Background to report

What?
- There have been significant changes in the snacking market in recent years with particular changes noted in health. This study was designed therefore to explore our relationship with snacking today with a particular look at the role of healthy snacking in consumers lives today. Specific sectors explored included crisps, chocolate, popcorn, nuts, air popped snacks, seeds, protein balls and bites and bars, kale snacks, meat snacks and dried fruit.

Why?
- Key to the study was to understand motivations and behaviours in the snacking market with the aim of unlocking potential opportunities for new products and brands in the category.

Take-out
- The study highlights the debit credit approach people take to food and how this influences behaviour throughout the day and through the week. Brands can tap into different motivations across these times that highlight opportunities both in terms of health and permissible indulgence and indeed super indulgence. People still identify strongly with the traditional snacks of crisps biscuits and chocolate. Overall the study highlights a gap for a range of new healthier options not just identified by product but also by price, format, size and the creation of a clear and transparent language within the category.
What the content of this report covers

1. The world of snacking today: context and headlines

2. Healthy snacking: key influencers

3. Snackers today, their repertoire, occasions and relationships with snacking

4. Purchasing habits and behaviours

5. Challenges and resolutions
Our research partners

The research was conducted between September and November 2017.

The study was undertaken in conjunction with Spark Market Research Agency.
The research involved a number of distinct elements

**Situational Analysis**
Using desk research analysing traditional & social media influences to examine the wider macro landscape relating to snacking

**Pre-Tasks**
Pre-tasks designed to delve into the day-to-day of our participants allowing us a ‘behind the scenes’ look using a ShadowCam and Collage tasks

**Workshops**
2 hour workshop style groups with 7-8 participants; covering current behaviours, brands & products purchased, definition of healthy and impact of packaging

**Quantitative Surveys**
3 elements of quantitative research needed to establish the state of play in both markets; A UK omnibus & Irish omnibus and UK survey on snacking occasions and attitudes
Sources and Channels for Situational Analysis

Published reports
Nielsen, Kantar, You.gov, Mintel, Euromonitor

Social Media
Pinterest, YouTube videos, Twitter, Instagram, Facebook, boards.ie, Bloggers, celebrities

Trend Channels
Google Trends, Trend Hunter, Newspaper and Trade Magazines

News
News and entertainment articles about Healthy Eating and Snacking initiatives and legislation

Internet Search
Keywords: Snacking, Healthy Snacking

The result is an overview of key trends both at a local and global level
There were three quantitative elements to the research – 2 omnibus studies and 1 ad-hoc study among snackers.

**UK omnibus & Irl omnibus**

Both nationally representative studies, flagged as follows:
- UK nat rep n=1,000
- Irl nat rep n=1,004

**UK snacking survey**

This study was focused on a specific group:
- 18-54 year olds who snack
- Some interest in eating healthily

In the UK, this represents about 57% of 18-54 year olds

Flagged as: UK snackers aged 18-54 n=1,000
1. The world of snacking today: context and headlines
A sizeable bite – the snacking category today

The All Ireland Snacking Category (Mintel, 2016)

If snacking were a Super Product Category - it would be the 2\textsuperscript{nd} largest in value ahead of both Alcohol and Tobacco and the 3\textsuperscript{rd} fastest growing
Over 70% of all consumers snack each day.

Weekday routine:
- **I eat at mealtimes only (e.g. 3 meals per day)**: 28%
- **I eat at mealtimes with one or two snacks in between**: 46%
- **I have meals but tend to graze throughout the day**: 14%
- **I don’t usually have specific meals and tend to graze/snack throughout the day**: 3%
- **Every day is different and I have no typical eating routine**: 9%
- **I eat at mealtimes only**: 8%

Base: UK Nat Rep n=1000, IRL Nat Rep n=1004
Number of eating occasions is rising

**Number of eating occasions**

<table>
<thead>
<tr>
<th>Occasions</th>
<th>Ireland</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-2</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>3</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>4</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>5</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>6+</td>
<td>14%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**Trend in eating occasions**

How has the number of occasions on which you eat in a typical day changed over the past couple of years?

- Has decreased a lot: 2% (Ireland), 3% (UK)
- Has decreased a little: 12% (Ireland), 13% (UK)
- Has stayed the same: 52% (Ireland), 43% (UK)
- Has increased a little: 26% (Ireland), 31% (UK)
- Has increased a lot: 8% (Ireland), 9% (UK)

*Base: UK Snackers Aged 18-54: n=1000, IRL Snackers Aged 18-54, n=564*
What is a snack?

Early references to what a snack is have not changed over time, but it’s our relationship with snacking that has evolved.

**snack**

v.
c.1300, "to bite or snap" (of a dog), probably from Middle Dutch or Flemish *snacken* "to snatch, snap; chatter," which Watkins traces to a hypothetical Germanic imitative root *snu-* forming words having to do with the nose (see *snout*). The meaning "have a mere bite or morsel, eat a light meal" is first attested 1807. Related: *Snacked* ; *snacking*. 
Battle of the oldest snack foods in the world is still raging on!

We have in fact been consuming some of the same snacks for centuries!
20 years ago the landscape for snacks was very colourful, noted for lots of ingredients and additives (Mintel, 1997)
The snacking landscape today is changing into one of purity, less ingredients and more pared back packaging (Mintel, 2017)
According to our study, 4 in 10 people in Ireland are snacking more often nowadays.
The study highlights that snacking is more common amongst a younger profile. 43% of over 65s eat at mealtimes vs 24% of U65s. Base: UK nat rep n=2,000; Irl nat rep n=1,004.
Just over 90% of Irish consumers worry about what they eat!
... and 3 in 4 are “Trying to be Good”

<table>
<thead>
<tr>
<th>Disciplined</th>
<th>Trying hard</th>
<th>Good intentions</th>
<th>Guilt-free</th>
</tr>
</thead>
<tbody>
<tr>
<td>I carefully manage my food and consider myself a very healthy eater</td>
<td>8%</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>I eat healthily most of the time but do sometimes slip and eat unhealthy food / snacks</td>
<td>10%</td>
<td>56%</td>
<td>26%</td>
</tr>
<tr>
<td>I have good intentions to eat healthily but am only successful some of the time</td>
<td>36%</td>
<td>34%</td>
<td>21%</td>
</tr>
<tr>
<td>I tend not to worry about which foods are healthy and just eat what I enjoy</td>
<td>8%</td>
<td>26%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: UK nat rep n=2,000; Irl nat rep n=1,004
And yet crisps, biscuits and chocolate are still our favourite snacks...

Base: UK nat rep n=1,000
Unhealthy snacks are much more popular than healthy snacks. When people were asked to think about the last time they had a snack, the predominant snacks chosen were crisps, biscuits and chocolate. Many perceived healthier snacks as highlighted – only accounted for between 0-2%.

The Top 5

- **Crisps**: 22%
- **Biscuits**: 19%
- **Chocolate**: 16%
- **Fresh Fruit**: 13%
- **Cake**: 10%

**Between 0-2%**
- Protein balls / bites
- Dried fruit
- Rice cakes
- Popcorn
- Seeds
- Fresh vegetable snack(s)
- Granola bar
- Popped snacks
- Vegetable based dried snacks

*Base: UK nat rep n=1,000*
This highlights that real tensions exist that are still not being fully addressed for consumers.
Getting behind these tensions is key

CHOICE

Understanding the choices people make and in the context they are in allows to start understanding behavioural norms for snacking
Choice Architecture For Snacking

In creating this choice architecture for snacking, or needstates wheel, we start to understand the different motivations and tensions that consumers experience at different points in time which can influence snacking behaviour.
Choice Architecture For Snacking

For a treat; pure enjoyment (Indulge) 53%
Simply to satisfy my hunger pangs (Survive) 44%
Energy boost to keep me going (Fuel) 38%
Fill me up and sustain me (Fuel) 33%
Comfort me / feel good (Indulge) 32%
Something new / a new experience (Explore) 19%
Enjoy and share along with others (Share) 18%
I choose it for its health benefits (Enhance) 16%
Basic nutrition my body needs (Survive) 13%
Guilt-free feel-good option (Enhance) 13%
Something that makes me look good (Explore) 6%
Nurture or provide for others (Share) 6%

Which of these are typically important to you when it comes to choosing snacks?

These statements highlight indulgence, survival and fuelling as key reasons to snack.
New products launched in the UK and Ireland claiming to be high in protein increased by 257% between 2011 and 2015.

(Mintel, 2016)
There was a 124% increase in snack food products launched in the UK and Ireland claiming to have low, no or reduced sugar between 2011 and 2015 (Mintel, 2016)
Health is now driving NPD in the snacking category

Healthy Snacking now accounts for 10% of the category, but it is in double digit growth?? (Nielsen, 2016)
There is STILL room for more NPD in snacking!

Low, or reduced fat calorie or sugar version accounted for less than 10% of NPD in 2016

(Mintel, 2017)
People are looking for healthier version of the snacks they love...
2. Healthy snacking: key influencers
Key to understanding snacking we need to understand how we live today
A changing home environment

The way it was

The 1980s brought us the Sodastream and the most recent decade the Nutribullet. Changing technological development is enabling a healthier way of eating.

The way it is
The channels of influence have evolved.
Information is available at our fingertips and opened up a whole world of food education.

21 Top Food Bloggers
Centennials and Millennials are more aware and conscientious often embracing the environment and more natural food offerings. Just Eat has predicted that plant based food options are set to be the food trend of 2018. According to a recent Just Eat study in 2017 there was a 987% increase in demand for vegetarian options and 33% of all Just Eat Restaurant Partners now provide vegan and vegetarian options on their menus.
The rise of health hedonism and the health-centric generation

“I get up at the unthinkable hour of 5am to make my favourite yoga class and I catch up with friends at the barre before we go out for a drink. Detox then retox. It’s become the new socializing for many of my friends and we are not alone.”

Fiona Wilson, The Times, March 2017

According to the Nielsen Global Health and Wellness Survey, 4 in 10 of Gen z now want to spend more on health products.
The way we live … our lives in flux

The Bord Bia Consumer Lifestyle Programme highlights how our busy lives just get busier. With that has come a demand for on the go food but food that is better for us is now more the norm- to give us the right energy.

Multitasking lifestyles are changing the way we eat – we are seeing the rise of the meal snack according to Mintel and also the rise of short cut solutions that are still fresh nutritious and customisable. “Biohacking” food and drink that offers complete nutrition in convenient formats is likely to become more the norm.
3. Snackers today, their repertoire, occasions and relationships with snacking
We have created four interlocking factors when looking at snacking:

1. The occasion
   What day and time is it, and what’s going on in their life more widely?

2. The person
   What is their general outlook on healthy eating and snacking?

3. The motivation
   Are there specific reasons for having a snack at this time?

4. The snack type
   Which types of snacks are under consideration or being consumed with everything else in mind?
1. The occasion
Three meals a day routine is on the way out

Over 70% snack each day

Eating at mealtimes only more a factor for older people

65+ 43%
Under 65 24%

Meals plus one or two snacks most common

More than 2 in 3 snackers

Has between 3 and 5 eating occasions in a day

Whether it’s impulse or planned, people tend to snack twice a day

Planned snacks tend to be healthier while impulse snacking makes it harder to manage temptation

Base: UK Nat Rep n=1000, IRL Nat Rep n=1004
3 in 5 snacks are eaten between mid-morning and afternoon
Classic 11am and 3pm snacks are very prominent in Ireland

Time of day snacks eaten:

- **Early Morning:** 1% - 2%
- **Mid-Morning:** 4% - 4%
- **Afternoon:** 6% - 7% - 7%
- **Evening:** 5% - 6% - 7% - 5%
- **Night:** 2% - 0% - 1%

Base: IRL Nat Rep n=1004
Across all occasions, unhealthy snacks dominate

The top five snack types are much the same across the day

1. Choc / Sweets / Treats
2. Crisps / Popcorn
3. Biscuits / Buns / Cakes
4. Fresh Fruit & Veg /pots
5. Yoghurt / Dairy Drinks

However, there are differences across the time of day based on types of snack and motivations

Base: UK Snackers Aged 18-54: n=1000
The Mid-Morning Snack Occasion

Who is most likely to be snacking on this occasion?

ABC1

Snacking at work (35%)

With colleagues (20%)

Those who plan snacks in advance (33%)

Top 5 Snacks Eaten throughout the day:

1. Crisps/Popcorn - 66%
2. Choc/Sweets/Treats - 65%
3. Biscuits/Buns/Cakes - 61%
4. Fresh Fruit & Veg/pots - 55%
5. Yoghurt/Dairy Drinks - 44%

More likely to be eaten at this time than other times:

1. Fresh Fruit & Veg/pots - 55%
2. Yoghurt/Dairy Drinks - 44%
3. Smoothies/Juices - 29%
4. Granola/Flapjacks - 25%
5. Rice/Corn Cakes - 20%
6. Protein bars/balls - 17%

Base: UK Snacks eaten in Morning n=507
The Mid-Morning Snack Occasion

More about this

**Basic Nutrition**
I wanted the basic nutrition my body needs
(26% feel Healthy after this snack)

Less about this

**Indulging**
I bought it to comfort me and make me feel good
It was for a treat, pure enjoyment

The mid-morning snack is when healthier people are more likely to snack, and the time when healthy snacks are most likely to be consumed. Often at work and in the company of other people. This occasion is the one least associated with indulgence and is often about fuelling.

n=507 (Snacks eaten in Morning)
The afternoon snack occasion

Who is most likely to be snacking on this occasion?

Actively looking for recommendations on healthy snacks

27% went and bought the snack specifically when they needed it

Top 5 Snacks Eaten throughout the day:

1. Choc/ Sweets/ Treats 66%
2. Crisps/ Popcorn 62%
3. Biscuits/ Buns/Cakes 61%
4. Fresh Fruit & Veg /pots 57%
5. Yoghurt/ Dairy Drinks 44%

More likely to be eaten at this time than other times:

1. Fresh Fruit & Veg /pots 57%
2. Nuts, seed and trail 36%
3. Dried Fruit & Veg Crisps (e.g. kale, beetroot) 19%
The afternoon snack occasion

**Motivation**

More about this

**Fuelling**

I needed an energy boost
(20% felt energised after they had their snack)

Broadly in line with other occasions otherwise

Often associated with overcoming the mid-afternoon slump by giving an energy boost. Lots of the people snacking at this time are interested in recommendations on healthy snacks. Not the same range of healthy snacks consumed as the mid-morning occasions however

n=474 (Snacks eaten in Afternoon)
The evening/night snack occasion

Who is most likely to be snacking on this occasion?

- 45-54 age group (36%)
- Those less concerned with calorie content (36%)
- Good intentions to eat healthily (45%)
- Those with less structured eating routines

Top 5 Snacks Eaten throughout the day:

1. Choc/ Sweets/ Treats 74%
2. Crisps/ Popcorn 72%
3. Biscuits/ Buns/Cakes 60%
4. Fresh Fruit & Veg/pots 43%
5. Yoghurt/ Dairy Drinks 33%

More likely to be eaten at this time than other times:

- Chocolate / sweets & treats 72%
- Crisps / Popcorn / Potato & Corn Snacks 72%

Base: UK Snacks eaten in Evening/Night n=375
The evening/night snack occasion

More about this

**Indulging**
- I bought it to comfort me or make me feel good
- It was a treat, pure enjoyment

Less about this

**Energising / Surviving**
- Under-indexing for feeling, fulfilled (16%) and energised (7%)

This is the classic unhealthy snack occasion, when chocolate, sweets, crisps and popcorn come to the fore. It is a time when those not quite so healthy (good intentions) are likely to treat themselves and indulge.

n=375 (Snacks eaten in Evening/Night)
Notable rise in evening/night snacking at the end of the week and the weekend

<table>
<thead>
<tr>
<th>Day</th>
<th>Mid Morning (10-12am)</th>
<th>Afternoon (2-4pm)</th>
<th>Evening/Night (7-10pm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>25%</td>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>Monday</td>
<td>25%</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>17%</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Wednesday</td>
<td>24%</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td>Thursday</td>
<td>23%</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>Friday</td>
<td>21%</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Saturday</td>
<td>18%</td>
<td>31%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Base: UK Snackers Aged 18-54: n=1000
“Sometimes I go to bed early just because I know if I stay downstairs, I’ll eat toast”

The Twilight Zone is fraught with risk (and opportunity!) ...this is a time when peoples barriers are down – and are often trying to be good but can find it hard to resist! There is a real opportunity to create a better for you snack at this time.
2. The person

Base: UK nat rep n=2,000; Irl nat rep n=1,004
People sit on a spectrum of health-consciousness when it comes to food and snacking as this slide showed us earlier. Over the coming slides we will explore these people in more detail.

The person:

- **Disciplined**: I carefully manage my food and consider myself a very healthy eater.
- **Trying hard**: I eat healthily most of the time but do sometimes slip and eat unhealthy food / snacks.
- **Good intentions**: I have good intentions to eat healthily but am only successful some of the time.
- **Guilt-free**: I tend not to worry about which foods are healthy and just eat what I enjoy.

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disciplined</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Trying hard</td>
<td>36%</td>
<td>56%</td>
</tr>
<tr>
<td>Good intentions</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>Guilt-free</td>
<td>21%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: UK nat rep n=2,000; Irl nat rep n=1,004
Most consumers are trying to eat healthier

While there are varying levels of commitment, 8 in 10 of the general population in the UK are trying to eat healthily.

In Ireland, 9 in 10 say they are trying to eat healthily, with just 1 in 10 not eating without regard to health concerns.

Snack types eaten more than once a week (UK) – illustrates that large proportion of the population are eating healthy snacks

<table>
<thead>
<tr>
<th></th>
<th>Disciplined</th>
<th>Trying hard</th>
<th>Good intentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh fruit &amp; veg and veg snacks/veg pots</td>
<td>46%</td>
<td>46%</td>
<td>29%</td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td>29%</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>Smoothies / Fresh fruit or veg juices</td>
<td>22%</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>Nuts/seeds/ trail mixes</td>
<td>29%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Rice cakes/corn cakes</td>
<td>19%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Granola / flapjacks</td>
<td>14%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Dried fruit and veg crisps</td>
<td>14%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Protein bars/balls</td>
<td>18%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Meat snacks / jerky</td>
<td>10%</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: UK nat rep n=1,000; Irl nat rep n=1,004

Base: UK snackers aged 18-54 n=1,000
Summary of all snacks eaten MORE than once a week. In this fresh fruit and veg snacks scored highest

<table>
<thead>
<tr>
<th>Snack Category</th>
<th>Total</th>
<th>Disciplined</th>
<th>Trying Hard</th>
<th>Good Intentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh fruit &amp; veg snacks/veg pots</td>
<td>39 %</td>
<td>46 %</td>
<td>46 %</td>
<td>29 %</td>
</tr>
<tr>
<td>Chocolate / sweets and treats</td>
<td>35 %</td>
<td>23 %</td>
<td>28 %</td>
<td>47 %</td>
</tr>
<tr>
<td>Crisps / Popcorn / Potato and corn snacks</td>
<td>34 %</td>
<td>22 %</td>
<td>31 %</td>
<td>41 %</td>
</tr>
<tr>
<td>Biscuits / buns / pastries &amp; cakes</td>
<td>27 %</td>
<td>20 %</td>
<td>22 %</td>
<td>35 %</td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td>25 %</td>
<td>29 %</td>
<td>28 %</td>
<td>19 %</td>
</tr>
<tr>
<td>Smoothies / Fresh fruit or veg juices (fresh only / made at home)</td>
<td>18 %</td>
<td>22 %</td>
<td>21 %</td>
<td>13 %</td>
</tr>
<tr>
<td>Nuts, seeds and trail mixes</td>
<td>15 %</td>
<td>29 %</td>
<td>17 %</td>
<td>10 %</td>
</tr>
<tr>
<td>Granola / flapjacks</td>
<td>9 %</td>
<td>14 %</td>
<td>9 %</td>
<td>7 %</td>
</tr>
<tr>
<td>Dried fruit and veg crisps (e.g. kale, beetroot)</td>
<td>9 %</td>
<td>14 %</td>
<td>11 %</td>
<td>5 %</td>
</tr>
<tr>
<td>Rice cakes/corn cakes</td>
<td>9 %</td>
<td>19 %</td>
<td>9 %</td>
<td>6 %</td>
</tr>
<tr>
<td>Protein bars/balls</td>
<td>6 %</td>
<td>18 %</td>
<td>7 %</td>
<td>3 %</td>
</tr>
<tr>
<td>Meat snacks / jerky / biltong</td>
<td>5 %</td>
<td>10 %</td>
<td>5 %</td>
<td>4 %</td>
</tr>
</tbody>
</table>

Base: UK snackers aged 18-54 n=1,000

Disciplined: 8%
Trying hard: 36%
Good intentions: 34%
### Summary of all snack categories eaten past week

<table>
<thead>
<tr>
<th>Snack Category</th>
<th>UK N=1001 snackers 18-54</th>
<th>Ireland N=564 snackers 18-54</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate / sweets and treats</td>
<td>64%</td>
<td>61%</td>
</tr>
<tr>
<td>Crisps / Popcorn / Potato and corn snacks</td>
<td>63%</td>
<td>51%</td>
</tr>
<tr>
<td>Biscuits / buns / pastries &amp; cakes</td>
<td>57%</td>
<td>54%</td>
</tr>
<tr>
<td>Fresh fruit &amp; veg and veg snacks/veg pots</td>
<td>50%</td>
<td>48%</td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Nuts, seeds and trail mixes</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>Smoothies / Fresh fruit or veg juices (fresh only / made at home)</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Granola / flapjacks</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Rice cakes/corn cakes</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Dried fruit and veg crisps (e.g. kale, beetroot)</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>Protein bars/balls</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Meat snacks / jerky / biltong</td>
<td>10%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Base:** UK snackers aged 18-54 n=1,000
This is all about weekly debits and credits for all consumers.

Starting the week with good intentions - there is often a “regime” until what is called “hump day” which is Wednesday.

Thursday starts to become more weekend focused. Saturday and Sunday all bets are off, with Sunday allowances depending on what happened on Saturday!

There is also a daily Credit/Debit system with most consumers trying to “start with a good breakfast” and “staying good” until 8pm when they are more likely to sneak a treat.

I’ll cycle my exercise bike for an hour in front of *Eastenders*, so I can have wine...
Group 1 – Disciplined (8%)

‘I carefully manage my food and consider myself a very healthy eater’

Younger and the most active, this group are engaged with healthy eating – more likely to explore, prepare and spend to achieve healthy outcomes. Protein is a priority for many – snacking has increased but this frequently is healthy snacking.

Base: UK snackers aged 18-54 n=1,000
Group 1 – Disciplined (8%)

‘I carefully manage my food and consider myself a very healthy eater’

- 61% Male
- 39% Female
- 70% ABC1

Age Groups:
- 18-24
- 25-34
- 35-44
- 44-55+

Top 5 snack types eaten in the past week:

<table>
<thead>
<tr>
<th>Snack Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh fruit &amp; veg and veg snacks / veg pots</td>
<td>51%</td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td>44%</td>
</tr>
<tr>
<td>Biscuits / buns / pastries &amp; cakes</td>
<td>42%</td>
</tr>
<tr>
<td>Chocolate / sweets and treats</td>
<td>38%</td>
</tr>
<tr>
<td>Nuts, seeds and trail mixes</td>
<td>37%</td>
</tr>
</tbody>
</table>

Base: UK snackers aged 18-54 n=1,000
Group 2 – Trying Hard (36%)

‘I eat healthily most of the time but sometimes slip and eat unhealthy food/snacks’

More likely to

- Be active / participate in sports
- Try new types of snacks (66%)
- Have meals with 1 or 2 snacks (70%)
- Subscribe to ‘food as fuel’ mentality
- Want nutritional info displayed on packs (62%)
- Look for shortcuts to good health
- Allow health benefits to drive snack choice
- Compromise on taste for healthy eating (47%)

Less likely to

- Strong desire to be healthy and this drives their choices, but also quite likely to slip and eat unhealthier foods.

Base: UK snackers aged 18-54 n=1,000
Group 2 – Trying Hard (36%)

‘I eat healthily most of the time but sometimes slip and eat unhealthy food/snacks’

Top 5 snack types eaten in the past week

<table>
<thead>
<tr>
<th>Snack Types</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crisps / Popcorn / Potato and corn snacks</td>
<td>63%</td>
</tr>
<tr>
<td>Chocolate / sweets and treats</td>
<td>62%</td>
</tr>
<tr>
<td>Fresh fruit &amp; veg and veg snacks / veg pots</td>
<td>57%</td>
</tr>
<tr>
<td>Biscuits / buns / pastries &amp; cakes</td>
<td>55%</td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td>42%</td>
</tr>
</tbody>
</table>

Base: UK snackers aged 18-54 n=1,000
Group 3 – Good Intentions (34%)

‘I have good intentions to eat healthily but am only successful some of the time’

More likely to:
- See snacks as treats and indulgence
- Graze throughout the day
- Keep up with healthy eating trends (20%)
- See snacks as a source of nutritional benefit they would not otherwise get
- Be active (only 25%)

Less likely to:
- Source info about snacks & snacking
- Subscribe to ‘food as fuel’ mentality
- Less active and health driven – some aspiration to be healthy but less commitment. Snacks more about indulgence.

Base: UK snackers aged 18-54 n=1,000
Group 3 – Good Intentions (34%)

‘I have good intentions to eat healthily but am only successful some of the time’

Top 5 snack types eaten in the past week

<table>
<thead>
<tr>
<th>Snack Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate / sweets and treats</td>
<td>74%</td>
</tr>
<tr>
<td>Crisps / Popcorn / Potato and corn snacks</td>
<td>70%</td>
</tr>
<tr>
<td>Biscuits / buns / pastries &amp; cakes</td>
<td>63%</td>
</tr>
<tr>
<td>Fresh fruit &amp; veg and veg snacks / veg pots</td>
<td>42%</td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td>35%</td>
</tr>
</tbody>
</table>

Base: UK snackers aged 18-54 n=1,000
3. The motivation

Base: UK nat rep n=2,000; Irl nat rep n=1,004
People’s snacking habits are triggered by a mix of motivations.

**Enhancing**
- Finding new snack inspirations to try
- Feeling better about myself

**Surviving**
- Basic Needs
- Overlap – nutrition and sustenance

**Exploring**
- Finding new snack inspirations to try
- Lovefood

**Indulging**
- The enjoyment and reward factor of snacking
- Lovefood
The choice architecture for snacking: A reminder of the motivations relating to snack choice.
In general, indulgence followed by surviving are the primary motivations for snacking.

- For a treat; pure enjoyment (Indulge) 53%
- Simply to satisfy my hunger pangs (Survive) 44%
- Energy boost to keep me going (Fuel) 38%
- Fill me up and sustain me (Fuel) 33%
- Comfort me / feel good (Indulge) 32%
- Something new / a new experience (Explore) 19%
- Enjoy and share along with others (Share) 18%
- I choose it for its health benefits (Enhance) 16%
- Basic nutrition my body needs (Survive) 13%
- Guilt-free feel-good option (Enhance) 13%
- Something that makes me look good (Explore) 6%
- Nurture or provide for others (Share) 6%
Attitude to health makes for differing motivations

Disciplined  8%
Trying hard  36%
Good intentions  34%

The **disciplined** group have the most balanced set of motivations – not as strong on surviving and indulging, but a more rounded set of factors.

The **trying hard** group is strongly motivated by indulging and surviving, it shares the motivation for enhancing with the disciplined group.

The **good intentions** group skew strongly towards indulging, followed by surviving, but is lowest on other motivations.
Different snack groups relating to different motivations

- **Fuelling 31%**
  - Protein Bars/Balls: 49%
  - Smoothies/Juices: 48%
  - Fruit & Veg: 44%
  - Meat snacks: 19%
  - Crisps/Popcorn: 13%
  - Choc/treats: 12%

- **Surviving 42%**
  - Granola/Flapjacks: 58%
  - Crisps/Popcorn: 51%
  - Chocolate/sweets/treats: 22%

- **Enhancing 31%**
  - Fruit & Veg: 58%
  - Smoothies/Juices: 52%
  - Rice Cakes/Corn Cakes: 42%
  - Yoghurts/Dairy drinks: 40%
  - Granola/Flapjacks: 20%
  - Biscuits/buns: 8%
  - Crisps/Popcorn: 6%
  - Choc/treats: 1%

Enhancing is particularly differentiating on snack type

**UK Snacks n=1913**
Consumption of healthier snacks motivated more by sharing and exploring

Sharing (new experience and looking well to others) is a motivation for some of the relatively newer and more trend-based snacks

UK Snacks n=1913
Snack types and needstates to which they most relate (1)

<table>
<thead>
<tr>
<th>Snack Types</th>
<th>Try something new</th>
<th>Make me look well to others</th>
<th>Nurture or provide for others</th>
<th>Enjoy and share along with others</th>
<th>To comfort me and make me feel good</th>
<th>A treat; pure enjoyment</th>
<th>For health benefits</th>
<th>Guilt-free option – made me feel good</th>
<th>Basic nutrition my body needs</th>
<th>Energy boost to keep me going</th>
<th>To fill me up and sustain me</th>
<th>Simply to satisfy hunger pangs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protein bars / balls</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meat snacks / jerky / biltong</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dried fruit and veg crisps</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Granola / flapjacks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rice cakes / corn cakes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nuts, seeds &amp; trail mixes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

UK Snacks n=1913
## Snack types and needstates to which they most relate (2)

<table>
<thead>
<tr>
<th></th>
<th>Try something new</th>
<th>Make me look well to others</th>
<th>Nurture or provide for others</th>
<th>Enjoy and share along with others</th>
<th>To comfort me and make me feel good</th>
<th>A treat; pure enjoyment</th>
<th>For health benefits</th>
<th>Guilt-free option – made me feel good</th>
<th>Basic nutrition my body needs</th>
<th>Energy boost to keep me going</th>
<th>To fill me up and sustain me</th>
<th>Simply to satisfy hunger pangs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smoothies/ fresh fruit or veg juices</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yoghurt / dairy drinks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh fruit &amp; veg / veg snacks or pots</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crisps/popcorn / potato or corn snacks</td>
<td><strong>Red</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Red</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chocolate / sweets &amp; treats</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Biscuits / buns / cakes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. The snack type

Which types of snacks are under consideration or being consumed, with everything else in mind?

Base: UK nat rep n=2,000; Irl nat rep n=1,004
The twin desires of indulgence and trying to be healthy are a constant battle.

I try to choose snacks that are healthy...

Agree 54%

Disagree 20%

I use snacks as a treat between meals...

Agree 67%

Disagree 15%
### Key drivers of product choice: the spectrum view

<table>
<thead>
<tr>
<th><strong>Taste</strong></th>
<th><strong>Ingredients</strong></th>
<th><strong>Packaging</strong></th>
<th><strong>Value</strong></th>
<th><strong>Brand</strong></th>
<th><strong>Origin</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A hygiene factor – won’t repurchase if don’t like taste</td>
<td>Front and centre – especially healthy snacks; call out key ingredients</td>
<td>Must communicate taste as well as benefits – Eat with their eyes</td>
<td>Expect to pay more for healthy snacks</td>
<td>Less of a consideration due to proliferation of new brands</td>
<td>Less likely to be questioned – In Ireland Irish a bonus but not essential</td>
</tr>
<tr>
<td>“You want to like what you eat”</td>
<td>“What’s in it and what isn’t in it”</td>
<td>“I can just tell that’s good for me”</td>
<td>“Some prices are very high”</td>
<td>“You see new brands all the time”</td>
<td>“To be honest I don’t check”</td>
</tr>
</tbody>
</table>
Taste is king

I’d like to buy healthy snacks but they tend to be too expensive for me

- All: 50%
- Disciplined: 53%
- Trying hard: 47%
- Good intentions: 53%

I would eat healthier snack foods if they tasted better

- All: 64%
- Disciplined: 62%
- Trying hard: 61%
- Good intentions: 69%

Base: UK Snackers Aged 18-54: n=1000
In looking at health versus expense some of the healthiest snacks are actually less expensive and more frequently consumed relative to other health snacks (fruit and yoghurt) – this could suggest that price point is also keeping people out of healthy snacks.

<table>
<thead>
<tr>
<th>Health</th>
<th>Expensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit &amp; Veg</td>
<td>Crisps / Popcorn</td>
</tr>
<tr>
<td>Rice / Corn Cakes</td>
<td>Chocolate / Sweets / Treats</td>
</tr>
<tr>
<td>Dried Fruit &amp; Veg Crisps</td>
<td>Biscuits / Buns / Pastries &amp; Cakes</td>
</tr>
<tr>
<td>Meat snacks/ jerky/biltong</td>
<td>Protein Bars/Balls</td>
</tr>
<tr>
<td>Nuts / Seeds / Trail</td>
<td>Smoothies / Juices</td>
</tr>
<tr>
<td>Granola / Flapjacks</td>
<td>Yoghurt / Dairy Drink</td>
</tr>
</tbody>
</table>

Base: UK Snackers Aged 18-54: n=1000
Indulgence with a healthy halo

- The *Fulfil* effect is evidence of the success of building a product that serve both the *Indulgent* and *Surviving* motivations – tasty first and healthy second

- Applying the traditional rules of confectionery to a healthy snack has worked well
4. Purchasing habits and behaviours
Where are people purchasing snacks?

<table>
<thead>
<tr>
<th>Store Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Supermarkets</td>
<td>86%</td>
</tr>
<tr>
<td>Convenience Stores</td>
<td>38%</td>
</tr>
<tr>
<td>Express Supermarkets</td>
<td>35%</td>
</tr>
<tr>
<td>Corner Shops</td>
<td>29%</td>
</tr>
<tr>
<td>Boots / Superdrug/other pharmacy</td>
<td>14%</td>
</tr>
<tr>
<td>Health Stores</td>
<td>13%</td>
</tr>
<tr>
<td>Specialist Sports Supplements</td>
<td>7%</td>
</tr>
</tbody>
</table>

- **Large Supermarkets**
  - By far the most common place to buy snacks
  - Tend to be eaten at home
  - Older cohort over indexing

- **Convenience Stores/Express Supermarkets / Corner Shops**
  - Buying for snacks at work & on the go
  - Mostly full time workers
  - Their shopping has increased a lot (10%)
  - Over indexing for impulse buying snacks

- **Health & Specialist Sports Stores**
  - Health enthusiasts (the disciplined)
  - Clean & high protein more important to group
  - Buying snacks for after exercise & sports
  - Protein Bars/Balls, Meat Snacks & Rice/Corn Cakes bought too

UK Total Sample n=1000, snack instances n=1913
Impulsive snacking strongest in home – particularly at weekend

43%

It was something I had entirely on impulse

Who are they?

- Snacking at home (66%)
  - Less health conscious, have good intentions (46%)
- Over indexing on the unhealthy snacks: Crisps/Popcorn/Corn Snacks, Choc/ Sweets & Treats
- Mostly snacking at the weekend (39%)

29%

I did not specifically plan it, but it is a time when I regularly snack

Who are they?

- Trying hard 56%
- Mostly snacking at work – 35%

28%

I had planned in advance to have this snack

Who are they?

- Over-indexing for regularly working out & managing their food
  - 63% buy in advance or prepare snacks at home
- Snacking more on: Smoothies / Juices
  - Yoghurt / Dairy Drinks
  - Fresh Fruit & Veg Snacks/Pots

UK Total Sample n=1000, snack instances n=1913
Benefits are still across the basics of sugar, fat and calories: Reduce, remove, replace!

When choosing a snack for healthy benefits, which ones are of most importance to you?

**Most important benefits**

- Low sugar: 66%
- Low fat: 56%
- Calories: 54%
- Low salt: 36%
- High protein: 35%
- Additive free: 26%
- Clean: 23%
- Raw: 5%

*Note – for the disciplined group, the presence of protein becomes much more important and is equal top with low sugar*

*Base: UK Snackers Aged 18-54: n=1000*
Packaging plays a critical role in determining whether a snack is perceived as healthy or not.

"Before I even look at what a snack is, I can usually tell by the packaging if it is healthy or not."

Agree 52%
Disagree 18%
Ideal Packaging for a healthy snack should have:

- Visual of finished product - increase appeal
- Natural colours - no bold garish colours
- Been made of more natural materials, cardboard or matt finish
- High quality food /ingredient imagery
- Short ingredient deck
- Benefits clearly identifiable on front
- Use descriptors as a shortcut
- Not too busy on front
- Portionability

Base: UK snackers aged 18-54 n=1,000
A brand that’s got packaging right - Graze

Window to show the food inside; increase appeal

Natural colours & images gives less processed cues

Health Benefit clearly identifiable & quantified e.g. 9g protein

Natural packaging type; cardboard & matt

Detailed flavour descriptor
POS is one of the main places people get their information about snacks.

33% say they get product information here, which places greater importance on the role of packaging.

Base: UK snackers aged 18-54 n=1,000
POS is one of the main places people get their information about snacks.

33% say they get product information here, which places greater importance on the role of packaging.

Base: UK snackers aged 18-54 n=1,000
What is healthy..?

Sometimes it’s about presenting people with an alternative!! Understanding the context of choice is important. If a Fulfil bar is beside a bar of chocolate..people might just pick it as the perceived healthier alternative.
Clarity of message is critical to eliminate confusion. The more health conscious people are the more help they need!

“It is essential to me that nutritional information is clearly displayed when I’m buying a healthy snack”

Agree 58%  Disagree 16%

Base: UK snackers aged 18-54 n=1,000
Existing packaging in the health space can raise questions

259cals/1088kJ

243cals/1020kJ

("Paula Norris, Dietitian AU (@movingdietitian) • Instagram photos and videos", 2017)
1 in 2 people want snacks they can split into portions

While people enjoy snacking and want to snack, 58% agree they are trying to limit their snacks (v 17% disagree). They want permission to snack, but to be able to do so in a controlled way.

Agree 47%
Disagree 22%

“It is important to me that snacks are divided into suitable sizes”

When planning snacks in advance, portion sizes can be controlled – the temptation to overindulge is on impulse.

Products that deliver on portion size and portability allow consumers to compose an eating occasion that fits their specific needs at the time.

Base: UK snackers aged 18-54 n=1,000
Future Focus
Snacking Trends
What the future holds: the rise of the super indulgent snack

As people subscribe to a more disciplined life for some of the week, they are likely to “super indulge” as a reward...this opens up an opportunity for truly indulgent products (Stylus, 2014)
Superluxe indulgence

New York-based Populence recently collaborated with New Zealand winery Kim Crawford wines on a range of wine-infused popcorns. The popcorns, Pinot Noir Chocolate Drizzle and Sauvignon Blanc Kettle, are designed to be paired with wine.

British yoghurt company The Collective regularly adds limited edition variants to its range of gourmet live yoghurts. The latest flavour, Raspberry and Amaretto, contains raspberries, honey and amaretto. The company has also partnered with British chef Anna Hansen of The Modern Pantry to create a series of recipes using the company's products.

(Stylus, 2014)
What the future holds: sustainability

Increased awareness and concern for the environment on a range of levels is going to create demand for more and more products that subscribe to a sustainable ethos covering packaging, manufacturing and ingredients used.
Insects snacks address not only sustainability but being high in protein they actually address a number of health needs.
What the future holds: functionality

As consumers look for functional snacks – there’s an opportunity to capitalise on a growing movement while serving consumers emerging health needs.
Addressing gut health and prebiotics are some of the newer territories in functional snack foods. Multi vits, powders or shots are all new formats carrying these food offerings.

Grapefruit & Apple Flavour
Folic Acid & Iron Candy (Japan)
New channels provide opportunities for brands to differentiate themselves and to work with busy lives.
Making healthy food convenient
5. Challenges and resolutions and into the future
From challenge to resolution

EMERGING OPPORTUNITIES
Opportunity

#1

Serving the reluctant compromiser

RESOLUTION

More options with taste!
Recognizing that taste is king!
Opportunity #2

Introducing them to the new world

RESOLUTION

Democratizing better choices: making healthy options more accessible to a wider audience
Opportunity #3

Supporting the cynical and confused!

**RESOLUTION**

1. Be authentic
2. Use real ingredients
3. Make it clear!

Provide the cues...
Opportunity #4

Facilitate identity badging

RESOLUTION

Creating relevance for your target markets
Opportunity #5

Tick-tock with the body clock

Create a portfolio of solutions to address the different daily and weekly needs
Opportunity #6

Grant permissible indulgences

Address the moments of risk with big consideration for evening time
Opportunity #7

Find the perfect partners

What’s the new milk & cookies? Creating new calls to action in snacking...
Opportunity

#8

Chunk it down!

New sizes: smaller snacks to facilitate self control
Opportunity

#9

Chunk it up!

RESOLUTION

New sizes to address life on the move. Meal snacks on the move!
Opportunity #10

Accessible aesthetics

RESOLUTION

Codes of colour to clearly highlight healthy versus treat..
Opportunity #11

Democratising health

RESOLUTION

Create better value health snacks
Information is the foundation of all of our work here at the Thinking House. So, our way of working is to always put our good thinking in context and give credit where it’s due. You can follow our train of thought in the references below.

References:


See reference above

Information is the foundation of all of our work here at the Thinking House. So, our way of working is to always put our good thinking in context and give credit where it’s due. You can follow our train of thought in the references below.

References:


See reference above
With thanks to visual sources: