



YALE RUDD CENTER
FOR FOOD POLICY & OBESITY

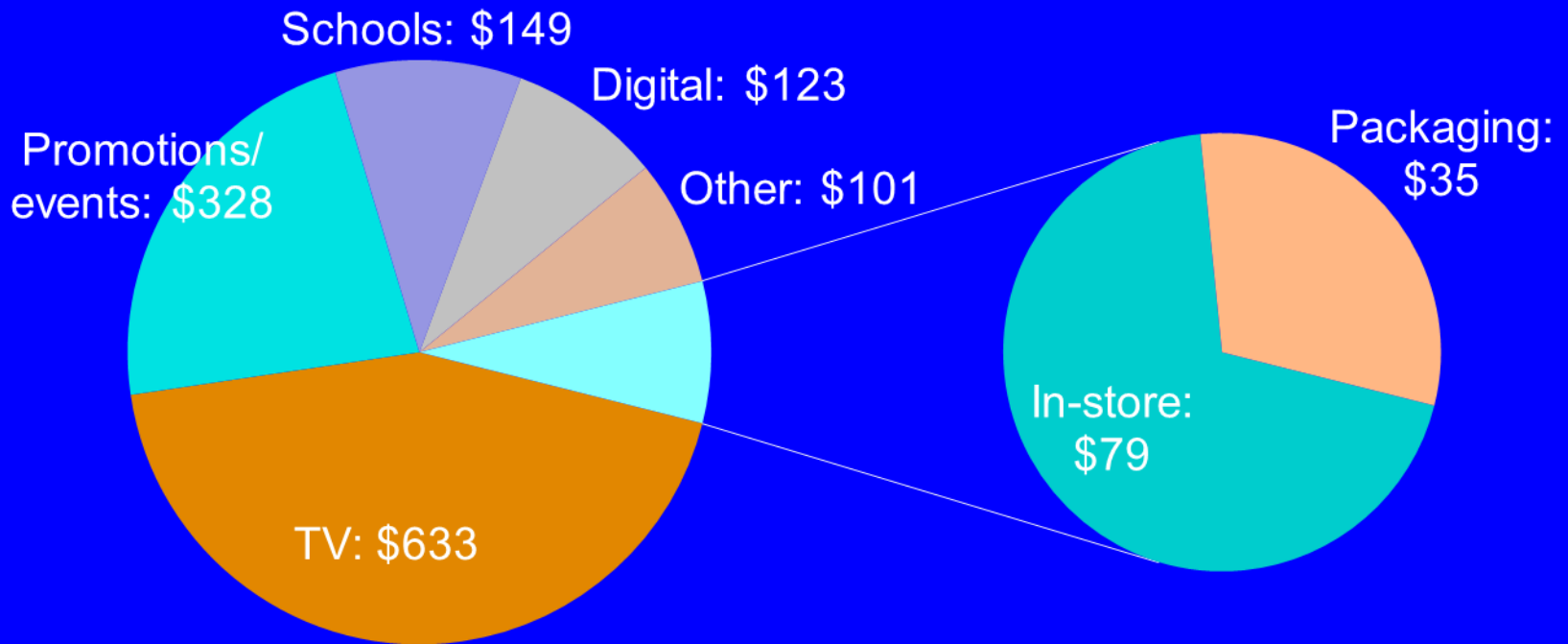
Helping parents raise healthy kids: The future of in-store marketing?

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Youth-targeted marketing expenditures

2009: \$1.8 billion total



Source: FTC 2012 *Excludes cost of kids' meal toys

Expenditures by product

- \$945 million in total retail-based marketing

	In-store	Packaging/ labeling
Carbonated beverages	\$167.4 mill	\$16.2 mill
Snack foods	\$131.2 mill	\$30.3 mill
Candy/frozen desserts	\$116.3 mill	\$17.6 mill
Restaurants	\$96.1 mill	\$26.9 mill
Juice/non-carbonated beverages	\$85.4 mill	\$27.3 mill
Breakfast cereal	\$73.4 mill	\$8.7 mill

Source: FTC 2012

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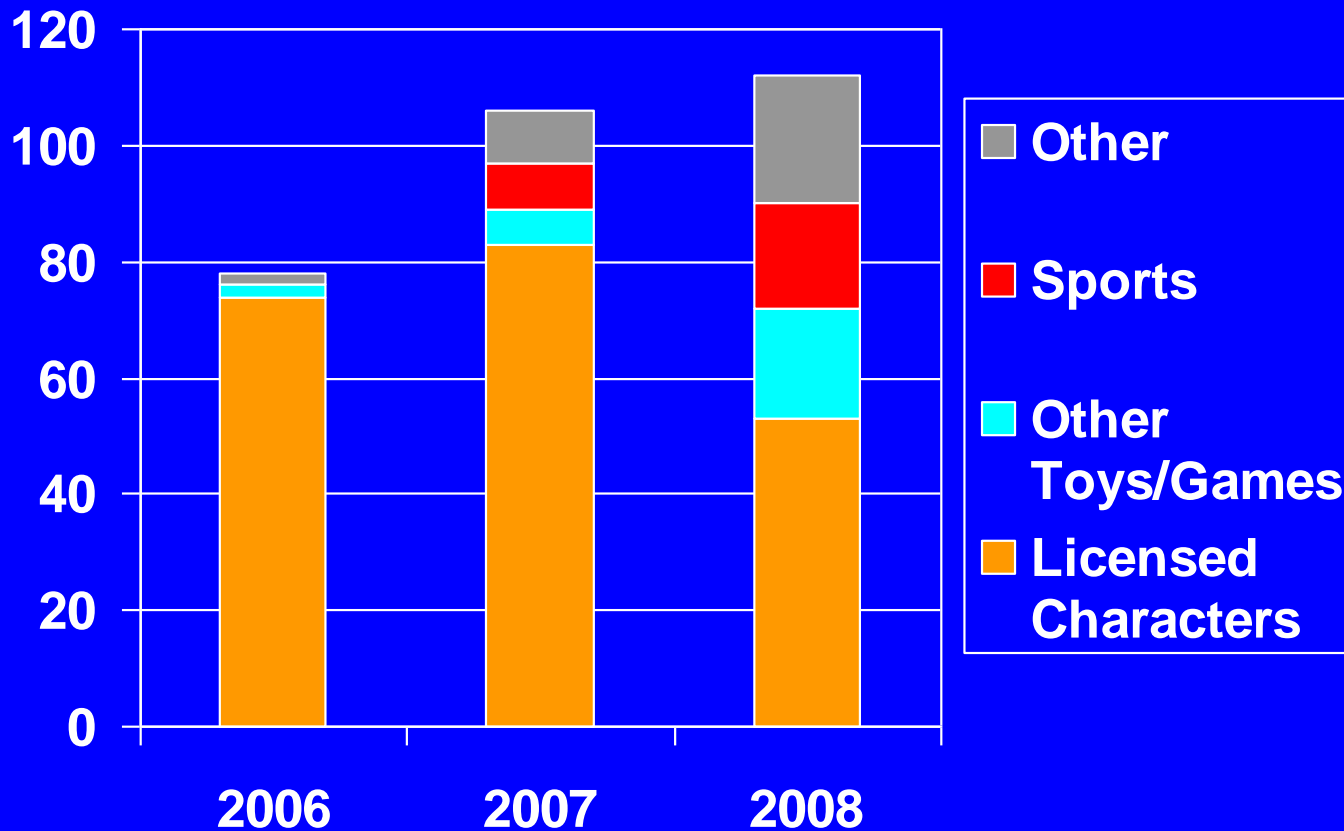
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Fruits and vegetables	\$9.8 mill	\$7.4 mill

Source: FTC 2012

Retail-based marketing

- Packaging
- Shelf placement
- Special displays
- Price promotions

Youth-oriented cross-promotions



Source: Harris, Schwartz & Brownell, 2009

Effects of licensed characters



	Character tastes better	Tastes the same	Plain tastes better	Signif.
Graham crackers	55%	37.5%	7.5%	<.001
Fruit snacks	52.5%	37.5%	10%	<.001
Baby carrots	50%	25%	25%	.07

Source: Roberto, Baik, Harris, & Brownell, 2010

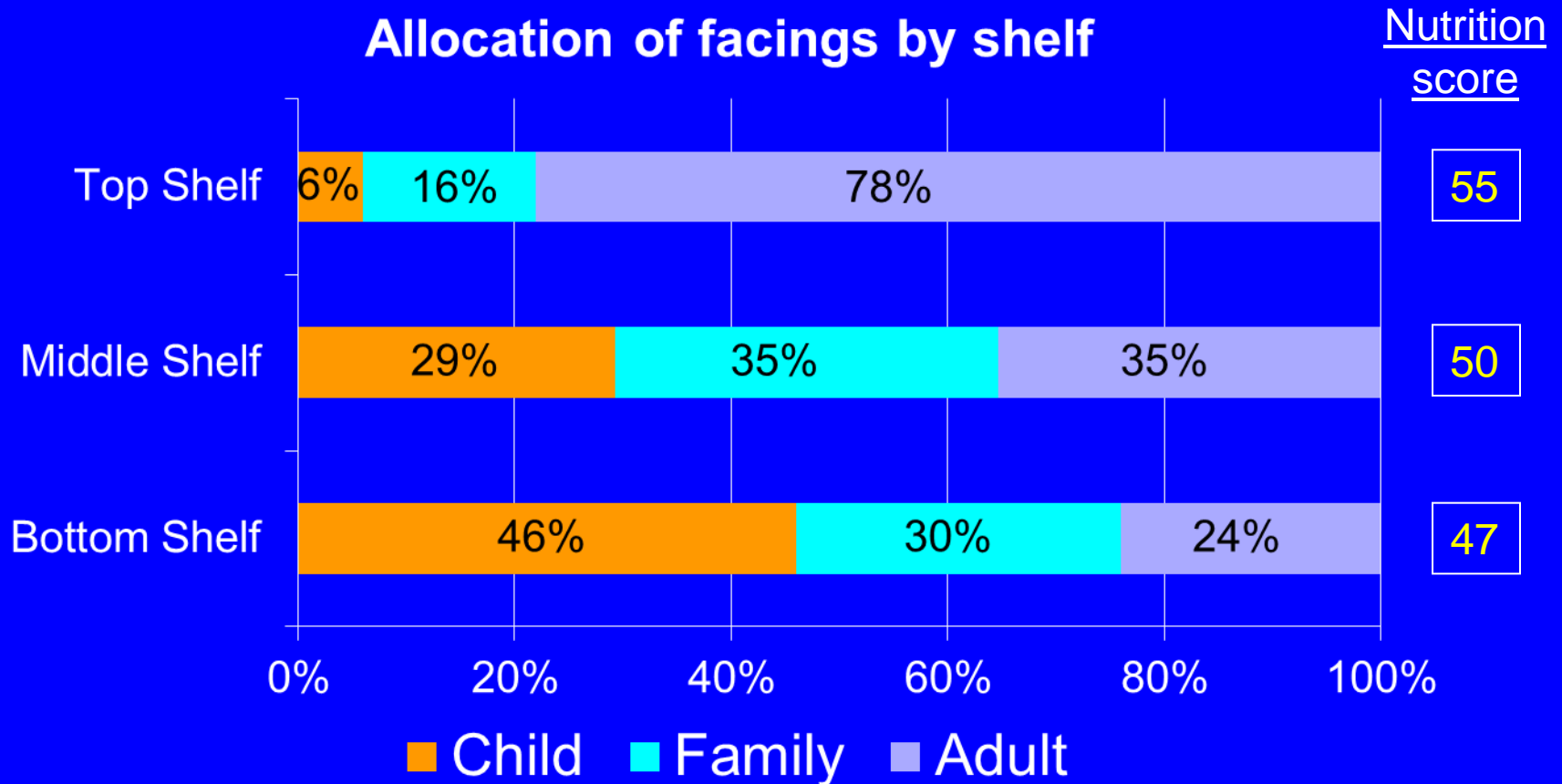
Shelf placement



Prime shelf locations



Shelf composition

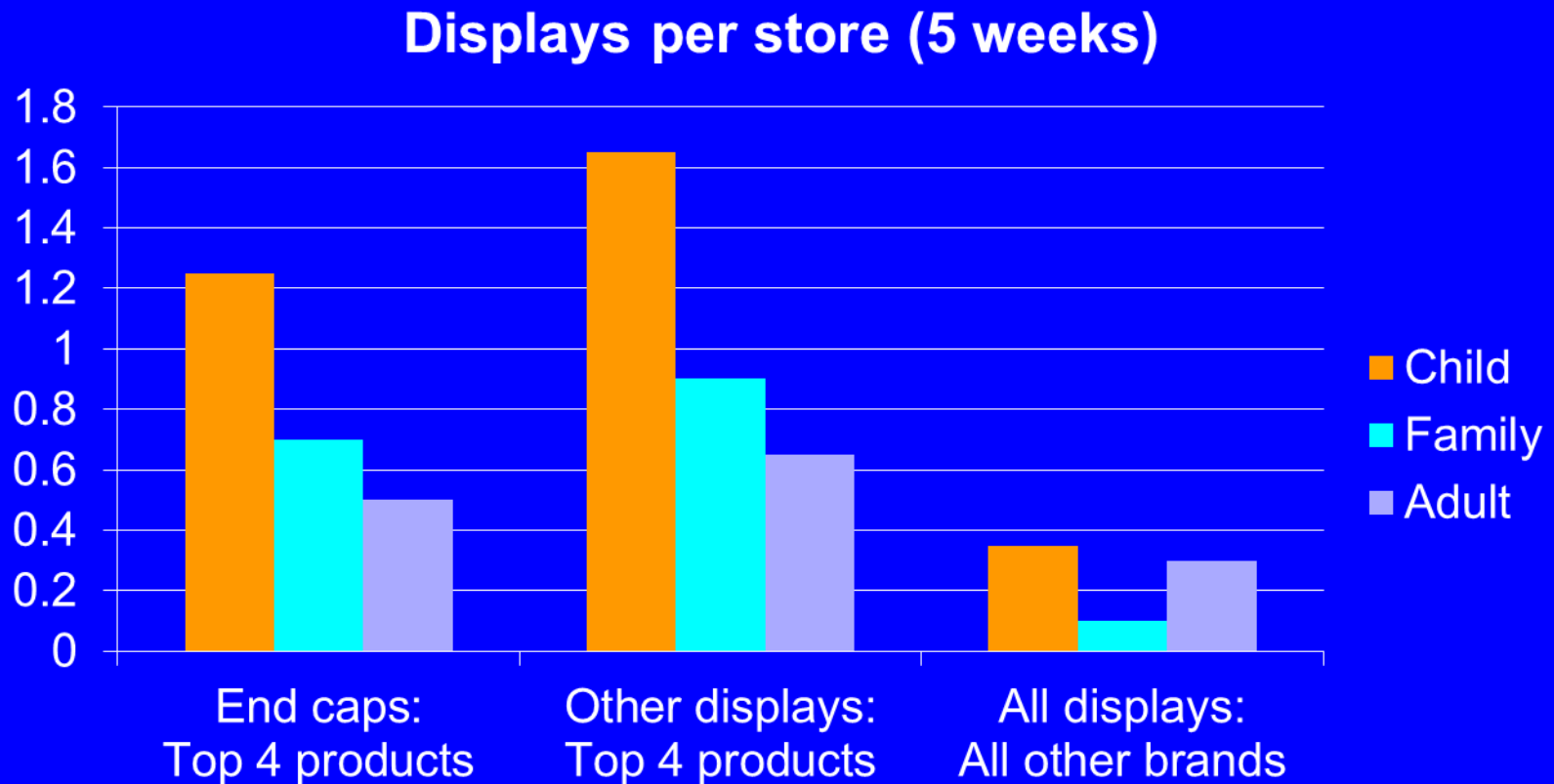


Source: Cereal Facts, 2009

Special displays



Special displays: cereals



Source: Cereal Facts, 2009

Pricing

- Store brands
 - 18% of cereal shelf space
 - 12% of sales (Mintel, 2009)
- Price promotions
 - Price signs, shelf danglers, coupons



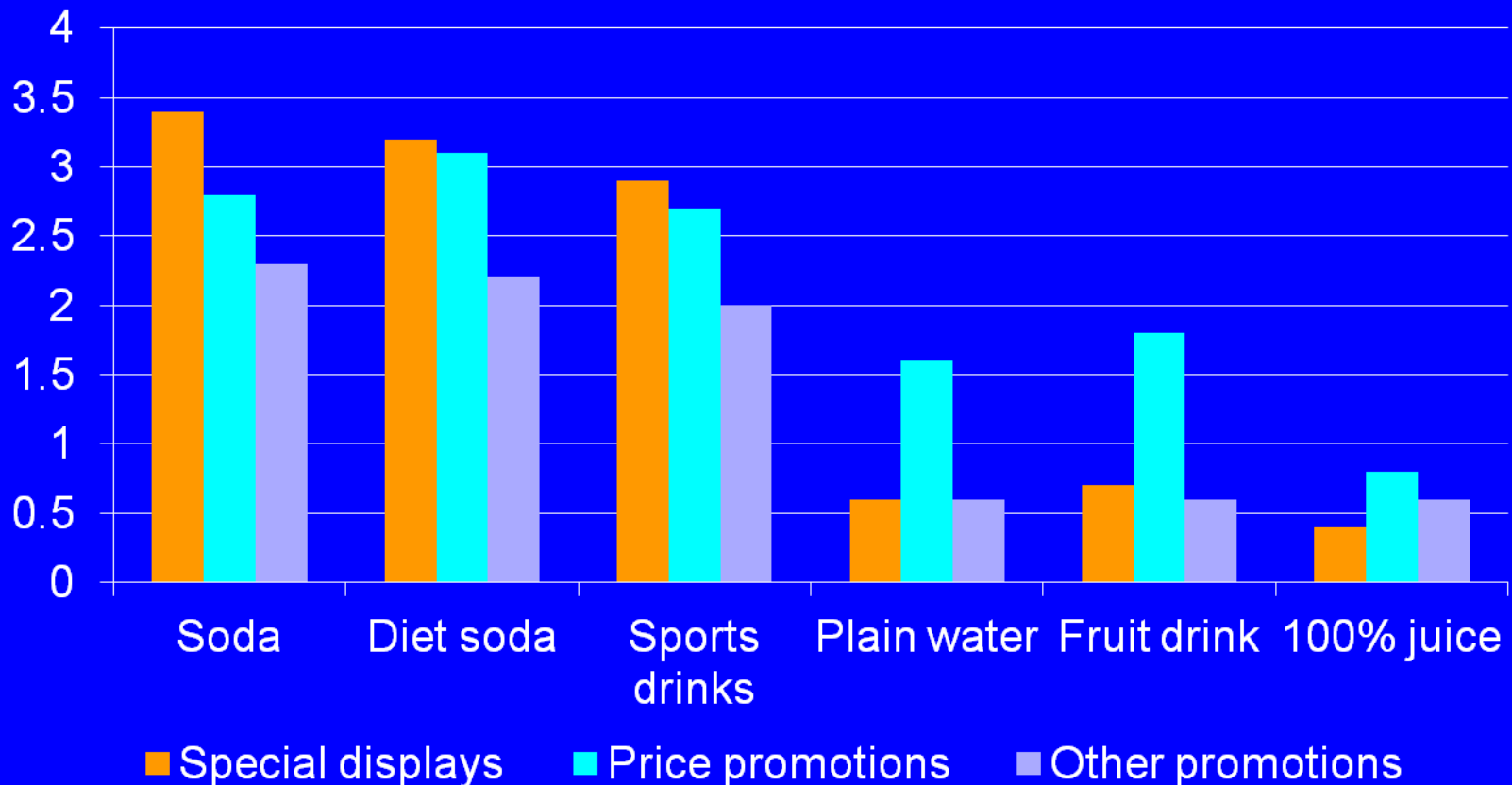
Price promotions: cereals



Source: Cereal Facts, 2009

Sugary drink promotions

Promotions per product (4 weeks)



Source: Unpublished data, Rudd Center, 2012

Incremental sales

Percent of
total sales:

34%

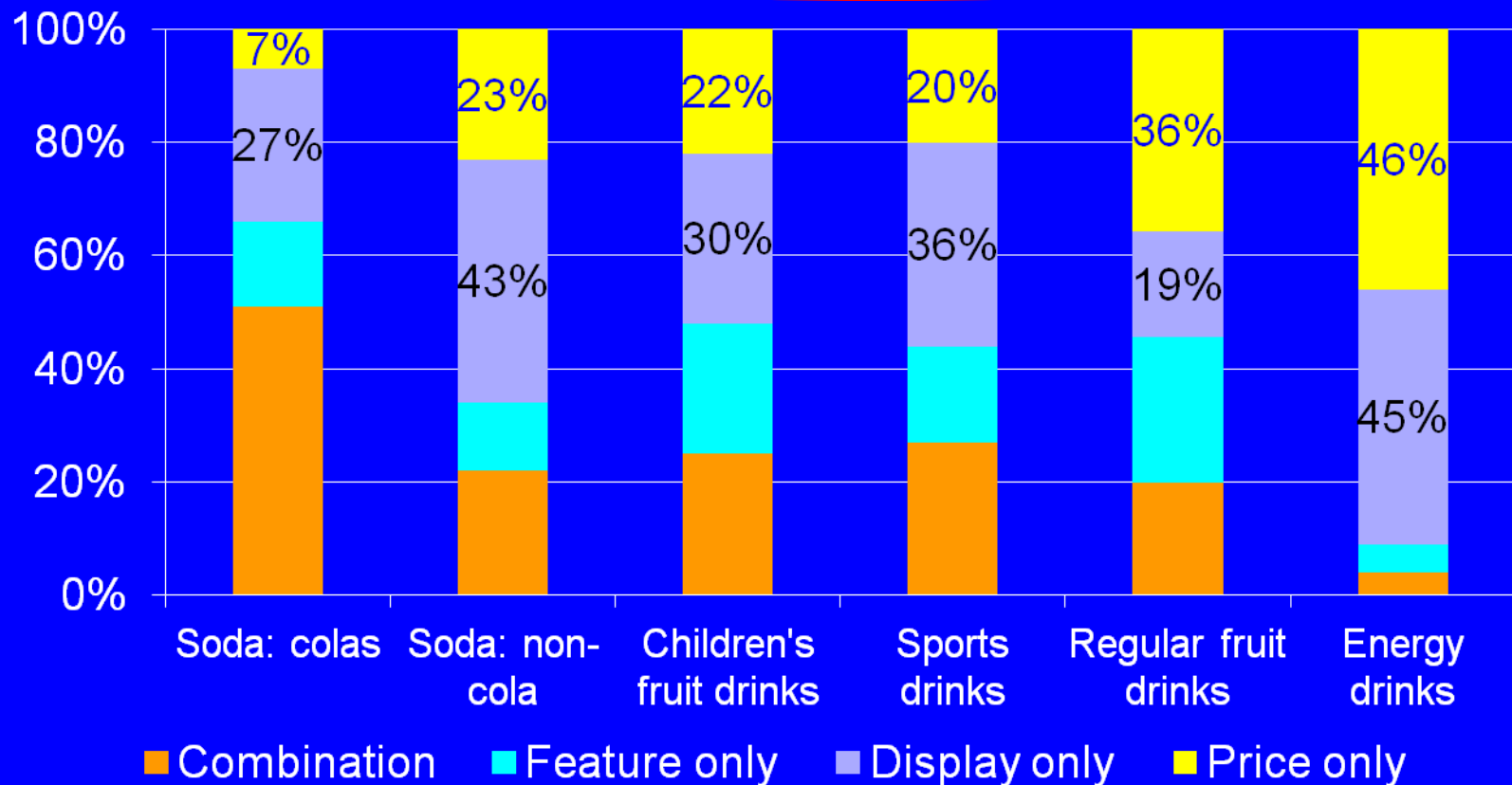
23%

23%

22%

17%

9%



Source: Sugary Drink FACTS, Analysis of Symphony IRI data, 2011

The healthy supermarket

- Set nutrition standards for products marketed directly to children in stores
 - Product packaging and special displays
 - Licensed characters and promotions
- Increase prominence of more nutritious products
 - “Family-friendly” aisles
 - Prime shelf placement
 - Separate foods by nutrition quality

The healthy supermarket

- Increase promotion of nutritious products
 - Special displays and price promotions
 - Other incentives and promotions
 - Products from smaller, specialty companies
- Develop more nutritious store brands

Helping parents raise healthy kids?



Thank you!

My colleagues at the Rudd Center

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YaleRuddCenter.org

Spotlight on company practices

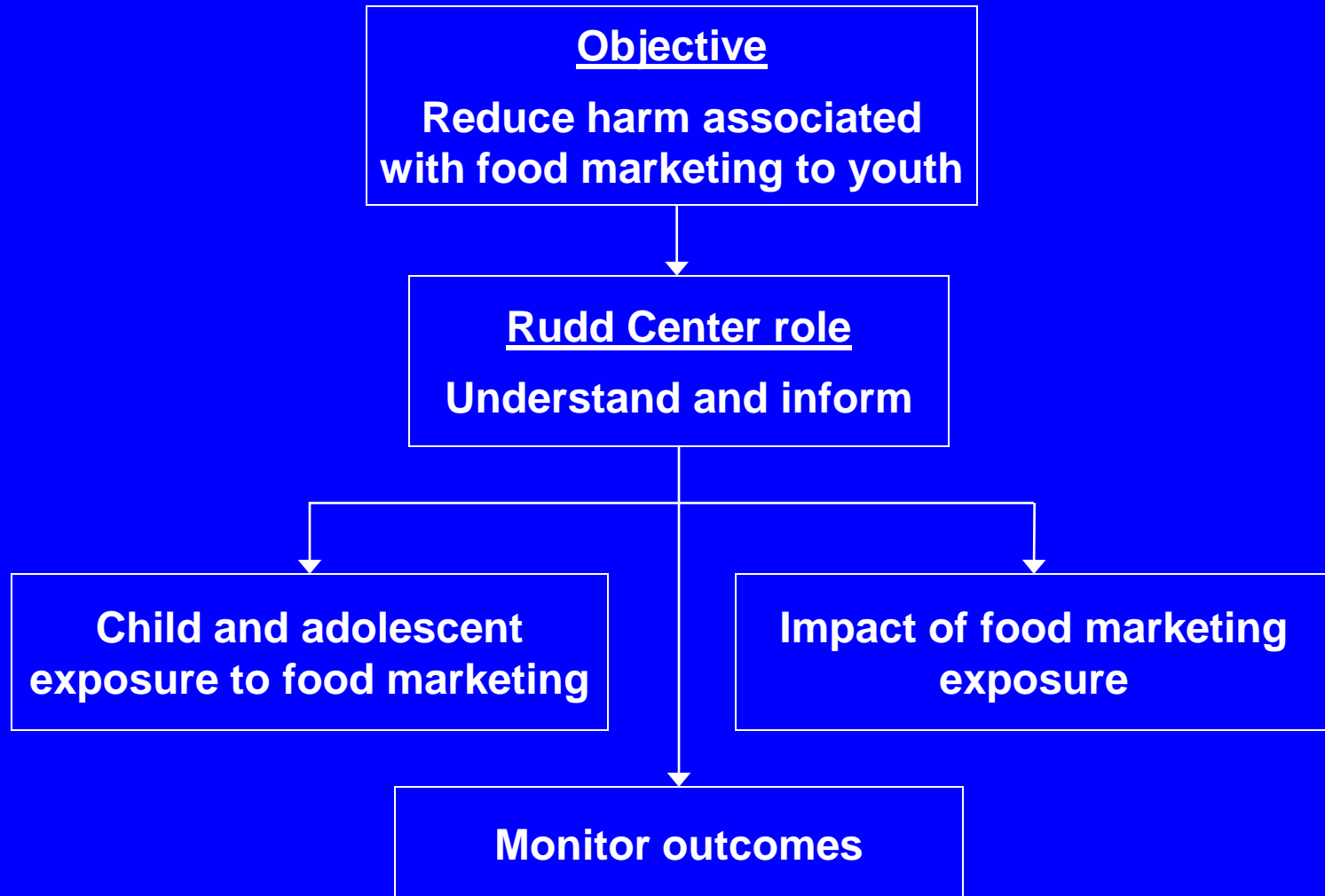


CerealFacts.org



SugaryDrinkFacts.org

Rudd Center food marketing research



Strategy for change

