

2025 Beverage Calories Initiative:

Report on 2017 Progress toward the Community Calorie Goal

COMMUNITY CALORIE GOAL

PREPARED FOR:

American Beverage Association
Alliance for a Healthier Generation

PREPARED BY:

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EXECUTIVE SUMMARY

In September 2014, the American Beverage Association (“ABA”), The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo, and the Alliance for a Healthier Generation (“Healthier Generation”) announced a commitment to help reduce beverage calories in the American diet. This commitment includes two key components: (1) the National Initiative, which aims to reduce liquid refreshment beverage (“LRB”) calories consumed per person nationally by 20 percent by 2025 (i.e., the national calorie goal); and (2) the Communities Initiative, which aims to achieve equivalent reductions over ten years in eight to ten select communities where the challenge is believed to be greatest (i.e., the community calorie goal). The collective effort to fulfill these commitments is called the 2025 Beverage Calories Initiative (“BCI”).

To measure progress over time, the ABA retained Keybridge as a third-party evaluator. This is the third report on progress toward the community calorie goal. A report on progress toward the national calorie goal released in August 2018 estimated that LRB calorie consumption fell by 1.5 percent in 2017 (roughly 3 calories per person per day) after being effectively flat from 2014 to 2016. The report concluded that the 2017 progress was an important step in the right direction toward the national calorie goal, but that progress needs to accelerate. Similarly, this report demonstrates notable improvements in progress towards the community calorie goal in 2017 versus earlier years. It shows that LRB calories per person declined in all five BCI Communities in 2017, whereas previous reports showed calorie growth in 2015 and 2016 in multiple communities. In summary, this report points to the following conclusions:

- (1) The pace of LRB calorie reductions per person in 2017 was faster in each of the five BCI Communities than the average annual pace needed to achieve the community calorie goal. The pace in each community also exceeded the national calorie reduction pace.**
- (2) In four of the five BCI Communities, the average annual pace of LRB calorie reductions since the baseline year was slower than the pace needed to achieve the calorie reduction goal. This was because LRB calories per person had grown in the first year of BCI implementation in those communities.**
- (3) Decreases in LRB calories per person were driven by decreases in the average number of calories per 8-ounce serving, not by decreasing volumes per person. In fact, LRB volumes per person grew from baseline year levels in all five communities, driven by growth in the per person volumes of no- and low-calorie beverages.**
- (4) Per person volumes of full- and mid-calorie beverages fell in 2017 in all five communities and since baseline in four communities. This enabled LRB calories per person to drop despite growth in overall LRB volumes.**
- (5) Longer time horizons are needed to demonstrate whether the decreases in the LRB calories per person seen in 2017 represent the beginnings of lasting trends toward the Community Calorie Goal.**

I. INTRODUCTION

In September 2014, the American Beverage Association (“ABA”), The Coca-Cola Company, Dr Pepper Snapple Group (now Keurig Dr Pepper), PepsiCo, and the Alliance for a Healthier Generation (“Healthier Generation”) announced a commitment to help reduce beverage calories in the American diet. This commitment includes two key components: (1) the National Initiative, which aims to reduce liquid refreshment beverage (“LRB”) calories consumed per person nationally by 20 percent by 2025 (i.e., the national calorie goal); and (2) the Communities Initiative, which aims to achieve equivalent reductions over ten years in eight to ten select communities where the challenge is believed to be greatest (i.e., the community calorie goal). The Communities Initiative also aims to identify calorie reduction strategies that can be applied more broadly to help achieve beverage calorie reductions nationally. The collective effort to fulfill these commitments is called the 2025 Beverage Calories Initiative (“BCI”).

Since 2014, five communities have been selected for participation in the Communities Initiative. The first two BCI Communities, which include specific neighborhoods in Little Rock, AR and Eastern Los Angeles, CA, were announced at the signing of this commitment in September 2014. The next BCI Community, which includes the South Bronx and Brooklyn’s Bedford-Stuyvesant and Crown Heights neighborhoods in New York City, was announced in May 2015. Finally, two counties in Alabama (Montgomery and Lowndes) and four counties in the Delta area of Northwest Mississippi (Coahoma, Panola, Quitman, and Tunica) were announced in April 2016. Due to differences in when these communities were selected and when implementation began, progress is measured against different baseline years. As shown in Figure 1, 2014 is the baseline year for the Eastern L.A. and Little Rock BCI Communities, while 2015 is the baseline year for the other three BCI Communities.

Figure 1
Community Baseline & Implementation Years

BCI Community	2014	2015	2016	2017
Eastern L.A.	Baseline	Year 1	Year 2	Year 3
Little Rock	Baseline	Year 1	Year 2	Year 3
Montgomery-Lowndes	-	Baseline	Year 1	Year 2
Mississippi Delta	-	Baseline	Year 1	Year 2
Bronx-Brooklyn	-	Baseline	Year 1	Year 2

The five BCI Communities have diverse geographies and demographics, but share key socioeconomic characteristics, which contributed to their selection. All five communities have higher poverty rates and lower median incomes than the national average. Additionally, proprietary data from The Coca-Cola Company, Keurig Dr Pepper, and PepsiCo (“the BCI Companies”) show that reduced-calorie beverages represent a smaller share of sales in those communities than they do nationally.¹

Commitment signatories also agreed to independent, third-party monitoring of progress over time. In consultation with Healthier Generation, the ABA held a competitive request-for-proposal process and selected Keybridge to measure and monitor progress. Each year, progress toward the national and community calorie goals is reported publicly. This report features 2017 progress toward the community calorie goal. (Previous reports are available at healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative. In addition to

¹ A more detailed description of each community can be found in the Baseline Communities Initiative report, available at healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

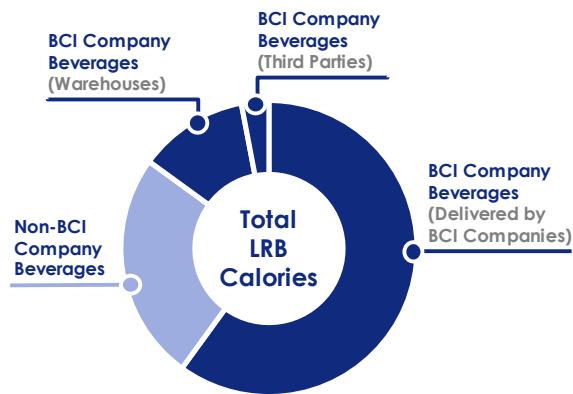
earlier calorie consumption estimates, more detailed information about the calorie reduction strategies being implemented is available in previous progress reports and in downloadable summaries from each company available at the above link.)

II. METHODOLOGY SUMMARY

Measuring calories per person at the community level presents additional challenges and greater uncertainties compared to measurement at the national level. The main challenge is that there are no existing datasets that report beverage volumes for the specific BCI Communities. Therefore, multiple custom datasets were used – and will continue to be used – to estimate LRB volumes at the community level. These datasets include BCI Company beverage volume data, custom Scantrack data, company customer lists, and Dun & Bradstreet store lists.

The various datasets and differing methodologies were used to estimate total LRB calories for each of the following four sources of beverage calories: (1) BCI Company-delivered beverages, (2) Non-BCI Company beverages, (3) BCI Company beverages delivered through warehouses, and (4) BCI Company beverages sourced from third parties. The methodologies used to estimate beverage calories from each source are included in the accompanying detailed methodology document. Figure 2 shows the average share of calories estimated to come from each of these sources among the five communities. Calories from each source were summed and divided by local population estimates to estimate calories per person.

Figure 2
Sources of Total LRB Calories in BCI Communities
Share of Total LRB Calories: BCI vs. Non-BCI Company Beverages



Sources: BCI Company-Reported Volumes & Nielsen Scantrack

There are many uncertainties related to measuring LRB calories per person in narrow geographies, which increase the margins of error in comparison to the national estimates. These include, but are not limited to, the impact of commuters, store openings and closings, and a reliance on smaller, less representative samples (as compared to national) to estimate the volumes of some beverages and annual population changes.² As the initiative continues, and progress is measured over longer periods of time, there will be a higher degree of certainty regarding changes in LRB calories per person at the community level.

Calorie estimates for 2014-2016 have been updated from previously published estimates. The differences reflected in these updates are mostly due to revisions of beverage sales volume data, but some are due to slight revisions in the methodology. More details about the methodology, revisions to the methodology, and key uncertainties are discussed in a detailed methodology

² These uncertainties are discussed at length in the accompanying detailed methodology document available at healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

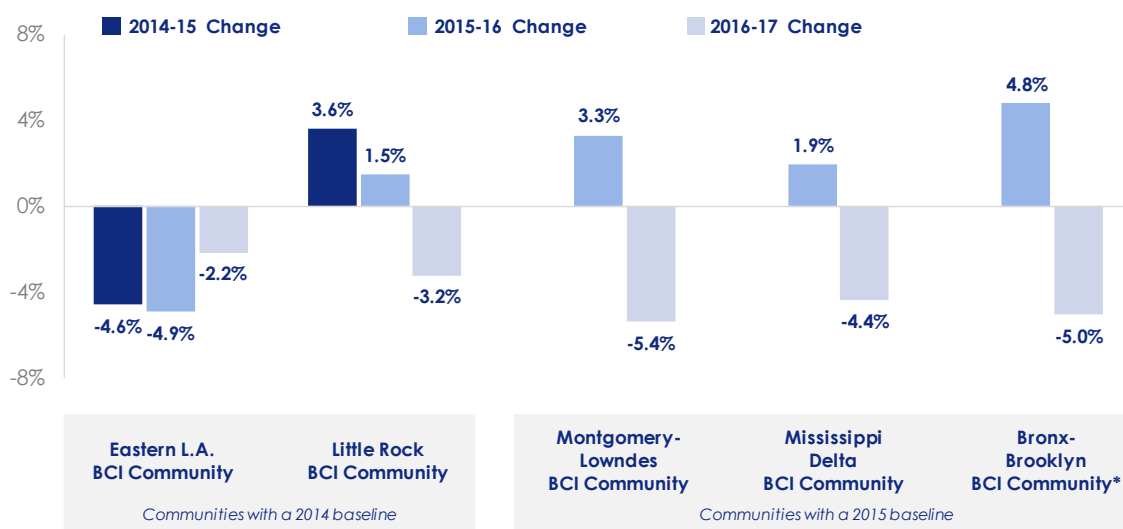
document available at healthiergeneration.org/our-work/businesses/impact/beverage-calories-initiative.

III. RESULTS: PROGRESS TOWARD THE COMMUNITY CALORIE GOAL

3.1 Overall Progress

The primary measure of progress for the community calorie goal is the change in beverage calories per person per day. In a notable change from 2016, LRB calories per person per day declined in all five BCI Communities in 2017. This data is similar to the national finding that the strongest progress to date occurred in 2017. As shown in Figure 3, these LRB calorie reductions occurred after increases in four of the five BCI Communities in the preceding years.

Figure 3
Change in Calories Per Person Per Day
 Total LRB, Percent Change from 2014 to 2015, 2015 to 2016, and 2016 to 2017 by BCI Community

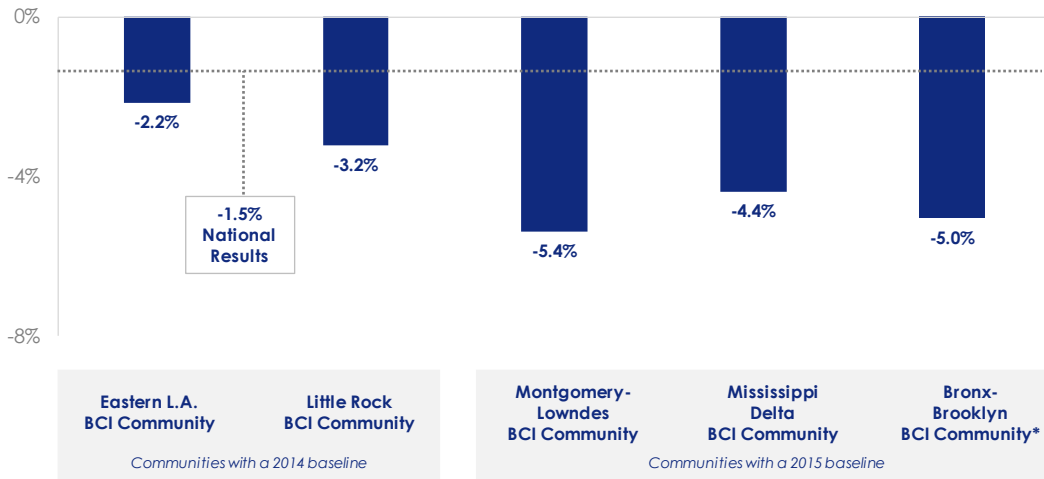


Sources: BCI Company-Reported Volumes & Nielsen Scantrack
 * Uncertainty is higher in the Bronx-Brooklyn BCI Community due to data limitations (See Detailed Methodology).

Change in 2017 (2016-2017)

LRB calories per person per day declined in all five BCI Communities between 2016 and 2017. The declines ranged from 2.2 to 5.4 percent decreases, as shown in Figure 4. These reductions exceeded the average annual pace needed to achieve the calorie goal in each community and they exceeded the reduction achieved nationally.

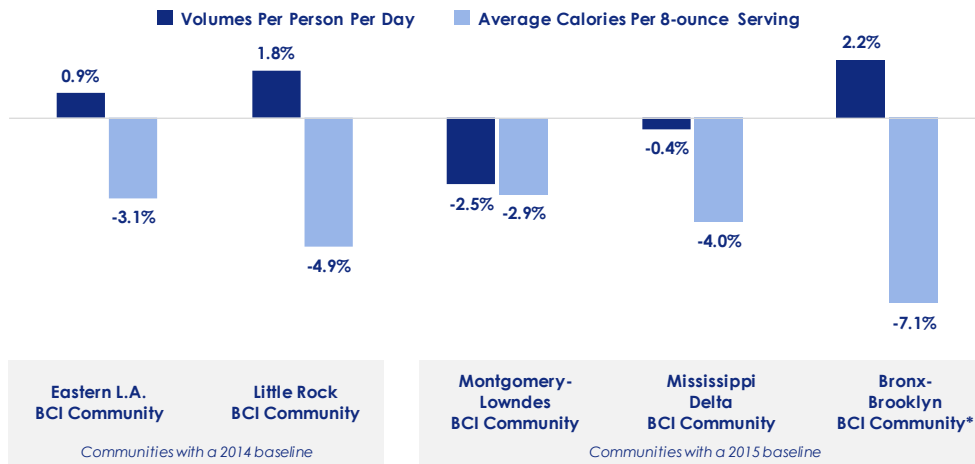
Figure 4
Change in Calories Per Person Per Day
 Total LRB, Percent Change from 2016 to 2017 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack
 * Uncertainty is higher in the Bronx-Brooklyn BCI Community due to data limitations (See Detailed Methodology).

The decreases in calories across the five BCI Communities in 2017 were not generally driven by reduced sales of LRB volumes. In fact, as Figure 5 illustrates, volumes per person grew in three BCI Communities in 2017, stayed essentially flat in another, and decreased in only one community. Instead, reductions in LRB calories per person were driven primarily by reductions in calories per 8-ounce serving. As Figure 5 shows, LRB calories per 8-ounce serving decreased consistently and significantly in all five communities in 2017, ranging from 2.9 to 7.1 percent declines. Those decreases were driven by per person volume growth of no- and low-calorie beverages and reductions of full- and mid-calorie beverages. Results from specific communities are discussed in Section 3.2.

Figure 5
Change in Volumes Per Person Per Day & Average Calories Per 8-ounce Serving
 Total LRB, Percent Change from 2016 to 2017 by BCI Community

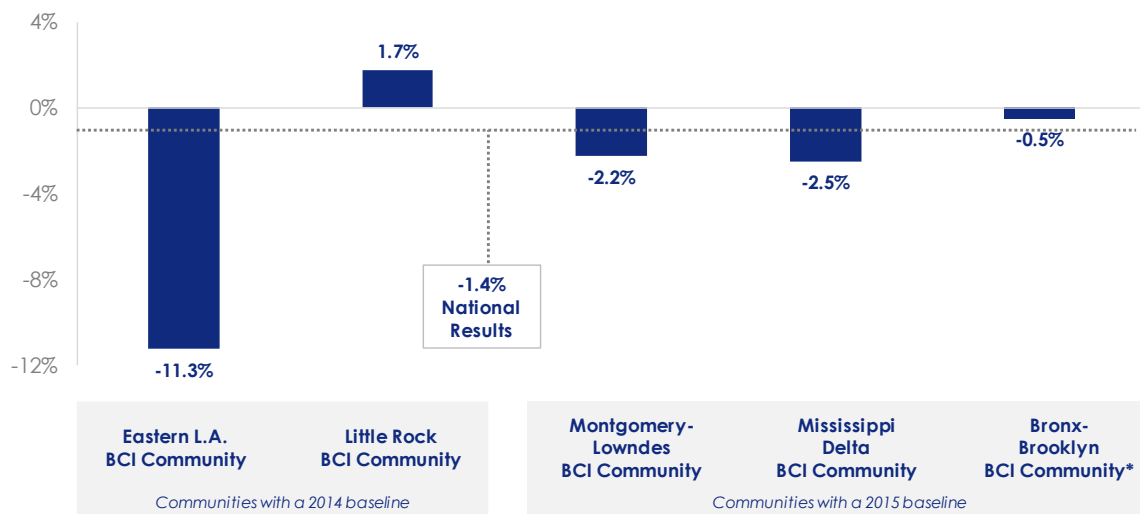


Sources: BCI Company-Reported Volumes & Nielsen Scantrack
 * Uncertainty is higher in the Bronx-Brooklyn BCI Community due to data limitations (See Detailed Methodology).

Change since Baseline (2014-2017 or 2015-2017)

Due to varied start dates, 2017 represents the second year of the initiative's implementation in three BCI Communities (Montgomery-Lowndes, Mississippi Delta, and Bronx-Brooklyn) and the third year in two BCI Communities (Eastern L.A. and Little Rock). As seen in Figure 6, LRB calories per person per day decreased since the baseline years in four of five BCI Communities. The reductions achieved in the Eastern L.A. BCI Community have been the largest, exceeding the average annual pace needed to achieve the community calorie goal in each of the first three years of implementation. The Little Rock BCI Community was the only community where 2017 LRB calories per person still exceeded the estimated level in the baseline year. In that community, the 3.2 percent reduction achieved in 2017 is enough, if maintained, to achieve the calorie goal, but not enough to offset the cumulative calorie growth seen in 2015 and 2016.

Figure 6
Change in Calories Per Person Per Day
Total LRB, Percent Change from Baseline to 2017 by BCI Community

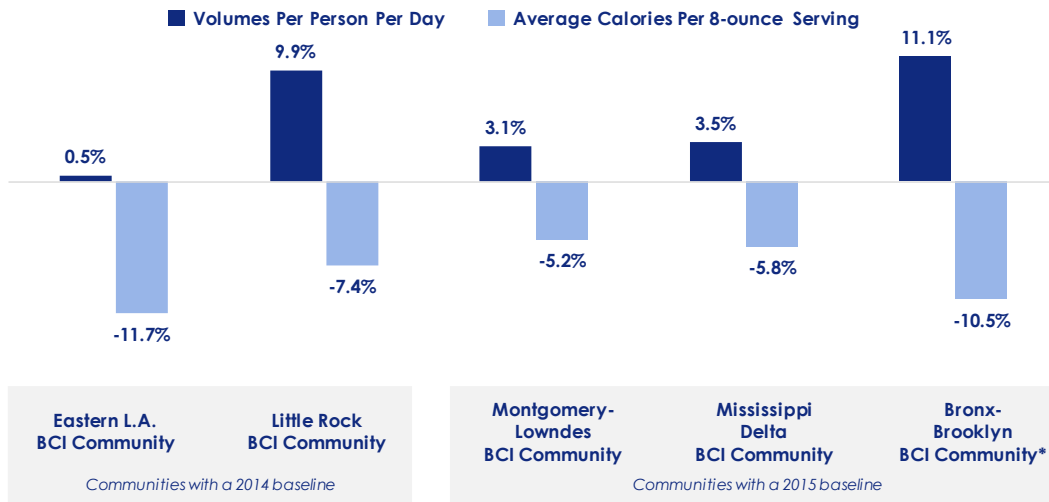


Sources: BCI Company-Reported Volumes & Nielsen Scantrack

* Uncertainty is higher in the Bronx-Brooklyn BCI Community due to data limitations (See Detailed Methodology).

The calorie decreases since baseline were driven by reductions in calories per 8-ounce serving rather than reductions in volumes, as shown in Figure 7. In fact, estimated LRB volumes per person increased since the baseline year in all five communities, driven by growth in the per person volumes of no- and low-calorie beverages. Meanwhile, per person volumes of full- and mid-calorie beverages declined in the four BCI Communities where calories also declined from the baseline year (i.e., in all but the Little Rock BCI Communities). These changes in the mix of products sold in each community drove reductions of between 5.2 and 11.7 percent in LRB calories per 8-ounce serving versus baseline year levels.

Figure 7
Change in Volumes Per Person Per Day & Average Calories Per 8-ounce Serving
Total LRB, Percent Change from Baseline to 2017 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack
 * Uncertainty is higher in the Bronx-Brooklyn BCI Community due to data limitations (See Detailed Methodology).

3.2 Progress by Community

This section summarizes key results for each community and economic characteristics that explain why these geographies were selected as BCI Communities. Each set of results features the changes in LRB calories per person, LRB volumes per person, and average calories per 8-ounce serving and compares those with the national results published in the [BCI Report on 2017 Progress toward the National Calorie Goal](#). The results also show which beverage categories contributed the most toward calorie reductions and how the pace of reductions compares with the average annual pace needed to achieve the community calorie goal.

EASTERN L.A. BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2014

Community:	Lincoln Heights, El Sereno, Boyle Heights and East Los Angeles, CA
Population (2014):	286,898
Median Household Income (2014):	\$37,282 (30% below the Median U.S. Household Income)
Poverty Rate (2014):	28% vs. 16% nationally
Obesity:	Local data show that obesity rates in the selected neighborhoods are over 5 percentage points greater than the county overall.

HEADLINE RESULTS

LRB calories per person per day declined by 2.2 percent in 2017 and by 11.3 percent since baseline. Calories per person declined more sharply than they did nationally because (1) calories per 8-ounce serving declined at nearly double the national pace and (2) LRB volumes per person per day grew at 0.5 percent versus 5.6 percent nationally. The main cause of these differences was the much larger reduction in full- and mid-calorie beverage volumes in this community (-10.0 percent) versus the nation as a whole (-2.0 percent).

	2016-17		2014 Baseline-2017	
	Community	National	Community	National
Calories per Person per Day	-2.2%	-1.5%	-11.3%	-1.4%
Volumes per Person per Day	+0.9%	+1.3%	+0.5%	+5.6%
- Full- and Mid-Calorie Beverages	-1.9%	-1.5%	-10.0%	-2.0%
- No- and Low-Calorie Beverages	+4.3%	+3.9%	+15.6%	+13.1%
Calories per 8-ounce Serving	-3.1%	-2.8%	-11.7%	-6.6%

CHANGE BY BEVERAGE CATEGORY

Declines in calories from 100% juice and juice drinks made the largest contribution to per person calorie reductions since 2014, followed closely by calorie reductions from CSDs.

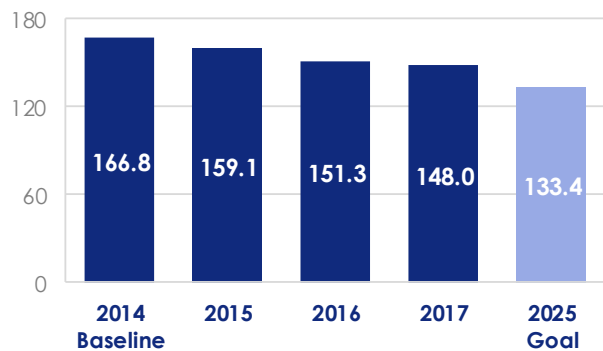
Change in Calories per Person per Day

	2016-2017	2014-2017
Carbonated Soft Drinks (CSDs)	-2.1	-7.0
100% Juice & Juice Drinks	-1.0	-10.6
Ready to Drink (RTD) Teas	-0.5	-1.7
All Other Beverages	+0.3	+0.5

PROGRESS TOWARD THE CALORIE GOAL

LRB calories per person in the Eastern L.A. BCI Community have fallen faster than the average pace needed to achieve the community calorie goal in each of the first three years of BCI implementation.

Average LRB Calories Per Person Per Day



LITTLE ROCK BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2014

Community:	ZIP Codes 72202, 72204, 72206, and 72209 in Little Rock
Population (2014):	98,277
Median Household Income (2014):	\$31,749 (41% below the Median U.S. Household Income)
Poverty Rate (2014):	27% vs. 16% nationally
Obesity:	Although obesity data are not available at a sufficiently specific geographic level, Little Rock ranks in the top 20% of metropolitan areas in the country in terms of obesity rate.

HEADLINE RESULTS

LRB calories per person decreased by 3.2 percent in 2017 while volume per person grew by 1.8 percent. The calorie decline was larger than the national rate. However, it was not large enough to offset the calorie growth in 2015 and 2016. On net, there was a 1.7 percent increase in calories per person from the 2014 baseline year to 2017. Calories per 8-ounce serving moved at about the same pace or slightly faster in this community than it did nationally. However, LRB volume per person grew well above the national rate, which explains why calorie reductions since 2014 have not kept pace.

	2016-17		2014 Baseline-2017	
	Community	National	Community	National
Calories per Person per Day	-3.2%	-1.5%	+1.7%	-1.4%
Volumes per Person per Day	+1.8%	+1.3%	+9.9%	+5.6%
- Full- and Mid-Calorie Beverages	-3.7%	-1.5%	+1.5%	-2.0%
- No- and Low-Calorie Beverages	+11.3%	+3.9%	+25.5%	+13.1%
Calories per 8-ounce Serving	-4.9%	-2.8%	-7.4%	-6.6%

CHANGE BY BEVERAGE CATEGORY

The growth in calories per person since baseline was driven primarily by 100% juice & juice drinks and CSDs. These calorie increases were offset only slightly by calorie declines from RTD teas.

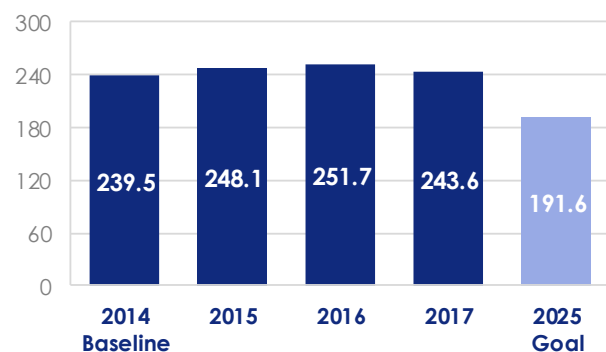
Change in Calories per Person per Day

	2016-2017	2014-2017
Carbonated Soft Drinks (CSDs)	-2.1	+2.8
100% Juice & Juice Drinks	-1.2	+3.5
Ready to Drink (RTD) Teas	-3.7	-4.0
All Other Beverages	-1.1	+1.8

PROGRESS TOWARD THE CALORIE GOAL

Per person calories are still above the baseline level in this community. However, the 3.2 percent reduction pace achieved in 2017 would be enough to meet the calorie goal if continued over the remaining commitment period.

Average LRB Calories Per Person Per Day



MONTGOMERY-LOWNDES BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2015

Community:	Lowndes and Montgomery Counties, Alabama
Population (2015):	238,964
Median Household Income (2015):	\$45,483 (16% below the Median U.S. Household Income)
Poverty Rate (2015):	23% vs. 15% nationally
Obesity:	Montgomery and Lowndes counties have a combined adult obesity rate of 34%, while Lowndes County is ranked as the 2nd most obese county in the U.S.

HEADLINE RESULTS

LRB calories per person declined by 5.4 percent in 2017, the second year and first full year of the BCI focus on this community. The reduction in 2017 more than offset per person LRB calorie growth of 3.3 percent in 2016, netting an overall decrease of 2.2 percent since the 2015 baseline. Changes in all of the key metrics – LRB calories per person, volumes per person, and calories per 8-ounce serving – are fairly consistent with the national results for the 2015-17 period, though volumes per person fluctuated somewhat and differed from the national findings when looking at individual years.

	2016-17		2015 Baseline-2017	
	Community	National	Community	National
Calories per Person per Day	-5.4%	-1.5%	-2.2%	-1.4%
Volumes per Person per Day	-2.5%	+1.3%	+3.1%	+5.6%
- Full- and Mid-Calorie Beverages	-5.5%	-1.5%	-2.7%	-1.3%
- No- and Low-Calorie Beverages	+1.3%	+3.9%	+11.0%	+8.2%
Calories per 8-ounce Serving	-2.9%	-2.8%	-5.2%	-6.6%

CHANGE BY BEVERAGE CATEGORY

Declines in calories from RTD teas made the largest contribution to per person calorie reductions since 2015, followed by calorie reductions from 100% juice and juice drinks.

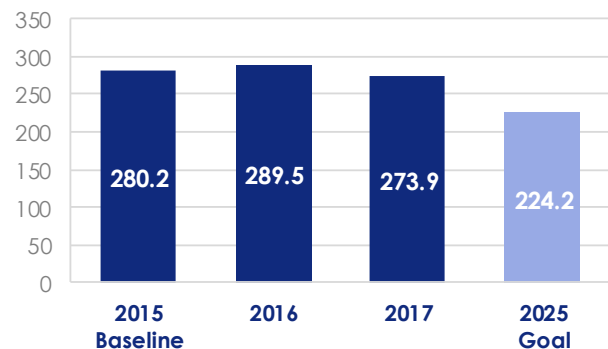
Change in Calories per Person per Day

	2016-2017	2015-2017
Carbonated Soft Drinks (CSDs)	-5.6	+0.0
100% Juice & Juice Drinks	-3.6	-0.8
Ready to Drink (RTD) Teas	-4.7	-5.4
All Other Beverages	-1.6	-0.0

PROGRESS TOWARD THE CALORIE GOAL

The pace of per person LRB calorie reductions since baseline needs to accelerate to achieve the calorie goal. The 5.4 percent reduction pace achieved in 2017, however, exceeds the average pace needed to achieve the goal.

Average LRB Calories Per Person Per Day



MISSISSIPPI DELTA BCI COMMUNITY

COMMUNITY CHARACTERISTICS



Baseline Year:
2015

Community:	Coahoma, Quitman, Panola, and Tunica Counties, Mississippi
Population (2015):	79,093
Median Household Income (2015):	\$32,198 (40% below the Median U.S. Household Income)
Poverty Rate (2015):	29% vs. 15% nationally
Obesity:	With a combined adult obesity rate of 40%, all four counties' obesity rates are in the top 15% of counties in the U.S. Three of them rank in the top 1%.

HEADLINE RESULTS

LRB calories per person declined by 4.4 percent in 2017, the second year and first full year of the BCI focus on this community. The reduction in 2017 more than offset per person LRB calorie growth of 1.9 percent in 2016, netting an overall decrease of 2.5 percent in this measure since the 2015 baseline. This decrease was slightly faster than the average decrease nationally due primarily to a slightly faster decrease in the volume of full- and mid-calorie beverages in 2015-2017.

	2016-17		2015 Baseline-2017	
	Community	National	Community	National
Calories per Person per Day	-4.4%	-1.5%	-2.5%	-1.4%
Volumes per Person per Day	-0.4%	+1.3%	+3.5%	+5.6%
- Full- and Mid-Calorie Beverages	-4.4%	-1.5%	-2.7%	-1.3%
- No- and Low-Calorie Beverages	+4.6%	+3.9%	+11.7%	+8.2%
Calories per 8-ounce Serving	-4.0%	-2.8%	-5.8%	-6.6%

CHANGE BY BEVERAGE CATEGORY

Calorie reductions from RTD tea and 100% juice and juice drinks were major drivers of overall reductions since 2015, as they more than offset slight growth in calories from other beverages.

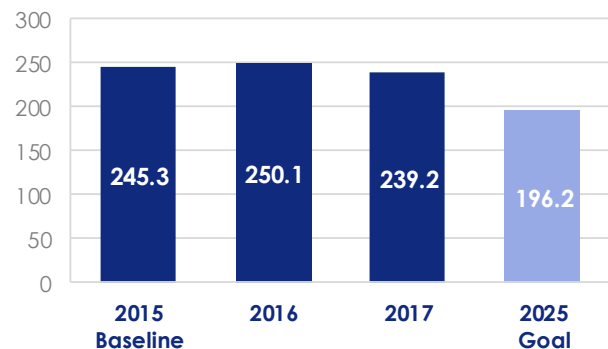
Change in Calories per Person per Day

	2016-2017	2015-2017
Carbonated Soft Drinks (CSDs)	-5.1 ↓	-0.8 ↓
100% Juice & Juice Drinks	-2.9 ↓	-2.8 ↓
Ready to Drink (RTD) Teas	-2.6 ↓	-3.7 ↓
All Other Beverages	-0.4 ↓	+1.1 ↑

PROGRESS TOWARD THE CALORIE GOAL

The pace of per person LRB calorie reductions since baseline needs to accelerate to achieve the calorie goal. The 4.4 percent reduction pace achieved in 2017, however, exceeds the average pace needed to achieve the goal.

Average LRB Calories Per Person Per Day



BRONX-BROOKLYN BCI COMMUNITY*

COMMUNITY CHARACTERISTICS



Baseline Year:
2015

Community:	South Bronx and Bedford-Stuyvesant/Crown Heights in Brooklyn, New York
Population (2015):	310,797
Median Household Income (2015):	\$37,648 (30% below the Median U.S. Household Income)
Poverty Rate (2015):	31% vs. 16% nationally
Obesity:	Local data show the selected neighborhoods in the Bronx and Brooklyn have notably higher adult obesity rates (34% and 36%) than the city average (24%).

HEADLINE RESULTS

LRB calories per person per day declined by 5.0 percent in 2017, essentially returning to the 2015 baseline year level. The primary changes in this community were the sharp increase in volumes per person and decrease in calories per 8-ounce serving, which offset one another in the first two years of BCI implementation. Both changes were driven by rapid growth of no- and low-calorie beverage volumes per person, especially water. It is important to note that there is a higher level of uncertainty with regard to estimates in this community, which is explained in the methodology document.

	2016-17		2015 Baseline-2017	
	Community	National	Community	National
Calories per Person per Day	-5.0%	-1.5%	-0.5%	-1.4%
Volumes per Person per Day	+2.2%	+1.3%	+11.1%	+5.6%
- Full- and Mid-Calorie Beverages	-4.8%	-1.5%	-0.4%	-1.3%
- No- and Low-Calorie Beverages	+7.5%	+3.9%	+20.4%	+8.2%
Calories per 8-ounce Serving	-7.1%	-2.8%	-10.5%	-6.6%

CHANGE BY BEVERAGE CATEGORY

Calories per person per day from 100% juice and juice drinks increased by 1.3, but were offset by a reduction of 1.9 calories per person per day from CSDs, resulting in a net decrease since 2015.

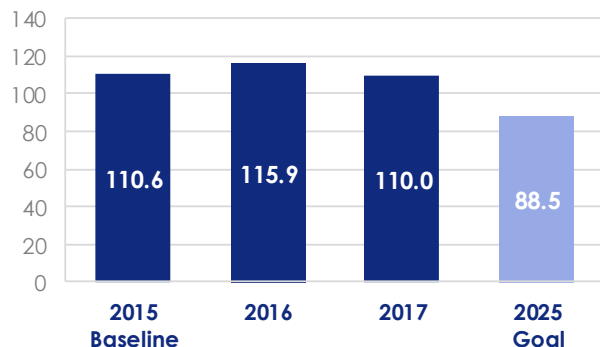
Change in Calories per Person per Day

	2016-2017	2015-2017
Carbonated Soft Drinks (CSDs)	-1.9	-1.9
100% Juice & Juice Drinks	-2.9	+1.3
Ready to Drink (RTD) Teas	-0.9	-0.3
All Other Beverages	-0.2	+0.4

PROGRESS TOWARD THE CALORIE GOAL

The pace of per person LRB calorie reductions since baseline will need to accelerate to achieve the calorie goal. The 5.0 percent pace achieved in 2017, however, exceeds the average pace needed to achieve the goal.

Average LRB Calories Per Person Per Day



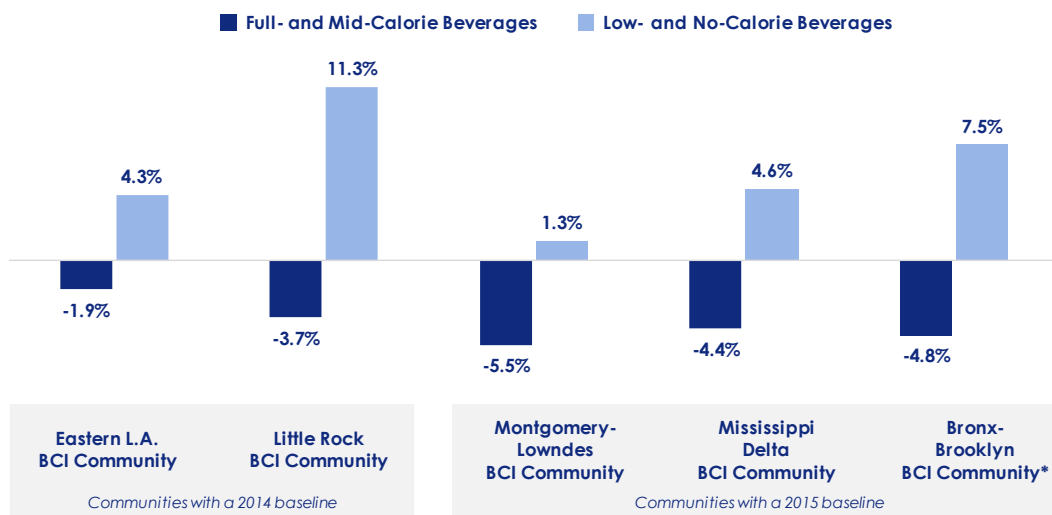
* Estimates of per person LRB calorie consumption in the Bronx-Brooklyn BCI Community are more uncertain than estimates in other markets due to data coverage limitations. More details included in the Detailed Methodology.

3.3 Common Drivers of Calorie Reduction across BCI Communities

The amount of LRB calorie reduction achieved in the five BCI Communities, and the categories that drove those reductions, varies. However, the following trends were common across the communities:

- Per person volumes of no- and low-calorie beverages grew in all five BCI Communities in 2017, as seen in Figure 8, and since the baseline years. This was driven primarily by sales of bottled water, which grew substantially in each of the communities, both in 2017 and previous years. This was also a dominant trend nationally.

Figure 8
Change in Volumes Per Person Per Day by Calorie Category
 Total LRB, Percent Change from 2016 to 2017 by BCI Community



Sources: BCI Company-Reported Volumes & Nielsen Scantrack
 * Uncertainty is higher in the Bronx-Brooklyn BCI Community due to data limitations (See Detailed Methodology).

- Per person volumes of full-calorie CSDs, full-calorie 100% juices and juice drinks, and other full-calorie beverages declined in all five BCI Communities in 2017. The categories driving the largest calorie reductions varied between communities with CSDs, 100% juices and juice drinks, and RTD teas each accounting for the largest reductions in at least one community.
- In four of the five communities, LRB calories per person grew in the first partial year of implementation. Calorie trajectories improved in each of those communities in the second year – and first full year – of BCI implementation. All four showed significant per person calorie reductions in 2017, a strong step toward achieving the community calorie goal.

IV. CONCLUSIONS

(1) The pace of LRB calorie reductions per person in 2017 was faster in each of the five BCI Communities than the average annual pace needed to achieve the community calorie goal. The pace in each community also exceeded the national calorie reduction pace.

Per person LRB calorie reductions in the five BCI Communities ranged from 2.2 to 5.4 percent in 2017. These rates exceeded the 1.5 percent reduction achieved at the national level. They are

also consistent with the finding from the [BCI Report on 2017 Progress toward the National Calorie Goal](#) that 2017 showed the strongest calorie reduction progress since the BCI was launched.

(2) In four of the five BCI Communities, the average annual pace of LRB calorie reductions since the baseline year was slower than the pace needed to achieve the calorie reduction goal. This was because LRB calories per person had grown in the first year of BCI implementation in those communities.

LRB calories per person grew in the Montgomery-Lowndes, Mississippi Delta, and Bronx-Brooklyn BCI Communities in 2016, and in Little Rock in 2015 and 2016, as BCI implementation efforts were getting underway in these geographies. In 2017, the trajectories reversed in each of those communities, an important first step in putting calories per person on the downward paths needed to reach the calorie goals.

(3) Decreases in LRB calories per person were driven by decreases in average number of calories per 8-ounce serving, not by decreasing volumes per person. In fact, LRB volumes per person grew from baseline year levels in all five communities, driven by growth in the per person volumes of no- and low-calorie beverages.

LRB volumes per person grew from the baseline year to 2017 in each of the BCI Communities. All things being equal, growth in per person volumes would tend to push calories per person up. However, the volume growth was driven by water and other no- and low-calorie beverages, which do not notably contribute to calorie consumption. The growth of these beverages also contributed to reductions in average calories per 8-ounce serving.

(4) Per person volumes of full- and mid-calorie beverages fell in 2017 in all five communities and since baseline in four communities. This enabled LRB calories per person to drop despite growth in overall LRB volumes.

Changes in per person volumes of full- and mid-calorie beverages have been the primary determinant of whether LRB calories per person increased or decreased across the communities. Like per person volumes of full- and mid-calorie beverages, LRB calories per person fell in 2017 in all communities and fell from baseline year levels in all but the Little Rock BCI Community.

(5) Longer time horizons are needed to demonstrate whether the decreases in the LRB calories per person seen in 2017 represent the beginnings of lasting trends toward the Community Calorie Goal.

The calorie reduction progress seen in 2017 represents a significant step in the direction of achieving the community calorie goal in each of the five communities. Nonetheless, these results represent a single year in a ten-year commitment and, for four communities, the results show that 2017 was the first year in which LRB calories per person declined. Achieving the community calorie goal will require multiple years of continuous calorie reductions. Additionally, there is a higher level of uncertainty and volatility around the measurement of both beverage consumption and population in smaller communities than there is at the national level. This uncertainty could notably affect the estimated changes in per person calorie consumption in a given year. Over the course of a decade, however, observed trends in beverage consumption and population growth for these communities will be more definite.

APPENDIX: SUMMARY BCI COMMUNITY DATA TABLES

EASTERN L.A. BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2014 Baseline Estimate	2016 Year 2 Estimate	2017 Year 3 Estimate	2016-17 Percent Change	2014-17 Percent Change	2014 Baseline Estimate	2016 Year 2 Estimate	2017 Year 3 Estimate	2016-17 Percent Change	2014-17 Percent Change
Total	166.8	151.3	148.0	-2.2%	-11.3%	23.7	23.6	23.8	0.9%	0.5%
Full-Calorie (>67 Calories per 8 oz.)	150.1	134.8	131.6	-2.4%	-12.3%	11.6	10.5	10.3	-2.2%	-11.5%
Mid-Calorie (41-67 Calories per 8 oz.)	15.7	15.2	15.1	-0.2%	-3.5%	2.3	2.2	2.2	-0.3%	-2.6%
Low-Calorie (5-40 Calories per 8 oz.)	0.9	1.2	1.2	-3.3%	26.4%	0.3	0.4	0.4	-0.1%	14.3%
No-Calorie (<5 calories per 8 oz.)	0.0	0.0	0.0	-4.8%	-27.1%	9.4	10.4	10.9	4.4%	15.6%
CSD	91.9	87.0	85.0	-2.4%	-7.6%	8.1	7.7	7.5	-2.2%	-7.3%
Full-Calorie CSD	91.7	86.9	84.8	-2.4%	-7.5%	7.3	7.0	6.8	-2.3%	-6.7%
No- & Low-Calorie CSD	0.0	0.0	0.0	0.9%	-23.2%	0.8	0.7	0.7	-1.7%	-12.3%
100% Juice & Juice Drinks	55.1	45.6	44.6	-2.2%	-19.2%	4.5	3.8	3.7	-2.1%	-16.9%
RTD Tea	7.6	6.4	5.9	-7.4%	-22.2%	0.9	0.8	0.8	-1.8%	-12.0%
RTD Coffee	0.8	1.0	1.2	10.2%	37.2%	0.0	0.1	0.1	9.9%	34.5%
Energy	2.8	2.3	2.3	0.4%	-17.8%	0.3	0.2	0.2	1.2%	-17.8%
Value-Added Water	0.5	0.8	0.8	1.3%	71.1%	0.2	0.3	0.4	21.2%	84.1%
Sports Drinks	7.9	8.1	8.3	1.9%	4.1%	1.2	1.2	1.2	2.1%	4.1%
Water	0.0	0.0	0.0	-	-	8.4	9.4	9.8	4.1%	16.7%

LITTLE ROCK BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2014 Baseline Estimate	2016 Year 2 Estimate	2017 Year 3 Estimate	2016-17 Percent Change	2014-17 Percent Change	2014 Baseline Estimate	2016 Year 2 Estimate	2017 Year 3 Estimate	2016-17 Percent Change	2014-17 Percent Change
Total	239.5	251.7	243.6	-3.2%	1.7%	30.1	32.5	33.1	1.8%	9.9%
Full-Calorie (>67 Calories per 8 oz.)	217.9	227.2	220.7	-2.8%	1.3%	16.7	17.3	16.8	-3.0%	0.7%
Mid-Calorie (41-67 Calories per 8 oz.)	19.7	22.6	20.9	-7.3%	6.1%	2.9	3.3	3.0	-7.3%	6.1%
Low-Calorie (5-40 Calories per 8 oz.)	1.7	1.8	1.8	0.5%	9.2%	0.5	0.6	0.6	-3.1%	8.8%
No-Calorie (<5 calories per 8 oz.)	0.1	0.1	0.1	-10.1%	-24.9%	10.0	11.3	12.7	12.0%	26.4%
CSD	147.3	152.2	150.1	-1.4%	1.9%	13.7	13.9	13.9	0.0%	1.2%
Full-Calorie CSD	146.7	151.5	149.4	-1.4%	1.8%	11.3	11.6	11.5	-1.3%	2.1%
No- & Low-Calorie CSD	0.2	0.2	0.2	-1.3%	19.6%	2.4	2.2	2.3	6.8%	-3.3%
100% Juice & Juice Drinks	64.9	69.6	68.4	-1.7%	5.4%	5.6	6.0	5.8	-2.2%	4.5%
RTD Tea	15.2	14.9	11.2	-24.9%	-26.3%	1.9	1.8	1.7	-3.0%	-7.2%
RTD Coffee	1.2	1.6	1.6	0.8%	38.2%	0.1	0.1	0.1	-1.4%	34.5%
Energy	2.9	3.4	3.3	-4.2%	12.7%	0.3	0.3	0.3	-4.0%	8.9%
Value-Added Water	0.4	0.4	0.4	-1.5%	-6.8%	0.3	0.4	0.4	1.4%	23.5%
Sports Drinks	7.7	9.6	8.7	-10.2%	12.6%	1.2	1.5	1.3	-9.7%	14.5%
Water	0.0	0.0	0.0	-	-	7.1	8.6	9.5	10.8%	33.9%

APPENDIX: SUMMARY BCI COMMUNITY DATA TABLES

MONTGOMERY-LOWNDES BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2015 Baseline Estimate	2016 Year 1 Estimate	2017 Year 2 Estimate	2016-17 Percent Change	2015-17 Percent Change	2015 Baseline Estimate	2016 Year 1 Estimate	2017 Year 2 Estimate	2016-17 Percent Change	2015-17 Percent Change
Total	280.2	289.5	273.9	-5.4%	-2.2%	40.3	42.7	41.6	-2.5%	3.1%
Full-Calorie (>67 Calories per 8 oz.)	248.4	256.6	243.2	-5.2%	-2.1%	19.1	19.7	18.7	-5.3%	-2.5%
Mid-Calorie (41-67 Calories per 8 oz.)	28.4	29.1	27.3	-6.2%	-3.7%	4.1	4.2	4.0	-6.2%	-3.5%
Low-Calorie (5-40 Calories per 8 oz.)	3.2	3.5	3.2	-8.1%	0.0%	1.0	1.1	1.0	-6.2%	5.3%
No-Calorie (<5 calories per 8 oz.)	0.2	0.2	0.1	-15.1%	-23.3%	16.1	17.6	17.9	1.7%	11.3%
CSD	153.9	159.6	153.9	-3.5%	0.0%	15.3	15.7	15.0	-4.0%	-2.0%
Full-Calorie CSD	153.4	158.9	153.1	-3.7%	-0.3%	12.0	12.4	11.9	-3.5%	-0.3%
No- & Low-Calorie CSD	0.2	0.3	0.4	7.9%	47.5%	3.3	3.3	3.0	-6.5%	-8.9%
100% Juice & Juice Drinks	84.9	87.6	84.0	-4.1%	-1.0%	7.4	7.5	7.2	-4.3%	-3.0%
RTD Tea	20.6	19.9	15.2	-23.8%	-26.4%	2.6	2.6	2.5	-3.8%	-4.6%
RTD Coffee	1.7	1.9	2.1	10.0%	23.2%	0.1	0.1	0.1	14.5%	28.7%
Energy	3.8	4.0	3.7	-8.0%	-1.8%	0.4	0.4	0.4	-6.8%	-1.3%
Value-Added Water	0.6	0.6	0.6	3.1%	-0.6%	0.6	0.8	0.9	11.1%	41.0%
Sports Drinks	14.8	15.9	14.4	-9.5%	-2.5%	2.3	2.5	2.2	-8.9%	-1.6%
Water	0.0	0.0	0.0	-	-	11.6	13.1	13.2	0.9%	14.4%

MISSISSIPPI DELTA BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2015 Baseline Estimate	2016 Year 1 Estimate	2017 Year 2 Estimate	2016-17 Percent Change	2015-17 Percent Change	2015 Baseline Estimate	2016 Year 1 Estimate	2017 Year 2 Estimate	2016-17 Percent Change	2015-17 Percent Change
Total	245.3	250.1	239.2	-4.4%	-2.5%	35.4	36.8	36.7	-0.4%	3.5%
Full-Calorie (>67 Calories per 8 oz.)	221.9	226.0	216.1	-4.4%	-2.6%	17.1	17.4	16.6	-4.4%	-2.9%
Mid-Calorie (41-67 Calories per 8 oz.)	21.2	21.9	20.8	-4.8%	-1.8%	3.1	3.2	3.0	-4.6%	-1.2%
Low-Calorie (5-40 Calories per 8 oz.)	2.1	2.1	2.1	0.2%	0.1%	0.7	0.7	0.7	1.3%	7.7%
No-Calorie (<5 calories per 8 oz.)	0.1	0.1	0.1	-8.8%	-15.4%	14.6	15.5	16.3	4.8%	11.9%
CSD	158.3	162.6	157.5	-3.2%	-0.5%	15.1	15.4	14.8	-3.6%	-1.7%
Full-Calorie CSD	157.6	161.8	156.7	-3.1%	-0.6%	12.2	12.5	12.1	-3.0%	-0.6%
No- & Low-Calorie CSD	0.2	0.2	0.2	2.1%	16.5%	2.8	2.8	2.6	-6.2%	-6.7%
100% Juice & Juice Drinks	58.1	58.2	55.4	-4.9%	-4.8%	5.2	5.1	4.9	-4.4%	-6.0%
RTD Tea	14.7	13.5	11.0	-18.9%	-25.3%	1.8	1.9	1.9	0.8%	5.6%
RTD Coffee	0.9	1.1	1.3	13.5%	44.1%	0.1	0.1	0.1	12.0%	43.1%
Energy	2.5	2.7	2.8	2.8%	15.1%	0.2	0.3	0.3	4.6%	17.3%
Value-Added Water	0.3	0.3	0.3	15.4%	8.8%	0.4	0.4	0.5	7.3%	31.7%
Sports Drinks	10.6	11.6	10.9	-5.6%	2.7%	1.6	1.8	1.7	-4.9%	3.5%
Water	0.0	0.0	0.0	-	-	11.1	12.0	12.6	5.3%	13.2%

APPENDIX: SUMMARY BCI COMMUNITY DATA TABLES

BRONX-BROOKLYN BCI COMMUNITY SUMMARY DATA TABLE

Category	Average Calories Per Person Per Day					Total Volumes Per Person Per Day (Ounces)				
	2015 Baseline Estimate	2016 Year 1 Estimate	2017 Year 2 Estimate	2016-17 Percent Change	2015-17 Percent Change	2015 Baseline Estimate	2016 Year 1 Estimate	2017 Year 2 Estimate	2016-17 Percent Change	2015-17 Percent Change
Total	110.6	115.9	110.0	-5.0%	-0.5%	20.1	21.9	22.4	2.2%	11.1%
Full-Calorie (>67 Calories per 8 oz.)	102.9	107.7	102.2	-5.1%	-0.7%	8.0	8.3	7.9	-5.1%	-0.8%
Mid-Calorie (41-67 Calories per 8 oz.)	7.1	7.5	7.2	-3.1%	1.8%	1.0	1.1	1.1	-3.0%	2.5%
Low-Calorie (5-40 Calories per 8 oz.)	0.6	0.7	0.6	-10.8%	3.6%	0.2	0.2	0.2	-11.0%	8.2%
No-Calorie (<5 calories per 8 oz.)	0.0	0.0	0.0	9.2%	22.0%	10.9	12.2	13.2	7.9%	20.7%
CSD	58.5	58.5	56.6	-3.2%	-3.3%	5.3	5.3	5.2	-3.1%	-2.9%
Full-Calorie CSD	58.4	58.4	56.5	-3.2%	-3.3%	4.7	4.7	4.5	-2.8%	-2.8%
No- & Low-Calorie CSD	0.0	0.1	0.0	-4.2%	21.5%	0.7	0.7	0.6	-4.5%	-4.0%
100% Juice & Juice Drinks	39.7	43.9	41.0	-6.6%	3.2%	3.2	3.4	3.2	-6.6%	1.8%
RTD Tea	7.8	8.4	7.5	-10.2%	-4.2%	0.9	1.0	0.9	-6.9%	-0.8%
RTD Coffee	0.5	0.6	0.7	17.3%	52.0%	0.0	0.0	0.0	12.7%	39.4%
Energy	1.7	1.9	1.8	-5.6%	6.6%	0.2	0.2	0.2	-0.6%	9.1%
Value-Added Water	0.5	0.5	0.5	-12.7%	-10.8%	0.7	1.1	1.1	5.3%	54.7%
Sports Drinks	1.8	2.1	1.9	-7.1%	6.8%	0.3	0.3	0.3	-7.3%	7.9%
Water	0.0	0.0	0.0	-	-	9.5	10.5	11.4	8.6%	19.9%

Estimates of per person LRB calorie consumption in the Bronx-Brooklyn BCI Community are more uncertain than estimates in other markets due to data coverage limitations. More details about the limitations of the Bronx-Brooklyn analysis can be found in call-out box 4 of the 2025 Beverage Calories Initiative: Communities Initiative Baseline Report & 2015 Update.

UNITED STATES AND BCI COMMUNITY POPULATION SUMMARY TABLE

Time Period	United States Total ¹	Eastern L.A. BCI Community ²	Little Rock BCI Community ²	Montgomery-Lowndes BCI Community ²	Mississippi Delta BCI Community ²	Bronx-Brooklyn BCI Community ²
2014	318,563,456	286,898	98,277	N/A	N/A	N/A
2015	320,896,618	288,418	98,267	238,964	79,093	312,434
2016	323,127,513	287,499	98,414	238,615	78,381	311,876
2017	325,719,178	288,225	98,591	238,735	77,675	314,553
2014-2015 percent change	0.7%	0.5%	0.0%	N/A	N/A	N/A
2015-2016 percent change	0.7%	-0.3%	0.1%	-0.1%	-0.9%	-0.2%
2016-2017 percent change	0.8%	0.3%	0.2%	0.1%	-0.9%	0.9%
Percent Change from Baseline	2.2%	0.5%	0.3%	-0.1%	-1.8%	0.7%

¹ United States Census Bureau. (2018). Annual Estimates of the Resident Population for the United States, Regions, States, and Puerto Rico: April 1, 2010 to July 1, 2017 (NST-EST2017-01). Washington, DC: U. S. Government Printing Office.

² Keybridge estimate using U.S. Census Bureau American Community Survey data. See detailed methodology document for full estimation methodology and data sources.