SNACKING

a SNAP! keynote

- deep dives into consumer snacking behavior
- consumer affinity by snack type
- top-performing snacks at leading restaurant chains
- snack type consumption indexed by daypart
- operator adoption and approach to menuing snacks
- how daypart impacts operators' snacking sales

Snacking has become much more than a holdover until the next meal – it is an ingrained cultural practice. Just about everyone loves a good snack. Most consumers snacked yesterday, and the majority of them snacked multiple times. Many foodservice operators are now equipped to cater to those looking to whet their appetites between meals. Datassential's Snacking Keynote covers everything on snacking, including the lowdown on trendy up-and-comers such as global and CBD-infused snacks. **So snack on these slides. We promise they won't ruin your appetite.**

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FOOD WITH A STORY

SNACKING: a SNAP! keynote

Topics covered

understand how consumers feel about their snacks

- learn which salty and sweet items are among consumers' most loved snacks
- find out how consumers feel regarding the snacking options offered at the nation's largest chains, grocery stores, and convenience stores

explore the snacking habits of nearly 1,800 consumers

- observe the differences between what snackers claim they indulge on and what they are actually consuming
- identify behavioral differences in terms of snacking habits among numerous demographic slices, such as age, gender, and parental status

unravel the latest snacking trends offered by leading chains

- dig into successful snacks and how consumer metrics such as purchase intent and uniqueness vary among different items
- look closely at the latest trends like global snacks, alternative chips, and CBD-infused snacks, as well as classics like loaded fries and mini versions of classic dishes

discern how operators across segments approach snacking

- see how snack type and daypart affect sales of snack items from a foodservice perspective
- dive into the main drivers of sales among operator patrons

From the report

CONSUMERS

96% of consumers had a snack food item yesterday

59% of overall snacks consumed were planned in advance

55% would pay more for an organic snack

OPERATORS

97% menu snackable items somewhere on their menu

83% offer snack items during lunch time

68% consider snacks profitable to their operations overall

1,078 consumers + 738 snacking diary consumers

303 operators

report

x-tab tool

webinar

DOWNLOAD TODAY. Please contact Brian Darr at 312-655-0594 or brian@datassential.com.

KR KEYNOTE REPORT

SNACKING

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Brian Darr
312-655-0594
brian@datassential.com

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METHODOLOGY

fielded online November 2019

1,078 consumers were surveyed overall

- A subset of this general-population sample, 738 consumers, is broken out in the Consumer Snacking Diary section in the report. Respondents who were excluded from that section had not consumed a snack in the past day at the time they took Datassential's online survey.

303 operators via the Datassential panel

- 141 restaurant operators
- 109 on-site operators
- 53 retail foodservice operators

full demographic info is available in the appendix

OBJECTIVES

- identify consumer snack consumption habits and preferences
- understand consumer motivations for and attitudes toward snacking at home and away from home
- analyze operator motivators, preferences, and challenges with menuing "snackable" items
- in-depth analysis of new menu items positioned as snacks
- identify supplier opportunities where operators and consumers have unmet snacking needs

Snack Definition

In this report, we define snacking differently for consumers vs. operators.

CONSUMER Definition:

In our custom survey, we asked consumers to consider snacks as **"anything that you ate or drank yesterday outside of what you would consider to be full meals"** regardless of daypart.

OPERATOR Definition:

Operators surveyed for this report were asked about snacking as a **distinct daypart between traditional meal service** of breakfast, lunch, and dinner. Snacks were designated as AM, PM (afternoon), or late-night. We also asked operators about **"snackable" foods**, such as tacos or fried appetizers, and about their general attitudes toward snacking.

Snack Food Categories

In this report we break snack food into **33 individual items** across four categories: **salty** snacks, **sweet** snacks, **natural** snacks, and **entrées**. Those categories are defined as such:

SALTY Snacks: 3 groups: **salty, crunchy snack foods** (like chips, pretzels, crackers, and cheese puffs) and **french fries**. All others fall into **other salty snacks**.

SWEET Snacks: 8 groups: **cookies**, **other sweet baked goods** (like brownies, muffins, and pie), **donuts**, **candy**, **ice cream**, **breakfast cereal**, and **snack bars** (including granola bars, protein bars, etc.). All others fall into **other sweet snacks**.

NATURAL Snacks: 11 groups: **fruit**, **veggies**, **salad**, **nuts**, **jerky**, **meat & cheese packs**, **cheese**, **yogurt**, **hummus**, and **trail mix**. All others fall into **other natural snacks**.

ENTRÉE Snacks: 11 groups: **sandwiches**, **burgers**, **pasta**, **pizza**, **burritos/tacos**, **hot dogs**, **chicken wings/nuggets**, **soup**, **eggs**, and **leftovers**. All others fall into **other entrées**.

Slide Legend

In addition to custom research, this report taps into Datassential's SNAP! platform. Refer to the stripe on the left side and the icon on the bottom right corner to learn the source of the slide's data.

Survey Data

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MenuTrends

MENUTRENDS

DATASSENTIAL SCORES

SCORES

flavor

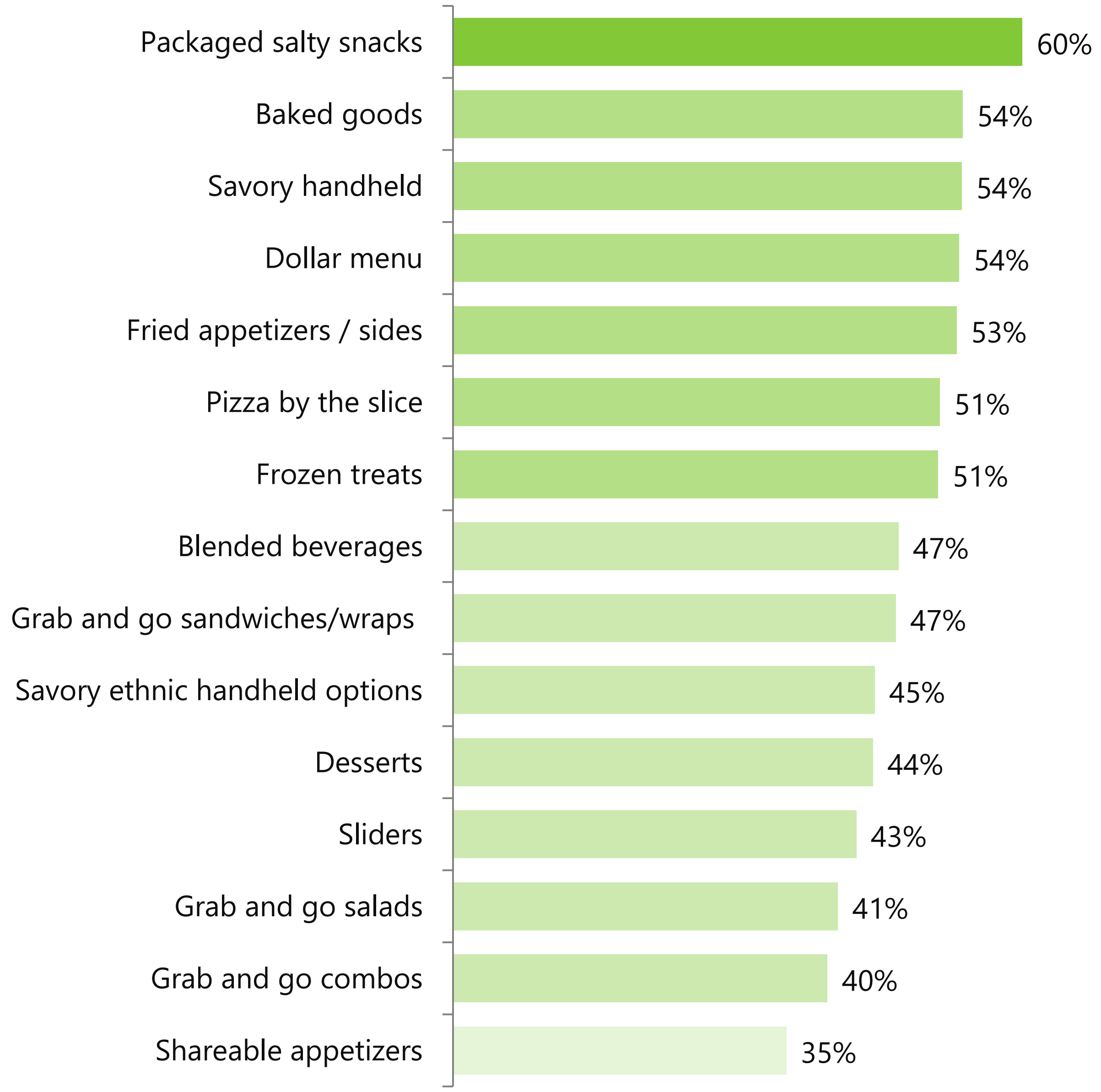
flavor

BrandFingerprints

BrandFingerprints

Likelihood to Order Foods as Snacks

top-2 box, 5-point scale

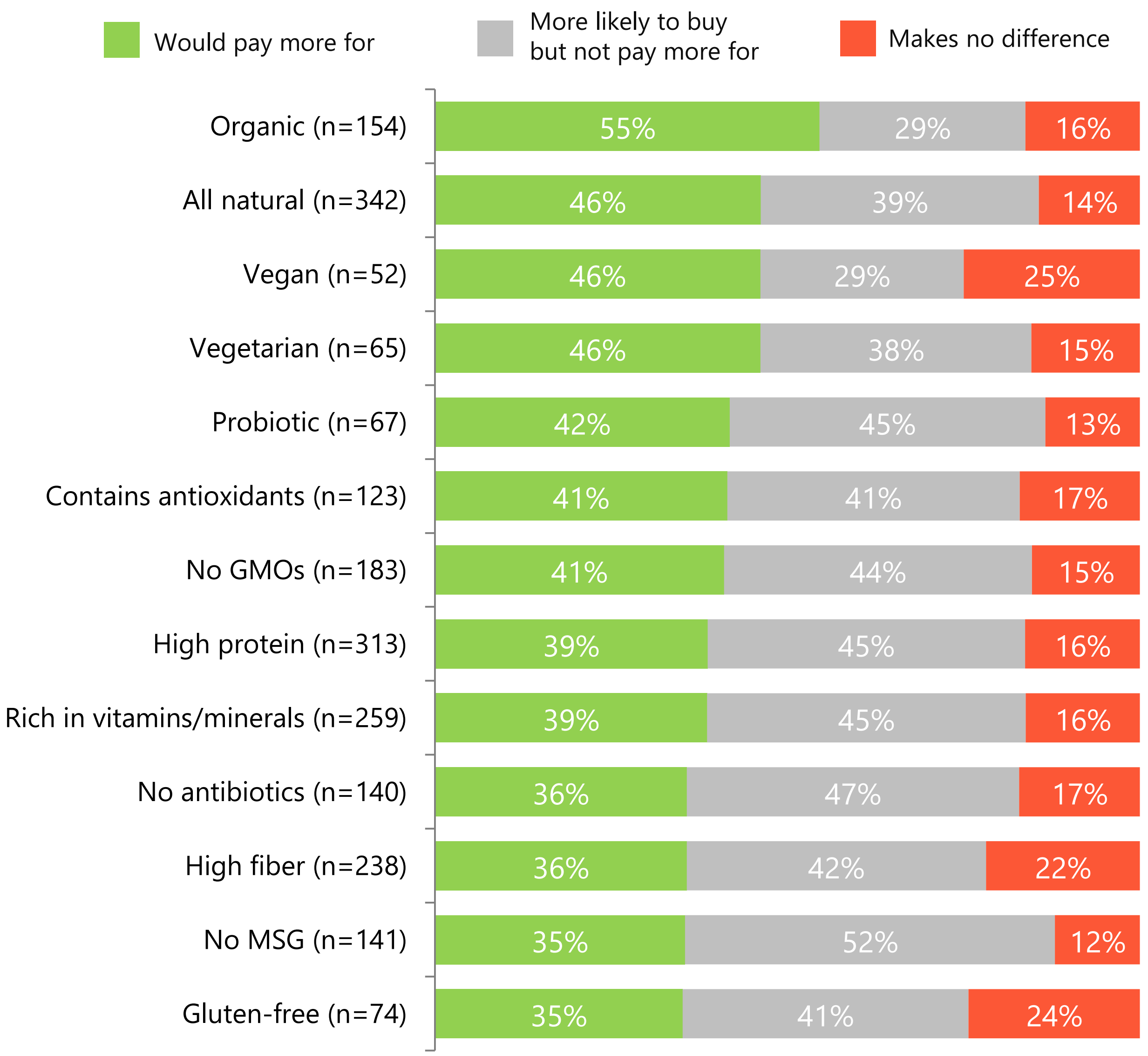


n=1,078

B6: How likely would you say you are to order each of the following types of foods as a snack outside of regular meals from a restaurant or other eating establishment?

Likelihood to Pay More for Healthful Attributes in Snacks

% selecting



n=varies

B11: Thinking specifically of SNACKS, please indicate if you would PAY MORE FOR a snack with this attribute, be MORE LIKELY TO BUY a snack with this attribute, BUT NOT PAY MORE, or IT MAKES NO DIFFERENCE.

Snacking Diary: Need States

	All Snack Occasions*	All Beverage Only Occasions
	n=7,921	1,751
Hungry or Thirsty	**28%**	30%
Habit	14%	23%
Specific Craving	8%	7%
Energy Boost	8%	13%
Treat / Reward	7%	5%
Hold Over til Next Meal	6%	3%
Health Boost / Nutrition	6%	3%
Save Time vs. Full Meal	3%	2%
Boredom	3%	1%
Tempted by Sight	3%	1%
Save Money vs. Full Meal	3%	1%
Tempted by Smell	2%	1%
Stress Eating	2%	1%
Because Others are Snacking	2%	1%
Other	4%	7%

statistically higher than the total | statistically lower than the total

*Counts all dayparts when a food and/or beverage was consumed; each respondent could have up to 7.

n=varies

A4: Why did you have each snack? For each of the snacks that you had yesterday, Please select the option from the drop-down menu that describes the motivation for having that snack at that time. If none of the options describe why you had that snack, please select "Other."

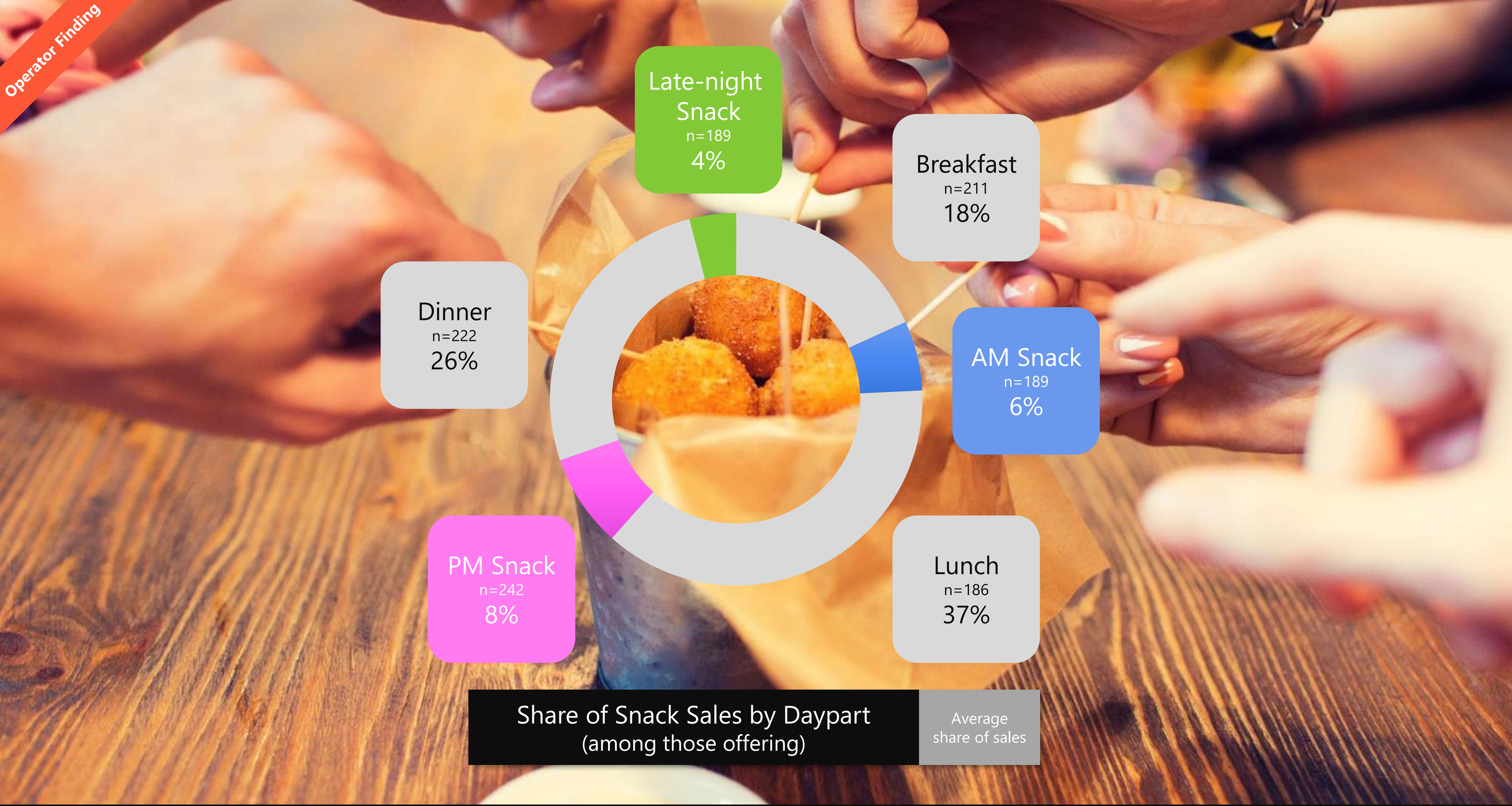
Penetration of Snackable Foods

Snack Positioning

*See slide 80 for the list of snackable items presented to respondents

n=303
n= 294

Operator A2: Are any of these smaller-portioned, handheld, or to-go items specifically labeled or promoted on your menu as “snacks”?



n=varies

Operator B1: Approximately what percentage of your daily revenues come from each of the following dayparts? If you do not offer that daypart, enter a '0' in the space provided. Totals must add to 100%

Most consumers either already purchase snacks from most restaurant segments or are open to doing so. Quick-service outlets are the most frequented for snacks, but nearly every segment has some purchase frequency or interest. Surprisingly, vending and kiosks hold no interest for nearly half of snacking consumers, perhaps because they do not have regular access to them (such as at work).

Snack Purchasing by Segment

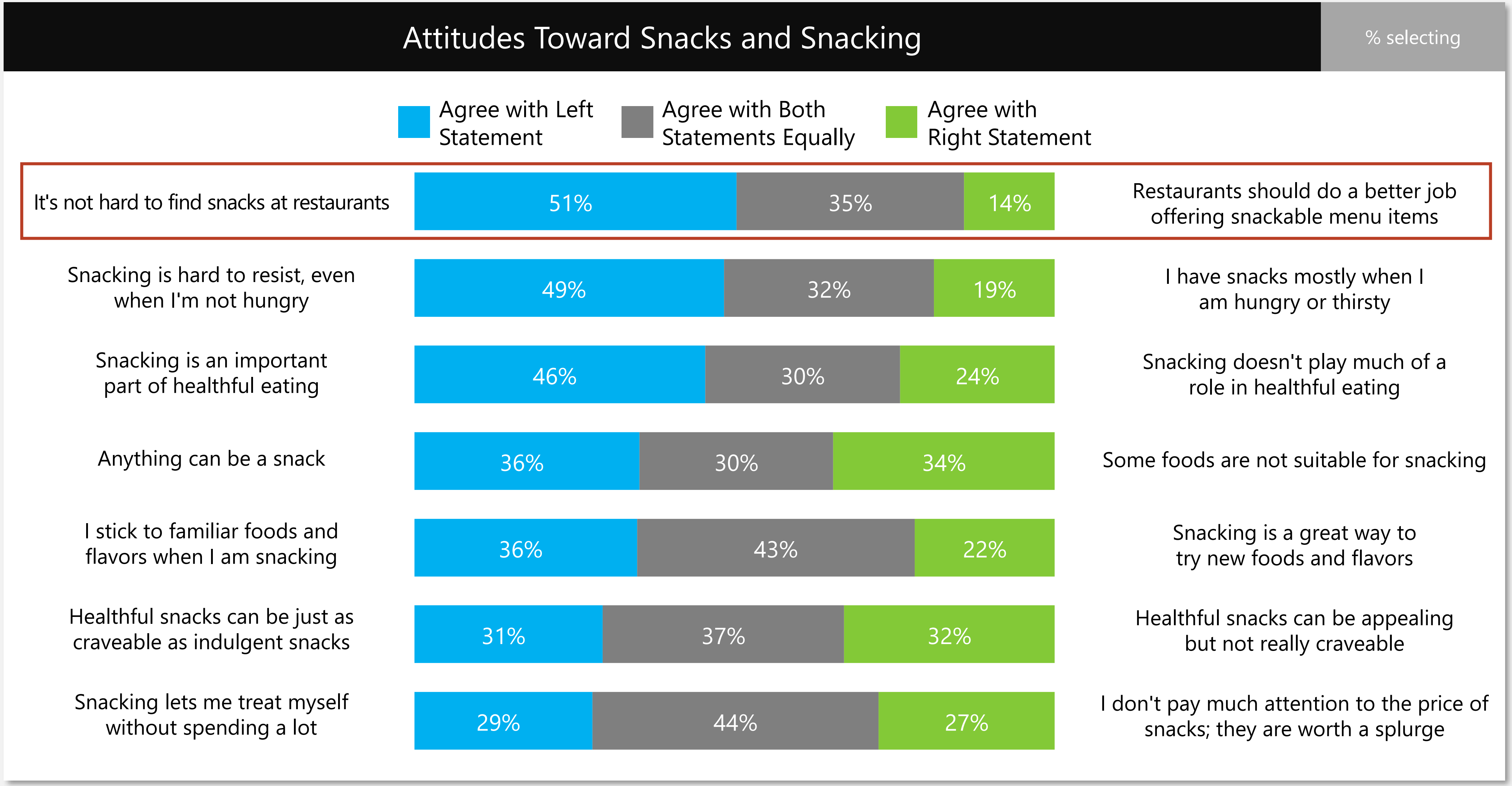
% selecting

	Once per Week or More	Once every 2 Weeks	Once per Month	Less than Once per Month	Don't Purchase, but Open to Purchasing	Don't Purchase, Not Interested
Traditional fast food restaurant	24%	19%	19%	18%	6%	16%
Higher-end quick service restaurant	8%	12%	19%	22%	13%	26%
Family-style sit-down restaurant	8%	12%	22%	23%	12%	23%
Casual sit-down restaurant	9%	13%	22%	24%	12%	21%
Higher-end casual sit-down restaurant	6%	10%	15%	27%	14%	28%
Fine dining restaurant	6%	9%	12%	25%	16%	33%
Retail store food court	8%	11%	17%	17%	17%	31%
Food truck / food stand / food kiosk	6%	8%	10%	15%	21%	41%
Convenience store / gas station mart	17%	12%	13%	18%	11%	29%
Ready-to-eat snack from supermarket prepared foods	13%	17%	16%	18%	12%	25%
Vending machine/micro market	8%	8%	8%	17%	13%	45%

n=1,078

B4: How often do you purchase snacks at each of the following types of eating establishments? Please only think about foods and beverages that you purchase as snacks outside of regular meals. If you do not purchase snacks at that type of establishment, please select whether or not you are open to purchasing snacks at that type of establishment.

Although restaurants do little promotion around snacking, most consumers say they can easily find between-meal items on the menu. In addition, snack healthfulness and craveability are not mutually exclusive in customers' minds.



n=1,078

B9: Below are pairs of statements that may describe your attitudes toward snacking. For each pair, please select which BEST describes your opinions. If you agree with them both equally, select Neutral. Select one per row.

Operator Finding

Interest in Supplier Support with Snacking

	Total
	n=
Smaller case sizes/packaging	45%
Recipe ideas/ menu suggestions	39%
More seasonal products	34%
Data / information on industry trends (food trends, culinary trends, consumer preference, etc.)	31%
Marketing assistance	27%
Menu analysis and costing	27%
Staff training (culinary techniques, customer service, food safety, etc.)	17%
None of the above: We have no interest in growing our snacking/ non-traditional daypart sales	16%

statistically lower than the total

statistically higher than the total

n=varies

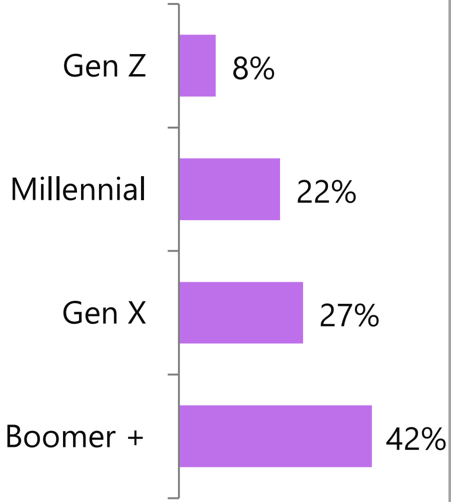
Operator B14: Which of the following would you be interested in from your suppliers to help grow your snacking/ off-peak daypart sales?
Operator B15: What types of mini, portable, handheld, or other snack-friendly products would you like to see from your suppliers in the future?

1,078 survey consumers*

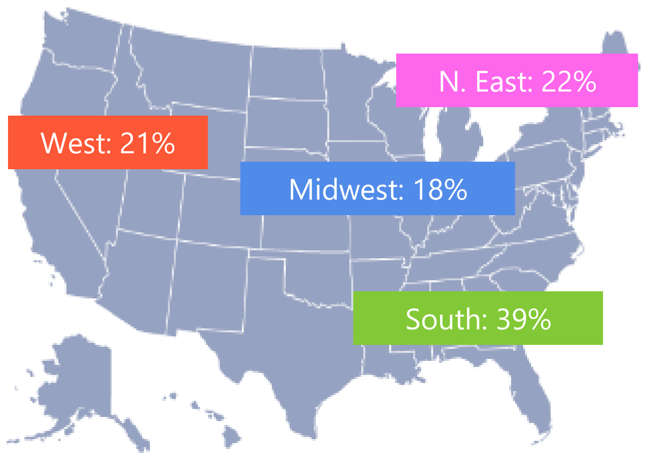
Gender

44% 55%

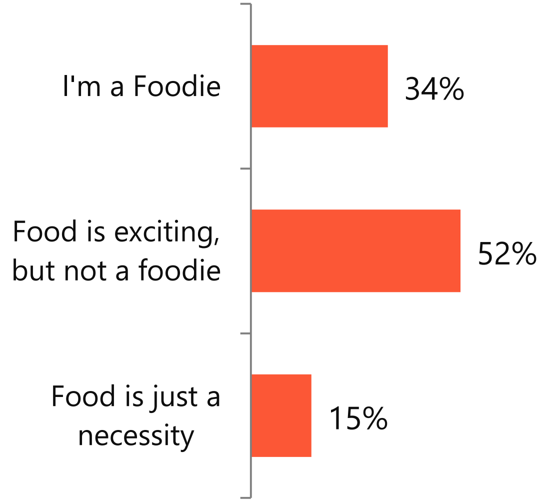
Age



Region



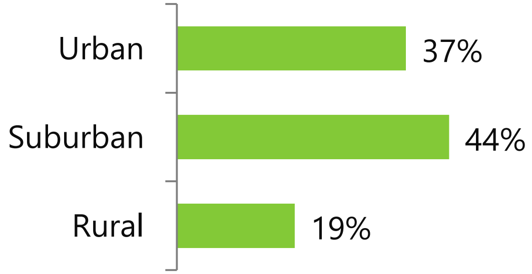
Food Attitudes



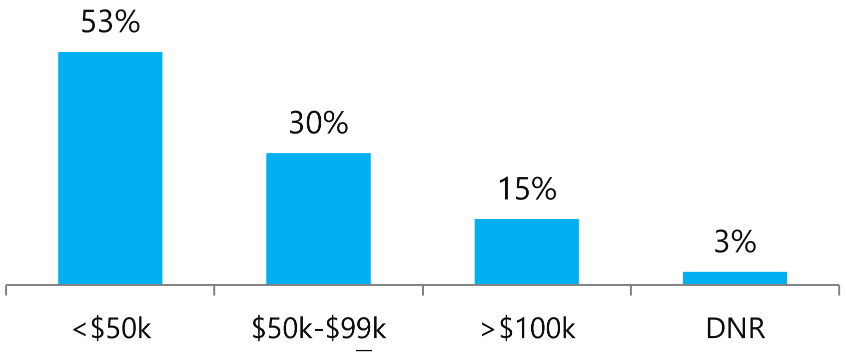
Ethnicity

White	53%
Hispanic	19%
Black	18%
Asian	5%
Other	5%

Area Type



Household Income



Children in Household

No children in household	70%
Children in household	30%

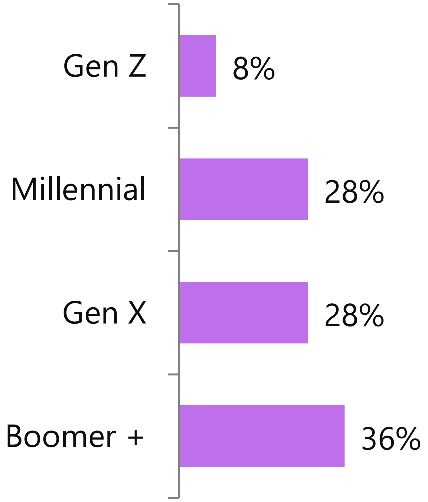
*Some of these consumers were excluded from the snacking diary exercise for not meeting the proper criteria (e.g. didn't have a snack yesterday).

738 snacking diary consumers

Gender

46% 53%

Age



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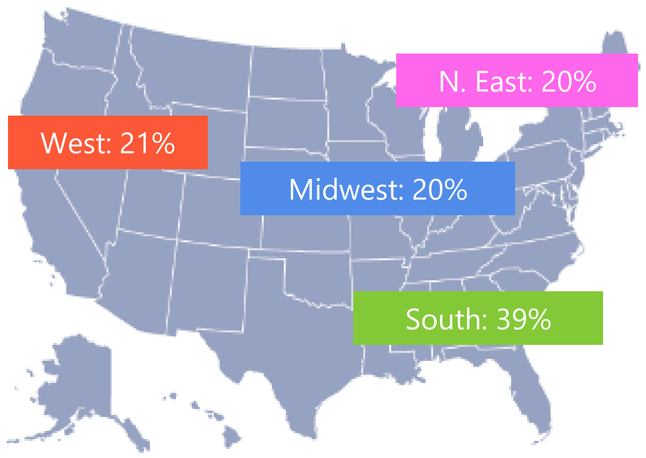
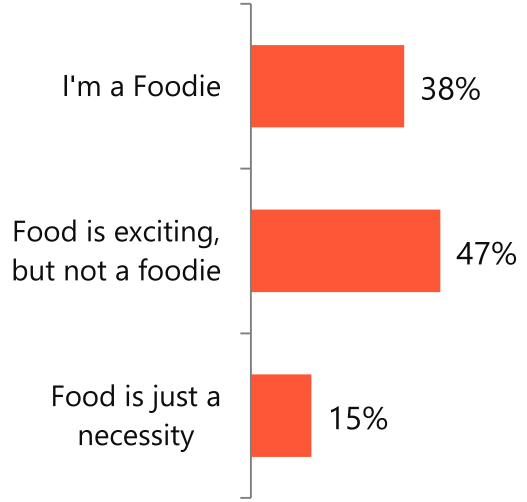


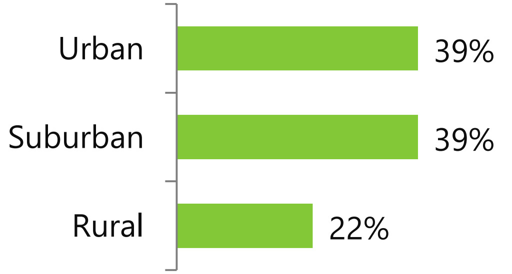
Food Attitudes



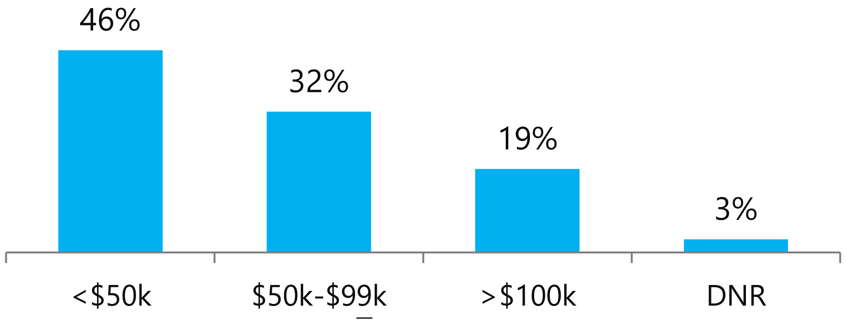
Ethnicity

White	62%
Hispanic	16%
Black	14%
Asian	5%
Other	2%

Area Type



Household Income



Children in Household

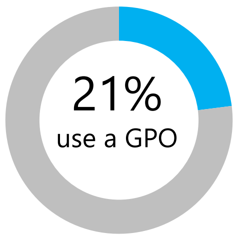
No children in household	63%
Children in household	37%

303 operators

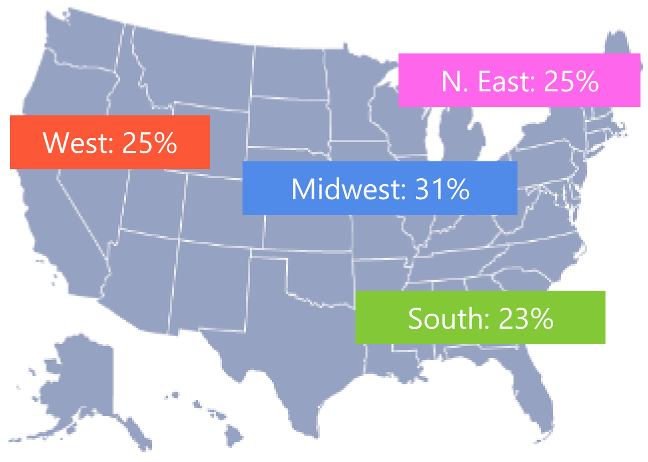
Segment

47% Restaurant		36% On-Site		17% Retail	
QSR	6%	Corporate	8%	Supermarket	8%
Fast Casual	7%	C&U	8%	C-Store	10%
Midscale	13%	K-12	7%		
Casual	13%	Healthcare	8%		
Fine Dining	7%	Lodging	5%		

GPO Status



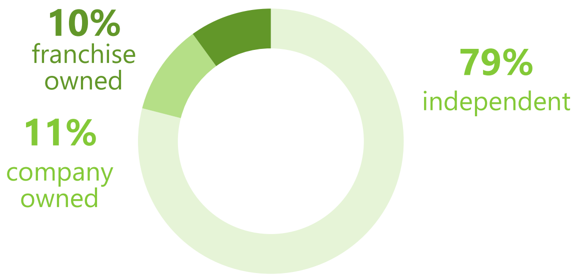
Region



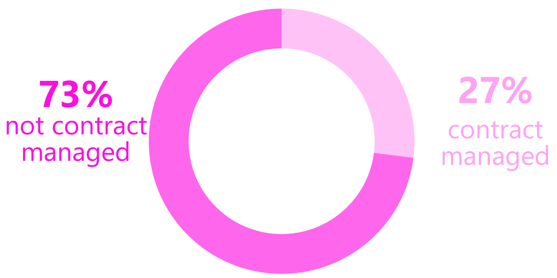
Distributor

Sysco	34%
U.S. Foods	21%
Gordon	8%
PFG	6%
Cash and Carry	4%
Other	27%

Restaurant Chain Affiliation



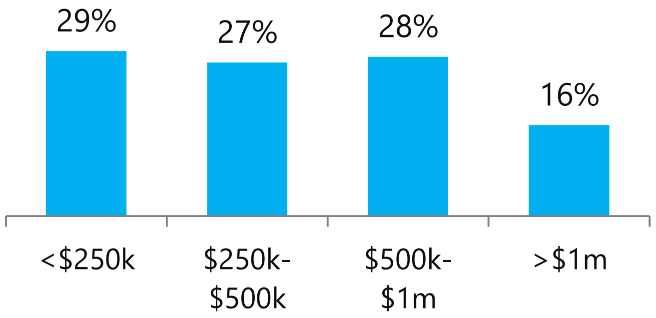
On-Site Contract MGMT



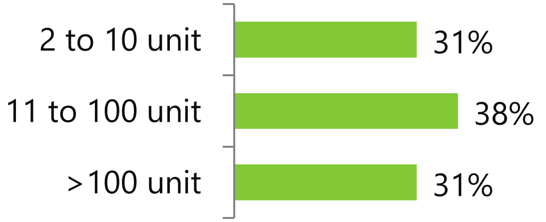
Job Title

Owner/Operator	29%
General Manager	25%
Manager	16%
F&B Director	12%
Exec. Chef/Chef	7%
Other	11%

Annual F&B Purchasing



Restaurant Chain Size



Contract MGRs Used

Sodexo	39%
Compass	25%
Aramark	18%
Other	18%

Skill Level

All/Almost All Scratch	11%
Majority Scratch	29%
Half Scratch/ Half Pre-Made	45%
All/Almost All Pre-Made	16%

exhibit guide

exhibit guide

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solution

Contact Brian Darr:
312-655-0594
brian@datassential.com