



Good For All Sparkling Water

International Line Optimizer™





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Background & Objectives

Background & Objectives

After a few successful years of growth of their sparkling water line in the US, Good For All is looking to expand their sparkling water operations to Europe. Two key markets have been identified for 2018: UK and France.

To ensure that they are gaining traction for their products at launch, Good For All would like to run a Line Optimizer™ study to identify which flavors should be offered in each market to maximize reach.

Hypotheses / Assumptions

- At least 80% of each market will be reached with the flavors upon launch
- Ideally, at least two flavors will be consistent across both markets, but will offer unique flavors per market to meet market preferences if necessary

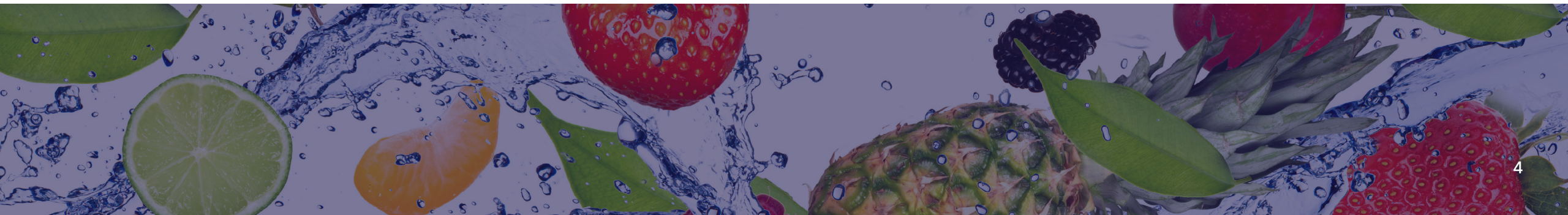
What combination of flavors will maximize reach for Good For All's new sparkling water line in UK and France?

Through tradeoff analysis, prioritize combinations of flavors based on purchase intent:

- Identify combinations that have at least 2 flavors that are consistent across markets to leverage operational efficiencies

Understand the relative strength of each flavor based on the following diagnostic measures:

- Frequency, Uniqueness, Familiarity



Stimuli Tested

Flavors Tested
Pure (Unflavored Seltzer)
Lime
Lemon Lime
Grapefruit
Black Cherry
Cherry Lime
Mixed Berry
Blackberry
Raspberry
Cranberry
Orange
Pear
Watermelon
Mango
Strawberry

Product Description

Good For All is a healthy food brand that offers an unsweetened, naturally flavored, zero-calorie sparkling water in a variety of flavors.





Methodology

Methodology

This study was conducted via an online quantitative survey. Each survey lasted approximately 10 minutes.

Method	# of Flavors Tested
TURF (Total Unduplicated Reach and Frequency)	16

Screening Question	Qualifying Criteria
Age	18-64
Gender	Males / Females
Region	Capture
Beverages Purchased in Past 3 Months	Flavored Sparkling Water
Beverages Consumed in the Past Month	Flavored Sparkling Water



Methodology: TURF

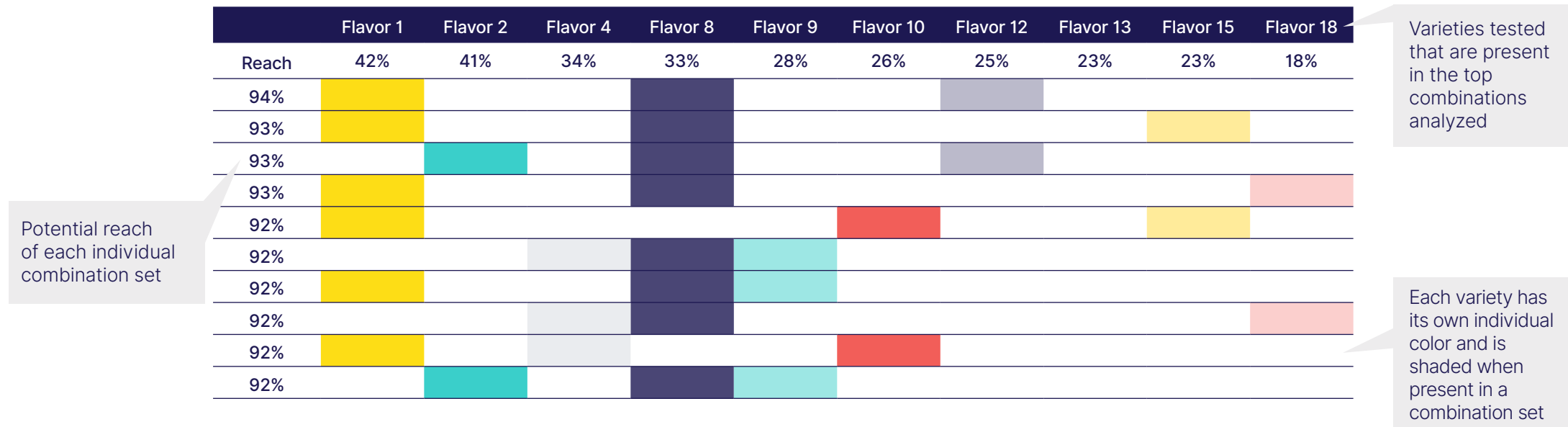
TURF analysis allows GutCheck to identify the set of varieties that will maximize reach of a product.

- TURF uses trade-off analysis data to create combinations and calculate the reach (i.e., the percentage of the audience that would be satisfied) with the varieties offered.
- An experimental design is created based on the number of varieties being tested.
- Using this data, the analysis creates a ranking of the varieties tested to show how the varieties compare to each other in terms of consumer preference.

Considering only these 3 flavors, which is the Most Appealing and which is the Least Appealing?

Most Appealing		Least Appealing
<input checked="" type="radio"/>	Vanilla	<input type="radio"/>
<input type="radio"/>	Chocolate	<input checked="" type="radio"/>
<input type="radio"/>	Strawberry	<input type="radio"/>

Combinations for maximum research: Used to determine what individual flavors and what combinations provide the greatest reach.



Methodology: Diagnostic Scorecard

GutCheck's Diagnostic Scorecard helps prioritize varieties in top combinations based on key metrics.

Concept Name	% Best Results	Fit with Brand	Uniqueness	Clarity
Concepts sorted in descending order of % Best scores		Top Box	Top Box	Top Box
Flavor 3	42%	51%	41%	50%
Flavor 1	41%	62%	51%	50%
Flavor 9	34%	62%	48%	47%
Flavor 8	33%	61%	46%	45%
Flavor 10	28%	44%	33%	39%
Flavor 2	26%	46%	49%	43%
Flavor 6	25%	43%	41%	43%
Flavor 7	18%	58%	41%	33%
Flavor 5	18%	51%	34%	42%
Flavor 4	18%	33%	35%	32%
Mean		50%	39%	40%

Varieties are sorted in number of % Best performance. % Best scores are calculated based on the number of times each variety was selected as "Best"

The mean score is calculated independently for each metric

The shaded cells indicated that the concept is considered to be an "outlier" - green means the concept performed above the average of the others, red means the concept performed below the average of the others

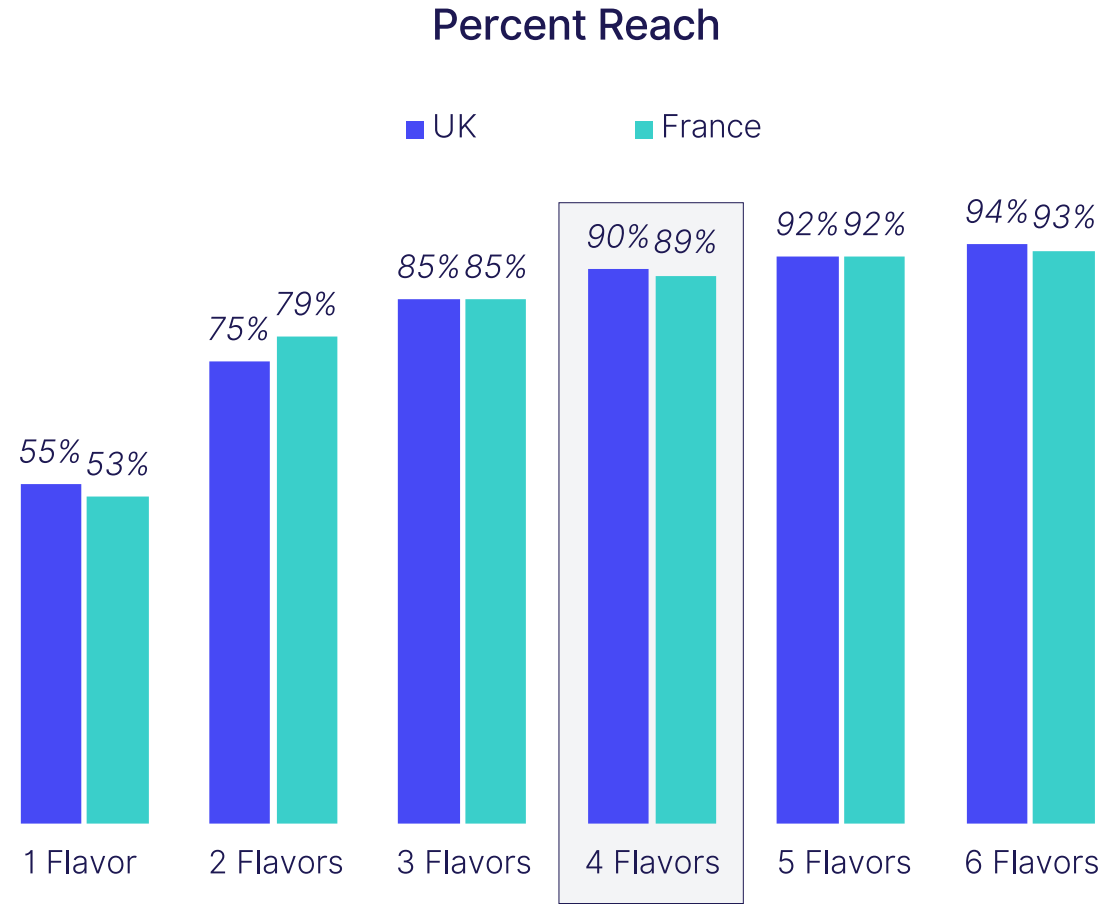


Executive Summary

Executive Summary (n=200)

Good For All can reach about 90% of both the France and UK market with 4 flavors.

- Going from 3 to 4 flavors in both countries increases reach by 5% in the UK and 4% in France. After 4 flavors, reach only increases incrementally.
- If Good For All is satisfied with 80% or higher reach, it could also move forward with 3 flavors in each country and reduce overall costs.



Top Combinations Of 4 Flavors

Good For All should offer the same set of 4-flavor combinations in the UK and France to maximize reach and operational efficiency.

Both markets share 5 combinations of flavors that enable Good For All to reach about 90% of each market and leverage operational efficiencies of producing the same flavors.

- The most preferred flavors from each individual market are in the top combinations (Strawberry for France; Lemon Lime for UK).
- Top combinations include at least one berry flavor in addition to lemon lime to maximize reach.
- Preferred flavors are typically familiar, as uniqueness is not an attribute desired in a flavor for sparkling water.
- If Good For All prefers to offer unique flavors in each market, the top unique flavors include Pear and Watermelon in the UK, and Cranberry and Orange in France.

UK Reach	France Reach	Lemon Lime	Strawberry	Raspberry	Mango	Black Cherry	Mixed Berry
90%	89%	Red	Yellow	Teal	Blue		
89%	88%	Red	Yellow	Teal	Blue	Dark Blue	
89%	88%	Red	Yellow			Dark Blue	Red
89%	88%	Red	Yellow				Red
89%	88%	Red		Teal	Blue	Dark Blue	



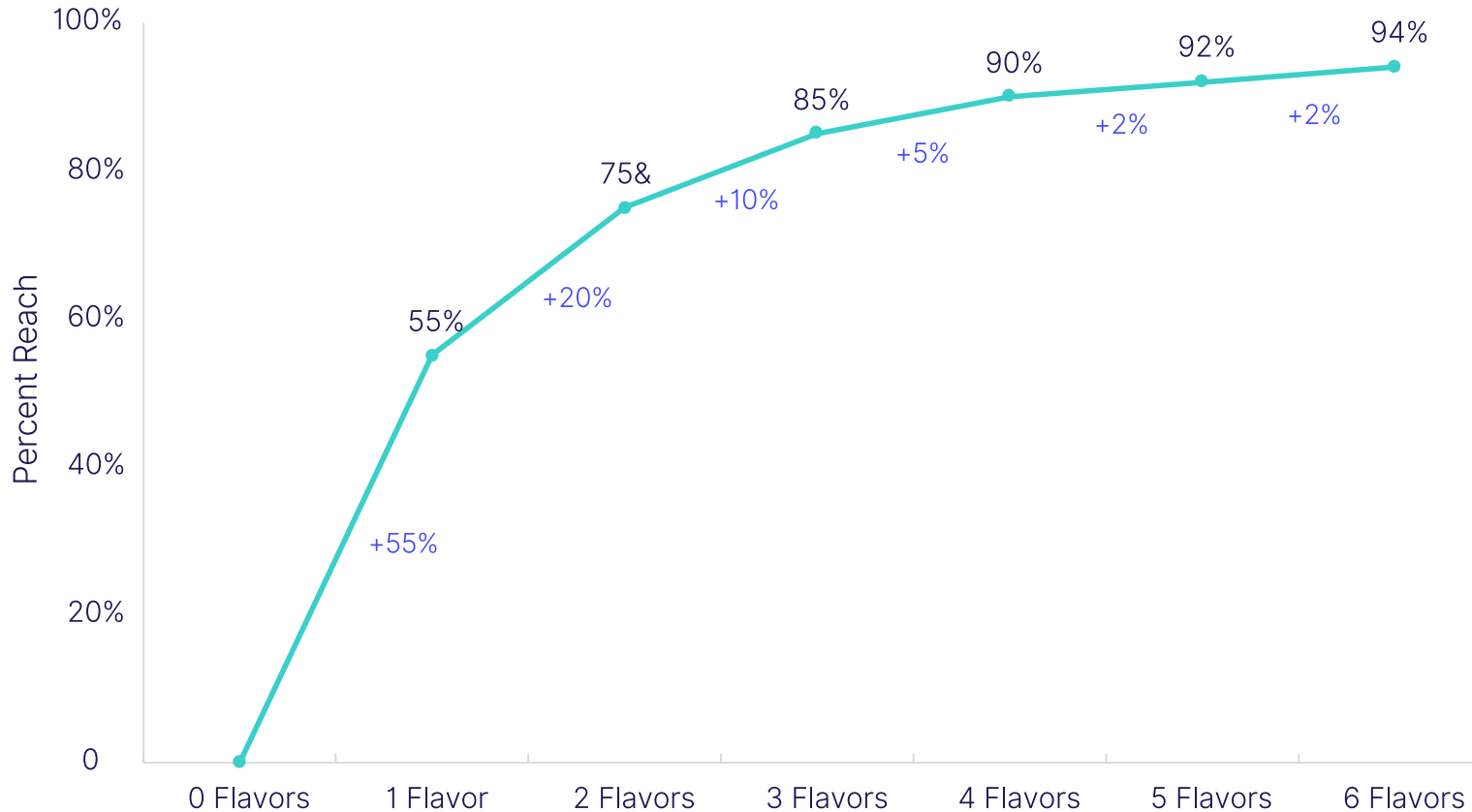
Detailed Findings

United Kingdom



Potential Reach (n=200)

In the UK, Good For All can achieve up to 90% reach with 4 flavors in its new flavored sparkling water line.



Note: This chart represents the top combination with the highest unduplicated reach.



Top Combinations Of 4 Flavors

Top combinations of 4 flavors tend to include Strawberry and Lemon Lime, in addition to one other berry or citrus flavor.

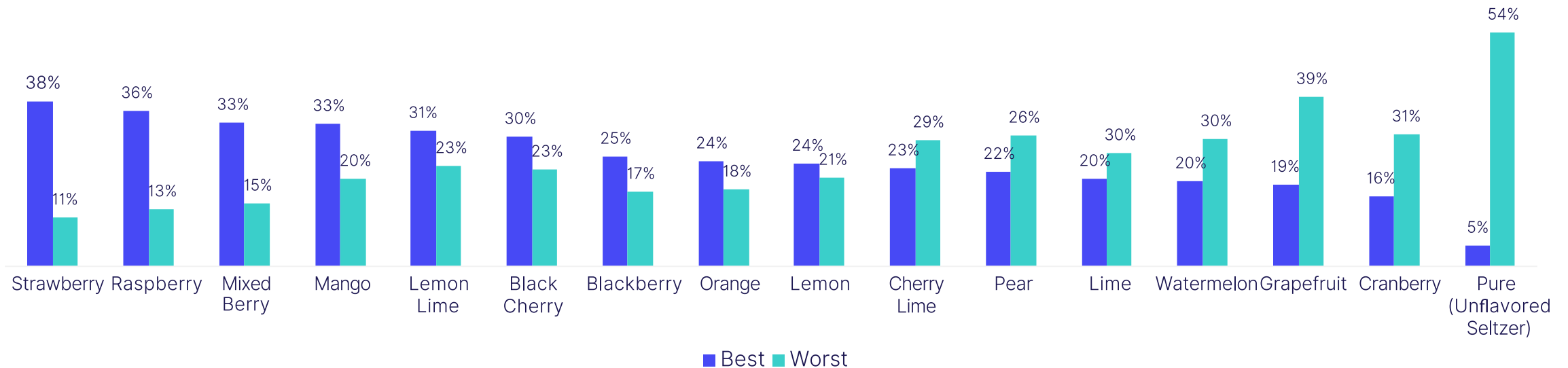
Reach	Strawberry	Raspberry	Mixed Berry	Mango	Lemon Lime	Black Cherry	Blackberry	Lemon	Pear	Grapefruit
90%	Red	Yellow		Blue	Dark Blue					
89%	Red	Yellow			Dark Blue	Red				
89%	Red		Teal		Dark Blue	Red				
89%	Red			Blue	Dark Blue	Red				
89%	Red		Teal	Blue	Dark Blue					
89%	Red			Blue	Dark Blue		Yellow			
89%	Red				Dark Blue	Red			Blue	
89%		Yellow		Blue	Dark Blue	Red				
88%	Red			Blue		Red		Teal		
88%		Yellow			Dark Blue	Red			Blue	
88%	Red				Dark Blue	Red	Yellow			
88%	Red	Yellow		Blue				Teal		
88%	Red				Dark Blue	Red				Dark Blue
88%	Red	Yellow			Dark Blue				Blue	
88%	Red			Blue					Blue	

Note: Only varieties included in the top 15 combinations are shown in the table.
All n=200 respondents saw each flavor 3 times in the trade-off exercise, so percentages are based on n=600 views per flavor.



Mass Grocery Top 15 Combinations: Overall

Flavored sparkling water purchasers in the UK have a strong preference for berry flavors (excluding Cranberry); whereas citrus flavors are more polarizing.



For each variety, a “best” and “worst” percentage are calculated by dividing the number of times a variety was selected as best and worst, respectively, by the number of times the variety was shown. All n=200 respondents saw each flavor 3 times in the trade-off exercise, so percentages are based on n=600 views per flavor.
Q: Considering only the flavors below, which would you be most likely to purchase, and which would you be least likely to purchase?



Flavor Vs. Mean Diagnostic Scorecard (n=100 per flavor), Top Box

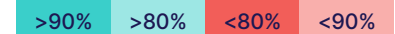
Flavors that are less unique and more familiar to consumers are preferred.

Concept Name		Frequency	Uniqueness	Familiarity
Flavors sorted in descending order of % Best		1x/week or more often	TB	TB
Strawberry	38%	32%	15%	40%
Raspberry	36%	21%	18%	36%
Mixed Berry	33%	30%	22%	26%
Mango	33%	32%	28%	20%
Lemon Lime	31%	27%	21%	41%
Black Cherry	30%	14%	29%	12%
Blackberry	26%	19%	26%	19%
Orange	24%	28%	19%	33%
Lemon	24%	22%	13%	35%
Cherry Lime	23%	11%	34%	7%
Pear	22%	11%	26%	15%
Lime	20%	18%	12%	34%
Watermelon	20%	14%	37%	16%
Grapefruit	19%	16%	32%	17%
Cranberry	16%	12%	18%	23%
Pure (Unflavored Seltzer)	5%	17%	16%	33%
Mean	-	20%	25%	25%

GutCheck Flavor vs. Mean Scorecard Comparison

Statistical significance is determined by a 2-tailed test and sample size of N=100 per flavor.

Shading Legend: Significance compared to the mean





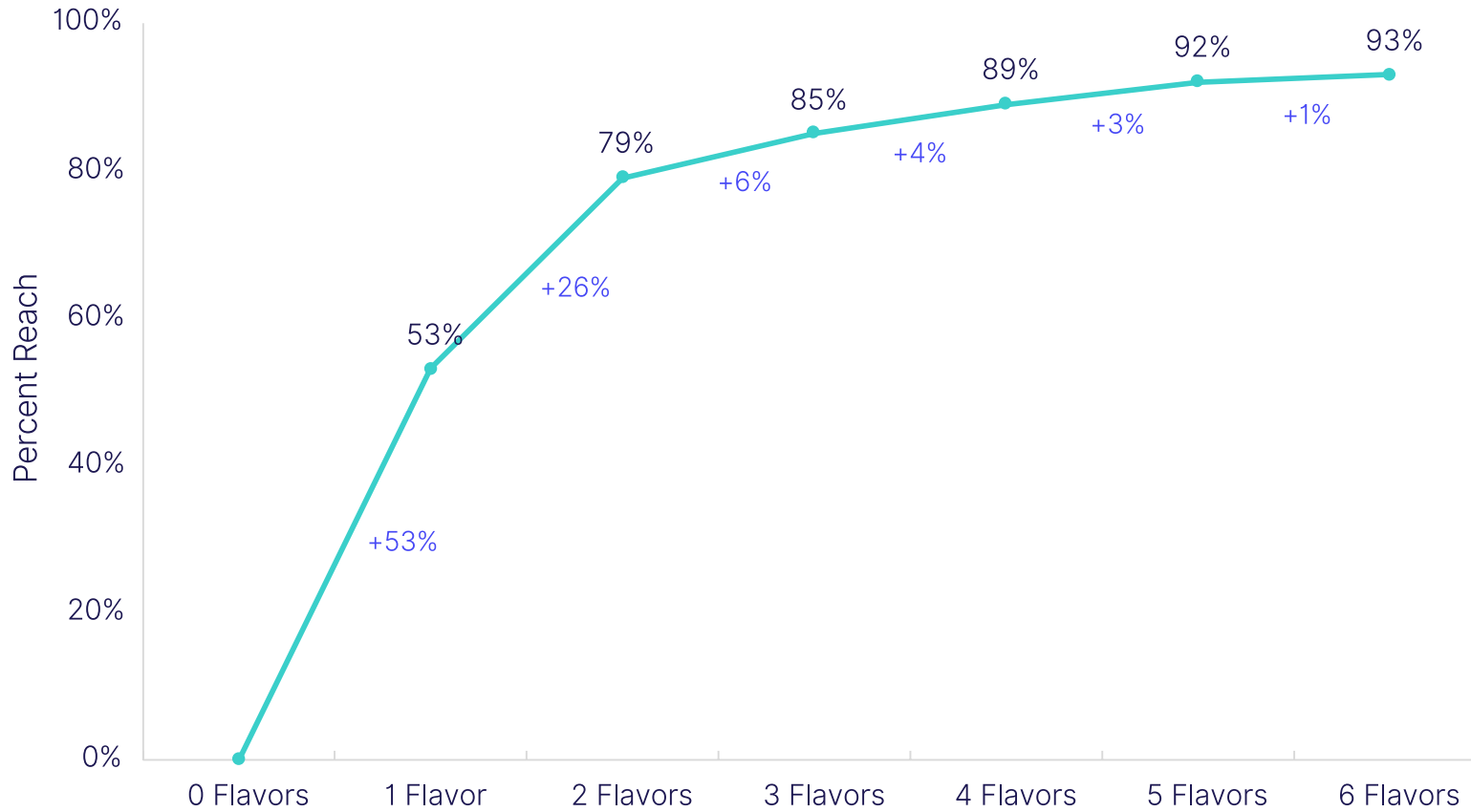
Detailed Findings

France



Potential Reach (n=200)

In France, Good For All can achieve up to 89% reach with 4 flavors in its new flavored sparkling water line.



Note: This chart represents the top combination with the highest unduplicated reach.



Top Combinations Of 4 Flavors

Lemon Lime is included in all of the top flavor combinations, in addition to at least one berry flavor.

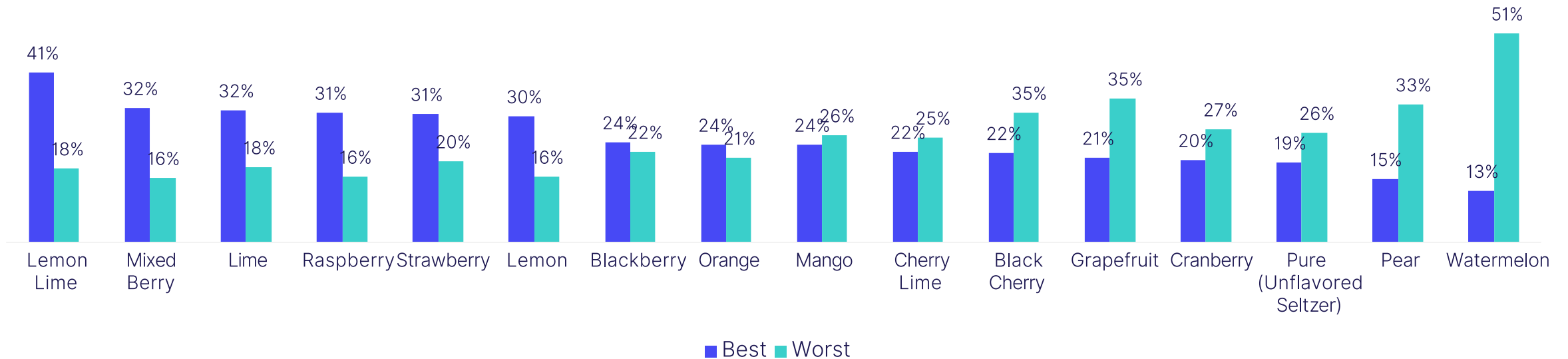
Reach	Lemon Lime	Mixed Berry	Raspberry	Strawberry	Orange	Mango	Black Cherry	Cranberry
89%	█		█	█				█
89%	█		█	█		█		
89%	█		█		█			█
89%	█	█	█			█		
89%	█		█		█	█		
89%	█		█			█		█
89%	█	█	█		█			
88%	█		█	█			█	
88%	█	█		█		█		
88%	█		█		█		█	
88%	█		█	█				
88%	█	█			█	█		
88%	█		█			█	█	
88%	█	█			█		█	
88%	█		█			█	█	
88%	█	█		█			█	

Note: Only varieties included in the top 15 combinations are shown in the table.
All n=200 respondents saw each flavor 3 times in the trade-off exercise, so percentages are based on n=600 views per flavor.



Best / Worst Results, Percent Rate Most Likely And Least Likely To Purchase

Consumers clearly prefer Lemon Lime and berry flavors; however they dislike some similar flavor profiles such as Black Cherry, Grapefruit, and Cranberry.



For each variety, a “best” and “worst” percentage are calculated by dividing the number of times a variety was selected as best and worst, respectively, by the number of times the variety was shown. All n=200 respondents saw each flavor 3 times in the trade-off exercise, so percentages are based on n=600 views per flavor.

Q: Considering only the flavors below, which would you be most likely to purchase, and which would you be least likely to purchase?

Flavor Vs. Mean Diagnostic Scorecard (n=100 per flavor), Top Box



The top combinations include flavors consumers are most familiar with, such as Strawberry; unique flavors, like Watermelon, are less favorable.

Concept Name		Frequency	Uniqueness	Familiarity
Flavors sorted in descending order of % Best		1x/week or more often	TB	TB
Lemon Lime	41%	28%	26%	40%
Mixed Berry	32%	23%	19%	24%
Lime	32%	29%	23%	32%
Raspberry	31%	27%	18%	25%
Strawberry	31%	24%	17%	41%
Lemon	30%	29%	21%	50%
Blackberry	24%	11%	30%	15%
Orange	24%	28%	21%	45%
Mango	24%	19%	38%	16%
Cherry Lime	22%	16%	37%	11%
Black Cherry	22%	12%	50%	11%
Grapefruit	21%	23%	22%	28%
Cranberry	20%	12%	26%	16%
Pure (Unflavored Selzter)	19%	39%	11%	55%
Pear	15%	15%	26%	15%
Watermelon	13%	10%	39%	11%
Mean	-	22%	27%	27%

GutCheck Flavor vs. Mean Scorecard Comparison

Statistical significance is determined by a 2-tailed test and sample size of N=100 per flavor.

Shading Legend: Significance compared to the mean





Appendix

Appendix: Sample Demographics

Gender	UK	France
Male	47%	46%
Female	59%	54%

Age	UK	France
18-34	10%	12%
25-34	30%	21%
35-44	29%	32%
45-50	12%	13%
51-64	20%	24%

Beverages Purchased P3M	UK	France
Flavored Sparkling Water	100%	100%
Coffee/Tea	93%	96%
Sports and Energy Drinks	68%	54%
Non-Carbonated Water (flavored and unflavored)	77%	90%
Fruit Juice	92%	96%
Milk	95%	95%
Carbonated Soda	82%	90%
Unflavored Sparkling Water	65%	88%

Beverages Consumed P3M	UK	France
Flavored Sparkling Water	100%	100%
Coffee/Tea	93%	94%
Sports and Energy Drinks	62%	51%
Non-Carbonated Water (flavored and unflavored)	71%	90%
Fruit Juice	89%	97%
Milk	92%	87%
Carbonated Soda	80%	86%
Unflavored Sparkling Water	68%	87%