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February 2021

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SNACK BARS



Forbes

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**Certified
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The Method

WE ARE AN A.I. POWERED INSIGHTS SOLUTION

We are redefining how we can understand people's mindset, sentiment and insights without the limitations, cost and time constraints of traditional methods like online surveys, polls or focus groups. We are privacy compliant and uniquely able to report findings by deep segmentation, globally.

With the power of A.I., we have tech-enabled a way to mine and discover actionable Cultural Intelligence® straight from the digital voice of the people.

Our algorithm turns all available open-source digital discussions happening anywhere, not just on social media, into actionable insights, without having to ask any questions.



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Key Burning Questions

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What are the **motivations** to consume Snack Bars?

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Do **segments** have different motivations that make them unique, and do they share similarities with the overall population?

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How does **aging** impact consumer behavior in each segment?

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Snack Bars: Our Universe of Conversations

**Based on US digital conversations starting in March 1, 2020 and ending in December 15, 2020*

DISboards



CulturIntel analyzed

288K

Relevant digital conversations about
Frozen Breakfast.*

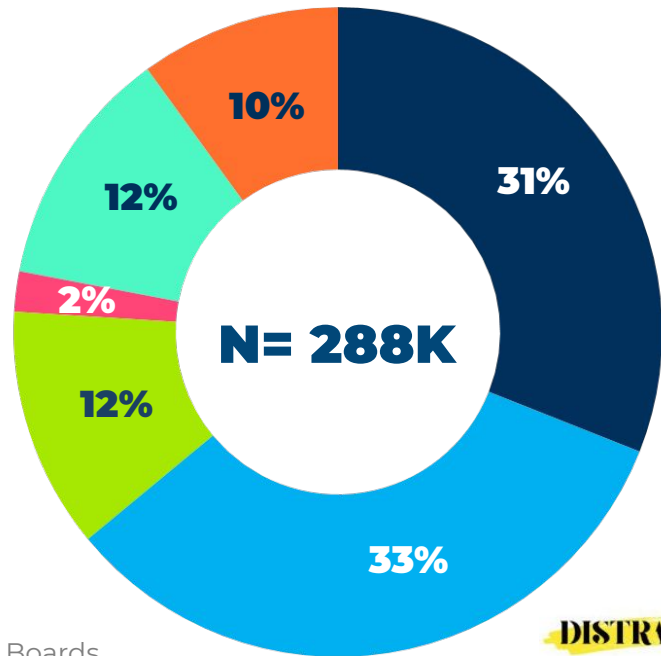
General:

- Black Americans - 21.4K
- Hispanics - 18.6K
- Asian Americans - 10.5K
- LGBTQ - 18.4K
- Living w/Disabilities - 1.7K

Boomers:

- All Boomers - 9.7K
- Black Americans - 1.1K
- Hispanics - 674
- Asian Americans - 518
- LGBTQ - 958
- Living w/Disabilities - 102

*Snack Bars category was defined by Kellogg's' brands and key competitors brands.
Segmentation is based on self-identification.



- Message Boards
- Topical Sites
- Social Networks
- Comments
- Reviews
- Blogs

MESSAGE BOARDS

An internet forum or message board is an online discussion site where people can hold conversations in the form of posted messages

TOPICAL SITES

Topical sites are sites that relate to a specific topic

COMMENTS

Comments are conversations happening on a comment box

DISTRACTIFY

A note on the methodology

The product category was defined according to Kellogg's brand portfolio and key competitors. See in the appendix for the list of all brands included.

The segmentation is based on how people self-identify in the conversation or on their public profile. For people with disabilities, we captured conversations from people who self-identify as living with disabilities or having someone in the household who does identify as such. For LGBTQ community, we harvested conversations from people who self-identify as pertaining to the LGBTQ community overall or to any of the subcommunities.

The examples of message boards and topical sites are for illustrative purpose and do not represent the most important destination where people discuss the category. Conversations are scattered across multiple sites and there is not one site that is the top site where most of the conversations happen.



HOW TO USE THE INSIGHTS FROM THIS REPORT

1

The insights from CulturlIntel are meant to provide an additional perspective to the insight work already done on the product category. **They are just one piece of all of your insights pie.**

2

The insights reflect what people say **spontaneously, online**, in their peer-to-peer conversations when no one is probing them. As such they may provide a **complementary lens** to traditional qualitative and quantitative research and are not meant to replace it.

3

The timeframe of the study is the **COVID-era** from March 2019 to December 2020. The insights may reflect some **temporary shifts** due to the pandemic but also some **consolidation of consumption motivations**.

4

The insights from this study are meant to bring some **starting points** when it comes to motivations to consume your product categories, especially across diverse segments. The next step is to work with the I&A team to see how those territories and themes can bring some **inspiration** for communication territories, messaging strategies and product claims.

1

What are the **motivations** to consume Snack Bars?

Straight from the conversations, we identified 4 motivations to consume Snack Bars that range from functional (convenient/tasty) benefits associated to the category to functional (convenient/healthy) benefits.

**FUNCTIONAL:
CONVENIENT TASTY**

**FUNCTIONAL:
CONVENIENT HEALTHY**

**IMPULSE
SNACKING**

Consumption of the product between the consumer's regular main meals, that can be triggered by hunger or cravings.

“ Love these bars! anytime I want a snack! ”

TASTE

The overall experience and perception of flavor.

“ I buy all the flavors that the bars come in, and I love them all. ”

CONVENIENCE

The ease, speed and simplicity in which the product is consumed, stored and prepared.

“ I keep a few of these in my nightstand. When I come home from night shift, it's a easy bedtime snack. ”

NUTRITION

The ability for the product to provide the necessary nourishment for health and growth.

“ Nutrition information states lots of organic ingredients. I'm hooked! ”

1

What are the **motivations** to consume Snack Bars?

For each motivation, there is a set of **sub-motivations** that further illustrate how the motivation triggers people to consume Snack Bars.

**FUNCTIONAL:
CONVENIENT TASTY**

**FUNCTIONAL:
CONVENIENT HEALTHY**

Motivations:

IMPULSE
SNACKING

TASTE

CONVENIENCE

NUTRITION

Consumption of the product between the consumer's regular main meals, that can be triggered by hunger or cravings.

Consumption of the product between the consumer's regular main meals.

The ease, speed and simplicity in which the product is consumed, stored and prepared.

The ability for the product to provide the necessary nourishment for health and growth.

Submotivations:

Satisfying option
Option variety

Variety
Flavor
Texture

Fast & Easy
Portable

Guiltless Indulgence
Wholesome Ingredients
Nutritional Benefits



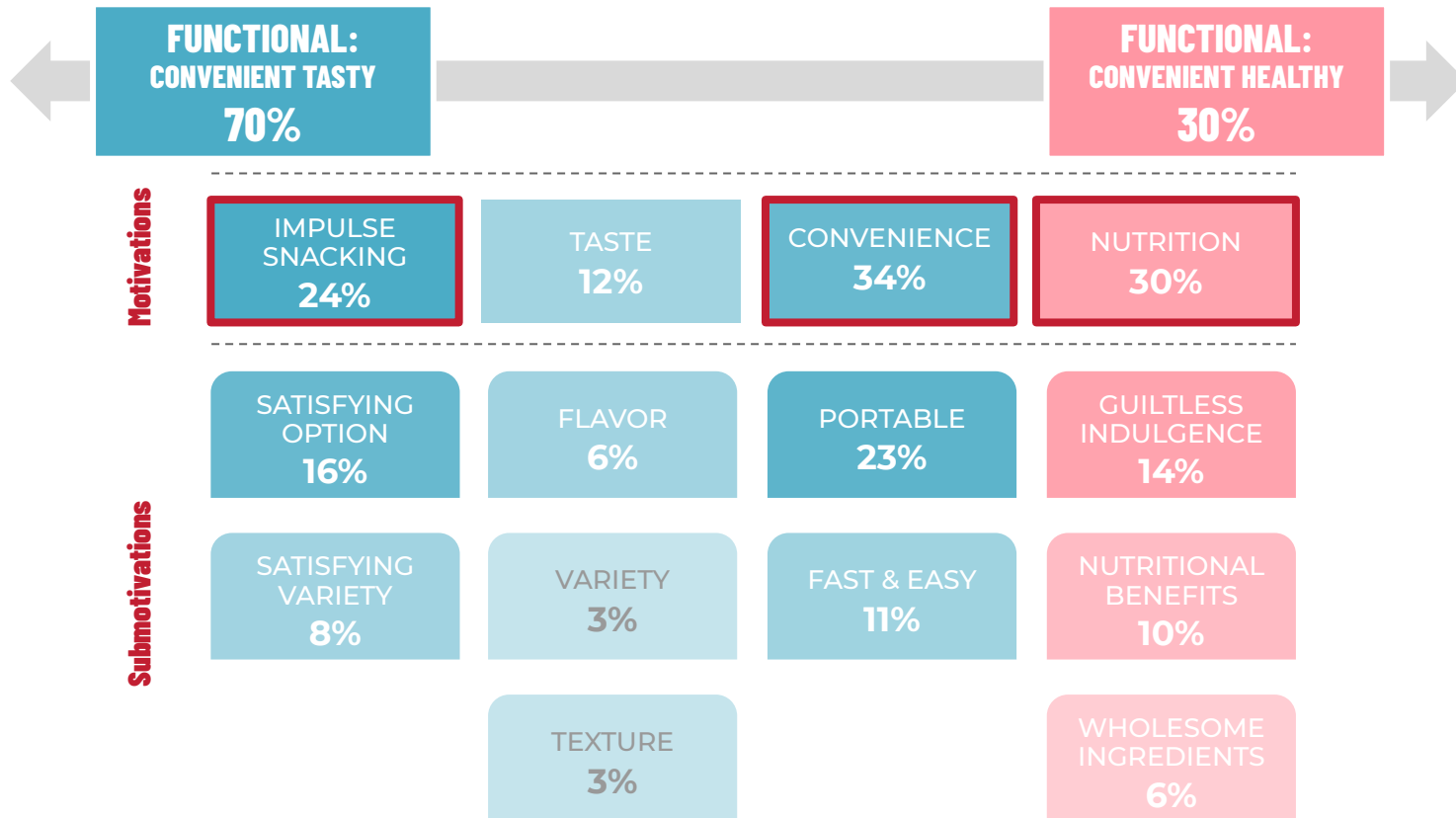
1

What are the **motivations** to consume Snack Bars?

The Overall Population is motivated to consume Snack Bars by **convenience** (34%), **nutrition** (30%), and **impulse snacking** (24%).

The most important sub-motivators are portability (23%), satisfying options (16%) and guiltless indulgence (14%).

MOTIVATION DIAGRAM: Overall Population



MOTIVATION SUMMARY SLIDE: Overall Segments

	OVERALL N=288K	BLACK AMERICANS N=21.4K	HISPANICS N=18.6K	ASIAN AMERICANS N=10.5K	LGBTQ N=18.4K	P. W/DISABILITIES N=1.7K
MOTIVATION #1	CONVENIENCE 34% Portable 23% Fast & Easy 11%	CONVENIENCE 36% Portable 21% Fast & Easy 15%	IMPULSE SNACKING 36% Satisfying option 18% Satisfying variety 18%	NUTRITION 33% Guiltless indulgence 13% Wholesome ingredients 11% Nutritional benefits 10%	NUTRITION 35% Guiltless indulgence 18% Wholesome ingredients 10% Nutritional benefits 7%	CONVENIENCE 46% Fast & Easy 29% Portable 17%
MOTIVATION #2	NUTRITION 30% Guiltless indulgence 14% Nutritional benefits 10% Wholesome ingredients 6%	IMPULSE SNACKING 33% Satisfying option 23% Satisfying variety 10%	CONVENIENCE 36% Portable 19% Fast & Easy 17%	CONVENIENCE 32% Portable 16% Fast & Easy 16%	CONVENIENCE 30% Fast & Easy 16% Portable 14%	NUTRITION 27% Wholesome ingredients 10% Nutritional benefits 10% Guiltless indulgence 7%
MOTIVATION #3	IMPULSE SNACKING 24% Satisfying option 16% Satisfying variety 8%	NUTRITION 17% Guiltless indulgence 7% Nutritional benefits 6% Wholesome ingredients 3%	TASTE 17% Variety 6% Texture 6% Flavor 5%	IMPULSE SNACKING 23% Satisfying option 11% Satisfying variety 12%	IMPULSE SNACKING 23% Satisfying variety 13% Satisfying option 10%	IMPULSE SNACKING 17% Satisfying variety 10% Satisfying option 7%

MOTIVATION SUMMARY SLIDE: Segments

BLACK AMERICANS

They consume Snack bars because of the **convenience**, the fact that it is portable and fast & easy. They are more motivated by **impulse snacking**, as they see it as a snack bars as a fulfilling and satisfying option.

They are less driven by the nutritional aspect of such products.

HISPANICS

They consume Snack bars equally because of its **convenience**, as it offers a fast and easy option, and as **an impulse snack** due to the rich variety of offerings. **Taste** is also their 3rd motivation.

They are less driven by the nutritional aspect of such products.

ASIAN AMERICANS

They are first motivated by the **nutritional profile** of snack bars, especially their wholesome ingredients) as well as their **convenience**.

They are also driven by **impulse snacking** especially due to the rich variety of offerings.

LGBTQ

They are the **most motivated by nutrition**, especially because of the wholesome ingredients. They are also driven by the **convenience** as they are fast and easy to consume.

Impulse snacking also drive their consumption positively influenced by the rich **variety of bars**.

P. W/DISABILITIES

They are **the segment the most driven by convenience** as the fact that snack bars are fast and easy is even more relevant for them than the portability of the product.

They are also motivated by the **nutritional aspect of snack bars**, especially their **wholesome ingredients**.



2

Do **Black Americans** have different motivations that make them unique, and do they share similarities with the overall population?

Impulse snacking:

"I usually grab one when I see it at checkout"

Convenience:

"a quick and easy snack I always keep in my car"

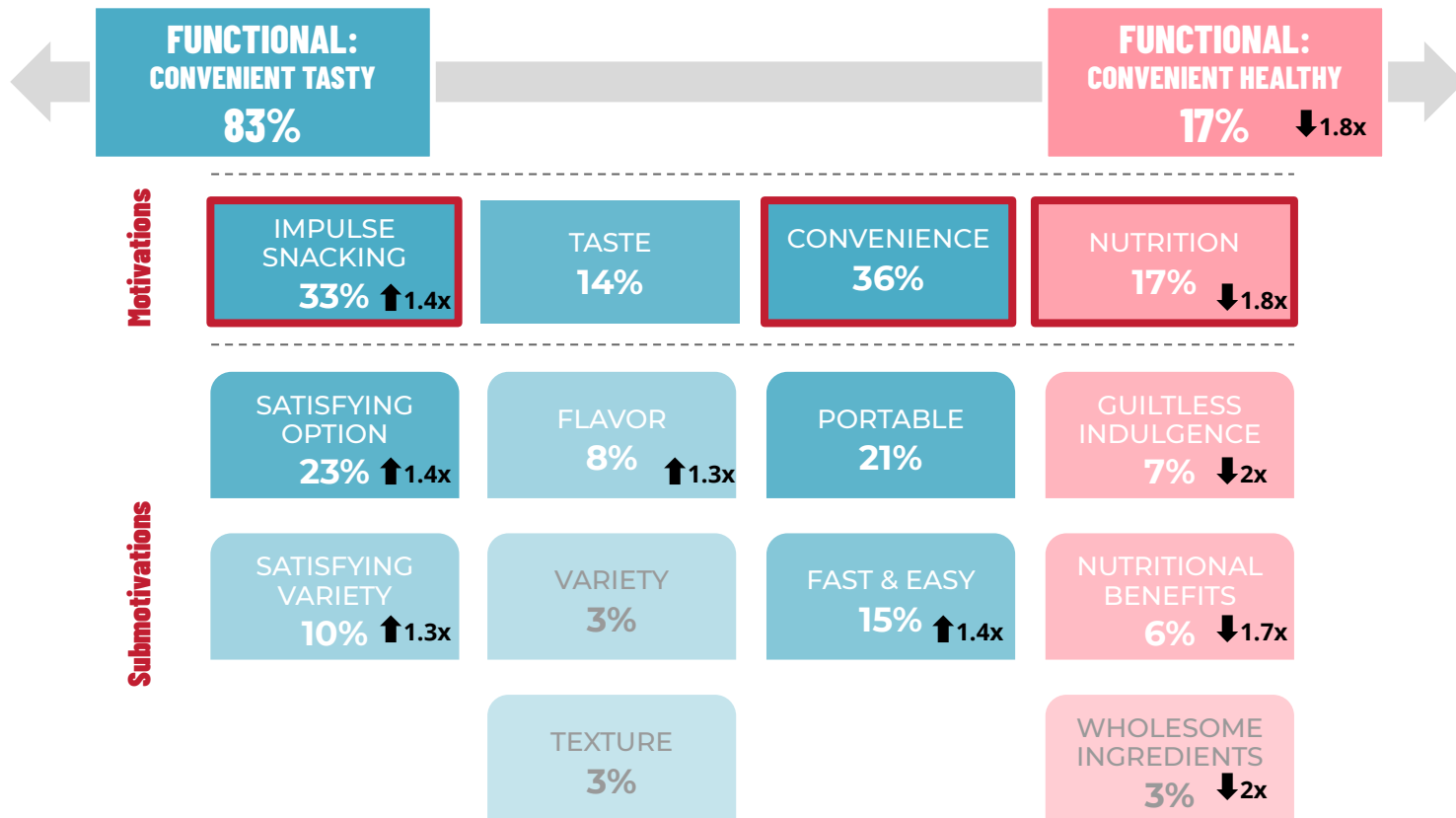
Nutrition:

"A snack I can feel good about eating"

They are driven by convenience (36%), impulse snacking (33%) and nutrition (17%).

In general, they are 1.8x less motivated by nutrition and 1.4x more motivated by **impulse snacking**. They are particularly motivated by **fast and easy** (1.4x).

MOTIVATION DIAGRAM: Black Americans



The background of the slide is a close-up photograph of several granola bars. The bars are golden-brown and appear to be made of oats, nuts, and dried fruit. They are arranged in a slightly overlapping manner, with some in sharp focus and others blurred in the background. The lighting is bright, highlighting the texture of the granola.

2

Do **Hispanics** have different motivations that make them unique, and do they share similarities with the overall population?

Impulse snacking:

"I'll grab one when I'm bored."

Taste:

"I crave the cinnamon roll flavor"

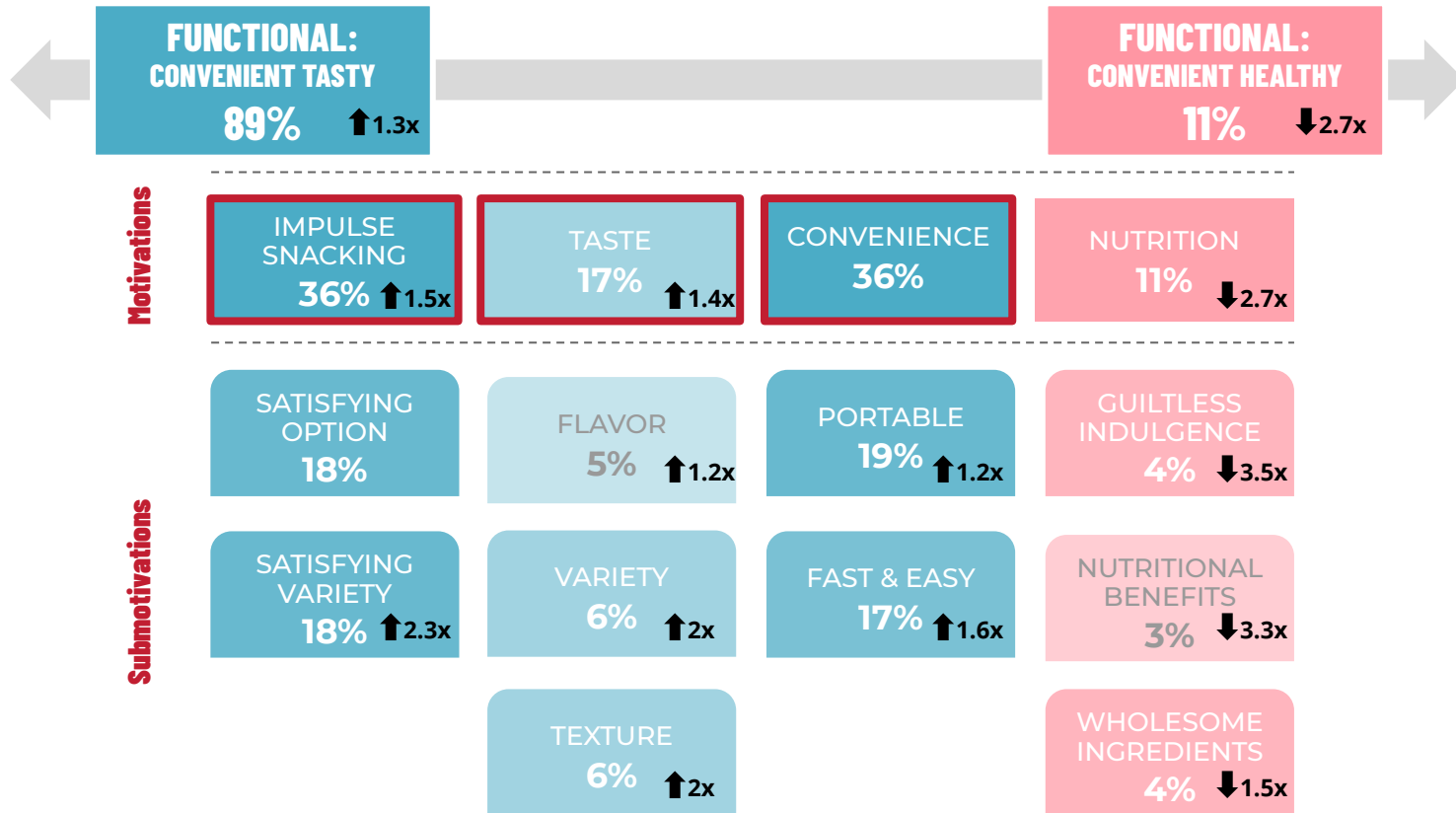
Convenience:

"An easy snack to have."

Hispanics are driven by convenience (36%), impulse snacking (36%) and taste (17%).

They focus on nutrition 2.7x less than the overall population. Instead they are motivated by **satisfying variety** (2.3x) and convenience, especially **fast and easy** (1.6x).

MOTIVATION DIAGRAM: Hispanics



N=9.9K

 Top 3 Motivations

↑↓ Variations against Overall



2

Do **Asian Americans** have different motivations that make them unique, and do they share similarities with the overall population?

Impulse snacking:

"I keep them around for when the munchies hit."

Nutrition:

"they are a healthy snack."

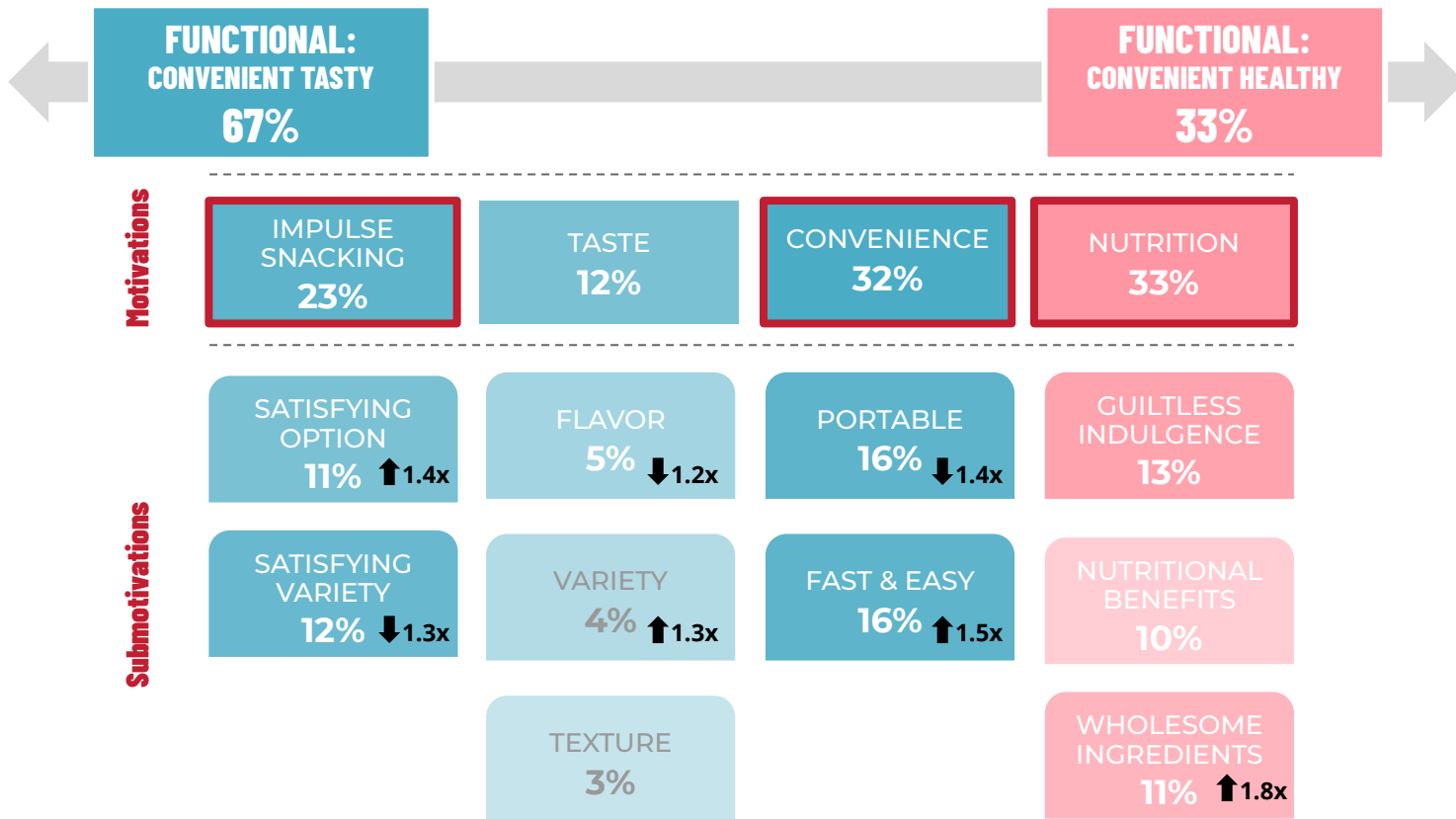
Convenience:

"an easy to carry filling snack when I need one"

They are driven by nutrition (33%), convenience (32%) and impulse snacking (23%).

In the sub-motivators, they focus more on **wholesome ingredients** (1.8x), **fast & easy** (1.5x), and **satisfying options** (1.4x).

MOTIVATION DIAGRAM: Asian Americans





2

Do **LGBTQ** have different motivations that make them unique, and do they share similarities with the overall population?

Impulse snacking:

“my favorite choice when the snacking monster hits me”

Convenience:

“no fuss no muss treat when I need a little something.”

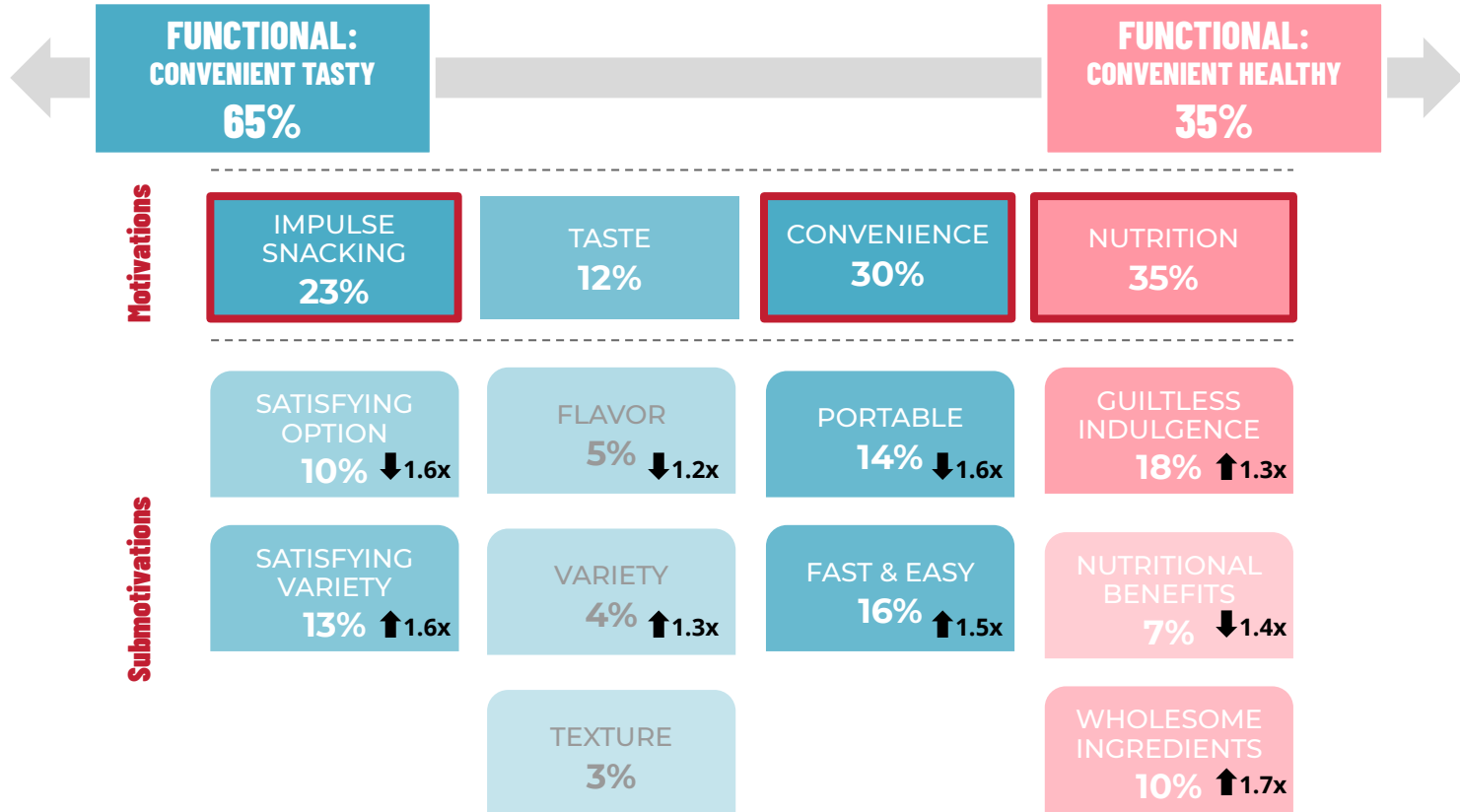
Nutrition:

“I feel better with this than choosing some sugar bomb”

They are driven by nutrition (35%), convenience (30%) and impulse snacking (23%).

In the sub-motivators, they focus more on **wholesome ingredients** (1.7x), **satisfying variety** (1.6x), and **fast & easy** (1.5x).

MOTIVATION DIAGRAM: LGBTQ



A close-up photograph of a chocolate almond bar, partially broken, showing the texture of the chocolate and the almonds inside. The bar is set against a blurred background of more almonds and chocolate shavings.

2

Do **People With Disabilities** have different motivations that make them unique, and do they share similarities with the overall population?

Impulse snacking:

“When I want a distraction I usually grab one.”

Convenience:

“a simple snack that tastes great”

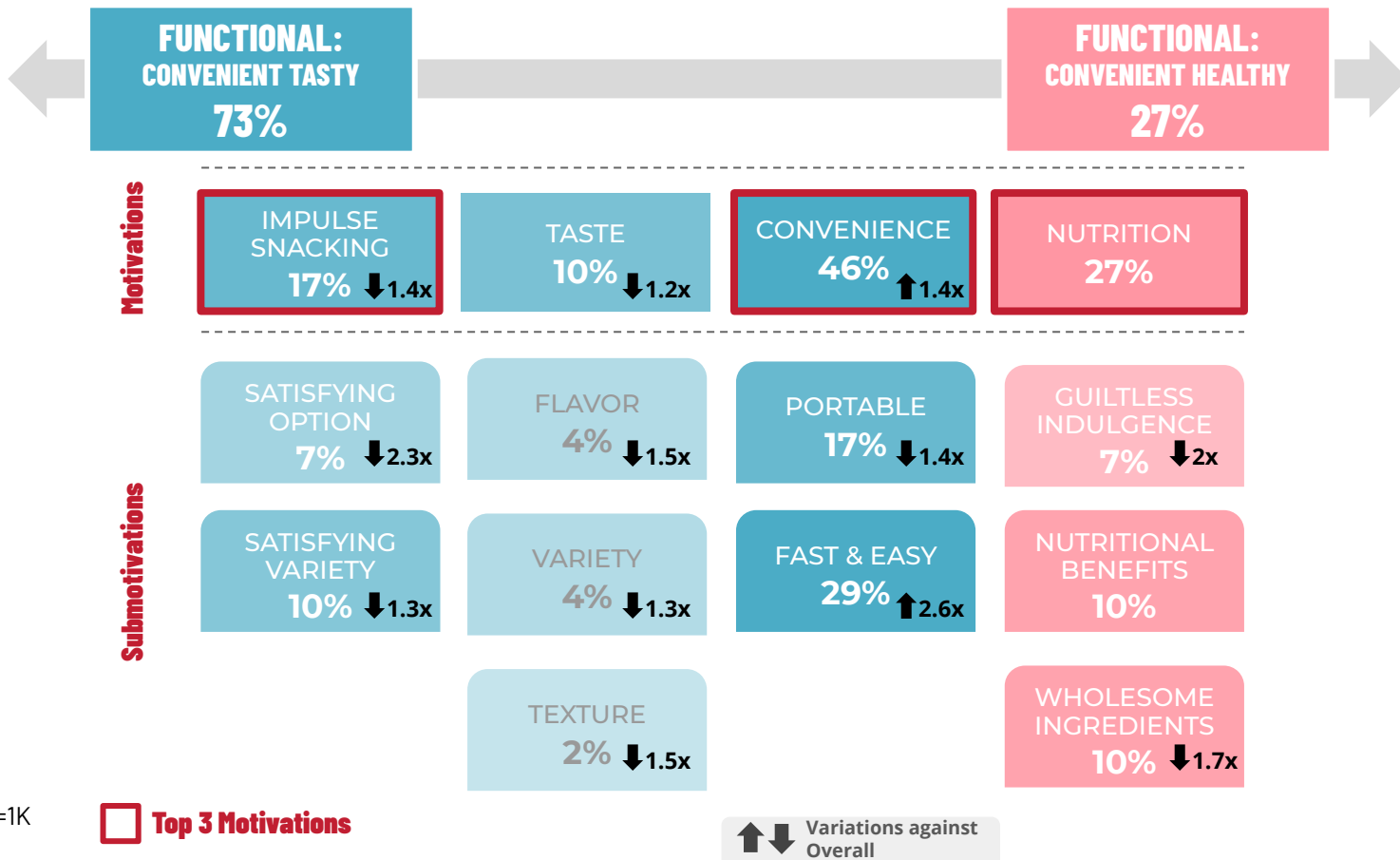
Nutrition:

“made with healthy natural ingredients”

They are driven by convenience (46%), nutrition (27%) and impulse snacking (17%).

They value **convenience** (1.4x) more than impulse snacking and taste compared to overall population. **Fast and easy** is 2.6x more relevant for this segment, the fact that the product is portable is slightly less relevant for them.

MOTIVATION DIAGRAM: People Living with Disabilities





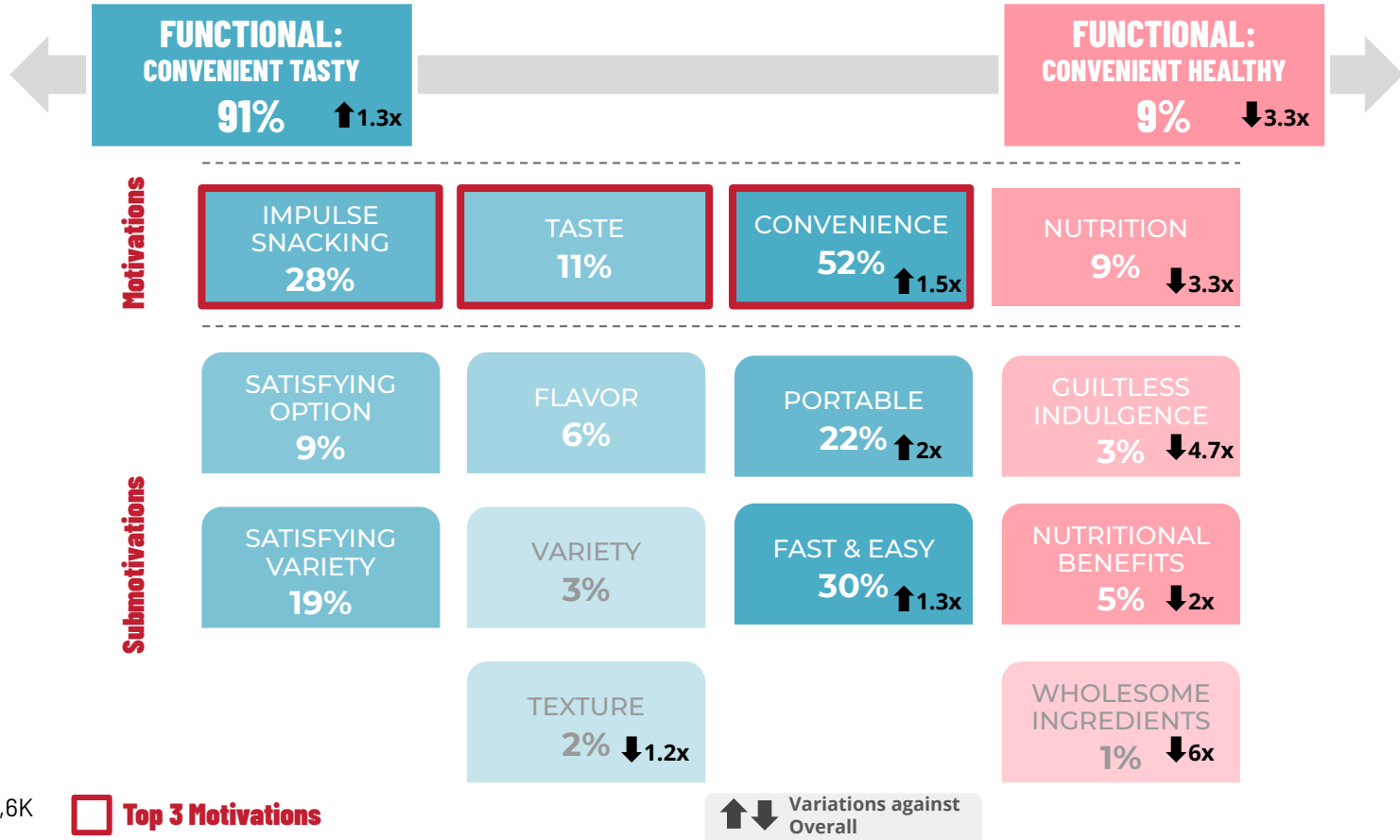
3

How does **aging** impact consumer behavior for **overall population**?

Aging impacts consumer behavior in snack bars. They are driven by convenience (52%), impulse snacking (28%) and taste (11%).

Their consumption is more driven by **convenience** (1.3x), especially **portability** (2x) and the fact that the products are **fast & easy** to consume (1.3x vs. overall)

MOTIVATION DIAGRAM: Overall Boomers



MOTIVATION SUMMARY SLIDE: Boomers Segments

	OVERALL N=9.7K	BLACK AMERICANS N=1.1K	HISPANICS N=674	ASIAN AMERICANS N=518	LGBTQ N=958	P. W/DISABILITIES N=102
MOTIVATION #1	CONVENIENCE 52% Fast & Easy 30% Portable 22%	CONVENIENCE 46% Fast & Easy 24% Portable 22%	CONVENIENCE 52% Portable 28% Fast & Easy 24%	CONVENIENCE 49% Fast & Easy 25% Portable 24%	CONVENIENCE 47% Fast & Easy 26% Portable 21%	CONVENIENCE 43% Fast & Easy 30% Portable 13%
MOTIVATION #2	IMPULSE SNACKING 28% Satisfying variety 19% Satisfying option 9%	IMPULSE SNACKING 36% Satisfying variety 23% Satisfying option 12%	IMPULSE SNACKING 33% Satisfying option 19% Satisfying variety 14%	IMPULSE SNACKING 27% Satisfying variety 18% Satisfying option 9%	IMPULSE SNACKING 24% Satisfying variety 14% Satisfying option 10%	TASTE 28% Flavor 17% Variety 8% Texture 3%
MOTIVATION #3	TASTE 11% Flavor 6% Variety 3% Texture 2%	TASTE 16% Flavor 10% Variety 3% Texture 3%	TASTE 14% Variety 9% Texture 3% Flavor 2%	NUTRITION 15% Nutritional benefits 9% Guiltless indulgence 4% Wholesome ingredients 2%	NUTRITION 19% Guiltless indulgence 10% Wholesome ingredients 5% Nutritional benefits 4%	NUTRITION 21% Guiltless indulgence 9% Nutritional benefits 7% Wholesome ingredients 6%

MOTIVATION SUMMARY SLIDE: Boomers Segments

BLACK AMERICANS

Black American Boomers are focused even more on **convenience** as they appreciate products that are fast and easy to consume on top of being portable.

They are still driven by **impulse snacking** especially because of the variety of products.

They are even less focused on nutrition than the overall Black community.

HISPANICS

As they age, Hispanic Boomers are more focused on the **convenience benefit** especially the portability of the products and the fact that they are fast and easy to consume.

They are more motivated to consume them as an impulse due to **their satisfying variety**.

They are less focused on the nutritional aspect than the overall Hispanic community.

ASIAN AMERICANS

As they age, they are 1.3x more driven by the fact that they are **convenient**, fast and easy to consume and portable. They also appreciate even more the **satisfying variety** of the product offering.

They are still driven by the **nutritional profile** but twice less than the overall Asian American community.

LGBTQ

As they age, LGBTQ are also driven by the **convenience** of the products, especially the fact that they are fast and easy to consume and portable.

Impulse snacking is also still relevant as they appreciate the satisfying variety that can trigger them to open a bar.

They are one of the segments most motivated by **nutrition** but twice less than the overall LGBTQ community.

P. W/DISABILITIES

As they age, People With Disabilities are driven by **convenience** as well, especially the fact that they are fast and easy to consume.

They are also **2.8x** more driven by the taste especially the flavors, variety and texture than overall people in their community and overall Boomers.

They are the segment the most driven by **nutrition** of all Boomers as they see snack bars at a guiltless indulgence with nutritional benefits and wholesome ingredients..



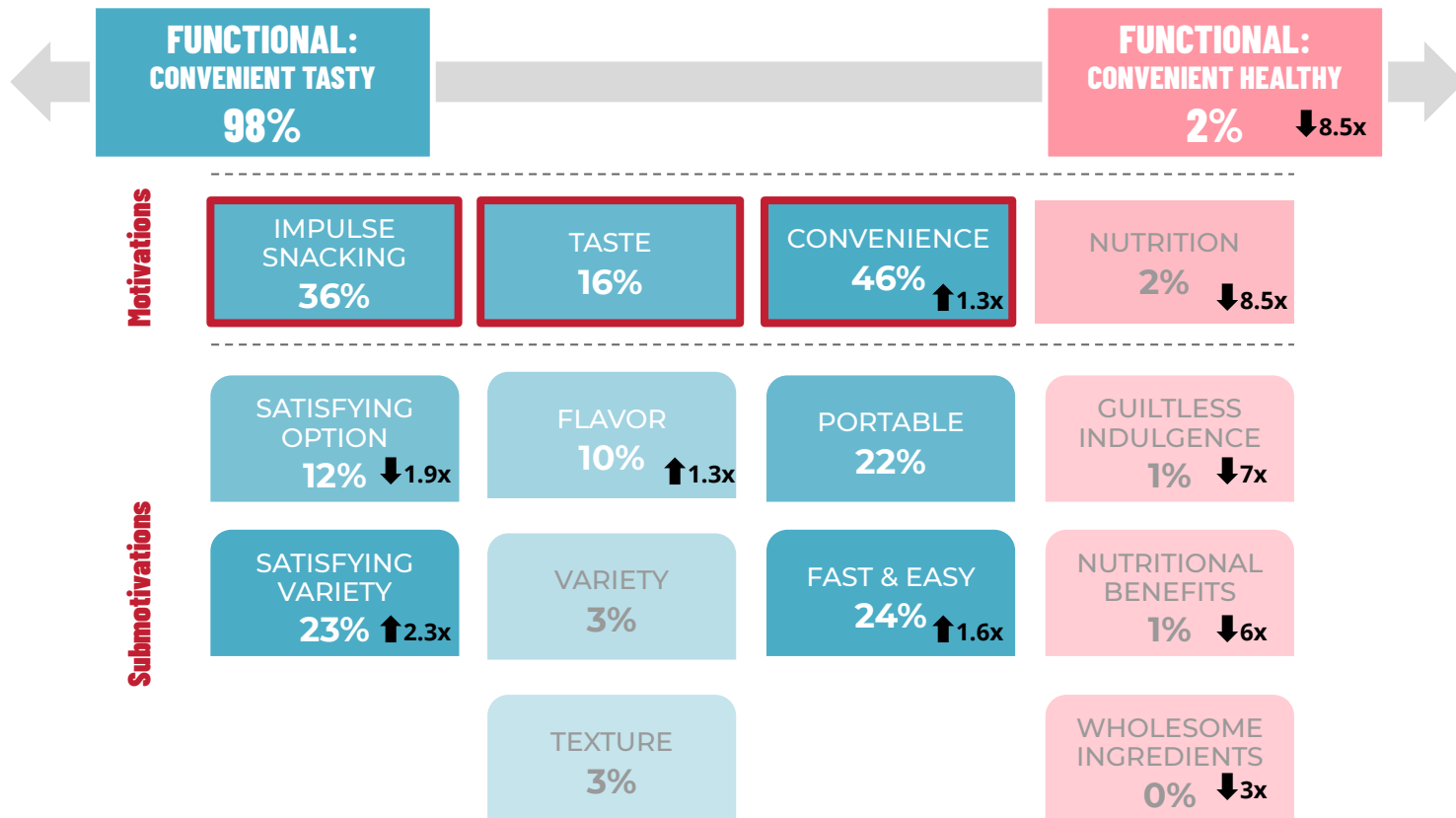
3

How does **aging** impact consumer behavior for **Black Americans**?

Black Americans Boomers are driven by **convenience (46%)**, **impulse snacking (36%)**, and **taste (16%)**.

Aging impacts their consumer behavior in snack bars, because they focus 8.5x less on health and nutrition. Instead, they focus more on **convenience (1.3x)**, specifically products that are **fast and easy** to consume (1.6x).

MOTIVATION DIAGRAM: Black American Boomers



N=895

 Top 3 Motivations

↑ ↓ Variations against Black Americans

A close-up, slightly blurred photograph of several granola bars in a white paper container. The bars are golden-brown and studded with nuts and dried fruit. The lighting is soft, highlighting the texture of the granola.

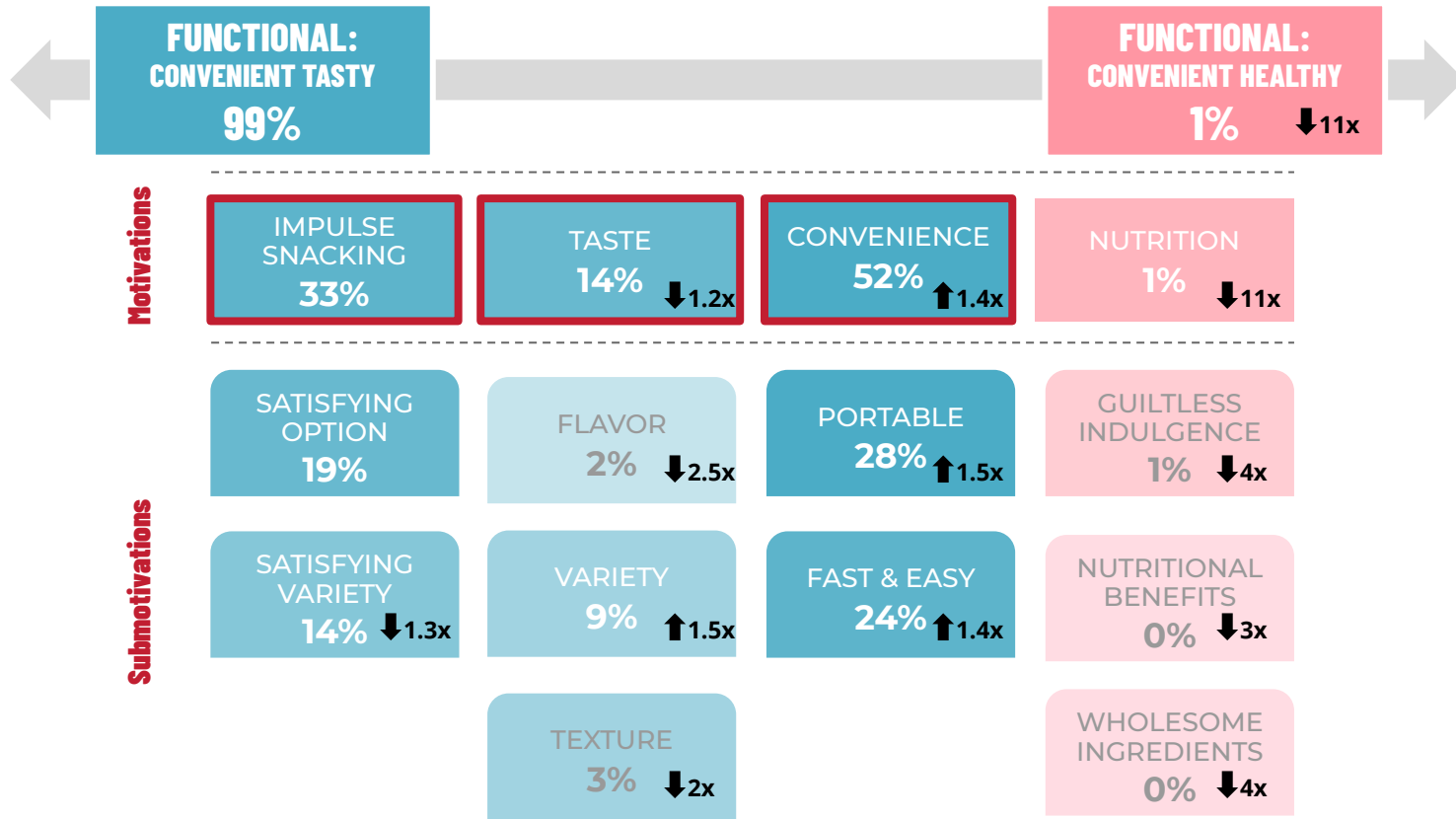
3

How does **aging** impact consumer behavior for **Hispanics**?

Hispanic Boomers are driven by convenience (52%), impulse snacking (33%), and taste (14%).

For Hispanic Boomers, aging impacts consumer behavior in snack bars, because they focus 11x less on health and nutrition. Instead, they focus more on **portability** (1.5x), **variety** (1.5x), and products that are **fast and easy** to consume (1.4x).

MOTIVATION DIAGRAM: Hispanic Boomers





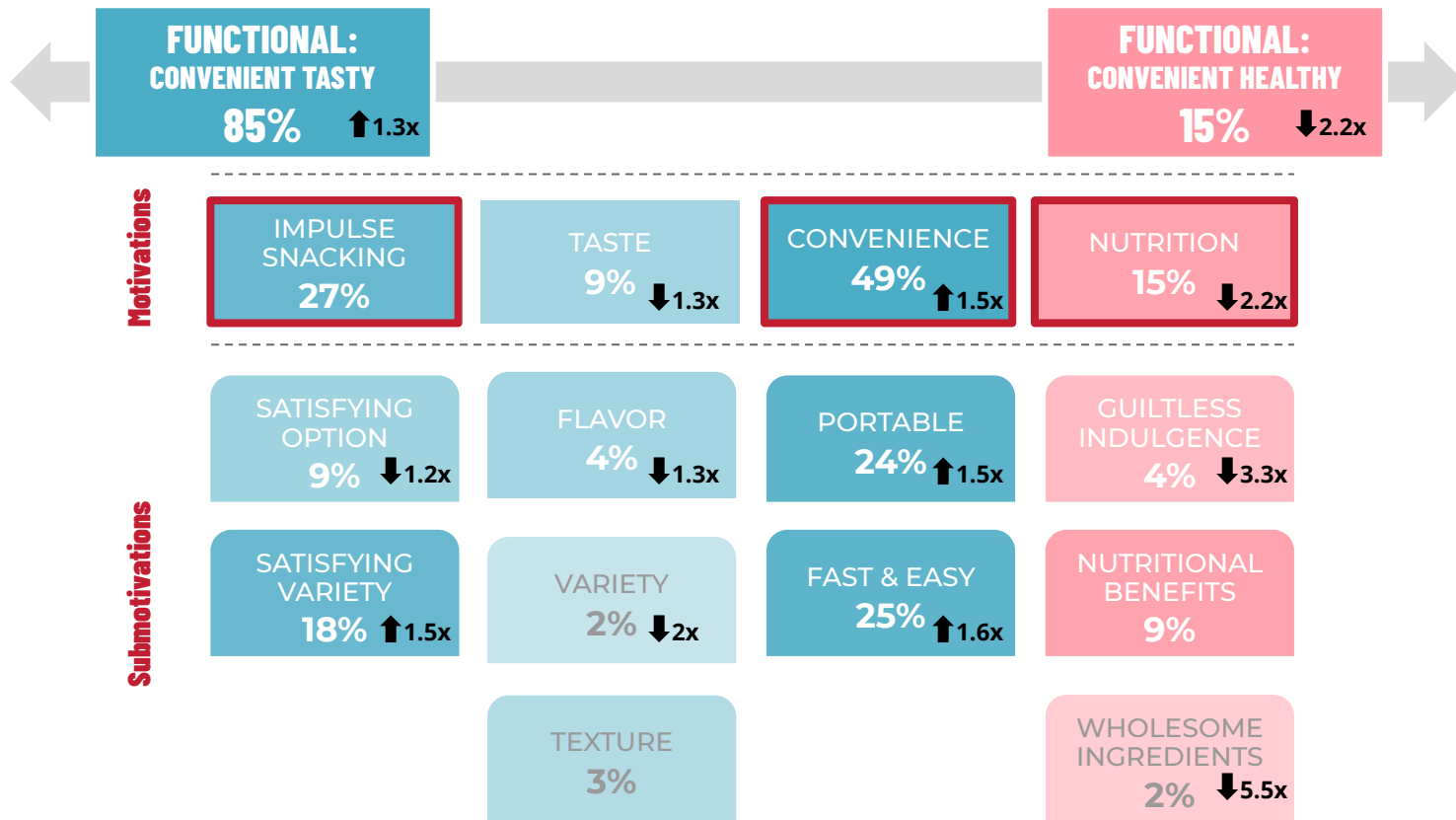
3

How does **aging** impact consumer behavior for **Asian Americans**?

Asian Americans Boomers are driven by **convenience (49%)**, **impulse snacking (27%)**, and **Nutrition (15%)**.

They focus 1.3x more on **convenient indulgence**, especially products that are **fast and easy** to consume (1.6x), **satisfying variety** (1.5x) and **portability** (1.5x).

MOTIVATION DIAGRAM: Asian American Boomers





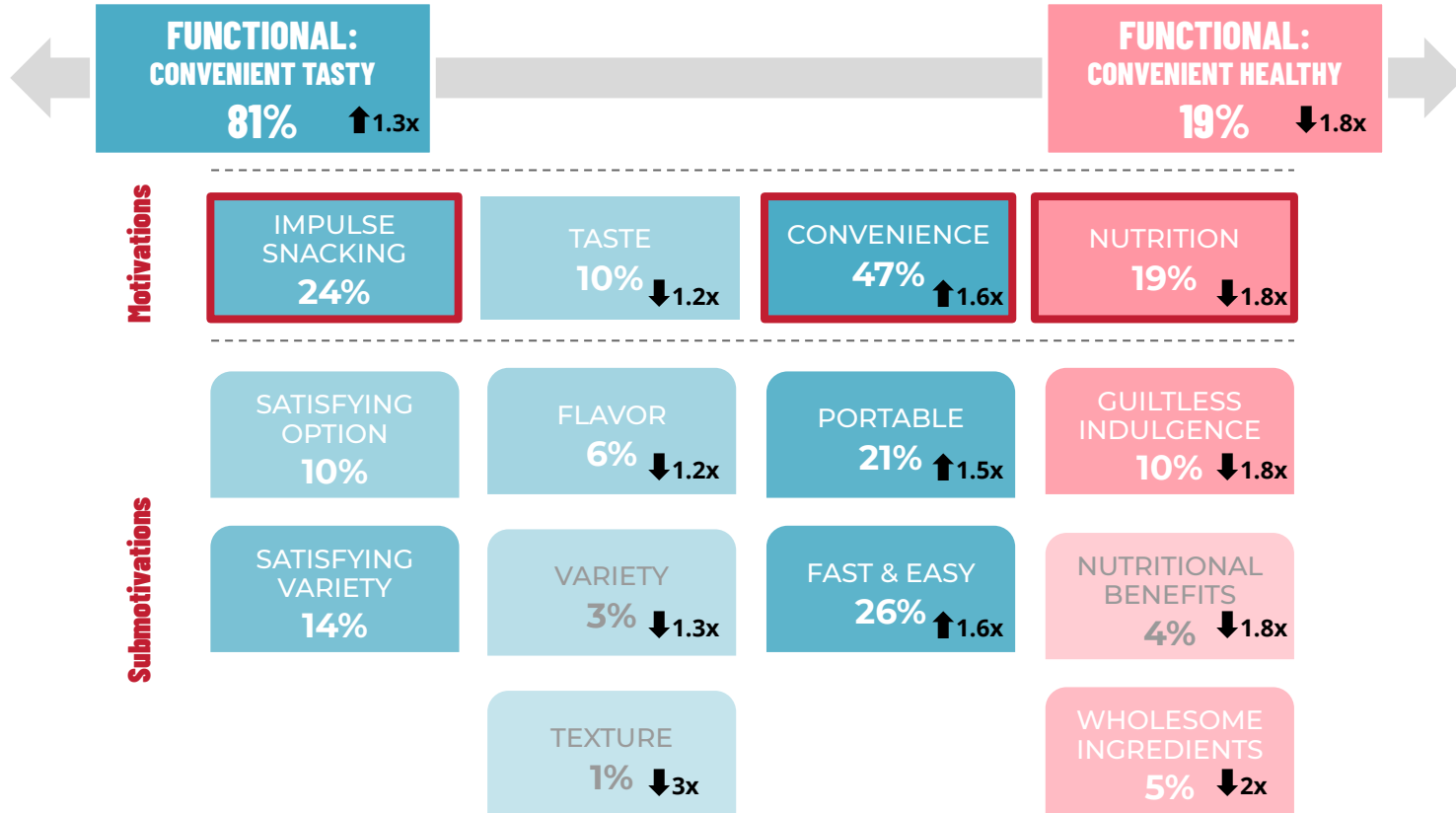
3

How does **aging** impact consumer behavior for **LGBTQ**?

LGBTQ Boomers are driven by convenience (47%), impulse snacking (24%), and nutrition (19%).

They focus 1.3x more on **convenient indulgence**, especially products that are **fast and easy** to consume (1.6x), **satisfying variety** (1.6x) and **portability** (1.5x).

MOTIVATION DIAGRAM: LGBTQ Boomers



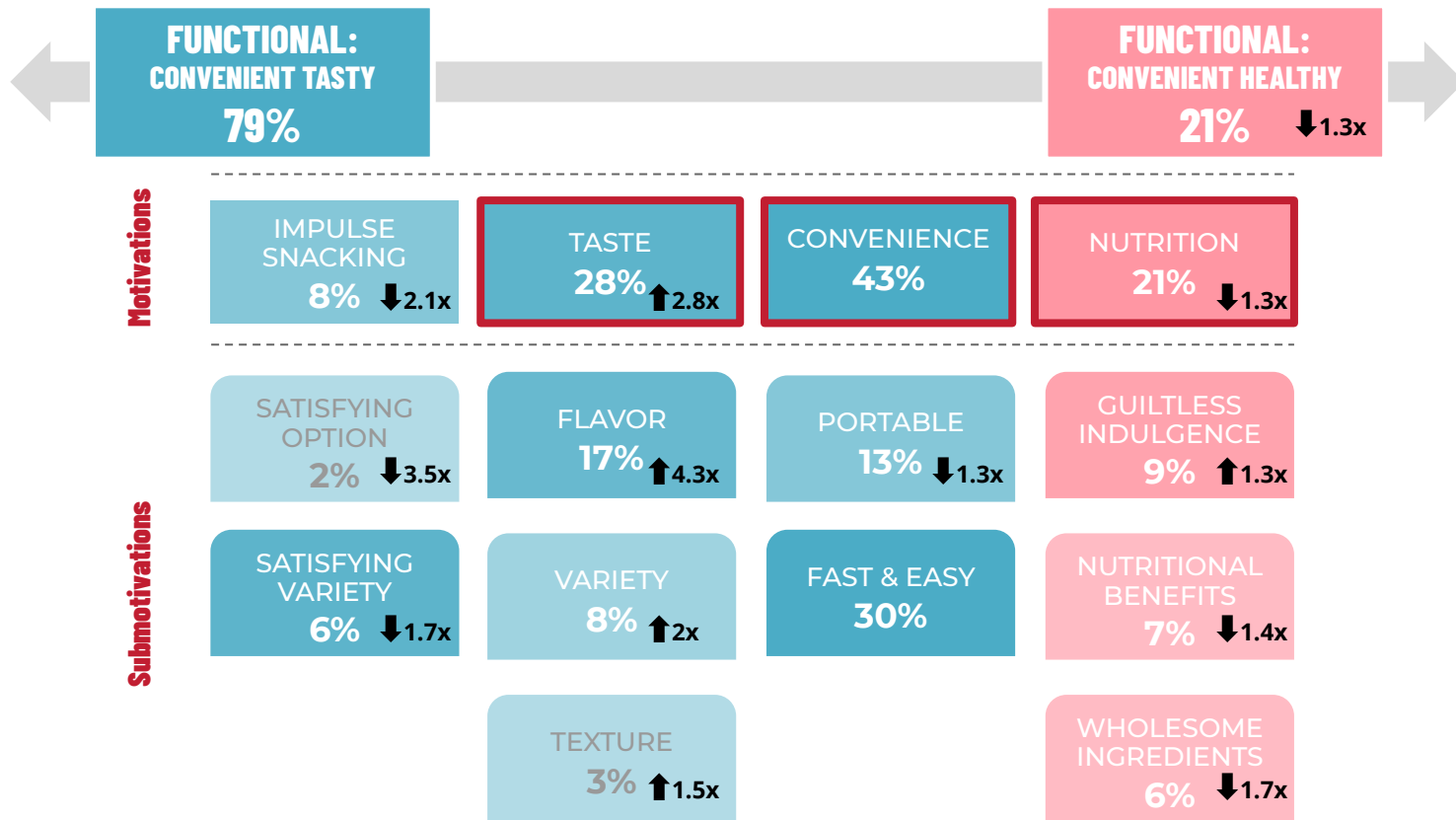
3

How does **aging** impact consumer behavior for **People With Disabilities**?

Boomers with disabilities are driven by **convenience (43%)**, **impulse snacking (28%)**, and **nutrition (21%)**.

They focus on convenience like other segments, but give more importance to **taste (2.8x)**, especially **flavors (4.3x)**, but also **variety (2x)** and **texture (1.5x)**. They also value **guiltless indulgence (1.3x)**.

MOTIVATION DIAGRAM: Boomers Living with Disabilities





Appendix



Definition of the Snack Bars/Toaster Pastry Category

Category	Parent
Snack Bars	KELLOGG CO, GENERAL MILLS INC, CLIF BAR & CO, KIND LLC, PEPSICO INC
Toaster Pastry	KELLOGG CO, GENERAL MILLS INC

Definition of the Snack Bars/Toaster Pastry Category

Product Category	Parent	Brand
Snack Bars	CLIF BAR & CO	CLIF BAR
Snack Bars	GENERAL MILLS INC	FIBER ONE
Snack Bars	GENERAL MILLS INC	LARABAR
Snack Bars	GENERAL MILLS INC	NATURE VALLEY
Toaster Pastry	GENERAL MILLS INC	PILLSBURY TOASTER STRUDEL
Snack Bars	KELLOGG CO	KASHI
Snack Bars	KELLOGG CO	NUTRI-GRAIN
Toaster Pastry	KELLOGG CO	POP-TARTS
Snack Bars	KELLOGG CO	RICE KRISPIES TREATS
Snack Bars	KELLOGG CO	RXBAR
Snack Bars	KIND LLC	KIND BAR
Snack Bars	PEPSICO INC	QUAKER BREAKFAST BAR
Snack Bars	PEPSICO INC	QUAKER CHEWY
Snack Bars	CLIF BAR & CO	CLIF BAR
Snack Bars	GENERAL MILLS INC	FIBER ONE
Snack Bars	GENERAL MILLS INC	LARABAR

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