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Future of Snacking 2024:
Balancing Intent with
Indulgence

A Hartman Group Syndicated Research Study

**Fielded January – February 2024
Market Coverage: U.S. Market**



**CONSUMER/
SHOPPER INSIGHTS**



**FORESIGHT
AND TRENDS**



**STRATEGIC
CONSULTING**



**INNOVATION
AND IDEATION**



Future of Snacking 2024: Balancing Intent with Indulgence examines the ever-shapeshifting snacking occasion. Mini meals, continuous grazing, leftovers, and snacks that become meals now blur the distinction between what is a meal versus a snack.

With such a plethora of non-meal occasion types, *Future of Snacking 2024* provides the keys to success for food producers, manufacturers, retailers, and restaurants to better navigate this new era of snacking while gaining strong traction with today's consumers.

Hartman Group Syndicated Report Published: March 2024
Report Length: 116 pages | Market Coverage: US Market

Grounded in primary quantitative and qualitative research, the report offers a comprehensive consumer-based perspective for brands, retailers, and manufacturers to identify which snacking trends will maintain relevancy and where to spot opportunities for long-term growth.

What's included?

- Executive summary
- General report (PowerPoint and PDF)
- Demographic data tables (Excel)

Key Topics Covered:

- Role of intentional snacking and healthy/premium snacks
- How Hartman Group's proprietary Modern Snacking Framework underscores both the needs and benefits consumers seek when snacking
- How to identify opportunities in development and positioning
- Cultural importance of snacking in fostering connection and celebration
- Where your brand or company can make the greatest impact



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EXPLORE THE REPORT

Methodology

- **Quantitative:** Online national survey January 28, 2024– February 6, 2024, n=2,011 U.S. residents aged 18-77. (MOE) ± 2.2 pts at 95% confidence level.

Respondents recruited based on age-based quotas and balanced to match the 2023 Census Bureau Current Population Survey by gender, region, income, household structure, and ethnicity.

- **Qualitative:** Digital ethnographies: n=14 participants. Week-long immersive engagement via asynchronous virtual platform.

Follow-up in-depth interviews: n=9 participants. Hour-long interviews focused on delving into responses from digital ethnography.

Executive Summary

- The report highlights intentional snacking with a trend towards healthy and premium snacks. With snacks accounting for half of all eating occasions, we explore how consumers are working to shift their snacking mindset from guilt to enjoyment as they continue to become more intentional in their choices. Hartman Group's Modern Snacking Framework helps marketers understand both the needs and benefits consumers seek when snacking. The model provides a foundation for identifying opportunities in product development and positioning. Four pillars come through in the framework: Nourishment, Optimization, Pleasure and Distraction.
- Nourishment and Optimization both focus on ingredients in snacks and are chosen on occasions where hunger, health and energy are required.
- Pleasure is the pillar that represents positive emotions of exploration, adventure and stimulating the senses.
- Distraction is the only pillar that involves unintentional snacking. It is a pillar consumers would like to minimize.



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Chapter One: Evolving Snacking Culture

Consumers are becoming more intentional in their snacking, prioritizing health and wellness while not forgetting indulgence.

- Examining snacking as a cultural phenomenon and the meaning behind snacks encompassing half of all eating occasions (analysis)
- How health-conscious and varied eating patterns reflect a change in American snacking habits (analysis)
- Defining how snacking has become a strategy for achieving health and emotional goals (analysis)
- Identifying and unpacking leading consumer snack preferences (analysis)
- What actions consumers are taking to shift their snacking mindset away from guilt (analysis)
- How snacking can meet both satisfaction and mindful eating aspirations (analysis)
- An exploration into intentionality and snack choice (data, analysis)
- Exploration of desired changes in what consumers are snacking on (chart)
- How the marketplace is responding to consumer demands for healthier snacks (data, analysis)

Chapter Two: Snacking Today

Snacking accounts for half of all eating occasions; however, traditional snack foods have made their way into meals.

- What differentiates snacks from meals (analysis, data)
- Diverse terminology used for non-meal occasions (chart, analysis)
- Changes in snacking frequency compared to a year ago (analysis, data)
- Reasons for changes in snacking consumption (chart)
- Exploring the overlapping relationship between meals and snacks (analysis, chart)
- Identifying the who, what and why behind consumers who skip meals to snack throughout the day (analysis, data)
- The uptick in using snack items as an ingredient in a meal (analysis, data)
- When and why snacks become meals (analysis, chart)
- Shifts in dayparts among snacking occasions compared to two years ago (data)
- Snacking across dayparts by generation (data)
- Alone vs. snacking together by daypart (data)
- Where consumers are snacking across the day (daypart)



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Chapter Three: The Modern Snacking Framework

Consumers snack for Nourishment, Optimization, Pleasure and Distraction, with the time of day also influencing the snack chosen.

- Understanding the needs and benefits sought by consumers when snacking (model, analysis)
- How each snacking pillar captures motivations and incorporates occasions to unlock opportunities (analysis, chart)
- Defining the pillars (analysis, data)
- Presence of consumer need by snacking pillar (chart)
- Overlap among consumers' four snacking motivations (analysis, chart)
- Snacking pillar by daypart snacking occasion (analysis, chart)
- Top motivations and key attributes in the Nourishment Snacking Pillar (data, analysis)
- Key attitudes related to Nourishment Snacking Pillar (data, analysis)
- Top motivations and key attributes in the Optimization Snacking Pillar (data, analysis)
- Key attitudes related to Optimization Snacking Pillar (data, analysis)
- Top motivations and key attributes in the Pleasure Snacking Pillar (data, analysis)
- Key attitudes related to Pleasure Snacking Pillar (data, analysis)
- Top motivations and key attributes in the Distraction Snacking Pillar (data, analysis)
- Key attitudes related to Distraction Snacking Pillar (data, analysis)



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Chapter Four: Snacking Considerations

Consumers make trade-offs in their snacking evaluations, with taste, convenience and better-for-you options being most important.

- Identifying the multiple, competing needs consumers bring into their snack choices (analysis)
- How tradeoffs are made on snack occasions (analysis)
- Most important criteria when deciding which snacks to consume (chart)
- Role of taste when choosing a snack (analysis, data)
- Spicy snack seekers by generation (analysis, data)
- Snack flavor trends indicate changing palates (analysis)
- Demographics driving interest in global snack flavors and formats (data, analysis)
- Role of texture and personalized snacking experiences (analysis)
- Role of convenience in determining snack versus meal (analysis, data)
- How often consumers have different types of snacks in a week (chart)
- What is most important when deciding which snacks to consume (chart)
- Role of better-for-you snacks in the modern consumers' snack repertoire (analysis)
- How protein-rich snacks meet the needs of varying demographics (analysis)
- Perception of quality in snack choice (chart)
- Role of price and impact on snack choice (chart, analysis)
- The meaning of value in snacking (chart, analysis)
- Novelty versus familiarity in snacking (analysis, chart)
- Frequency of trying new brands (analysis, chart)
- Role of packaging (analysis, data)
- Packaging attributes for on-the-go consumption (analysis)
- Consideration of sustainability and packaging when choosing a snack (data)
- Incorporating consumer tradeoffs when innovating in the snack category (analysis)



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Chapter Five: Discovering and Sourcing Snacks

Discovery happens mostly at shelf, but social media also plays a role.

- Where new snacks are discovered (data, analysis)
- How consumers learn about a snack brand (chart)
- Importance of restaurant and food service in snack sourcing (analysis, data)
- Sources for purchasing snacks for immediate consumption (chart)
- Role of traditional grocery and mass for snack purchasing (analysis, chart)
- How convenient sourcing plays out for various generations (chart, analysis)
- Role of snack planning and sourcing (chart)
- Personalized snack preferences and planning in advance (analysis)

- **Chapter Six: Spotlight on Snacking with Children**

Snacking can be a social event that brings families and friends together.

- Snacking as connection in modern culture (data, analysis)
- Snack occasions and kids in the household (chart)
- Attitudes around snacking with kids in the household (data, analysis)
- Important snack characteristics among families (chart)
- Parents' needs around purity when choosing snacks for kids (chart)
- Teens, snacking and independence (analysis)
- Teens, snacking and experimentation (analysis)

Chapter Seven: Category Focus

Consumers choose snacks in different categories with texture, taste and convenience being important considerations.

- Top 20 snack categories purchased in the last three months (chart)
- Snacking choices reflected in daypart (data)
- Most important attributes when choosing a snack (chart)
- Category in Focus: Salty Snacks (data, analysis)
- Category in Focus: Sweet Snacks (data, analysis)
- Category in Focus: Fresh Produce (data, analysis)
- Category in Focus: Dairy and Dairy Alternative Snacks (data, analysis)
- Category in Focus: Beverages (data, analysis)
- Category in Focus: Energy, Nutrition and Protein Bars (data, analysis)
- Category in Focus: Frozen Snacks (data, analysis)
- Category in Focus: Fresh Snack Packs (data, analysis)

Chapter Eight: Innovation and Recommendations



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Glossary of Terms

Analysis: Skilled interpretation and translation of consumer culture.

Chart: Visual representation of quantitative survey responses, such as a bar chart.

Data: Specific data point(s) from quantitative survey used to highlight a compelling insight.

Model: Hartman Group's proprietary model provides a framework for explaining how and why consumers make purchase/consumption decisions, thus helping brands navigate the consumer journey and ensuring relevancy within the marketplace.



Available to purchase now: *The Future of Snacking 2024: Balancing Intent with Indulgence*

Report Price: \$12,500 (until April 15th, 2024. \$15,000 after April 15th, 2024.)

To purchase, fill out the form below and return by email to: Melissa@hartman-group.com

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