INTRODUCING THE

STATE OF

SNACKING

2019 AMERICAN CONSUMER SNACKING TRENDS STUDY BY:

Mondelez International

The Harris Poll

Harris Insights & Analytics LLC, A Stagwell Company
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METHODOLOGY

This survey was conducted online by The Harris Poll on behalf of Mondelēz International from September 16 - 27, 2019, among 6,068 global adults ages 18 and older. The research spanned 12 markets, including: The United States (n=504), Canada (n=506), Mexico (n=505), Brazil (n=515), France (n=501), Germany (n=503), The United Kingdom (n=501), Russia (n=515), China (n=503), India (n=508), Indonesia (n=504), and Australia (n=504). Other key groups analyzed include: Centennials ages 18-22 (n=602), Millennials ages 23-38 (n=2404), Gen Xers ages 39-54 (n=1702), Boomers ages 55-73 (n=1236), and the Silent Generation ages 75+ (n=124).

DATA ARE WEIGHTED WHERE NECESSARY TO BRING THEM IN LINE WITH THEIR ACTUAL PROPORTIONS IN THE POPULATION. A GLOBAL POSTWEIGHT WAS APPLIED TO ENSURE EQUAL WEIGHT OF EACH COUNTRY IN THE GLOBAL TOTAL. THIS ONLINE SURVEY IS NOT BASED ON A PROBABILITY SAMPLE AND THEREFORE NO ESTIMATE OF THEORETICAL SAMPLING ERROR CAN BE CALCULATED.
As the global leader in snacking, we’ve always obsessed over the role snacking plays in our consumers’ lives, not only fueling our bodies, but how they shape our daily rituals, habits, and even sense of culture and identity. A year ago, we took this a step further by launching a new business growth strategy and announcing our purpose at Mondelēz International - empower people to snack right by offering the right snack, for the right moment, made the right way.

My team and I are constantly learning about our consumers’ evolving behaviors, emerging trends, and range of needs to uncover insights to shape how we serve up snacking made right. We’ve combined our vast global trends and consumer behavior expertise and partnered with an independent consumer polling specialist to study the evolving role snacking plays in the lives of our consumers around the world. From millennials in Indonesia, to grandparents in Germany, we gained insight to the daily snacking habits of thousands of people across our markets and confirmed what we have always known to be true: as the complexity of our daily lives deepens, snacking is outpacing mealtime – but what, how, and why we snack is about so much more than what we eat as our relationship with food fundamentally changes.

As the snacking market continues to grow globally, the majority of adults, 6 in 10 of us, now prefer to eat small bites throughout the day as opposed to larger meals. For millennials, that number increases to 7 in 10. In fact, snacking has become so integral to how we eat, that 61% of us say we can’t imagine our life without daily snacking moments. A third of us (30%) are so dedicated to our favorite snack that we’d rather give up social media for a month than miss out on enjoying a daily treat.

At Mondelēz International, we have long known that wellbeing plays an important role in why we snack, and we’re committed to helping people around the world be more mindful in the way they enjoy our products across the spectrum from wholesome to indulgent. And increasingly, consumers are thinking about how smaller bites are integral to their emotional wellbeing, as well as their physical health. In Asia, 77% of us believe snacking is as important to our mental health as our physical state, compared to 7 in 10 of us in the rest of the world. Among millennials, 8 in 10 use their snacking moments as an opportunity to slow down and find moments of quieter, mindful reflection. And as our sense of wellbeing evolves, 77% of us agree there is a time and a place for healthy and indulgent snacks alike. This is why I am confident our growing portfolio of global brands and local jewels will continue to be the right snack, for the right moment, made the right way for generations to come.

As you read through this inaugural State of Snacking™: 2019 Global Consumer Snacking Trends Study, you will see that the topics I’ve touched on barely scratch the surface of what snacking means in our lives. You will read that for some of us, enjoying a small bite is a way to connect ourselves to home, while for others, it opens bite-sized doors to cultures worlds away. But whatever you take from the findings, I hope you will agree that snacking trends around the world are as diverse as the consumers who enjoy them.

I look forward to hearing your thoughts and comments.
As the snacking market continues to grow globally, people are turning to these personal points of daily satisfaction as a common ground for shared experiences, connections, and identity. This report explores the nature of daily snacking moments, mindsets, and rituals that fuel not only our bodies but also our individual and cultural identities.

Key research findings in the United States include:

- **Snacking is eclipsing meals as appetite for smaller bites grows**: The average American now eats more snacks than meals on a given day, with 8 in 10 saying snacking helps them get through the day (78%, +7% global average) and 7 in 10 saying they can’t imagine their life without snacks (69%, +8% global average).

- **Snacking shapes personal & cultural identity**: The vast majority of American centennials and millennials say, “food is a major part of my identity” (71%). For many, snacking represent nostalgia – 83% of America’s youngest consumers say snacking is a way to remind themselves of home – and connection, with 3 in 4 making an effort to share their favorite childhood snacks with others (74%).

- **Bite-sized meals empower mindful indulgence for Americans**: Snackers in the U.S. are seeking access to both healthy and indulgent options, depending on the moment of need. While 3 in 4 say they can’t imagine a world without chocolate (76%), the same amount lean on snacking to help them control hunger and manage calories throughout the day (78%).
IN THE U.S., SNACKS ARE AN INDISPENSABLE PART OF THE EVERYDAY

THE AVERAGE AMERICAN NOW EATS MORE SNACKS THAN MEALS DAILY

1.09
SNACKS FOR EVERY MEAL CONSUMED DAILY

78%
“SNACKING HELPS ME GET THROUGH THE DAY.”
+7% GLOBAL AVERAGE

58%
“I LOOK FORWARD TO THE SNACKS IN MY DAY, MORE THAN THE MEALS.”

60% of Americans prefer to eat many small meals throughout the day, as opposed to a few large ones.
AMERICANS ARE ESPECIALLY LIKELY TO SNACK IN THE AFTERNOON
MORE THAN HALF OF AMERICANS SAY, "QUICK, ON-THE-GO BITES ARE MORE SUITED TO MY LIFESTYLE THAN FULL MEALS" (57%)

*Daypart data source: Mondelēz International Demand Spaces Research
SNACKING ALSO SHAPES IDENTITY, ESPECIALLY FOR YOUNGER AMERICANS

71% of American Centennials / Millennials say, “Food is a major part of my identity”

83% US CENTENNIALS / MILLENNIALS
“Snacking is a way to remind myself of home.”

83% US CENTENNIALS / MILLENNIALS
“Snacking on my favorite foods from childhood makes me nostalgic.”

74% US CENTENNIALS / MILLENNIALS
“I make an effort to share my favorite childhood snacks with others.”
IN THE U.S., SNACKING TRADITIONS BRIDGE GENERATIONS

77% of American adults say, “Some of my fondest childhood memories include sharing a snack with my parents.”

American parents want to pass on...

Healthy snack traditions (90%)

+5% global average

Their favorite childhood snacks (87%)

+6% global average

Cultural snacking rituals (77%)

88% of American parents say, “Sharing my favorite childhood snacks with my children is a small way to connect with them.”

+6% global average
SNACKING IS OFTEN A PICK-ME-UP TO BOOST MOOD AND ENERGY

MILLENNIALS ARE ESPECIALLY LIKELY TO LEAN INTO SNACKING AS FUEL TO STAY ALERT

TOP 3 MOTIVATIONS FOR SNACKING

1. To boost my mood 76% TOTAL / 83% MILLENNIALS
2. To stay alert / energized 75% TOTAL / 86% MILLENNIALS
3. To pamper / spoil / reward myself 75% TOTAL / 83% MILLENNIALS

AMERICAN SNACKERS SEEK BITES THAT MEET MANY NEEDS

While indulgence is indispensable, with 76% of Americans say they can’t imagine a world without chocolate (+9% global average), the same amount lean into snacks as a tool to manage nutrition, saying snacking helps them control hunger and manage calories throughout the day (+7% global average).

7 in 10 Americans say, “the snacks in my day are more for my personal needs, while meals tend to meet the needs of others” (70%).

+10% GLOBAL AVERAGE
EVEN WHEN INDULGING, AMERICANS VALUE SPEED AND BALANCE
MORE THAN TWO-THIRDS OF AMERICAN ADULTS SAY, “SNACKING CAN HELP IMPROVE MY QUALITY OF LIFE” (69%)

REASONS TO SNACK AS A TREAT OR REWARD

- 31% ENJOY SOMETHING TASTY AND HEALTHY
- 31% ENJOY MYSELF / GET LOST IN THE MOMENT
- 21% TO HAVE FUN
- 11% HAVE A QUICK, SWEET TREAT
- 7% NONE

83% “I APPRECIATE HAVING THE OPTION OF BOTH HEALTHY AND INDULGENT SNACKS DEPENDING ON THE MOMENT OF NEED.”

70% “WHEN I SNACK FOR INDULGENCE, IT’S LESS IMPORTANT TO MAKE A HEALTHIER CHOICE.”
Most seek a future that fuels wellbeing via snacking

72% of American adults say, “I wish more food brands empowered me to snack right”

57%

“Snacking is the future of food.”

51%

“I think snacks of the future will be healthier than they are today.”

In the next 5 years, I hope snack foods...

1. Become more functional to meet nutritional needs
2. Provide more personalized nutrition
3. Use ingredients that are easier to understand
4. Become more convenient/portable
5. Are more transparent in where they come from

32% US millennials also hope snacks will incorporate new and foreign flavors and formats (vs. 24% Americans overall)
For more information, please contact news@mdlz.com.