

Consumer Snacking - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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“Signalling a warning to the snacks market, cutting back on snacks is seen widely by people as an easy way to reduce their calorie intake and to feel as though they are taking action on health. However, there is demand for products that help consumers with portion control, thus offering permissibility and helping them to pace themselves when snacking. This is key to keeping consumers in the market.”

– **Amy Price, Senior Food and Drink Analyst**

This report looks at the following areas:

- **Smaller formats offer portion control and permissibility to allow snackers to stay in the market**
- **Portability would aid snackers across multiple locations**
- **Targeting 'day-parts' such as morning or evening provide an opportunity to manufacturers**

This Report looks at consumers' snacking habits, defined as eating between meals, for example fruit, biscuits or crisps, among others. The Report will look at snacking at home, elsewhere (eg at work) and on-the-go (eg when travelling), consumers' snack choices and attitudes towards snacks.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Portability would aid snackers across multiple locations

The facts

The implications

Targeting 'day-parts' such as morning or evening provide an opportunity to manufacturers

The facts

The implications

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The Market – What You Need to Know

Health remains an issue
 Consumer caution – and price rises – could hit discretionary spending
 Cakes lead NPD
 Health-led NPD
 Adspend up in 2016; with Mars in the lead
 Trust and differentiation is high for snacking brands

Market Drivers

Health remains an issue
 Obesity keeps healthy eating on government agenda
 Sugar is a top concern...
 ...but there is room for indulgence
 Consumer caution – and price rises – could hit discretionary spending
 Household budgets to come under pressure
 Rising snack prices
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 Demographic changes could impact the market
 Younger people are the core snackers
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 ...chocolate
 ...biscuits
 ...and cakes

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Healthier snacks for sharing

Tapping into seasonal occasions

Smaller packs/pieces offer portion control

Biscuits and cakes

Cheese snacks look to minis and bars

The "thins" trend continues in snacking

Health-led NPD

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Sugar claims remain low, despite rise

Yogurt brands continue to focus on fat and sugar

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In cakes and cake bars

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Mars looks to high protein in chocolate

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Snackification seen in other food categories

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Mars maintains support for Galaxy...

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Return of the Milk Tray Man and Snapchat for Crème Egg

Focus on baked and flavour for Ritz

Ferrero focuses on Christmas

Hotel Chocolat dramatically increases spend

Nestlé supports KitKat and Rowntree's

Haribo continues Kids' Voices campaign

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Walkers maintains consistent adspend, Hula Hoops to return to screens
 Walkers dominates adspend on crisps
 Doritos continues its 'For the Bold' campaign
 Hula Hoops to return to screens
 Yogurt advertisers increase spend
 Müller supports Corners and Light
 Danone centres on 'inner strength' for Activia
 Pladis increases spend in biscuits
 Campaigns through alternative channels
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 Danone teams up with Spotify
 KitKat brings Chocolatory pop-up to the UK
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The Consumer – What You Need to Know

93% snack

63% snack once a day or more, rising to 76% of 16-34s

79% snack at home

Opportunities for NPD that facilitates out of home occasions

Taste trumps health for 52%

Health is a priority in the morning; indulgence of an evening

Snack Usage

93% snack

Figure 21: Snacks eaten between meals, December 2016

Fresh fruit is the most popular snack

Less healthy options also prove popular

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49% eat five or more types of snacks

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63% snack once a day or more, rising to 76% of 16-34s

Figure 23: Frequency of eating snacks, December 2016

79% snack at home

Figure 24: Where people typically snack, December 2016

Out of home occasions are also common

47% of employees snack at work

18% snack on-the-go, rising to 30% of 16-24s

Behaviours Related to Snacking

Opportunities for NPD that facilitates out of home occasions

Resealability is in high demand

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57% cut back for health reasons

Smaller, luxurious versions appeal

Newness acts as a prompt, especially to 16-34s

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Taste trumps health for 52%

Figure 28: Attitudes towards snacking, December 2016

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Surprising acceptance of positive nutrition in indulgent snacks

Portion control offers permissibility

'Mini' packs appeal widely

Parents struggle to find snacks suitable for the whole household

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Energy and fullness also appeal

...while indulgence rises as a priority throughout the day

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Figure 30: Attributes sought for snacking occasions, December 2016

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Methodology

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