



THE HIDDEN CONNECTIONS THAT WIN CONSUMERS IN A DIVIDED WORLD



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WHAT TO EXPECT

- 01 | Balancing broad appeal with local nuance fails with a one-size-fits-all approach.
- 02 | Local belief-based segmentation identifies opportunities in competitive markets.
- 03 | Belief-based insights align innovation to stories that resonate, scale, and endure.

THE GLOBAL INNOVATION TRAP

“A one-size-fits-all strategy doesn’t fit anyone anymore.”

Global reach ≠ universal taste

What works in one market can misfire in another.

Demographics ≠ beliefs

Age, income, or gender tell you who — not *why*.

Surface-level insights = superficial impact

Without emotional or cultural depth, innovation struggles to stick.



Source: <https://partnersinexcellenceblog.com/one-size-doesnt-fit-all/>

A TALE OF CULTURAL HITS AND MISSES

Hershey in China:

Assumed American taste was universal

Result: Cool reception, limited emotional relevance



Image source: <https://www.chinadaily.com.cn/a/202202/16/WS620cd63ea310cdd39bc87036.html>

Ferrero Rocher in China:

Tapped into gifting culture and premiumization codes

Result: Widespread popularity, strong emotional and cultural resonance



Image Source: <https://usa.chinadaily.com.cn/a/201812/12/WS5c10633ba310eff303290794.html>

CONFECTION OPPORTUNITIES FOR A DIVIDED WORLD

LOCAL SEGMENTATION METHODOLOGY

1. **Segment:** Gen Z and Boomers by country
2. **Decode:** Meaning of chocolate per group.
3. **Identify:** Key belief-based drivers.
4. **Measure:** Top drivers by segment.
5. **Align:** Shared beliefs and triggers.

GOAL: Discover what unites seemingly opposite segments — and power innovation that resonates.



BELIEF-BASED DRIVERS

- ❖ Indulgence
- ❖ Sustainability
- ❖ Artisanal
- ❖ Adventure
- ❖ Social Connection



Source: <https://toakchocolate.com/blogs/news/can-chocolate-make-you-happy>

U.S.: CHOCOLATE AS A MOOD BOARD

Current & Future State: **Where consumer conversations are heading**

How to Interpret: ?

Taylor
22,
Portland



“ ”

Chocolate should reflect how I feel — bold, vibrant, and a little unexpected. It better match my vibe and taste amazing.



Michael
64,
Minneapolis



“ ”

Chocolate should make me smile — rich, smooth, and a little surprising. A dark bar with a hint of sea salt or orange is perfect: familiar, with just enough of a twist.

LUX TAKE

Indulgence + Adventure ➡ **Mood alignment**

Chocolate is my edible mood board. A multisensorial reward that feels exactly how I feel.

FROM BELIEFS TO BREAKTHROUGHS

U.S.

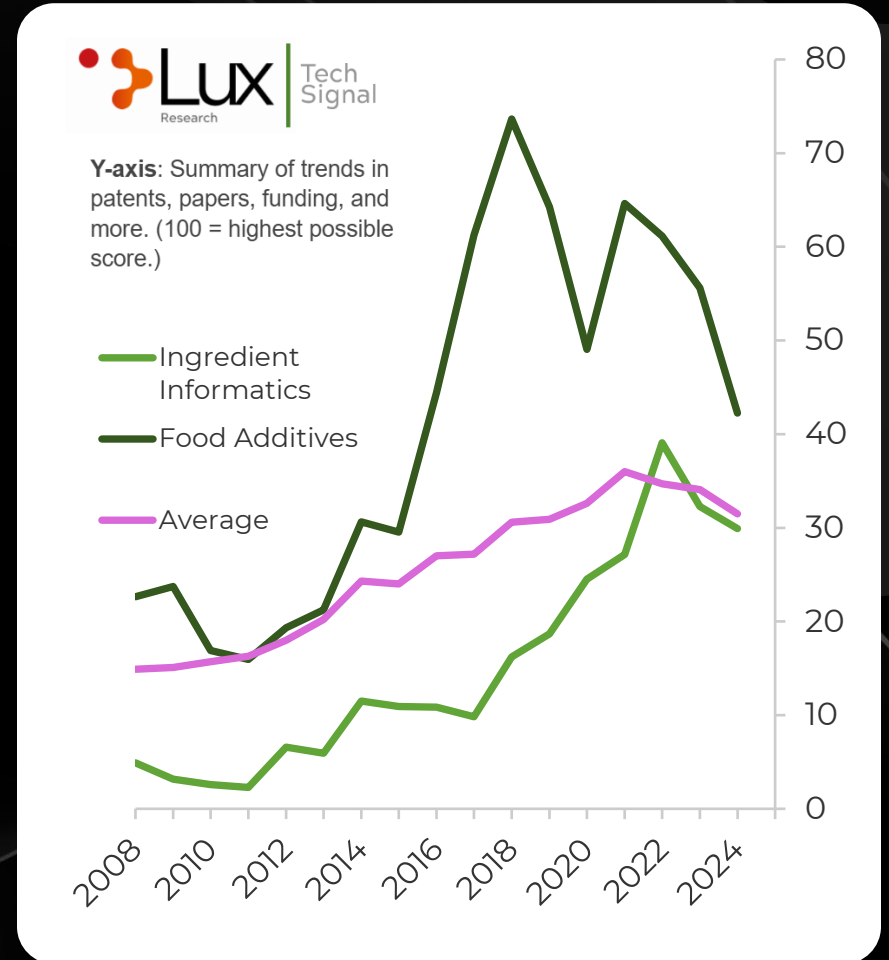
Indulgence + Adventure = Mood alignment

Emerging technologies open the door for agile creation of consumer experiences:

Functional ingredients

Ingredient informatics

LUX TAKE



FROM BELIEFS TO BREAKTHROUGHS

U.S.

Indulgence + Adventure = Mood alignment

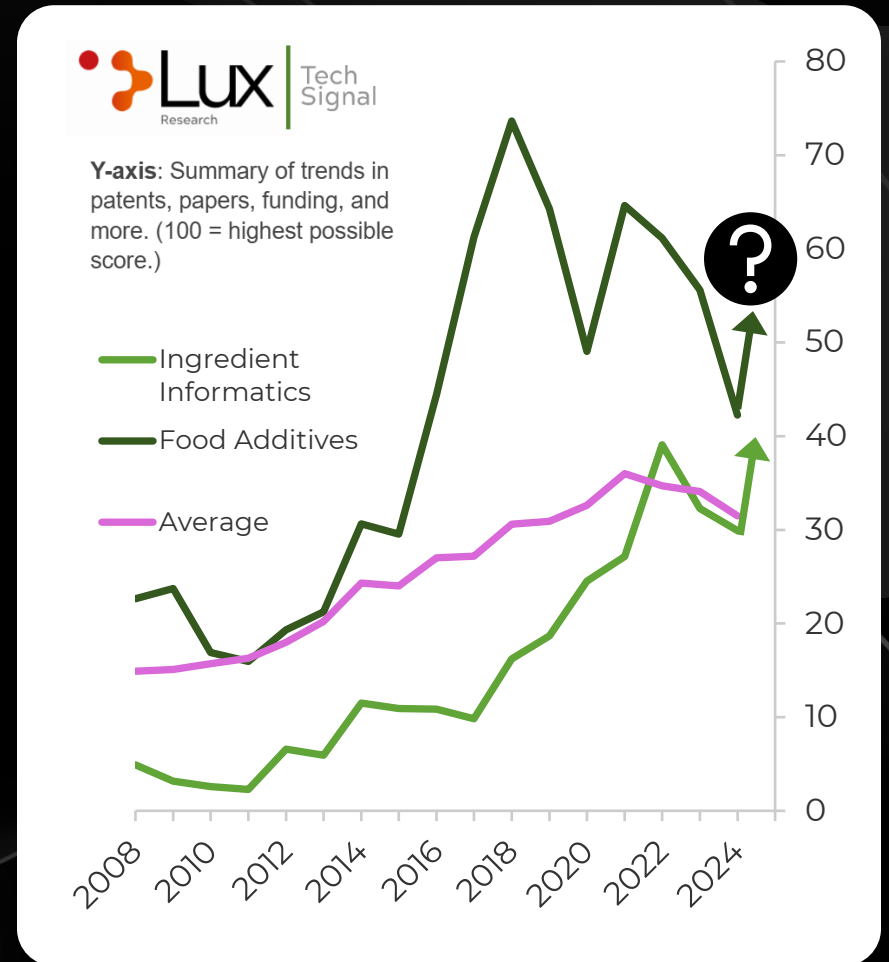
Emerging technologies open the door for agile creation of consumer experiences:

Functional ingredients — flavor, texture, form

Ingredient informatics — smart formulation

LUX TAKE

U.S. policy will target wellness, synthetic flavors, and functional ingredients. As these ingredients come under scrutiny, there is a well-timed opportunity to align with adventure-seeking consumers, but most innovators target chocolate alternatives.



FROM BELIEFS TO BREAKTHROUGHS

U.S.

Indulgence + Adventure = Mood alignment

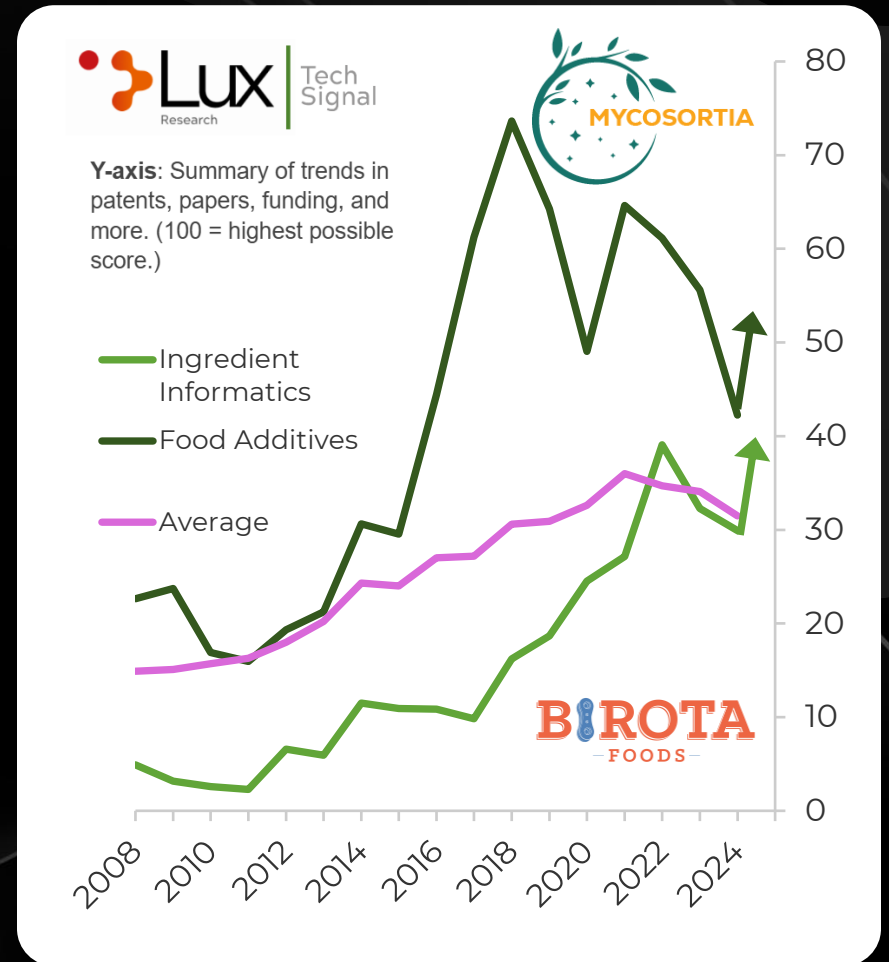
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GERMANY: CHOCOLATE WITH PRINCIPLES

Lina
23,
Berlin

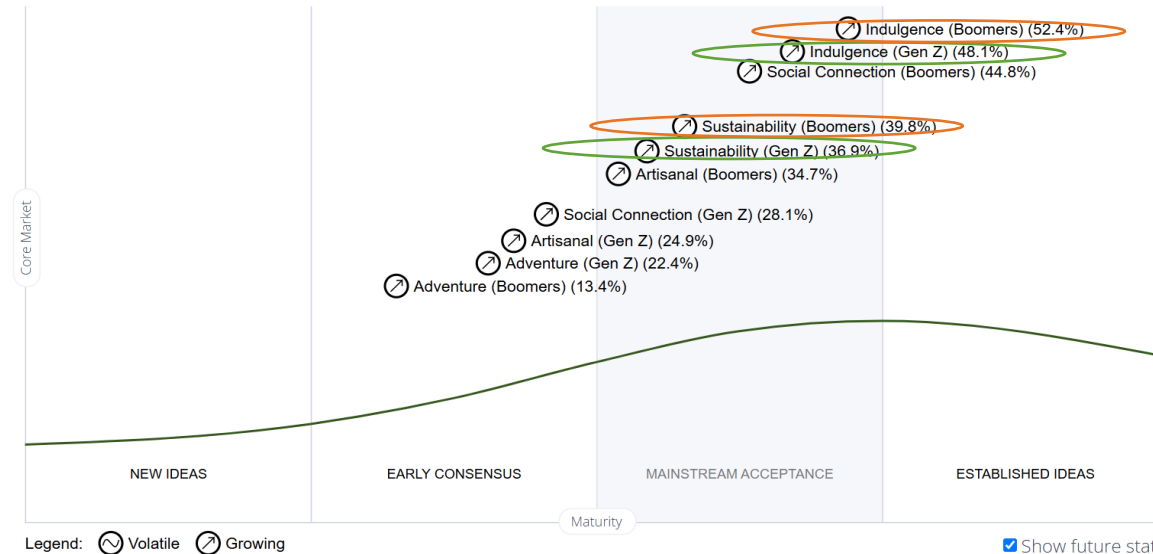


“ ”

If it's not sustainable, it's not me. Chocolate should do good, look good, and say something real.

Current & Future State: **Where consumer conversations are heading**

How to Interpret ?



Heinz
66,
Munich



“ ”

Chocolate should be grounded, trustworthy, and proudly made — not trendy, just timeless.

LUX TAKE

Indulgence + Sustainability ➡ **Trust**

Chocolate is about values, character, and principled pleasure: something to feel good about.

FROM BELIEFS TO BREAKTHROUGHS

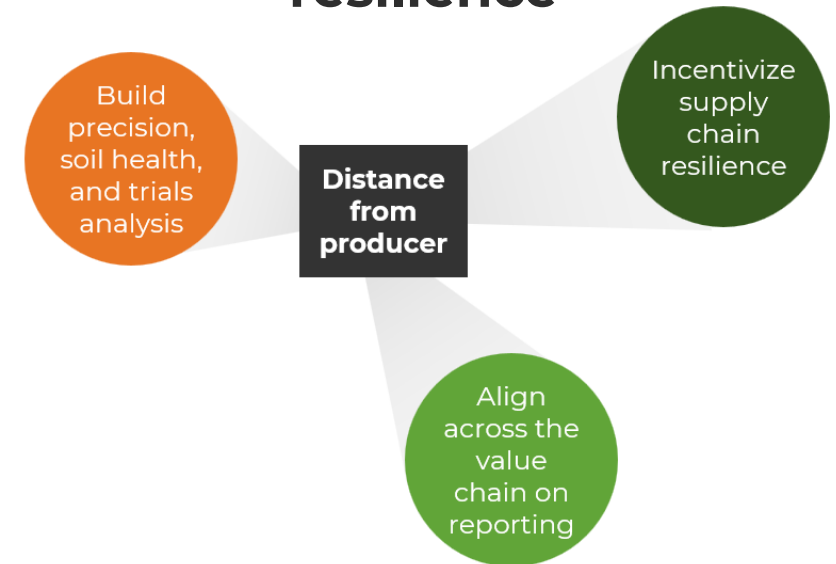
Germany

Indulgence + Sustainability = Trust

Maintaining quality and sustainable origins requires the application of technologies that support agriculture practices, monitor quality, and provide reporting transparency to connect to consumers.

LUX TAKE

**Digital options emerge,
and all connect to
resilience**



FROM BELIEFS TO BREAKTHROUGHS

Germany

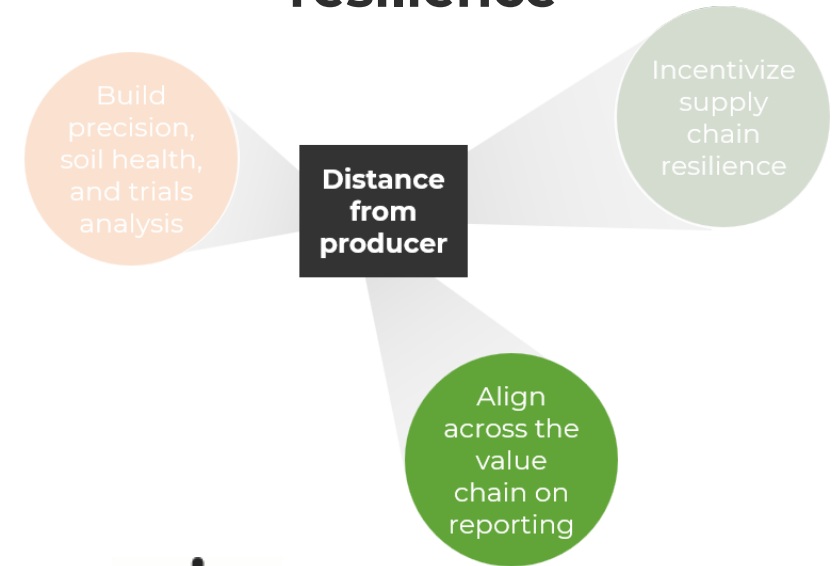
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LUX TAKE

Monitoring and delivering on trust and quality are difficult given complex relationships among stakeholders and distances along the supply chain, but regional policies are driving pilots in countries like Ghana.

**Digital options emerge,
and all connect to
resilience**



Helios

FROM BELIEFS TO BREAKTHROUGHS

Germany

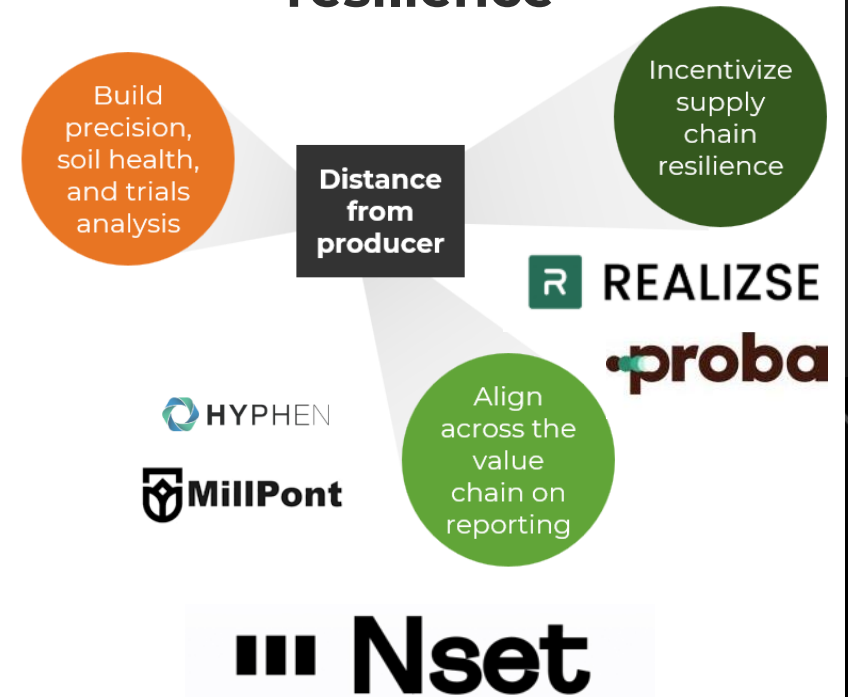
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**Digital options emerge,
and all connect to
resilience**



CHINA: CHOCOLATE AS A GESTURE

Yuqi
21,
Chengdu



“ ”

Chocolate should surprise me like a warm hug and a little love letter — all in just one bite.

Current & Future State: **Where consumer conversations are heading**

How to Interpret ?



Jinhao
64,
Hangzhou



“ ”

Chocolate should be honest, dependable, and comforting — a quiet way to say “I’m here.”

LUX TAKE

Indulgence + Social Connection ➡ **Relationship Forward**

Chocolate is a gesture, a connecting ritual, a sweet way to say “I love you” — to others or just to myself.

FROM BELIEFS TO BREAKTHROUGHS

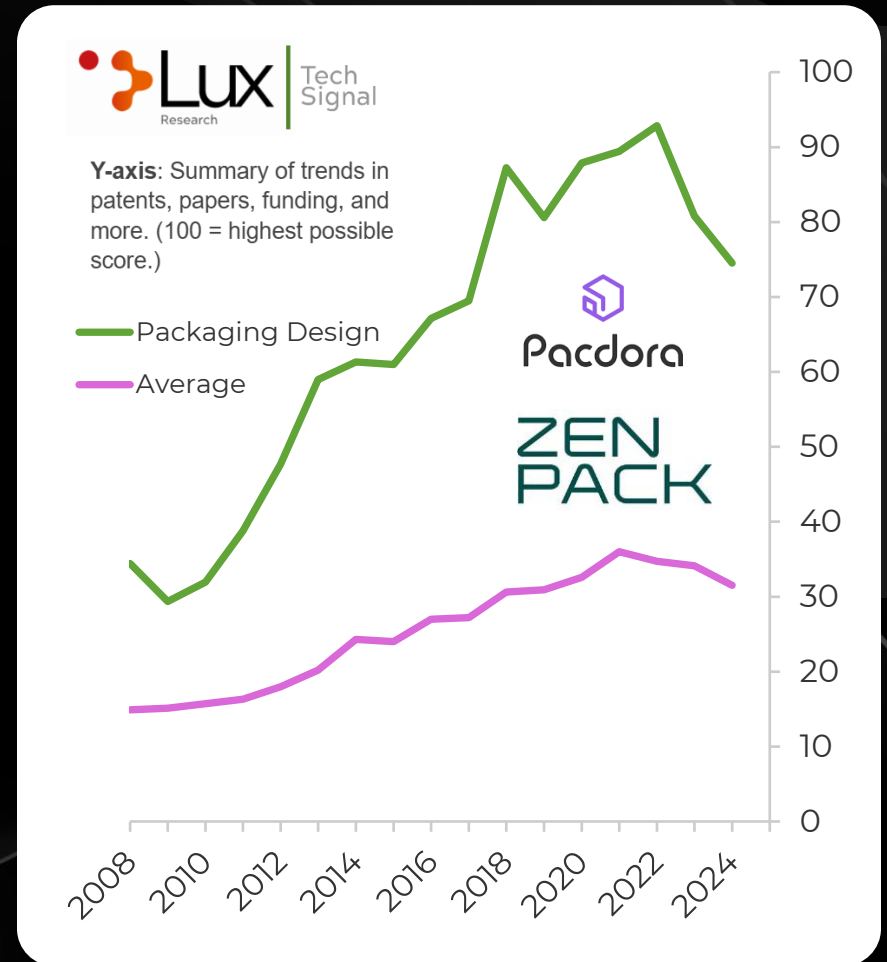
China

Indulgence + Connection = Relationship Forward

Creating connection may begin with balanced flavors and textures, but packaging design innovation can help create connection.

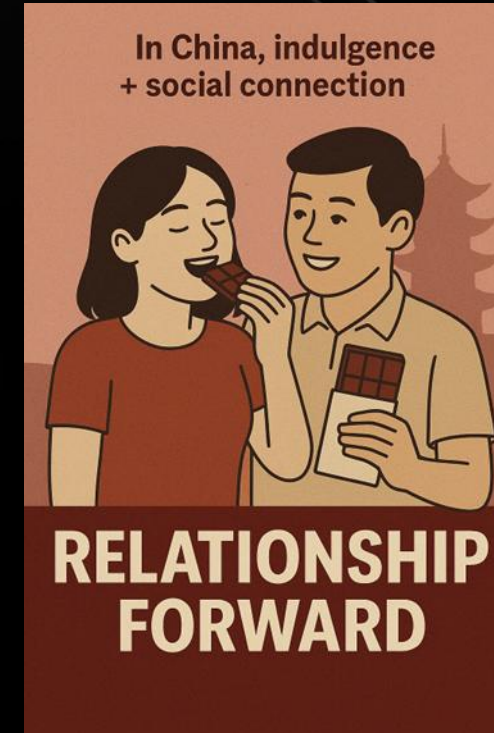
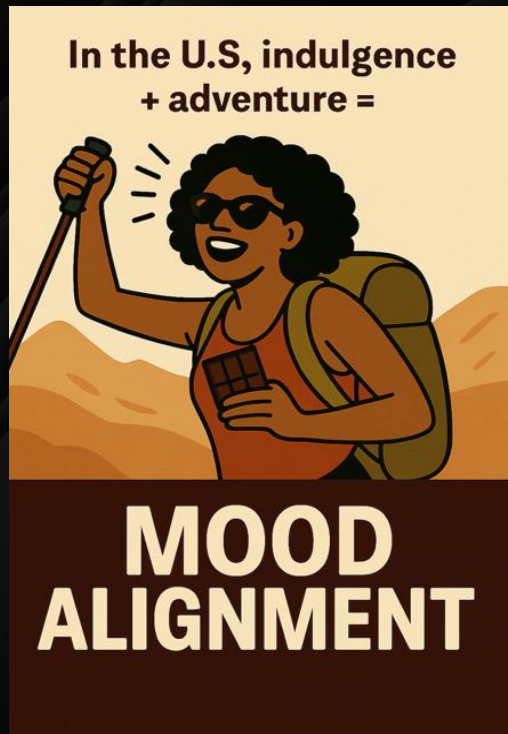
LUX TAKE

Smart packaging must offer strong benefits, not just novelty. Instead of smart packaging, focus on innovating agile packaging design that aligns to consumer beliefs.



SAME DRIVER, DIFFERENT MEANINGS

"A one-size-fits-all indulgence surely doesn't fit anyone anymore."



**Indulgence matters, but the meaning of indulgence is shaped by
*what else matters too: adventure, trust, and connection.***

KEY TAKEAWAYS

1

Blend global strategy with local meaning.

A global message is only powerful when it feels personal. Aligning with shared emotional drivers is key — but real traction happens when brands translate those drivers through local culture, rituals, and expectations.

2

Beliefs unlock shared value across generations.

Gen Z and Boomers might live differently, but they often want the same things — joy, comfort, connection, and trust. Belief-based segmentation reveals the emotional overlap that demographics alone can't see.

3

Tech makes beliefs actionable at scale.

With the right tools — from precision sourcing to ingredient innovation to smart packaging — you can turn cultural insight into products and experiences that are meaningful, trustworthy, and ready to scale.

LUX CLIENT ACTION ITEMS

1

Don't settle for demographics alone.

While demographics help build a market profile, it is the beliefs of consumers that impact behaviors. Leave beliefs out at your peril.

2

Apply beliefs-based segmentation to find opportunities as nationalism takes hold.

Nationalistic agendas that drive market changes require beliefs-based segmentation to make the most out of existing product positioning and innovation targets.

3

Don't stop at segmentation; align it to solution availability and readiness.

Market dynamics constrain resources. Building a consumer and technology readiness-based innovation ecosystem creates efficient links and enables agile and lean innovation.



THANK YOU



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