

MODERN EATING AND THE NEW CULTURE OF SNACKING

About nine in ten (91%) consumers snack multiple times throughout the day.

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As The Hartman Group's 2013 Modern Eating report first highlighted, traditional eating patterns built around three "square," structured meals a day has given way to modern eating styles characterized by frequent snacking that often occurs unsystematically and varies from person to person.

Snacking is now so entwined in our food and beverage culture that it makes up fully half of all eating occasions, and 47% of US consumers say that most days they can't get through the day without a snack.

What's happening to America's traditional eating behaviors and patterns? We now eat and drink what we want, when we want and anywhere we want. Sometimes planned, more often on a whim. An energy bar or fruit smoothie may replace breakfast one day or serve as lunch the next day. Perhaps a bowl of cereal before bedtime. Nothing seems to be as it once was. We long for the good old days when meal planning and eating was all so routine and predictable.

As haphazard as that behavior seems, the patterns are not random. Eating is tied viscerally to the changing rhythms of people's daily lives, including their perception that they are overbooked and their need to feel healthy and satisfied by food at the same time they take care of their families' disparate eating needs.

The challenge for food and beverage companies is to understand these new and changing rhythms continues today as we welcome food culture's new era of retail disruption

and diversification that snacking has unleashed.

"How we go about planning, acquiring and consuming food has been disrupted, and the result of that disruption has been in many cases the displacement of meals and a lot of variation in when and how and what gets consumed. An elevated focus on food and beverage for nutrition and a growing interest in global flavors have fueled an evolution in snacking behaviors and preferences," said Tamara Barnett, Vice President of Strategic Insights at The Hartman Group.

The Hartman Group's research finds that modern food and beverage culture is marked by fragmentation and an upending of tradition. While culturally we idealize three balanced meals a day, we rarely eat that way. Today, meal planning, shopping and cooking is decentralized, and there are fewer rules about what to eat and drink. In fact, we are much more comfortable with eating on the fly. Eating and drinking can happen anywhere and everywhere and at any time. No eating or drinking occasion typifies the fragmented, decentralized and no-rules modern food and beverage culture more than *snacking*.

Evidence of this shift in behavior can be seen in the emergence of restaurants as a source for snacks. The Hartman Group's Future of Snacking 2016 report finds that, despite being the source for 81% of snack occasions, traditional food retailers are losing share to a divergent array of alternative retail sources notably restaurants. Restaurants have become increasingly savvy about emerging consumer needs for smaller menu items within the now-blurry space between meals and snacks.

"Snacking was about diversion and fun before," Barnett points out, highlighting a shift toward health and wellness, fresh and premium. "The food industry has responded to this desire for fresh and minimally processed food and beverages, and there has been a proliferation of small, premium-quality brands that are now competing with those larger legacy brands."

Snacking is no longer about a specific product category but rather about a set of behaviors -a way of eating and drinking a kind of occasion. In other words, anything and everything can be a snack -and increasingly is.

It's little wonder then why forward-thinking food manufacturers, retailers and food service operators are in a race to reformulate, repackage, reportion and revamp products and menus to better fit with these changing eating and drinking habits.

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The Hartman Group's Culture of Food 2015: New Appetites, New Routines report details the shifts that lead to snacking, describing how consumers eat around their schedules rather than scheduling around mealtimes. Dinner has become a mere pause between other activities. Lunch is often scheduled out to accommodate an overflow of meetings and must-do's. And breakfast can be multitasked between commuting and working. This is our modern time deficient, which is heavily influencing an ad hoc shift in eating styles.

The ad hoc approach to mealtimes is increasingly part of new eating routines. While dinner remains an important social meal occasion, breakfast and lunch occasions are routinely "snackified," especially during the workweek. This opens up schedules and frees up time from planning, cooking and cleaning.

On these no-cook, snackified occasions, consumers are eating a mix of packaged and prepared foods (yogurt cup, deli sushi/sandwiches) with some fresh ingredients (snacking fruit, salad bar). Or they may outsource these low-stakes occasions to food service. Reflecting these changes in eating habits, dining out is not just for special occasions but an everyday approach to "getting food".

While a good deal of the shifts in food and beverage culture have been towards fresher and less processed foods, the fact is that we are giving up meal occasions with others or combining eating with other tasks as the need for productivity compels us to move forward. Many consumers also believe that hectic American lifestyles lead to poor eating habits.

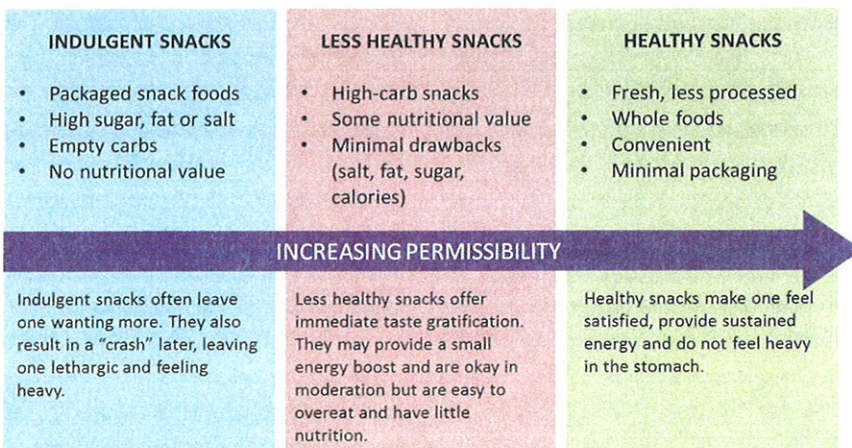
Beyond the increased frequency with which we snack, snacks themselves have evolved far beyond conventional categories to include fresh items and higher-quality products and involve both food and beverage items.

Trend Toward Healthier

Snacking is becoming healthier, and healthy snacking is as much about ways of eating as it is about product attributes, with beliefs that eating small amounts of food every few hours is healthier than eating three big meals a day, that distributing small treat moments helps to avoid overindulgent binges and that overall balance can be achieved by rotating indulgent and non-indulgent.

HEALTHY SNACKS

Most consumers eat a variety of snacks that differ in their permissibility. With less healthy snacks, consumer confront trade-offs.



Source: Health & Wellness 2015 Report, The Hartman Group

Shopping for Snacks

With so many channels and stores available to consumers, shoppers keep a working geography of stores and restaurants that reflect certain patterns in snack purchasing and consumption behavior. These behaviors include:

- » **Pantry stocking for snacks.** Occurring most notably at grocery, supercenter, mass market and club retailers.
- » **Trips for immediate-consumption snacks.** Are being made most notably to restaurants, convenience stores and drugstores.
- » **Snack stashing.** Occuring when consumers primarily source from home to have snacks on hand throughout their day.

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.

"Snacks should be developed to deliver on the increasing need for nourishment, optimization or pleasure on the go. Consider not only how package design can simplify on-the-go user experiences but even how the product itself can really enable a mobile lifestyle."

The future of snacking, Barnett said, will fully embrace freshness. Retailers and manufacturers alike should consider offering a product mix that reflects the desire for fresh but also recognizes the role of iconic and more processed favorites. "Think about fresh expectations that consumers now have when it comes to snacks. Does your product formulation as well as all aspects of the product signal contemporary notions of freshness and quality, or does it need to be revamped?"

The Hartman Group

The Hartman Group is at the leading-edge of demand-side food and beverage strategy. Our anthropologists, social scientists and business analysts have been immersed in a 25-year-long study of American food and beverage culture using ethnographic observation, quantitative tracking surveys and deep study of food and beverage trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, thereby identifying unique opportunities and winning strategies for our clients.

What do consumers take into consideration when shopping for snacks?

Barnett says that, as the Future of Snacking 2016 report finds, while the phenomenon of