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## The Future of Snacking 2016

Chances are, within the past 24 hours, we've all had a snack. America is now snacking its way through each day. What does this profound change in eating and drinking behavior mean for the future of your business?





## Background & Approach

The notion of “three squares a day” has faded into the mists of history as dynamic cultural changes blur the boundaries between “snack” and “meal.” Snacking has emerged onto the landscape as the most significant food and beverage occasion.

Yet many companies continue to market to what we imagine when we think of meals and snacks: the bowl of cereal, the lunchtime sandwich, a quick bag of chips, and the family to share the meat and potatoes. However, by speaking only to these images, companies are missing out on new opportunities emerging from the dynamic changes taking place in American culture (in general) and our eating culture (specifically).

However, there’s more to it than that: consumers’ eating isn’t as random as it seems. It is shaped by an emerging system of contexts and beliefs. And consumers are redefining the parameters of snacks and meals as well as the planning process. Consumers are eating more often, in greater isolation, in the moment and on the go.

The Hartman Group’s **The Future of Snacking 2016** syndicated research report distills a plethora of qualitative ethnographic and quantitative survey data on consumer snacking attitudes and behaviors into concise implications for food and beverage retailers, manufacturers and brands.

### Study Objectives and Methodology

The study examines how three key drivers—snacking for Nourishment, Optimization and Pleasure—represent a thematic shift towards individualized and intentional snacking. Areas of focus include:

- kids and their impact on adult snacking habits
- snacking variation by occasion daypart and day of the week
- age cohort snacking patterns and attitudes
- alone snacking patterns
- on-the-go and immediate consumption snacking occasions
- retailer and snack category trends
- patterns of consumer snack sourcing

### Quantitative Methodology

- **Online snacking survey:** n=2,112 U.S. adults (ages 18-79), including a sub-sample of n=1,187 parents of children under 18, conducted in November 2016. Nationally representative balanced by age, gender, division, income, race/ethnicity and presence of children
- **Hartman Eating Occasions Compass:** The Hartman Group Eating Occasions Compass is a comprehensive database on American eating patterns, grounded in a complete enumeration of past-24-hour eating occasions. Sample size: 2012-2016 Adult eating occasions, n=102,340 and 2016 Adult eating occasions, n=18,233

### Qualitative Methodology

- One-on-one in-home interviews in the greater Seattle metro area
- Virtual interviews in: Florida, Massachusetts, Minnesota, New Jersey, New York and Texas
- Respondents age range: Millennials (18-37), Gen X (38-51), Boomers (52-70) and Silent (71-79)
- Primary household shoppers (50 percent or more of household shopping)



## Executive Summary

The modern era of snackified eating has fully emerged. With 91% of consumers snacking multiple times throughout the day, snacking is essential to daily eating for most Americans now and accounts for 50% of all eatings.

Traditional eating patterns centering on three “square,” structured meals a day remains a defining paradigm for Americans as an ideal. But in practice, modern eating styles are characterized by frequent snacking—so much so that 37% of the time, a snack provides one of the three most substantial eatings of the day for American consumers.

A confluence of several cultural shifts has led to the prominence of snacking.

These shifts include the erosion of food rituals centered on the nuclear family, rapidly changing wellness and culinary trends, and the growing access people have to food and food types.

As eating experiences that tend to be individualized and not shared, snacks are able to address consumer needs in ways that traditional meals often cannot.

The boundary between meals and snacks is blurring, but most people understand a meal to be shaped by cultural traditions around timing, setting, and food groups. Snacks, on the other hand, are highly personalized and variable.

Snacks often punctuate and bridge larger eatings but happen fluidly and spontaneously, often during other activities. As such, they are low or no prep and more easily satisfy demands for immediacy.

They are likewise less substantial, often containing fewer than 200 or 300 calories, and people do not hold snacks to the same nutritional standards as meals.

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### About the Report

Product Price:

- General report and accompanying data tables: ~~\$15,000~~ \$9,500

Release Date: January 2017

Report Length: 99 pages

Market Coverage: U.S. market

**To purchase the report, fill out the order form on the last page of this overview.**



## Executive Summary

The variable nature of snacks comes out in the language people use to describe what they are doing. As use of the term “snack”—a generalizing term—has declined by five percentage points since our 2013 survey, other synonyms and more descriptive terms have come into use in the consumer snacking lexicon.

Such increasing linguistic variation in the midst of widespread snacking behaviors speaks to a vibrant and evolving culture of snacking.

While the phenomenon of snacking is messy and at times hard to fully describe, coherence is brought to snacking by examining how three key drivers—Nourishment, Optimization and Pleasure—represent a thematic shift in food values and are connected to the needs driving snacking occasions:

### *Snacking for Nourishment*

- Hunger Abatement: Bridge the space between meals to prevent the distraction of hunger pangs
- Hydration Management: Reaction to a periodic “thirst trigger,” but increasingly a proactive and habitual behavior
- Sustained Energy: Proactively snack to maintain one’s reserves of stamina to meet the demands of life
- Condition Management: Provide structure to an eating style intended to help consumers manage health and diet

### *Snacking for Optimization*

- Quick Energy: Bring energy back to one’s baseline or even provide an extra boost of strength and vitality

- Recovery & Rejuvenation: Restore equilibrium by recovering lost nutrients, fluids and depleted energy levels
- Mental Focus: Perform at a high level cognitively, or simply “be present” while engaging in life, work and play
- Stress Management: Relief of systemic imbalances and a chronic state of stress and fatigue

### *Snacking for Pleasure*

- Comfort & Craving: Physical experience and/or emotional gratification of experiencing desired tastes and textures
- Indulgence & Reward: “Treating” and self-care, physical delight on the palate and celebration of big or small achievements
- Variety: Diversity of flavor and texture that keeps eating and drinking interesting
- Discovery: Food exploration into food types, provenances, preparation methods, food purveyors and new products

As consumers manage a customized approach to eating through their snack choices, they negotiate their own sense of balance between the desire for Nourishment, Optimization and Pleasure in their daily choices.

- However, this customized balancing act can be fraught with tension as consumers weigh aspirations and actual behaviors, benefits and detriments.
- Despite being a solution to a range of needs, many consumers see snacking as a pitfall for overconsumption. 36% of consumers report actively trying to limit the amount they snack.



## Report Order Form

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