



## The “Lower-Calorie” Opportunity

First Global Soft Drinks Congress  
Choices for Tomorrow’s Consumer

Amsterdam, March 2-4, 2005

Unter Mitwirkung von



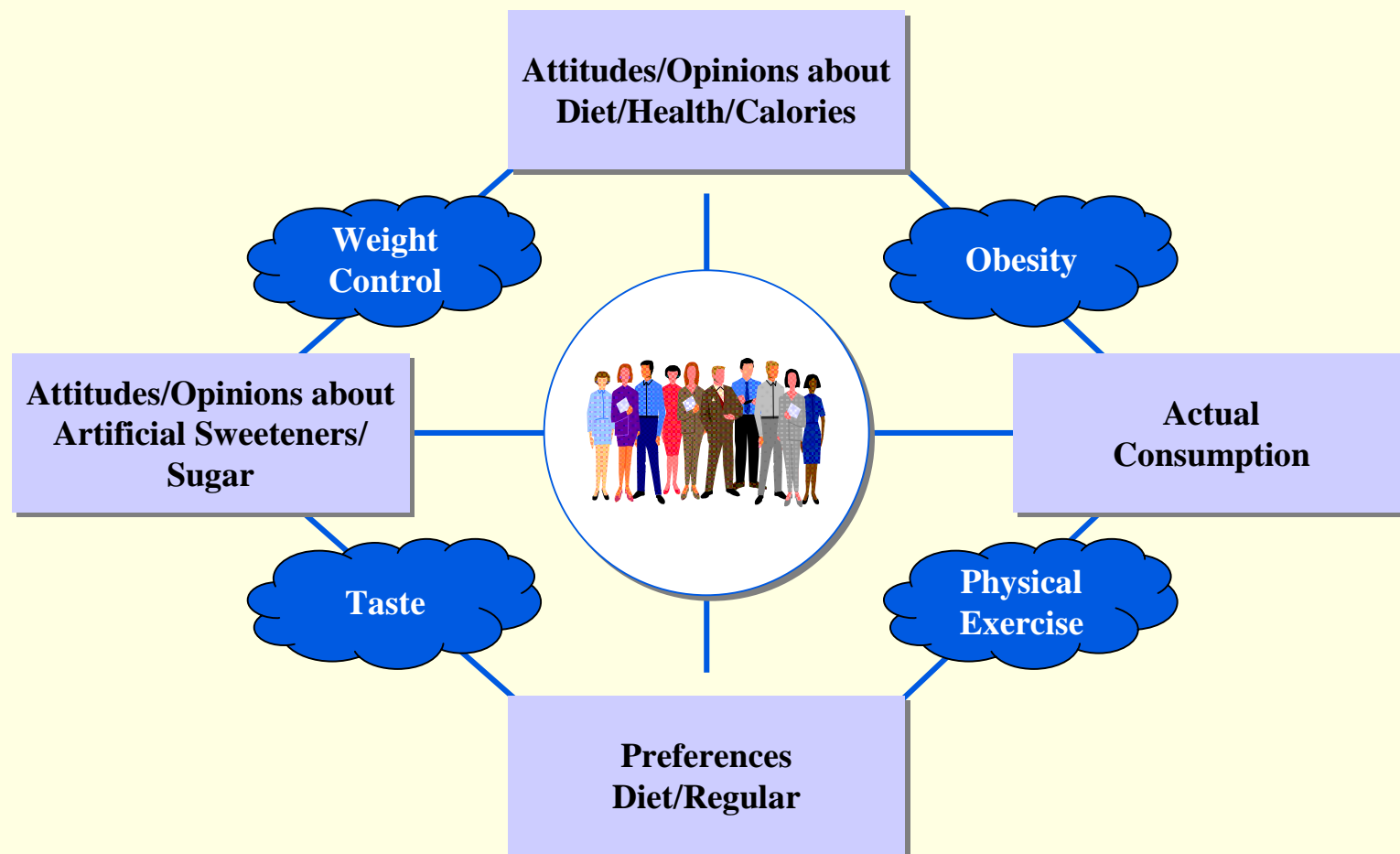
## “Lower Calorie” Product Examples - USA



## Methodology - Summary

- **Simmons Market Research Bureau, USA – syndicated study (24,000 consumers), 2002-2005; SMRB for Nutrinova: proprietary study (1,000 consumers), 2003**
- **British Market Research Bureau UK - syndicated study (24,000 consumers), 2004; Produkt & Markt for Nutrinova: proprietary study (400 consumers), 2002**
- **Typologie der Wünsche (TdWI) GER – syndicated study (25,000 consumers) 2004-2005; Produkt & Markt for Nutrinova: proprietary study (400 consumers), 2002**

## Driving Factors for the attractiveness of Lower Calorie Beverages



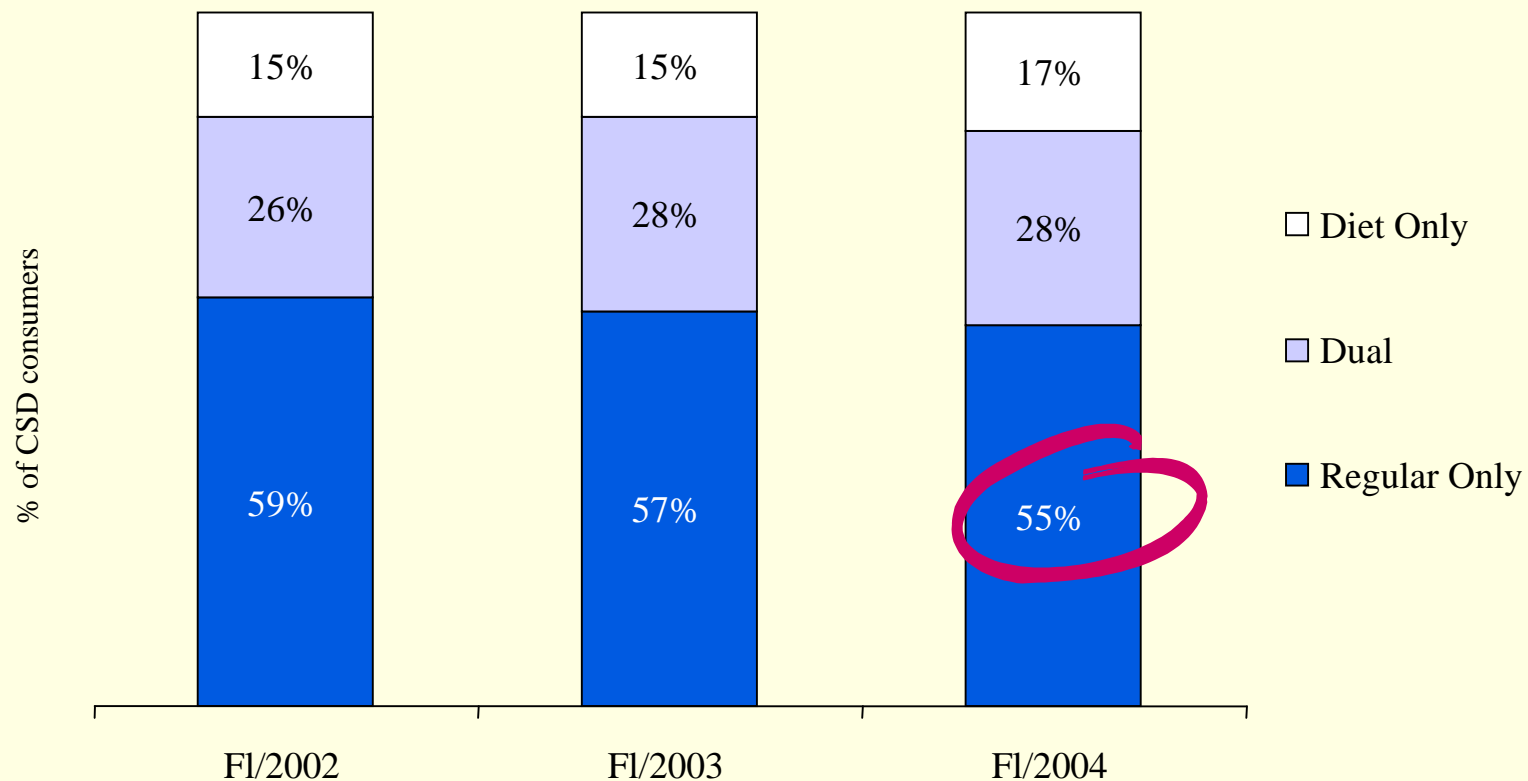
## Outline

- **The “lower calorie” consumer in the US**
- **The “lower calorie” consumer in the UK and Germany**

## The US “Lower Calorie” Consumer

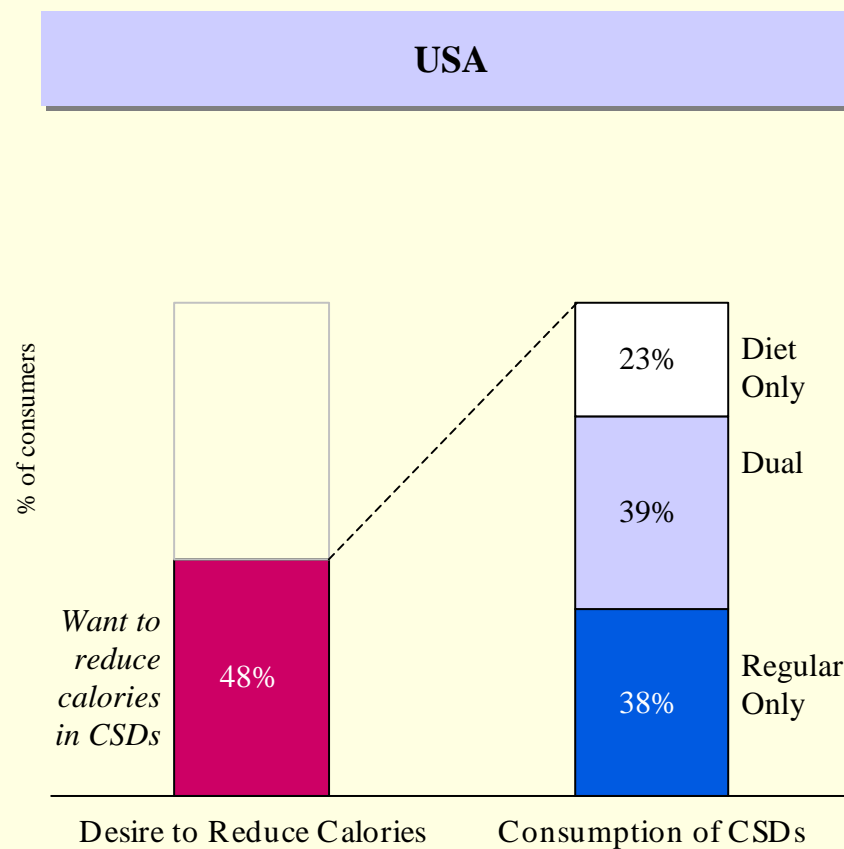
- **There are many consumers who want to reduce calories and don’t always consume Diet Soft Drinks.**
- **Dual Consumers and Regular Only Consumers who want to reduce calories (30%) want a perceivable calorie reduction and regular like taste.**
- **Calorie conscious consumers have more negative associations to sugar (59%) than positive and more positive associations to artificial sweeteners (55%) than negative.**
- **Since Diet Only Consumers are satisfied with “Diet Like Taste” and zero calories and Regular Only Consumers (with no desire for calorie reduction) merely want regular like taste, the creation of a “calorie right” segment with a perceivable reduction in calories and regular like taste enables to target an additional segment in the CSD market.**

## Development CSD Segments: Penetration for Regular Only Consumers is decreasing.



Simmons National Consumer Survey USA Fall 2002-Fall 2004 ©SMRB

# Consumers Desire to Reduce Calories and CSD Consumption

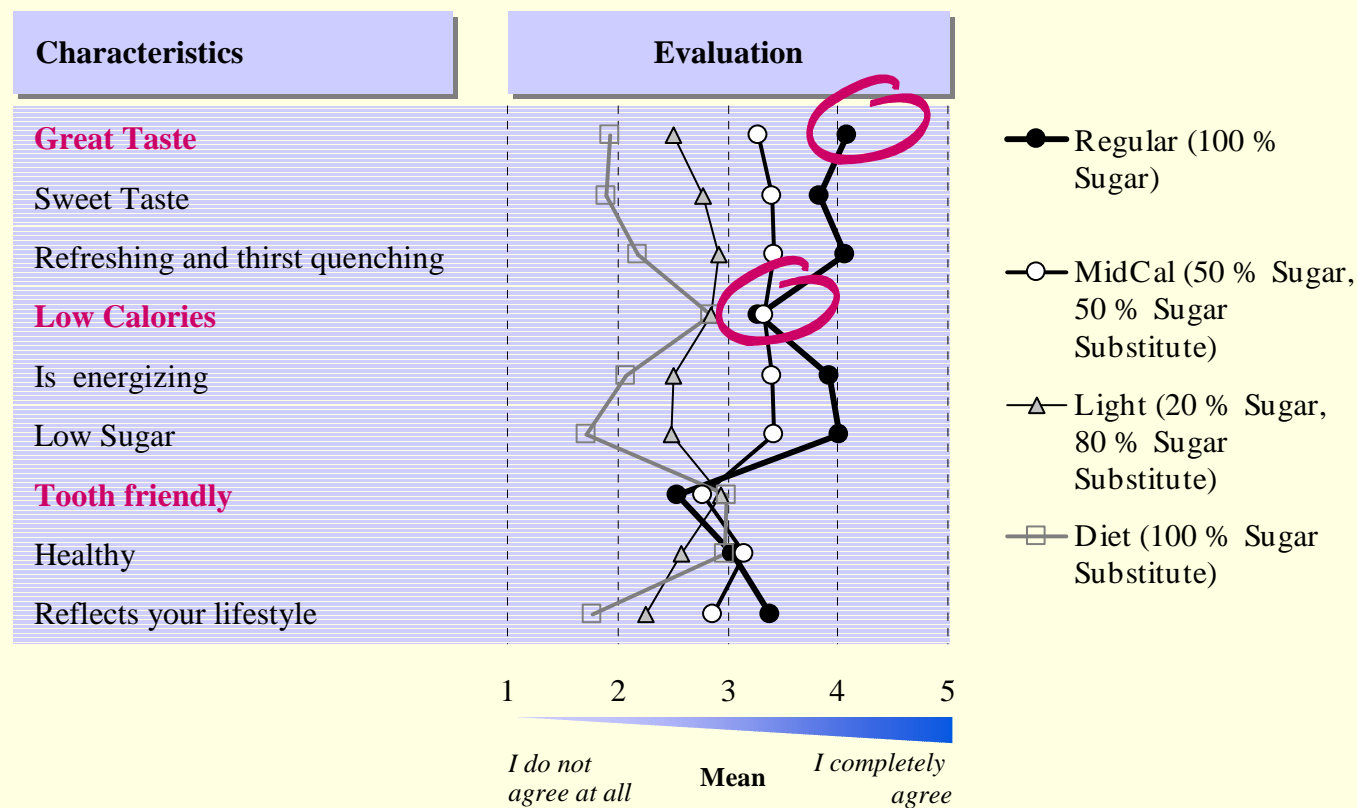


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## Mid Cal is perceived to be closer to Regular and Light closer to Diet.

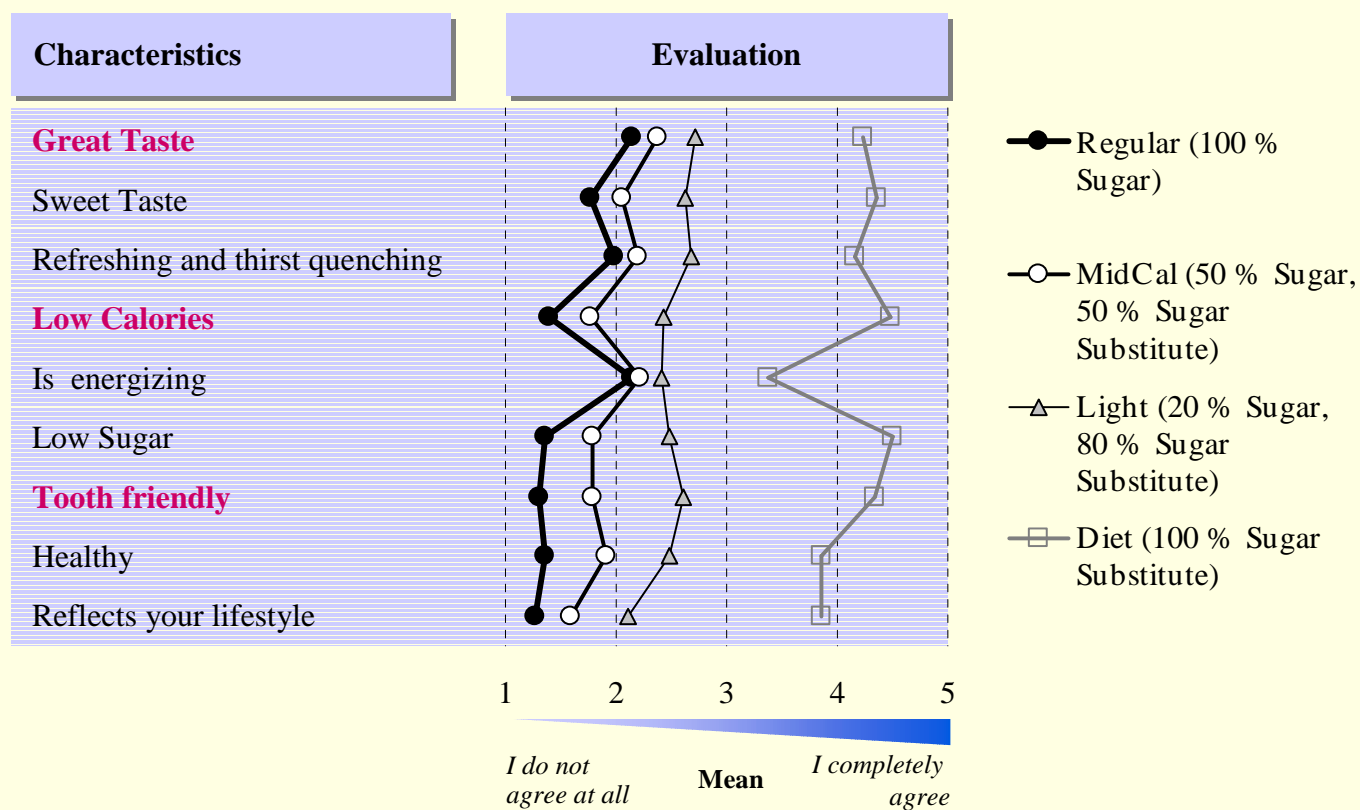
### Regular Only (Desire to Reduce Calories): Evaluation of Concepts



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**Regular and Diet Drinks are perceived to be very different; MidCal, Light and Regular are perceived similar.**

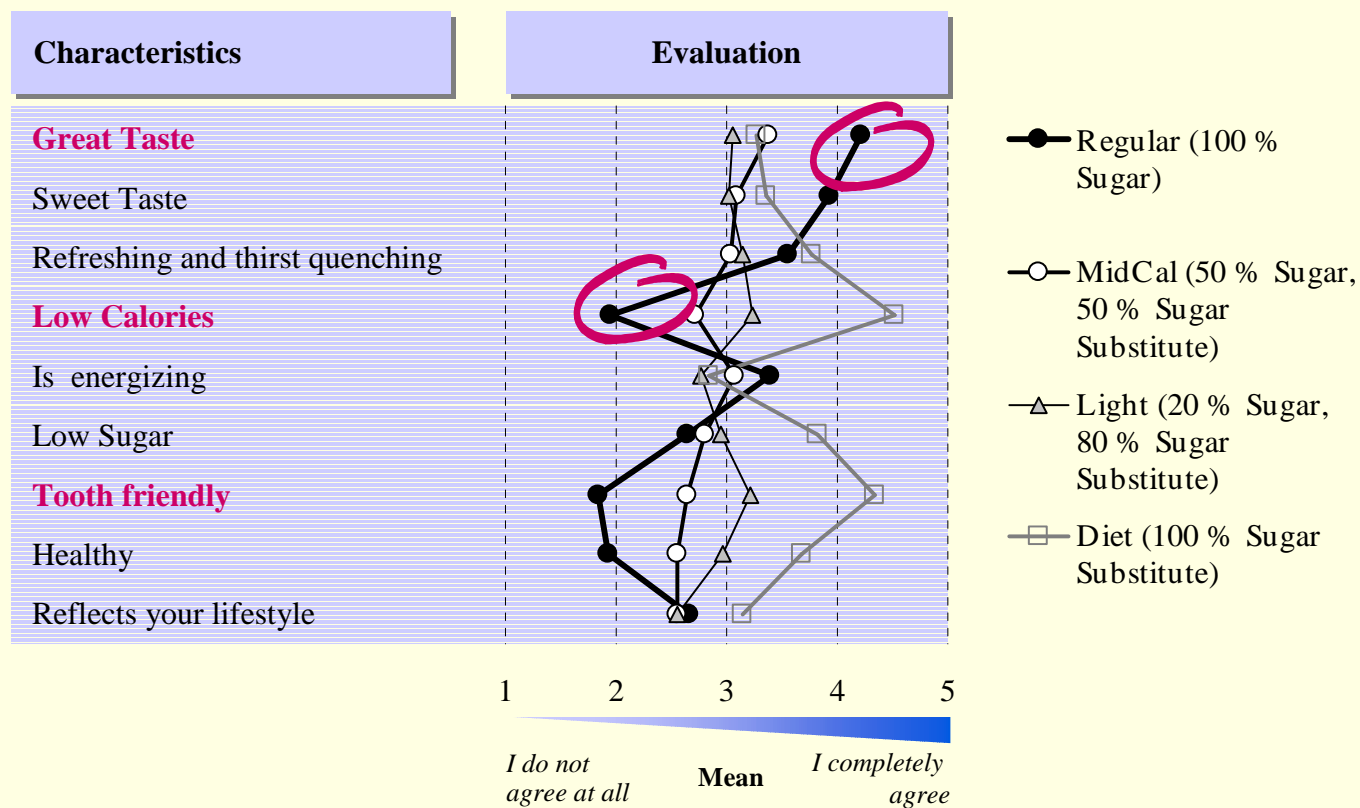
**Diet Only: Evaluation of Concepts**



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## Great taste and high reduction in calories best meets the Dual segment.

### Dual (Balancing Calories and Taste): Evaluation of Concepts



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## Outline

- **The “lower calorie” consumer in the US**
- **The “lower calorie” consumer in the UK and Germany**

## UK: Ribena

### Lower Calorie Positioning I



### Lower Calorie Positioning II



### Regular Positioning



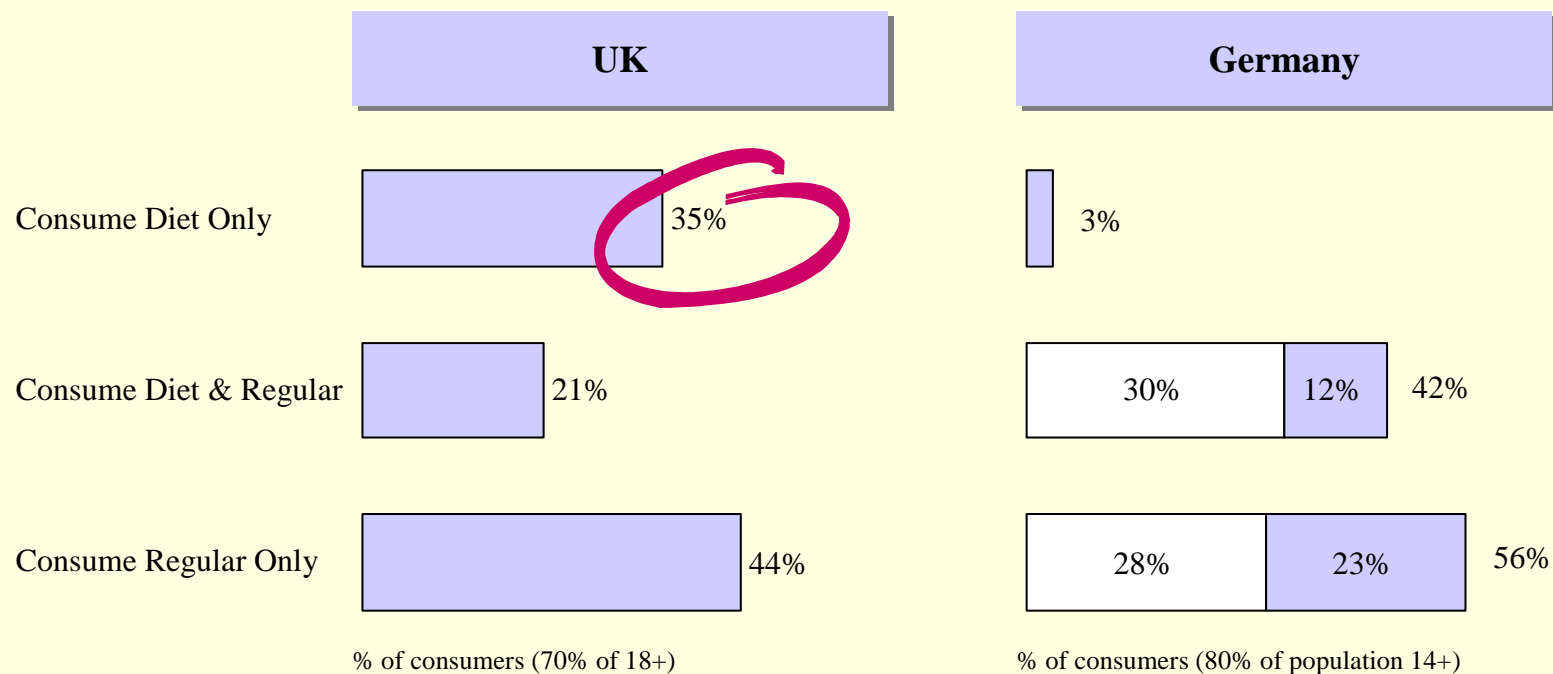
## Lower Calorie Product Examples - Europe




## UK and Germany

- **In Germany, consumers' preference for Diet and Regular, attitudes towards calories and actual consumption don't match at all.**
- **There is a large Diet Only segment in the UK already (in comparison to Germany).**
- **Consumers show more negative associations with sugar (67%) and more positive associations with artificial sweeteners (54%).**
- **Preference for Diet Soft Drinks are mainly driven by consumers' desire to reduce calories. General attitudes toward sugar and artificial sweeteners have no significant influence on preferences for Diet/Lower Calorie or Regular beverages.**
- **There is a larger potential for "lower calorie" products in Germany than in the UK. In the UK the "sugar replaced" regular products seem to represent a "third segment".**

## Penetration of Diet, Dual and Regular: Large Segment of Diet Only Consumers in the UK.



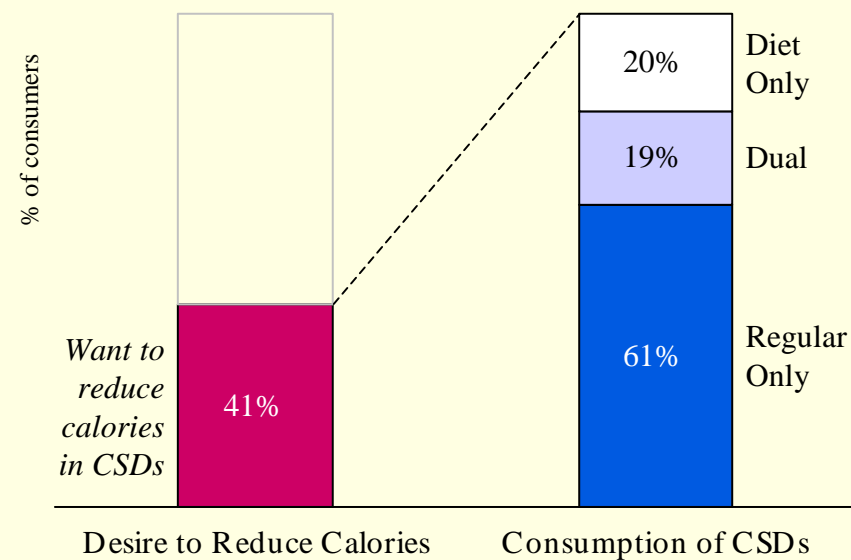
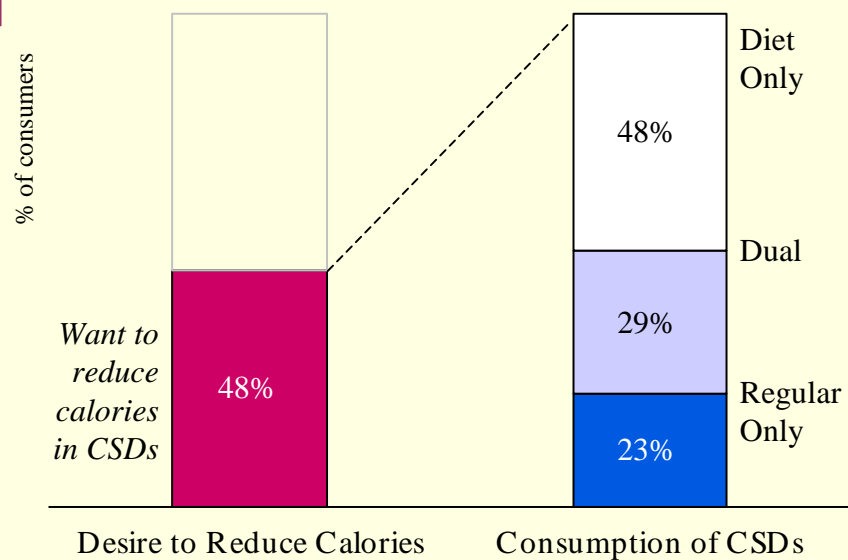
 Schorle consumers



# Consumers Desire to Reduce Calories and CSD Consumption

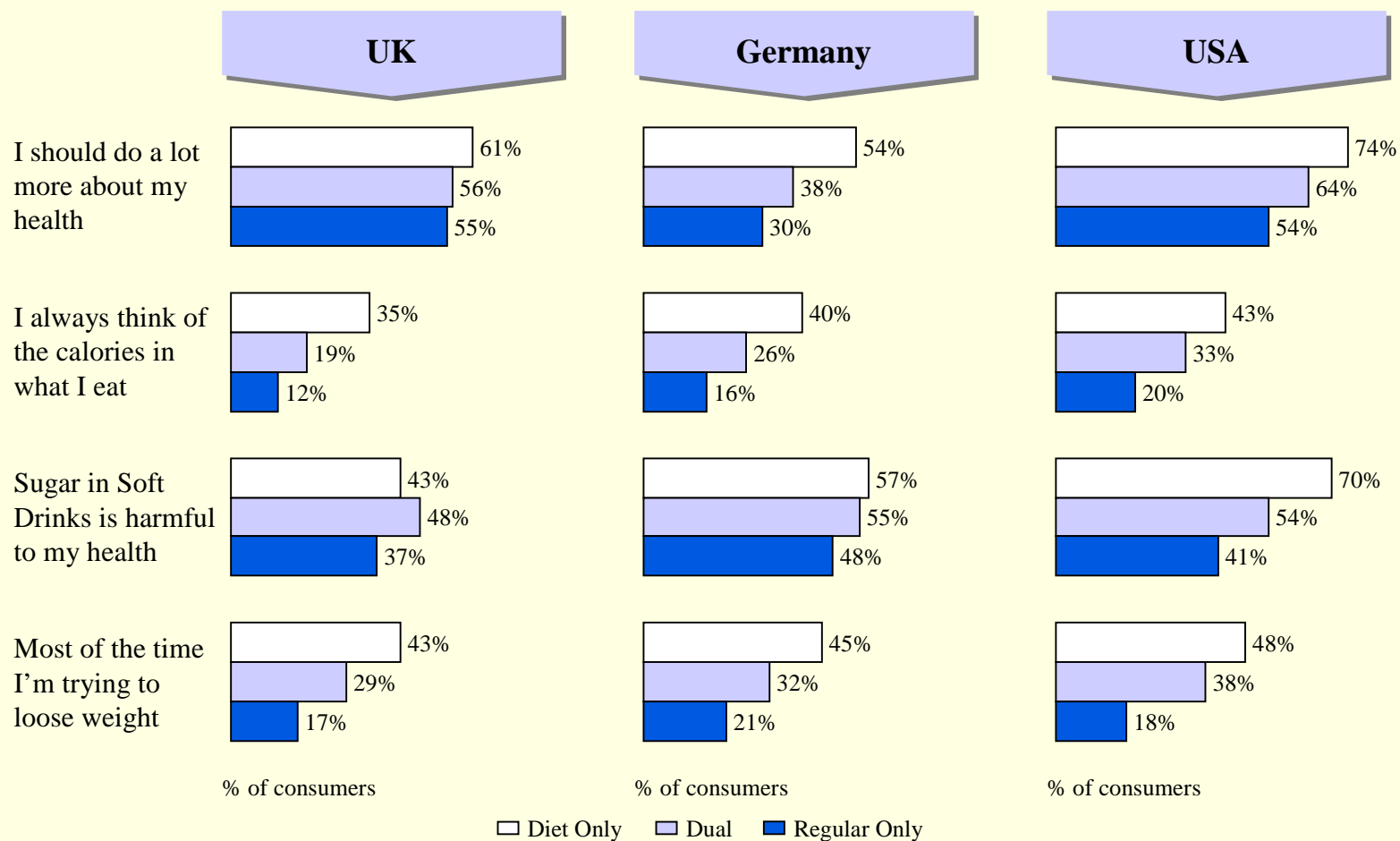
UK

Germany

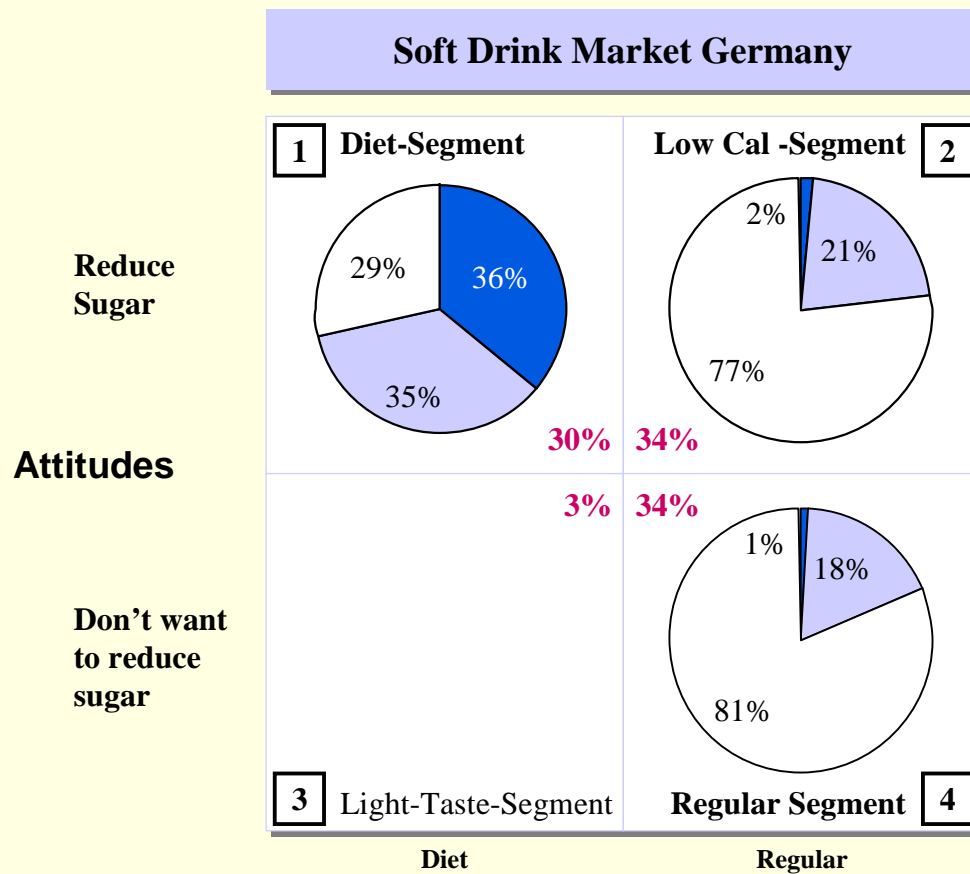


Produkt & Markt 2002  
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## Consumer Attitudes towards Health and Diet



## Summary Soft Drink Market - Germany

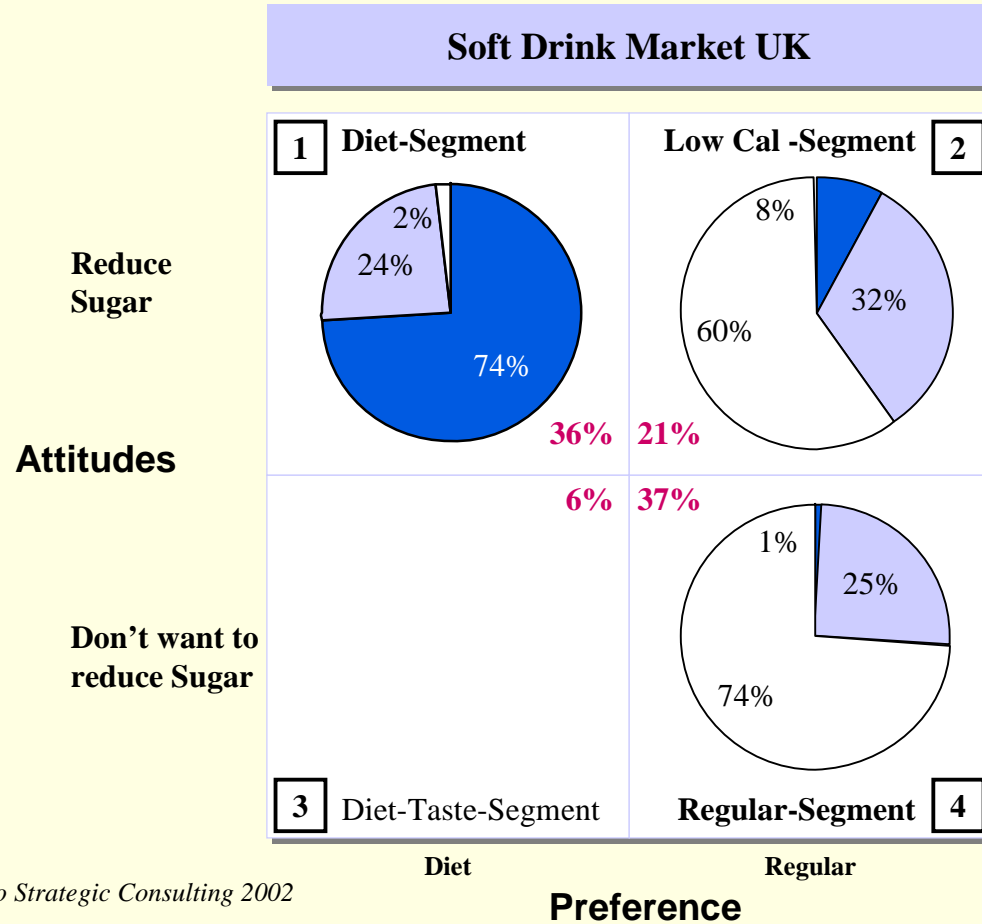


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Mid Cal Segment  
Global Marketing/ I.Knorr  
February 2005

## Summary Soft Drink Market - UK

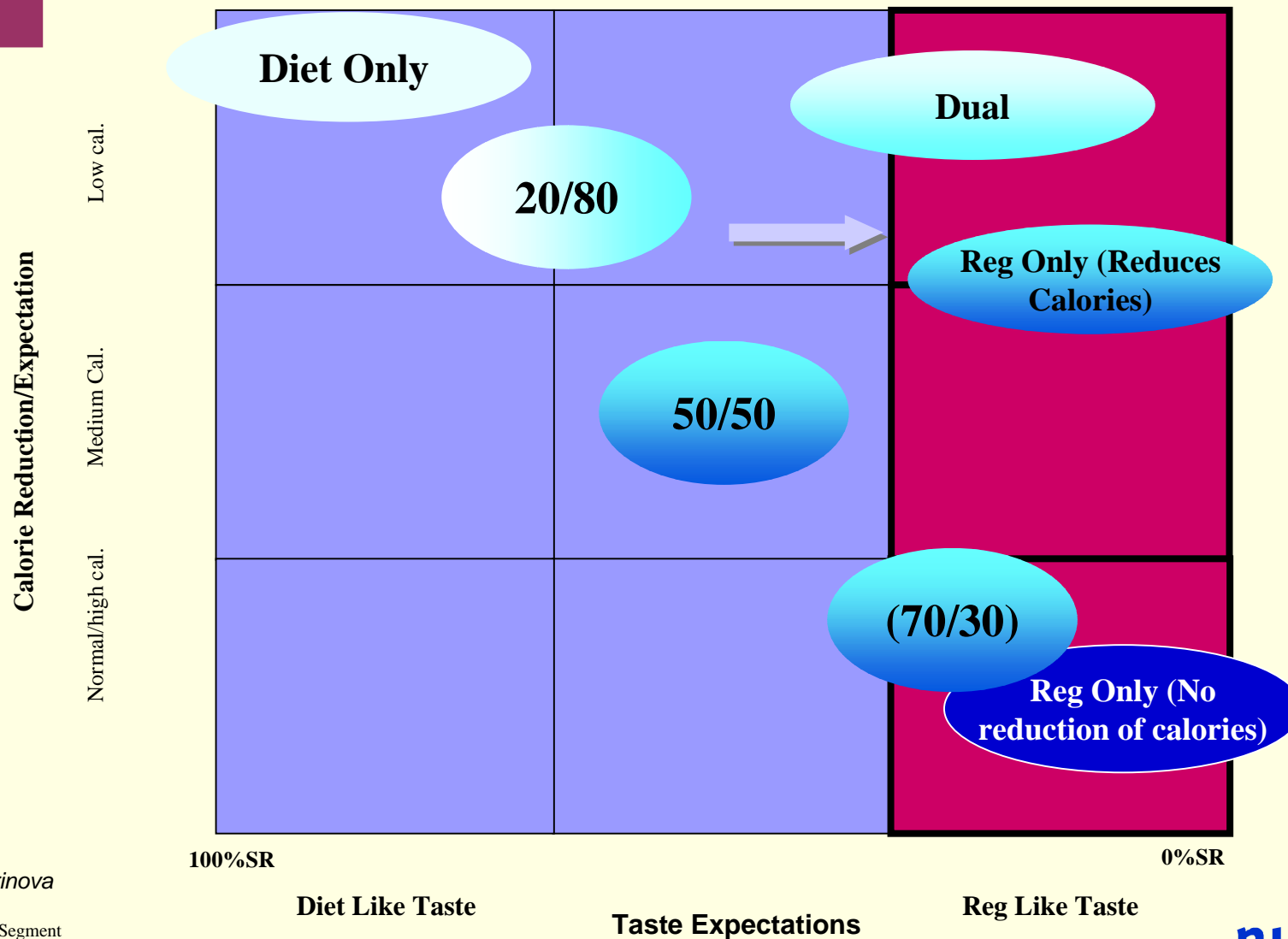


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## Calorie/Taste Matrix



Thank you!