

A NEW WORLD OF SNACKING

HealthFocus Consumer Report Highlights



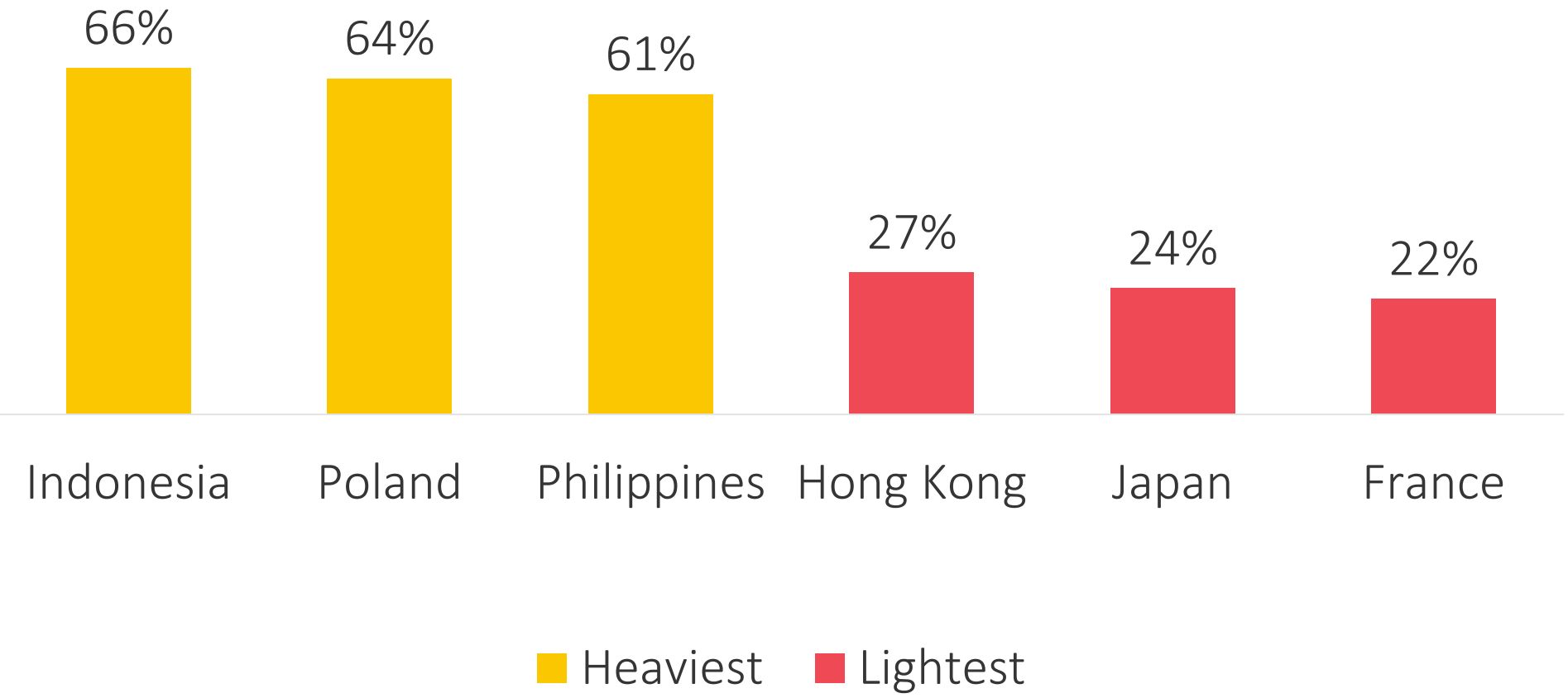
Introducing A New World of Snacking

Eating habits have changed dramatically over the past decade. Snacks emerge as a replacement for the traditional three meals a day at the dinner table, offering a more-flexible framework easily tailored to each person's needs and schedule.

Convenient, on-the-go snacking options used to satisfy consumers; now that snacks have become ingrained in their everyday routines, consumers are more mindful and more selective. They now approach snacks with the same scrutiny as their meal choices, and expect healthier options, even in indulgent categories.

48% of global shoppers consume 2+ snacks on a typical day!

Market Opportunities: Heaviest and Lightest Snackers
Consumes 2+ snacks per day



Consumers Rewrite Rules for Snacking

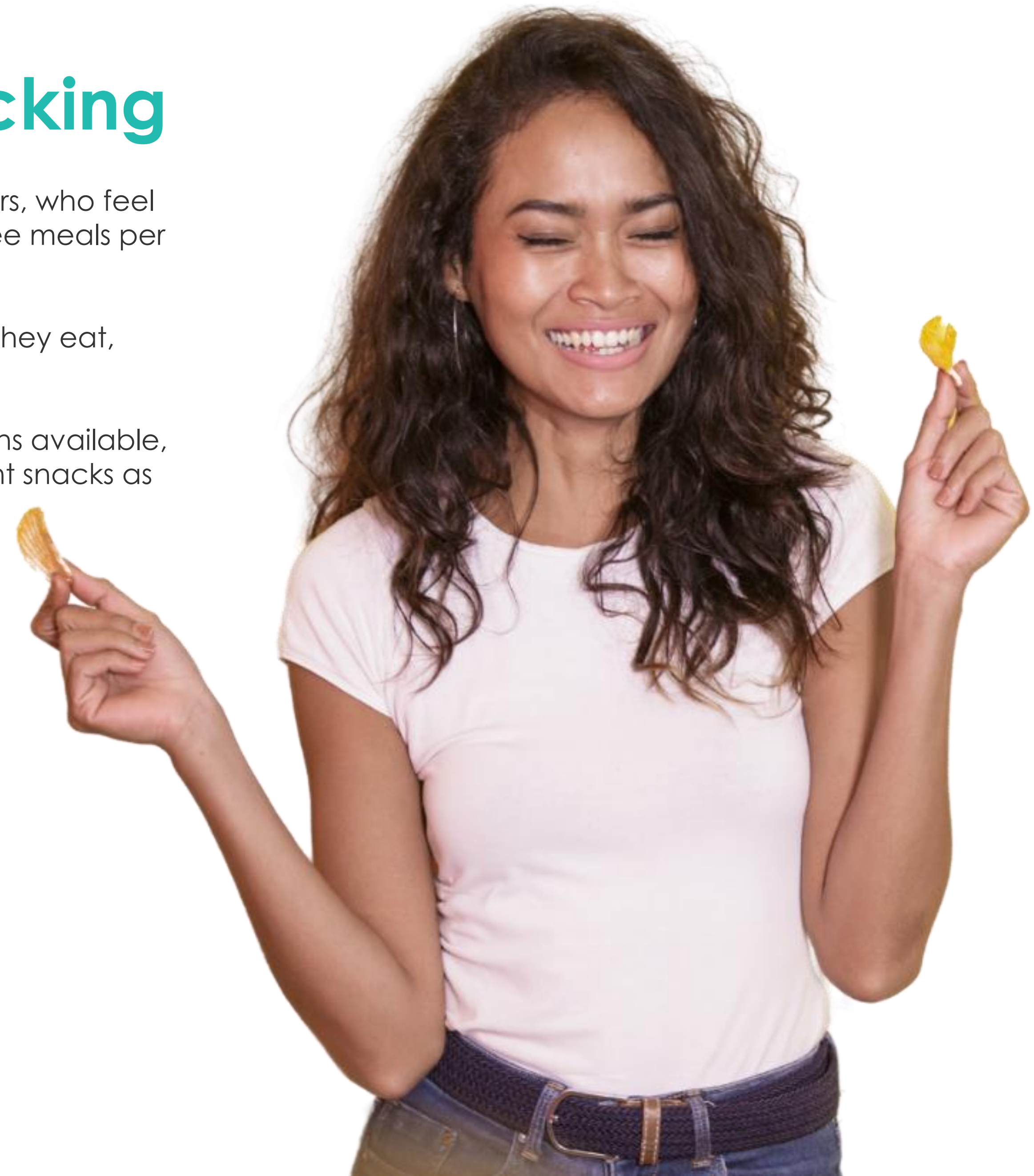
The distinction between meals and snacks have blurred among younger consumers, who feel frequent healthy snacking throughout the day is just as good as the traditional three meals per day model.

Nearly half of consumers don't have consistent patterns for when and how much they eat, highlighting the importance for healthy snacks to fill this need space.

Globally, 45% are approaching snacks with the goal of finding the healthiest options available, while 38% take a more balanced approach saying they allow themselves indulgent snacks as part of an overall healthy diet.



**45% of global consumers
look for the healthiest
snack options available**





Core Drivers to Snack Selection

The top 5 drivers to snack selection globally are: taste, natural, price, lower sugar, and made with fruits/vegetables.

Still emerging drivers that fall to the bottom of snack priorities include: experimental or global flavors, customizable, single-serve packaging, plant based, and made from socially responsible companies.

In the 2024 Global Report: *A New World of Snacking*, HealthFocus explores the top drivers by individual market, revealing some unique opportunity areas.

High Priority: Top 5 Snack Drivers

| | |
|-----------------------------|-----|
| Taste | 74% |
| Natural | 64% |
| Price | 64% |
| Lower sugar | 61% |
| Made with fruits/vegetables | 60% |

Low Priority: Bottom 5 Snack Drivers

| | |
|--------------------------------|-----|
| Socially responsible company | 47% |
| Plant based | 44% |
| Single-serve package | 40% |
| Customizable | 38% |
| Experimental or global flavors | 33% |

Appealing to Young Consumers

In appealing to younger consumers, adventure plays a strong role.

52% of consumers under 30 years old claim experimentation/trying new things is extremely or very important in their food and beverage choices – and 46% say experimental or global flavors are highly important in snack selection, 9 points ahead of total consumers.

Convenience and single-serve packaging are also a key distinction for this cohort, by an almost 10-point lead over total consumers.

Top 5 Differences in Snack Selection

18-29 Year Olds vs. Total

| | |
|--------------------------------|--------|
| Experimental or global flavors | +9 pts |
| Convenience (e.g., portable) | +9 pts |
| Single-serve packaging | +9 pts |
| Socially responsible company | +7 pts |
| Customizable | +7 pts |



WANT TO LEARN MORE? CHECK OUT OUR REPORT: “A NEW WORLD OF SNACKING”

There is a new world of snacking: consumers now are less willing to overlook their health preferences when choosing snacks.

“Eating habits have changed dramatically over the past decade. Snacks emerge as a replacement for the traditional three meals a day at the dinner table, offering a more-flexible framework easily tailored to each person’s needs and schedule.

Convenient, on-the-go snacking options used to satisfy consumers; now that snacks have become ingrained in their everyday routines, consumers are more mindful and more selective. They now approach snacks with the same scrutiny as their meal choices, and expect healthier options, even in indulgent categories.” — Angela Johnson, Dietary and Nutrition Insights Manager, MS, RD

This report is a comprehensive update on the evolution of snacking, including how and why consumers implement snacking into their daily food equation. Our clients will better understand shopper motivations and attitudes, (globally, regionally, and across 25 individual markets) so they can connect more powerfully and more profitably to their end users.

Some of the many topics addressed in the report include:

- An overview of the current snacking landscape, highlighting variation in key demos and regions, including snacking habits, changing use (e.g., as meal replacements), increased/decreased focus on healthy snacks, snack avoidance, etc.

- Consumer-ranked importance of 25+ drivers to snack selection (e.g., lower fat, lower sugar, higher protein, premium ingredients, plant based, organic, single-serve packaging, fortified, health benefits, functional benefits, etc.)
- The search for healthier indulgence
- How needs and priorities for selecting snacks (e.g., nutrition, taste, convenience, hunger, energy level, and indulgence) change throughout the day
- and much more!

Markets Included:

- North America: USA and Canada
- Latin America: Brazil and Mexico
- Europe: France, Germany, UK and Poland
- Middle East & Africa: Saudi Arabia, Turkey, Nigeria and Egypt
- South Asia: India and Pakistan
- East Asia Pacific: Australia, China, Hong Kong, Indonesia, Japan, Philippines, Thailand, South Korea, Malaysia, Taiwan, and Vietnam

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