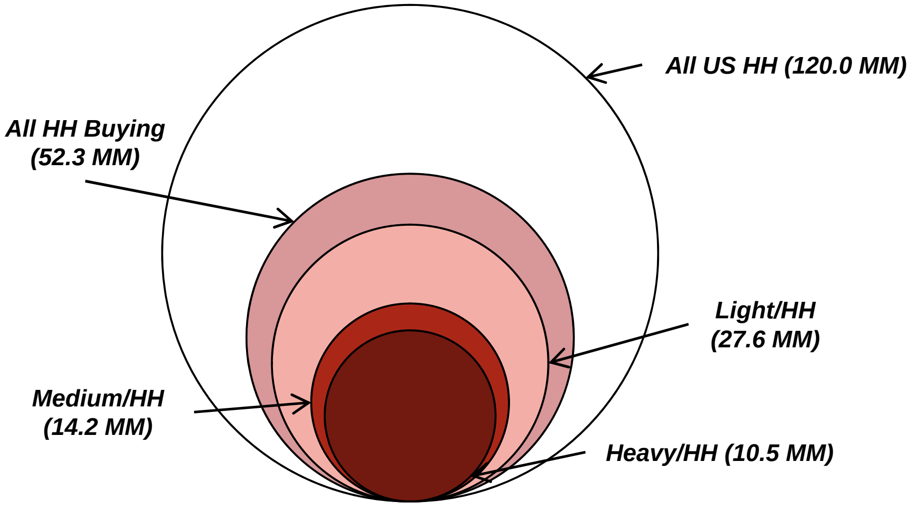
Light Yogurt's heaviest buyer is diabetic **Joan**, who is very consistent in her preference for brands that offer tasty reduced-calorie products – much like **Teresa**, who diets to lose weight.

Heavy category buyer **Julia** likes this brand also, while **Stacey** buys this brand at an average rate (the only Yogurt brand she does that for), likely because her affinity for Greek yogurt outweighs her concerns about artificial sweeteners.

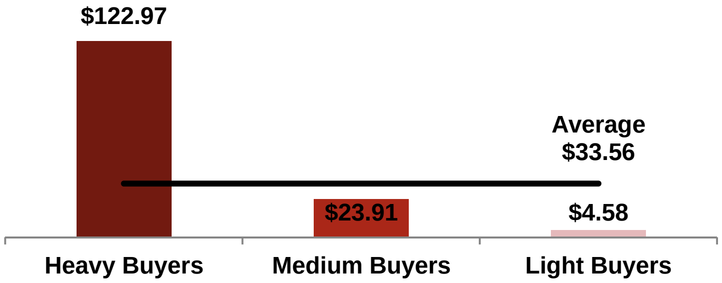
Light Greek brand hits its intended target: passionate yogurt buyers who either are generally or specifically trying to reduce calories.

52 MILLION HOUSEHOLDS BOUGHT COLA IN 2014

Cola's 10.5 Million Heavy Buyers Are Key to the Brand

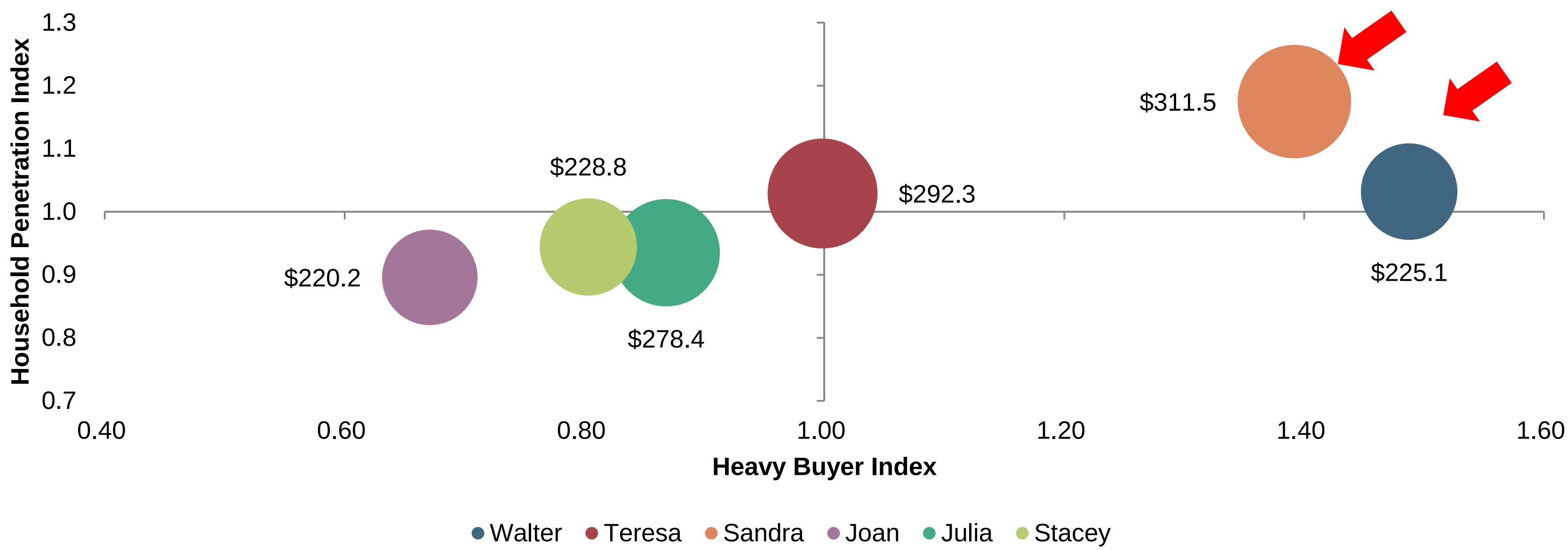


Heavy Buyers Spent 4x More Than Medium Buyers in 2014



COLA DRAWS HEAVY BUYERS FROM ALL SEGMENTS

“No Health Worries” **Walter** and **Sandra** are the heaviest buyers of Cola. **Joan** produces the fewest heavy buyers because she wants reduced-calorie brands, like Diet Cola.
BFY **Julia** has a lower-than-average HBI, but ranks third in overall purchase volume ($).



Bubble size represents sales in millions.

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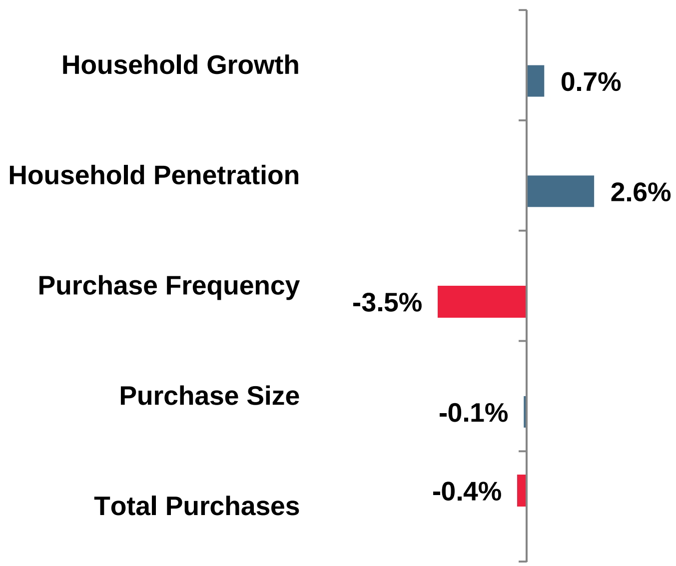
DROP IN PURCHASE FREQUENCY YIELDS FLAT SALES

Change in Purchases 2013-14



What Drove the Change?

- US households grew by about 0.8 million (0.7%).
- Total US HH buying Cola grew by 2.6%.
- ***Consumers purchased Cola 3.5% less often on average. Heavy buyers were down almost 6%; Light and Medium buyers were up 2% to 3%.***
- Consumers spent the same amount on Cola when they bought it.
- Net result: a reduction in overall purchases of less than 1%.

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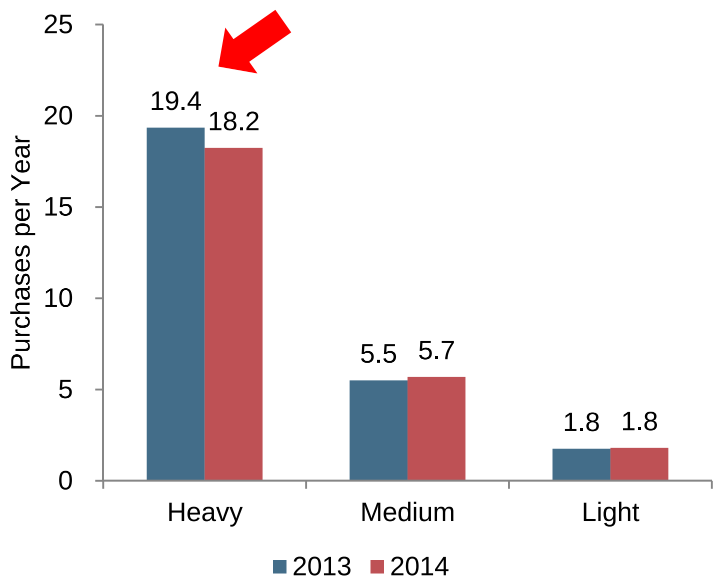
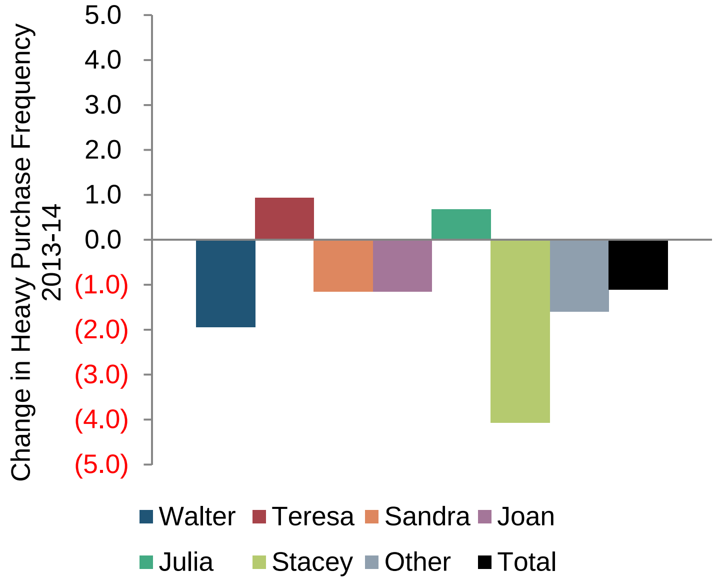
PURCHASE FREQUENCY FELL AMONG HEAVY BUYERS FOR NEARLY ALL SEGMENTS

Purchase Frequency 2013-14 by Usage



Purchase Frequency 2013-14 by Segment



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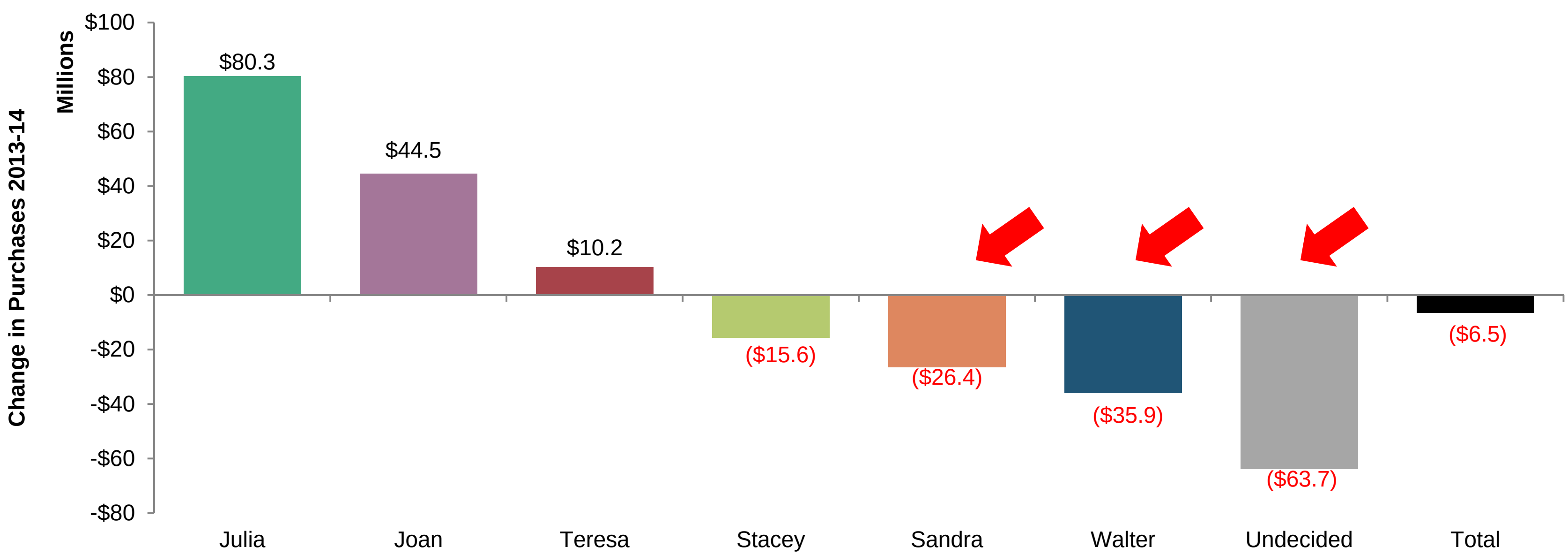
HEAVY BUYERS WALTER AND SANDRA ACCOUNT FOR MUCH OF LOST VOLUME

The drop in YOY purchase is coming from Soda's traditionally strongest buying segments: **Walter**, **Sandra** and **Undecided**. BFY **Julia** spent $80 million more on Cola in 2014 than she did in 2013.



WALTER IS BUYING LESS COLA AT A HOUSEHOLD LEVEL

Change in Total Purchases 2013-14

	2013	2014	Change	Change in %
Households (Millions)	10.6	11.1	0.5	5.2%
Penetration Rate	50.7%	45.0%	-5.7%	-11.3%
Buying Households (Millions)	5.4	5.0	(0.4)	-6.7%
Purchase Frequency	7.8	7.4	(0.4)	-5.7%
Purchase Size	$6.23	$6.11	($0.13)	-2.0%
Annual Purchases Per Household	$48.65	$44.96	($3.68)	-7.6%
Annual Purchases	$261.0	$225.1	($35.9)	-13.7%

Walter in 2014: Fewer Buyers Buying Less and Less Often

- By every measure, Walter's consumption of Cola has fallen.
- Household penetration – The ratio of Walter households buying Cola fell sharply, but the impact was muted by the growth in the number of Walter HHs.
- Annual purchases per household fell by 7.6% – purchase size and frequency both contributed to the decline, but frequency was more important.
- *Sweeteners are not an issue for Walter, but price (value) and taste are. Is pricing behind Walter's changing purchase habits?*

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SANDRA IS BUYING 17% LESS COLA AT A HOUSEHOLD LEVEL

Change in Total Purchases 2013-14

	2013	2014	Change	Change in %
Households (Millions)	15.1	15.6	0.5	3.5%
Penetration Rate	47.6%	51.2%	3.6%	7.6%
Buying Households (Millions)	7.2	8.0	0.8	11.3%
Purchase Frequency	7.4	6.9	(0.5)	-7.3%
Purchase Size	\$6.34	\$5.67	(\$0.67)	-10.6%
Annual Purchases Per Household	\$47.04	\$38.96	(\$8.08)	-17.2%
Sandra Annual Purchases	\$337.9	\$311.5	(\$26.4)	-7.8%

Sandra in 2014: More Buyers Buying Much Less, Less Often

- Sandra's consumption of Cola has fallen dramatically at the household level.
- Household penetration – The ratio of Sandra households buying Cola has grown, as have the number of Sandra HHs, netting an 11.3% increase in HH purchasing.
- Annual purchases per household fell by 17.2% – purchase size and frequency both contributed to the decline – purchase size was the more important of the two
- *Like Walter, sweeteners are not an issue for Sandra, but price (value) and taste are. Is pricing behind Sandra's changing purchase habits?*

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SO WHAT'S THE NET?

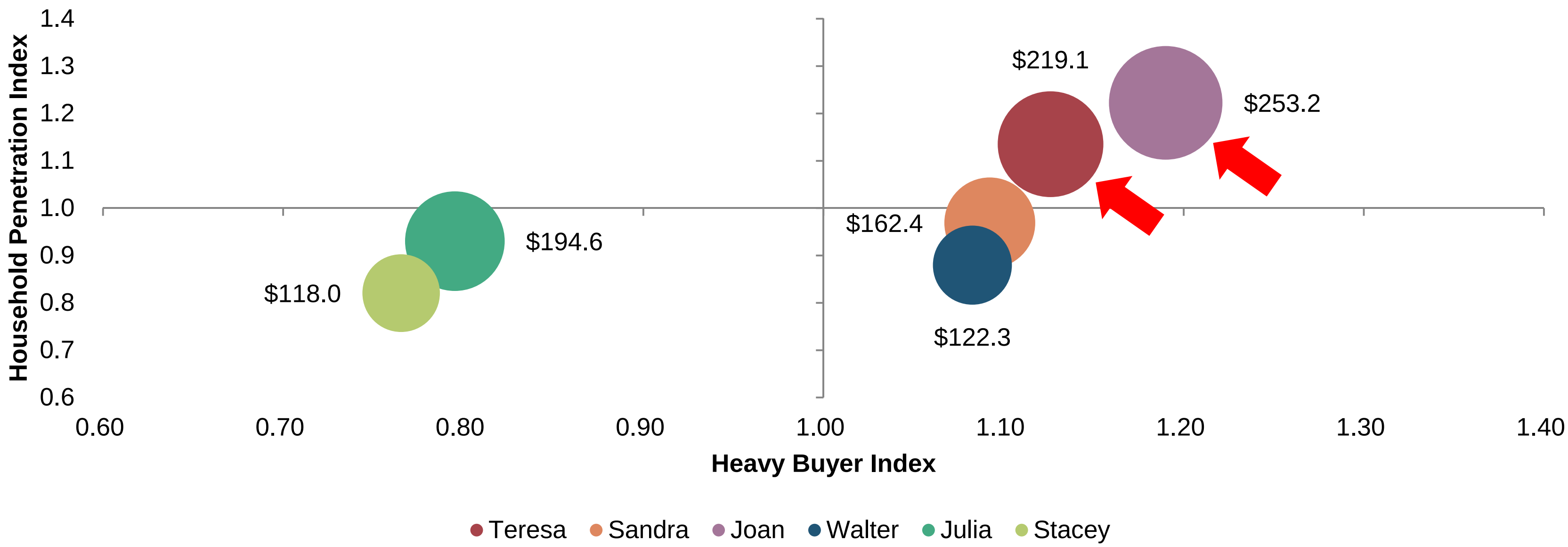
Soda's stagnant sales tie directly to drops in purchase frequency and size by the heaviest buying segments, **Walter** and **Sandra**, who are both highly price-driven.

Among the BFY segments, **Julia** has shown a big jump in total YOY purchases and in the Heavy Buyer Index; **Stacey** has shown a slight decrease in YOY purchases, but has risen in the HBI.

Concerns about sweeteners aren't driving sales issues for Cola.

DIETERS AND DIABETICS ARE DEVOTED TO DIET COLA

Diabetic **Joan** leads Diet Cola in both HBI and HPI, and she favors Diet Cola over Cola because of the sugar content. She is followed closely by dieter **Teresa**, who is also looking to reduce calories (sugars) and is not overly concerned about sweetener type.



Bubble size represents 2014 sales in millions.

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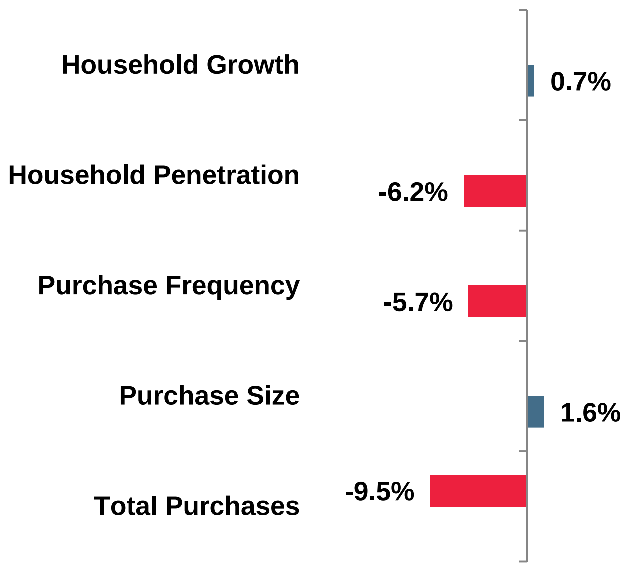
DROPS IN HH PENETRATION, PURCHASE FREQUENCY DRIVE DECLINE

Change in Purchases 2013-14



What Drove the Change?

- US households grew by about 0.8 million (0.7%).
- The number of HHs buying Diet Cola shrank by 6.2%, with big reductions in Heavy and Light buyers offset by gains in Medium buyers.
- ***Consumers purchased Diet Cola 5.7% less often on average. Heavy buyers were down over 6%; Light and Medium buyers were down 4% to 5%.***
- Consumers spent more on Diet Cola when they bought it (mainly Heavy and Medium buyers).
- Net result: Overall purchases fell nearly 10%.

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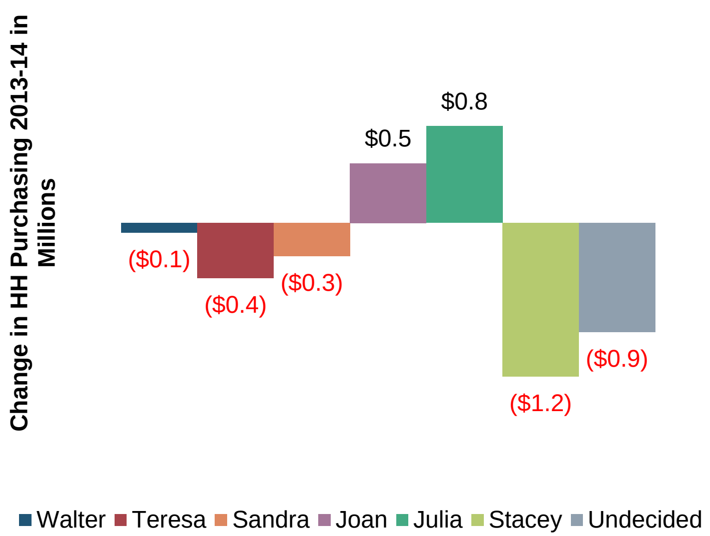
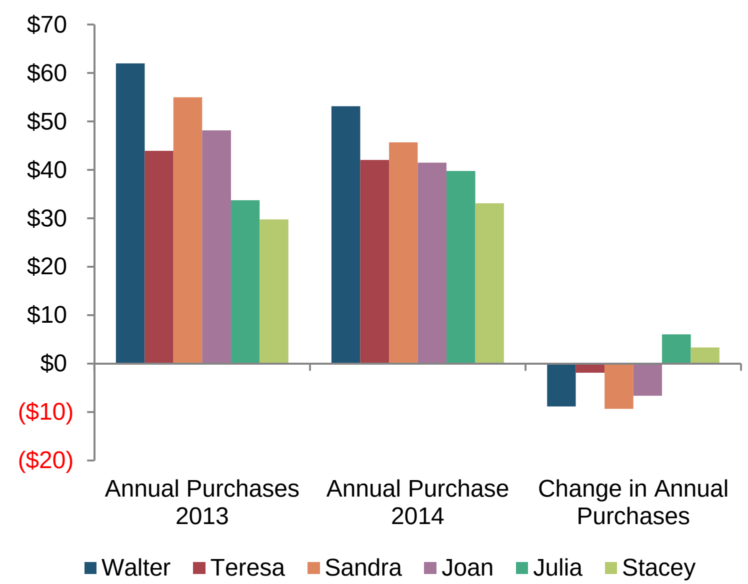
ONLY JULIA AND STACEY BOUGHT MORE DIET COLA IN 2014 THAN IN 2013

Julia and Joan Increased HH Purchasing 2013-14



Julia and Stacey Grew Annual Purchases 2013-14



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JULIA IS BUYING 18% MORE DIET COLA AT A HOUSEHOLD LEVEL

Julia: Change in Total Purchases 2013-14

	2013	2014	Change	Change in %
Households (Millions)	17.9	22.4	4.5	25.1%
Penetration Rate	23.0%	21.9%	-1.1%	-4.7%
Buying Households (Millions)	4.1	4.9	0.8	19.1%
Purchase Frequency	6.3	6.8	0.4	6.4%
Purchase Size	$5.32	$5.89	$0.57	10.8%
Annual Purchases Per Household	$33.73	$39.78	$6.05	17.9%
Julia Annual Purchases	**$138.5**	**$194.6**	**$56.1**	**40.5%**

Julia in 2014: More Buyers Buying More, More Often

- By almost every measure, Julia's consumption of Diet Cola has risen – only half due to increase in HHs.
- Household penetration for Julia HHs buying Diet Cola fell by 4.7%; but this was more than offset by growth in the number of Julia HHs – netting to a big increase in Buying HHs.
- Annual purchases per HH grew by nearly 18%; both purchase size and frequency contributed to the rise.
- ***Sweeteners are an issue for Julia, and she is still among the least likely to produce Heavy buyers; but she is the only segment that is growing for Diet Cola.***

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SANDRA IS BUYING 17% LESS DIET COLA AT A HOUSEHOLD LEVEL

Change in Total Purchases 2013-14

	2013	2014	Change	Change in %
Households (Millions)	15.1	15.6	0.5	3.5%
Penetration Rate	25.3%	22.8%	-2.6%	-10.2%
Buying Households (Millions)	3.8	3.6	(0.3)	-7.1%
Purchase Frequency	7.9	7.1	(0.8)	-10.7%
Purchase Size	$6.92	$6.43	($0.49)	-7.0%
Annual Purchases Per Household	$55.00	$45.67	($9.33)	-17.0%
Sandra Annual Purchases	**$210.4**	**$162.4**	**($48.0)**	**-22.8%**

Sandra in 2014: Fewer Buyers Buying Less, Less Often

- Sandra's consumption of Diet Cola has fallen dramatically at the household level.
- Household penetration – the ratio of Sandra households buying Diet Cola has fallen by over 10%, but was partially offset by an increase in the number of Sandra HHs.
- Annual purchases per household fell by 17% – and declines in both purchase size and frequency were driving change.
- ***Sweetener is not an issue for Sandra, but price (value) and taste are. Is pricing behind Sandra's changing purchase habits?***

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SO WHAT'S THE NET?

Diet Cola's four heaviest buying segments are drinking less Diet Cola. For example, **Sandra** showed the biggest drop in overall purchases YOY, due to significant declines in ALL key sales drivers: HH penetration, purchase size and frequency. Sweetener choice is NOT a driver for these segments, but for many (**Sandra** and **Walter**) price is.

BFY **Julia** is a bright spot. She is trending up in both purchase size and frequency. Sweetener is an issue for her, so she produces relatively fewer heavy buyer; however, she is still an important buyer of Diet Cola.

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"SAY VS. DO" ALWAYS AT WORK.
CONSUMERS MOVE TOWARD MINDFUL BALANCE.
MINDFUL MARKETING WILL DRIVE GROWTH.

PUT "MINDFUL MARKETING" INTO ACTION

- Are you incurring unnecessary costs to develop or promote HFCS-free products that few of your consumers care about?
- Instead, should you consider reducing added sugars overall in your products, to help meet the needs of more mindful consumers?

LET'S CONTINUE THE CONVERSATION

Stay in touch and stay informed on your favorite social media sites.

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- Get the latest consumer research content on *YouTube* and *SlideShare*.
- Connect with your peers and ask questions on our *LinkedIn Group*.

THANK YOU

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APPENDIX

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