



Shopper dynamics: Snack bars

Shopper profiles, cross-shop,
fulfillment, and retailer
strengths/opportunities

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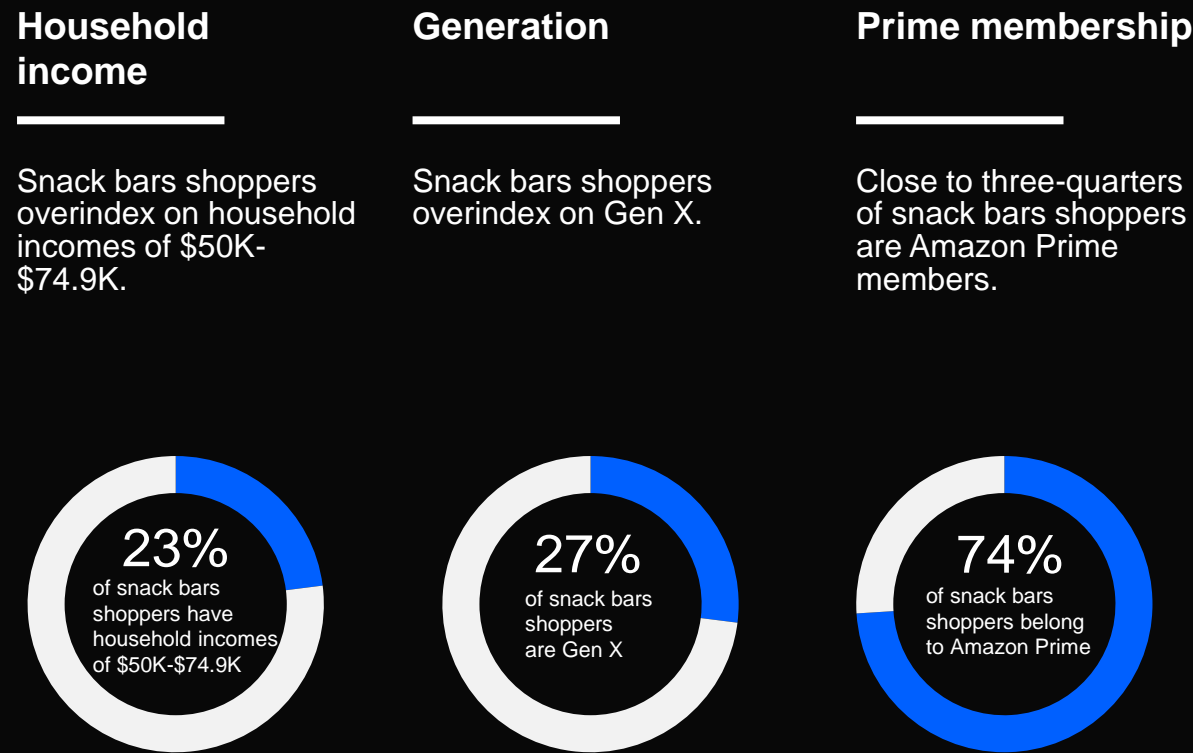
Snack bars: Key shopper dynamics takeaways

- Snack bars shoppers overindex among those with middle household incomes, Gen X, and Amazon Prime members.
- The mass, dollar, and online channels capture the most shoppers and spend in that category.
- Each retailer has a role in the snack bars category:
 - **Walmart:** Lower everyday prices and familiarity of shopping there
 - **Dollar Tree:** Specific items/brands and better sales and promotions
 - **Dollar General:** Lower everyday prices and speed of shopping
 - **7-Eleven:** Speed of shopping and private label products
 - **Target/SuperTarget:** Customer service and high-quality assortment

1 Snack bars shopper profile



Snack bars shoppers skew middle HHI, Gen X, and Amazon Prime members



Snack bars shopper demographic profile

		All shoppers of edible groceries	Snack bars shoppers
HH income	<\$25K	16%	20%
	\$25K-\$49.9K	21%	26%
	\$50K-\$74.9K	16%	23%
	\$75K-\$99.9K	13%	12%
	\$100K+	34%	20%
Generation	Gen Z (born after 1996)	10%	9%
	Millennials (born 1979-96)	33%	35%
	Gen X (born 1965-78)	21%	27%
	Boomers (born 1946-64)	32%	27%
	Matures (born before 1946)	5%	4%
Ethnicity	White non-Hispanic	65%	77%
	Black non-Hispanic	12%	15%
	Hispanic	16%	21%
Residence	Rural/small town	30%	31%
	Large town/suburb	48%	49%
	Urban/city	22%	21%
Gender	Male	47%	47%
	Female	52%	53%
Amazon Prime members		63%	74%
Kids in household		35%	36%

Significantly < vs. all shoppers (95% confidence level)

Significantly > vs. all shoppers (95% confidence level)

Snack bars shoppers care about quality and price rather than trying new products

ShopperDNA Segments: Snack Bars Shoppers (among shoppers who purchased snack bars in past four weeks)

All shoppers		Snack bars shoppers: based on shopping priorities and approaches in general
Utilitarians	34%	35%
Explorers	18%	16%
Discerners	20%	22%
Researchers	14%	13%
Budgeters	14%	15%

Snack bars shoppers are more likely to be ...

- **Discerners:** Discerners care about value. To discerners, value is measured not just by price but by quality in exchange for price. Discerners are looking first for quality products and experiences and are willing to spend more for a better product. They want to understand that the product is truly a better buy if they are going to invest in it.

Snack bars shoppers are less likely to be ...

- **Explorers:** Explorers enjoy the treasure hunt. These shoppers want to be inspired by new products and experiences. They want to be wowed during their shopper journey and crave experiences that add to a trip. In-store and online shopping can help convince them to try new brands and products, which can capture incremental spend.

Snack bars shoppers want to enjoy shopping and connect with brands that reflect their values

Snack bars shoppers also value high-quality products while also sticking to a budget

What Matters to Snack Bars Shoppers When Shopping in General: Category Shoppers vs. All Shoppers (among shoppers who purchased snack bars in past four weeks)

Significantly < vs. all shoppers (95% confidence level)

Significantly > vs. all shoppers (95% confidence level)

	All shoppers	Snack bars shoppers
I tend to shop at retailers that provide a stress-free shopping experience	70%	83%
I think value is about what you get, not what you pay	64%	66%
I like to get my shopping done as quickly as possible	62%	68%
It's important to me to buy the highest-quality products I can afford	61%	70%
It's important for me to stick to a budget	58%	67%
I tend to do research before deciding what to buy	58%	55%
It's important to me to have fun/enjoy myself when shopping	57%	64%
I think shopping online is fun	53%	57%
I like to discover/try new things when shopping	53%	66%
My smartphone is an important tool for me as a shopper	53%	59%
I tend to shop at retailers and buy brands that reflect my values	48%	60%
I prefer to shop for/buy products online if I can	46%	48%
I like to connect with retailers and brands on social media	28%	33%

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Snack bars retailer selection

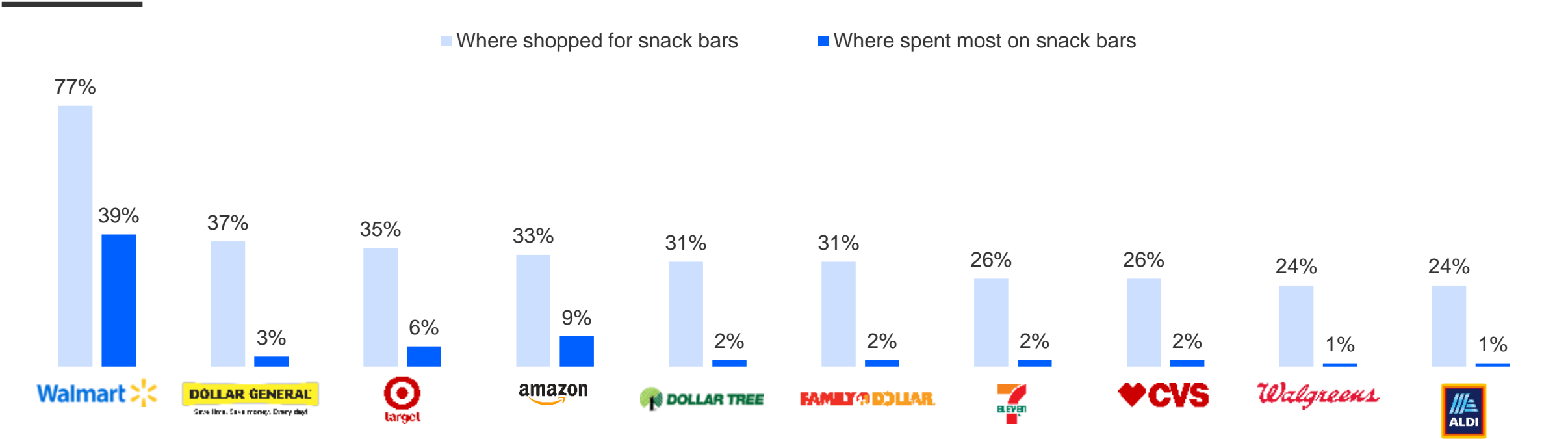


Walmart captures the highest number of snack bars shoppers and the most category spend

Remaining category retailers include a wide mix of dollar, mass, online, and convenience retailers

Top 10 Retailers Where Shoppers Shop for and Spend Most for Snack bars

(among shoppers who purchased snack bars in past four weeks)



Note: Walmart includes Walmart, WMSC, Walmart Neighborhood Market.

Snack bars shoppers shop across retailers, with the most leakage occurring across dollar, mass, and online

Where Retailers’ Past Four-Week Shoppers Also Shopped for Snack Bars
(among shoppers who purchased snack bars in past four weeks)

	Walmart	Dollar General	Target/ SuperTarget	Amazon.com	Dollar Tree	Family Dollar	7-Eleven	CVS	Walgreens	Aldi
Walmart	100%	92%	77%	80%	92%	89%	87%	75%	90%	81%
Dollar General	44%*	100%	41%	48%	66%	69%	44%	43%	67%	48%
Target/ SuperTarget	35%	38%	100%	49%	45%	41%	60%	57%	54%	38%
Amazon.com	34%	42%	46%	100%	39%	49%	60%	61%	58%	38%
Dollar Tree	37%	55%	41%	37%	100%	64%	48%	37%	63%	48%
Family Dollar	35%	57%	36%	46%	63%	100%	42%	45%	58%	40%
7-Eleven	29%	31%	45%	48%	40%	36%	100%	51%	44%	35%
CVS	25%	30%	42%	48%	31%	38%	50%	100%	50%	29%
Walgreens	28%	43%	38%	43%	48%	46%	40%	47%	100%	33%
Aldi	26%	31%	26%	28%	37%	31%	33%	28%	33%	100%

* Read as: Among Walmart snack bars shoppers, 44% also shop for snack bars at Dollar General.
Note: Walmart includes Walmart, WMSC, and Walmart Neighborhood Market.

In-store shopping is the most popular way to purchase snack bars across retailers

After Amazon, Walmart and Target show high rates of online fulfillment

How Shoppers Purchased From Retailer in Past Four Weeks

(among shoppers who purchased snack bars in past four weeks)

	Walmart	Dollar General	Target/ SuperTarget	Amazon.com	Dollar Tree	Family Dollar	7-Eleven	CVS	Walgreens	Aldi
Bought in store	83%	92%	88%	-	87%	93%	87%	80%	88%	81%
Bought online, in-store pickup	12%	3%	17%	19%	8%	7%	12%	8%	13%	6%
Bought online, curbside pickup	14%	3%	13%	11%	3%	5%	4%	10%	8%	4%
Bought online, items shipped from retailer	8%	4%	6%	52%	5%	3%	8%	4%	6%	2%
Bought online, same-/next-day delivery	14%	4%	7%	35%	-	2%	2%	4%	-	-

Note: Walmart includes Walmart, WMSC, and Walmart Neighborhood Market.

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Snack bars retailer motivations



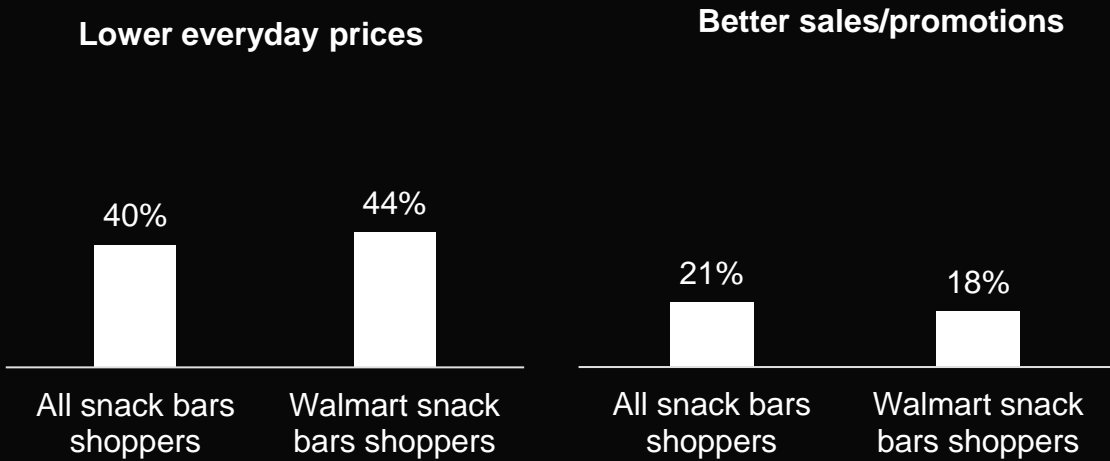
Reasons to shop snack bars at Walmart

Lower everyday prices

Similar to shoppers of other categories, snack bars shoppers choose Walmart for the lower everyday prices.

Better sales/promotions

Walmart snack bars shoppers don't perceive the retailer to have better sales and promotions compared with other retailers.



Why snack bars shoppers choose to spend the most at Walmart (among shoppers who purchased snack bars in past four weeks)

No statistical significance found

	All retailers	Walmart
Lower everyday prices	40%	44%
Familiar with shopping here/habit	36%	39%
Convenient place to buy this type of product	35%	37%
Can one-stop shop for many categories	26%	28%
High-quality products	26%	24%
Can get my shopping done quickly	22%	26%
Better sales/promotions	21%	18%
Good customer service	21%	20%
Pleasant shopping experience	20%	20%
Good assortment of organic/natural products	16%	16%
Specific items/brands I like available only at this retailer	14%	16%
Good private label products	14%	13%
Frequent shopper/rewards program	13%	11%
Only retailer where I live that sells this type of product	6%	7%

Note: Walmart includes Walmart, WMSC, and Walmart Neighborhood Market.

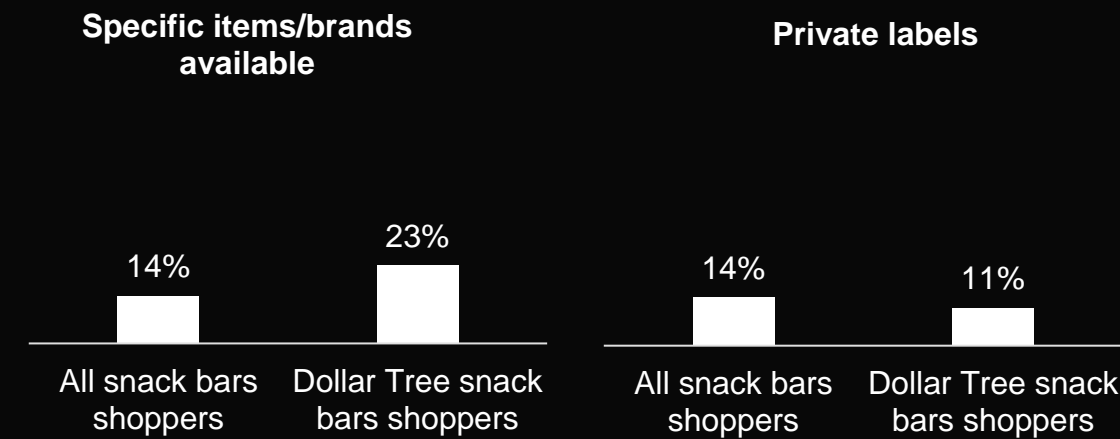
Reasons to shop snack bars at Dollar Tree

Specific items/brands

Snack bars shoppers turn to Dollar Tree for the specific items and brands it carries.

Opportunity to improve private label

Dollar Tree has an opportunity to improve its private label assortment.



Why snack bars shoppers choose to spend the most at Dollar Tree (among shoppers who purchased snack bars in past four weeks)

	All retailers	Dollar Tree
No statistical significance found		
Lower everyday prices	40%	39%
Familiar with shopping here/habit	36%	34%
Convenient place to buy this type of product	35%	29%
Can one-stop shop for many categories	26%	24%
High-quality products	26%	23%
Can get my shopping done quickly	22%	24%
Better sales/promotions	21%	24%
Good customer service	21%	24%
Pleasant shopping experience	20%	26%
Good assortment of organic/natural products	16%	18%
Specific items/brands I like available only at this retailer	14%	23%
Good private label products	14%	11%
Frequent shopper/rewards program	13%	21%
Only retailer where I live that sells this type of product	6%	10%

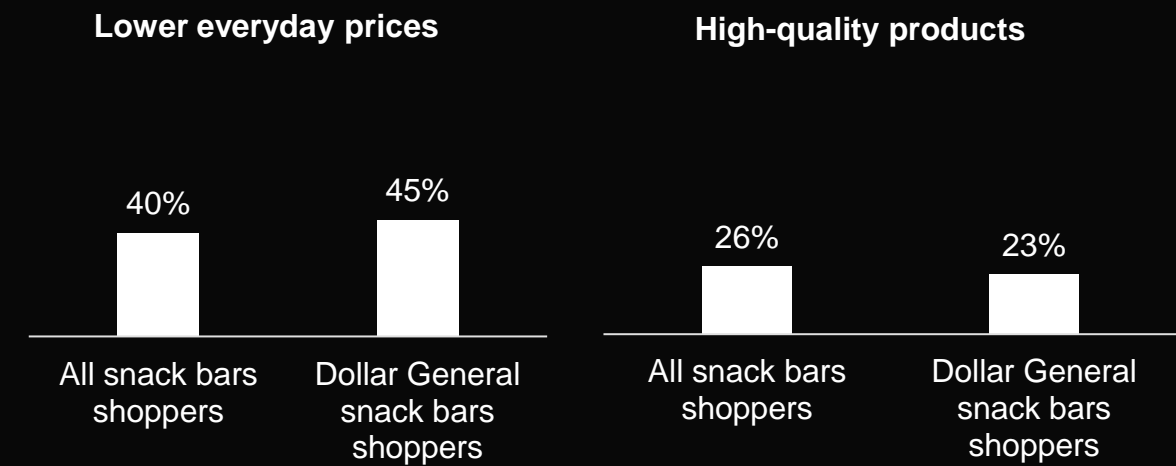
Reasons to shop snack bars at Dollar General

Lower everyday prices

Snack bars shoppers choose Dollar General for its lower everyday prices.

High-quality products

Snack bars shoppers have lower expectations for high-quality products at Dollar General than for other retailers.



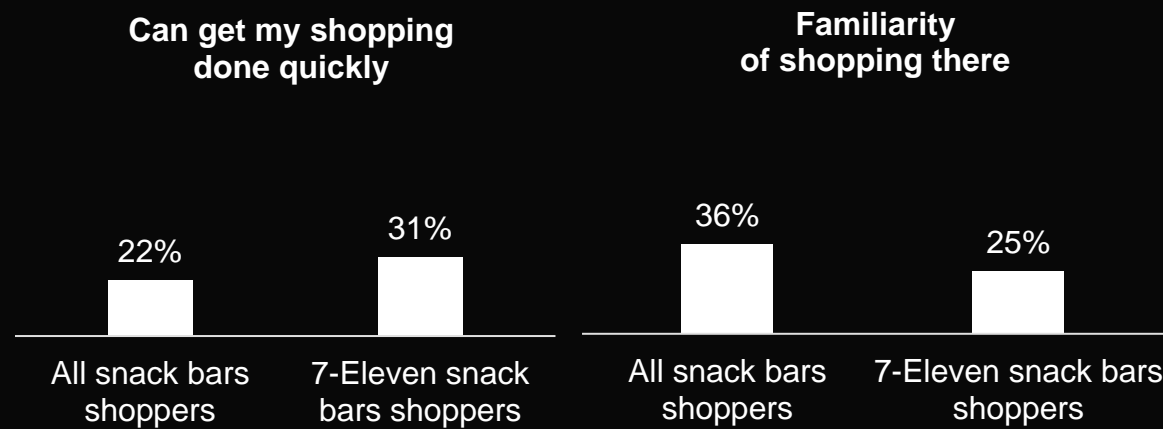
Why snack bars shoppers choose to spend the most at Dollar General (among shoppers who purchased snack bars in past four weeks)

	All retailers	Dollar General
No statistical significance found		
Lower everyday prices	40%	45%
Familiar with shopping here/habit	36%	35%
Convenient place to buy this type of product	35%	28%
Can one-stop shop for many categories	26%	27%
High-quality products	26%	23%
Can get my shopping done quickly	22%	30%
Better sales/promotions	21%	23%
Good customer service	21%	24%
Pleasant shopping experience	20%	24%
Good assortment of organic/natural products	16%	14%
Specific items/brands I like available only at this retailer	14%	15%
Good private label products	14%	12%
Frequent shopper/rewards program	13%	14%
Only retailer where I live that sells this type of product	6%	5%

Reasons to shop snack bars at 7-Eleven

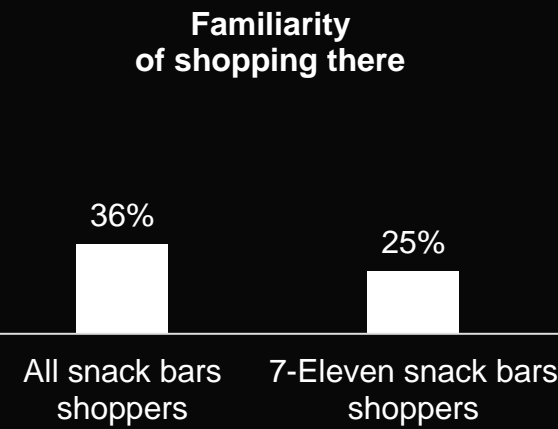
Quick shopping experience

Snack bars shoppers see 7-Eleven as a place where they can get their shopping done quickly.



Opportunity to increase familiarity of shopping there

7-Eleven has an opportunity to increase the familiarity of shopping there.



Why snack bars shoppers choose to spend the most at 7-Eleven (among shoppers who purchased snack bars in past four weeks)

	All retailers	7-Eleven
No statistical significance found		
Lower everyday prices	40%	37%
Familiar with shopping here/habit	36%	25%
Convenient place to buy this type of product	35%	27%
Can one-stop shop for many categories	26%	23%
High-quality products	26%	33%
Can get my shopping done quickly	22%	31%
Better sales/promotions	21%	25%
Good customer service	21%	23%
Pleasant shopping experience	20%	21%
Good assortment of organic/natural products	16%	21%
Specific items/brands I like available only at this retailer	14%	14%
Good private label products	14%	21%
Frequent shopper/rewards program	13%	17%
Only retailer where I live that sells this type of product	6%	8%

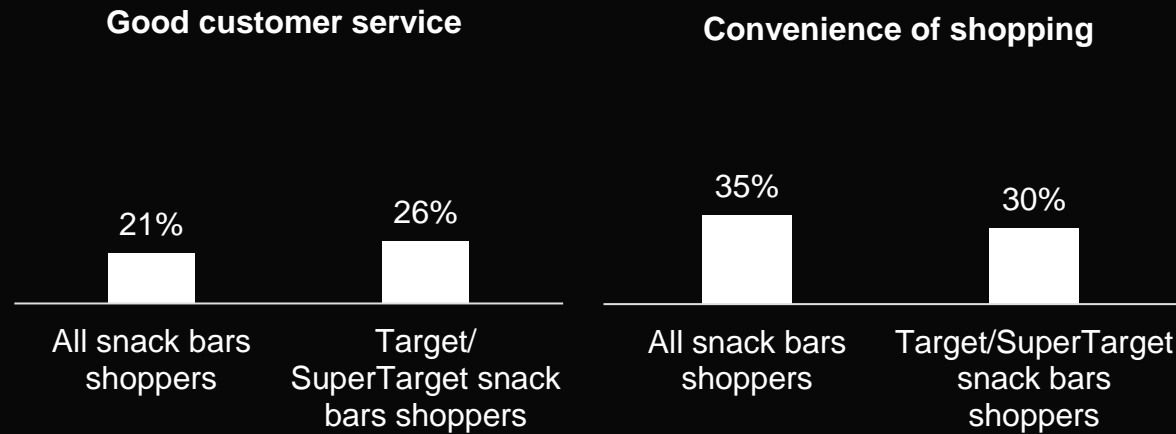
Reasons to shop snack bars at Target/ SuperTarget

Good customer service

Snack bars shoppers see Target/ SuperTarget as a retailer with good customer service.

Opportunity to improve convenience

Target/ SuperTarget has an opportunity to improve the perceived convenience of shopping the category.



Why snack bars shoppers choose to spend the most at Target/ SuperTarget (among shoppers who purchased snack bars in past four weeks)

	All retailers	Target/ SuperTarget
No statistical significance found		
Lower everyday prices	40%	38%
Familiar with shopping here/habit	36%	30%
Convenient place to buy this type of product	35%	30%
Can one-stop shop for many categories	26%	23%
High-quality products	26%	32%
Can get my shopping done quickly	22%	23%
Better sales/promotions	21%	17%
Good customer service	21%	26%
Pleasant shopping experience	20%	20%
Good assortment of organic/natural products	16%	20%
Specific items/brands I like available only at this retailer	14%	15%
Good private label products	14%	15%
Frequent shopper/rewards program	13%	20%
Only retailer where I live that sells this type of product	6%	6%

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