An Adaptation of Kraft Singles

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Executive Summary

In the cheese industry, Kraft has been a frontrunner since they were founded in 1903, widely known for their Kraft Singles. In recent years, sales of Kraft Singles, a processed cheese product, have fallen, and the sales of more natural cheeses from private label brands, such as Private Selection, have risen.

The objective of this research is to determine the reason that Kraft Singles are losing sales while natural cheeses are gaining sales. Once the main cause of this shift in sales is identified, the goal is to create a solution for Kraft through data-driven results gathered from both primary and secondary research. The results produced by graphs, perceptual maps, and t-tests showed that our hypotheses were accepted.

From these results, it can be concluded that Kraft can increase sales of their Kraft Singles by altering their ingredients from preservatives and emulsifiers to more natural ingredients, so that instead of being considered a "pasteurized prepared cheese product", they can be considered a real cheese. Kraft Singles contain less than 51% real cheese, so according to the U.S. Food and Drug Administration, they cannot be called a cheese. Because of a consumer preference shift towards healthier products, having more natural ingredients is crucial for Kraft Singles in order to compete with private labels that already offer such cheeses.

Our recommendation is for Kraft to change the ingredients of their Kraft Singles to be more than 52% real cheese and to advertise it as a real cheese. The total cost of this product change and advertising will be $337.3 million, and the return on investment will be 2.46%.

I. Kraft Singles: Industry, Market, and Buyer

A. Industry Analysis

The cheese industry is one that is heavily penetrated by companies, regions and a diversity of offerings. Cheese was first conceived in 8000 BC stemming from when sheep became domesticated. Cheese has been a common good for 10,000 years and a commercial good on a wide-scale production level for over 200 years, as the first cheese factory sprung up in the early 1800s.

The cheese industry today is much different than what it was in the 1800s. Today in the global marketplace there are hundreds of cheese manufacturers, even more sellers, and billions of buyers. The company of Kraft was started in 1903 by J.L Kraft with the help of two other successful entrepreneurs: C.W. Post, who founded General Foods Corporation, and Oscar Mayer who began and their first product was cheese.

1. Competitive Analysis

Kraft has both direct and indirect competitors. The qualifications of their direct and indirect competitors are ones that are substantial in cheese revenues, awareness of their public brand image, percentage of market share, and a brief overview of the lines of cheese from Kraft's competitors.

The direct competitors of Kraft Singles by the qualification of significant revenue streams from processed cheese include Borden, Land O'Lakes, Crystal Farms, Boars Head, and Daiya. These revenue numbers are coming from the sales of processed cheese, not cheese as a whole, considering Kraft Singles are considered an imitation cheese because of processing. First looking at Borden, according to Statista in 2019 Borden brought in $12.97 million, Land O'Lakes

brought in $5.06 million, Crystal farms brought in $3.92 million, Boar's Head accumulated $3.77 million, and lastly, Daiya made $3.29 million. For Kraft Singles alone, they brought in $161.13 million in sales.

The competitors that are threatening Kraft Singles the most today are those making a variety of natural cheeses with unprocessed ingredients. These are heavily made up of private label brands, some of the largest being Kroger's Private Selection brand and Walmart's Great Value brand. According to Statista, in 2019 private label cheese brands brought in $659.73 million of revenue from the sale of natural cheeses, while Kraft only brought in $181.97 million. Some of Kraft's top competitors of processed cheese mentioned previously, such as Borden and Crystal Farms, are also top competitors in the natural cheese category, along with Sargento and Tillamook. In recent years there has been a change in the market for cheese, as many consumers are becoming more health-conscious and are opting for real cheeses over processed cheeses like Kraft Singles. As Kraft Singles are Kraft's top cheese product, and Kraft doesn't have a variety of more natural cheese options, those that do offer these more health-friendly cheeses that consumers are moving towards will gain sales, while the sales of Kraft Singles will continue to fall.

Next, it is important to consider the percentage of market share for the top five competitors Kraft faces specifically from a processed cheese perspective. Private label cheeses as a whole have 24.87% of market share, Borden has 3.76%, Land O'Lakes has 1.47%, Crystal Farms has 1.09%, Boar's Head has 0.95%, and lastly Daiya has 0.62% of market share. Kraft Singles alone have 46.69% of the market share in the processed cheese category. Kraft falls behind when it comes to the market share for the natural cheese competitors that they face. In

this category, private label brands have 67.40% of the market share, Kraft has 18.59%, Sargento has 5.78%, Crystal Farms has 2.25%, and lastly, Borden has 1.47% of market share for the organic cheese market within the cheese industry as a whole. Here, private labels have an advantage over Kraft by an overwhelming margin.

Considering the lines of products, there are some conclusions that are helpful based on each competitor. Crystal Farms and Land O'Lakes have the most diverse options from among the five competitors. Boar's Head has the most unique cheese and flavoring options. Borden has the most simplified way of choosing their cheeses, which is a huge positive for anyone who is looking for diversity. Lastly, Daiya stands out among these competitors when it comes to ingredients; they are mainly made out of cassava and arrowroot, which gives consumers an alternative form of cheese to choose from that does not contain dairy.

2. Driving Forces

With a clear picture of what the competitive situation looks like in the market for cheese, it is important to look at the driving forces. Each industry is different depending on macro factors, and no single factor controls the industry, but rather the accumulation of these main factors coming together determines the nature of the industry. For the cheese market as a whole, there are four driving forces which are globalization, technological advancement, societal trends, and environmental issues.

Globalization in the cheese market has a few aspects: the exportation of cheese, foreign countries rising in their production of cheese, increase in demand worldwide, the diversification of production, and the fight to have the lowest price worldwide. There has been an increase in the exportation of cheese steadily over the past ten years according to the US Dairy Export

Council. This fact plays hand in hand with the diversification of the production of cheese. In countries like Russia, Brazil, and Argentina, who are not known according to the US Dairy Export Council, there has been a significant rise in production. The world has also seen an increase in demand overall for cheese, which contributes to the rise in exports. Lastly, the fight to have the lowest price worldwide is a battle in which the US is consistently a front runner, and the US and the European Union are the two biggest producers of cheese worldwide. These five things are all intertwined in the driving force of globalization for the cheese industry.

Technological advancement is the second driving force for the cheese market that plays itself out in two main areas: process control and milk standardization. Process control consists of the steps necessary to complete a finished product of cheese. According to Science Direct, there have been shifts of manufacturers from computer chips to computer software control programs, as well as vat design and production methods, that increase efficiency. The second main area is milk standardization, which is a result of increasing the mass production of cheese. The article, "Major Technological Advances and Trends in Cheese" by Science Direct says in regards to milk standardization, "Consequently, creative membrane processing of milk makes it possible to standardize milks to precise casein, fat, serum protein, and lactose contents. Whether it is an economic viable option for all cheeses remains to be seen."

The third driving force is societal trends both locally, nationally, and internationally. Each has seen changes in the consumer preferences for cheese. Consumers are shifting from processed cheeses with a long shelf life and melty texture to those with more natural ingredients. This has been the biggest societal trend we have seen that has caused many cheese companies to rethink their production of cheese.

The fourth driving force factor is environmental issues, specifically relating to the sustainability of the environment from a natural perspective. There are two big issues currently facing cheese manufacturers; the problem of using rBGH and the amount of greenhouse gases that producing cheese makes. This data is primarily coming from the Conscious company, which is a business focused on environmental health. RBGH, or recombinant bovine growth hormone, is used to increase milk production in cows. Studies have linked this hormone to significant health problems in cows long term, and there has been a correlation to cancer in humans as well. As for greenhouse gases, the production of cheese is the third-highest greenhouse gas producer in protein behind only cows and lambs. This creates potentially a huge problem in that greenhouse gases are contributing to climate change.

3. Success Factors

Looking at success factors, there are three main ones, according to Dairy Enterprise Services: development of an overarching plan and management team, long term viability, and capital efficiency. In the management team, if you don't set a goal and objectives, progress can be inefficient. In the management team, it is important that everyone is on the same page, from production to marketing. Secondly, the health of the cows or goats is essential to your business. If they are not being taken care of properly in a sense of herd turnover, herd health, and feed quality, the company and products will suffer. Lastly, for capital efficiency, there has been a trend in recent years of consolidation, so as people exit the industry, it becomes harder and harder for businesses to make investments in assets that will have great returns.

4. Industry Attractiveness

Looking lastly at the industry attractiveness according to Michael Porter's model, there are five criteria to determine how attractive the industry is. The competitive rivalry was elaborated previously in the competitive analysis. However, in a general summary, Kraft faces five main competitors along with a couple of others in their market of cheese production. Moving towards supplier power, it is important to first consider how easy it is for suppliers to change their prices. According to Statista, the retail price of processed cheese has decreased from $4.71 in 2014 to $3.91 in 2019 per pound, while the price for natural cheese has gone up from $4.90 in 2016 to $5.32 in 2019 per pound. Thus, the flexibility for suppliers to increase prices is not high. According to Cheese Reporter, there are 369 cheese producers worldwide, and there would be minimal cost in switching suppliers since competition in the cheese market is extremely fierce.

When it comes to buyer power, buyers are more likely to drive the prices down. According to Statista in congruence with Think USA Dairy, the demand is expected to rise worldwide for cheese, while the price for processed cheese has fallen each year from 2014 onward, and there has been a rise in the price of natural cheese. Therefore, the buyers in the cheese industry pose the greater power to lower prices of cheese than suppliers. In terms of the US according to Statista, the average person consumes 40 pounds per year. The US produces around 5,950,000 million metric tons per year, while worldwide there were over 20,380,000 million metric tons of cheese produced last year in 2019. It would cost the buyer minimal to switch which company they purchase from.

The threat of substitution in the cheese industry is one that is dependent upon the group of consumers. For those that don't have dairy restrictions, the likeliness of consumers purchasing a non-dairy cheese is very low, according to consumption trends found by Statista. The main group of focus here is those that can have dairy products. As the demand for cheese is rising both domestically and internationally, and there are no signs of slowing according to numbers from Statista, the threat of substitution is not likely.

The threat of new entry within the cheese industry is a mild concern considering the high number of companies that have a foot in the industry. Since the level of competition is high but the barriers to entry are medium at most, a company could easily enter the market. While this is a small concern for companies in the industry, it is important to consider when laying out a long term strategy.

The cheese industry can be an attractive industry depending upon the angle taken. If one is trying to compete in the generic cheese category, that sector of the cheese industry isn't very attractive due to the fact there are many competitors and large economies of scale. However, if aiming to produce more unique and specialty cheese, the industry is attractive due to a wide variety of preferences from consumers and lower economies of scale.

B. Buyer Analysis

1. Total Market Segmentation

The market segments that exist here are distinguishable, relevant, and homogenous, derived from combining data from the Journal of Dairy Science and Research Gate. There are four relevant segments to break the market down into based upon the criteria of being the most influential in terms of demand: middle-aged families (35-65) with children in number fewer than

five that live in rural areas that are in the high socioeconomic class, younger aged families (below 35) that live in the urban center that have five or more kids that are in the middle socioeconomic demographic, middle-aged families (35-65) with four or less children that live right outside the urban center that are in the low to middle socioeconomic spectrum, and lastly, older aged (65+) families that have four or less children that live in urban centers that are in the middle socioeconomic bracket.

These segments have been derived based upon the highest demand found within general populations. The second segment group has the highest percentage of people in it amongst the population. The main reason for this second segment to be most influential in terms of demand is due to the fact that this research shows that young kids play a significant impact on the choice of food products for the family, especially when coming to cheese products. The last segment is the smallest in regard to the percentage of the population. The main reason for this is that the children of these older-aged parents have more than likely moved out of the house causing demand to decrease.

2. Buyer Description

According to Statista, the average person in the US eats 40 pounds of cheese per year. In this consumption, there is a significant growth in the number of people who are now demanding more unprocessed cheeses than processed cheeses. A conclusion we can make based on this fact is that there is a growing segment of buyers that are more focused on health consciousness and that this must be considered when producing, selling, and marketing a certain cheese product. People will also, according to recent historical trends, continue to buy more and more cheese as demand rises overall in the cheese industry. Buyers are more than ever consuming more cheese,

and according to Statista research, these trends will continue as well. In these consumptions, consumers in the industry have two favorite types of cheese in terms of pounds eaten per year, American cheese and Italian cheese.

There are many buyers in the cheese industry, but three categories these buyers from our research typically fit into: the health conscious buyer, the convenient buyer, and the in between buyer. For the health conscious buyer, these are the people that take ingredients and how the product is made into high consideration when buying cheese. The convenient buyer is the group of people that will buy cheese based upon how cheap it is, how long it can last, and the uses of that cheese. This group typically falls into buying almost always processed cheese since processed cheese fits those three categories. Lastly, there is the group of consumers who are somewhere in between. These are people that want to be health conscious but also don't want to pay too much money for a simple item as cheese.

3. Quantification Statistics

In terms of quantification statistics, we look at how many consumers are in the market, specifically for the US. This data has been derived from Statista from the year or 2019. There are about 330.27 million people in the US; of those 330.27 million, there are 230.78 million people who eat cheese. That is 69.88% of the entire population of the US. From those 330.27 million potential consumers, 95.46 million of those don't eat cheese; that is 28.9% of the population of the US. Lastly, 4.03 million of those people in this research said they either don't know or did not answer the question posed; which is 1.22% of the population.

There is no single factor to success in this industry, but multiple factors that contribute. The two broad categories of cheese are processed and natural, the natural industry being a much

more attractive and viable option for those looking to enter. Within this industry, there are segments for companies to be aware of, including both their products as a company and the total number of consumers in the cheese market, as ultimately the cheese market exists for both the company and for the consumer.

II. Strategic Marketing Analysis

A. Major Problem

To begin analyzing the issue it should be noted that Kraft Singles do not contain enough unprocessed ingredients to be deemed a "real cheese" by the U.S. Food and Drug Administration. Therefore, Kraft Singles are labeled "pasteurized prepared cheese product", meaning that they contain less than 51% cheese. As the younger generations of consumers are shifting to a more health-conscious view when it comes to purchasing decisions, they are avoiding preservatives, and preferring more natural ingredients. *See Appendix J Figure 4.* Therefore, the previously popular processed cheese product, Kraft Singles, is declining in sales.

For a deeper analysis of Kraft Singles' issue, it is important to look into the product's strengths, weaknesses, opportunities, and threats. When it comes to Kraft Singles' strengths, Kraft is one of the most well-known and easily recognized brands. While Kraft Singles' sales have fallen in recent years, they are still one of the top products in the sliced cheese market, as they have a very competitive price compared to some of the more natural sliced cheese options, such as Private Selection and Sargento. Current Kroger prices stand with Kraft Singles at $0.28 per slice, while Private Selection is at $0.45 per slice, and Sargento is at $0.34 per slice.

One of the main weaknesses of Kraft when it comes to their Kraft Singles is that this product is not approved by the FDA, which is not favorable in the eyes of young consumers that

are shopping for healthier products. The things that people once loved about Kraft Singles, such as the way they melt and their long shelf-life, are now pushing consumers away, as these are qualities attained with the use of preservatives, emulsifiers, and processed ingredients. Another weakness of Kraft is that as their sales take a hit, their stock market value has decreased. According to Business Insider, this decline began in 2017, around the same time the demand for more natural cheeses began to increase. Kraft's stock market price is now only a third of what it was in 2017, going from $96.68 to its most recent price of $31.88, showing no signs that it will stop decreasing if current trends continue.

This leads to an opportunity for Kraft to reinvent it's Kraft Singles into a product that appeals to, instead of pushing away, today's young consumers. If Kraft Singles were modified into a product containing less artificial preservatives and more natural ingredients, they could surpass the benchmark of 51% real cheese required by the FDA to be considered a "cheese," as opposed to "pasteurized prepared cheese product." Between 2013 and 2017, sales of processed cheese, such as Kraft Singles, had a growth rate of only 0.3%, while unprocessed cheese had a much greater growth rate of 3.3%. A higher growth rate for the sales of unprocessed cheese is expected to continue, as it is forecasted at 4.5% between 2018 and 2022, while that of processed cheese is predicted to lag behind at 1.3%. While Kraft makes a few unprocessed cheese products, like their shredded cheese, Kraft Singles are not in this category. If Kraft can reformulate their Kraft Singles, this product could be moved into the category of unprocessed cheese, giving it the chance for ascending sales as a product with a significantly higher growth rate.

Lastly, as far as threats to Kraft Singles, if Kraft does not act soon competitors could gain a running ground in the growing market for unprocessed cheeses. In 2019, while Kraft was still

in second place for sales of sliced cheese at $181.97 million, private label brands, like Kroger's Private Selection, greatly surpassed Kraft with total sales of $659.73 million. Despite recent drops in sales, Kraft Singles are still a widely known product, but with rising sales of unprocessed, more natural cheeses, Kraft Singles are a product in danger. As more of their competitors are offering a variety of natural options, Kraft faces the risk of consumers becoming loyal to competing brands before Kraft is able to adapt to the market that is moving towards better, healthier ingredients.

B. Current Marketing Strategies

When analyzing Kraft's current marketing strategies for their Singles, they are very similar to what they have been for many years. When looking at the product, promotion, place, and price, Kraft Singles are most often marketed towards children and the parents of children with an emphasis on their unique melt.

Kraft Singles slices are each individually wrapped, and then packaged together in stacks ranging from 12 to 42 to be sold together. The outside wrapping of these stacks is blue, which is used in marketing often to relay a trustworthy and dependable brand. They also picture a grilled cheese, one of the basic staple foods of many American children. The way these slices melt on foods such as grilled cheese may appeal to children, and the individually wrapped slices may appeal to parents of these children as a convenience.

Just like their product packaging, Kraft Singles' promotional efforts are also heavily aimed towards children, almost always depicting a grilled cheese, and often showing children along with their cheesy sandwiches. The Kraft website describes Kraft Singles with phrases such as "ooey-gooey" and "unmistakable creamy melt," highlighting the way that Kraft Singles melt

differently than other sliced cheeses. This is the melt achieved by the additives that cause the Singles to fall short of FDA standards of real cheese.

When analyzing the placement of Kraft Singles in stores throughout the U.S., they are found in most retail grocery stores such as Kroger, Walmart, and Target. This means they are easily found, adding to the convenience aspect of the product, and as mentioned earlier, Kraft Singles still hold an upper hand on some other sliced cheeses when it comes to having lower prices. As far as shelving and product positioning within the stores themselves, Kraft Singles are located in the dairy section with the other cheeses. However, as opposed to most sliced cheeses hanging on the wall, Kraft Singles are placed in stacks underneath most of the other cheeses.

This positions them at the eye level of many of the children that Kraft's marketing efforts for their Singles have been aimed towards.

According to The New York Times, Kraft Singles were first introduced in 1965, when processed foods were all the rage, but sales have started declining in recent years. Since 2014, consumers have been willing to pay increasingly less for processed cheeses like Kraft Singles, putting them at their lowest retail price in 2018 since 2011. This places Kraft Singles in a stage of maturity, as until recently, most of their sales were on the rise for the majority of their life-cycle since introduction. If current trends continue and Kraft does not find a way to change their Singles along with the changes in the market, their sales will only continue to decline.

C. Target Market

While some families are still purchasing Kraft Singles for convenience, younger generations are becoming more concerned about what ingredients they are putting into their bodies and are rejecting the previously popular processed Kraft Singles. This market of Generation Zs and Millennials are taking a healthier approach when it comes to the benefits of organic and unprocessed foods. In 2014, Kraft came out with a statement saying they were going to eliminate the preservatives in their cheese, but all they did was switch out preservatives and started using preservatives that are considered to be natural. As Gen Zs and Millennials are becoming older, they are now the ones that have or will soon have young children. As these young parents are moving towards unprocessed foods, Kraft's current Singles, still made with preservatives and considered a processed cheese product, will not survive in this market. Kraft's target market for their Singles has been children and their parents for years, and this is still a

market in which Kraft Singles will succeed as long as they are adapted to fit into the healthier lifestyle of these consumers.

III. Market Research Study

A. Study Summary

The survey was conducted on Qualtrics and field on February 15, 2020. We sent out the survey to 150 people with a little incentive. When compiling questions to put into the survey, the questionnaire flow is a very important concept to keep in the back of your mind. We started by thinking of the overarching issue of Kraft Singles, that is: Why does Kraft Singles continue to decrease in stock market sales? Then, we thought about our main hypotheses to help address this issue. Some of the hypotheses we came up with were: Kraft has more of a negative social recommendation than Private Labels, Kraft ingredients do not measure up to its Private Label competitors, Kraft doesn't do effective job advertising trustworthy nutritional value opposed to Private Labels, and Kraft has more artificial preservatives compared to Private Labels. Overall, Kraft could be lacking in many different areas, these are just some of our reasons as to why. Our goal was to send out a survey that anyone could answer, whether they are aware of Kraft Singles or not, that is as unbiased as possible and easy to complete. We also made sure to include different brands in the survey. This is very important in every survey because it gives the conductors a benchmark to compare. We know that numbers do not have meaning, but the benchmark helps you bring meaning to numbers by comparing.

To start the flow of the survey we started with a brief message with text only. This statement includes how long the survey will take, instructions, and thanking the survey takers. Our message to survey takers stated: ”Thank you for agreeing to complete this survey. The

survey will likely take 10-15 minutes to complete. Please answer every question to the best of your ability. We used the funnel technique, meaning we started with easier and more broad questions, then as the survey continues, goes into more specific questions. So, we started out asking how many servings (slices) have been consumed in the past 30 days. This is a very general question and also does a great job at disguising who the study sponsor is because we are asking about any consumed. Then, we ask an open-ended question, "Which brands of sliced cheeses are you aware of, if any?" . This also disguises the sponsor and is unbiased because the survey taker doesn't have many options to choose from, so they are not influenced by anything. Then, there are a series of matrix questions that get a little more difficult and involve a little more reading as they go on. All of these matrix questions ask the same thing, but about different brands, this continues to conceal the identity of the sponsor to avoid biases and creates that benchmark mentioned earlier. We also made sure to include in the matrix table questions to add an option for those who were unsure or those who have never tried the brands mentioned. So, the options, "I'm not sure" and "I am not familiar with this brand." were included. This ensures that everyone can take the survey, whether they are familiar with the brands or not. To end the survey, demographic questions are last to be asked.

Out of the 150 emailed surveys, the initial returned sample size consisted of 119 respondents as shown *Appendix C*. A sample size is the number of completed responses our survey received. A sample represents part of the group of people (or target population) whose opinions or behaviors we care about. The percentage of the individuals who fill out a survey is known as the "response rate". Response rates vary widely depending on a number of factors such

as the relationship with our target audience, survey length and complexity, and or incentives provided. Out of the 119 surveys sent the overall response rate for this research is 79% (119/150= 79.33% or 79%). A good max response rate is 10% as long as it does not exceed 1000.

Well in the range of an acceptable sample size, and continuing the method flow we incorporated quality control, or attention checks to narrow down a precise data set for our analysis. An attention check question is designed to ensure that people are at high attention throughout the survey, or they are disqualified from the study. As the respondent followed the survey prompts, they came to a statement as *Appendix A Figure 1* states "Yesterday, I had a fatal stroke after watching television". After filtering out respondents who did not answer, "Strongly Disagree, and OR Disagree" to the stroke question, were removed from the study. The quality check dropped our sample size for data analysis from 119 to 76 *Appendix D Figure 2.*

All questions within the survey, except the unaided awareness question, used nominal and ordinal data measurement scales. An ordinal or "ordered" scale allows you to evaluate a respondent's attitude towards a subject by using a set of ordered responses. Unfortunately, data exported out of Qualtrics or any survey software is not in a final format. Text is difficult to measure. To simplify and better analyze the data from Qualtrics we used a shorthand method and coded 1's for YES, and 0 's for No within Microsoft Excel refer *Appendix Je Figure 1.* We further prepared the raw data for analysis using "Plug Rules" or replacement rules to account for missing data for the attribute rating survey question. The attribute ratings are Likert scale questions, which offer respondents an ordered range of answers from one extreme to another. We ask questions in the survey such as "Now, think just about Kraft Single and please answer the

following questions to the best of your ability...” possible statement “Is a healthy choice for my family”. Answers ranged on a 5- point scale from strongly disagree to strongly agree *Appendix D Figure 1.* We need a survey that everyone can go through the same sequence of questions. In case someone was not aware of Kraft Singles, we had statements such as “I am not sure” or “I am not similar with this brand”. The data exported resulted in 6’s and 7’s. This did not mean that the respondent super-strongly agrees or super-duper strongly agrees. This simply means that the respondent didn’t have enough information to answer the question. Without enough information to answer the question we do not want to use that to make assumptions. To extract this unwanted data, we used the find/replace dialogue box in Microsoft Excel to list the 6 and 7 cells as blanks to efficiently move forward with the method flow.

As previously mentioned, we asked a top of mind unaided awareness question in the survey. Unaided awareness is the percentage of respondents aware of your product, brand, or advertising top-of-mind without being assisted. The output of this question is not a 1,2,3… rather it is text data that the respondent typed in. Text data is notoriously hard to analyze, the text or qualitative data needed to be converted into numeric data. Once convert we were able to understand what percentage of the sample size has top of mind awareness for any given sports drink. We read and reviewed the open-ended comments from about 15% of the sample. As we read the comments, we kept a list of general comment categories, called a code frame. For each brand that a respondent listed, a column in Microsoft Excel is created following 1’s for YES if mentioned by the next respondent and so on. Find and replace was then used to fill the blanks with 0’s for NO, allowing us to easily analyze the data following the end of the method flow *Appendix G Figure 1.* In order to clean the data exported by Qualtrics we re-weighted questions,

such as age, slices consumed, etc. When data was exported from Qualtrics, the response option for example the age of children in the household is listed between 1-5. This did not mean that the respondent has a child the age of 4 but rather selected the 4th answer listed within the survey which stated the respondent's child in the household is between the age of 18 or more. We followed the process of incorporating nest-IF statements to replace 1-7 response options. We had to recode these questions for better analysis by taking the midpoint of the range of age, serving (slices) consumed, etc.

B. Findings, and Implications

Our research was conducted to understand the reasoning behind why in the market Kraft Singles have consistently decreased year after year. Our survey results allowed us to generate primary data, while secondary data researched from several online sources was used to back up our analysis and draw more thorough conclusions. Using analysis tools such as graphs, t-tests, and perceptual maps to explain how we transformed our data to determine which of our hypotheses to accept, and which of those to reject. For research purposes we tested the attribute ratings for meaningful differences if they were within our hypotheses.

1. **Advertising**

Our hypothesis suggests that Kraft Singles doesn't do an effective job advertising trustworthy nutritional value than Private Labels. *Appendix J Figure 7* allows for one to see the average response to our Kraft Singles and Private Selection advertising would be likely to buy. Combined with previous SPSS tests we are able to build on the implication that consumers may find the given statements un-trustworthy. *Appendix K figure 4* illustrates our sample t test for our hypothesis. Our null hypothesis was '**Ho**: There is <u>not a difference</u> between Kraft and Private

Selection Product Advertising Description', and or alternative hypothesis '**Ha**: There is a difference between Kraft and Private Selection Product Advertising Description'. We concluded that the Sig 2 tailed of significant value is p= .000 which is well in excess of our 95% rating. We rejected the null, that there is not a difference between Kraft Private Selection Product Advertising Description, and accepted the alternative.

2. **Competitor Ingredients**

Our hypothesis suggests that Kraft Singles doesn't measure up to competitor Private Labels. *Appendix J Figure 4* allows for one to see the average response to our Kraft Singles and Private Selection contains natural ingredients on a 5pt scale would either agree to disagree with that statement. *Appendix K Figure 5* illustrates our sample t test for our hypothesis. Our null hypothesis was '**Ho**: There is not a difference between Kraft and Private Selection ingredients', and or alternative hypothesis '**Ha**: There is a difference between Kraft and Private Selection ingredients'. We concluded that the Sig 2 tailed of significant value is p= .001 which is well in excess of our 95% rating. We rejected the null, that there is not a difference between Kraft Private Selection Product ingredients, and accepted the alternative.

3. **Social Recommendation**

Our hypothesis suggests that Kraft Singles is a Private Labels. *Appendix J Figure 4* allows for one to see the average response to our Kraft Singles and Private Selection Kraft has more of a negative social recommendation to family and friends than Private Labels, *Appendix J Figure 6* illustrates our sample t test for our hypothesis. Our null hypothesis was '**Ho**: There is not a difference between Kraft and Private Selection social recommendation', and or alternative

hypothesis '**Ha**: There is a difference between Kraft and Private Selection social recommendation'. We concluded that the Sig 2 tailed of significant value is p= .017 which is in excess of our 95% rating. We accept the alternative, that there is a difference between Kraft Private Selection Product social, and reject the null.

4. Contains Artificial Ingredients

Lastly of our hypothesis SPSS test runs concluded that Kraft Singles based on respondents attribute rating agree Kraft has more artificial preservatives compared to Private Labels. Our null hypothesis was '**Ho**: There is not a difference between Kraft and Private Selection amount of artificial preservatives', and or alternative hypothesis '**Ha**: There is a difference between Kraft and Private Selection amount of artificial preservatives'. We concluded that the Sig 2 tailed of significant value is p= .009 which is in excess of our 95% rating. We accept the alternative, that there is a difference between Kraft Private Selection Product artificial preservatives, and reject the null. *See Appendix K Figure 7.*

IV. Recommendation

Based on our extensive analysis of primary and secondary data the major problem facing Kraft is the overall health of the product. Younger consumers are seeking a healthier option gearing more towards natural products and better ingredients to match their health-conscious lifestyle that Kraft is currently not leading up to. Kraft Singles do not contain enough unprocessed ingredients to be deemed a "real cheese" by the U.S. Food and Drug Administration so our recommendation for Kraft is to change their ingredient list to contain healthier ingredients and be considered a "real" cheese. Our research conveyed that the top two reasons Kraft is lacking behind its competitors is its ingredients and added preservatives.

A. Defined Recommendation and Alternatives

Since Kraft Singles are lacking in the perception of healthiness and amount of consumers purchasing cheese, our recommendation is to improve the overall health of the product and diversify Kraft's ingredients to do away with preservatives, color dye, and artificial ingredients. By replacing preservatives with extra salt, the cheese will feel lighter and more natural tasting, factors for which consumers have shown preferences for their health concerns. The new product line will promote the health benefits by advertising to accommodate for the market shift toward natural products. This will add a brand for consumers to choose from in the organic market place, the price will remain relative to current competitors' products, it will be distributed to all retailers that currently sell Kraft products, and it will provide consumers with a new, healthier option for Kraft Cheese. Another option would simply remove some of the artificial ingredients currently in Kraft Singles. Currently, Kraft Singles are not even allowed to be called cheese, according to the FDA. Therefore, a more inexpensive option would just be removing some of the artificial flavoring and adding a natural ingredient so that Kraft is more than just 52% cheese. Based on these improvements we will advertise the new product line as an all-natural cheese, rather than pasteurized prepared cheese.

B. Cost/Benefit Analysis

Our recommendation is better for Kraft than its competitors, because unprocessed cheese brands are already more preferred with these attributes of taste and ingredients offered than Kraft, based on results from our survey. Kraft Singles are well-known, but they are not approved by the FDA. Younger generations are very conscious about the ingredients in their products.

With the improvement of the ingredients in Kraft Singles, this will attract younger customers and lead to rising sales.

C. Expected Results

To determine the expected results for producing this new proposed product line, we used secondary research to discover the cost of the inventory needed as well as advertising spending.

To calculate the cost of inventory, we first needed to establish the cost of the cheese's main ingredients, which are milk and salt. According to Organic Valley Whole Milk, milk is $3.98 for a gallon. Because there are only .8lbs in 1 package of Kraft Singles, we can conclude that the cost of milk is less than $1.50. The second ingredient is salt. Since we are getting rid of all preservatives, the extra salt will take the place and work as a preservative. According to the USDA a slice of American cheese should have no more than 468mg of salt per slice of cheese. One pack of 42 slices of Kraft Singles contains 18,720 mg of salt which ends up costing less than 5 cents per pack of cheese. Moreover, because the cost of salt is so minimal, it does not need to be taken into account when calculating the cost of ingredients. Sheetlabels.com claims a cheese label costs around 50 cents. Therefore, the overall cost of producing one new cheese packaging label from our proposed product line will cost a total of 50 cents.

After calculating the cost for 1 cheese package which contains 42 slices, we used multiple secondary sources to find the overall spending on inventory. According to Forbes, in 2015 Kraft had 37.95% of the American cheese market. In 2019, Kraft sold 161.13 million packages of cheese. When we multiply that by the $2 cost of making 1 package, the inventory expense is $322.25 million.

Kraft's advertising expense was $403 million in 2018, which was slightly lower than in previous years. Since Kraft has a total of 26 brands accounted for in that advertising expense, we must divide $403 million by 26 to account for the other brands. We discovered the advertising spent on one brand is $15.5 million. We then added the cost of inventory, $322.25 million, with the cost of advertising spending, $15.5 million, to find that the overall cost of producing a new product line is $337.3 million.

Next, we calculated the return on investment (ROI) for our proposed marketing activity. By subtracting Kraft's ending revenue by its starting revenue, we found the incremental gross revenue to be $25.977 billion, and when multiplying this by our gross margin of 32% ("MacroTrends," 2019), gave us an incremental gross margin of $8.31 billion. After subtracting this incremental gross margin by the incremental marketing cost of the new product line divided by the incremental marketing cost, we determined the ROI for our marketing solution to be 2.46%.

Now that we have determined all of the costs of our new product line, it can be implemented. Changing the ingredients should attract more buyers, who are focused on health benefits and nutrition in products.

1. Implementation Flowchart

Purchasing Ingredients from Wholesalers(April 2020)→Manufacturing Cheese(April 2020)→Developing New Kraft Packaging(May 2020)→Sending to Retailers(June 2020)→Review and Evaluation(February 2021)

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2. Evaluation Procedure

Since the overall goal of our new product line is to increase Kraft's sales, we should be able to determine the results of our recommendation within the first two quarters after our launch which would be February 2021 for the review date. After our launch of the new product line, we will closely monitor results and changes. Since Kraft's sales have been steadily declining over the past few years, if we see an increase in sales compared to prior years, we will continue to develop all Kraft products with better ingredients, not just Kraft Singles.

Appendix A
Questionnaire

Default Question Block

Thank you for agreeing to complete this survey. The survey will likely take 10-15 minutes to complete. Please answer every question to the best of your ability.

How often do you buy sliced packaged cheese?

- Never
- Once a month
- Once a week
- More than once a week

In general, how many servings (slices) of packaged cheese have you consumed in the past 30 days?

- 0 servings
- 1 serving
- 2-6 servings
- 7-9 servings
- 10-12 servings
- 15+ servings

When making purchases at the grocery store, what factors are important to you?

Please rank with 1 being the most important and 5 being the least important.

- Accessibility
- Recognizable logos
- Low price
- Nutrition
- The brand is popular amongst my peers

What is your budget for sliced cheese per purchase?

(Drag the slider below)

What brands of sliced cheese are you aware of if any?

(Please list in the box below with each item on a new line (i.e. press return after each result). If you aren't aware of any sliced cheese brands, please just type "None" in the box.)

Which of the following brands of sliced cheese are you aware of, if any? Please mark all that apply, including any you have listed on the previous question.

- [ ] Borden
- [ ] Kraft
- [ ] Private Selection
- [ ] Sargento
- [ ] Velveeta
- [ ] None (I do not eat Cheese)

In general, how many servings (slices) of the following sliced cheeses have you consumed in the past 30 days?

	0 Servings	1	2-6	7-9	10-12	13-15	16-20	21-26	27-30	More than 30 servings
Borden	○	○	○	○	○	○	○	○	○	○
Kraft	○	○	○	○	○	○	○	○	○	○
Private Selection	○	○	○	○	○	○	○	○	○	○
Sargento	○	○	○	○	○	○	○	○	○	○
Velveeta	○	○	○	○	○	○	○	○	○	○
Other (?)	○	○	○	○	○	○	○	○	○	○

How easy is it to find the following brands of sliced cheeses in the store where you usually shop for this type of product?

	Very Difficult	Difficult	Neutral	Easy	Very Easy	I'm not sure	I have not seen this brand before.
Kraft	○	○	○	○	○	○	○
Private Selection	○	○	○	○	○	○	○
Sargento	○	○	○	○	○	○	○
Velveeta	○	○	○	○	○	○	○

Overall, how satisfied are you with each of the brands of sliced cheeses you have used?

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	I am not sure.	I have not used this brand before.
Kraft	○	○	○	○	○	○	○
Private Selection	○	○	○	○	○	○	○
Sargento	○	○	○	○	○	○	○
Velveeta	○	○	○	○	○	○	○

For those brands of sliced cheese that you have **NOT** used in the past 30 days, how likely are you to buy them in the future, if at all?

	Very Likely	Likely	Neutral	Unlikely	Very Unlikely	I have purchased this brand within the past 30 days.
Kraft	○	○	○	○	○	○
Private Selection	○	○	○	○	○	○
Sargento	○	○	○	○	○	○
Velveeta	○	○	○	○	○	○

Now, think just about **KRAFT SINGLES** and please answer the following questions to the best of your ability (there is no right or wrong answer). How much do you agree or disagree that **KRAFT SINGLES**…

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	I am not sure.	I am not familiar with this brand.
Is a brand that I will socially recommend to family or friends?	○	○	○	○	○	○	○
Is a healthy choice for my family	○	○	○	○	○	○	○
Is easy for me to find where I shop	○	○	○	○	○	○	○

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	I am not sure.	I am not familiar with this brand.
Satisfies my hunger	○	○	○	○	○	○	○
Has a better taste	○	○	○	○	○	○	○
Melts to perfection	○	○	○	○	○	○	○
Has nutritional value	○	○	○	○	○	○	○
I have not tried this product before	○	○	○	○	○	○	○
Is a good value for the price	○	○	○	○	○	○	○
Yesterday, I had a fatal stroke after watching television	○	○	○	○	○	○	○
Is a product that I often see advertised on television	○	○	○	○	○	○	○
Contains artificial preservatives	○	○	○	○	○	○	○
Is made from natural ingredients	○	○	○	○	○	○	○

Now, think just about **PRIVATE SELECTION** sliced cheese. Please answer the following questions to the best of your ability (there is no right or wrong answer). How much do you agree or disagree that **PRIVATE SELECTION** sliced cheese…

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	I am not sure.	I am not familiar with this brand.
Is a brand that I will socially recommend to family or friends?	○	○	○	○	○	○	○
Is a healthy choice for my family	○	○	○	○	○	○	○
Is easy for me to find where I shop	○	○	○	○	○	○	○
Satisfies my hunger	○	○	○	○	○	○	○
Has a better taste	○	○	○	○	○	○	○
Melts to perfection	○	○	○	○	○	○	○
Has nutritional value	○	○	○	○	○	○	○
I have not tried this product before	○	○	○	○	○	○	○
Is a good value for the price	○	○	○	○	○	○	○
Yesterday, I had a fatal stroke after watching television	○	○	○	○	○	○	○
Is a product that I often see advertised on television	○	○	○	○	○	○	○
Contains artificial preservatives	○	○	○	○	○	○	○
Is made from natural ingredients	○	○	○	○	○	○	○

Please read the following short product description and mark how likely you would be to buy this sliced cheese product in the future?

	Very likely to buy	Likely to buy	May or may not buy	Unlikely to buy	Very unlikely to buy	I'm not sure.
Private Selection - " A bite of happiness made with 100% real, natural cheese."	○	○	○	○	○	○
Sargento- " A bite of happiness made with 100% real, natural cheese."	○	○	○	○	○	○
Kraft- " A bite of happiness made with 100% real, natural cheese."	○	○	○	○	○	○
Private Selection- "Health is #1, we serve the cheese with complete nutrition in mind."	○	○	○	○	○	○
Sargento- "Health is #1, we serve the cheese with complete nutrition in mind."	○	○	○	○	○	○
Kraft- "Health is #1, we serve the cheese with complete nutrition in mind."	○	○	○	○	○	○

Now we would like to ask some questions related to how you think about yourself relative to other people. How much do you agree or disagree with the following statements?

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	I am not sure.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	I am not sure.
I conduct research on my own (magazines, Internet) on the nutritional value of foods, food brands, and restaurant menus	○	○	○	○	○	○
I read the Nutrition Facts on product items	○	○	○	○	○	○
I prefer natural products over processed ones	○	○	○	○	○	○
I am willing to spend more on natural products over processed ones	○	○	○	○	○	○
I'll buy whatever product is cheapest, regardless of nutrition	○	○	○	○	○	○
If the price was disregarded, I would choose natural cheese over processed cheese.	○	○	○	○	○	○
I would rather feed my family natural cheese over processed cheese.	○	○	○	○	○	○

Finally, we would like to ask some general classification questions.

(Please select the arrow at the bottom to move on)

What do you identify as?

- ○ Male
- ○ Female
- ○ Rather not answer

What is your birth year?

Do you have any of dietary restrictions listed below?

- ☐ Organic
- ☐ Gluten-free
- ☐ Sugar-free
- ☐ Vegan
- ☐ Vegetarian
- ☐ Kosher
- ☐ Allergic to nuts
- ☐ Lactose Intolerant
- ☐ I don't have any restrictions

What is your marital status?

- ○ Single/Never married
- ○ Single/ Divorced
- ○ Married
- ○ Widowed
- ○ Separated
- ○ Other

What is your household size?

- ○ 1
- ○ 2-4

- ○ 5-7
- ○ 8 +

Are there any children in your household?

- ○ Yes
- ○ No

What is the age range of children in your household?
(Please select all that apply to you)

- ☐ 1-5
- ☐ 6-11
- ☐ 12-17
- ☐ 18+
- ☐ I do not have children currently living in my household

What is your highest level of education?

- ○ Some high school
- ○ High school graduate
- ○ Some college, no degree
- ○ Associate's degree
- ○ Bachelor's degree
- ○ Graduate degree, Masters
- ○ Graduate degree, Doctorate

What is your race/ethnicity?

- ○ African American
- ○ Asian Hispanic
- ○ White/Caucasian
- ○ Other
- ○ I prefer not to answer

Appendix B

Raw Data

StartDate Start Date	EndDate End Date	Status Response Typ	IPAddress IP Address	Progress Progress	uration (in second uration (in secc	Finished Finished	RecordedDate Recorded Dat
2/24/20 18:42	2/24/20 18:56	0	174.241.7.117	100	803	1	2/24/20 18:56
2/24/20 18:59	2/24/20 19:07	0	74.138.149.40	100	499	1	2/24/20 19:07
2/24/20 18:48	2/24/20 19:09	0	76.22.131.243	100	1264	1	2/24/20 19:09
2/24/20 19:26	2/24/20 19:50	0	167.160.155.65	100	1475	1	2/24/20 19:50
2/24/20 19:44	2/24/20 19:53	0	162.154.218.59	100	570	1	2/24/20 19:53
2/24/20 19:47	2/24/20 19:54	0	12.88.156.42	100	430	1	2/24/20 19:54
2/24/20 19:46	2/24/20 19:55	0	71.61.13.35	100	564	1	2/24/20 19:55
2/24/20 19:47	2/24/20 20:02	0	74.132.39.29	100	940	1	2/24/20 20:02
2/24/20 20:15	2/24/20 20:23	0	174.229.13.111	100	495	1	2/24/20 20:23
2/24/20 20:27	2/24/20 20:38	0	24.123.237.82	100	645	1	2/24/20 20:38
2/24/20 20:45	2/24/20 20:52	0	174.50.194.133	100	411	1	2/24/20 20:52
2/24/20 18:48	2/24/20 20:58	0	76.22.240.239	100	7769	1	2/24/20 20:58
2/24/20 20:48	2/24/20 20:59	0	174.241.130.189	100	659	1	2/24/20 20:59
2/24/20 20:56	2/24/20 21:04	0	172.58.142.165	100	489	1	2/24/20 21:04
2/24/20 20:49	2/24/20 21:05	0	67.187.125.66	100	935	1	2/24/20 21:05
2/24/20 21:20	2/24/20 21:34	0	108.219.193.47	100	804	1	2/24/20 21:34
2/24/20 21:34	2/24/20 21:41	0	108.219.193.47	100	443	1	2/24/20 21:41
2/24/20 21:58	2/24/20 22:06	0	174.231.2.161	100	428	1	2/24/20 22:06
2/24/20 22:03	2/24/20 22:12	0	136.58.89.60	100	500	1	2/24/20 22:12
2/24/20 21:59	2/24/20 22:19	0	76.22.221.240	100	1176	1	2/24/20 22:19
2/24/20 22:33	2/24/20 22:54	0	174.229.9.240	100	1255	1	2/24/20 22:54

Appendix C

Sample Size N=119

Count of ResponseId	Total
Total	119

Appendix D

Quality Check

Figure 1.

Quality Check Excel Spreadsheet; formula used to see which respondents passed attention check.

B2 | =IF(AP2=4,1,IF(AP2=5,1,0))

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Resp	Qua	Qua	Q2	Q3	Q4_	Q4_	Q4_	Q4_	Q4_	Q5_	Q6	Q7	Q8_	Q8_
2	R_1Pekl	1	0	2	2	1	4	5	3	2	6.02	Sargento	4		
3	R_3j69F	1	0	2	3						2.8	Private	2,3,4	1	1
4	R_2upP	0	0	2	4						3.95	Kraft, Ve	2		
5	R_1jxIo	1	0	2	3	2	1	5	4	3	4	Sargento	2,3,4,5		6
6	R_z0dJy	0	0	2	4	2	3	5	4	1	4	Kraft Sargent	2,3,4,5	0	0
7	R_23Vp	0	0	2	3	2	4	5	3	1	3.16	Sargento	1,2,3,4,	0	1
8	R_265c	0	0	3	3						6.28	Havarti	2,5	1	1
9	R_UihPc	1	1	1	1	2	5	4	3	1	4	Sargento	2,3,4,5	0	0
10	R_3M5C	1	0	1	1							Kraft	1,2,4,5	0	6
11	R_1PZr8	1	1	1	2						1.98	Kraft	2,3,4,5	1	0
12	R_1dM6	1	0	3	6	3	5	4	2	1	4.25	Kraft, Ve	1,2,4,5	0	20
13	R_3EhYr	1	0	2	3	2	3	4	5	1	3.3	Sargento	4		

Figure 2.

Pivot table displaying the sample size after quality check. Sample Size n=76

Count of ResponseId	Quality Check - Kraft Singles		
Quality Check - Private Selection	0	1	Grand Total
0	41	58	99
1	2	18	20
Grand Total	43	76	119

Appendix E

Unawareness Data

Figure 1.

Unaided Awareness Excel Spreadsheet; formula used to see which respondents

	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	UAKra	UABord	rivate Se	UASarge	UAVelve	UAOth	Q2	Q3	Q4_1	Q4_2	Q4_3	Q4_4	Q4_5	Q5_1	Q6
2	1			1			2	2	1	4	5	3	2	6.02	Sargento Kraft
3	1		1				2	3						2.8	Private sele
4	1						2	3	2	1	4	3	5	4	Kraft
5	1		1		1		2	3	2	1	5	4	3	4	Sargentino Kraft Velveeta
6	1		1				3	3	3	5	4	1	2	2.3	kroger brar
7	1					1	2	4						3.95	Sargento Kraft Babybel The Laughing Cow
8	1						2	1						1.55	Kraft
9	1						1	1							Kraft
10	1				1		3	6	3	5	4	2	1	4.25	Kraft, Velve
11	1			1	1		2	3	2	3	4	5	1	3.3	Sargento Kraft Singles
12	1		1				1	3	1	4	5	3	2	3.03	Kroger Kraft

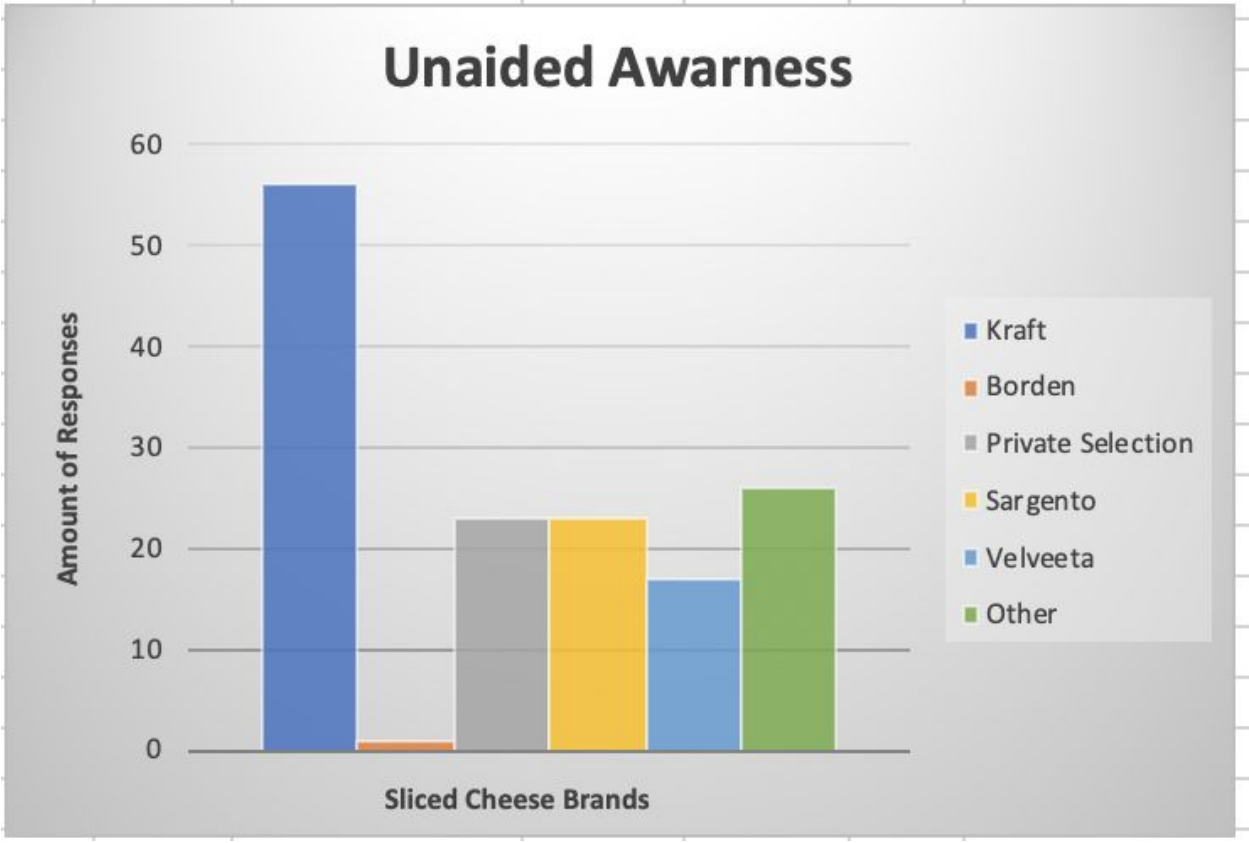
Figure 2.

Unaided Awareness Excel Pivot Table; Sum of Respondents per brand text input.

1	ResponseId	(All)
2		
3	**Values**	**Total**
4	Sum of UABorden	1
5	Sum of UAKraft	56
6	Sum of UAPrivate Selection	23
7	Sum of UASargento	23
8	Sum of UAVelveeta	17

Figure 3.
Unaided Awareness Excel Pivot and Graph; sum of respondent answers.

Kraft	Borden	Private Selection	Sargento	Velveeta	Other
56	1	23	23	17	26



Appendix F

Awareness Data

Figure 1.

Awareness Excel Spreadsheet; formula used to see which respondents

J2 fx =IF(E2=1,1,0)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ResponseId	Quality Check -	Quality Check -	UAKraft	UABorden	UAPrivate Sele	UASargento	UAVelveeta	UAOther	ABorden	AKraft	APrivate Selec	ASargento	AVelveeta
2	R_1PekIK18Mz0u25	1	0	1			1			0	1	1	1	0
3	R_3j69FOdPmzh6CjC	1	0	1		1				0	1	1	1	0
4	R_1KyaE6Ele8axn2l	1	0	1						0	1	1	0	0
5	R_1jxIoX0PqJPA2AA	1	0	1		1		1		0	1	1	1	1
6	R_2tA7yPtsr604UF1	1	0	1		1				0	1	1	1	1
7	R_10xgZsXX9u60qyT	1	0	1					1	0	1	0	1	1
8	R_30jcOfw37rBWdA:	1	0	1						0	1	0	0	0
9	R_3M5OhmGjztB4V2	1	0	1						1	1	0	1	1
10	R_1dM64RACFRhDQ	1	0	1				1		1	1	0	1	1
11	R_3EhYm3pjBD3cEbg	1	0	1			1	1		0	1	1	1	1
12	R_3Reab3BN6Qfp6D	1	0	1		1				0	1	1	1	1
13	R_1hTmZopdbCwBp/	1	0	1			1		1	0	1	1	1	1
14	R_2uKBqJmnjfZqHIW	1	0	1		1				1	1	1	1	1
15	R_3HvQqvFU3QpQ6	1	0	1				1		0	1	1	1	1
16	R_sFkhDUBjtIw1agN	1	0							0	1	0	1	0
17	R_3laGM0Ne2qoALc	1	0	1	1			1	1	1	1	1	1	1
18	R_pT6AsrSD15cFc6R	1	0				1			0	0	0	1	1

Figure 2.

Awareness Excel Pivot; average awareness of each brand

1	ResponseId	(All)
2		
3	**Values**	**Total**
4	Average of ABorden	31.6%
5	Average of AKraft	97.4%
6	Average of APrivate Selection	85.5%
7	Average of ASargento	84.2%
8	Average of AVelveeta	84.2%

Figure 3.

Awareness Excel Pivot: Specific Kraft and Private Selection used for SPSS mean testing.

Values	Total
Average of AKraft	97.4%
Average of APrivate Selection	85.5%

Appendix G

Triers and Repeaters

Figure 1.

Triers and Repeaters Excel Spreadsheet; formula used to see which respondents are trier and repeater using 1's and 0's.

P3 =IF(AD3="","",IF(AD3=0,"",IF(AD3>=2,1,0)))

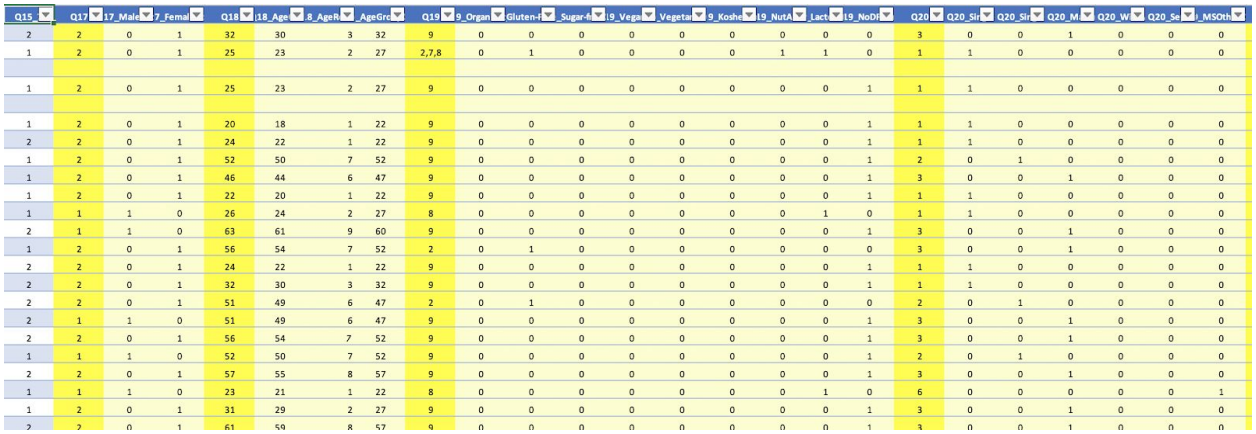
	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	AKraft	UABord	UAPriva	UASarge	UAVelv	UAOthe	ABord	AKraf	ivate Se	ASarger	AVelve	KraftSin	KraftSin	Private-	Private-
2	1			1			0	1	1	1	0				
3	1		1				0	1	1	1	0	1	0	1	1
4	1						0	1	1	0	0	1	1	1	1
5	1		1		1		0	1	1	1	1	1	1	1	1
6	1		1				0	1	1	1	1	1	1	1	0
7	1					1	0	1	0	1	1	1	1	0	
8	1						0	1	0	0	0	1	1	0	
9	1						1	1	0	1	1	1	1	0	
10	1				1		1	1	0	1	1	1	1	1	1
11	1			1	1		0	1	1	1	1				
12	1		1				0	1	1	1	1	0		0	
13	1			1		1	0	1	1	1	1	0		0	
14	1		1				1	1	1	1	1	0		0	
15	1				1		0	1	1	1	1	1	1	0	
16							0	1	0	1	0	0		0	
17	1	1			1	1	1	1	1	1	1	1	1	0	

Appendix H

Demographics

Figure 1.

Demographic Recode Data Excel Spreadsheet: recode data to better assist mean calculations



Q15	Q17	17_Male	7_Fema	Q18	18_Age	8_AgeR	_AgeGrc	Q19	9_Organ	Gluten-F	_Sugar-f	9_Vega	_Vegeta	9_Koshe	9_NutA	_Lact	9_NoDr	Q20	Q20_Sir	Q20_Sl	Q20_M	Q20_W	Q20_Se	_MSOth
2	2	0	1	32	30	3	32	9	0	0	0	0	0	0	0	0	0	3	0	0	1	0	0	0
1	2	0	1	25	23	2	27	2,7,8	0	1	0	0	0	0	1	1	0	1	1	0	0	0	0	0
1	2	0	1	25	23	2	27	9	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0
1	2	0	1	20	18	1	22	9	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0
2	2	0	1	24	22	1	22	9	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0
1	2	0	1	52	50	7	52	9	0	0	0	0	0	0	0	0	1	2	0	1	0	0	0	0
1	2	0	1	46	44	6	47	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0
1	2	0	1	22	20	1	22	9	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0
1	1	1	0	26	24	2	27	8	0	0	0	0	0	0	0	1	0	1	1	0	0	0	0	0
2	1	1	0	63	61	9	60	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0
1	2	0	1	56	54	7	52	2	0	1	0	0	0	0	0	0	0	3	0	0	1	0	0	0
2	2	0	1	24	22	1	22	9	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0
2	2	0	1	32	30	3	32	9	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0
2	2	0	1	51	49	6	47	2	0	1	0	0	0	0	0	0	0	2	0	1	0	0	0	0
2	1	1	0	51	49	6	47	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0
2	2	0	1	56	54	7	52	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0
1	1	1	0	52	50	7	52	9	0	0	0	0	0	0	0	0	1	2	0	1	0	0	0	0
2	2	0	1	57	55	8	57	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0
1	1	1	0	23	21	1	22	8	0	0	0	0	0	0	0	1	0	6	0	0	0	0	0	1
1	2	0	1	31	29	2	27	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0
2	2	0	1	61	59	8	57	9	0	0	0	0	0	0	0	0	1	3	0	0	1	0	0	0

Figure 2.

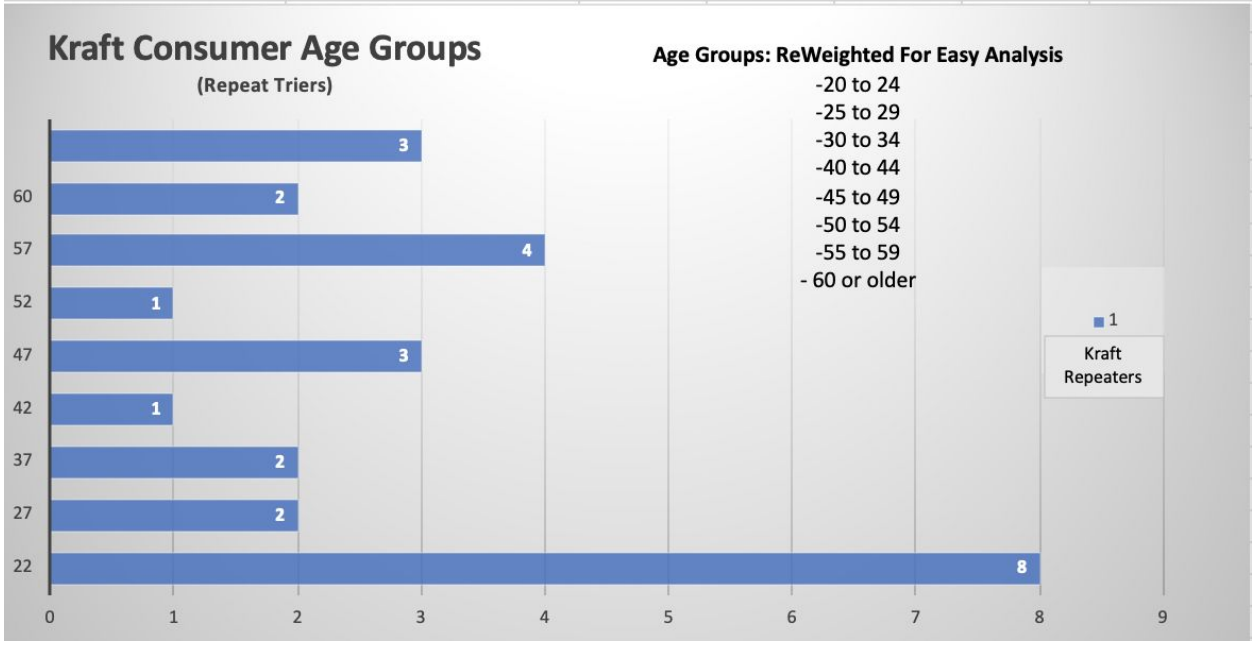
Demographic Excel Pivot: Average response rate calculated for all demographic questions

	Values	Total
4	Average of Q17_MaleCode	26%
5	Average of Q17_FemaleCode	72%
6	Average of Q18_AgeGroupCode	36.55
7	Average of Q19_OrganicCode	4%
8	Average of Q19_Gluten-FreeCode	10%
9	Average of Q19_Sugar-freeCode	3%
0	Average of Q19_VeganCode	1%
1	Average of Q19_VegetarianCode	3%
2	Average of Q19_KosherCode	0%
3	Average of Q19_NutAllergy	3%
4	Average of Q19_LactoseCode	9%
5	Average of Q19_NoDRCode	76%
6	Average of Q20_Single/NeverMarriedCode	45%
7	Average of Q20_Single/DivorcedCode	13%
8	Average of Q20_MarriedCose	38%
9	Average of Q20_WidowedCode	0%
0	Average of Q20_SeparatedCode	0%
1	Average of Q20_MSOtherCode	4%
2	Average of Q21_HouseH1Code	30%
3	Average of Q21_HouseH2-4Code	58%
4	Average of Q21_HouseH5-7Code	12%
5	Average of Q21_HouseH8+Code	0%
6	Average of Q22_ChildrenCode	33%
7	Average of Q23_CAge1-5Code	7%
8	Average of Q23_CAge6-11Code	6%
9	Average of Q23_CAge12-17Code	19%
0	Average of Q23_CAge18+Code	19%
1	Average of Q23_CAgeNoChildLiveHHCode	55%
2	Average of Q24_EducationCode	1%
3	Average of Q25_Race/EthnicityCode	96%

Figure 3.

Demographic Excel Spreadsheet Pivot and Graph; table depicts number of Kraft Triers, based on age group.

Count of ResponseId	KraftSingles-Repeater	
Q18_AgeGroupCode	1	Grand Total
22	8	8
27	2	2
37	2	2
42	1	1
47	3	3
52	1	1
57	4	4
60	2	2
	3	3
Grand Total	**26**	**26**



Appendix I

Consumption Data

Figure 1.

Consumption over the past 30 days Spreadsheet; data was recorded to better assist SPSS mean calculations.

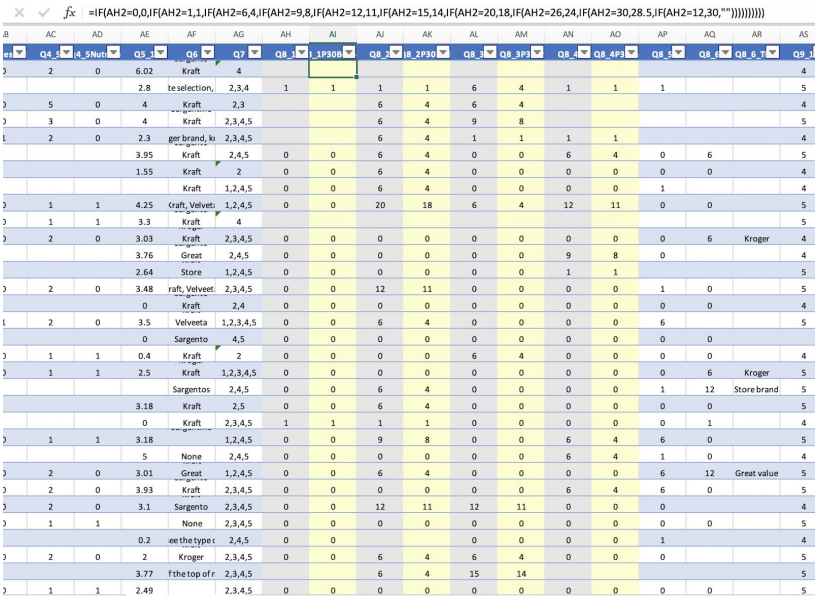
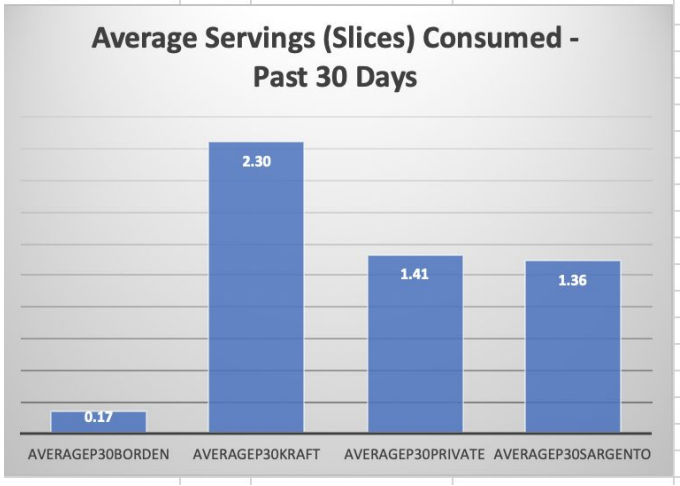


Figure 2.

Triers and Repeaters Excel Pivot Table and Graphic; Averages of responses based on brand .

ResponseId	(All)
Values	**Total**
AverageP30Borden	0.17
AverageP30Kraft	2.30
AverageP30Private	1.41
AverageP30Sargento	1.36

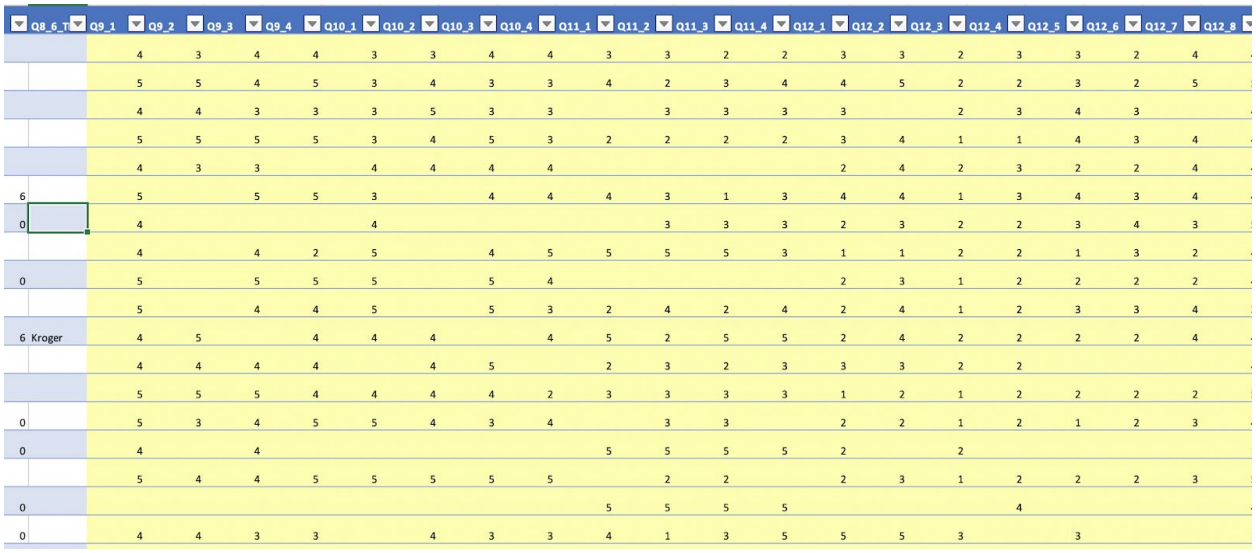


Appendix J

Attributes Data

Figure 1.

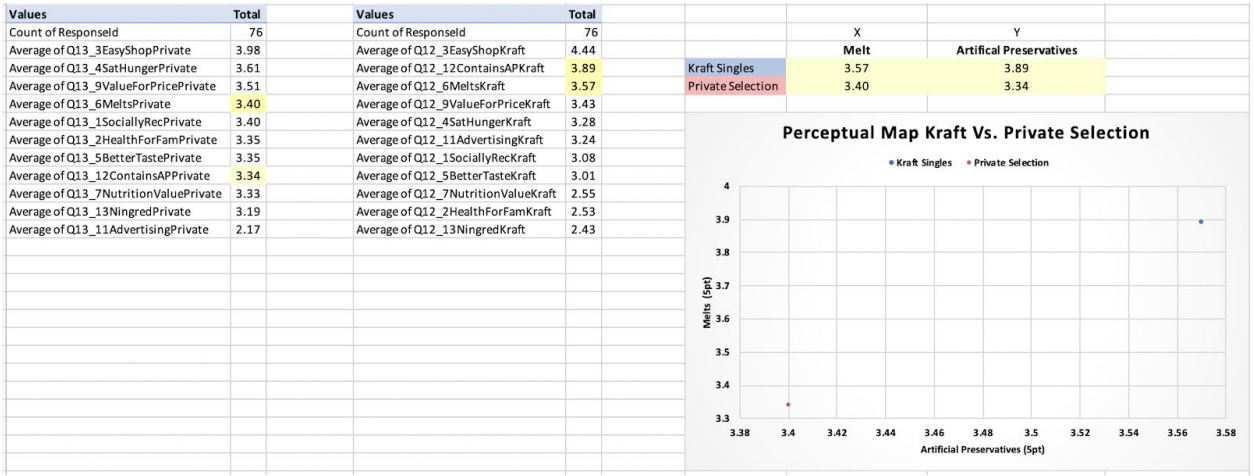
Removing 6's and 7's Excel Spreadsheet; Find and replace 6's and 7's data. To not account for respondents who answered "I am not sure" and " I have not used this brand before".



Q8_6_T	Q9_1	Q9_2	Q9_3	Q9_4	Q10_1	Q10_2	Q10_3	Q10_4	Q11_1	Q11_2	Q11_3	Q11_4	Q12_1	Q12_2	Q12_3	Q12_4	Q12_5	Q12_6	Q12_7	Q12_8
	4	3	4	4	3	3	4	4	3	3	2	2	3	3	2	3	3	2	4	
	5	5	4	5	3	4	3	3	4	2	3	4	4	5	2	2	3	2	5	
	4	4	3	3	3	5	3	3		3	3	3	3		2	3	4	3		
	5	5	5	5	3	4	5	3	2	2	2	2	3	4	1	1	4	3	4	
	4	3	3		4	4	4	4					2	4	2	3	2	2	4	
6	5		5	5	3		4	4	4	3	1	3	4	4	1	3	4	3	4	
0	4				4					3	3	3	2	3	2	2	3	4	3	
	4		4	2	5		4	5	5	5	5	3	1	1	2	2	1	3	2	
0	5		5	5	5		5	4					2	3	1	2	2	2	2	
	5		4	4	5		5	3	2	4	2	4	2	4	1	2	3	3	4	
6 Kroger	4	5		4	4	4		4	5	2	5	5	2	4	2	2	2	2	4	
	4	4	4	4		4	5		2	3	2	3	3	3	2	2				
	5	5	5	4	4	4	4	2	3	3	3	3	1	2	1	2	2	2	2	
0	5	3	4	5	5	4	3	4		3	3		2	2	1	2	1	2	3	
0	4		4						5	5	5	5	2		2					
	5	4	4	5	5	5	5	5		2	2		2	3	1	2	2	2	3	
0									5	5	5	5				4				
0	4	4	3	3		4	3	3	4	1	3	5	5	5	3		3			

Figure 2.

Excel Spreadsheet Pivot and Perceptual Map; Averages of Culinary usage and Artificial Preservatives



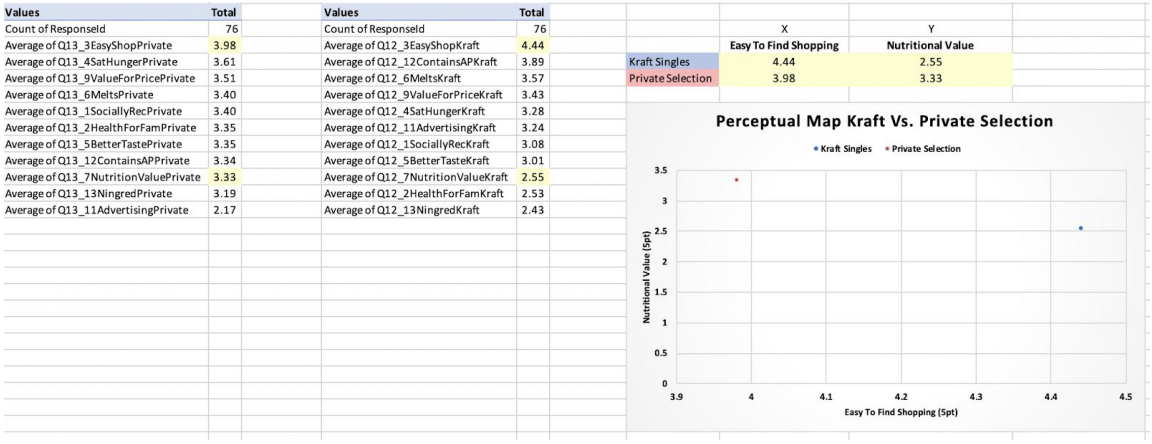
Values	Total
Count of ResponseId	76
Average of Q13_3EasyShopPrivate	3.98
Average of Q13_4SatHungerPrivate	3.61
Average of Q13_9ValueForPricePrivate	3.51
Average of Q13_6MeltsPrivate	3.40
Average of Q13_1SociallyRecPrivate	3.40
Average of Q13_2HealthForFamPrivate	3.35
Average of Q13_5BetterTastePrivate	3.35
Average of Q13_12ContainsAPPrivate	3.34
Average of Q13_7NutritionValuePrivate	3.33
Average of Q13_13NingredPrivate	3.19
Average of Q13_11AdvertisingPrivate	2.17

Values	Total
Count of ResponseId	76
Average of Q12_3EasyShopKraft	4.44
Average of Q12_12ContainsAPKraft	3.89
Average of Q12_6MeltsKraft	3.57
Average of Q12_9ValueForPriceKraft	3.43
Average of Q12_4SatHungerKraft	3.28
Average of Q12_11AdvertisingKraft	3.24
Average of Q12_1SociallyRecKraft	3.08
Average of Q12_5BetterTasteKraft	3.01
Average of Q12_7NutritionValueKraft	2.55
Average of Q12_2HealthForFamKraft	2.53
Average of Q12_13NingredKraft	2.43

	X	Y
	Melt	Artifical Preservatives
Kraft Singles	3.57	3.89
Private Selection	3.40	3.34

Figure 3.

Excel Spreadsheet Pivot and Perceptual Map; Averages of Nutritional Value and Easy to Find when shopping



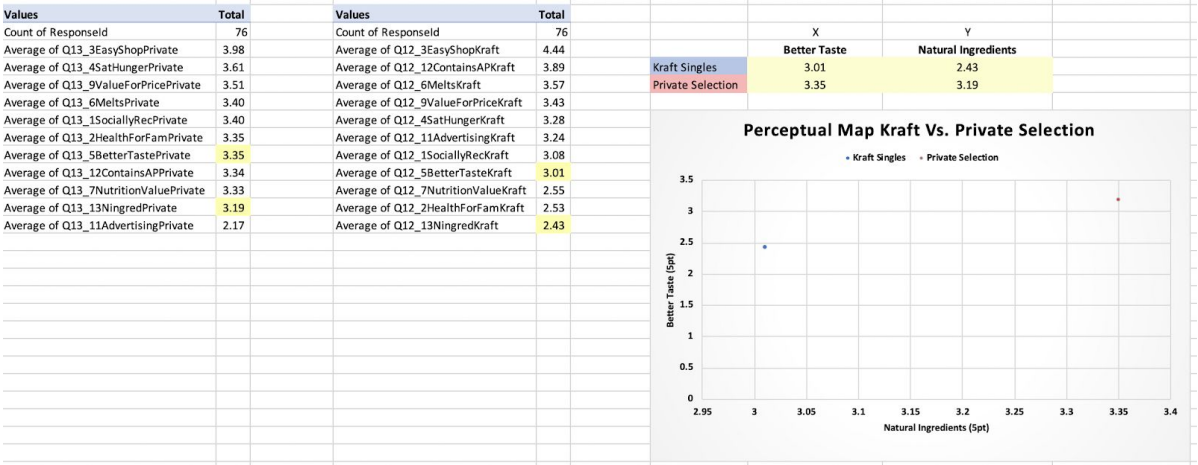
Values	Total
Count of ResponseId	76
Average of Q13_3EasyShopPrivate	3.98
Average of Q13_4SatHungerPrivate	3.61
Average of Q13_9ValueForPricePrivate	3.51
Average of Q13_6MeltsPrivate	3.40
Average of Q13_1SociallyRecPrivate	3.40
Average of Q13_2HealthForFamPrivate	3.35
Average of Q13_5BetterTastePrivate	3.35
Average of Q13_12ContainsAPPrivate	3.34
Average of Q13_7NutritionValuePrivate	3.33
Average of Q13_13NingredPrivate	3.19
Average of Q13_11AdvertisingPrivate	2.17

Values	Total
Count of ResponseId	76
Average of Q12_3EasyShopKraft	4.44
Average of Q12_12ContainsAPKraft	3.89
Average of Q12_6MeltsKraft	3.57
Average of Q12_9ValueForPriceKraft	3.43
Average of Q12_4SatHungerKraft	3.28
Average of Q12_11AdvertisingKraft	3.24
Average of Q12_1SociallyRecKraft	3.08
Average of Q12_5BetterTasteKraft	3.01
Average of Q12_7NutritionValueKraft	2.55
Average of Q12_2HealthForFamKraft	2.53
Average of Q12_13NingredKraft	2.43

	X	Y
	Easy To Find Shopping	Nutritional Value
Kraft Singles	4.44	2.55
Private Selection	3.98	3.33

Figure 4.

Excel Spreadsheet Pivot and Perceptual Map; Averages of Better Taste and Natural Ingredients



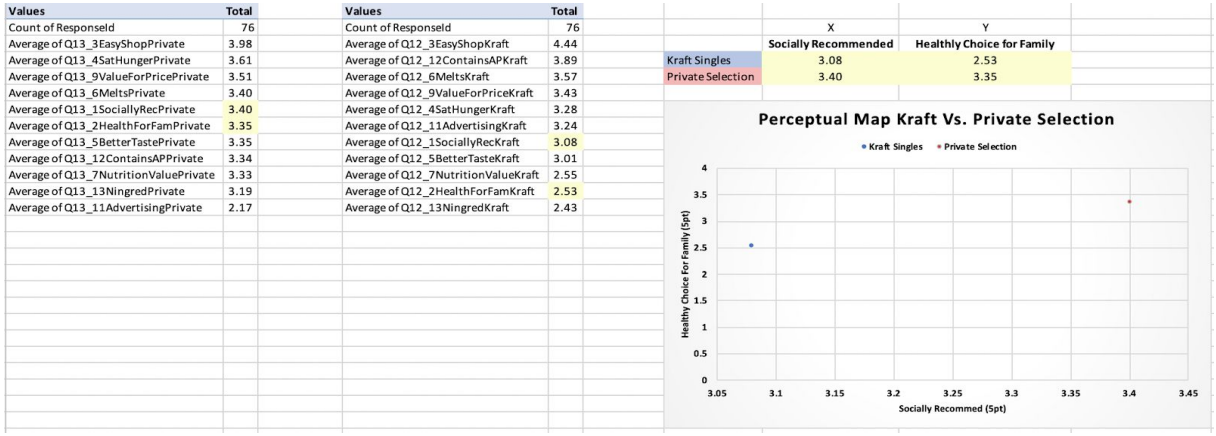
Values	Total
Count of ResponseId	76
Average of Q13_3EasyShopPrivate	3.98
Average of Q13_4SatHungerPrivate	3.61
Average of Q13_9ValueForPricePrivate	3.51
Average of Q13_6MeltsPrivate	3.40
Average of Q13_1SociallyRecPrivate	3.40
Average of Q13_2HealthForFamPrivate	3.35
Average of Q13_5BetterTastePrivate	3.35
Average of Q13_12ContainsAPPrivate	3.34
Average of Q13_7NutritionValuePrivate	3.33
Average of Q13_13NingredPrivate	3.19
Average of Q13_11AdvertisingPrivate	2.17

Values	Total
Count of ResponseId	76
Average of Q12_3EasyShopKraft	4.44
Average of Q12_12ContainsAPKraft	3.89
Average of Q12_6MeltsKraft	3.57
Average of Q12_9ValueForPriceKraft	3.43
Average of Q12_4SatHungerKraft	3.28
Average of Q12_11AdvertisingKraft	3.24
Average of Q12_1SociallyRecKraft	3.08
Average of Q12_5BetterTasteKraft	3.01
Average of Q12_7NutritionValueKraft	2.55
Average of Q12_2HealthForFamKraft	2.53
Average of Q12_13NingredKraft	2.43

	X	Y
	Better Taste	Natural Ingredients
Kraft Singles	3.01	2.43
Private Selection	3.35	3.19

Figure 5.

Excel Spreadsheet Pivot and Perceptual Map; Averages of Healthy Choice for Family and Friends and Social Recommend



Values	Total
Count of ResponseId	76
Average of Q13_3EasyShopPrivate	3.98
Average of Q13_4SatHungerPrivate	3.61
Average of Q13_9ValueForPricePrivate	3.51
Average of Q13_6MeltsPrivate	3.40
Average of Q13_1SociallyRecPrivate	3.40
Average of Q13_2HealthForFamPrivate	3.35
Average of Q13_5BetterTastePrivate	3.35
Average of Q13_12ContainsAPPrivate	3.34
Average of Q13_7NutritionValuePrivate	3.33
Average of Q13_13NingredPrivate	3.19
Average of Q13_11AdvertisingPrivate	2.17

Values	Total
Count of ResponseId	76
Average of Q12_3EasyShopKraft	4.44
Average of Q12_12ContainsAPKraft	3.89
Average of Q12_6MeltsKraft	3.57
Average of Q12_9ValueForPriceKraft	3.43
Average of Q12_4SatHungerKraft	3.28
Average of Q12_11AdvertisingKraft	3.24
Average of Q12_1SociallyRecKraft	3.08
Average of Q12_5BetterTasteKraft	3.01
Average of Q12_7NutritionValueKraft	2.55
Average of Q12_2HealthForFamKraft	2.53
Average of Q12_13NingredKraft	2.43

	X	Y
	Socially Recommended	Healthly Choice for Family
Kraft Singles	3.08	2.53
Private Selection	3.40	3.35

Figure 6.

Attributes Measures Excel Spreadsheet Pivot; Averages of Kraft Satisfaction, Age Group, Nutritional Value and Contains Natural Ingredients by Kraft Triers

	KraftSingle-Trier		
Values	**0**	**1**	**Grand Total**
Count of ResponseId	39	30	69
Average of Q10_1SatisfactionKraft	3.5	4.3	3.9
Average of Q18_AgeGroupCode	34.7	37.6	36.0
Average of Q12_7NutritionValueKraft	2.5	2.8	2.7
Average of Q12_13NingredKraft	2.5	2.5	2.5

Figure 7.

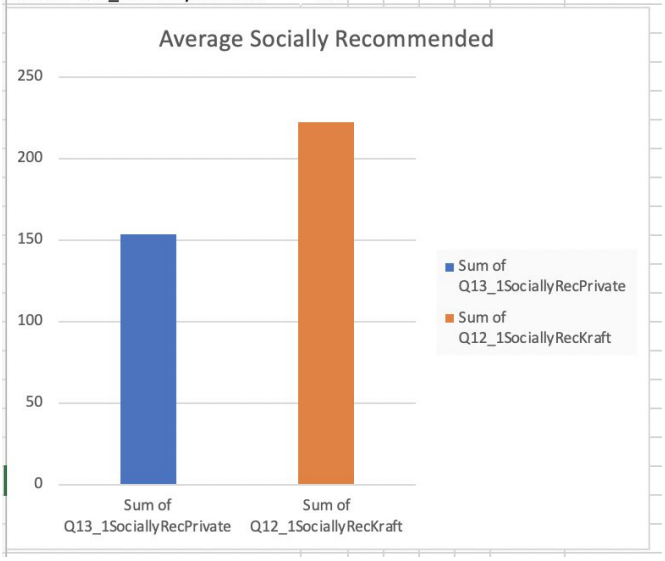
Attributes Measures Excel Spreadsheet Pivot; Averages of Kraft Satisfaction, Age Group, Nutritional Value and Health in Mind by Kraft Triers

	KraftSingle-Trier		
Values	**0**	**1**	**Grand Total**
Count of ResponseId	39	30	69
Average of Q10_1SatisfactionKraft	3.5	4.3	3.9
Average of Q18_AgeGroupCode	34.7	37.6	36.0
Average of Q12_7NutritionValueKraft	2.5	2.8	2.7
Average of Q14_6HealthMindKraft	2.77	3.69	3.16

Figure 8.

Attributes Measures Excel Spreadsheet Pivot and Graph; Averages of Social Recommendation Kraft vs Private Selection.

Values	
Sum of Q13_1SociallyRecPrivate	153
Sum of Q12_1SociallyRecKraft	222



Appendix K

SPSS Runs

Figure 1.

SPSS Test Table Result; Private Selection Attribute Measures

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q13_3EasyShopPrivate	51	1	5	3.98	.812
Q13_4SatHungerPrivate	46	1	5	3.61	.714
Q13_9ValueForPricePrivate	45	2	5	3.51	.661
Q13_6MeltsPrivate	42	2	5	3.40	.798
Q13_1SociallyRecPrivate	45	2	5	3.40	.837
Q13_5BetterTastePrivate	46	1	5	3.35	.795
Q13_2HealthForFamPrivate	46	1	4	3.35	.766
Q13_12ContainsAPPrivate	29	2	5	3.34	.936
Q13_7NutritionValuePrivate	48	1	4	3.33	.753
Q13_13NingredPrivate	36	1	4	3.19	.786
Q13_11AdvertisingPrivate	48	1	4	2.17	.907
Valid N (listwise)	25				

Figure 2.

SPSS Test Table Result; Kraft Attribute Measures

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Q12_3EasyShopKraft	72	3	5	4.44	.603
Q12_12ContainsAPKraft	57	1	5	3.89	.920
Q12_6MeltsKraft	65	1	5	3.57	.935
Q12_9ValueForPriceKraft	65	1	4	3.43	.770
Q12_4SatHungerKraft	69	1	5	3.28	1.136
Q12_11AdvertisingKraft	66	1	5	3.24	1.096
Q12_1SociallyRecKraft	72	1	5	3.08	1.230
Q12_5BetterTasteKraft	69	1	5	3.01	1.144
Q12_7NutritionValueKraft	66	1	4	2.55	1.026
Q12_2HealthForFamKraft	70	1	5	2.53	.974
Q12_13NingredKraft	58	1	5	2.43	1.028
Valid N (listwise)	41				

Figure 3.
SPSS Test Table Result; Kraft vs Private Selection Awareness

Paired Samples Statistics

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	AKraft	.97	76	.161	.018
	APrivate Selection	.86	76	.354	.041

Paired Samples Correlations

		N	Correlation	Sig.
Pair 1	AKraft & APrivate Selection	76	.166	.152

Paired Samples Test

		Paired Differences					t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference Lower	Upper			
Pair 1	AKraft - APrivate Selection	.118	.364	.042	.035	.202	2.837	75	.006

Figure 4.
SPSS Test Table Result; Kraft vs Private Selection Advertisement Product Description "Health in Mind…" and Likely to Buy.

Paired Samples Statistics

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	Q14_6HealthMindKraft	3.18	66	1.108	.136
	Q14_4HealthMindPrivate	3.58	66	1.009	.124

Paired Samples Correlations

		N	Correlation	Sig.
Pair 1	Q14_6HealthMindKraft & Q14_4HealthMindPrivate	66	.690	.000

Paired Samples Test

		Paired Differences					t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference Lower	Upper			
Pair 1	Q14_6HealthMindKraft - Q14_4HealthMindPrivate	-.394	.839	.103	-.600	-.188	-3.814	65	.000

Figure 5.

SPSS Test Table Result; Kraft vs Private Selection Contains Natural Ingredients and Likely to Buy.

T-Test

[DataSet1]

Paired Samples Statistics

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	Q12_13NingredKraft	2.34	35	1.162	.196
	Q13_13NingredPrivate	3.17	35	.785	.133

Paired Samples Correlations

		N	Correlation	Sig.
Pair 1	Q12_13NingredKraft & Q13_13NingredPrivate	35	.127	.467

Paired Samples Test

		Paired Differences					t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference Lower	Upper			
Pair 1	Q12_13NingredKraft - Q13_13NingredPrivate	-.829	1.317	.223	-1.281	-.376	-3.722	34	.001

Figure 6.
SPSS Test Table Result; Kraft vs. Private Selection Social Recommendation

T-Test

Paired Samples Statistics

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	Q12_1SociallyRecKraft	2.84	43	1.233	.188
	Q13_1SociallyRecPrivate	3.40	43	.849	.129

Paired Samples Correlations

		N	Correlation	Sig.
Pair 1	Q12_1SociallyRecKraft & Q13_1SociallyRecPrivate	43	.040	.798

Paired Samples Test

		Paired Differences					t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference Lower	Upper			
Pair 1	Q12_1SociallyRecKraft - Q13_1SociallyRecPrivate	-.558	1.469	.224	-1.010	-.106	-2.492	42	.017

Figure 7.

SPSS Test Table Result; Kraft vs. Private Selection Contains Artificial Preservatives

Paired Samples Statistics

		Mean	N	Std. Deviation	Std. Error Mean
Pair 1	Q12_12ContainsAPKraft	3.96	27	1.091	.210
	Q13_12ContainsAPPrivate	3.37	27	.967	.186

Paired Samples Correlations

		N	Correlation	Sig.
Pair 1	Q12_12ContainsAPKraft & Q13_12ContainsAPPrivate	27	.451	.018

Paired Samples Test

		Paired Differences					t	df	Sig. (2-tailed)
		Mean	Std. Deviation	Std. Error Mean	95% Confidence Interval of the Difference Lower	Upper			
Pair 1	Q12_12ContainsAPKraft - Q13_12ContainsAPPrivate	.593	1.083	.209	.164	1.021	2.842	26	.009

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