

On-the-go Convenience Takes a Hit as Customers Stay at Home

A brief analysis of the Nutritional Bars market, powered by Yogi

The Yogi Platform helps companies centralize, organize, and analyze consumer feedback data spread across reviews, surveys, emails, and more

YOGI WORKS IN THREE PHASES

Centralize

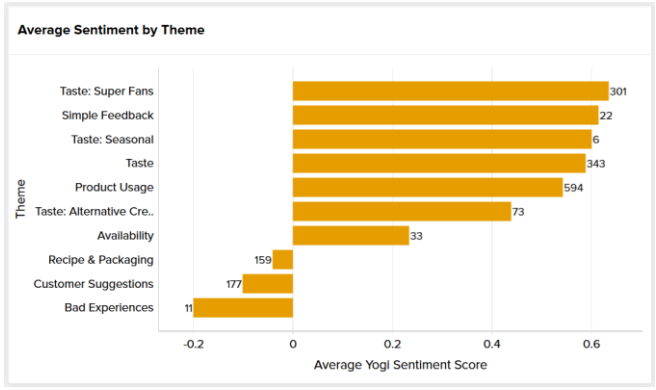
qualtrics, zendesk, SurveyMonkey, salesforce, Walmart.com, INTERCOM, bazaarvoice, influenster, CSV

Yogi pulls from ***both*** public and private sources to build a centralized feedback repository that can be searched and filtered.

Organize

Yogi uses advanced AI and Natural Language Processing technology to read through and organize the data based on sentiment, keywords, topics and more.

Analyze



Yogi's intuitive interface makes it easy for users to sift through data and reach granular insights that lead to tangible business improvements.

Yogi follows the strictest security standards including encryption, 3rd party audits, and SOC-II compliance.

Yogi analyzed 13,204 product reviews for 17 popular nutritional bars brands from 11 parent companies

Products Analyzed



Research Questions

ECOMMERCE

What can we learn about the eCommerce market for nutritional bars? Which brands are doing better than others and why?

BRANDS

How are some brands performing compared to others? What are their competitive advantages and disadvantages? How are they differentiating?

CORONAVIRUS

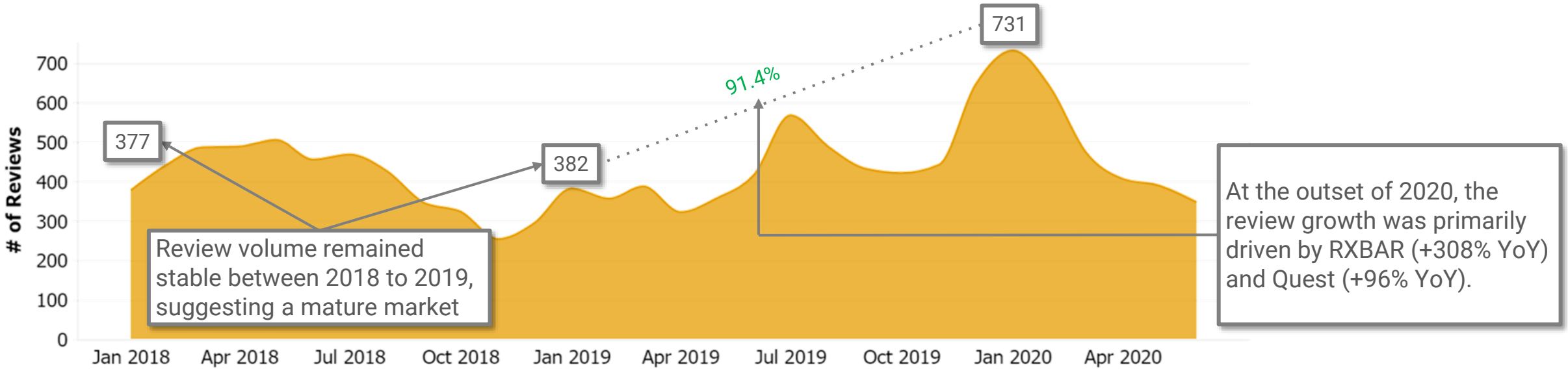
What changes has Covid-19 caused in the nutritional bar market? How has it impacted consumer preferences and shopping habits?

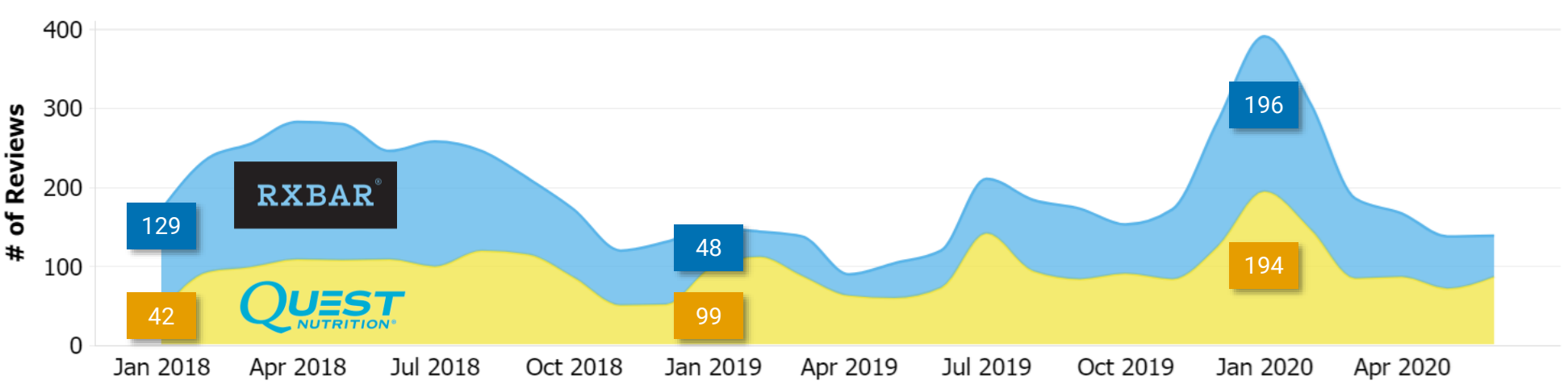
Yogi's use cases range from broad market research to more targeted competitive analysis. Below are summary findings from the nutritional bars market



- The U.S. nutritional bars market is a saturated and mature one, where numerous brands compete with different formats and flavors of products
- We found that most brands **perform well on average** with ratings **over 4 stars** and **positive sentiment**. **KIND leads the pack** with great consistency in customer experience, while **SlimFast lags behind**
    - Combining "Keto" and "Protein Cookie" concept, Quest Protein Cookie not only met customers' need for a low carb diet, but also satisfies their sweet tooth
- Overall review volume for nutritional bars remained stable from Q1 2018 to Q4 2019. Volume fluctuated up from April to July, as people hit the gym and start dieting to be in shape for the summer. The **4-month pandemic period to date** of Mar – Jun 2020 **negatively impacted** the nutritional bars market - **YoY growth rates become negative in June**
    - Both Quest and RXBAR's reviews grew in the first half of 2020. In contrast, their average sentiment is lower than most of the competition. They could improve ***Taste & Flavor*** and ***Shipping & Packaging***
- Compared with other themes, ***Shipping & Packaging*** and ***Texture*** had **lower sentiment scores**, driven by issues such as melted product, puffed up packages, and either rock-hard or overly sticky texture

Looking at review count over time, only RXBAR and Quest demonstrate strong growth, while most brands remained stable over the past two years





Yogi Callout

Fluctuations in review volume are often correlated with sales fluctuations.

Using its advanced Natural Language Processing algorithms, Yogi automatically detected 9 unique themes within these reviews



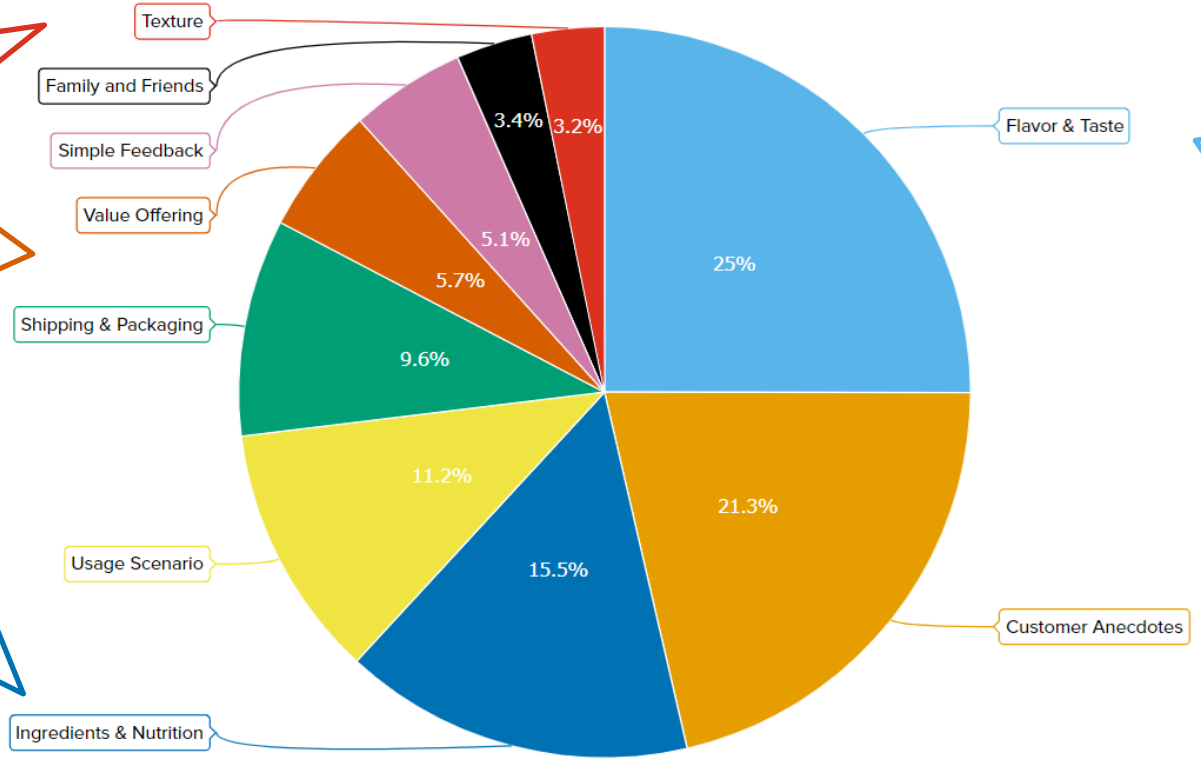
*"They are decent, **not super soft or chewy, gives your jaw a work out**..."*
- Mark



*"**I love the price on these. Cheaper to buy them here than my grocery store** and they are delivered to the door."*
- Kaitlan



*"It's **mostly dates**, with enough added things to make it taste interesting ...**chocolate**, **peanuts**. I like the **egg protein** because soy and dairy both give me mild allergy symptoms (skin irritation mostly)..."*
- William B.



*"Delicious! I loved the **peanut butter**, but wanted to try other flavors. **Chocolate deluxe** has become my fave! Thank you"*
- Catherine

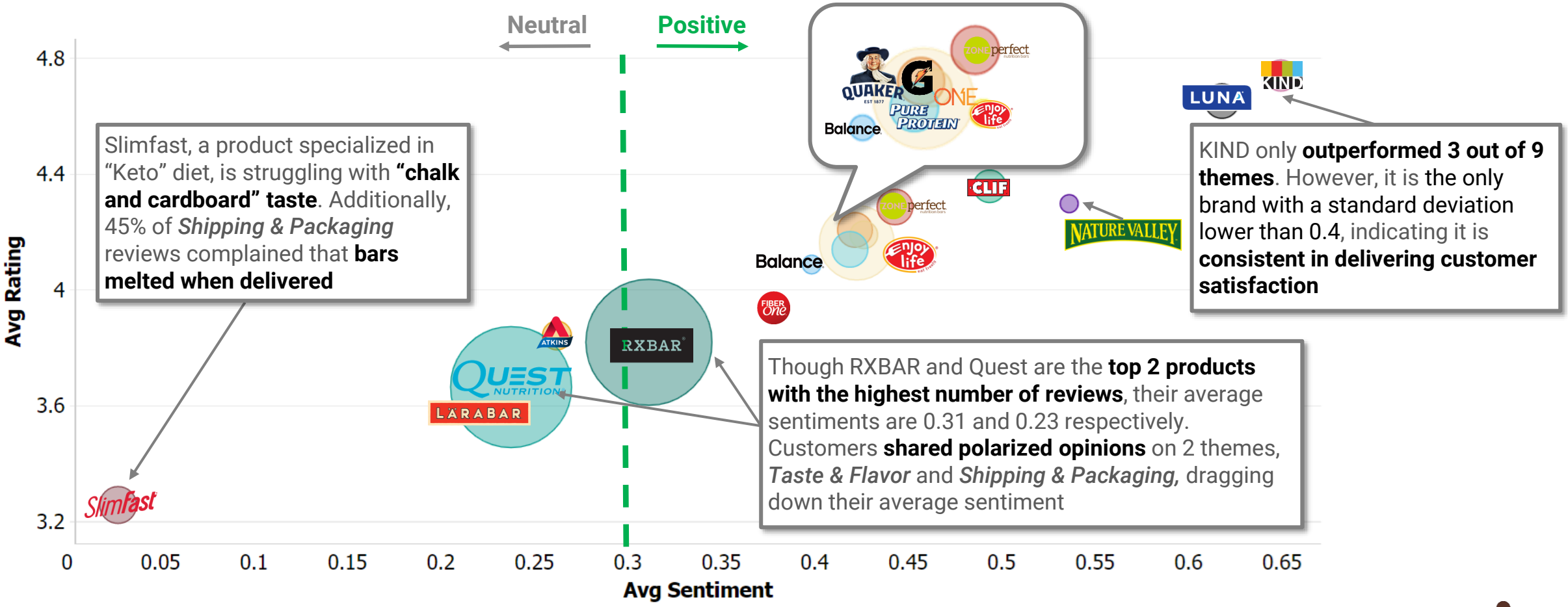


*"**These are definitely great tasting protein bars**- I have tried so many different ones and these are up at the top of my list for taste- especially with low carbs. The only downside is cost- even buying in bulk like this they are still expensive"*
- Bethany



When looking at rating and sentiment*, we see that KIND is clearly ahead of the pack, while SlimFast is lagging within the nutritional bars space

Average Rating and Sentiment Performance by Brand (Bubble Size Represents # of Reviews)



*Yogi's proprietary sentiment analysis algorithms scores overall tone of each review from a range of -1.0 to 1.0 (≥0.3 = positive, 0 = neutral, ≤-0.3 = negative)

Yogi

Shipping & Packaging is a common problem that troubles all brands, as is tough or inedible ***Texture***

Texture

None of the brands scored a positive sentiment in ***Texture***. It's hard to achieve a balance between "rock-hard", and "too chewy"

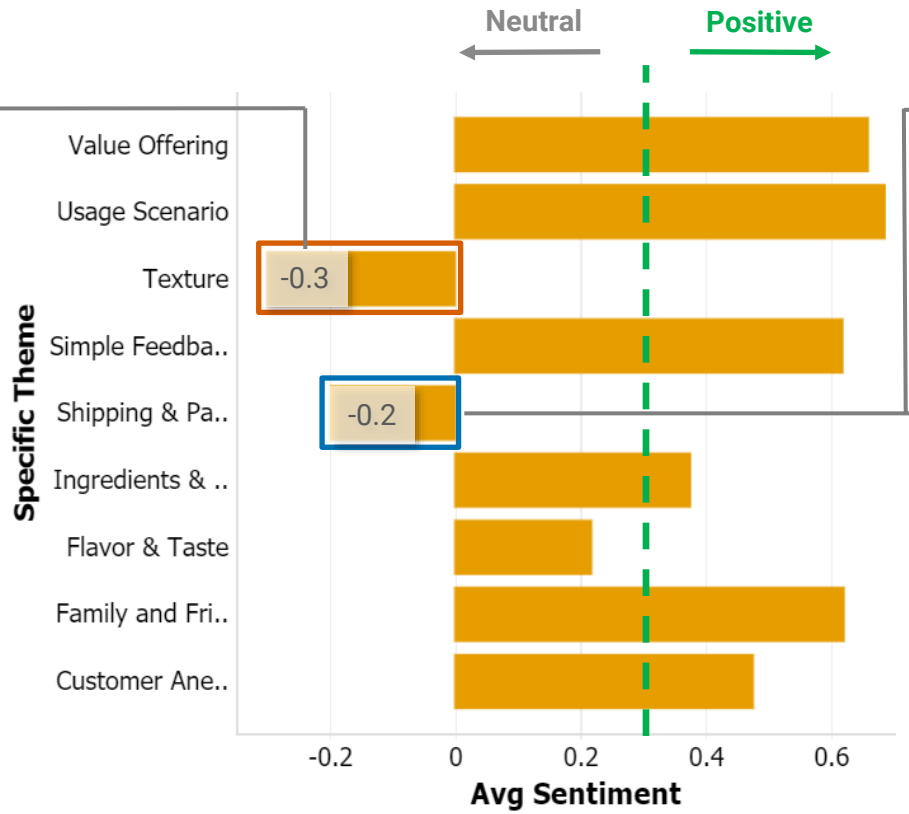
*"Do not eat this if you have braces. You will never get this out of your braces, **it is so sticky it clogs up your teeth**. The flavor of the dates overwhelmed everything else."*

- Marleigh H

*"I'll eat pretty much anything, but **man these things are hard to chew** (like the old school power bars that felt like you were eating rubber). The flavor was good, **but I had to return them due to the texture**."*

- zombiemuppet

Average Sentiment by Theme



Shipping & Packaging

Ground shipping may not be friendly to heat-sensitive products. Consumers might receive puffed up packages or a melted product

*"These are delivered to your door and if the sun hits them they grow bacteria and the **packages get puffy with air** so do not eat them! Told Amazon about this health hazard."*

- Miss B

"Product is great! Shipping to a hot climate will result in melted product... last three times they were melted and the ice pack included to prevent this was the hottest thing in the box ????"

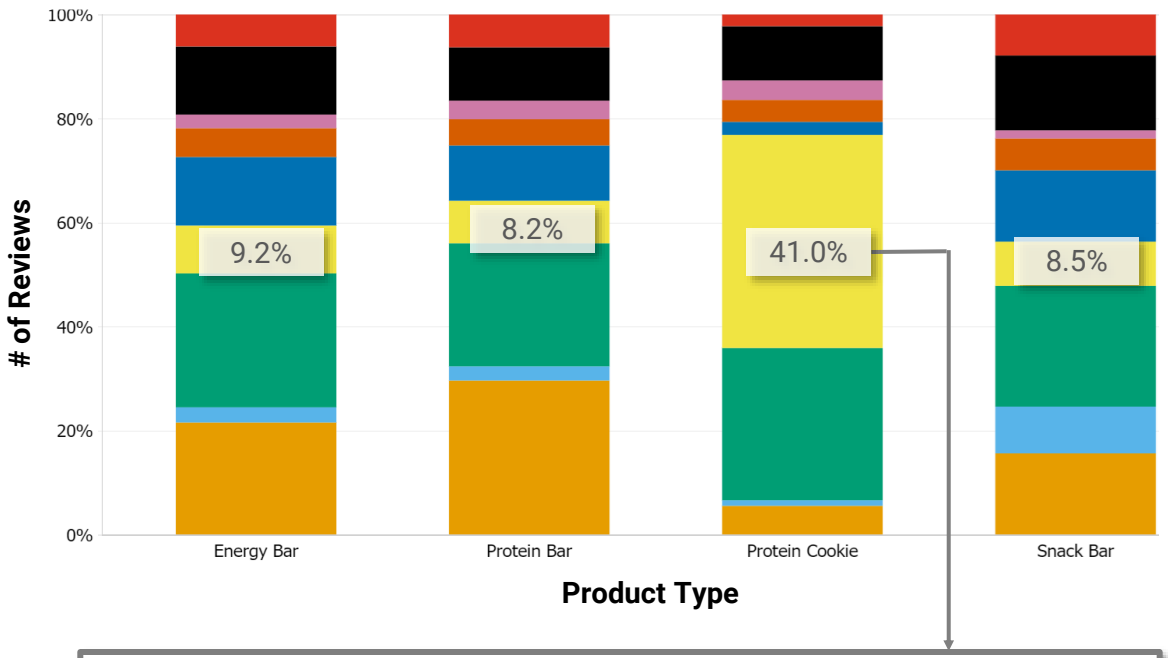
- Lucius S.

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Yogi

By introducing a keto-friendly cookie, Quest's Protein Cookie satisfied the needs of both cookie lovers and Ketoers while differentiating itself from competitors…

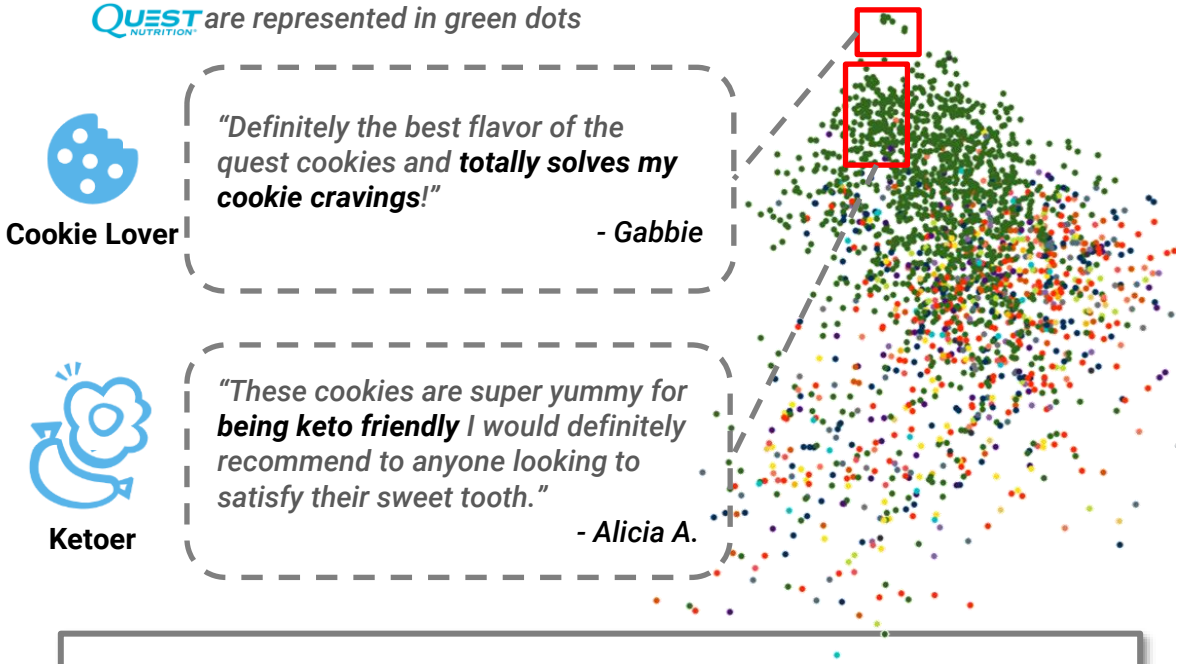
Theme Distribution by Product Type



Quest Protein Cookie shoppers care more about ***Ingredients & Nutrition***, which made up 41% of all reviews vs. 8~9% for other product shoppers

Network Graph – *Ingredients & Nutrition* Theme

Yogi Network Graph filtered to display only Ingredients & Nutrition reviews.
QUEST are represented in green dots

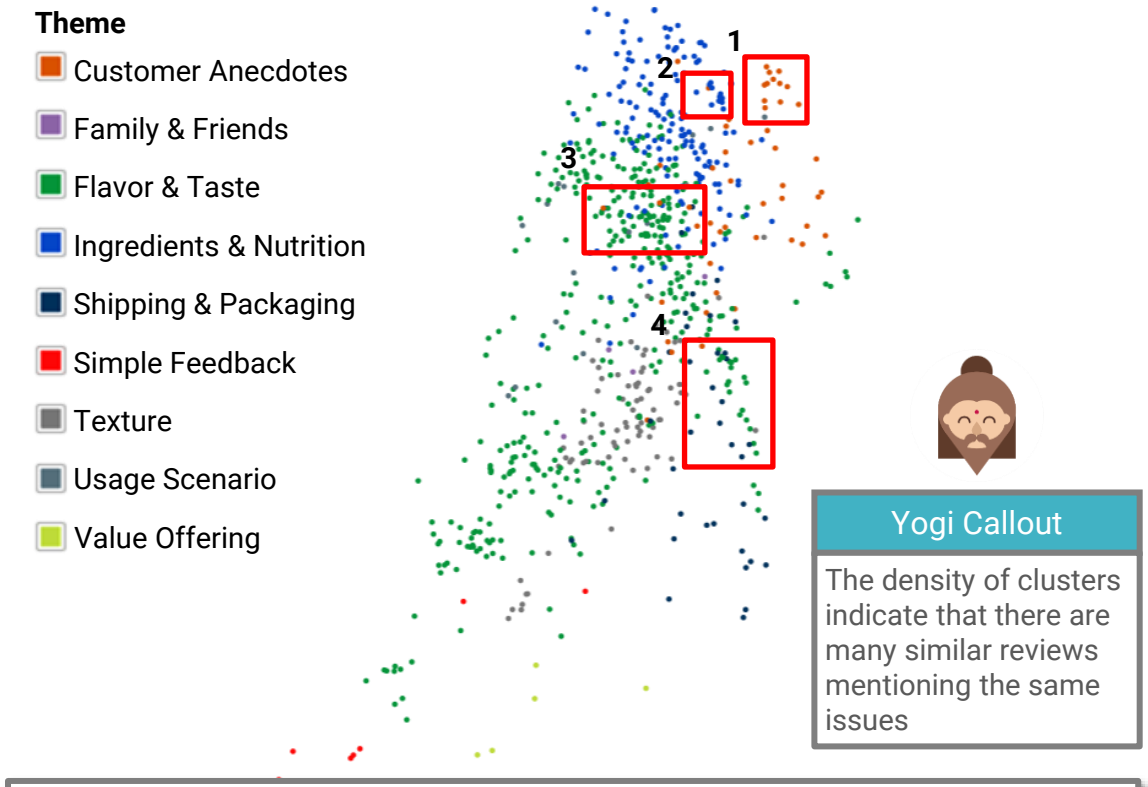


19.5% of Quest's ***Ingredients & Nutrition*** reviews mention "Keto", compared with only 2.2% for other brands

Specific Theme
Customer Anecdotes | Family and Friends | Flavor & Taste | Ingredients & Nutrition | Shipping & Packaging | Simple Feedback | Texture | Usage Scenario | Value Offering

…However, Quest could improve its customer experience with clearer nutritional and allergen labeling, sturdier packaging and a Peanut Butter flavor recipe reformulation

Network Graph – Negative Sentiment



Yogi Callout

The density of clusters indicate that there are many similar reviews mentioning the same issues

51.4% of consumers gave negative feedback on ***Shipping and Packaging***.
47.0% of consumers held negative sentiment on ***Flavor & Taste***.

Competitive Weakness

1. Misleading Labels

*"**Counts NET Carbs vs ACTUAL Carbs…which is 4g vs 19g…**huge difference! **That's plain not right**…"*

- Sheriann

2. Potential Allergic Reactions

*"NOT GLUTEN FREE. **Celiacs beware!!** …The manufacturer had to change the packaging to remove the lie about gluten… **Made me sick and manufacturer admitted it**. DO NOT BUY. me on you!!!! "*

- A. F.

3. Controversial Peanut Butter Flavor

*"The peanut butter cookie is very stiff. **It doesn't taste like peanut butter at all** and it leaves your mouth feeling very dry. You'll need a glass of water nearby! I love PB cookies so I had high hopes."*

- Amazon Customer

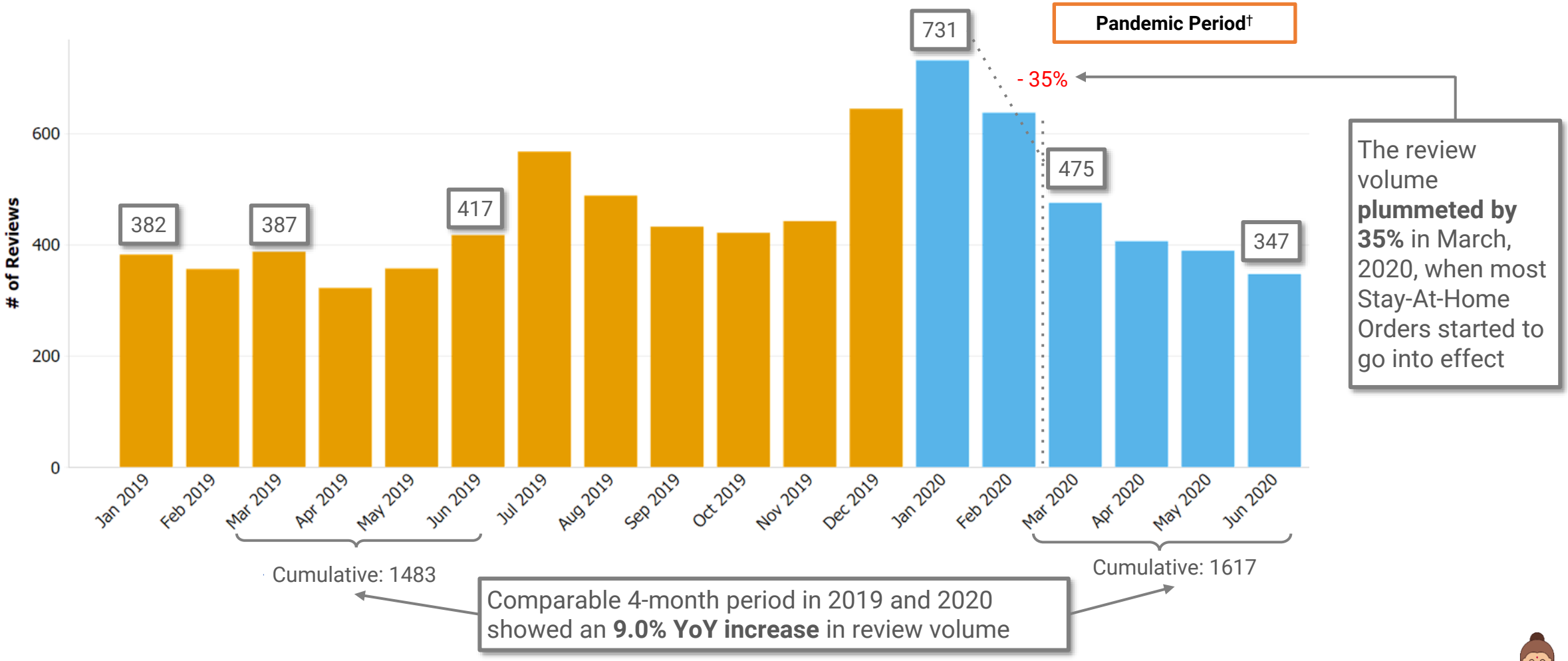
4. Broken Package

*"**Twice now this product has arrived with the product seal broken**…Throwing them in the garbage to be safe…"*

- Amazon Customer

The pandemic reversed the growth trajectory of nutritional bars, reducing the YoY growth rate from +91.4% in Jan 2020 to -16.8%

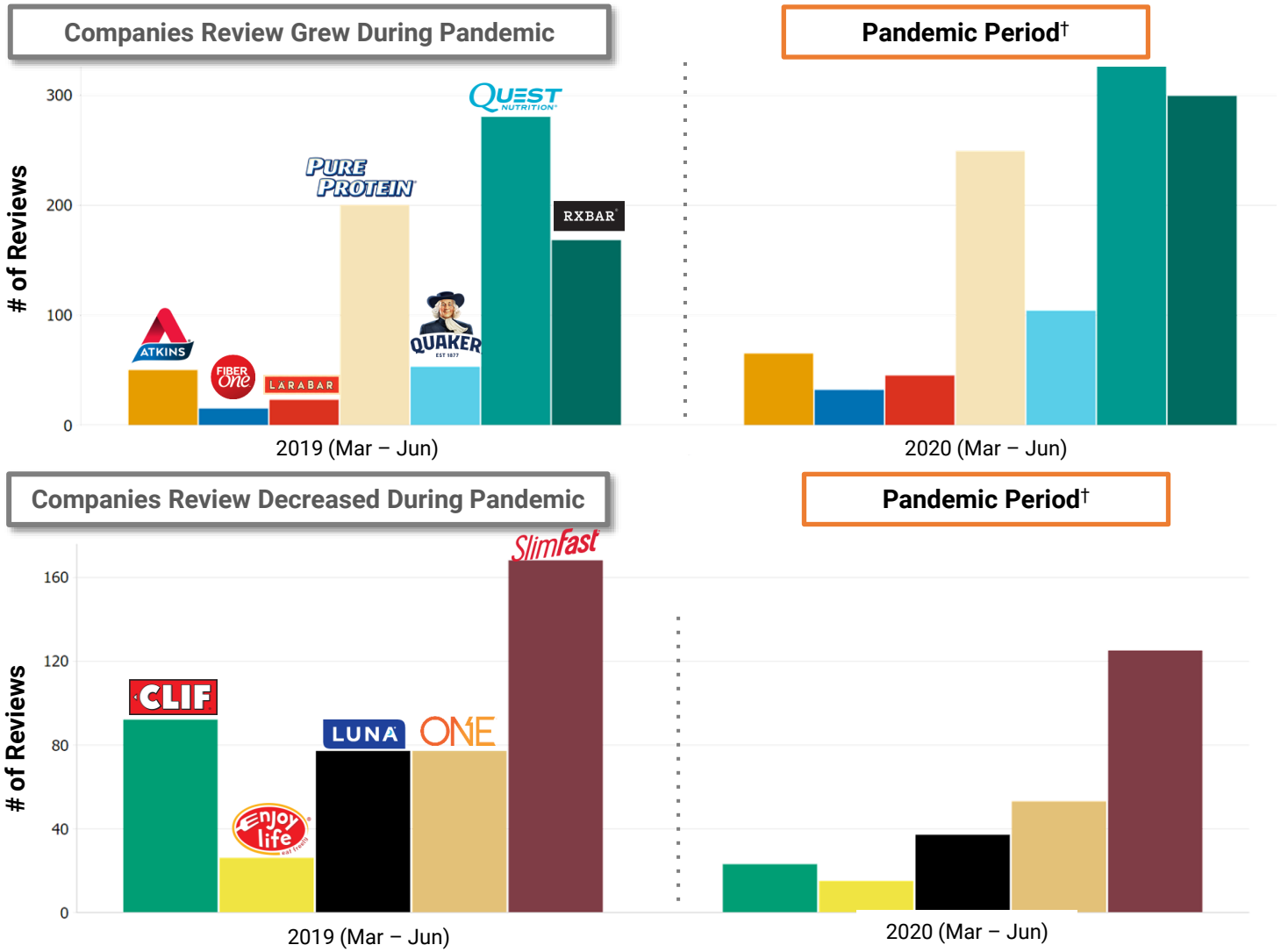
All Brands Review Volume Comparative Period Analysis – 2019-2020



† On Feb 29th, the first reported coronavirus death was reported in the US. By March 26th, the US led the world in confirmed cases.

Yogi

Though the demand of “on-the-go convenience” was depressed when people making food at home, some companies were still growing at the cost of other companies

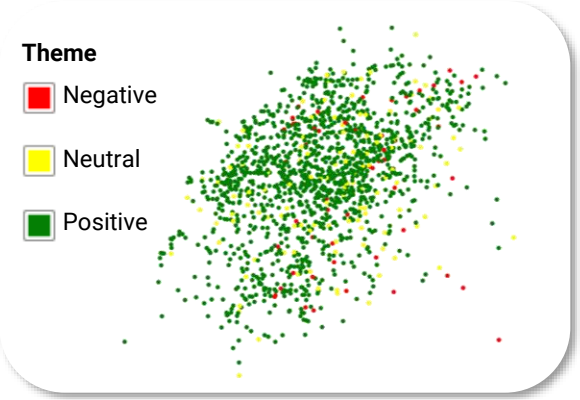
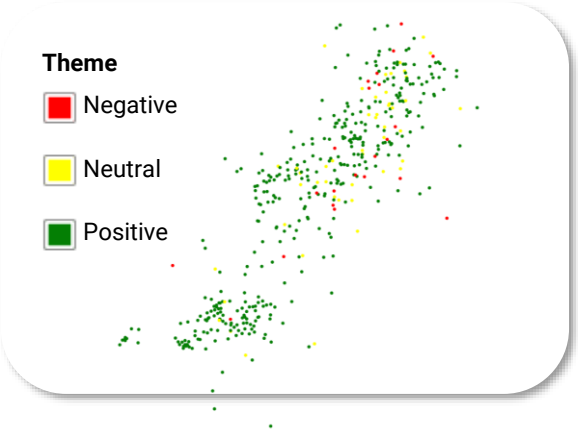


Pre and During Covid-19 Relative Periods

Brand	Mar – Jun 2019	Mar – Jun 2020	Δ
FIBER One	15	32	*113%*
RXBAR	168	299	*78%*
QUAKER	53	104	*96%*
CLIF	92	23	*- 75%*
LUNA	77	37	*- 52%*
enjoy life	26	15	*- 42%*

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With highly positive average sentiment, self-care and sharing with family & friends could be next growth drivers when life returns to normal

	Network Graph	Customer Persona	Selected Quote
Usage Scenario **Theme**		**Crossfitter** *Protein supplement* **Outdoor Lover** *On the Go Meal Replacement* **Busy Worker** *Snacks for the Sweet Teeth*	*"I like this product because I do a lot of hiking.* ***They're very easy to carry don't take up a lot of room in my backpack*** *and they pack a lot of energy. I would recommend them for all hikers"* ***- Rich***
Family and Friends **Theme**		**Elder** *Treats for grandkids* **Teenage** *Snacks prepared by parents* **Husband** *Snacks purchased by wife*	*"****Bought these for my grandson****, can't eat dairy products. He says the flavor is rich and excellent. The size of the bars are quite smaller than anticipated, packaging was appropriate. All in all, these are good for somebody that can't have diary products. I would buy them again..."* ***- Steve***



Want to see the full analysis?

Reach out for a demo today.



Yogi

Understand your customers, **like never before**

Yogi is a cloud-based software company headquartered in New York. It provides feedback analytics solutions and business intelligence dashboards to customer-focused businesses.

Our Mission

Yogi aims to usher in a new age of excellent customer experience by better integrating the downstream stakeholders of products to the upstream developers, marketers and executives through AI-assisted data-driven decision making.