

Igniting Open-Ends To Illuminate Snacking Behaviors

Case Study #2, November 2011

Agenda

Study Goals

Our Business Problem

Using Online Qualitative

Results

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What we're covering in this case study

- 1** What makes certain snacks “sticky”?
- 2** How do we improve the way we find out?

Are snacks important, umm yes!

90% of Americans Snack Daily



75% Eat Breakfast
88% Eat Lunch
96% Eat Dinner

The Biggest Snack Food Stadium
Ever, according to HolyTaco.com (3
foot by 2 foot)

Defining snacking

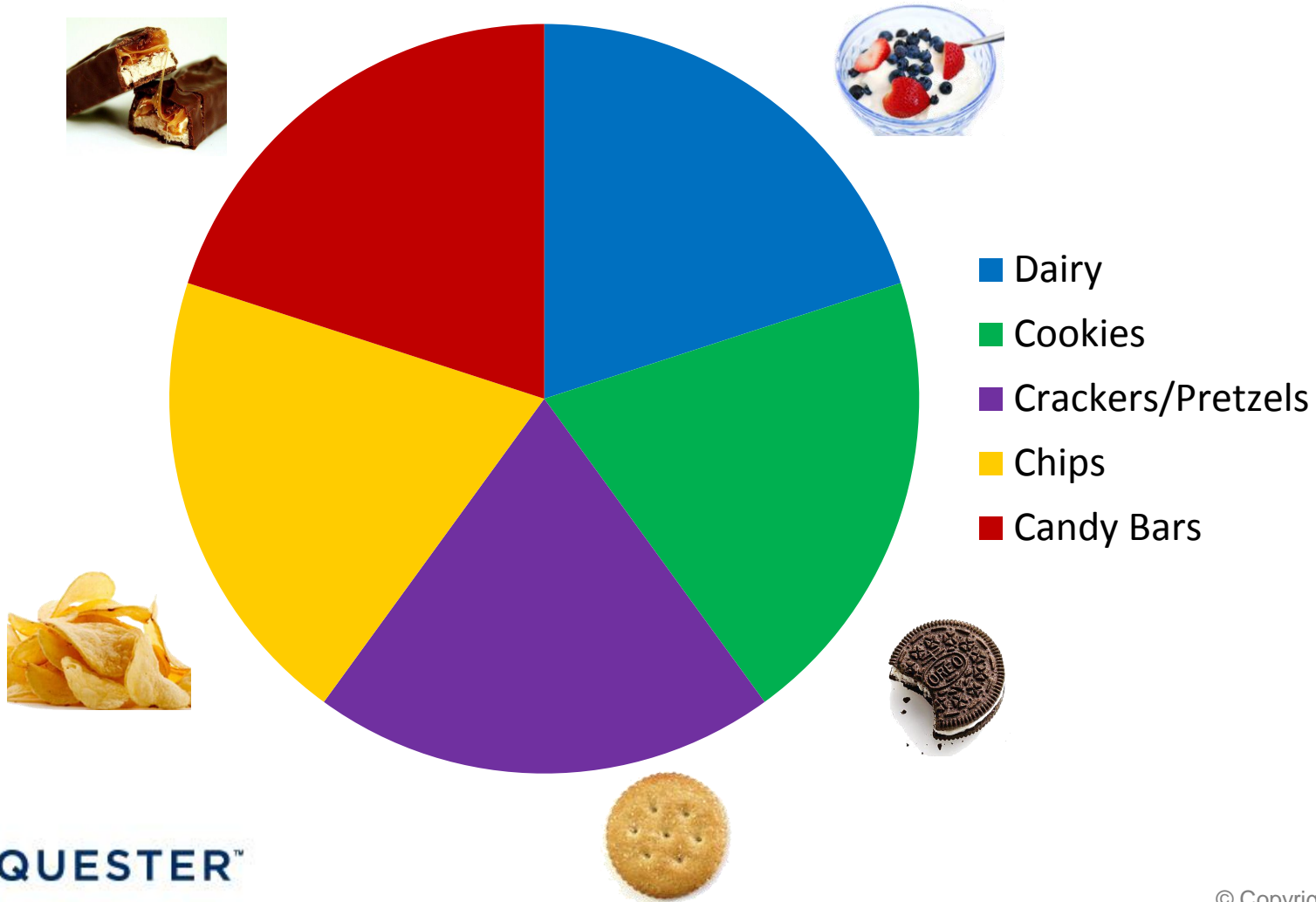
But, what is a “snack”?



20% Consumers define traditionally

40% Retailers define traditionally

So, in our exercise we wanted a blend



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What we're covering today

1

What makes certain snacks “sticky”?

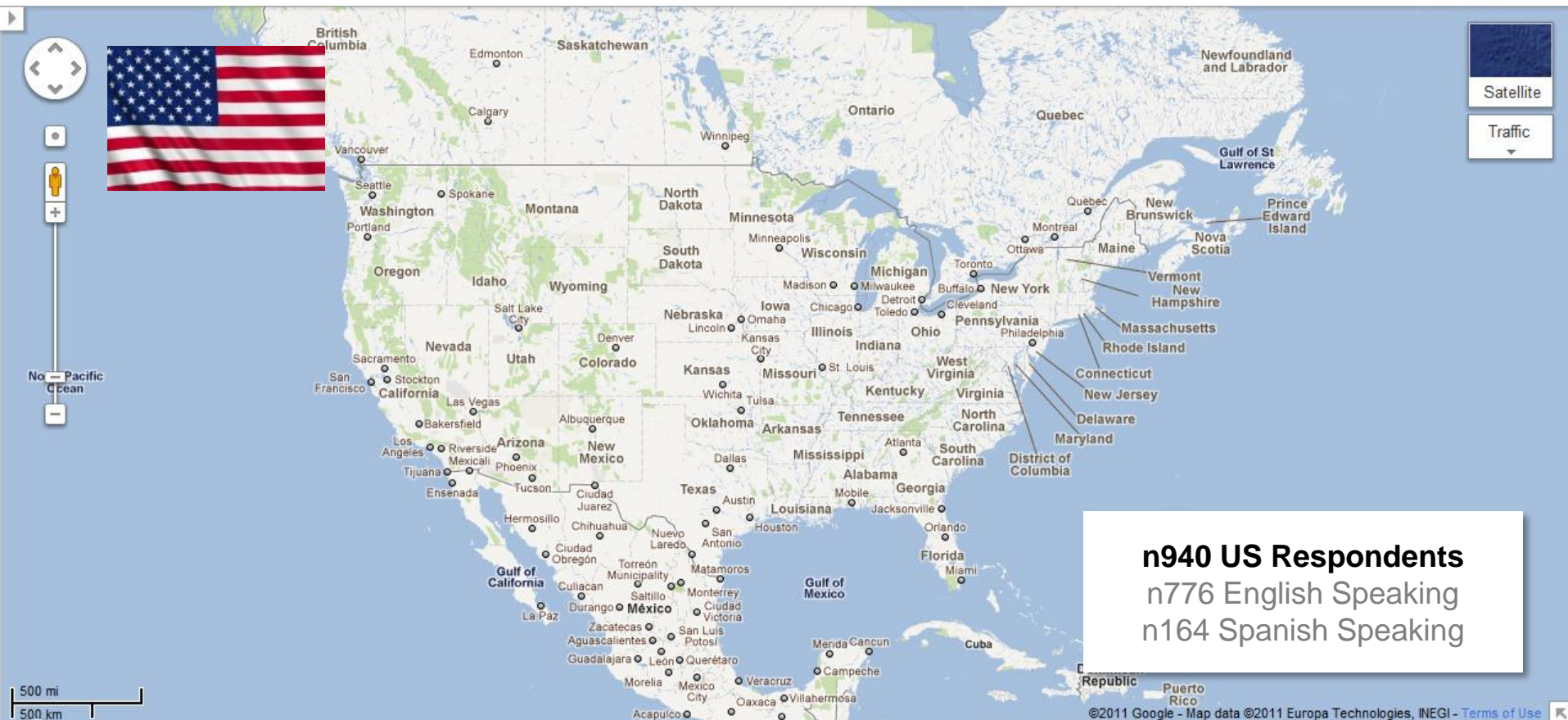
2

How do we improve the way we find out?

Sample & Location

Age: 18-65, n940

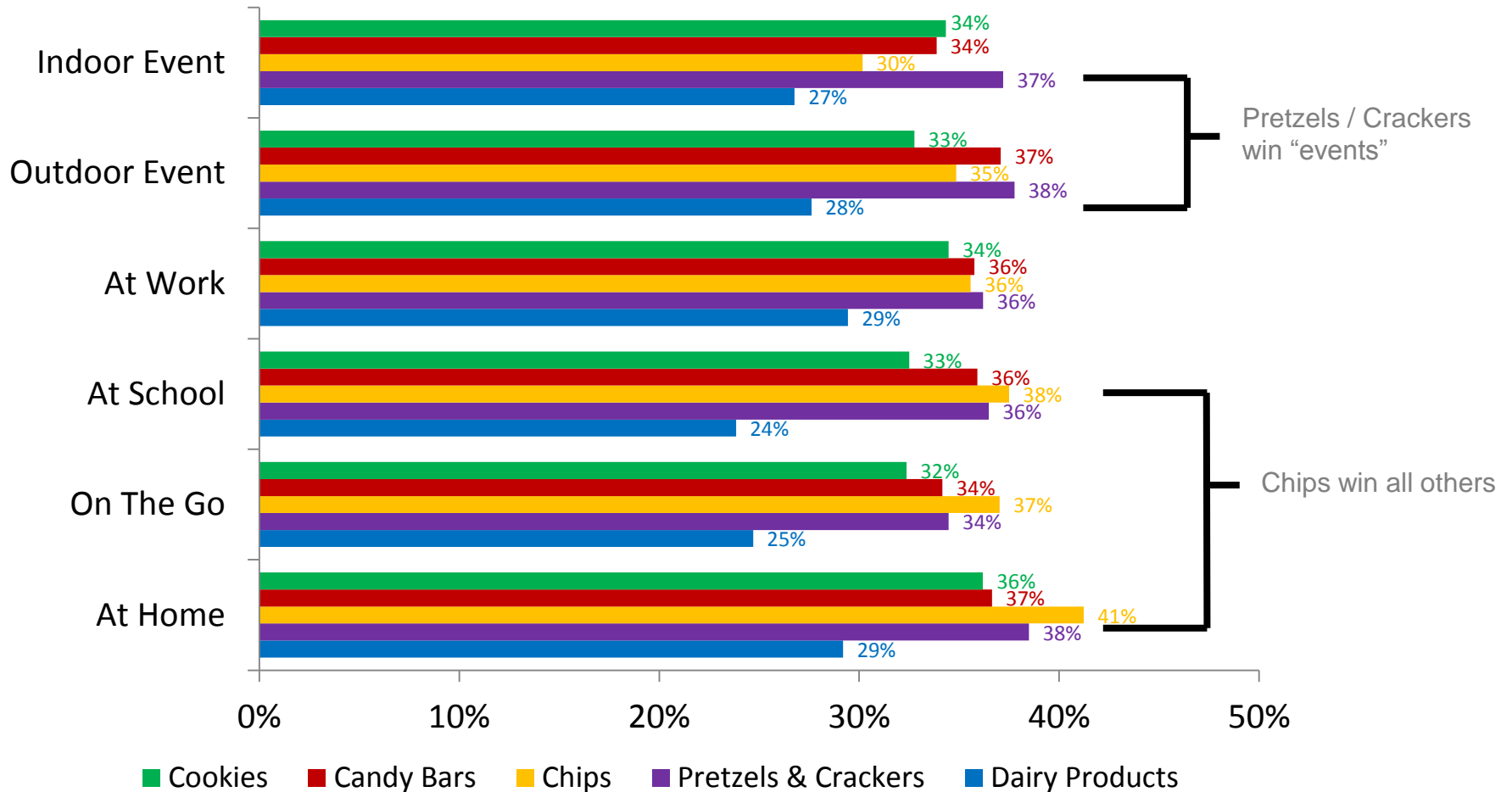
Purchase dairy, pretzels/crackers, chips, cookies or candy bars as a snack in past three months



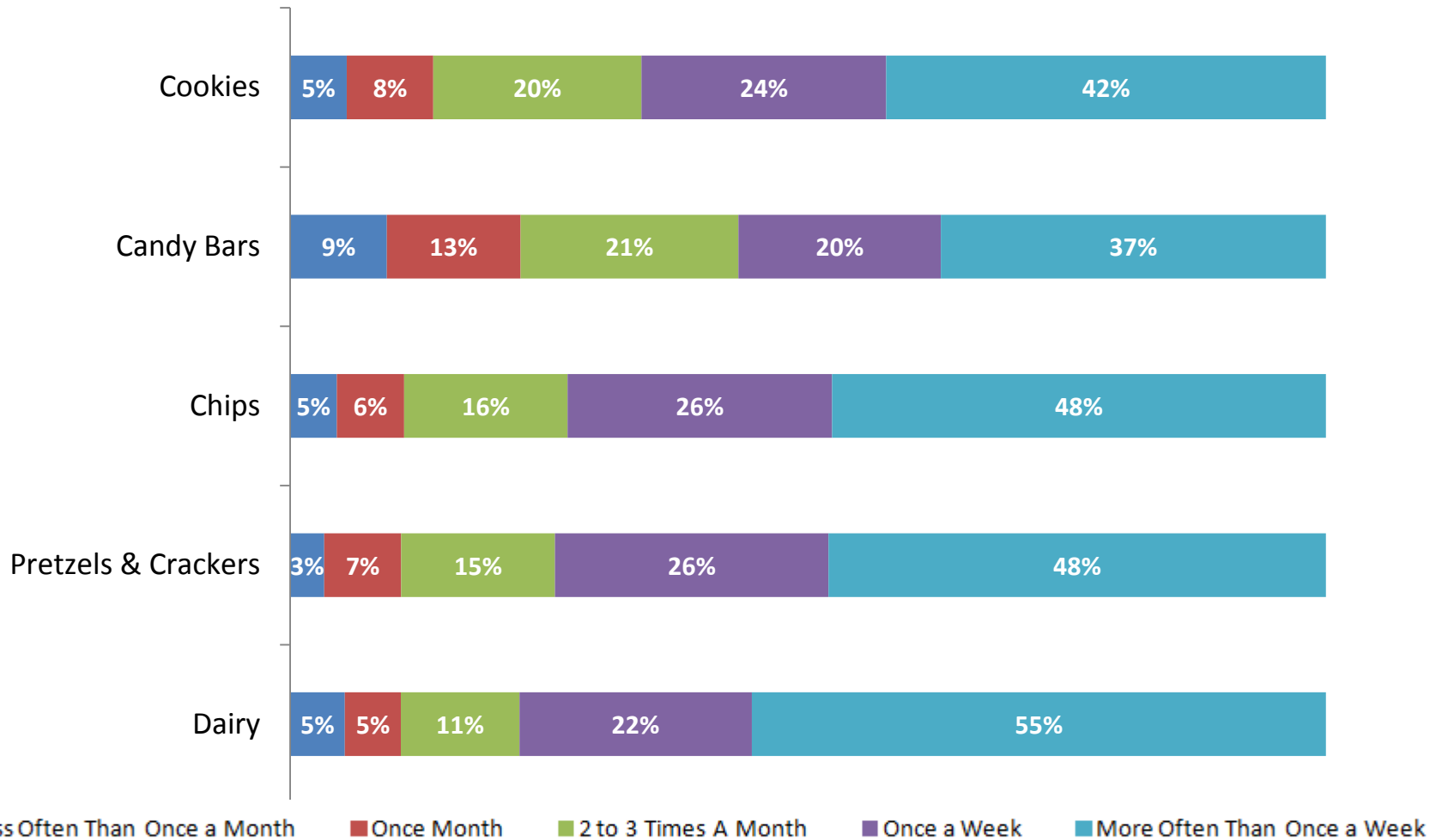
Get a good quant read

Snack Category	Dairy	Cookies	Pretzel & Crackers	Chips	Candy Bars
Tastes good	1.47	1.71	1.76	1.73	1.71
Is consistently high quality	1.35	1.56	1.60	1.56	1.48
Is good value for the money	1.41	1.45	1.55	1.60	1.54
Is reasonably priced	1.38	1.45	1.62	1.62	1.54
Is something my whole family likes	1.23	1.40	1.30	1.38	1.34
Made by a brand I trust	1.19	1.36	1.23	1.32	1.39
Is available in a variety of flavors	1.23	1.13	1.16	1.23	1.11
Is a special treat for me/my family	0.98	1.13	0.93	1.05	1.29
Packaging is easy to open	0.87	1.13	0.95	0.99	0.94
Is often on sale/deal	1.12	1.12	1.23	1.34	1.42
Is easy to store	1.05	1.12	1.16	1.04	1.08
Is sweet	0.71	1.11	0.56	0.69	1.35
Is available in store brand(s) I/my family like(s)	1.10	1.07	1.18	1.13	1.14
Is good for anytime of the day	1.13	1.05	1.35	1.18	1.18
Is portable/can take on the go	0.93	1.03	1.04	0.99	1.22
Is available in multiple package sizes	0.84	0.99	0.69	0.73	0.94
Is easy to carry/portable	0.88	0.99	1.02	0.90	1.08
Is not made with artificial ingredients	1.00	0.88	0.70	0.78	0.68
Is healthy/nutritious for me/my family	1.20	0.81	1.02	0.91	0.74
Is low in fat	1.03	0.81	1.00	0.84	0.68
Has vitamins & minerals	1.06	0.81	0.67	0.78	0.74
Is available in single serve sizes	0.94	0.79	0.53	0.69	1.08
Is low in calories	1.01	0.77	0.90	0.76	0.63
Is low in sugar	1.00	0.73	0.93	0.74	0.58

Snacking Consumption



Snack Frequency



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Case Study – Survey Methodology

Method: Online Quant/Qual interviews

Standard

Probed

Story

1

Overall, what do you and your household like about [insert brand name]?

2

What do you and your household dislike about [insert brand name], if anything?

1

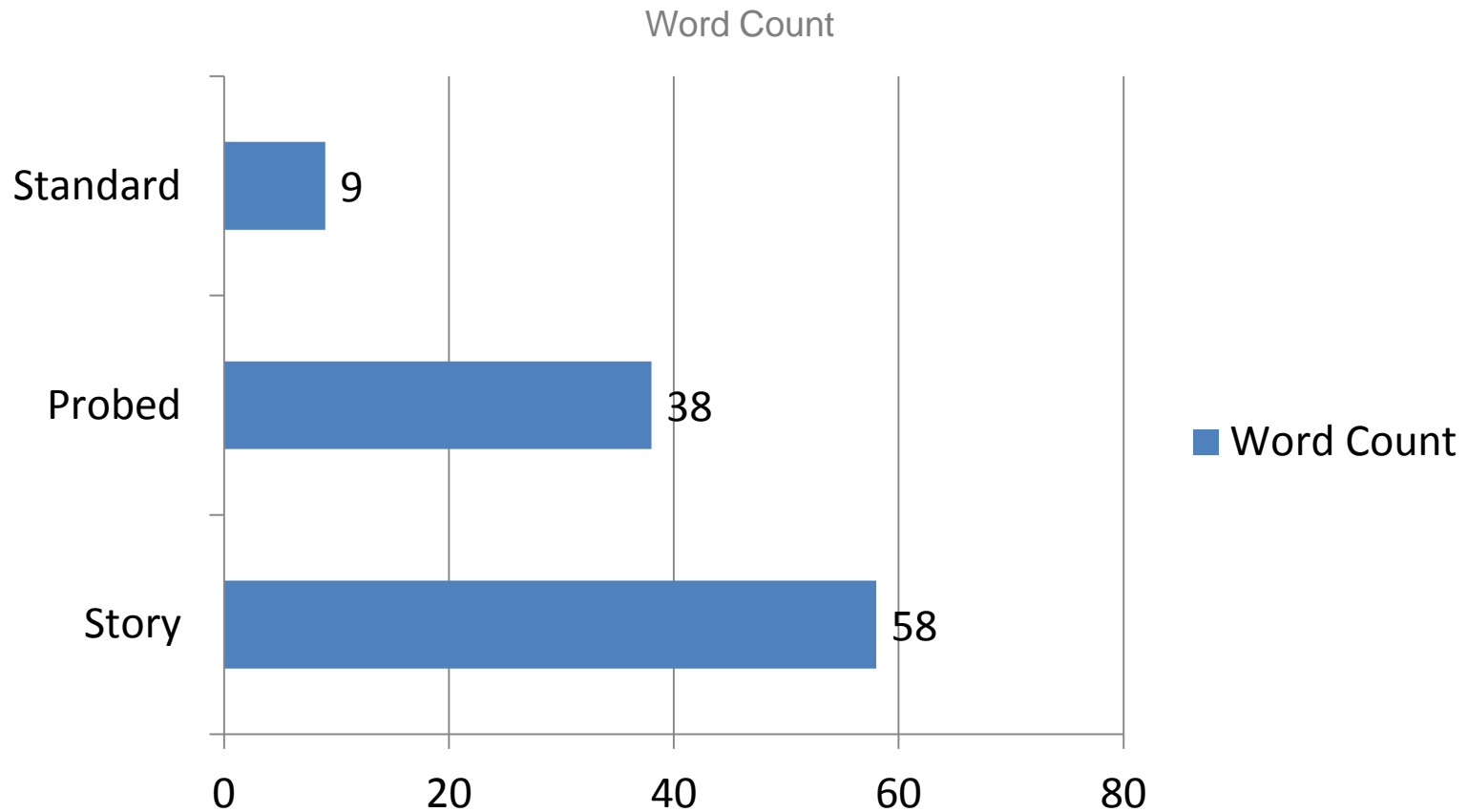
I want to make sure I have a good understanding of what your experience with this brand is like. So I would like you to tell me a story about your experience with this brand, one that is the best example of what it is like for you.

2

Now I would like you to take a moment and think about your experience with this brand - if there is something that you could change about it to make it even better for you, what would that be ...? Tell me in detail what specifically you would change or improve about this brand

Case Study – The Numbers

Average Number of Words

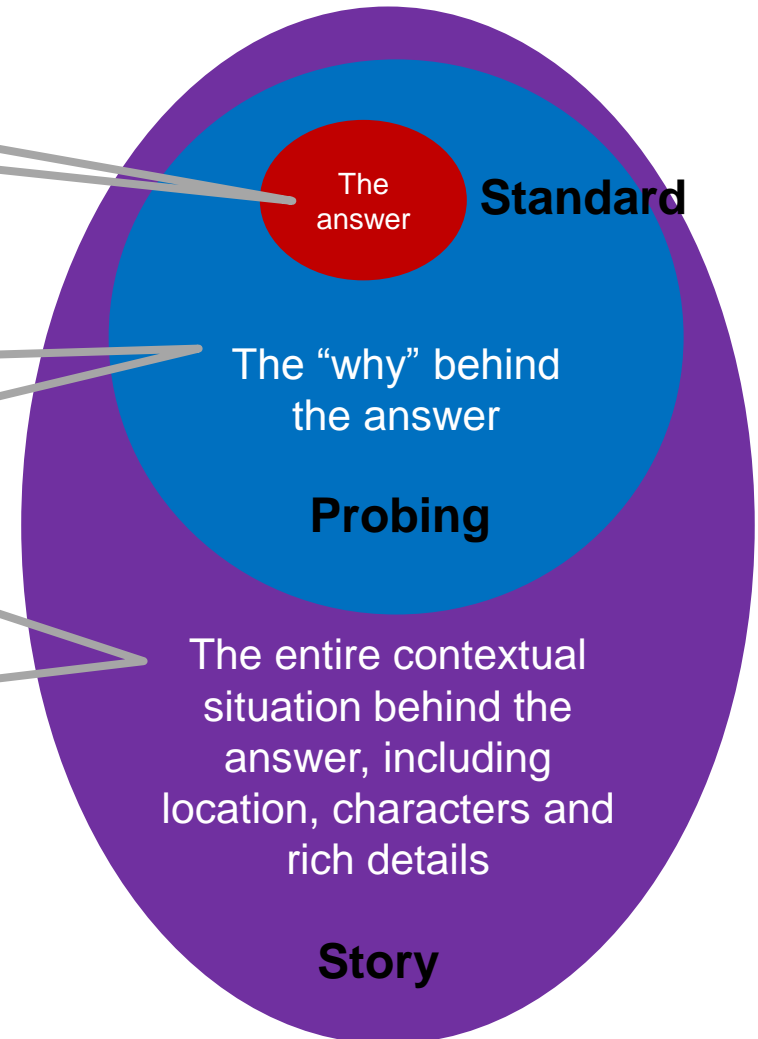


Case Study – The Value of Probing

The chocolate caramel.

I love the caramel and the chocolate blend. It is just the perfect thing to snack on. The taste and texture. I will pay anything just to have a Milky Way when I crave it

I usually have great experiences with the Mars Milky Way brand. The candy is usually gooey and soft like it should be. Very rarely do I get a candy bar that is stale. I love the candy because it reminds me of Halloween as a kid. Well we always shared the treats that we got for Halloween between the kids in our family, often the chocolate was the first to disappear from the bowl and often I chose the Milky Way above all because I love the caramel.



Case Study – The Value of Probing

Key Themes & Ideas	Standard	Probed	Story
n	259	261	261
Taste	69%	77%	65%
Health	12%	18%	18%
Price/Value	12%	17%	17%
Texture	7%	17%	15%
Emotions	2%	8%	27%
Variety & Selection	8%	16%	11%
Quality	12%	10%	8%
It Is Convenient	7%	10%	11%
My Family	3%	8%	16%
Shopping Channel	0%	3%	10%
Packaging	3%	5%	4%
It Is Our Favorite	1%	3%	7%
It Is Filling	0%	2%	3%
Brand Associations	0%	0%	1%

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3 Things you should know about snacking

1

- Snacking “connects” you

2

- There is a craving spectrum

3

- Guilt is at the center of all snacking

Snacking “connects” you

Connects you to your family or co-workers at events



Connects you to your childhood



There is a craving spectrum



Ooooh, I'm craving me some ...

Basic Hunger

Quasi-Addiction

Guilt is at the center



How should I deal with guilt

Avoid feeling guilty

Embrace it, deal with it later

Snacking Summary

Dairy

Dairy Snacks are sweet treats with healthy perks; good for digestive health

Cookies

Brand loyalty starts at childhood

Crackers & Pretzels

Pretzels & Crackers are snacks you feel less guilty about eating.

Chips

Flavor & variety make chips a great “comfort food.”

Candy Bars

Candy bars are like a drug.

Dairy

Dairy Snacks are sweet treats with healthy perks.

Products & Brands Mentioned

Products: Yogurt, gogurt, ice cream, cheese (string cheese), smoothies, popsicles

Brands: Yoplait, Dannon, Haagen Dazs, Kraft, Turkey Hill, Ben & Jerry's, Breyer's, Trader Joes



Dairy Insights

Sweet, low cal treats:

"I love trader Joes mocha and chocolate yogurt. A container has a reasonable 130 calories."

Healthy "supplement" any time of day:

"It is healthy with a good source of calcium and other nutrients your body needs."

Digestive health (not just Activia):

"Yogurt is good for your digestive system"

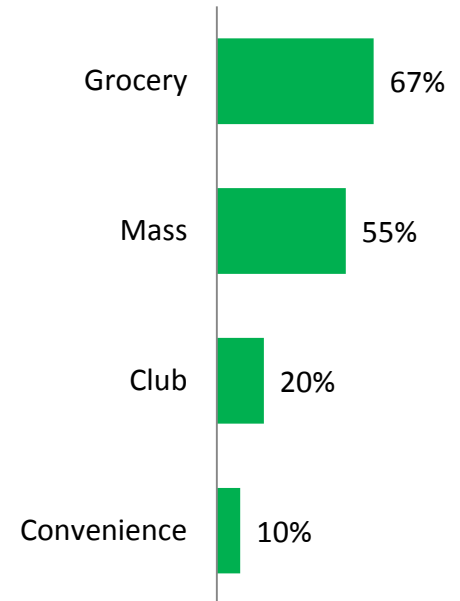
Range of flavors:

"Yoplait had more flavors that sounded like they could hit the spot than all the other brands."

Rich, creamy taste-texture:

"I bought dryer's double vanilla ice cream. It was smooth, creamy, and delicious just like we like it."

Channel



Changes/Improvements:

- **Packaging** – attach spoon
- **Ingredients** – include "all natural" (fruits, sweeteners)

Cookies

Brand loyalty starts at childhood.

Products & Brands Mentioned

Brands: Oreos (double stuffed, holiday themed, bite size). Chips Ahoy, Keeble



Dairy Insights

Consistent taste since childhood:

“Oreos have been loved in my family for a long time. Even when I was a kid we loved to eat Oreos.”

Great for dunking, baking, or topping:

“They are great dipped in milk or crunched up and used as an ice cream topping.”

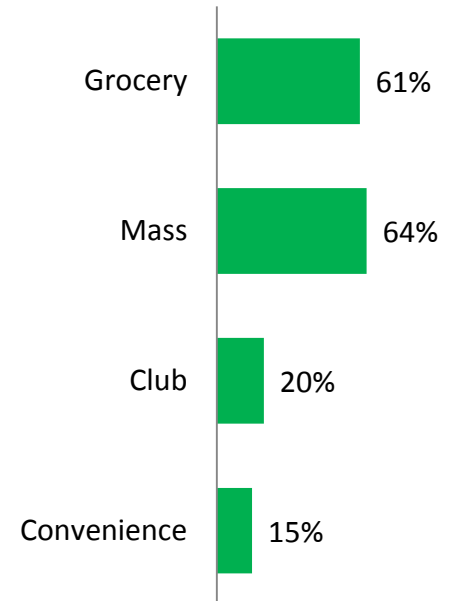
Spoil Children:

“I bought the bite sized Oreos when my grandson was visiting ... these are great for him to snack on. He likes to have a treat when he finishes eating lunch or dinner and I can give him a small bowl with several in it and he is completely satisfied.”

Off brands can't compete:

“There are cookies similar to Oreos that are just not good. They taste strange and crumble strange.”

Channel



Changes/Improvements:

- Available in low/less sugar
- Better packaging for bite sized cookies – avoid breaking/crumbling

Crackers & Pretzels

Pretzels & Crackers are snacks you feel less guilty about eating.

Products & Brands Mentioned

Brands/Products: Ritz, Snyder's, Cheez-It, Cheese nips, Wheat thins, Garden of Eatin' crackers



Dairy Insights

Less guilt comes from healthy fiber, whole wheat, and low fat options:

"It's high fiber and whole wheat which is something I look for."

"I needed a low calorie snack and desired something salty."

Taste great with dips & toppings, or just "plain"

"I eat Ritz because they taste good, I can add cheese or eat them plain."

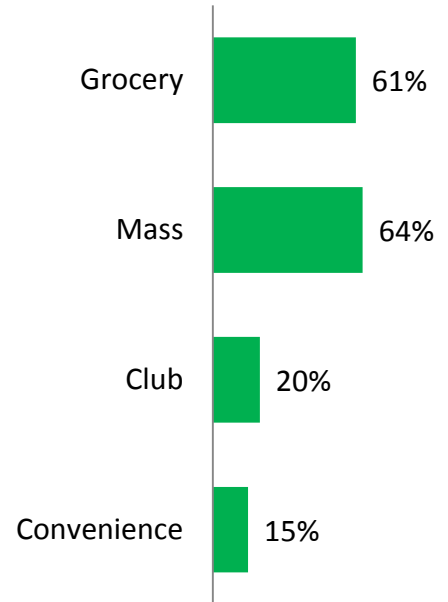
Perfect salty proportion:

"I love Cheez-It because they taste so cheesy and they have just the right amount of salt."

Taste & texture variety:

"I like the different types of pretzels. I like the mini ones, but sometimes I like the rods."

Channel



Changes/Improvements:

- More flavor varieties in low cal options

Chips

Flavor & variety make chips a great “comfort food.”

Products & Brands Mentioned

Flavors: barbecue, nacho cheese, cool ranch, jalapeno, ranch, chili cheese, french onion, garden salsa, salt & vinegar

Brands: Lays, Doritos,



Dairy Insights

A good balance of flavors & varieties I like:

“Pringles carry so many different types of flavors like salt and vinegar, ranch, barbeque, sweet and spicy.”

“The chips are thin, flavorful and have the right amount of salt and BBQ flavor.”

Easy to dip:

“I like the scoops because I can stuff them with my home made tuna salad.”

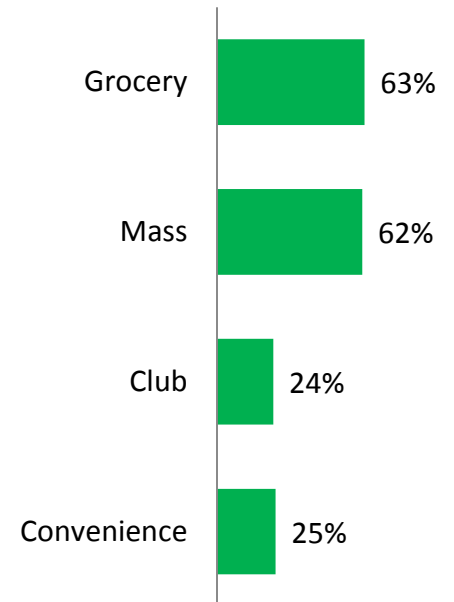
Crisp texture:

“I enjoy the Lay’s Baked Ruffles. They’re all natural, light , and crispy.”

Great for all occasions or a snack on the go:

“It’s a snack of importance in outdoor or indoor events. It brings a sense of gathering.”

Channel



Changes/Improvements:

- A higher chip/package ratio
“It’s disappointing to feel the heaviness of the bag and open the bag and notice that only half of it’s density was just air”

Candy Bars

Candy bars are like a drug.

Products & Brands Mentioned

Products/Brands: Twix, Snickers, Kit Kat, Hershey's, M & M's (peanut), Paydays, Three Musketeers, Milky Way



Dairy Insights

Tastes are addicting:

"I get cravings and only one thing can cure that, and that would be chocolate."

Quick/convenient treat:

"I carry one for a snack if I get hungry while shopping."

Fights Hunger and low blood sugar:

"I bought a snickers to hold me until I could eat later in the day. It tasted great and held off my hunger."

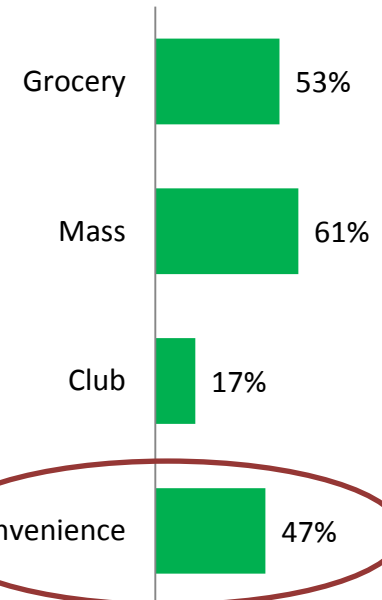
Great flavor combos & textures:

"I love caramel and peanuts, it's sweet and salty so that fulfills both of my wants."

A treat since childhood:

"This brand has always been around since I was a kid and I love it."

Channel



Changes/Improvements:

- "If you could decrease the calories or fat content without changing the taste then do it."
- No gray candy at convenience stores

What we've covered today

1

What makes certain snacks “sticky”?

It depends on the snack, and your family and how you want to feel

2

How do we improve the way we find out?

Talk to people about their personal experiences

For additional information

Contact us at info@quester.com or visit www.quester.com

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