

# Find out HOW YOUR CONSUMERS FEEL ABOUT SWEETENERS AND WHY THEY DO.

SWEETENER360 STUDY IDENTIFIES SIX CONSUMER SEGMENTS THAT ACCOUNT FOR \$54.8 BILLION IN TOTAL SALES IN 15 HIGH-VOLUME FOOD AND BEVERAGE CATEGORIES.



## ANSWERING MARKETERS' TOP QUESTIONS

- 1 To what degree are consumers concerned with sweeteners?
- 2 If not sweeteners, what are consumers concerned with?
- 3 What are the defining characteristics of consumers I should care about?
- 4 How much of my business do these consumers account for?

## MEET THE SIX SEGMENTS

**9% US HH**

**WALTER: NO HEALTH WORRIES**

Level of concern with sweeteners: 5 bars (4 full, 1 empty)

**In his own words**

“THE WAY I EAT TODAY IS NOT VERY HEALTHY, BUT IT MAKES ME HAPPY. AS LONG AS IT TASTES GOOD, [MY FAMILY WILL] EAT IT.”

**Top F&B influences:**

- Good taste: 71%
- Affordable: 56%
- Value: 52%

**Claims to avoid:**

- Salt/sodium: 32%
- Fast food: 29%
- Soda: 29%

**Contribution to sweetened product sales:\***

- HFCS: 12%
- Sugar: 7%
- No/low calorie: 10%

\* percentage of contribution to formulated products' total sales

**18% US HH**

**TERESA: MAKING ENDS MEET**

Level of concern with sweeteners: 5 bars (3 full, 2 empty)

**In her own words**

“I'M NOT WORRIED ABOUT HFCS. SUGAR IS SUGAR. I DON'T LIKE MY KIDS FEELING DEPRIVED. RIGHT NOW, IT'S ABOUT HOW FAR [MY FAMILY] CAN GO ON A LIMITED AMOUNT OF MONEY.”

**Top F&B influences:**

- Good taste: 56%
- Affordable: 49%
- Value: 46%

**Claims to avoid:**

- Fried food: 56%
- Sugar: 55%
- Fast food: 55%

**Contribution to sweetened product sales:\***

- HFCS: 18%
- Sugar: 19%
- No/low calorie: 20%

\* percentage of contribution to formulated products' total sales

**13% US HH**

**SANDRA: BUSY LIFE, TASTE OVER HEALTH**

Level of concern with sweeteners: 5 bars (3 full, 2 empty)

**In her own words**

“I DON'T NECESSARILY WANT TO EAT HEALTHY, BECAUSE I LIKE FOOD. WHEN YOU'RE NOT HOME AT NIGHT AND RUNNING KIDS TO ACTIVITIES, IT'S HARD AND MORE EXPENSIVE TO EAT HEALTHY.”

**Top F&B influences:**

- Good taste: 56%
- Affordable: 45%
- Value: 40%

**Claims to avoid:**

- Fast food: 43%
- Salt/sodium: 39%
- Fried food: 39%

**Contribution to sweetened product sales:\***

- HFCS: 17%
- Sugar: 13%
- No/low calorie: 14%

\* percentage of contribution to formulated products' total sales

**16% US HH**

**JOAN: DIABETICS & DIETERS**

Level of concern with sweeteners: 5 bars (1 full, 4 empty)

**In her own words**

“I BECAME VERY CONCERNED ABOUT [MY HEALTH ISSUES]. I'VE REALLY TRIED TO CHANGE MY DIET AND EAT HEALTHIER. I THINK ARTIFICIAL SWEETENERS ARE BETTER THAN SUGAR.”

**Top F&B influences:**

- Good taste: 44%
- Affordable: 41%
- Value: 36%

**Claims to avoid:**

- Sugar: 76%
- Fast food: 60%
- Fried food: 60%

**Contribution to sweetened product sales:\***

- HFCS: 13%
- Sugar: 15%
- No/low calorie: 20%

\* percentage of contribution to formulated products' total sales

**15% US HH**

**JULIA: HEALTHY BALANCE SEEKERS**

Level of concern with sweeteners: 5 bars (4 full, 1 empty)

**In her own words**

“I WANT TO KNOW WHAT'S GOING INTO MY BODY. I DON'T WANT TO BUY ANYTHING ARTIFICIAL OR PROCESSED. I TRY TO FIND A GOOD BALANCE BETWEEN [PRODUCTS] BEING HEALTHY AND REASONABLY PRICED.”

**Top F&B influences:**

- Good taste: 46%
- Affordable: 44%
- Value: 41%

**Claims to avoid:**

- HFCS: 85%
- Fast food: 56%
- Fried food: 55%

**Contribution to sweetened product sales:\***

- HFCS: 12%
- Sugar: 16%
- No/low calorie: 11%

\* percentage of contribution to formulated products' total sales

**17% US HH**

**STACEY: ALL NATURAL**

Level of concern with sweeteners: 5 bars (5 full)

**In her own words**

“IN COMPARISON TO AMERICA IN GENERAL, [MY FAMILY] ARE VERY HEALTHY EATERS. I SCOUR THE INTERNET FOR WAYS TO EAT HEALTHIER. COST DOESN'T MATTER. IF IT'S HEALTHY, WE HAVE TO BUY IT.”

**Top F&B influences:**

- Healthy: 73%
- Not overly processed: 70%
- Good taste: 65%

**Claims to avoid:**

- HFCS: 80%
- Fried food: 74%
- Fast food: 74%

**Contribution to sweetened product sales:\***

- HFCS: 14%
- Sugar: 19%
- No/low calorie: 13%

\* percentage of contribution to formulated products' total sales

## KEY TAKEAWAY

Consumer segments buy sweetened F&B products proportionately to their makeup of the general population. In fact, spending does not differ greatly across different lifestyles and sweetener types.

[Download new white paper](#) to learn what these segments mean to your brand.