



SHOPPER PANEL SPOTLIGHT

What's really in consumers' minds in their quest for food and beverage? To help you understand the motivations and opinions behind purchase behavior, FONA put together a panel of shoppers. The group spans the spectrum from Clean Savvy to Clean Avoider (visit www.fona.com/clean for details about the personas.) The group gets regular check-ins, and we share our learnings with you!



KEY FINDINGS

Consumers are focusing more on their health than ever before and sugar is one ingredient that is highly scrutinized on product labels. But while many of our panelists are concerned with the amount of sugar they consume, they are not consuming less sugar than one year ago. Of note, sugar and honey are also the top sweeteners they turn to when sweetening food and beverages.



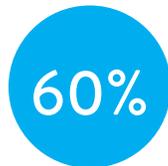
say taste is more important than grams of sugar per serving in food & beverages



are reducing the amount of sugar in their diets because of health concerns



are looking for natural sweeteners when purchasing new products



are concerned about the amount of sugar they consume

This week, our shopper panel takes on...

SUGAR

CONSUMPTION

Our panelists were asked about their attitudes and motivations for sugar reduction and their sugar and sweetener consumption. We asked if they were taking a closer look at products they regularly consumed to see how much sugar they are consuming. For some, it was eye opening!

WHAT'S MORE IMPORTANT?

We asked our shopper panel, what product attributes (grams of sugar per serving, price or taste) are more important when purchasing food & beverage products?

"Sugar content. [If it's] too much or in the top 5 ingredients, it's out." – Sarah P.

"If I had to choose, it's almost always price for me!" – Zach S.

"I will pay more for things I like, so taste is higher on my list." – Christine B.

"Oh, my goodness, this is an eye opener!"

Is what Christine B. said after tracking the grams of sugar she consumed in 1 week. Below is her log and comments about her week.

- I actually avoided things I wanted after looking at daily totals.
- I was on vacation last week, so there are some splurges here.
- I realized I never actually logged food before, in terms of sugar grams.
- Wow. Tuesday included a large margarita and Sunday included one beer. That would not be a typical week, but I was off work.

| DAY | GRAMS OF SUGAR |
|--------------|----------------|
| TUESDAY | 100 g |
| WEDNESDAY | 32 g |
| THURSDAY | 21 g |
| FRIDAY | 27 g |
| SATURDAY | 25 g |
| SUNDAY | 67 g |
| MONDAY | 29 g |
| TOTAL | 300 g |



KATIE D.

"I don't generally purchase products with lots of added sugar – both artificial and 'natural.'"



DEANA O.

"If I'm buying for me ... I won't buy. If buying for kids and husband I will check to see how much sugar is in a product. I may still buy it, but may limit their intake of the product."



MARK F.

"I am very unlikely to purchase foods that have added sugar in them."



THEO H.

"If I have a choice, I'll choose the lower sugar product - but I shy away from those using artificial sweetener."

ELIMINATION GAME

Top Items Panelists are Eliminating from Their Diets to Reduce Overall Sugar Intake



BAKED GOODS



CARBONATED SOFT DRINKS



FROZEN DESSERTS

THE TAKEAWAYS

1

Taste is Superior.

Most of our panelists stated that taste is more important than the amount of sugar in a food or beverage product. It always comes back to taste, no matter the category. Keep that in mind when formulating new products with lower sugar levels.

2

Eye Opener.

While we often think that consumers are in tune with what they are eating, many of our panelists have never tracked the amount of sugar they consume per day. Reducing their overall sugar intake is important, but they do so on a product- by-product basis. Ultimately that determines repeat purchases as they examine the product labels more closely.

All this might leave you with a bit of a challenge. We get it, and we can help.

Maybe you're working to reduce the sugar, but keep the same great taste. Maybe your product currently has artificial sweetener and you want to reformulate to natural alternatives. Maybe you're facing taste challenges and could use some advice. FONA's subject matter experts can help you keep that signature taste AND the label claims your consumers demand. Clean label spans the spectrum. Where does your product fit in? Let's talk. Contact us at: www.fona.com/chat or call 630-578-8600

WANT US TO ASK ABOUT SOMETHING SPECIFIC?

Our panel can help inform YOUR decisions. Let us know what you'd like us to find out from our shopper panel. Email POscarson@fona.com and let's dive in!