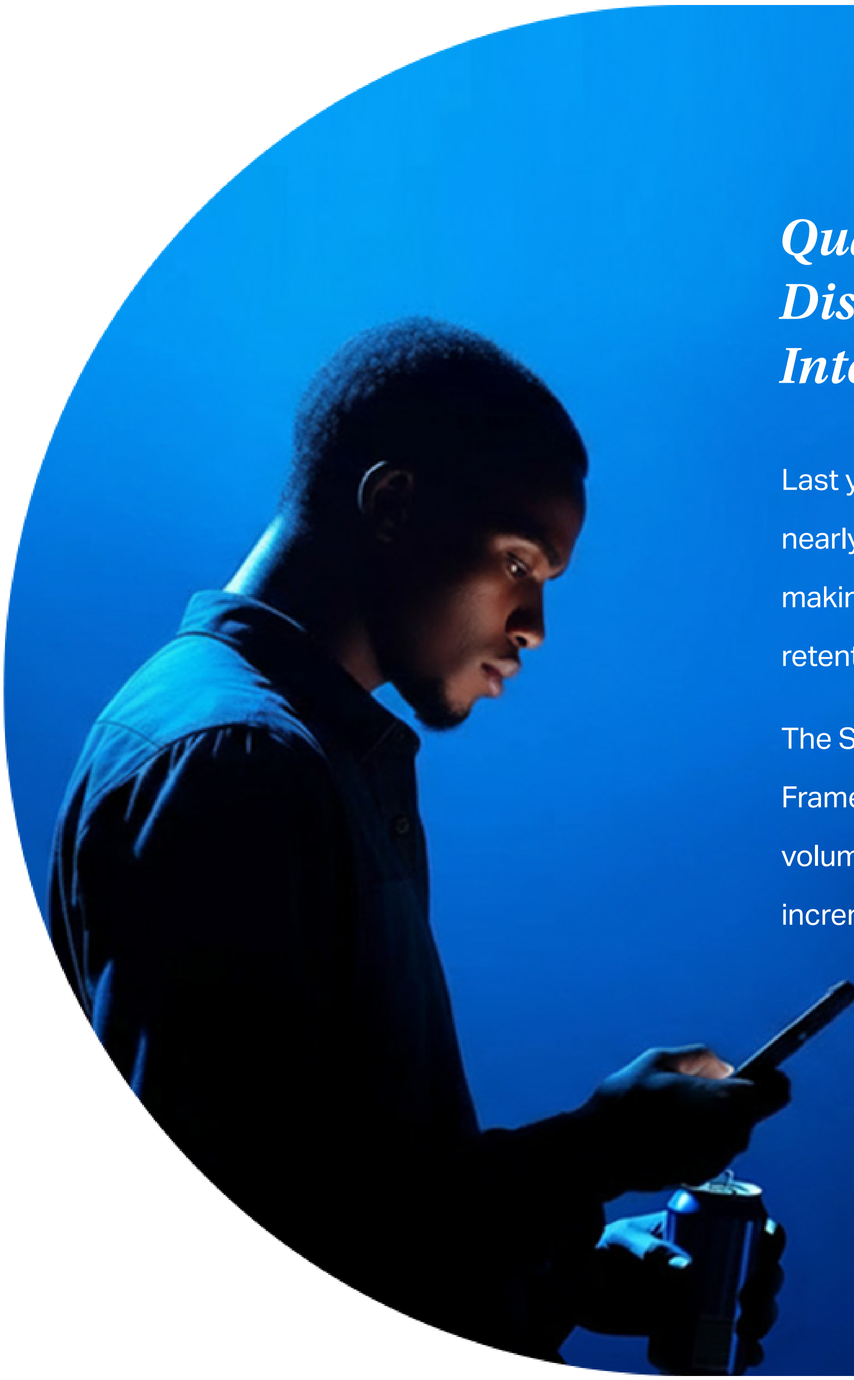
THE SAY–DO GAP

A Proprietary Measurement Framework



Quantifying the Distance Between Intention and Action

Last year, the Grocery channel lost nearly 3 billion units in volume[1]—making unit growth and price-premium retention harder than ever.

The Say–Do Gap Measurement Framework pinpoints where to rebuild volume, defend value, and capture incremental growth.

[1] "Reviving Growth in the Food and Beverage Channel," NielsenIQ, 08 November 2024.

By directly linking what people say they value with what they actually purchase, the Say–Do Gap quantifies a disconnect long recognized but never accurately measured by business leaders, brand strategists, and category leaders. The result is a standardized behavioral metric that connects consumer intention to commercial performance—informing growth, pricing, and innovation decisions.

Now, CPG executives can quantify, track, and monetize the distance between belief and behavior—uniting attitudinal and behavioral data into a single, interpretable metric that applies consistently across cohorts, attributes, and markets worldwide.

How It Works

For a given cohort—for example, 18–25-year-old households—the Say–Do Gap measures how this group's stated attitudes differ from their actual purchase behavior.

While the framework can be applied across any core attribute or claim set—such as health, convenience, indulgence, or sustainability—it's illustrated here using sustainability-related attributes (for example, eco-packaging, regenerative sourcing, or recyclability).

Powered by NIQ's linked panel data, these stated preferences are mapped directly to verified purchase behavior for products carrying those same claims.

From this, a Say Index and a Do Index are calculated—each weighted for relevancy based on client priorities. The difference between the two creates a Say–Do Gap score, revealing the degree of alignment or opportunity.

Simplified Scoring Illustration

Say Index =
Cohort % claiming importance ÷ Total population %*

Do Index =
Cohort spend on claim ÷ Total population spend*

Say–Do Gap =
Say Index – Do Index

For instance, if 18–25-year-old households are 15% more likely than average to say sustainability matters (Say Index = 115), but spend 10% less on sustainable products (Do Index = 90), the resulting Say–Do Gap of +25 points signals a clear incremental opportunity.

Conversely, if the Say–Do Gap score were +2, it would confirm that the cohort's stated priorities and purchase behavior are closely aligned—validating current positioning, messaging, and portfolio strategy.

That score becomes a unifying metric across marketing, innovation, R&D, and insights—aligning stakeholders around a shared understanding of where belief and behavior converge, and where the greatest opportunity lies to close the distance between them. Over time, the model's output can be trended to demonstrate directional progress and quantify the ROI of closing identified gaps or maintaining a near-zero gap.

What It Reveals

Alignment and Confidence

A low or near-zero Say–Do Gap confirms that brand, message, and market behavior are in sync—validating current strategy and signaling limited whitespace for innovation or messaging. This is often the path of least resistance for a brand—lean into what's working and reinforce the advantage.

Whitespace Opportunities

A high positive Say–Do Gap exposes unfulfilled consumer intent, where stated interest exceeds purchase behavior. These gaps highlight clear whitespace for innovation and help define activation, messaging, or pricing moves to close the gap and capture incremental growth.

Latent Loyalty or Understated Demand

A negative Say–Do Gap reveals where consumers buy more than they claim to care about—showing that certain attributes or claims have become ubiquitous or table stakes. These areas often surface premiumization opportunities where brands can innovate, reformulate, refine messaging, or elevate on-pack claims to command higher value without losing volume.

Strategic Flexibility

The model is designed for continuous refresh, allowing clients to monitor how the Say–Do Gap score trends over time as strategies, messaging, or market conditions evolve. Weighting can be applied to either the "say" or "do" side to reflect specific strategic priorities, and the framework pinpoints which attributes and claims exert the greatest influence on shifts in alignment or behavior. It integrates seamlessly with existing NIQ tracking and reporting structures, enabling repeatable deployment across categories and geographies. This flexibility ensures relevance to evolving business priorities—from pack innovation to claim development to portfolio optimization and brand messaging.

Why It Matters

The Say–Do Gap Measurement Framework introduces a unified behavioral metric with the power to align cross-functional stakeholders around a single measure of consumer truth. It replaces assumption with evidence—tracking, prioritizing, and monetizing the relationship between belief and behavior at scale. Validated across multiple categories and markets, the metric shows strong predictive alignment with in-market performance, innovation adoption, and share momentum—turning consumer sentiment into foresight.

In Practice

Grounded in NIQ's linked survey-to-purchase panels across more than 25 countries, the Say–Do Gap Measurement Framework Index transforms attitudinal insight into behavioral proof—revealing where belief drives buying, where it doesn't, and how much incremental value can be unlocked by closing the distance between the two. For leadership, it delivers a single, data-driven metric for understanding and managing consumer intent—globally, consistently, and with commercial precision.

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Say–Do Gap framework is a proprietary analytical framework.
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**Expressed as an index*

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About NIQ

NIQ is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than $7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

For more information, visit **NIQ.com**