

Snacking Motivations and Attitudes - US - January 2019

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Snack frequency increasing
- Consumers say they want healthy snacks, but flavor remains important
- Expanding boundaries challenge snack brands, provide opportunity for all food/drink players

Snacks are planned, and are as likely sought to satisfy hunger as they are to satisfy cravings. Consumers want indulgence and health, sometimes at the same time, meaning brands that can provide a hint of both or ways to tap into both mood states can flourish.



"95% of US adults snack daily, and 70% do so 2+ times per day, making snacking a huge opportunity for connecting with consumers. The percentage of "super snackers" (those who snack 4+ times per day) is increasing, and the fact that busy lifestyles result in the skipping of meals (or replacing meals with snacks) suggests snack frequency will continue to grow in the near term."

Beth Bloom, Associate Director - Food & Drink

Buy this report now
Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Definition

EXECUTIVE SUMMARY

- The issues
- **Snack frequency increasing**
Figure 1: Snacking frequency, January 2015 and November 2018
- **Consumers say they want healthy snacks, but flavor remains important**
Figure 2: Snack attitudes -- Health, November 2018
- **Expanding boundaries challenge snack brands, provide opportunity for all food/drink players**
- The opportunities
- **Fun and function are on par for snackers**
Figure 3: Snack motivations, November 2018
- **Flavor rules snack choice, but value has a strong impact on purchase**
Figure 4: Snack purchase drivers, November 2018
- **All snack categories are experiencing sales growth**
Figure 5: Percentage growth in select snack categories, 2012-17
- What it means

THE MARKET – WHAT YOU NEED TO KNOW

- **Aging population shifts the call for age-specific snacks**
- **Wellness for the masses**
- **Americans are stressed, and stress eating**
- **Time is money, and there's not enough of it**

MARKET FACTORS

- **Aging population shifts the call for age-specific snacks**
Figure 6: Population by age, 2013-23
- **Consumers focused on wellness, seek guidance**
Figure 7: Current health goals, August 2018
- **Americans are stressed, and stress eating**
Figure 8: Health concerns, by age, November 2018
- **Time is money and there's not enough of it**
Figure 9: Snack motivations – Busy, by age, November 2018
- **Snacks across category see sales growth**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MARKET PERSPECTIVE

- All snack categories are experiencing sales growth, some stronger than others
- Salty snacks maintain momentum
- Dips and savory spreads continue steady growth
- Dollar sales of bars grow 20% from 2012-17; slower growth projected through 2022
- Slower sales, yet signs of recovery for nuts, seeds, and trail mix
- Modest, mostly steady growth for chocolate confectionery
- Chips on track for continued modest growth
- Non-chocolate confectionery sales grow 13% from 2012-17
- Frozen snacks recover from a bumpy few years, challenged by growing snack options
- Crackers need repositioning to remain competitive

Figure 10: Percentage growth in select snack categories, 2012-17

KEY PLAYERS – WHAT YOU NEED TO KNOW

- Good value and good taste provide a winning snack combination
- Snackers will continue to push the snack boundaries even further
- The future is fresh
- The next generation of convenience

WHAT'S WORKING?

- Good value and good taste provide a winning (vital?) snack combination

WHAT'S STRUGGLING?

- Nuts imply health, but struggle with value

WHAT'S NEXT?

- Expanding boundaries challenge snack brands, provide opportunity for all food/drink players

Figure 11: "Afternoon Snack Breaks," October 2018

- The future is fresh

Figure 12: Healthy snack attributes, May 2018

- Convenience redefined

THE CONSUMER – WHAT YOU NEED TO KNOW

- Majority of consumers snack 2-3 times per day
- Snackers are planning their snacks

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Fun and function are on par for snackers**
- **Snackers want their hunger satisfied**
- **Snack habits don't scream health, but shifts are seen**
- **Supermarkets continue to lead for snack purchase**

SNACKING FREQUENCY

- **Majority of consumers snack 2-3 times per day**
Figure 13: Snacking frequency, November 2018
- **Snack frequency increasing**
Figure 14: Snacking frequency, January 2015 and November 2018
Figure 15: Snack behavior – Change, November 2018
- **Men make up the largest share of super snackers**
Figure 16: Share of snacking, by gender, November 2018
- **Half of super snackers are under age 35**
Figure 17: Share of snacking, by age, November 2018
Figure 18: Snack behavior – change, by age, November 2018
- **Parents are strong targets for frequent snacking**
Figure 19: Snacking frequency – CHAID – Tree output, November 2018
Figure 20: Snacking frequency – CHAID – Table output, November 2018

REASONS FOR SNACKING

- **Fun and function are on par for snackers**
Figure 21: Snack motivations, November 2018
- **Younger shoppers are more likely to see snacks as functional**
Figure 22: Snack motivations, by age, November 2018
- **Consumers view snacks as helping maintain focus**
Figure 23: Snack attitudes – focus, November 2018

SNACK CHOICE DRIVERS

- **Flavor rules snack choice**
Figure 24: Snack purchase drivers, November 2018
- **Women are more calorie conscious**
Figure 25: Snack purchase drivers, by gender, November 2018
- **Moms are the most price conscious**
Figure 26: Snack purchase drivers, by parental status, November 2018
- **Affordability is key for younger snackers**
Figure 27: Snack purchase drivers, by age, November 2018
- **Lower earning HHs are not as reliant on health-focused snack attributes**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 28: Snack purchase drivers, by HH income, November 2018

- **Nutritional features appeal to Asian snackers**

Figure 29: Snack purchase drivers, by age, November 2018

SNACK OCCASIONS

- **Snackers are planning their snacks**

Figure 30: Snack behavior – Unplanned, November 2018

- **18-24s remain impulse snackers**

Figure 31: Snack behavior – unplanned, by age, November 2018

- **Snackers from higher earning HHs are most likely to plan snacks**

Figure 32: Snack behavior – unplanned, by HH income, November 2018

- **The morning snack occasion should not be overlooked**

Figure 33: Snack attribute by occasion*, November 2018

- **Two thirds of snackers replace meals with snacks**

Figure 34: Snack attribute by occasion* – Meal replacement, November 2018

- **Home and work are most popular locations for snacking**

SNACKING ATTRIBUTES

- **Snackers want their hunger satisfied**

Figure 35: Snack attribute by occasion – Any occasion, November 2018

- **Portable, energizing, fruit-based snacks are sought for morning snacking**

Figure 36: Correspondence analysis – Symmetrical map – Snack attributes by occasion, November 2018

Figure 37: Snack attributes by occasion, November 2018

- **Young snackers value satiety, energy, and affordability**

Figure 38: Snack attribute by occasion – Any occasion, by age, November 2018

- **Hispanic snackers lean toward health, Black snackers drawn to indulgence**

Figure 39: Snack attribute by occasion – Any occasion, by Hispanic origin, November 2018

Figure 40: Snack attribute by occasion – Any occasion, by race, November 2018

- **Portability is important to super snackers**

Figure 41: Snack attribute by occasion – Any occasion, by snacking frequency, November 2018

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

TYPES OF SNACKS CONSUMED

- **Snack habits don't scream health, but shifts are seen**
Figure 42: Snack behavior – Health, November 2018
- **Parents aren't instilling healthy snack habits in their children**
Figure 43: Snack behavior – Kids, November 2018
- **Younger snackers are least likely to exhibit health behaviors**
Figure 44: Snack behavior – Health, by age, November 2018
- **Snack choices are largely driven by convenience and satisfaction**
Figure 45: Snack diary, November 2018

IDEAL SNACK

- **Consumers say they want healthy snacks, but flavor remains important**
Figure 46: Snack attitudes – Health, November 2018
- **Flavor and convenience are key**
Figure 47: Snack attitudes -- Preferences, November 2018

SNACK PURCHASE LOCATION

- **Supermarkets continue to lead for snack purchase**
Figure 48: Snack purchase location, November 2018
- **...but mass merchandisers are closing in for primary purchase**
Figure 49: Snack purchase location – Most often purchase, March 2017 and November 2018
- **Super snackers are most likely to buy at mass**
Figure 50: Snack purchase location – Most often purchase, by snacking frequency, November 2018
- **Age and income play strong roles in purchase location**
Figure 51: Snack purchase location – Any purchase (Net*), by age, November 2018
Figure 52: Snack purchase location – Any purchase (Net*), by HH income, November 2018
- **Mass locations are key for moms**
Figure 53: Snack purchase location – Any purchase (Net*), by parental status, November 2018
- **More than one in 10 super snackers use online services**
Figure 54: Snack purchase location – Any purchase (Net*), by snacking frequency, November 2018
- **Online channels are slow to catch on in the snack space**

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- CHAID methodology
- Correspondence analysis methodology
- Consumer qualitative research
- Abbreviations and terms
- Abbreviations

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.