The Thinking House

BORD BIA INSIGHT CENTRE

Healthy Snacking UK and Ireland

January 2018

Research Partner:

SPARK

The Strategic Research Agency

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

1 Situational Analysis

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

2 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



3 Workshops

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

4 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

Details of the quantitative elements

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

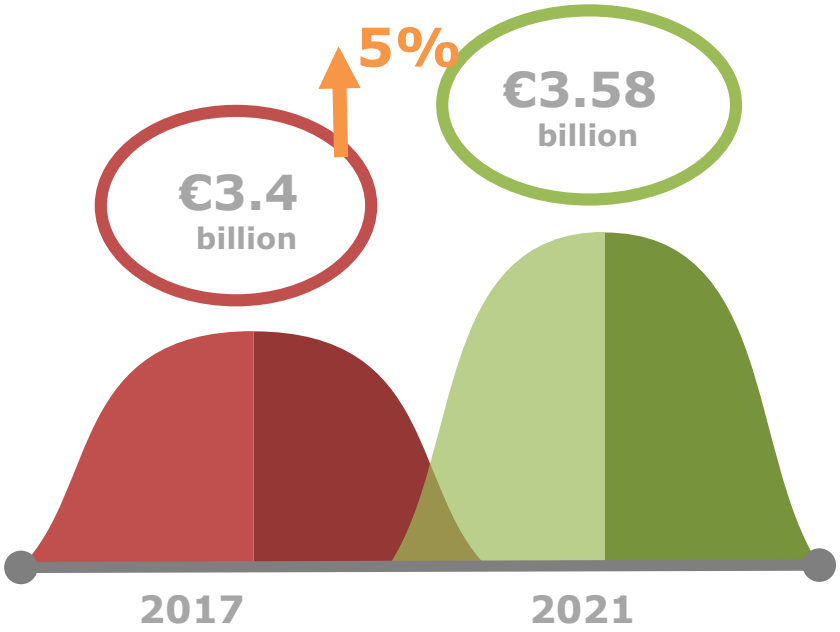
Flagged as: UK snackers aged 18-54 n=1,000



1. The world of snacking today: context and headlines

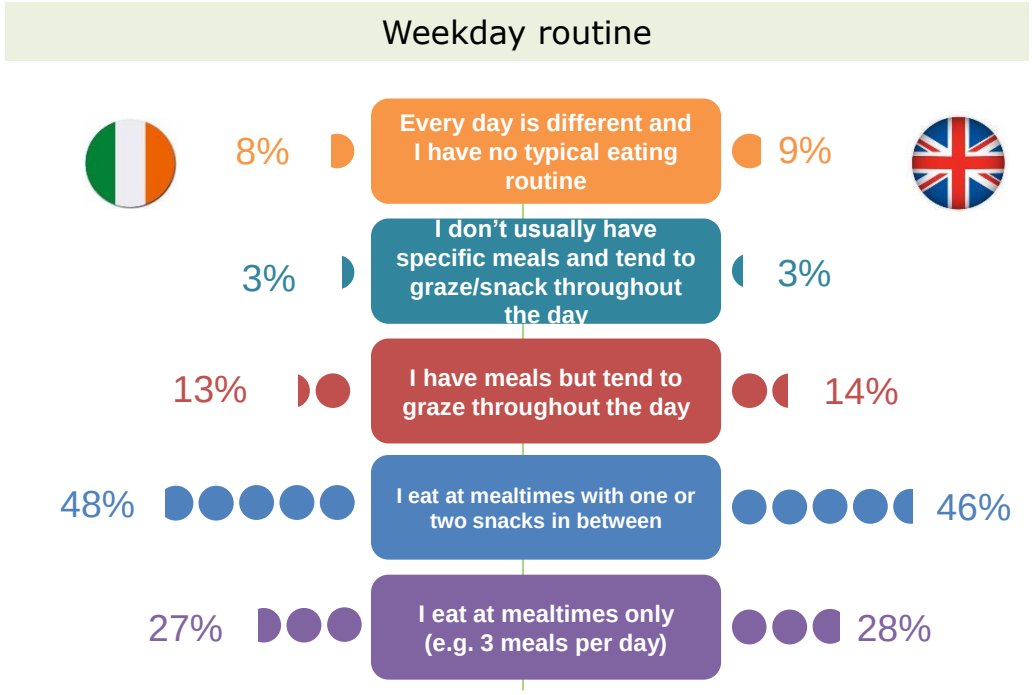
A sizeable bite – the snacking category today

The All Ireland Snacking Category (Mintel, 2016)



If snacking were a Super Product Category - it would be the 2nd largest in value ahead of both Alcohol and Tobacco and the 3rd fastest growing

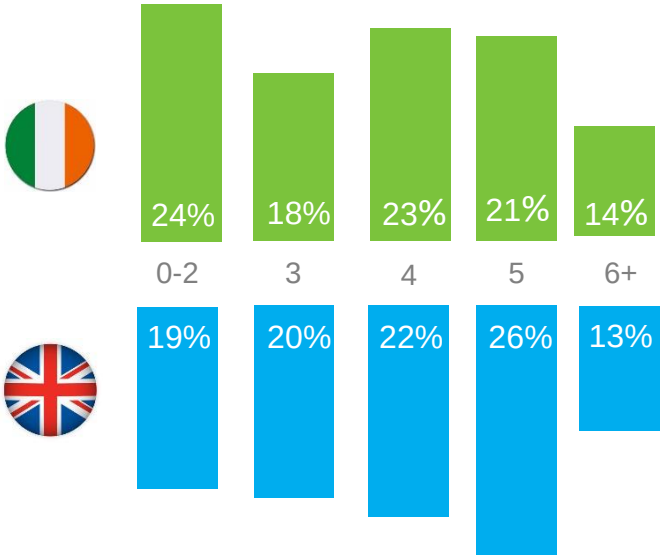
Over 70% of all consumers snack each day



Base: UK Nat Rep n=1000, IRL Nat Rep n=1004

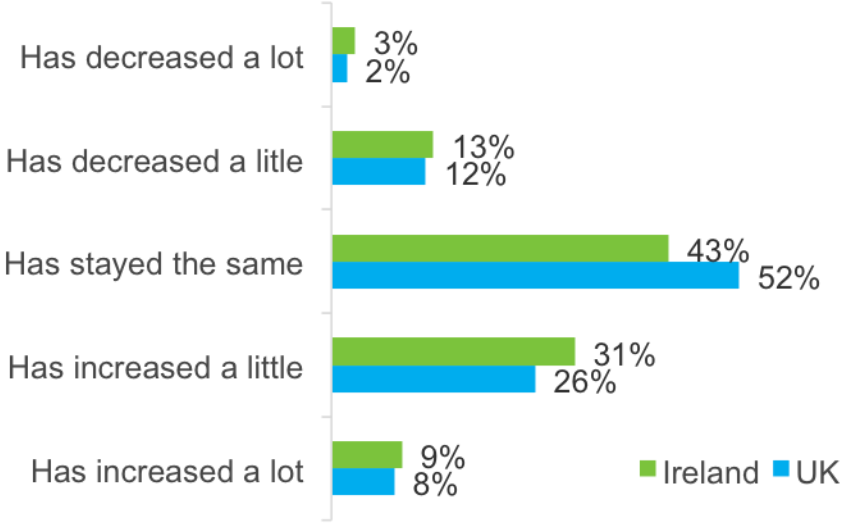
Number of eating occasions is rising

Number of eating occasions



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?



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.



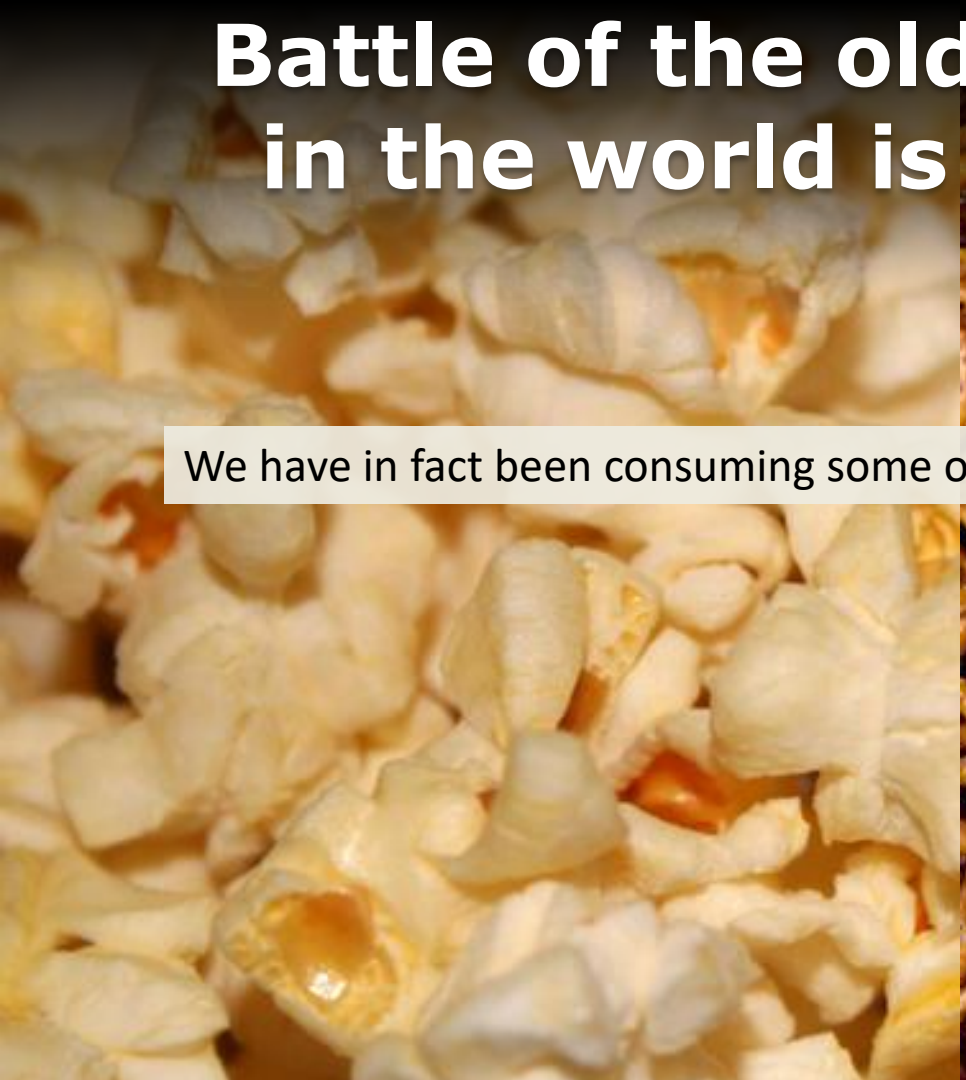
snack

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!





Images from istock

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)

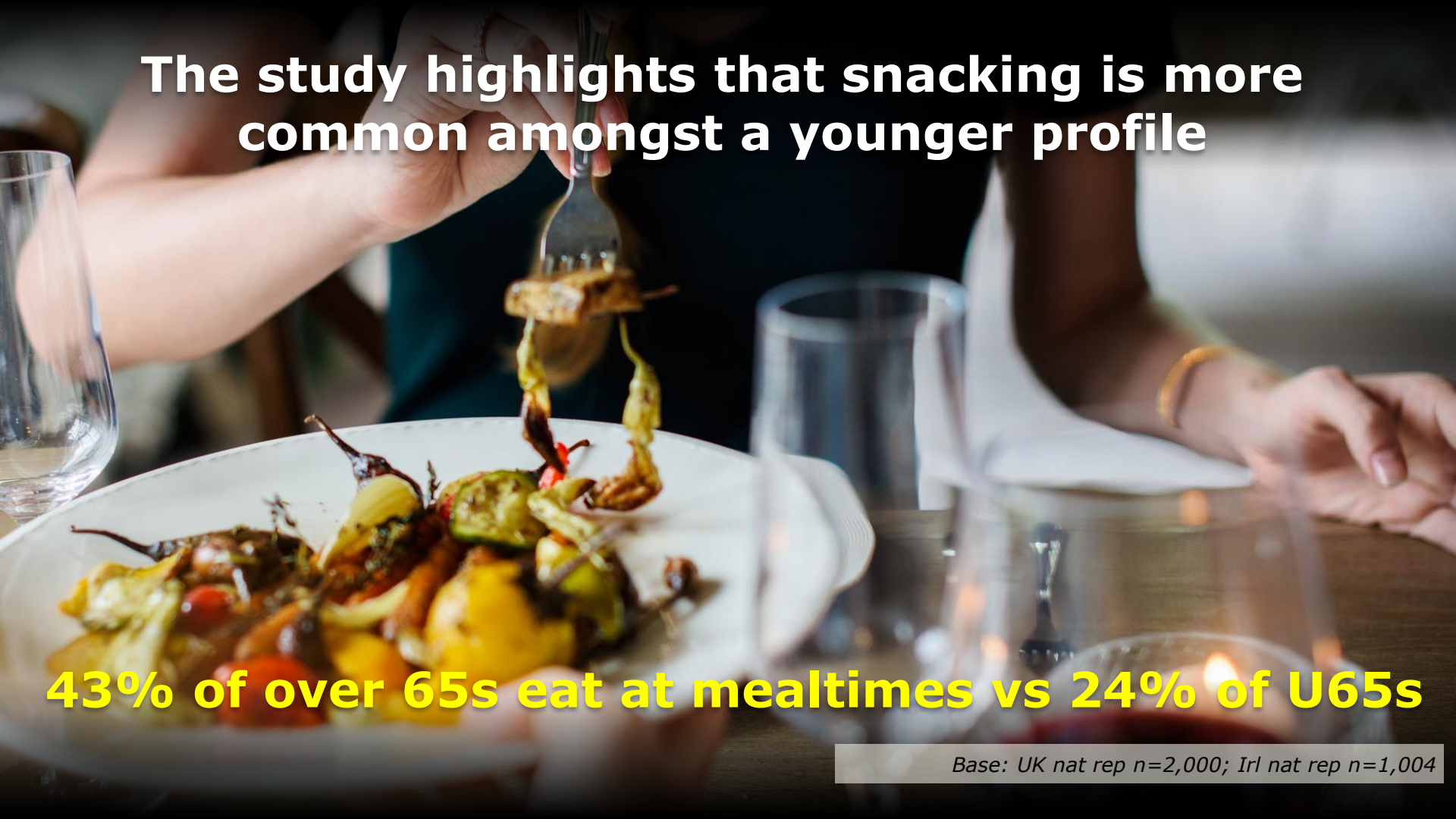






According to our study, 4 in 10 people in Ireland are snacking more often nowadays



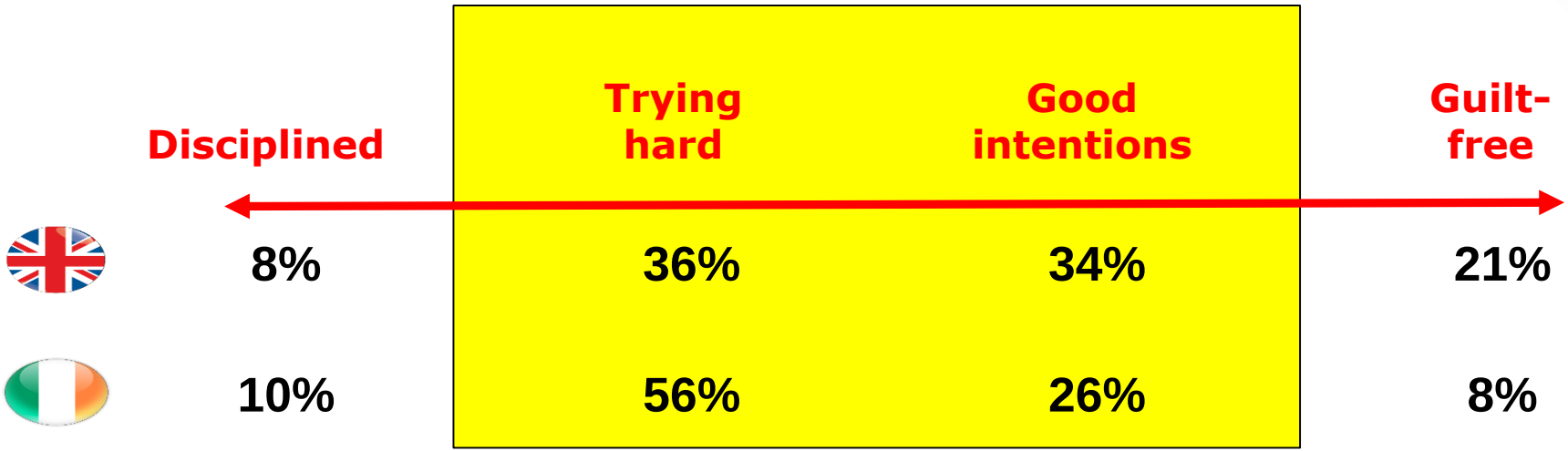

The study highlights that snacking is more common amongst a younger profile
43% of over 65s eat at mealtimes vs 24% of U65s
Base: UK nat rep n=2,000; Irl nat rep n=1,004



Just over 90% of Irish consumers worry about what they eat!

Base: UK nat rep n=2,000; Irl nat rep n=1,004

… and 3 in 4 are “Trying to be Good”



Base: UK nat rep n=2,000; Irl nat rep n=1,004

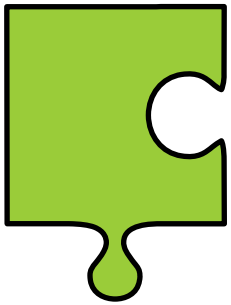
And yet crisps, biscuits and chocolate are still our favourite snacks…



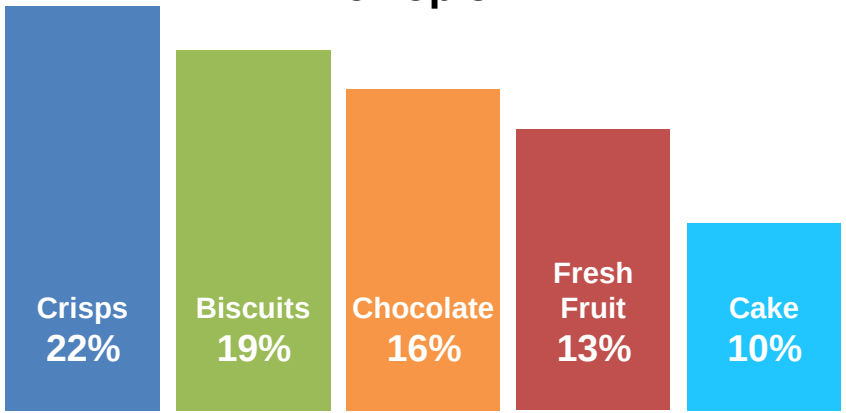
Base: UK nat rep n=1,000

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 snack type



The Top 5



Think about the last time you had a snack….

Protein balls / bites
Dried fruit
Rice cakes
Between 0-2%
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

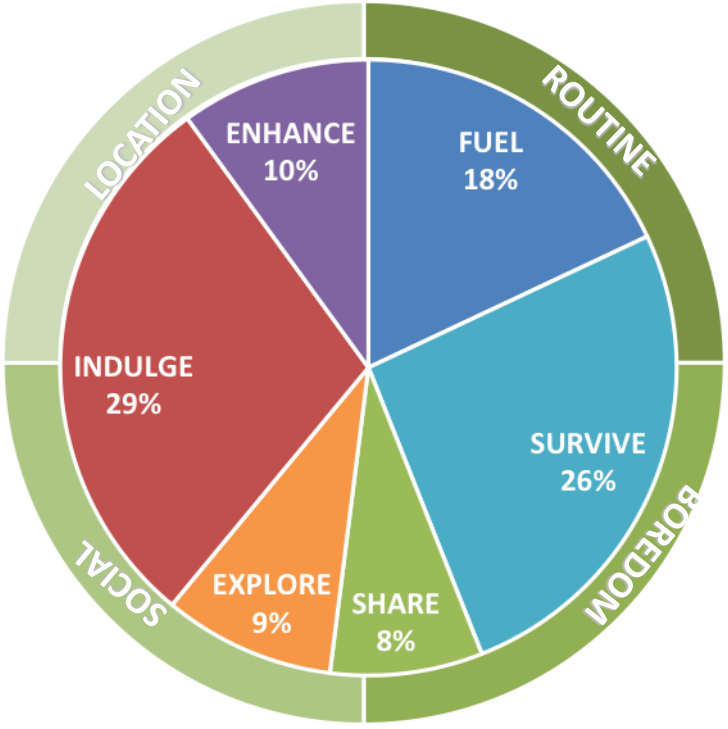
CONTEXT

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.

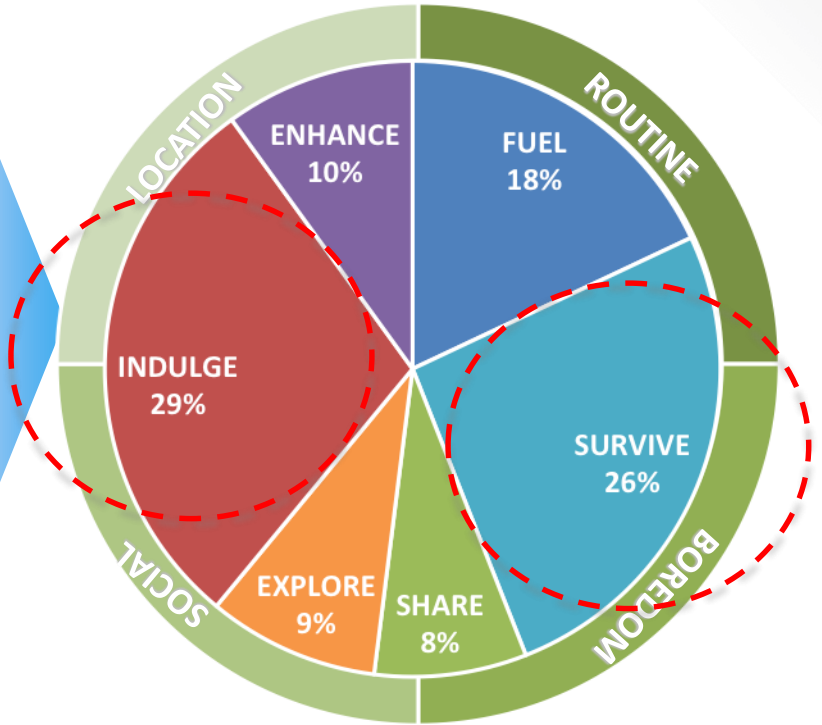
Which of these are typically important to you when it comes to choosing snacks?



Choice Architecture For Snacking

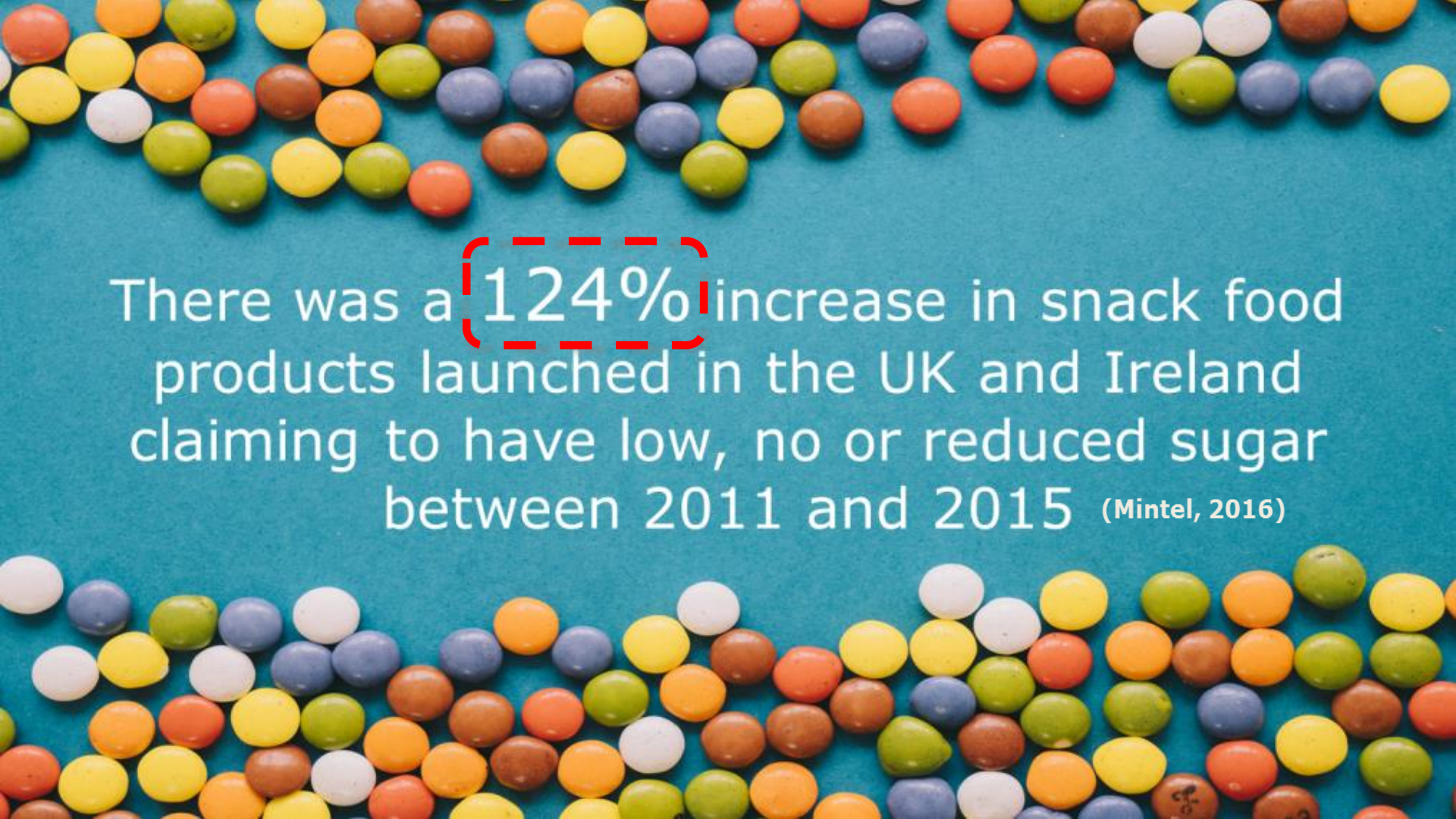
Which of these are typically important to you when it comes to choosing snacks?

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 %

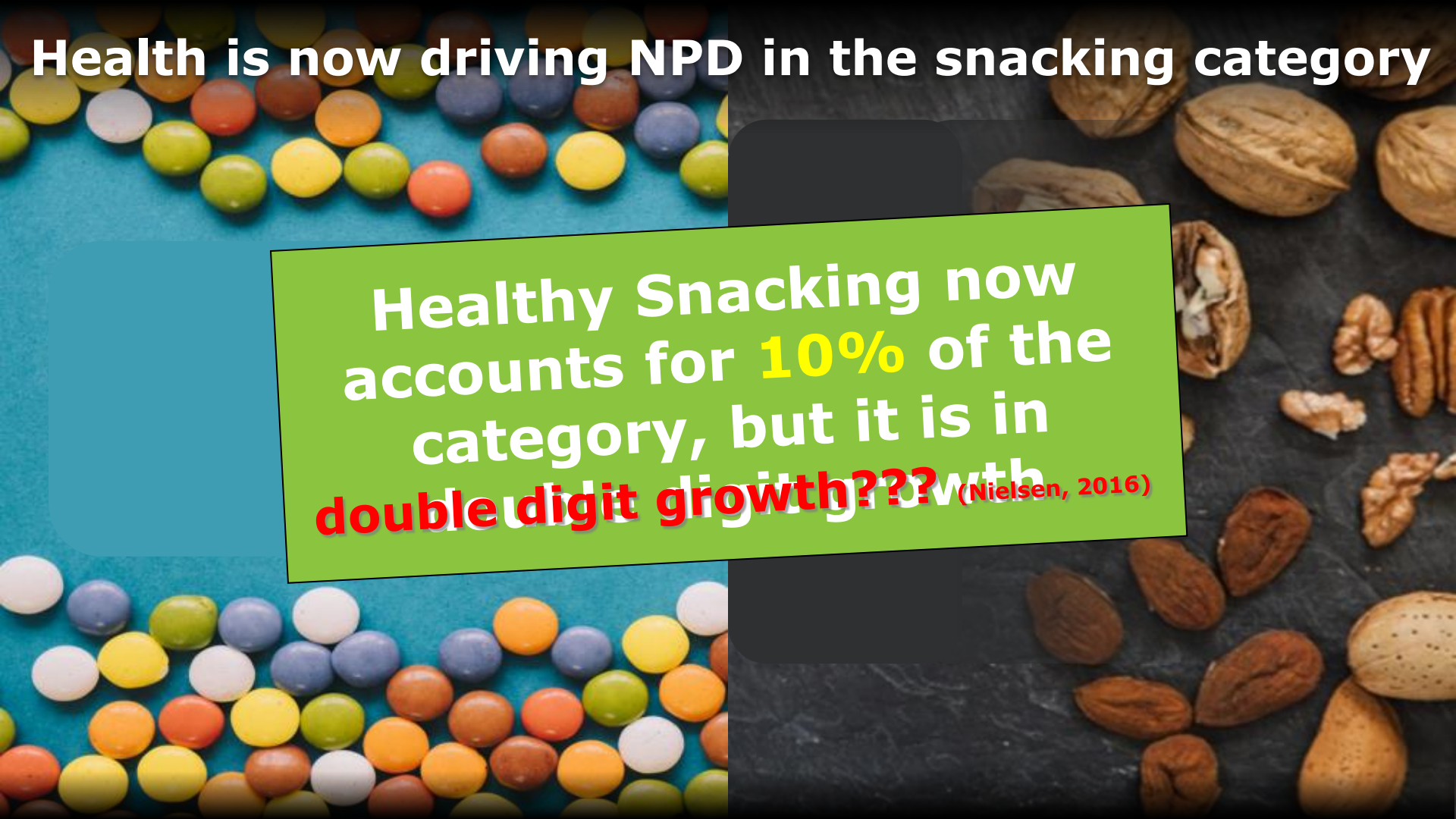


These statements highlight indulgence, survival and fuelling as key reasons to snack


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)

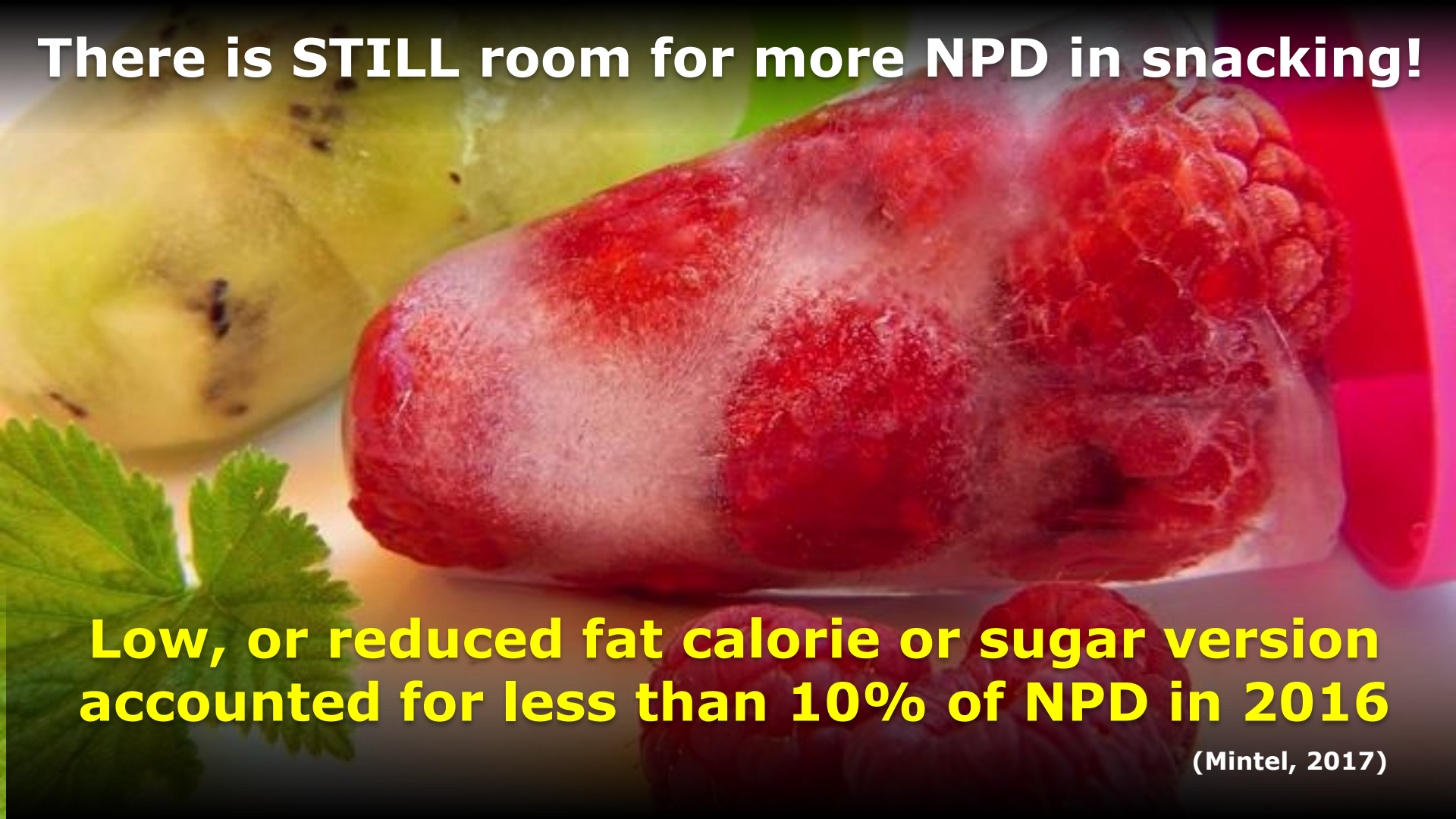
Health is now driving NPD in the snacking category



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

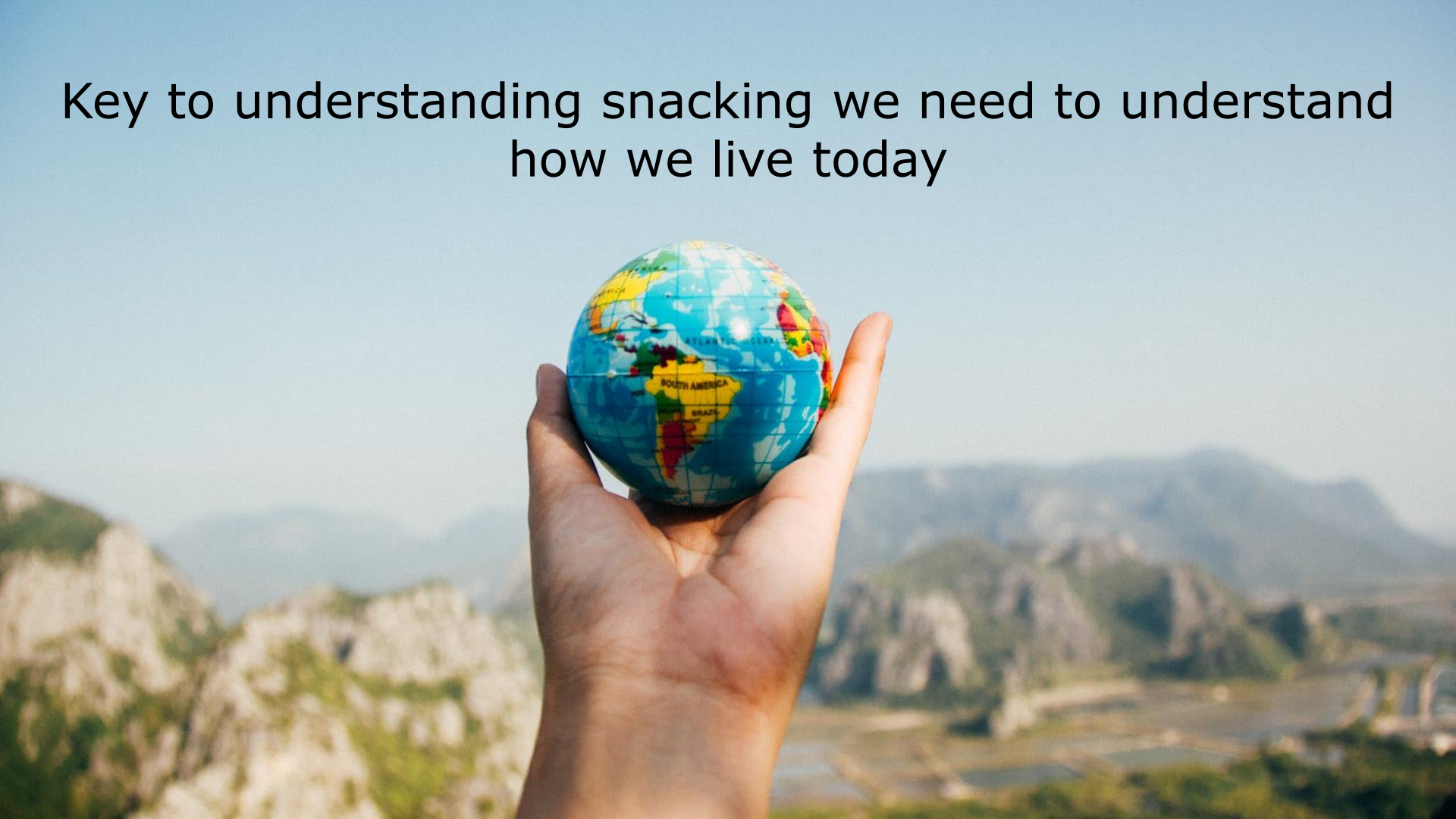
(Mintel, 2017)


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 way it is



Needs final sodas

Tream image

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

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



The conscientious citizen

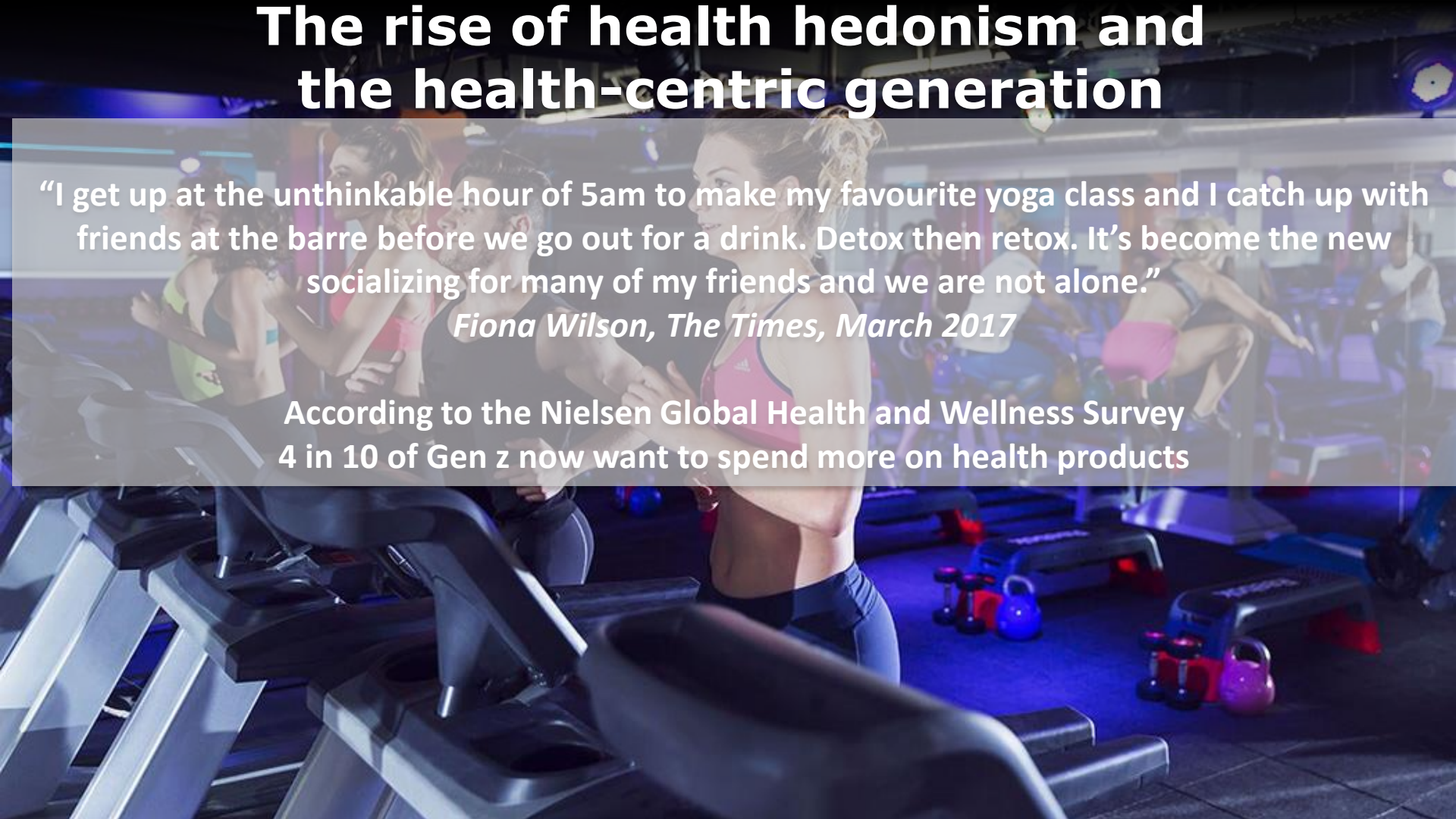


Centennnials and Millennials are more aware and conscientious often embracing the environment and more natural food offerings.

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



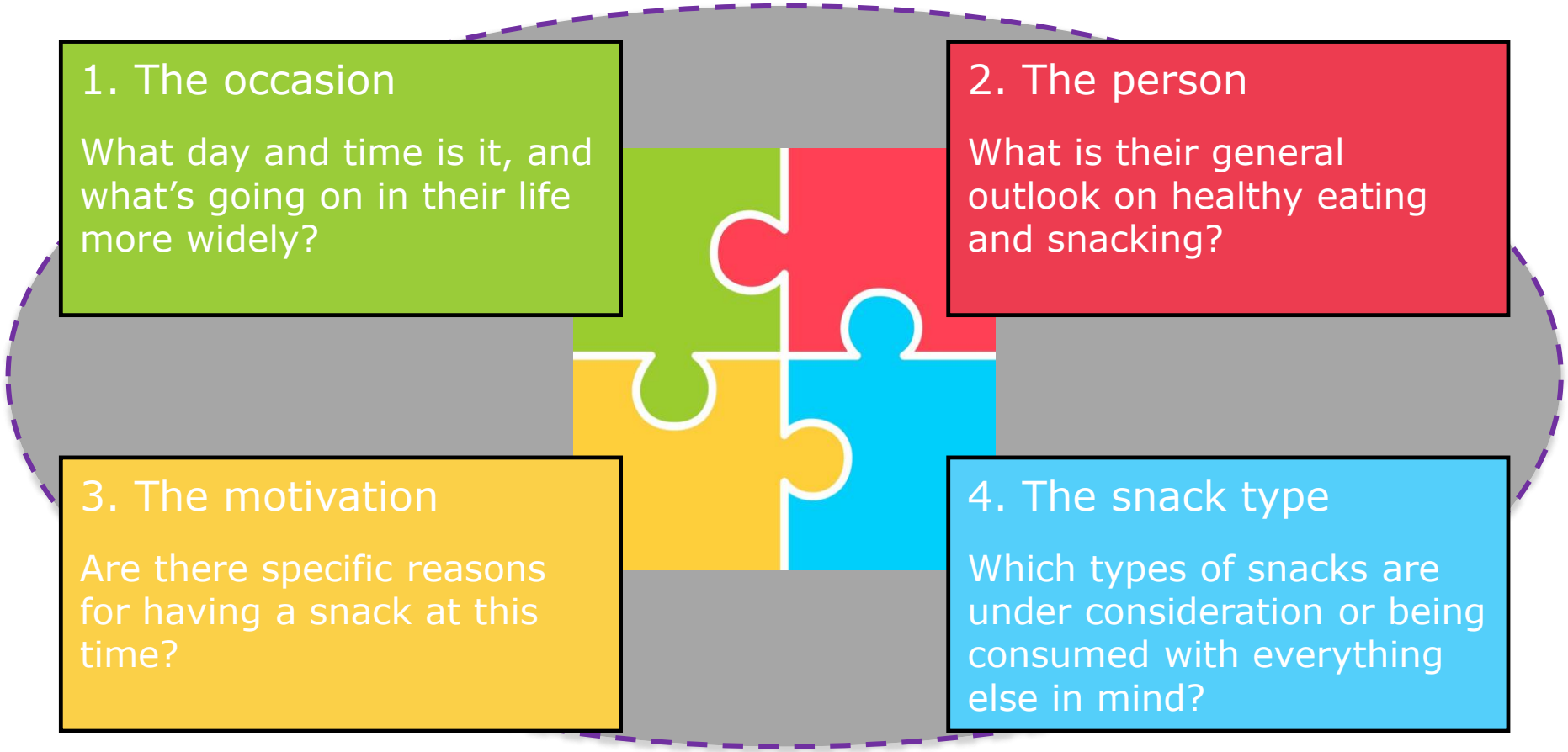
The Bord Bia Consumer Lifestyle Programme highlights how our busy lives just get busier. With that has come a demand for on the go food but food that is better for us is now more the norm- to give us the right energy.

Mutlitasking 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.

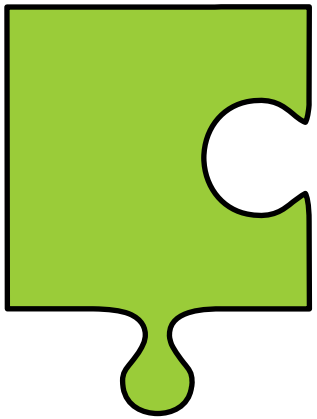


3. Snackers today, their repertoire, occasions and relationships with snacking

We have created four interlocking factors when looking at snacking



1. The occasion





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



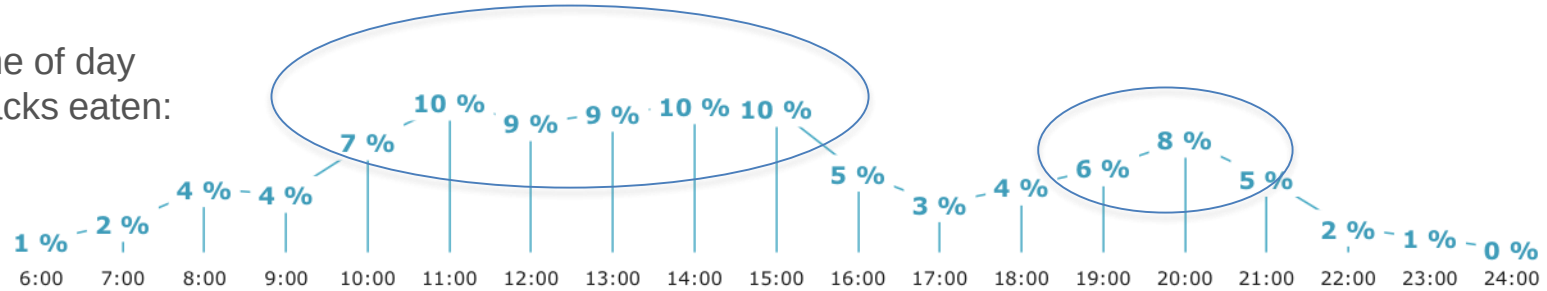


Planned snacks tend to be healthier while impulse snacking makes it harder to manage temptation

Base: UK Nat Rep n=1000, IRL Nat Rep n=1004

3 in 5 snacks are eaten between mid-morning and afternoon

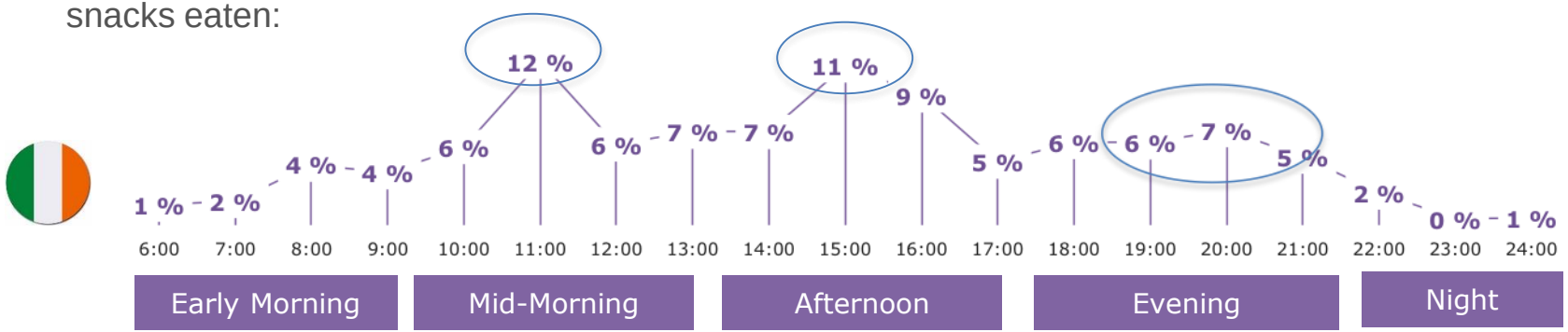
Time of day snacks eaten:



Base: UK Nat Rep n=1000

Classic 11am and 3pm snacks are very prominent in Ireland

Time of day snacks eaten:



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



Person

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%)

Snack

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:

- Fresh Fruit & Veg /pots — 55%
- Yoghurt/ Dairy Drinks — 44%
- Smoothies/ Juices — 29%
- Granola / Flapjacks — 25%
- Rice/Corn Cakes — 20%
- 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



Person

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

Snack

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:

- Fresh Fruit & Veg /pots — 57%
- Nuts, seed and trail — 36%
- 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



Person

Who is most likely to be snacking on this occasion?

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

Snack

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



Motivation

More about this

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

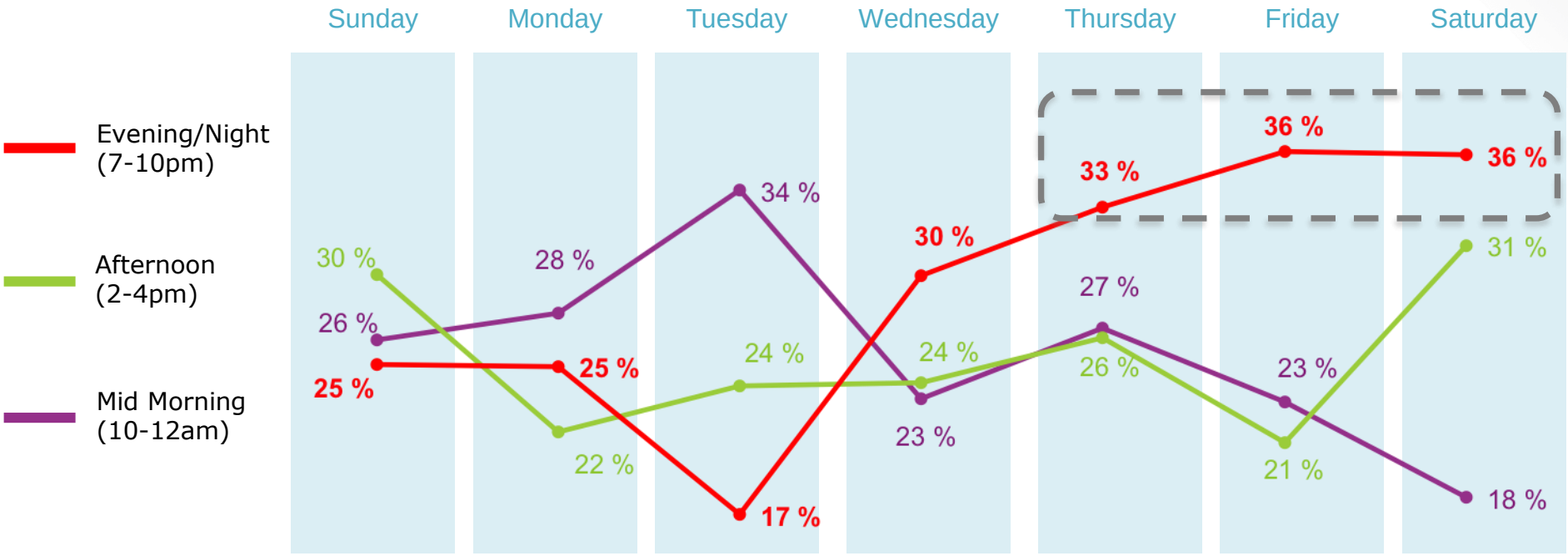
Less about this

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



Base: UK Snackers Aged 18-54: n=1000



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.

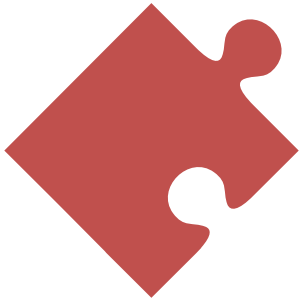
2. The person



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



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

Base: UK nat rep n=2,000; Irl nat rep n=1,004

Most consumers are trying to eat healthier

Disciplined	8%
Trying hard	36%
Good intentions	34%



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

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

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

Disciplined	8%
Trying hard	36%
Good intentions	34%

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

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

Summary of all snack categories eaten past week

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

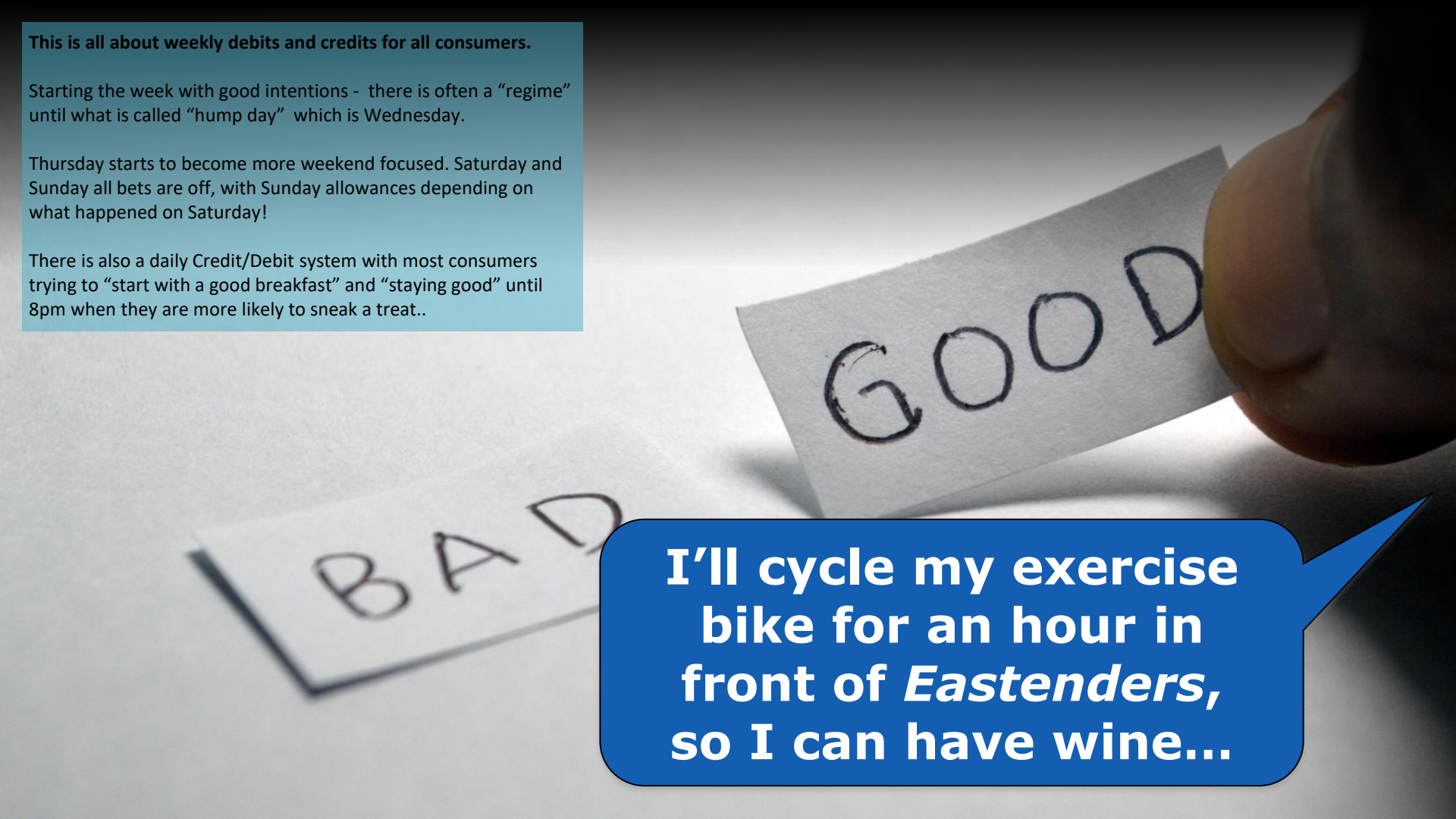
Base: UK snackers aged 18-54 n=1,000

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.

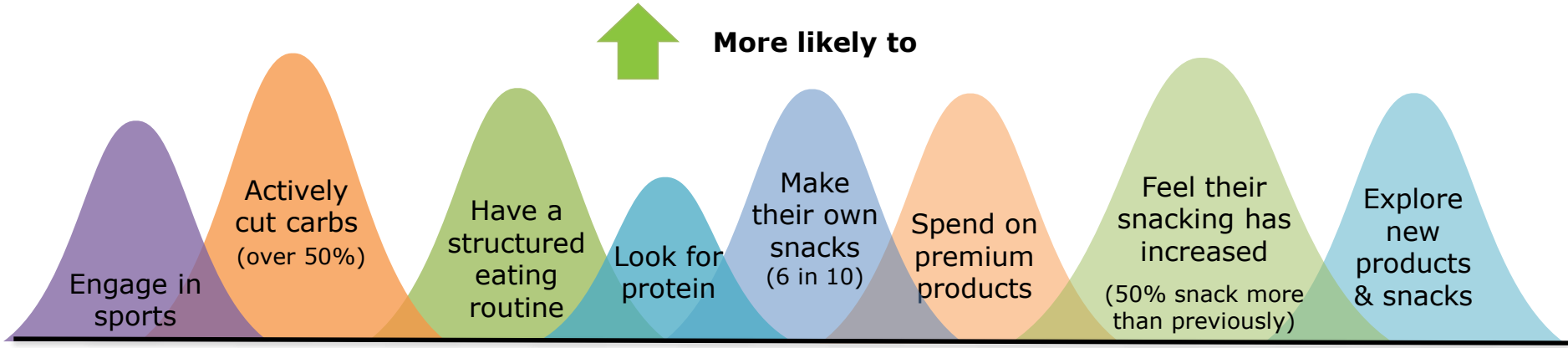
Thursday starts to become more weekend focused. Saturday and Sunday all bets are off, with Sunday allowances depending on what happened on Saturday!

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..



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.

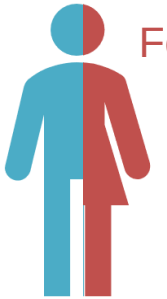
Base: UK snackers aged 18-54 n=1,000

Group 1 – Disciplined (8%)

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

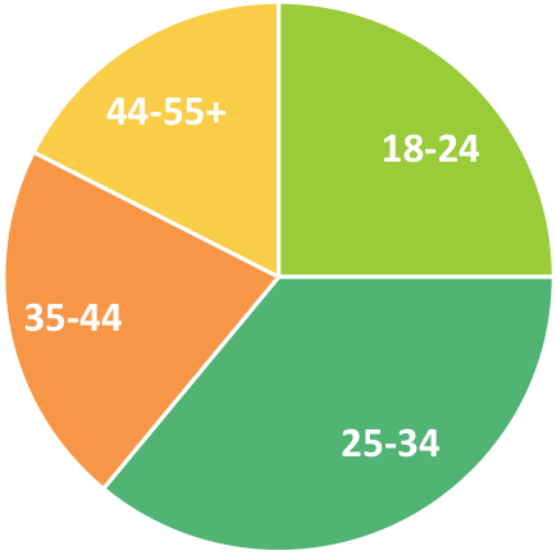
61% Male

39% Female



70% ABC1

Age Groups



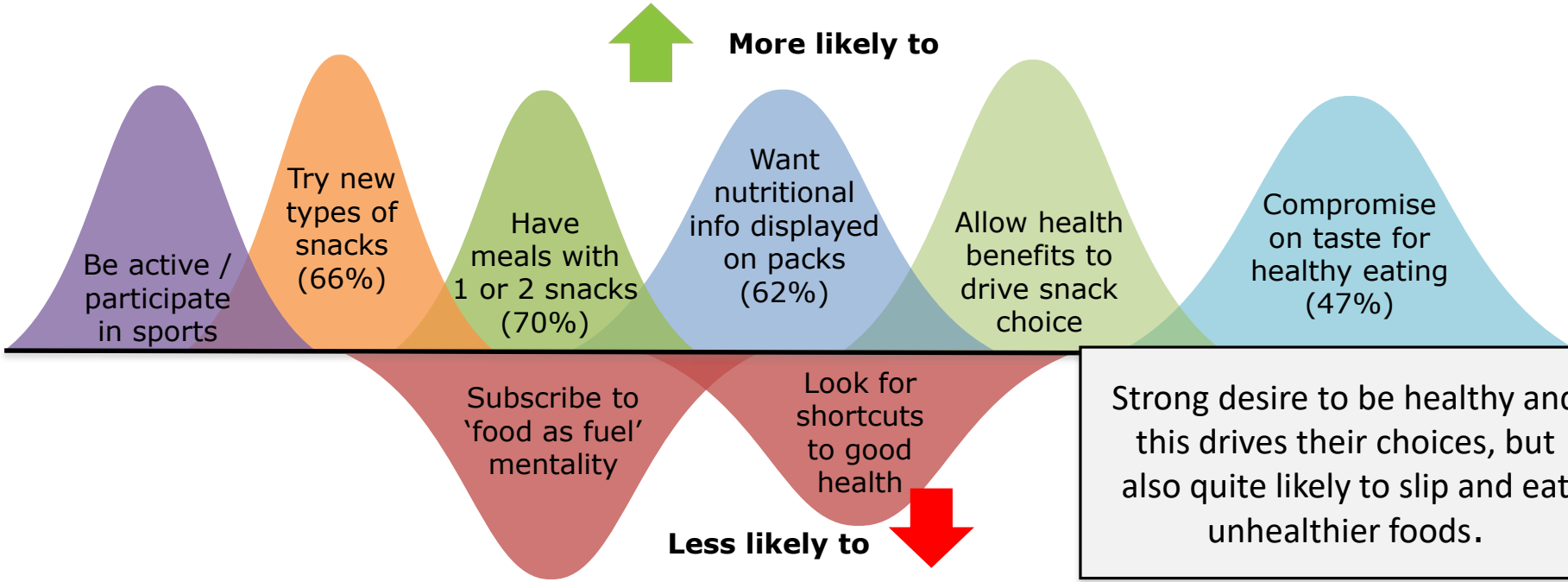
Top 5 snack types eaten in the past week

Fresh fruit & veg and veg snacks / veg pots	**51%**
Yoghurt / dairy drinks	**44%**
Biscuits / buns / pastries & cakes	**42%**
Chocolate / sweets and treats	**38%**
Nuts, seeds and trail mixes	**37%**

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'



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

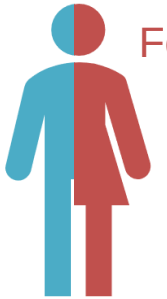
Base: UK snackers aged 18-54 n=1,000

Group 2 – Trying Hard (36%)

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

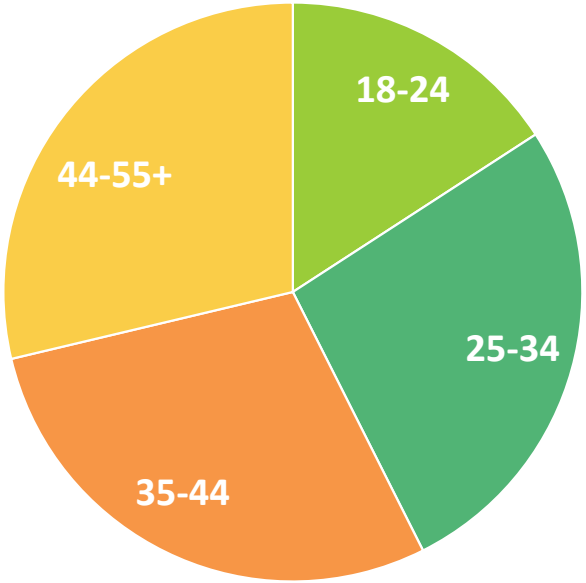
51% Male

49% Female



65% ABC1

Age Groups



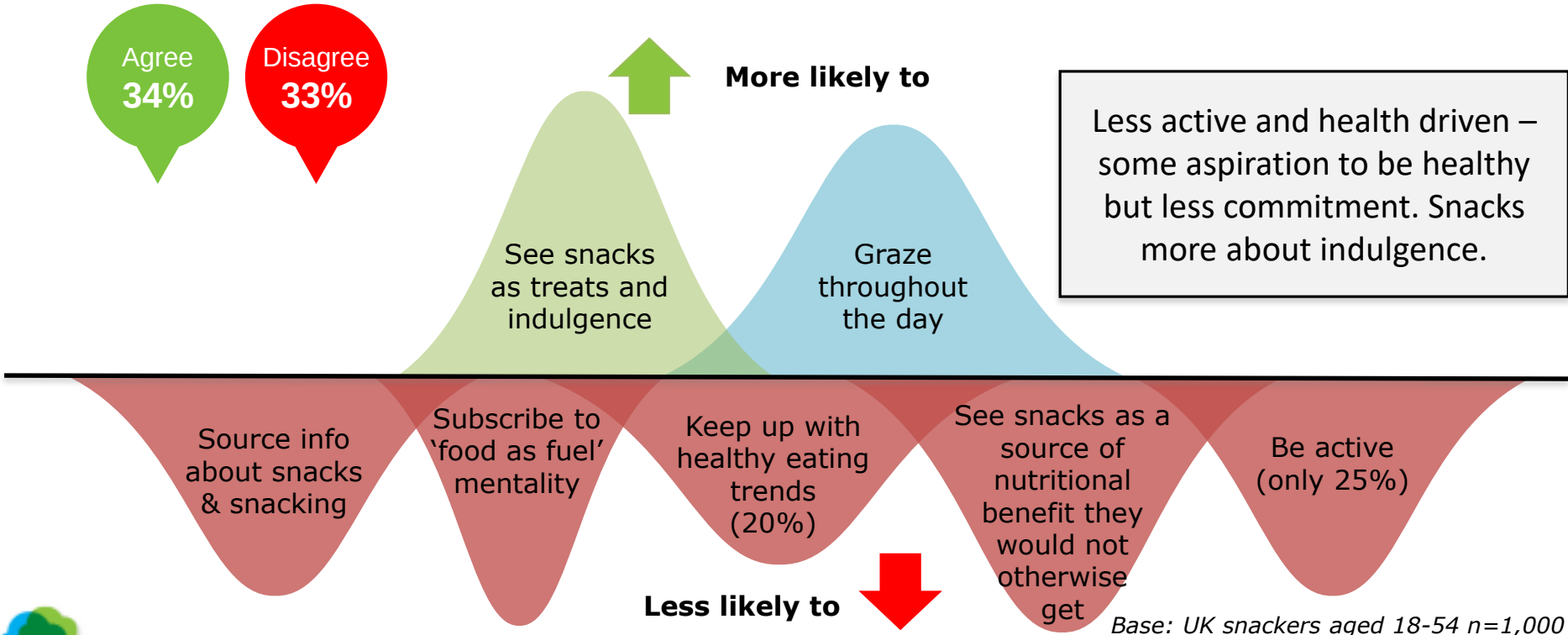
Top 5 snack types eaten in the past week

Crisps / Popcorn / Potato and corn snacks	63%
Chocolate / sweets and treats	62%
Fresh fruit & veg and veg snacks / veg pots	57%
Biscuits / buns / pastries & cakes	55%
Yoghurt / dairy drinks	42%

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'



Less active and health driven – some aspiration to be healthy but less commitment. Snacks more about indulgence.

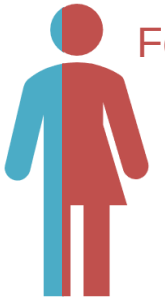
Base: UK snackers aged 18-54 n=1,000

Group 3 – Good Intentions (34%)

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

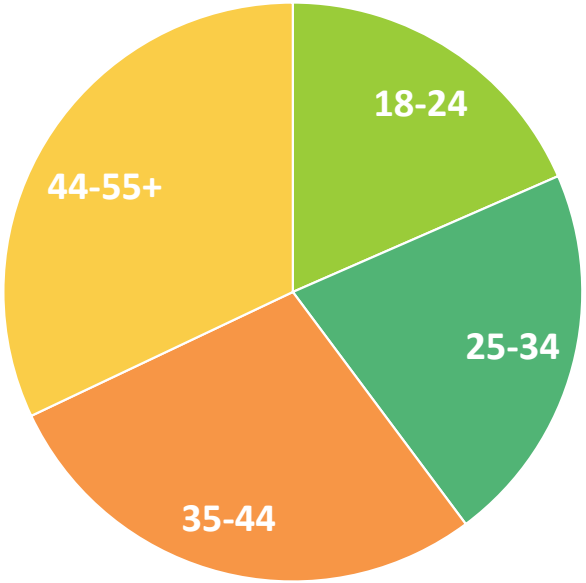
44% Male

56% Female



57% ABC1

Age Groups



Top 5 snack types eaten in the past week

Chocolate / sweets and treats	74%
Crisps / Popcorn / Potato and corn snacks	70%
Biscuits / buns / pastries & cakes	63%
Fresh fruit & veg and veg snacks / veg pots	42%
Yoghurt / dairy drinks	35%

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

Feeling better about myself

ENHANCING

SURVIVING

Basic Needs

EXPLORING

Finding new snack inspirations to try

FUELLING

Overlap – nutrition and sustenance

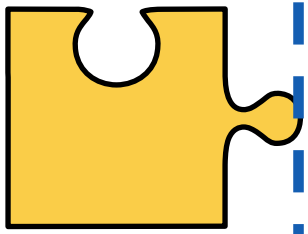
INDULGENT

#Lovefood
The enjoyment and reward factor of snacking

The choice architecture for snacking:

A reminder of the motivations relating to snack choice

The motivation

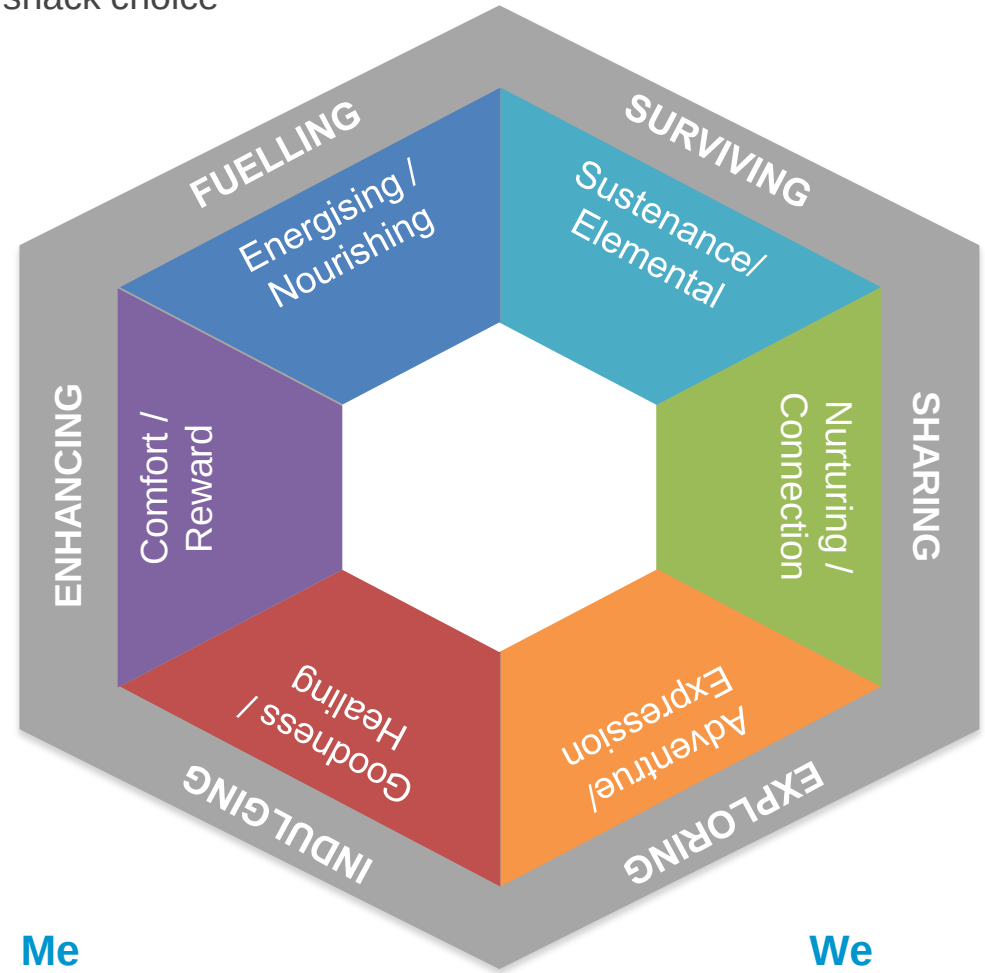


Rational

Emotional

Me

We



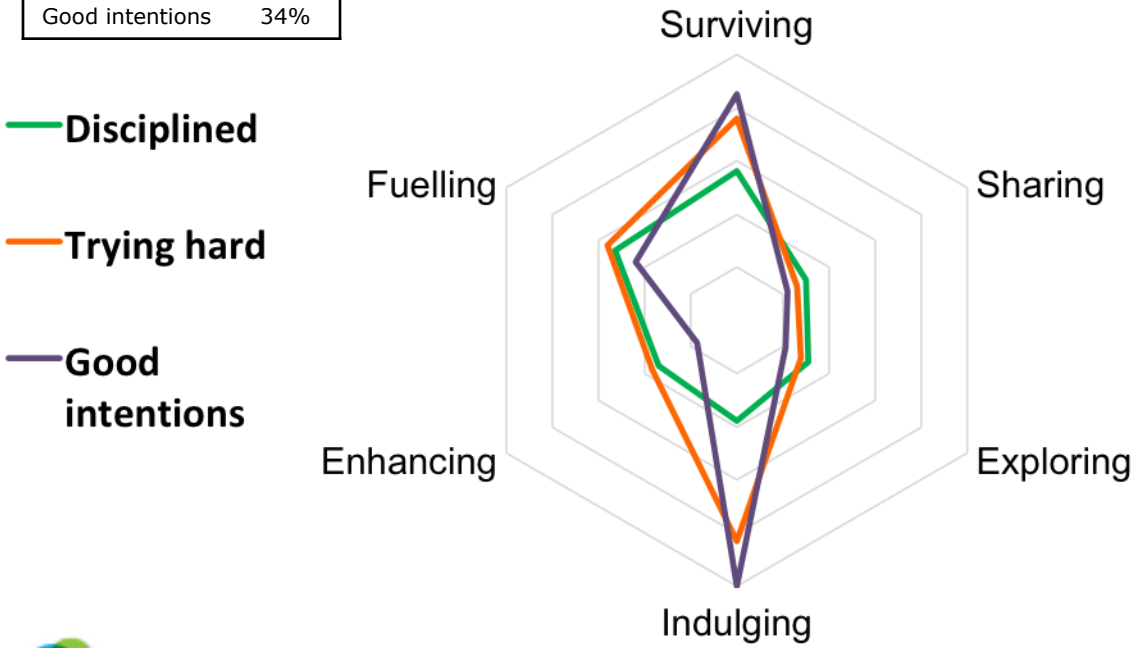
In general, indulgence followed by surviving are the primary motivations for snacking.

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%



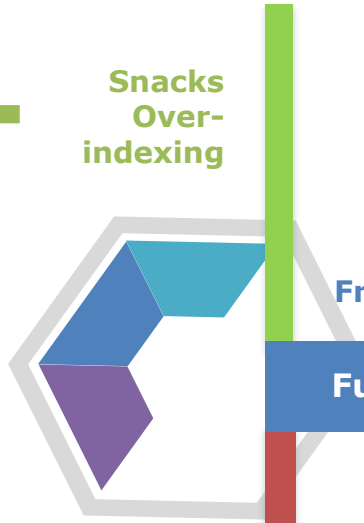
The **disciplined** group have the most balanced set of motivations – not as strong on surviving and indulging, but a more rounded set of factors.

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

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

Different snack groups relating to different motivations



Snacks Over-indexing

Snacks Under-indexing

Fuelling 31%

- Protein Bars/Balls 49%
- Smoothies/ Juices 48%
- Fruit & Veg 44%
- Meat snacks 19%
- Crisps/Popcorn13 %
- Choc/treats 12%

Surviving 42%

- Granola/Flapjacks 58%
- Crisps/Popcorn 51%
- Chocolate/sweets / treats 22%

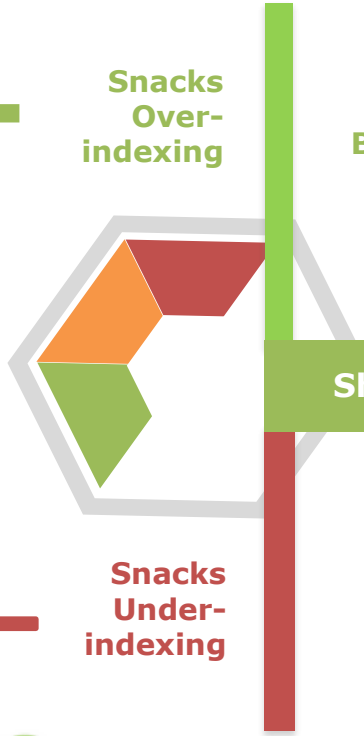
Enhancing 31%

- 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



Snacks Over-indexing

Snacks Under-indexing

Sharing 12%

Protein Bars/Balls 19%

Rice/Corn Cakes 19%

Exploring 8%

Protein Bars/Balls 21%

Meat snacks 19%

Indulging 40%

Choc/sweets & treats 77%

Crisps/Popcorn/ Corn Snack 59%

Rice/corn cakes 19%

Protein Bars/ Balls 21%

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)

Overindex

Underindex

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

UK Snacks n=1913

Snack types and needstates to which they most relate (2)

Overindex
Underindex

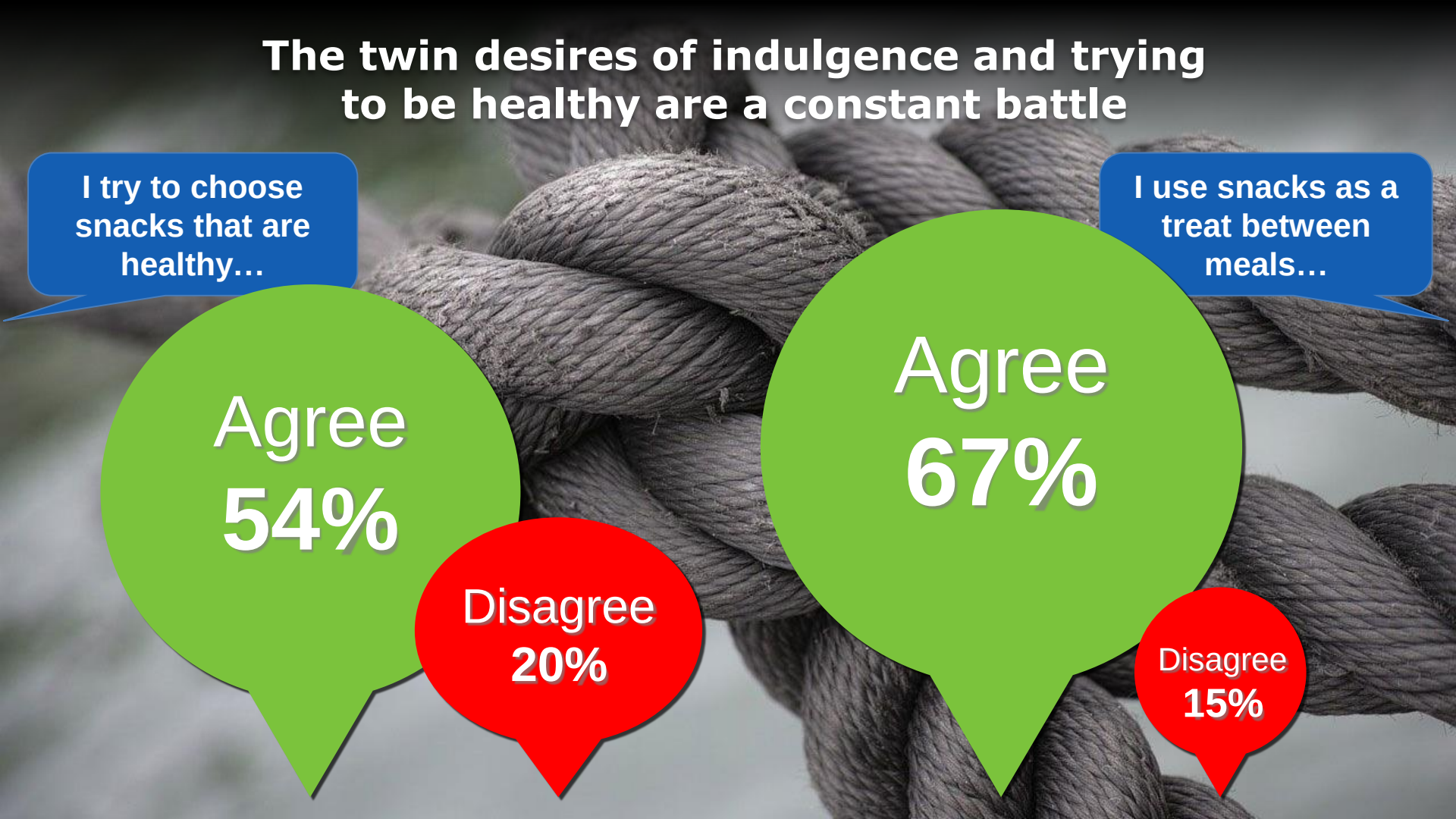
	Try something new	Make me look well to others	Nurture or provide for others	Enjoy and share along with others	To comfort me and make me feel good	A treat; pure enjoyment	For health benefits	Guilt-free option – made me feel good	Basic nutrition my body needs	Energy boost to keep me going	To fill me up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

4. The snack type

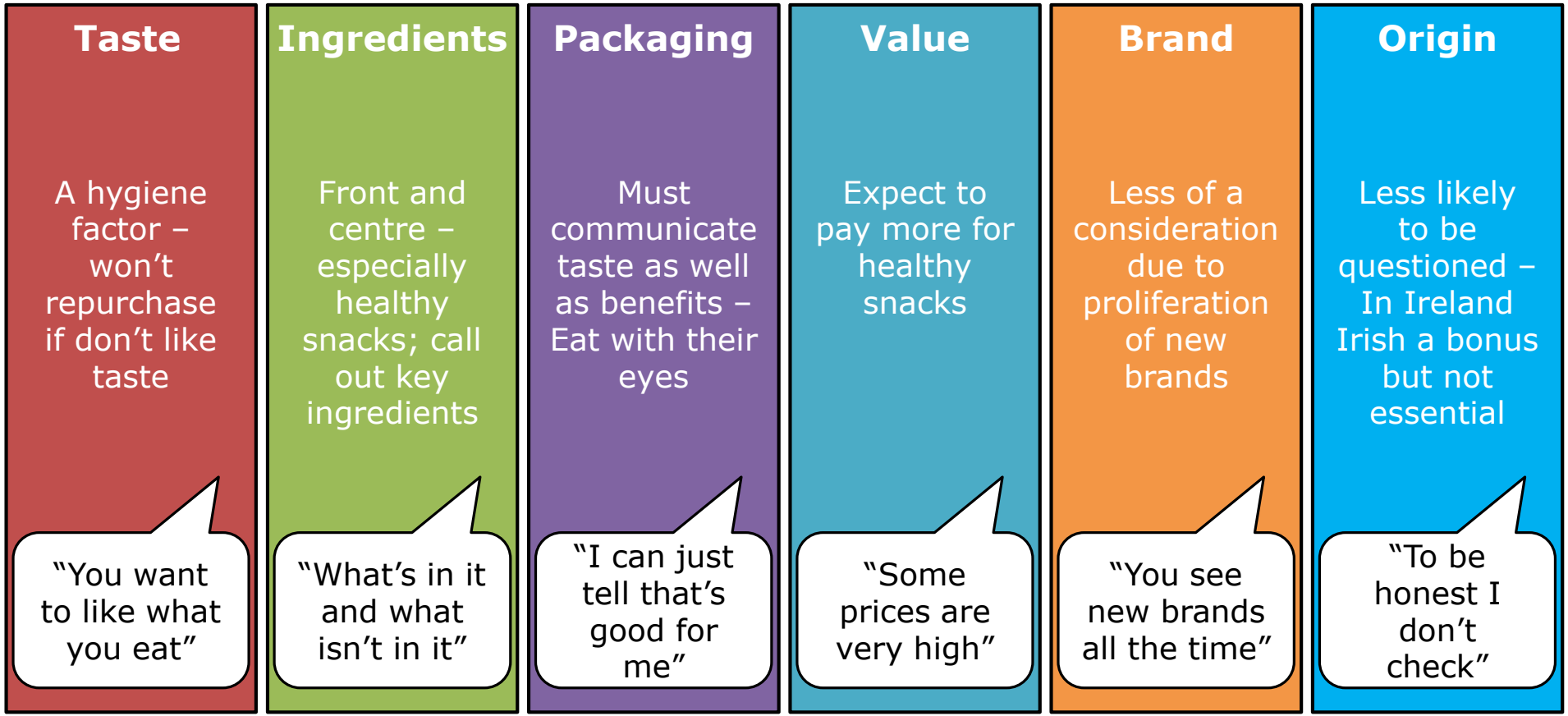
Which types of snacks are under consideration or being consumed, with everything else in mind?



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%

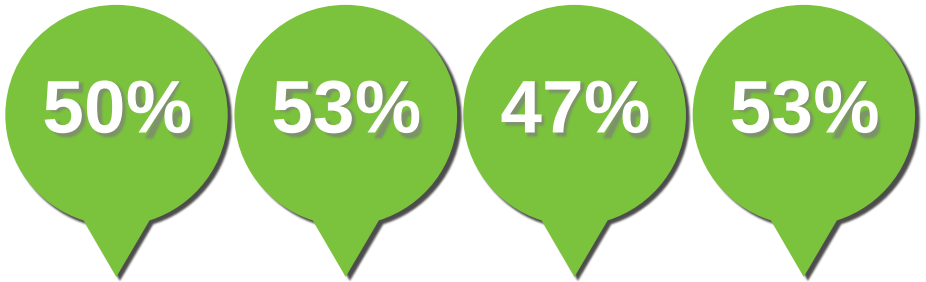
Key drivers of product choice: the spectrum view



Taste is king

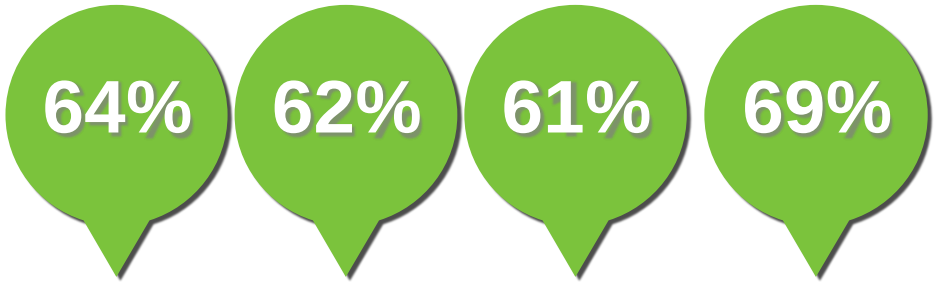
I'd like to buy healthy snacks but they tend to be too expensive for me

% agree



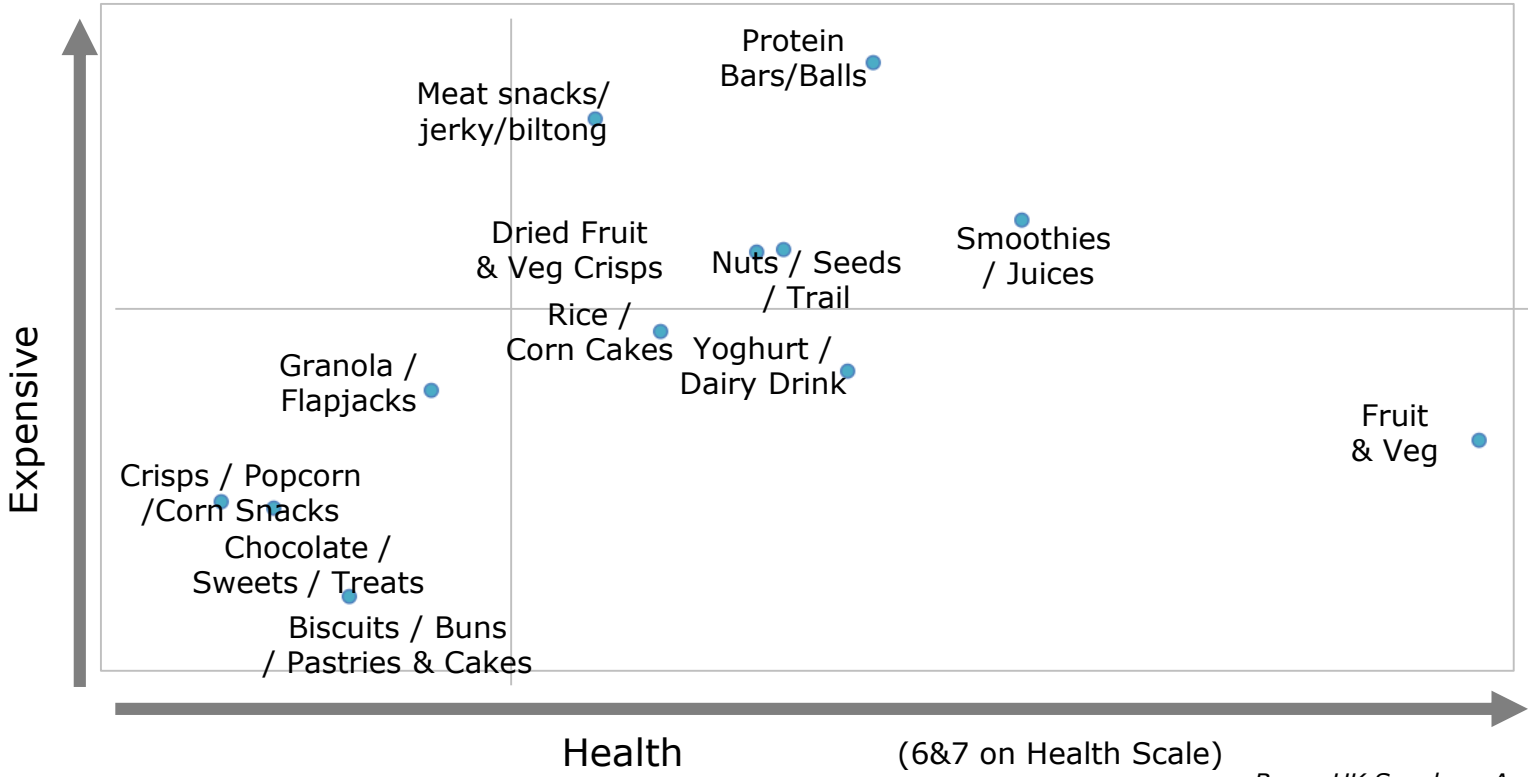
I would eat healthier snack foods if they tasted better

% agree



Base: UK Snackers Aged 18-54: n=1000

In looking at health versus expense some of the healthiest snacks are acutally 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



Base: UK Snackers Aged 18-54: n=1000

Indulgence with a healthy halo

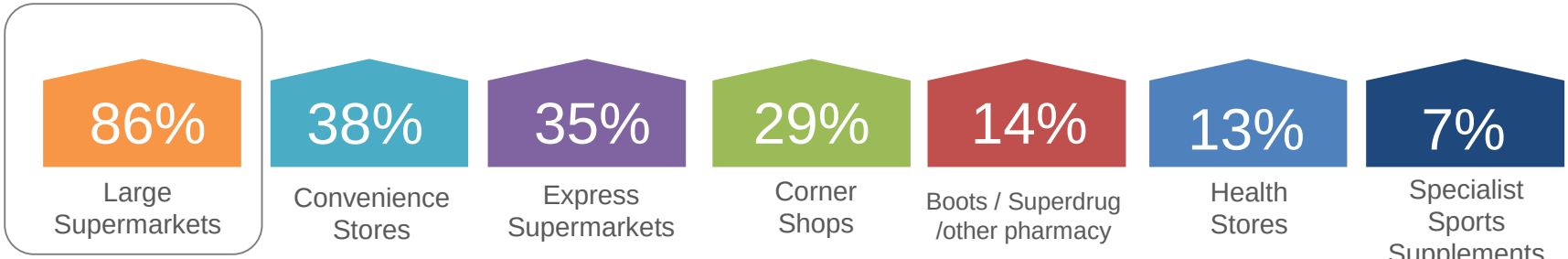
- The *Fulfil* effect is evidence of the success of building a product that serve both the *Indulgent* and *Surviving* motivations – tasty first and healthy second
- Applying the traditional rules of confectionery to a healthy snack has worked well





4. Purchasing habits and behaviours

Where are people purchasing snacks?



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

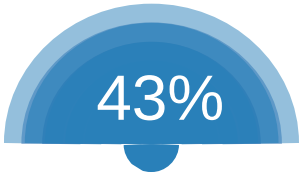
- Buying for snacks at work & on the go
- Mostly full time workers
- Their shopping has increased a lot (10%)
- Over indexing for impulse buying snacks

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



It was something I had entirely on impulse

Who are they?

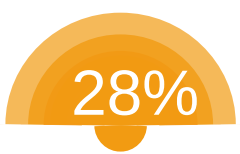
- Snacking at home (66%)
  Less health conscious, have good intentions (46%)
- Over indexing on the unhealthy snacks: Crisps/Popcorn/Corn Snacks, Choc/ Sweets & Treats
- Mostly snacking at the weekend (39%)



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%



I had planned in advance to have this snack

Who are they?

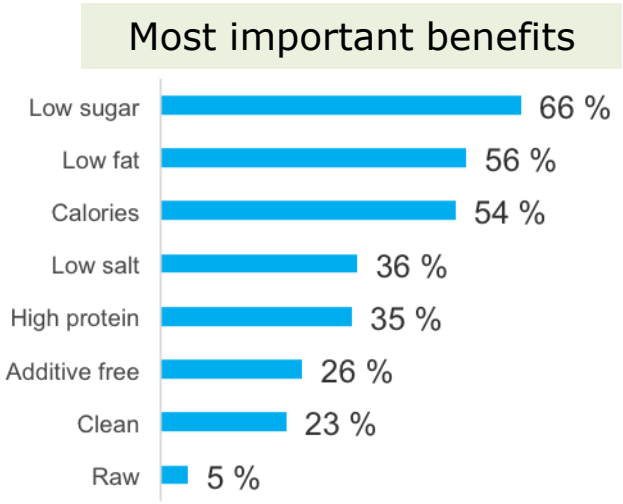
- Over-indexing for regularly working out & managing their food
  63% buy in advance or prepare snacks at home
- Snacking more on:
  Smoothies / Juices
  Yoghurt / Dairy Drinks
  Fresh Fruit & Veg Snacks/Pots

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?





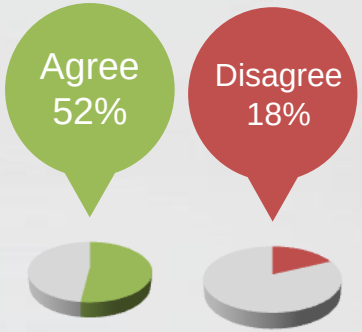
Note – for the disciplined group, the presence of protein becomes much more important and is equal top with low sugar

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”





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

movingdietitian
Melbourne, Victoria, ...
Follow

movingdietitian HEALTH FOOD AISLE FAIL

One of many examples of bars found in the health food section that are not so healthy. They contain
✖ Similar calories to a mars
✖ 5tsp worth of sugar!! Not as high as a mars at 9tsp but should be minimised all the same

One of many examples of bars found in the health food section that are not so healthy. They contain
✖ Similar calories to a mars
✖ 5tsp worth of sugar!! Not as high as a mars at 9tsp but should be minimised all the same
• If it's protein you're after, you can eat 2 eggs instead 👍

223 likes
2 DAYS AGO

("Paula Norris, Dietitian AU (@movingdietitian) • Instagram photos and videos", 2017)

1 in 2 people want snacks they can split into portions

Portion control

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



"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

The Thinking House

BORD BIA INSIGHT CENTRE

Future Focus
Snacking Trends

What the future holds: the rise of the super indulgent snack

indulgence

/ɪnˈdʌldʒ(ə)ns/

noun

1. the action or fact of indulging.
   "indulgence in self-pity"
   synonyms: satisfaction, satisfying, gratification, gratifying, fulfilment, fulfilling, satiation, appeasement, assuagement, quenching, slaking; More

2. *historical*
   (in the Roman Catholic Church) a grant by the Pope of remission of the temporal punishment in purgatory still due for sins after absolution. The unrestricted sale of indulgences by pardoners was a widespread abuse during the later Middle Ages.

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

sustainability

/səsteɪnəˈbɪlɪti/

noun

the ability to be maintained at a certain rate or level.
"the sustainability of economic growth"

- avoidance of the depletion of natural resources in order to maintain an ecological balance.
"the pursuit of global environmental sustainability"

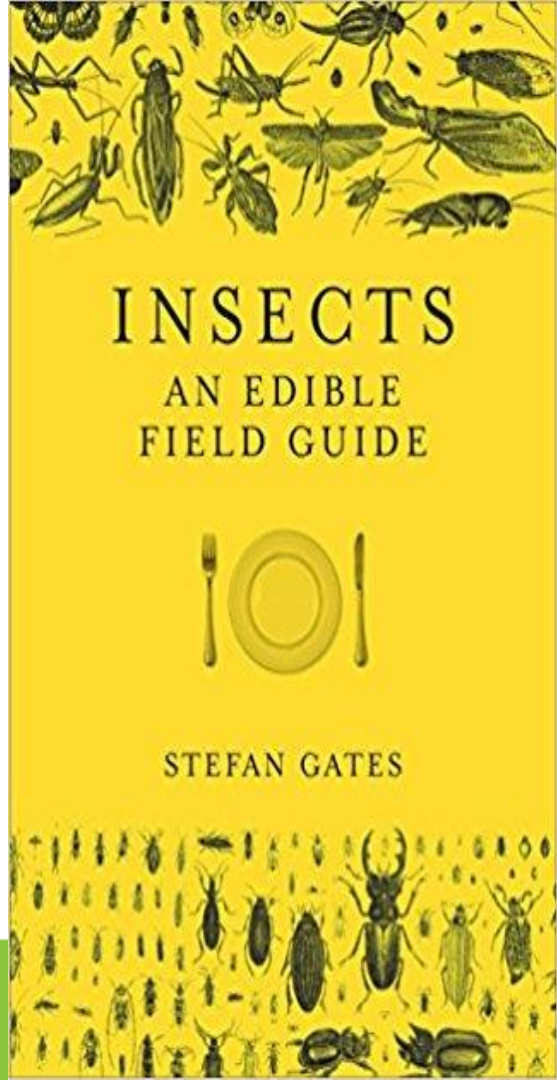
Increased awareness and concern for the environment on a range of levels is going to create demand for more and more products that subscribe to a sustainable ethos covering packaging, manufacturing and ingredients used

Insects snacks address not only sustainability but being high in protein they actually address a number of health needs



Nagano Hachinoko
Candied Bee Larvae





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)





What the future holds: new channels

delivery
/dɪˈlɪv(ə)ri/

noun

1. the action of delivering letters, parcels, or goods.
   "allow up to 28 days for delivery"
   synonyms: conveyance, carriage, transportation, transporting, transport, distribution; More
2. the process of giving birth.
   "injuries sustained during delivery"
   synonyms: birth, childbirth; More

New channels provide opportunities for brands to differentiate themselves and to work with busy lives

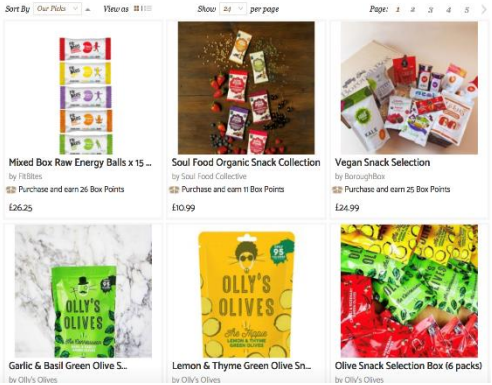
graze



BoroughBox™

HEALTHY SNACK SHOP

The BoroughBox Healthy Snack shop features everything the healthy foodie needs for some snacking. You'll find expertly curated Healthy snacks and the best hand-made Healthy Snacks and healthy snack gift ideas. Healthy snacks for every lifestyle. Paleo snacks and Paleo snack ideas, vegan snacks and healthy food snacks. Who says eating healthy snacks needs to be dull? The amazing Healthy snacks at BoroughBox has some incredible foodie snack ideas that are nutritious snacks, low fat snacks, high protein snacks and most of all...
Read more



naturebox Our Snacks About Our Snacks NatureBox for



Making healthy food convenient

The Thinking House

Bord Bia
Irish Food Board



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!

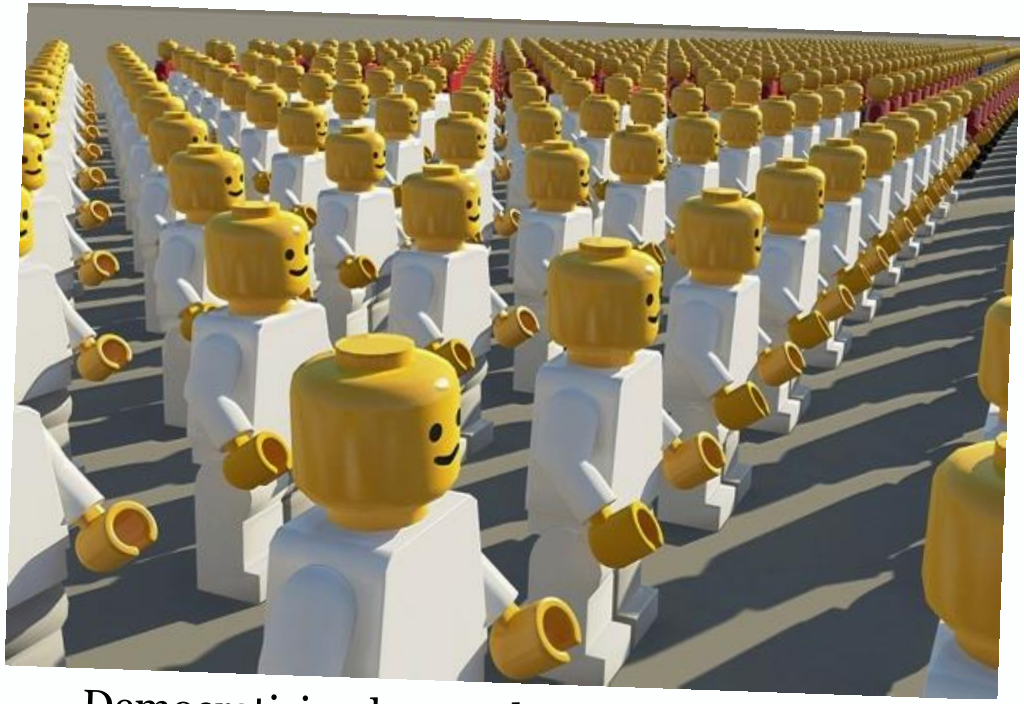
Recognizing that taste is king!

Opportunity

#2

Introducing them to the new world

RESOLUTION



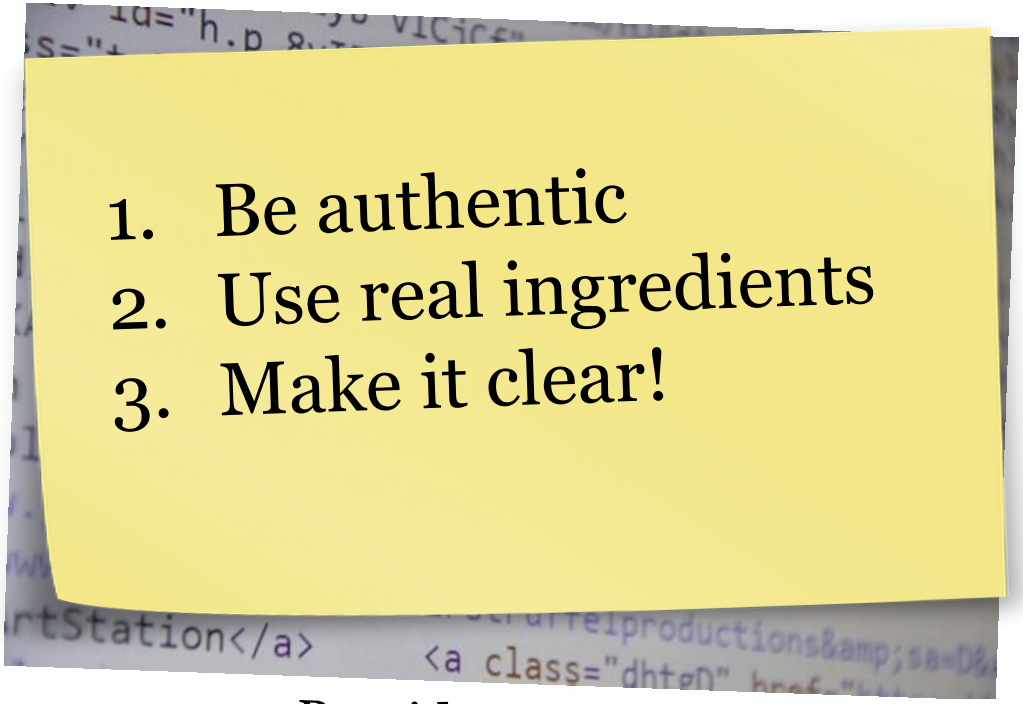
Democratizing better choices: making healthy options more accessible to a wider audience

Opportunity

#3

Supporting the cynical and confused!

RESOLUTION



Provide the cues…

Opportunity

#4

Facilitate identity badging



Opportunity

#5

Tick-tock with the body clock

RESOLUTION



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

Opportunity

#6

Grant permissible indulgences



Opportunity

#7

Find the perfect partners

RESOLUTION



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

Opportunity

#8

Chunk it down!

RESOLUTION



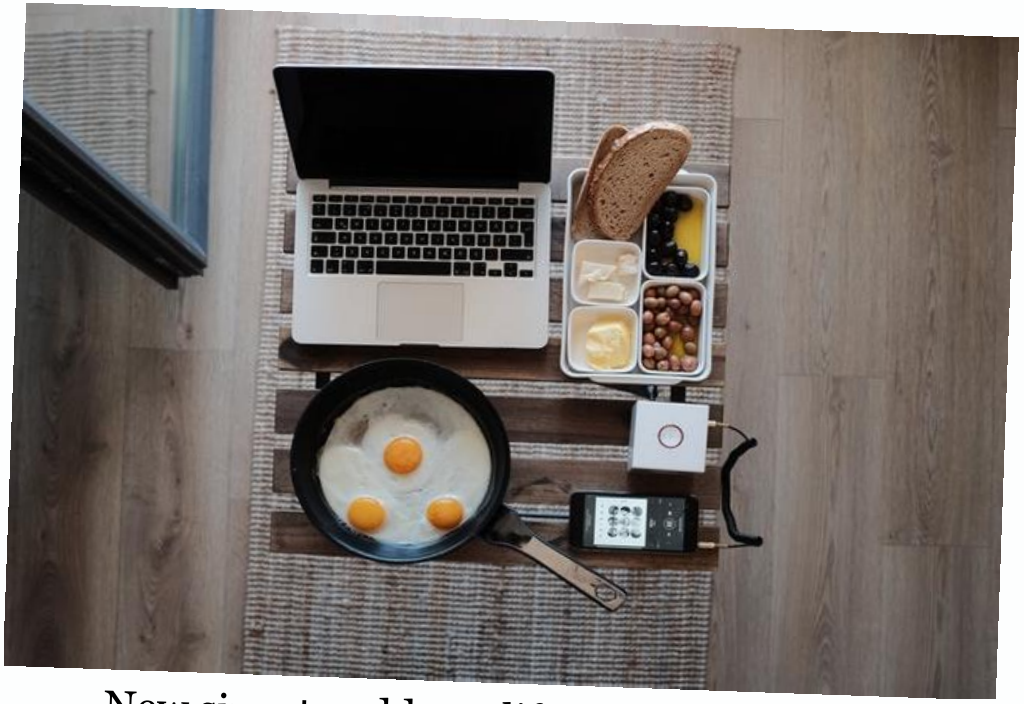
New sizes: smaller snacks to facilitate self control

Opportunity

#9

Chunk it up!

RESOLUTION



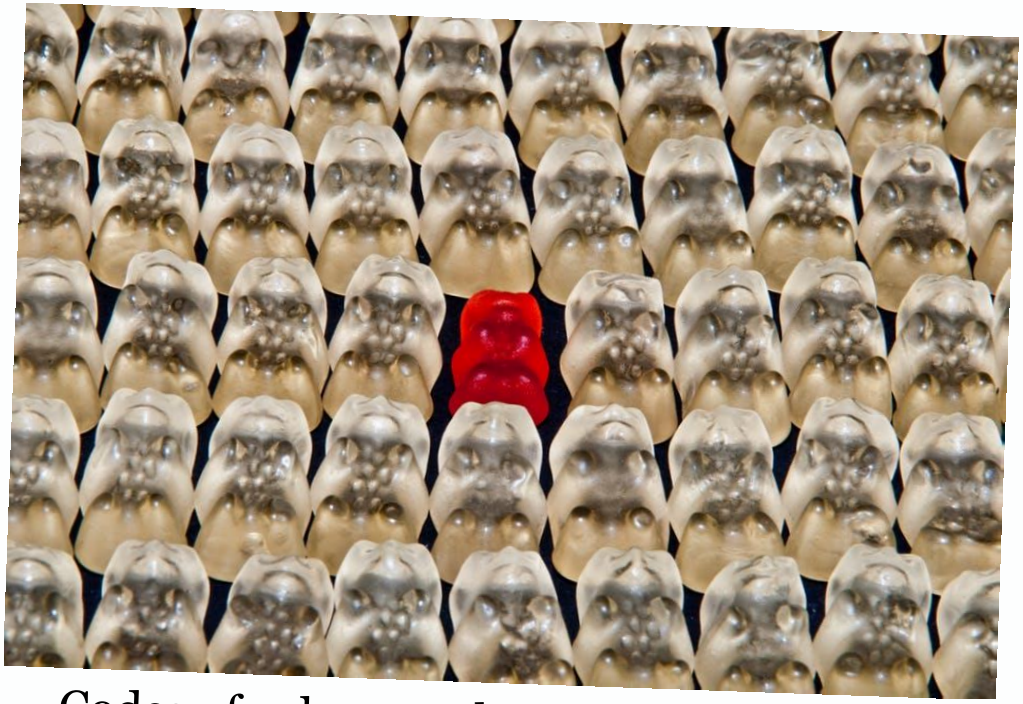
New sizes to address life on the move. Meal snacks on the move!

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.

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See reference above

With thanks to visual sources:









