



Snacking: Emerging, Evolving and Disrupted

A HARTMAN GROUP NATIONAL SYNDICATED RESEARCH REPORT

THE COVID-19 PANDEMIC HAS SIGNIFICANTLY ALTERED THE CURRENT NATURE OF SNACKING IN AMERICA.

The pandemic has altered consumers' schedules, increased their time at home, changed work environments, reduced social interactions, isolated household units, introduced fears around food procurement, and shifted emotional states in the direction of both boredom and heightened anxiety. With these changes, snacking needs and routines have also evolved.

The nature of snacks has also changed in divergent ways. Many snack with their households, but others are now more isolated. Some have taken the opportunity to clean up their snack diets, while others have slipped into less healthy patterns. Some reach for fresh produce more, and others for indulgent snacks. Some seek comfort in the familiar, while others would like to explore new tastes and formats to combat pandemic ruts.

Ultimately, there is no easy shortcut for understanding what is currently happening in the snacking space, and each sub-current must be examined in its own right.

The *Snacking: Emerging, Evolving and Disrupted* report covers such topics as:

- Consumer attitudes towards snacking
- Drivers for snacking occasions
- Evolution of snacking habits and frequency
- Planning and sourcing for snacking occasions
- Impact of COVID-19 pandemic on snacking habits and drivers

On the following pages is a comprehensive look at what's inside The Hartman Group's *Snacking: Emerging, Evolving and Disrupted* syndicated research report.



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METHODOLOGY

- Integrated qualitative and quantitative methodologies
- **Quantitative:** A nationally representative online survey of n=2,008 U.S. adults (aged 18–74), primary shoppers conducted in August 2020. Results weighted to U.S. Census balance for age, gender, income, census division, and kids in HH.
- **Mobile Qualitative:** 7-day asynchronous task assignment via specialized mobile app. All tasks were completed remotely due to COVID-19, and no participants were asked to visit a store or public area for safety reasons.
- **Follow-Up Interviews:** 7 consumers also participated in a 1-hour follow-up interview to contextualize task uploads and dig deeper into key topic areas.

ABOUT REPORT

What You Get: General report (PowerPoint and PDF) including executive summary and demographic data tables (Excel).

Release Date: December 2020 Report Length: 126 pages Market Coverage: U.S. market

Price: \$15,000 **Now: \$10,000**

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WHAT'S INSIDE THE REPORT

EXECUTIVE SUMMARY — Topline Overview

- The COVID-19 pandemic has significantly altered the current nature of snacking in America.
- The ways in which snacking has evolved are as unique as individual consumers and their households.
- Snacks continue to fulfill existing needs, and some new ones, in consumers' lives.
- The number of divergent yet overlapping needs create tensions that consumers need to resolve in their snacking choices.
- There are several baseline criteria that snacks must meet. While no one of these is non-negotiable, taste, convenience, price, and brand feature prominently into the calculus of snack choices.
- Beyond taste, convenience, price, and brand, however, a broader range of considerations come into play.
- The COVID-19 pandemic has affected each individual differently, but some consumer segments share a common set of changes in their lives and consequently similar changes in their snacking habits.
- Restaurant closures and fears of spending time indoors have sent consumers looking for alternative ways to source snacks.

The Culture of Snacking in the U.S. Today

- The culture of snacking in the U.S. is constantly evolving
- Long-term cultural shifts will continue to significantly shape how American consumers snack for years to come
- Snacks are often defined by what they are not—meals—though the line between meals and snacks can be blurry
- There are significantly fewer culturally shared expectations, rituals, and routines around snacking
- Many use the term “snack” for non-meal occasions, but this masks other, more idiosyncratic terms
- The COVID-19 pandemic has dramatically altered the context in which American consumers snack today and for the future
- Level of concern about different aspects of food procurement under COVID-19 (chart)
- Snacks as percentage of all eating occasions / Number of food and beverage items consumed per snacking occasion (charts)
- Trends in traditional snack sales (chart)
- Changes in past-6-month snacking frequency vs. a year ago (chart)
- Effect of increased snacking on meals / Frequency of meal replacement / Meals replaced (charts)
- Reasons for increased snacking vs. a year ago (chart)
- Reasons for decreased snacking vs. a year ago (chart)
- Percentage of Total Population Participating in Eating Occasions (chart)



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- Consumer approaches to snacks and meals (chart)
- Alone vs. Together Snacking by Daypart (chart)
- Frequency of snacking alone / Frequency of snacking alone by household composition (charts)
- Location of Occasion by Daypart (chart)
- Changes in snacking specifically due to COVID-19 (chart)
- Reported changes in consumer activities due to COVID-19 (chart)
- Changing use of different types of snacks (chart)
- Chapter summary: The Culture of Snacking in the U.S. Today

The Modern Snacking Framework

- The Modern Snacking Framework helps explain how consumers approach and think about snacking today
- The four snacking drivers capture how snacking motivations and needs shift according to the occasion, context, and individual
- While some snacking occasions are uniquely oriented to one driver, the reality of consumers' snacking priorities means that the four drivers are not mutually exclusive
- Presence of Consumer Needs by Snacking Drivers (charts)
- Snacking attitudes aligned to snacking pillars (chart)
- Alignment of Snacking Drivers by Daypart Snacking Occasion (chart)
- Snacking for Nourishment spans a range of behaviors focused on addressing both basic needs and positive nutrition aspirations in the service of long-term health goals
- Key attitudes related to Nourishment (chart)
- Consumer choices for Nourishment encompass fresh and packaged snacks that deliver nutrition and satiety without compromising on taste
- Snacking for Optimization characterizes consumer approaches that are oriented to targeting specific physical, mental, and emotional needs that are more compartmentalized and therefore difficult to isolate through meal occasions
- With greater work and family responsibilities, Millennials hold many Optimization-aligned snacking attitudes
- Beverages stand out as common consumer choices in snacking for Optimization and range from traditional choices such as coffee to more trend-forward functional inclusions
- Snacking for Pleasure describes consumer needs that range from epicurean delight to more quotidian experiences
- Key attitudes related to Pleasure (chart)
- Beverages stand out as common consumer choices in snacking for Optimization and range from traditional choices such as coffee to more trend-forward functional inclusions
- Snacking for Pleasure describes consumer needs that range from epicurean delight to more quotidian experiences
- Key attitudes related to Pleasure (chart)



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- Many Pleasure-oriented snacking occasions tend to showcase sweeter flavors, and though some seek out bold or unusual flavors, familiar tastes and formats remain important
- Snacking for Distraction captures a variety of behaviors that have been prevalent among U.S. consumers for many years but which have taken on new relevance as consumers stay at home more often during the pandemic era of lockdowns, quarantines, physical distancing, and learning/working from home
- Snacking for Distraction has increased significantly during the COVID-19 pandemic
- Key attitudes related to Distraction (chart)
- Occasions that demonstrate more Distracted snacking behaviors represent a broad spectrum of opportunistic snacking choices that are motivated by a range of emotions
- Chapter summary: Snacking Routines and the Modern Snacking Framework

Evolving Snacking Considerations

- With an array of motivations and needs, consumers inevitably are faced with tensions in their snacking
- VERY IMPORTANT criteria when deciding on snacks to consume (chart)
- VERY IMPORTANT criteria when deciding on snacks to consume: Positive nutrition and avoidance of negatives / Quality, purity and values (charts)
- Consideration: taste and flavor (chart)
- Consideration: convenience (chart)
- Consideration: price (chart)
- Consideration: Brand. Purchase criteria across 7 snack categories / Preference for favorite brands (charts)
- There is also room for new entrants, such as brands that offer a chance to explore or private label options
- Frequency of having different types of snacks (chart)
- The tension between healthy and more indulgent snacking approaches also manifests in how consumers have adjusted to living in a pandemic: Compared to before the COVID-19 pandemic...(chart)
- One way that consumers strive to limit the amount of unplanned snacking they do is through curation of options and portion control (charts)
- The pandemic has increased the amount of snacking motivated by stress and has brought mental health to national-level spotlight (charts)
- Views on snacking as a health management tool (chart)
- Regardless of changes to their overall snacking approach, consumers continue to pay attention to what their snacks deliver to their bodies (chart)
- Search for high quality, including organic products, has also taken a back seat to more pressing pandemic concerns (charts)
- Consideration: packaging
- Concerns about sustainable packaging are present, but consumers make their choices based on more personal needs (charts)
- Sustainability vs. Single Serving as purchase criteria across 7 snack categories (chart)



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- Chapter summary: Evolving Snacking Considerations

Profiles in Snacking: Overwhelmed Families, Shifting Workforce, and Generational View

- Personal circumstances have shaped different consumers' snacking experiences during the COVID-19 pandemic
- Snacking has become a coping mechanism for many parents (charts)
- Desiring to control snacking habits for themselves and their children, parents and caregivers strive to introduce some structure into the process (chart)
- Changes in household dynamics around snacking specifically due to COVID-19 (chart)
- VERY IMPORTANT snack characteristics for families (chart)
- VERY IMPORTANT snack characteristics for families: Positive nutrition and avoidance of negatives / Quality, purity and values (charts)
- Attitudes around snacking with children in the household (chart)
- The unprecedented shift to remote work and study has affected telecommuters and those who have lost some or all work, but in more complex ways than one might expect
- Full-/Part-time Workers and Students Participating in Eating Occasions (chart)
- Telecommuting workers and students have been able to make more health-supportive choices in their snacking (charts)
- In addition to making healthier choices, telecommuters are less likely to have a strained relationship with snacking (charts)
- Snacking represents a higher portion of all eating for younger consumers, while older generations stick to the three main meals more often (charts)
- The COVID-19 pandemic has restricted consumers' freedom to choose who they eat with, with different consequences for younger vs. older consumers (chart)
- Older generations have a more relaxed relationship with snacking (chart)
- Eroding snacking occasion needs among Boomers / Growing snacking occasion needs among Gen Z (charts)
- Chapter Summary: Profiles in Snacking

Sourcing Snacks in 2020

- Food sourcing in general has shifted from food service to retail in 2020, but restaurants remain dependable sources for on-the-go snacking for many consumers (charts)
- Consumers looking for an easy, tasty snack continue to utilize food service options in multiple ways
- Past-24-hour snack sourcing (dining out excluded) / Retailers used in past-24-hour snacking (chart)
- Snack sourcing at retail in the past 3 months (chart)
- Certain retailers in particular stand out to consumers as destinations specializing in snacks: Trader Joe's/ Costco/H-E-B
- Changes in online shopping for groceries and snacks due to the COVID-19 pandemic (chart)



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- 10 snack categories MOST often bought online / 10 snack categories LEAST often bought online (charts)
- Snack sourcing approaches (chart)
- Snack subscriptions have brought opportunities for discovery of formats, products, and new flavors
- Chapter Summary: Sourcing Snacks in 2020

Snacking: A Category Focus

- Categories purchased for snacking in the past 3 months (chart)
- Top Foods and Beverages by Snacking Occasion Daypart (chart)
- Purchase criteria across 7 snack categories (chart)
- Salty snacks bought in past 3 months (chart)
- Sweet snacks bought in past 3 months (chart)
- Fresh snacks bought in past 3 months (chart)
- Beverage snacks bought in past 3 months (chart)
- Energy, nutrition, and protein snacks bought in past 3 months (chart)
- Frozen snacks bought in past 3 months (chart)
- Chapter Summary: Snacking: A Category Focus

Implications and Recommendations

- Snacking and the COVID-19 Experience: Snacking daypart; the future of work; health-focused snacking behaviors and aspirations
- The Modern Snacking Framework: Consumer snacking needs; consumer snacking tensions
- Long-term Cultural Trends in Snacking: The language and culture of snacking; taste & flavor exploration; sustainability and social justice
- Age and Life Stage Considerations: Families with children; generational differences
- Snack Sourcing: Retailers and Online: Retailer alignment; online snack sourcing
- Snack Sourcing and Restaurants
- Evolving Snacking Considerations: Top consumer priorities



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